

Vietnam Cloud Storage Market By Component (Solution, Service), By Deployment Mode (Public, Private, Hybrid), By Organization Size (Large Enterprises, SMEs), By End User Industry (IT & Telecommunications, BFSI, Healthcare, Retail & E-Commerce, Manufacturing & Engineering, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Report description:

Vietnam Cloud Storage Market was valued at USD 198.87 Million in 2024 and is anticipated to reach USD 650.33 Million through 2030 with a CAGR of 21.65% through 2030F. Cloud storage is an internet-based service model where data is stored on remote servers, enabling users to manage, back up, and access their data online rather than on local systems. The market for cloud storage is poised for significant growth due to several driving factors. The exponential increase in data generation from digital devices, social media, e-commerce, and IoT necessitates scalable and efficient storage solutions, propelling the demand for cloud services. Digital transformation across various industries further boosts this demand, as cloud storage facilitates seamless data management, accessibility, and collaboration. Additionally, the cost efficiency of cloud storage, which eliminates the need for hefty upfront investments in physical infrastructure and allows for pay-as-you-go models, appeals to both large enterprises and SMEs. The COVID-19 pandemic has also accelerated the shift to remote work, highlighting the need for secure and reliable data access from any location, which cloud storage effectively provides. Government initiatives and regulations promoting cloud adoption, such as those by the Vietnamese government aimed at developing e-governance and smart cities, further support market growth. Technological advancements in cloud security, AI integration, and disaster recovery solutions continue to enhance the attractiveness of cloud storage, making it a critical component of modern IT infrastructure. Overall, these factors collectively drive the robust expansion of the cloud storage market, meeting the evolving data needs of businesses and individuals alike.

Key Market Drivers

Exponential Data Growth

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The exponential growth of data is a primary driver of the Vietnam Cloud Storage Market. With the proliferation of digital devices, social media, e-commerce platforms, and the Internet of Things (IoT), the volume of data generated globally has increased dramatically. In Vietnam, this trend is particularly evident as more individuals and businesses adopt digital technologies. The need to store, manage, and analyze this vast amount of data has created a substantial demand for scalable and efficient storage solutions. Traditional on-premises storage systems are often inadequate to handle the surging data volumes, leading organizations to turn to cloud storage solutions that offer virtually limitless capacity. Cloud storage allows businesses to easily scale their storage needs up or down based on demand, without the need for significant capital investments in physical infrastructure. This flexibility is crucial for businesses in Vietnam, where the economic landscape includes a large number of small and medium-sized enterprises (SMEs) that require cost-effective yet robust data storage solutions. Moreover, the rise of big data analytics necessitates high-performance storage capabilities, which cloud services can efficiently provide. Companies are increasingly leveraging cloud storage to store large datasets and perform complex data analytics, driving business insights and competitive advantage. This trend is expected to continue as the digital economy in Vietnam grows, further propelling the adoption of cloud storage services. Vietnam's data consumption is expected to increase by 27% annually, driven by the growing adoption of digital services and e-commerce, leading to higher demand for cloud storage solutions to manage and store large volumes of data.

Digital Transformation Initiatives

Digital transformation initiatives across various sectors are another significant driver of the Vietnam Cloud Storage Market. The Vietnamese government has been actively promoting digital transformation as part of its broader economic development strategy. Programs like Digital Vietnam and Smart Cities are designed to enhance digital infrastructure and promote the adoption of advanced technologies across industries. These initiatives have accelerated the adoption of cloud services, including cloud storage, as organizations seek to modernize their operations and improve efficiency. In the public sector, cloud storage solutions are being used to support e-governance and digital public services, improving accessibility and service delivery to citizens. In the private sector, businesses across industries such as finance, healthcare, retail, and manufacturing are leveraging cloud storage to streamline their operations, enhance data security, and enable remote work capabilities. The ability to access and share data seamlessly from any location is particularly beneficial in the current era of increasing remote and hybrid work environments. Additionally, cloud storage solutions support innovation by providing the infrastructure needed for emerging technologies like artificial intelligence (AI), machine learning (ML), and the Internet of Things (IoT). As businesses in Vietnam continue to embrace digital transformation, the demand for cloud storage is expected to grow, driven by the need for reliable, scalable, and secure data management solutions. The Vietnamese government's Digital Transformation Program aims for 80% of businesses to integrate digital technologies by 2025, which is expected to increase demand for cloud storage services as businesses migrate their data and operations to the cloud.

