

Southeast Asia Data Center Construction Market - Industry Outlook & Forecast 2025-2030

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Report description:

The Southeast Asia data center construction market by investment is expected to grow at a CAGR of 13.82% from 2024 to 2030.

SOUTHEAST ASIA DATA CENTER CONSTRUCTION MARKET KEY HIGHLIGHTS

- The Southeast Asia data center market is booming due to the demand from hyperscale companies, the need for Artificial Intelligence (AI), the growth of edge computing, rapid digitalization, and the adoption of cloud-based services. To keep up with the AI demands, data center operators are adjusting their infrastructure and coming up with innovative cooling and energy solutions. All such factors collectively are projected to support the Southeast Asia data center construction market growth.
- High demand for data center capacity was fueled by hyperscale companies, banks, and other institutions, which account for an unprecedented power capacity volume in the market.
- The Southeast Asian governments will promote data center investments through various initiatives such as increasing the availability of land for development, reducing electricity tariffs, offering tax incentives, and enabling the procurement of renewable energy, such as solar power agreements and others. Such initiatives will drive the Southeast Asia data center construction market growth during the forecast period.
- Digitalization across businesses will contribute to a surge in data center investments by colocation, cloud, internet, and telecommunication providers. Telecom companies include Telekom Malaysia, Telkomsel, Telkom Indonesia, Singtel, and many more.
- The Malaysian data center market is becoming competitive. It is witnessing the entry of several colocation and hyperscale operators developing data center facilities.
- The core submarkets are witnessing land and power constraints, limiting the opportunities for new companies to enter the Southeast Asia data center construction market. But the adoption of new methods to combat such restraints includes renewable energy sources and techniques.
- Supportive government initiatives and strategies are implemented across all countries to attract more investments flowing to the

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region. A few of them are the Green Roadmap, AI strategies, Smart Nation, and many more.

SEGMENTATION INSIGHTS

- The use of modular power infrastructure in data centers is expected to result in cost savings over time. These systems are more efficient, leading to space savings and the need for less maintenance.
- Hyperscalers are investing in many data centers with solar purchase agreements to deal with efficient use and reduce their carbon footprint in data facilities.
- The use of HVO fuel as a substitute for diesel fuel in generators is expected in the Southeast Asia data center construction market due to its sustainability. Several operators are replacing diesel fuel with HVO fuel to power their backup generators.
- The real-time monitoring software DCIM/BMS solutions with automation and AI features are growing in significance. This technology can predict maintenance needs and physical security, identify component failures, and perform automatic switchovers to ensure uninterrupted operations.
- Several new and innovative power and cooling systems have been introduced in the market, with a major focus on sustainability. Infrastructure providers are focusing more on the development of products with reduced environmental impact.
- The use of cooling techniques such as liquid cooling and air cooling is on the rise in regions with favorable climates to effectively cool data centers.

-□Facility Type

- o□Hyperscale Data Centers

- o□Colocation Data Centers

- o□Enterprise Data Centers

-□Support Infrastructure

- o□Electrical Infrastructure

- o□Mechanical Infrastructure

- o□General Construction

-□Electrical Infrastructure

- o□UPS Systems

- o□Generators

- o□Transfer Switches & Switchgear

- o□PDUs

- o□Other Electrical Infrastructure

-□Mechanical Infrastructure

- o□Cooling Systems

- o□Racks

- o□Other Mechanical Infrastructure

-□Cooling Systems

- o□CRAC & CRAH Units

- o□Chiller Units

- o□Cooling Towers, Condensers & Dry Coolers

- o□Other Cooling Units

-□Cooling Techniques

- o□Air-based Cooling Technique

- o□Liquid-based Cooling Technique

-□General Construction

- o□Core & Shell Development

- o□Installation & Commissioning Services

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- o□Engineering & Building Design
- o□Fire Detection & Suppression
- o□Physical Security
- o□DCIM/BMS
- Tier Standard
- o□Tier I & II
- o□Tier III
- o□Tier IV

