

Philippines Data Center Market - Investment Analysis & Growth Opportunities 2025-2030

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Report description:

The Philippines data center market by investments is expected to grow at a CAGR of 20.89% from 2024 to 2030.

KEY HIGHLIGHTS

- Data center operators in the Philippines are procuring renewable energy for their operations. For instance, Digital Halo's data center MNL1 in Manila is designed to operate on 100% renewable energy (geothermal & wind) for its operations.
- The Philippines government offers on-the-job training (OJT) opportunities for the country's youth. Additionally, it has launched the Special Program for Employment of Students (SPES), which provides temporary jobs for college students during their summer and winter breaks.
- The Philippines is witnessing significant investment in AI-ready data centers. For instance, in December 2024, ePLDT is planning to construct a new AI-ready hyperscale data center in South Luzon with a power capacity of around 100 MW.
- The Philippines is advancing quickly in digitalization, with strong support from the government on digital transformation and the business sector's efforts to enhance operations, customer engagement, and productivity. A survey commissioned by Alibaba revealed that 85% of Philippines businesses intend to undergo a comprehensive cloud migration by the end of 2026.
- With the development of AI-ready data centers in the market, the demand for liquid cooling solutions is also expected to grow. Digital Edge's NARRA1 data center facility has invested in StatePoint Liquid Cooling Systems.

WHY SHOULD YOU BUY THIS RESEARCH?

- Market size available in the investment, area, power capacity, and Philippines colocation market revenue.
- An assessment of the data center investment in the Philippines by colocation, hyperscale, and enterprise operators.
- Data center investments in the area (square feet) and power capacity (MW) across cities in the country.
- A detailed study of the existing Philippines data center market landscape, an in-depth industry analysis, and insightful predictions

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about the Philippines data center market size during the forecast period.

- Snapshot of existing and upcoming third-party data center facilities in the Philippines

- o□Facilities Covered (Existing): 22

- o□Facilities Identified (Upcoming): 11

- o□Coverage: 7+ Cities

- o□Existing vs. Upcoming (Data Center Area)

- o□Existing vs. Upcoming (IT Load Capacity)

- Data center colocation market in the Philippines

- o□Colocation Market Revenue & Forecast (2021-2030)

- o□Retail & Wholesale Colocation Pricing

- The Philippines data center landscape market investments are classified into IT, power, cooling, and general construction services with sizing and forecast.

- A comprehensive analysis of the latest trends, growth rate, potential opportunities, growth restraints, and prospects for the market.

- Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the industry.

- A transparent research methodology and the analysis of the demand and supply aspects of the market.

VENDOR LANDSCAPE

- The Philippines data center market has a presence of several global support infrastructure providers that will increase its competitiveness in the market. Some of the support infrastructure vendors present in the Philippines data center market include ABB, Caterpillar, Cummins, Eaton, Fuji Electric, Legrand, Mitsubishi Electric, Rolls-Royce, Vertiv, and others.

- Some of the key colocation data center investors in the Philippines data center market include ST Telemedia Global Data Centres, ePLDT, Converge ICT, Digital Edge, DITO Telecommunity, and others.

- The Philippines data center market has several local and global construction contractors operating in the market including Arup, Aurecon, Comfac, Data Center Design Corporation (DCDC), JSLA Architects, PRONET, Mace, Red Engineering, Design Coordinates, and others that have been offering their services in the market. For instance, Design Coordinates joined hands with JSLA Architects to offer their services in constructing the YCO Cloud data center, located in the Light Industry and Science Park IV in Malvar, Batangas.

EXISTING VS. UPCOMING DATA CENTERS

- Existing Facilities in the Region (Area and Power Capacity)

- o□Manila

- o□Other Cities

- List of Upcoming Facilities in the Region (Area and Power Capacity)

- o□Manila

- o□Other Cities

REPORT COVERAGE:

This report analyses the Philippines data center market share. It elaboratively analyses the existing and upcoming facilities and investments in IT, electrical, mechanical infrastructure, general construction, and tier standards. It discusses market sizing and investment estimation for different segments. The segmentation includes:

- IT Infrastructure

- o□Servers

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- o□PDUs
- o□Other Electrical Infrastructure
- Mechanical Infrastructure
- o□Cooling Systems
- o□Rack Cabinets
- o□Other Mechanical Infrastructure
- Cooling Systems
- o□CRAC & CRAH Units
- o□Chiller Units
- o□Cooling Towers, Condensers & Dry Coolers
- o□Other Cooling Units
- General Construction
- o□Core & Shell Development
- o□Installation & Commissioning Services
- o□Engineering & Building Design
- o□Fire Detection & Suppression Systems
- o□Physical Security
- o□Data Center Infrastructure Management (DCIM)
- Tier Standard
- o□Tier I & Tier II
- o□Tier III
- o□Tier IV

VENDOR LANDSCAPE

IT Infrastructure Providers

- Atos
- Broadcom
- Cisco Systems
- Dell Technologies
- Fujitsu
- Hewlett Packard Enterprise
- Huawei Technologies
- IBM
- Lenovo
- NetApp
- Oracle

Data Center Construction Contractors & Sub-Contractors

- Arup
- Aurecon

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- Comfac
- Data Center Design Corporation (DCDC)
- First Balfour
- Gensler
- SLA Architects
- Leighton Asia (CIMIC Group)
- PRONET
- Mace
- Red Engineering
- Syska Hennessy Group
- Thornton Tomasetti
- Design Coordinates

Support Infrastructure Providers

- ABB
- Caterpillar
- Cummins
- Cyber Power Systems
- Eaton
- Fuji Electric
- KOHLER
- Legrand
- Mitsubishi Electric
- Rolls-Royce
- Schneider Electric
- Vertiv
- ZTE

Data Center Investors

- Beeinfotech
- Converge ICT
- Digital Edge
- DITO Telecommunity
- ePLDT
- ST Telemedia Global Data Centres & Globe Telecom

New Entrants

- AyalaLand Logistics Holdings & FLOW Digital Infrastructure
- Digital Halo
- EdgeConneX
- Equinix
- Megawide Construction Corporation
- YCO Cloud

KEY QUESTIONS ANSWERED:

- 1.□How big is the Philippines data center market?

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2. □What is the growth rate of the Philippines data center market?
3. □How many existing and upcoming data center facilities exist in the Philippines?
4. □How much MW of power capacity will be added across the Philippines during 2025-2030?
5. □What factors are driving the Philippines data center market?
6. □Who are the key investors in the Philippines data center market?

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