Cost Efficiency and Scalability

The cost efficiency and scalability of cloud storage are compelling drivers of its adoption in Vietnam. Traditional on-premises storage solutions require substantial upfront investments in hardware, software, and maintenance. For many businesses, particularly SMEs, these costs can be prohibitive. Cloud storage offers a more affordable alternative with its pay-as-you-go model, allowing businesses to pay only for the storage they use. This eliminates the need for large capital expenditures and reduces financial risk. Furthermore, cloud storage providers manage the infrastructure, including security updates, maintenance, and backups, which significantly reduces operational costs and allows businesses to focus on their core activities. Scalability is another critical advantage of cloud storage. Businesses can easily scale their storage capacity to meet fluctuating demands, whether it's scaling up during periods of high data generation or scaling down when less storage is needed. This flexibility is essential in today's fast-paced business environment, where data needs can change rapidly. The ability to quickly and efficiently adjust storage capacity helps businesses maintain optimal performance and avoid over-provisioning, which can lead to unnecessary expenses. Moreover, cloud storage solutions often come with advanced features such as automated backups, disaster recovery, and data redundancy, ensuring data availability and reliability. These features are particularly valuable for businesses in Vietnam that may face infrastructure challenges or natural disasters. The combination of cost savings, scalability, and enhanced data management capabilities makes cloud storage an attractive option for businesses looking to optimize their operations and remain competitive in the digital age.

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Key Market Challenges

Infrastructure Development

One of the primary challenges facing the Vietnam cloud storage market is the need for significant infrastructure development. While the demand for cloud storage services is rapidly growing, especially with the increasing digitalization of businesses and the adoption of cloud-based technologies, the country's infrastructure still lags behind in terms of reliability, speed, and scalability. Addressing this challenge requires substantial investment in building robust data centers and network infrastructure across the country. Without adequate infrastructure, cloud storage providers may struggle to offer high-quality services with low latency and high availability, which are crucial for meeting the needs of businesses and consumers alike.

Moreover, navigating regulatory hurdles related to land acquisition, permits, and compliance adds complexity to infrastructure development efforts. Streamlining regulatory processes and fostering collaboration between the government and private sector can accelerate infrastructure expansion, enabling the Vietnam cloud storage market to reach its full potential.

Data Security and Privacy Concerns

Another significant challenge confronting the Vietnam cloud storage market revolves around data security and privacy concerns. As businesses increasingly rely on cloud storage solutions to store sensitive information, such as customer data, intellectual property, and financial records, ensuring the security and privacy of data becomes paramount.

One of the key issues exacerbating these concerns is the implementation of data localization regulations, which require data to be stored within the country's borders. While these regulations aim to enhance data security and promote local data sovereignty, they can pose challenges for cloud storage providers operating in Vietnam, particularly those with global infrastructures.

The rising prevalence of cyber threats, including data breaches, ransomware attacks, and insider threats, poses a significant risk to the integrity and confidentiality of data stored in the cloud. Mitigating these risks requires robust cybersecurity measures, including encryption, access controls, threat monitoring, and regular security audits.

Building trust among businesses and consumers regarding the security and privacy of cloud storage services is essential for driving adoption. Cloud storage providers must demonstrate compliance with industry standards and regulations, implement transparent data protection policies, and invest in security technologies and practices to safeguard sensitive data effectively.

In conclusion, addressing the challenges of infrastructure development and data security and privacy concerns is crucial for unlocking the full potential of the Vietnam cloud storage market. By investing in infrastructure expansion, streamlining regulatory processes, enhancing cybersecurity measures, and building trust through transparency and compliance, cloud storage providers can capitalize on the growing demand for cloud services and drive innovation in the digital economy.

Key Market Trends

Accelerated Adoption of Hybrid Cloud Solutions

One prominent trend shaping the Vietnam cloud storage market is the accelerated adoption of hybrid cloud solutions by businesses of all sizes. Hybrid cloud combines the benefits of public and private cloud environments, allowing organizations to leverage the scalability and cost-effectiveness of public cloud services while maintaining greater control over sensitive data and applications through on-premises or private cloud infrastructure.

