

Philippines Data Center Storage - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2030

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

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Report description:

The Philippines Data Center Storage Market size is estimated at USD 0.62 billion in 2024, and is expected to reach USD 1.11 billion by 2030, growing at a CAGR of 10.31% during the forecast period (2024-2030).

The increasing demand for cloud computing among SMEs, government regulations for local data security, and growing investment by domestic players are some of the major factors driving the demand for data centers in the country, leading to a growing need for data center storage equipment.

Under Construction IT Load Capacity: The upcoming IT load capacity of the Philippines data center market is expected to reach 730 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 2620 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach 130K units by 2029. NCR (Metro Manila) is expected to house the maximum number of racks by 2029.

Planned Submarine Cables: There are close to 20 submarine cable systems connecting the Philippines, and many are under construction. One such submarine cable that is estimated to start service in 2024 is SEA-H2X, which stretches over 5,000 Kilometers with landing points from La Union, Philippines.

Philippines Data Center Storage Market Trends

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IT & Telecommunication Segment to Hold Major Share in the Market

- Emerging cloud technologies in data centers are one of the key factors driving the demand for data center systems and technologies, thereby driving the data center storage market's growth. Cloud technology is more flexible as it can be accessed using a variety of devices, and lost data can be easily recovered. At the same time, cloud computing provides high speed and helps other businesses grow. Therefore, cloud services account for a large part of the business, driving the growth of the domestic data center market and thereby increasing the market value of data center storage equipment.
- As the telecom network developed and improved its facilities, users could attain good mobile data speeds on their smartphones, increasing their functionality and experience. Online games on mobile have improved their quality, and the events they organize have increased the demand for smartphones. Furthermore, with the growth of data-intensive technologies, cloud computing, and digital services, businesses are generating and processing larger amounts of data. Data centers must scale their storage infrastructure to accommodate this increased workload. This may include adding flash storage and drives to existing data centers or building new data centers. The increase in the number of data centers is directly related to the demand for storage devices in IT infrastructure. As data centers increase, more storage devices are required to meet the growing computing needs.
- Post-pandemic, the demand for smartphones has significantly increased as they have become useful for browsing, financial transactions, online shopping, and others. People are adopting urban lifestyles and use these gadgets for automation functions in their homes, online gaming, streaming content, browsing news, and online shopping. Increasing internet penetration, increased use of social networks, improved automation technology, smart city initiatives, and implementation of AI across industries are driving investment in data centers. As the number of data centers increases, so does the demand for data center storage in the country.
- The continued increase in the use of smartphones with increasing adoption of 5G networks among users, increased data traffic, and increased e-commerce, including mobile phones and computer games, has given the telecommunications sector its dominance. It will have a positive impact on the growth of data centers in the country. This will increase the need for data storage and, thus, increase the need for data center storage equipment, thereby increasing market value.
- The growth in the telecom segment considerably increased after the pandemic, with new remote work and online study options being adopted as the new normal. Furthermore, streaming services, online gaming, and shopping contributed to the considerable increase in the demand for data centers from the telecom industry. The Department of Information and Communications Technology brought out a new policy called the Common Tower Policy, which is expected to improve the quality of mobile networks further. The increase in data consumption increases the use of data centers, thereby increasing the use of data center storage equipment.

Hybrid Storage Expected To Hold Significant Share

- The combination of on-premises and cloud storage solutions is known as data center hybrid storage. This approach takes advantage of the best of both environments and provides the flexibility to store and manage data on-premises and in the cloud.
- In recent years, the market for cloud gaming has grown significantly, with more and more players opting to use cloud-based solutions instead of traditional video games. For instance, the first 5G eSports hub in the Philippines was launched by Smart Communications, marking the occasion of the first cross-platform gaming exhibition match to be held on the cloud, a nationwide first as businesses are expanding and adapting to meet the growing connectivity needs of various industries and increasing use of the internet. Businesses increasingly rely on hybrid infrastructure and cloud capabilities for flexibility, scalability, and remote work capabilities. Data traffic is also increasing, and thereby, the need for storage for businesses is growing in importance, thus increasing the market value for hybrid storage solutions.
- The growing demand for analytics and software for business purposes by the public and private industries is expected to boost

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the growth of the cloud segment. Thus, increasing the use of data centers and hybrid data center storage helps to effectively utilize storage, reduce overall storage footprint, and optimize storage management. The growing demand for agile, cost-effective, and flexible computing drives the demand for hybrid storage.

- Several service providers are deploying advanced storage solutions to ensure data availability and access in hybrid clouds. The companies are offering optimized hybrid storage systems. For example, HPE GreenLake, an updated app and data product, also introduced platform upgrades and new cloud services in 2022. Therefore, this product portfolio is adopted by large enterprises with large data storage capacities. This increases the demand for hybrid storage in the country.

- Businesses are moving from public cloud to hybrid IT. The companies are growing businesses and providing adequate customer service; hence, the requirement of storing and processing intense data creates the need for hybrid storage.

Philippines Data Center Storage Industry Overview

The Philippines Data Center Storage needs to be more cohesive. The major players in this market hold the majority of the market share. Some significant players are Dell Inc., Huawei Technologies Co. Ltd, Kingston Technology Company Inc., Lenovo Group Limited, and Fujitsu Limited. These companies leverage strategic collaborative initiatives to increase their market share and increase their profitability.

September 2023: Pure Storage has appointed Westcon-Comstor as its newest distributor in Australia. The partnership is an expansion of the two companies' existing agreements in New Zealand, Singapore, Indonesia, Malaysia, China, Hong Kong, and the Philippines. The partnership accelerates the adoption of FlashStack - a software-defined hybrid cloud infrastructure from Pure and Cisco that integrates computing, networking, and storage.

August 2023: Lenovo introduces the Lenovo ThinkSystem D4390 Direct with storage expansion features rich in powerful 24Gbps SAS directly attached drives designed to provide density, speed, scalability, security, and high availability for high-capacity applications.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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