SOUTHEAST ASIA DATA CENTER CONSTRUCTION MARKET'S GEOGRAPHICAL ANALYSIS

- Malaysia is considered to have a lot of data center investments due to the concentration of data center facilities by companies. The market has the presence of all the major colocation and hyperscale data center operators. Johor City in Malaysia is seeing the most inflows of investments in facilities due to the city's favorable land conditions, government schemes, and others.
- Singapore is considered the largest data center market in the region, with major international companies with their data centers.
- Thailand is poised to become another major data center hub in Southeast Asia after Malaysia and Indonesia. Bangkok is among the preferred locations by data center operators in the country.
- The market is preferred by the major colocation and hyperscale operators owing to strong connectivity, renewable energy options, and tax incentives.
- In Indonesia, cities such as Jakarta and Yogyakarta are considered by many colocation players. Although Indonesia and the Philippines are more prone to natural disasters, data centers might take a toll due to these situations, despite innovative solutions such as cloud, backup generators, power supply, and others being implemented in the data centers to avoid any difficulty. Thus, the majority setup is to maintain the connectivity by the telecommunications companies in the data centers.
- Vietnam is growing slowly as a potential market for data centers as recently its government announced the opening of the data center market to foreign investors, which would attract international players to establish their centers and services. Cities such as Ho Chi Minh, Hanoi, and Da Nang have seen positive data center establishments in the past.
- In other Southeast Asian countries such as Cambodia, Brunei, Laos, and Myanmar, the data center market is slowly booming with a few investments in the telecommunications sector. The government has introduced a few attractive schemes to promote the data center market.
- The data center construction and expansion activities are estimated to take place primarily in the large-scale colocation facilities.

- Geography
- Southeast Asia
 - o□Singapore
 - o□Malaysia
 - o□Indonesia
 - o□Thailand
 - o□Philippines
 - o□Vietnam
 - o□Other Southeast Asia Countries

SOUTHEAST ASIA DATA CENTER CONSTRUCTION MARKET VENDORS

- The Southeast Asia data center construction market has the presence of all the major global colocation operators, including Equinix, Digital Realty, AirTrunk, Keppel Data Centres, NTT DATA, ST Telemedia Global Data Centres, Princeton Digital Group, Bridge Data Centres, and others.
- Major hyperscale operators investing in the Southeast Asia data center construction market include Amazon Web Services (AWS),

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Microsoft, Meta (Facebook), and Google. They are expanding their presence across all the top data center destinations in Southeast Asia.

- The Southeast Asia data center construction market witnessed the entry of several new players such as CtrlS Data Centers, STACK Infrastructure, Edgnet Data Centres by DAMAC, CloudHQ, Doma Infrastructure Group, NEXTDC, Yondr, and other operators.
- The entry of new operators is likely to disrupt the market share and presence in a particular market, leading to growth in competition.
- Despite the major operators' presence, several new companies are developing significant data center campuses in Singapore and Malaysia.
- Several data center operators are launching their specific data center entity and separating it from the core business. For instance, Actis launched a new data center business called Epoch Digital. Similarly, Singtel also launched its separate data center entity classed as Nxera.
- The rising demand for data centers across the country will provide significant opportunities for construction contractors to generate revenue. Some of the well-known construction contractors in this field include Arup, Aurecon Group, CSF Group, DSCO Group, Gammon Construction, NTT Facilities, PM Group, and Studio One Design.

