

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

<https://marketpublishers.com/r/P25B6594EBADEN.html>

Date: July 2024

Pages: 90

Price: US\$ 4,750.00 (Single User License)

ID: P25B6594EBADEN

Abstracts

The Philippines Data Center Power Market size is estimated at USD 411.5 million in 2024, and is expected to reach USD 754.20 million by 2029, growing at a CAGR of 12.49% during the forecast period (2024-2029).

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.

Key Highlights

Under Construction IT Load Capacity: The upcoming IT load capacity of the Philippine data center market is expected to reach 954.2 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 5.3 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach 266,405 units by 2029. NCR is expected to house the maximum number of racks by 2029.

Planned Submarine Cables: There are close to 40 submarine cable systems connecting the Philippines, and many are under construction. One such submarine cable that is estimated to start service in 2024 is Apricot, which stretches over 11,972 km from Baler to Davao.

The government is considering using power-saving measures such as subsidies to increase energy efficiency or productivity and move toward a low-carbon system to solve the electricity problem and crisis. In support of such policies and to reduce energy consumption, key market players are focusing on introducing efficient power management systems such as PDUs, busways, and UPS for the purpose of controlling unnecessary expenditures in data centers, which is expected to increase market growth.

Philippines Data Center Power Market Trends

The IT & Telecom Segment is Expected to Hold a Significant Market Share

The BFSI and cloud segments are expected to grow proportionally, followed by other end users such as telecom, government, e-commerce, and media & entertainment.

The IT load capacity of the BFSI segment is expected to register a CAGR of 15.18% during the forecast period, increasing from 39.7 MW in 2022 to 86.8 by 2029. As of 2021, the IT load capacity of the segment was 21.2 MW.

With online gaming and streaming content services gaining traction in the Philippine market, the media & entertainment segment is expected to increase its data consumption from 41.4 MW in 2022 to 109.9 MW by the end of the forecast period, recording a CAGR of 14.97%.

Manufacturing and healthcare are also expected to grow in the future. The implementation of Industry 4.0 standards is expected to automate the end-user industries and generate huge amounts of data.

The manufacturing segment's consumption is expected to increase from 6.5 MW in 2022 to 11.6 MW by 2029, recording a CAGR of 8.5%. Though the healthcare segment is at the nascent stage, it is expected to grow due to its high potential in the near future.

Monitored PDUs Hold a Significant Share in the Market

Monitored rack PDUs are essential components in data center and server room infrastructure, providing real-time monitoring of power usage, voltage, current, and other electrical parameters. This data helps administrators make informed decisions about

power allocation and capacity planning.

By tracking power usage trends, administrators can plan for future growth and ensure that power capacity is not exceeded, preventing overloads that could lead to equipment failures. Also, it helps identify inefficiencies and optimize energy usage. This can lead to cost savings and a reduced environmental footprint by eliminating unnecessary power consumption. Also, it allows administrators remote access and control, reducing the need for physical presence and minimizing operational disruptions.

Increasing focus on digitalization, internet penetration, and e-commerce sales across the country creates more need for storage facilities, resulting in huge demand for data centers and a rise in power consumption. The increased demand for data storage has led to the deployment of intelligent power distribution units (PDUs) against simple multi-socket rack installations with server and network equipment, which optimize power consumption in data centers.

Because of the advancements mentioned with monitored PDUs and the necessity to reduce electricity consumption as per government measures in the country, key market players are focusing on introducing efficient power management systems. In May 2023, Eaton, which provides power management services, launched G3 Universal Input Rack PPDUs with dynamic C39 outlets capable of accommodating different plug configurations and input voltage requirements. To meet the most diverse data center rack power requirements, G3UPDU added new features.

There are five mega-sized data centers under construction. The major players involved in the mega-size data center segment are Globe+STT GDC+ Ayala Corporation (Karmanedge Inc.) and Diode Ventures + Endec Group +B&V. The IT load capacity under construction is more than 200 MW.

Philippines Data Center Power Industry Overview

The Philippine data center power market is highly concentrated, with the presence of multiple vendors. Players are adopting several strategies, such as mergers and acquisitions (M&A), collaborations, partnerships, etc. Various initiatives are being undertaken by governmental bodies as well as private data center construction, creating intense competition. Key players in the market include Schneider Electric SE, ABB Ltd, Rittal GmbH & Co. KG, Fujitsu Limited, and Legrand Group.

March 2024: Schneider Electric announced its expansion of US manufacturing facilities at two locations to support critical infrastructure of data centers and other industries. The company plans to manufacture electrical switchgear and medium-voltage power distribution products at both locations.

February 2024: Enlogic, a significant provider of power products, announced two new PDUs to its extensive iPDU product line: Horizontal & Vertical high AMP PDUs. They included a High Amp Vertical PDU with combination and locking combination outlet and a Horizontal high Amp PDU (100/125A) with combination and locking combination outlets of C13/C15 and C13/C15/C19/C21, offering versatility and flexibility.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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