Hybrid cloud solutions offer unparalleled flexibility and scalability, enabling businesses to dynamically allocate workloads between public and private cloud environments based on performance requirements, regulatory compliance, and cost considerations. This flexibility is particularly appealing to enterprises in Vietnam seeking to modernize their IT infrastructure while optimizing resource utilization and enhancing agility.

Another driver of hybrid cloud adoption is the need to comply with data localization regulations, which mandate that certain types of data be stored within the country's borders. By deploying hybrid cloud architectures, organizations can achieve regulatory compliance by storing sensitive data on-premises or in private cloud environments while leveraging the scalability and global reach of public cloud providers for non-sensitive workloads.

To capitalize on this trend, cloud storage providers are investing in hybrid cloud management tools and platforms that simplify deployment, orchestration, and management of hybrid environments. These tools enable seamless integration, automation, and orchestration of workloads across public and private clouds, allowing businesses to optimize performance, improve resource utilization, and enhance security posture.

Rising Demand for Data Analytics and AI-driven Insights

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Another notable trend driving growth in the Vietnam cloud storage market is the rising demand for data analytics and AI-driven insights. As businesses accumulate vast amounts of data from various sources, including IoT devices, social media platforms, and enterprise applications, there is a growing need to derive actionable insights and unlock the value of this data to drive informed decision-making and gain competitive advantage. Cloud storage solutions provide the scalable storage and processing capabilities required to handle big data analytics workloads efficiently. By leveraging cloud-based analytics platforms and services, businesses in Vietnam can analyze large datasets in real-time, uncover patterns, trends, and correlations, and extract actionable insights to drive business growth, improve operational efficiency, and enhance customer experiences. Addition to traditional analytics approaches, there is increasing adoption of AI and machine learning technologies to extract deeper insights from data, automate repetitive tasks, and enable predictive analytics capabilities. Cloud-based AI and machine learning services offer businesses in Vietnam access to advanced algorithms, pre-trained models, and scalable infrastructure to build and deploy AI-driven applications and solutions rapidly. Cloud storage providers are also developing industry-specific solutions and vertical market offerings tailored to the unique needs and challenges of various sectors in Vietnam, such as healthcare, finance, manufacturing, and retail. These solutions combine cloud storage, data analytics, and AI capabilities to address specific use cases, such as patient care optimization, fraud detection, predictive maintenance, and personalized marketing. With over 78.44 million internet users and an internet penetration rate of 79.1%, Vietnam is on its way to becoming a regional digital hub, resulting in more digital consumers and businesses. This expanded digital footprint will require enhanced cloud storage solutions to accommodate the increasing volume of data generated by internet users.

Embrace of Edge Computing and IoT Integration

The embrace of edge computing and IoT integration represents another significant trend shaping the Vietnam cloud storage market. Edge computing refers to the decentralized processing and analysis of data at the network edge, closer to the data source or end-users, rather than relying solely on centralized cloud data centers. This trend is driven by the proliferation of IoT devices, which generate massive amounts of data that require real-time processing, low latency, and bandwidth optimization.

Cloud storage providers are expanding their offerings to encompass a continuum of edge-to-cloud solutions that seamlessly integrate edge computing capabilities with centralized cloud storage and analytics services. By distributing computing resources closer to the edge of the network, businesses in Vietnam can reduce latency, improve performance, and enhance reliability for latency-sensitive applications and IoT use cases, such as smart cities, connected vehicles, and industrial automation.

Another key aspect of this trend is the emergence of edge data orchestration platforms that enable businesses to manage, process, and analyze data across distributed edge locations and centralized cloud environments seamlessly. These platforms provide tools for data ingestion, processing, storage, and analytics at the edge, as well as data synchronization, aggregation, and consolidation with cloud-based storage and analytics services.

Edge computing and IoT integration are enabling a diverse range of use cases and applications across various industries in Vietnam, including remote monitoring, predictive maintenance, asset tracking, real-time surveillance, and immersive experiences. Cloud storage providers are partnering with IoT device manufacturers, network operators, and system integrators to deliver end-to-end solutions that address specific industry challenges and unlock new opportunities for innovation and growth. The accelerated adoption of hybrid cloud solutions, rising demand for data analytics and AI-driven insights, and embrace of edge computing and IoT integration are three key trends driving growth and innovation in the Vietnam cloud storage market. By capitalizing on these trends, cloud storage providers can unlock new revenue streams, differentiate their offerings, and deliver greater value to businesses across industries in Vietnam. As of 2023, over 70% of Vietnamese businesses are integrating cloud storage solutions, marking a significant increase compared to 40% in 2020. This surge is attributed to the growing demand for scalability, cost-effectiveness, and data accessibility.

