Southeast Asia Data Center Market Landscape 2025-2030

Market Report | 2025-06-03 | 221 pages | Arizton Advisory & Intelligence

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Report description:

The Southeast Asia data center market size by investment is expected to grow at a CAGR of 14.23% from 2024 to 2030.

KEY TRENDS

Expanding Sustainability Initiatives Will Drive Southeast Asia Data Center Market Growth

- The Southeast Asia region continues to adopt sustainable practices in data centers to adhere to regulatory requirements and contribute to environmental goals. Malaysia has favorable conditions for renewable energy generation, such as the presence of solar and hydropower, which is why the data center investors in the country focus more on sustainability. The Thai government has unveiled its ambition to surpass a 30% increase in renewable energy supply by 2037. Furthermore, the nation aims to achieve carbon neutrality by 2050. As an action plan to achieve these targets, the criteria for the Utility Green Tariff (UGT) were officially published in Thailand's Royal Gazette in January 2024.
- Operators in the Southeast Asia data center market continue to shift toward sustainability. Hyperscale operators such as Google and Microsoft have signed PPAs to shift to renewable energy in the data center facilities of the region. 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.
- In September 2024, Microsoft signed a power purchase agreement to procure solar power in Singapore. It is a 20-year contract with the company which will be held 100% by the cloud provider of renewable energy with 200 MW power capacity.
- In July 2024, AIMS Data Centre launched its first data center in Kuala Lumpur. This new site is set to offset energy use via hydroelectric renewable energy from Sarawak Energy Berhad.
- In June 2024, Etix Everywhere announced the deployment of solar power to achieve 100% renewable energy by 2025. It has deployed solar panels over 6,000 square feet and solar power production accounts for 11% of the total energy consumption of data centers.
- In April 2024, Viettel IDC opened a data center in Hoa Lac tech park in Hanoi city. The data center has more than 2,400 racks, and it is designed to meet rising AI demand and is the largest data facility in the country. This facility is committed to using 30% renewable energy for energy consumption.

Rising Investments by Hyperscale Operators and Expansion by Colocation Operators

- The Southeast Asia data center market is driven by increased investments from colocation providers and hyperscale operators. This is due to the rise in internet users, adoption of cloud services, smartphone penetration, and the need for businesses to shift from server room setups. The major operators in the region are AWS, Meta, Google Cloud, and Microsoft.
- In October 2024, Microsoft announced the opening of a data center in Thailand to boost cloud services and AI in the country. Microsoft also announced an investment plan worth USD 1.7 billion in AI and cloud data centers in Indonesia.
- In September 2024, Google declared plans for an investment of USD 1 billion in Thailand's data centers in Bangkok and Chonburi cities. The investment is planned to be spent from 2025 to 2029.
- In August 2024, Google announced its plans to open a hyperscale data center in Ho Chi Minh City, Vietnam. The data facility is likely to be ready by 2027.
- In July 2024, Oracle Cloud launched its second cloud region in Singapore. This decision was due to the rising demand for AI and cloud services.
- In July 2024, Equinix acquired three data centers in the Philippines from Total Information Management to expand its presence in Southeast Asia. This strategic move is because of the region's strong growth potential, tech-savvy population, inexpensive land and labor, and favorable policies.
- In March 2024, NTT DATA announced the construction of its new data center in Bangkok, Thailand, worth USD 90 million. This facility is likely to operate from the second half of 2025.