Key Data Center Support Infrastructure Provider

- ABB
- Caterpillar
- Cummins
- Eaton
- Rittal
- Schneider Electric
- STULZ
- Vertiv

Other Data Center Support Infrastructure Providers

- Airedale
- Alfa Laval
- Canovate Group
- Cyber Power Systems
- Delta Electronics
- EAE Group
- Envicool
- Fuji Electric
- Green Revolution Cooling
- HITEC Power Protection
- Rehiko (Kohler Power)
- Legrand
- Mitsubishi Electric
- Narada
- Nortek Air Solutions
- Piller Power Systems
- Rolls-Royce
- Siemens
- Socomec Group

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-[]Trane

Prominent Construction Contractors

- []Arup
- []Aurecon Group
- []CSF Group
- []DSCO Group
- []Gammon Construction
- []Meinhardt Group
- []NTT Facilities
- []PM Group
- []Studio One Design
- []THAI KAJIMA

Other Prominent Construction Contractors

- []AtkinsRealis
- []AWP Architects
- []Apave
- []Architects 49
- []Asima Architects
- []AVO Technology
- []CCIE Engineering
- []Chaan
- []Comfac
- []Corgan
- []Critical Holdings Berhad
- []Data Center Design Corporation (DCDC)
- []DPR Construction
- []Finishing Touch Design Studio
- []First Balfour
- []Fortis Construction
- []Greatians Consulting
- []Gensler
- []GreenViet
- []ISG
- []Kienta Engineering Construction
- []Leighton Asia
- []Linesight
- []LSK Engineering
- []Mace
- []M+W Group
- []Meg Consult
- []MN Holdings
- []Nakano Corporation
- []PKT Quantity Surveyors

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- Plan Architect
- PMX Malaysia
- Powerware Systems
- Obayashi Corporation
- Sato Kogyo
- Sunway Construction Group
- RDC Arkitek
- Red Engineering
- Turner & Townsend
- Thornton Tomasetti

Prominent Data Center Investors

- AirTrunk
- Amazon Web Services
- Bridge Data Centres
- DayOne (GDS Services)
- DCI Indonesia
- Digital Realty
- ePLDT
- Equinix
- Google
- Keppel Data Centres
- Microsoft
- NTT DATA
- Princeton Digital Group
- ST Telemedia Global Data Centres
- Telkom Indonesia
- Viettel IDC

Other Prominent Data Center Investors

- AIMS Data Centre
- Beeinfotech
- Big Data Exchange (BDx Data Centers)
- Bitera Data Center
- Biznet Data Center
- Converge ICT Solutions
- CMC Telecom
- Datacomm Diangraha
- Digital Edge DC
- DITO Telecommunity
- EdgeConneX
- Empyrion Digital
- Epsilon Telecommunications
- Etix Everywhere
- FPT Telecom

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- Google
- Hanoi Telecom
- Meta
- MettaDC
- Nxera
- OneAsia Network
- Open DC
- Pure DC
- SM+
- SUPERNAP Thailand
- Telehouse
- Tencent Cloud
- True IDC
- VADS
- Vantage Data Centers
- VNPT
- VNTT
- YTL Data Center Holdings

New Entrants

- AyalaLand Logistics Holdings & FLOW Digital Infrastructure
- BRIGHTRAY
- BW Digital
- CloudHQ
- CtrlS Datacenters
- Digital Halo
- Doma Infrastructure
- Edgnex Data Centres by DAMAC
- Epoch Digital
- Evolution Data Centres
- Future Data
- Gaw Capital
- i-Berhad
- Infinaxis Data Centre Holdings
- Infracrowd Capital
- K2 STRATEGIC
- Megawide Construction Corporation
- Minoro Energi
- Nautilus Data Technologies
- NEXTDC
- Regal Orion
- STACK Infrastructure
- SEAX Global
- YCO Cloud
- Yondr Group

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KEY QUESTIONS ANSWERED:

1. How big is the Southeast Asia data center construction market?
2. What is the growth rate of the Southeast Asia data center construction market?
3. What is the estimated market size in terms of area in the Southeast Asia data center construction market by 2030?
4. What are the key trends in the Southeast Asian data center construction market?
5. How many MW of power capacity is expected to reach the Southeast Asia data center construction market by 2030?

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