Segmental Insights

Component Insights

In 2024, the solution segment dominated the Vietnam Cloud Storage Market and is expected to maintain its dominance during the forecast period. Solutions encompass a wide range of offerings, including cloud storage infrastructure, platforms, and software applications designed to store, manage, and access data efficiently and securely in the cloud. The dominance of the solution segment can be attributed to the growing demand for cloud storage solutions among businesses of all sizes seeking to modernize their IT infrastructure, enhance data management capabilities, and leverage the scalability, flexibility, and cost-effectiveness of

cloud-based storage. Moreover, advancements in cloud technologies, such as hybrid cloud, multi-cloud, and edge computing, are driving increased adoption of cloud storage solutions to address diverse use cases and workloads, ranging from data backup and archiving to content delivery, collaboration, and analytics. Cloud storage providers are continuously innovating and expanding their solution portfolios to meet the evolving needs and requirements of customers in Vietnam, offering scalable storage options, data protection features, and integration with complementary cloud services, such as AI, analytics, and cybersecurity. Additionally, the shift towards digital transformation initiatives, remote work arrangements, and online collaboration platforms further fuels the demand for cloud storage solutions, driving market growth and sustaining the dominance of the solution segment in the Vietnam Cloud Storage Market throughout the forecast period.

Regional Insights

In 2024, South Vietnam emerged as the dominant region in the Vietnam Cloud Storage Market and is projected to maintain its dominance throughout the forecast period. The dominance of South Vietnam can be attributed to several factors, including its status as the economic hub of the country, with major cities like Ho Chi Minh City (formerly Saigon) and surrounding provinces driving economic growth, industrial development, and technological innovation. These urban centers are home to a large concentration of businesses spanning various industries, including finance, manufacturing, retail, and technology, which are increasingly adopting cloud storage solutions to modernize their IT infrastructure, enhance data management capabilities, and support digital transformation initiatives. Moreover, South Vietnam benefits from robust internet infrastructure, widespread internet penetration, and a tech-savvy population, facilitating greater access to cloud services and driving demand for cloud storage solutions among businesses and consumers alike. Furthermore, the presence of leading cloud service providers, technology vendors, and system integrators in South Vietnam contributes to the region's dominance in the cloud storage market, as these entities continue to expand their operations, invest in infrastructure, and offer innovative solutions tailored to the needs of customers in the region. Additionally, favorable government policies, initiatives to promote digitalization, and strategic investments in ICT infrastructure further support the growth of the cloud storage market in South Vietnam, reinforcing the region's position as the leading contributor to the Vietnam Cloud Storage Market landscape.

Key Market Players

- ☐☐Viettel ☐☐ CHT Company Limited
- ☐☐FPT Telecom Joint Stock Company
- ☐☐CMC Corporation
- ☐☐VNG Corporation
- ☐☐Amazon.com, Inc.
- ☐☐Microsoft Corporation
- ☐☐Alphabet Inc.
- ☐☐Alibaba Group Holding Limited
- ☐☐International Business Machines Corporation
- ☐☐SAP SE

Report Scope:

In this report, the Vietnam Cloud Storage Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

☐☐Vietnam Cloud Storage Market, By Component:

- o Solution
- o Service

☐☐Vietnam Cloud Storage Market, By Deployment Mode:

- o Public
- o Private
- o Hybrid

☐☐Vietnam Cloud Storage Market, By Organization Size:

- o Large Enterprises
- o SMEs

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☐Vietnam Cloud Storage Market, By End User Industry:

- o IT & Telecommunications
- o BFSI
- o Healthcare
- o Retail & E-Commerce
- o Manufacturing & Engineering
- o Others

☐Vietnam Cloud Storage Market, By Region:

- o North Vietnam
- o South Vietnam
- o Central Vietnam

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Vietnam Cloud Storage Market.

Available Customizations:

Vietnam Cloud Storage Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

☐Detailed analysis and profiling of additional market players (up to five).

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