SOUTHEAST ASIA DATA CENTER MARKET SEGMENTATION INSIGHTS

- The Southeast Asia data center market, particularly in terms of IT infrastructure, is primarily witnessing the use of switches with up to 40GbE ports. With the development of cloud data centers, the adoption of switches with ports varying from 25?100 GbE across multiple layers of the data center architecture will increase. Additionally, with the growing need for sophisticated infrastructure, the uptake of flash storage devices and blade servers is expected to rise in the forecast period.
- In the upcoming years, the need for generators in data centers will be high, despite generators being the major contributors to carbon emissions.
- In the Jakarta facility of IndoKeppel Data Centres, there are dedicated backup generators: 6 units of 2,000 kVA for IT, along with 2 units of 2,500 kVA and 2 units of 1,500 kVA.
- The Southeast Asia data center market is poised to see ongoing adoption of liquid cooling techniques. In data centers, liquid-based cooling techniques consist of chilled-water-based cooling, direct liquid cooling, and immersion cooling techniques. For instance, Digital Realty installed liquid-cooled servers in its SIN11 data center in Singapore. This reduces up to 29% of power consumption. Also, Keppel Data Centres and Salim Group's IKDC 1 data center facility have a water-based cooling technique with N+1 redundancy.

GEOGRAPHICAL ANALYSIS

- The Southeast Asia data center market region is poised for significant growth, driven by the emergence of Malaysia, Indonesia, Thailand, and Vietnam as promising investment destinations.
- Malaysia has emerged as the top investment destination in the Southeast Asia data center market over recent years, owing to factors like land constraints in neighboring countries like Singapore, availability of cheaper land and power, and favorable regulatory landscape for data centers.
- Indonesia consists of more than 14 cloud zones operated by cloud providers like Alibaba Cloud, Amazon Web Services, Google Cloud, Huawei Cloud, Microsoft Azure, and Tencent Cloud.
- Despite being a smaller market in comparison with other Southeast Asian countries like Vietnam is also speeding up to seize opportunities from AI in terms of data center expansion.

-Data center investments in Singapore have slowed down in recent years due to the moratorium on data center construction. However, after the lifting of the moratorium in 2022, the market has started receiving investments.
-The data center investments in Indonesia are concentrated in major cities, due to inadequate network infrastructure and unstable power supply in rural areas. Most of the existing data center projects are concentrated in the Greater Jakarta region.
-Thailand is gradually emerging as a key data center market in Southeast Asia, owing to its strategic location, robust power grid, and progressive government policies. The government actively supports this digital growth by implementing measures such as tax incentives and simplified permit processes for data centers, creating a favorable environment for the booming digital economy.

SOUTHEAST ASIA DATA CENTER MARKET VENDOR LANDSCAPE

-The Southeast Asia data center market has the presence of IT infrastructure providers such as Arista Networks, Atos, Broadcom, Cisco, Dell Technologies, Hewlett Packard Enterprise, Huawei Technologies, IBM, Inspur, Intel, Lenovo, MiTAC Holdings, NetApp, Quanta Cloud Technology, Toshiba, Wiwynn, and others that are driving the availability of advanced IT infrastructure in the market.
-The Southeast Asia data center market has a presence of several regional and global contractors and subcontractors, such as Apave, Architects 49, Arup, AtkinsRealis, Asima Architects, AWP Architects, Aurecon, Avo Technology, China Construction Industrial & Energy Engineering Group, Chaan, Comfac, Corgan, Critical Holdings Berhad, CSF Group, DPR Construction, DSCO Group, Fortis Construction, Gammon Construction, Gensler, ISG, Kienta Engineering Construction, Linesight, LSK Engineering, Mace, M+W Group, Meinhardt Group, MN Holdings, NTT Facilities, Obayashi Corporation, PM Group, Plan Architect, Powerware Systems, Red Engineering, Studio One Design, THAI KAJIMA, Turner & Townsend, and others.
Key Data Center IT Infrastructure Providers
-Arista Networks
-Atos
-Broadcom
-Cisco
-Dell Technologies
-Hewlett Packard Enterprise
-Huawei Technologies
-IBM
-Inspur
-Lenovo
-MiTAC Holdings
-NetApp
-Quanta Cloud Technology
-Toshiba
-Western Digital
-Wiwynn
-Others

Key Data Center Support Infrastructure Providers
-ABB
-Fuji Electric
-Envicool
-Airedale
-Alfa Laval
-Caterpillar

