

Philippines Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Philippines Data Center Market size is estimated at 497.18 MW in 2024, and is expected to reach 954.22 MW by 2029, growing at a CAGR of 13.93% during the forecast period (2024-2029).

Tier 3 data center accounted for majority share in terms of volume in 2023, Tier 4 is fastest growing through out the forecasted period

Growth in the tier 1 segment is expected to be stagnant due to the unreliability and longer downtimes of facilities. The IT load capacity of the tier 2 segment is expected to increase from 125.6 MW in 2021 to 172.6 MW by 2029 at a CAGR of 4.33%. These data centers are preferred mainly by small businesses due to the performance they offer at an affordable cost. However, a downtime of 22 hours annually, at times, makes companies reluctant and hesitant to opt for them.

The IT load capacity of the tier 3 segment of the data center market in the Philippines is anticipated to increase from 78.3 MW in 2021 to 489.3 MW by 2029 at a CAGR of 25.75%. These data centers offer an uptime of 99.98% with N+1 redundancies, and they only have around 1.6 hours of downtime in a year. These advantages have made them highly preferable by large businesses.

Currently, tier 3 data centers are highly prevalent in the region, as some facilities have upgraded their structures and services to the required standards. Operators prefer newly constructed facilities to be tier 3 and tier 4 ready.

The IT load capacity of the tier 4 segment of the data center market in the Philippines is expected to reach 70 MW by 2029. These data centers are expected to be operational in 2023 and are preferred due to their high reliability and lower downtime of around 26.3 minutes. Currently, the Philippines has no colocation facility with Tier 4 certification. However, ePLDT announced that its 11th data center in Santa Rosa would be tier 4 and would be launched by 2023.

Operators of new data centers prefer Tier 4 grade certifications for their infrastructure facilities due to the high reliability offered.

Philippines Data Center Market Trends

Philippines consumers spend 10hr/day on smartphone, generating huge amount of data transfer daily, this would drive data center market

The Philippines had around 101 million smartphone users in 2022, which is expected to reach 181 million by 2029 at a CAGR of 8.79%.

Post-pandemic, the demand for smartphones has significantly increased as they turned out to be 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. The convenience of doing almost everything instantly has increased the number of users and is expected to increase with the increasing population.

The Philippines is the only country in the world where users, on average, spend an average of 10 hours a day on the phone. As the telecom network developed and improved its facilities, users could attain good mobile data speeds on their smartphones which increased their functionality and experience. Online games on mobile have improved their quality, and the events organized by them have furthermore increased the demand for smartphones. As phones with higher processors, better displays, and batteries are available at a budget price. 74% of the users prefer mobile gaming over PC and console gaming.

Expansion of 5G network by mobile operators such as DITO, Globe, and Smart boost the data center market

Consumers in the Philippines currently use 4G and 3G services in greater proportion. 5G network services were launched at the end of 2021 and were increasingly adopted by customers in the first quarter of 2022.

Facilities offering 5G services in the Philippines are DITO, Globe, and Smart. These companies are expanding their bases to strengthen their network connectivity.

For instance, Smart increased the count of its 5G substations to 7300 in 2022 to strengthen its 5G networks.

Philippines Data Center Industry Overview

The Philippines Data Center Market is moderately consolidated, with the top five companies occupying 47.67%. The major players in this market are Epldt Inc, GTI Corporation, NTT Ltd., STT GDC Pte Ltd and Zenlayer Inc (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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