

## Twitter Thread by Brian Coughlin



**Brian Coughlin**

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In 2021, \$BABA increased their cloud infrastructure market share to ~38%, stealing market share from \$TCEHY & Huawei who have ~17% share each.

The cloud industry in China is forecasted to grow at >30% CAGR into 2025.

CIW

### China cloud infrastructure service spend in Q3 2021