- Canovate Group
- Cummins
- Cyber Power Systems
- Delta Electronics
- EAE Group
- Eaton
- Green Revolution Cooling
- HITEC Power Protection
- Legrand
- Mitsubishi Electric
- Narada
- Nortek Air Solutions
- Piller Power Systems
- Rittal
- Rolls-Royce
- Schneider Electric
- Siemens
- Socomec Group
- STULZ
- Trane
- Vertiv
- Others

Key Data Center Contractors & Subcontractors

- Arup
- AtkinsRealis
- Asima Architects
- AWP Architects
- Aurecon
- Avo Technology
- China Construction Industrial & Energy (CCIE) Engineering Group
- Chaan
- Comfac
- Corgan
- Critical Holdings Berhad
- CSF Group
- DPR Construction
- Data Center Design Corporation (DCDC)
- DSCO Group
- Finishing Touch Design Studio
- First Balfour
- Fortis Construction
- Gammon Construction
- Gensler
- Greatians Consulting
- GreenViet

- ISG
- Kienta Engineering Construction
- Leighton Asia
- Linesight
- LSK Engineering
- Mace
- Meg Consult
- M+W Group
- Meinhardt Group
- MN Holdings
- Nakano Corporation
- NTT Facilities
- Obayashi Corporation
- PM Group
- PKT Quantity Surveyors
- Plan Architect
- PMX Malaysia
- Powerware Systems
- Regional Development Consortium (RDC) Architects
- Red Engineering
- Sato Kogyo
- Studio One Design
- Sunway Construction Group
- THAI KAJIMA
- Thornton Tomasetti
- Turner & Townsend
- Others

Key Data Center Investors

- AirTrunk
- AWS
- AIMS Data Centre
- Beeinfotech
- BDx Data Centers
- Bitera Data Centers
- Biznet Data Centers
- Bridge Data Centres
- Converge ICT Solutions
- CMC Telecom
- Datacomm Diangraha
- DayOne
- Digital Edge DC
- DITO Telecommunity
- Digital Realty
- DCI Indonesia
- EdgeConneX

- Empyrion Digital
- Epsilon Telecommunications
- ePLDT
- Equinix
- Etix Everywhere
- FPT Telecom
- Google
- Hanoi Telecom
- Keppel Data Centres
- Meta
- MettaDC
- Microsoft
- NTT DATA
- Nxera
- OneAsia Network
- Open DC
- Princeton Digital Group
- Pure DC
- SM+
- ST Telemedia Global Data Centres
- SUPERNAP Thailand
- Telehouse
- Tencent Cloud
- Telkom Indonesia
- VADS (Telekom Malaysia)
- Vantage Data Centers
- Viettel IDC
- VNPT
- VNTT
- YTL Data Center Holdings
- Others

The report includes the investment in the following areas:

Segmentation by Facility Type

- Hyperscale Data Centers
- Colocation Data Centers
- Enterprise Data Centers

Segmentation by Infrastructure

- IT Infrastructure
- Electrical Infrastructure
- Mechanical Infrastructure
- General Construction

Segmentation by IT Infrastructure

- Server Infrastructure
- Storage Infrastructure

- Network Infrastructure

Segmentation by Electrical Infrastructure

- UPS Systems
- Generators
- Transfer Switches & Switchgear
- Power Distribution Units
- Other Electrical Infrastructure

Segmentation by Mechanical Infrastructure

- Cooling Systems
- Racks
- Other Mechanical Infrastructure

Segmentation by Cooling Systems

- CRAC & CRAH Units
- Chiller Units
- Cooling Towers, Condensers, and Dry Coolers
- Other Cooling Units

Segmentation by Cooling Techniques

- Air-based
- Liquid-based

Segmentation by General Construction

- Core & Shell Development
- Installation & Commissioning Services
- Engineering & Building Design
- Physical Security
- Fire Detection & Suppression
- DCIM/BMS

Segmentation by Tier Standard

- Tier I & II
- Tier III
- Tier IV

Segmentation by Geography

- Southeast Asia

o Singapore
o Indonesia
o Malaysia
o Thailand
o Philippines
o Vietnam
o Rest of Southeast Asia Countries

KEY QUESTIONS ANSWERED:

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

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