



Asia Pacific's Data Centre Development Pipeline Hits Record 19.4GW in 2025

- *Southeast Asia holds the largest share of under-construction capacity at 31%*
- *AI-driven workloads reshape development priorities and accelerate hyperscale delivery across region*

SINGAPORE, 27 March, 2026 – Asia Pacific's (APAC) data centre market is entering a new phase of large-scale execution, with the region's development pipeline reaching a record 19.4 gigawatts (GW) in 2025. This expansion reflects deep, committed hyperscale demand and accelerated investment in AI-ready, power-dense infrastructure across key markets in the region.

APAC's development momentum is underpinned by 3.7GW of active construction and a further 15.7GW in planning, with Southeast Asia (SEA) accounting for the largest share of under-construction capacity at 31%, according to Cushman & Wakefield's [APAC Data Centre H2 2025 Update](#). Strong hyperscale activity in Malaysia, Thailand and Indonesia continues to anchor this growth, positioning APAC for a significant delivery cycle in 2026 as cloud and AI platforms expand their deployment footprints across the region.

"Asia Pacific's data centre market is in delivery mode," said **Andrew Green, Head of Data Centre Group, Asia Pacific**. "We're seeing AI-ready capacity delivered at unprecedented scale across the region. Markets like Johor, Mumbai and Bangkok are now central to deployment strategies, while Southeast Asia and India continue to mature rapidly as hyperscale anchors. The region's record 19.4GW pipeline highlights the depth of committed cloud and AI demand, as well as APAC's growing ability to convert planned capacity into live supply."

This momentum also translated into a notable step-up in live capacity across several markets. Operational capacity rose to 13.8GW in 2025, with Malaysia and India delivering the strongest uplift and accounting for 58% of the region's new operational IT load for the year. This growth is most evident in Johor and Mumbai, which remain the region's fastest-scaling metros. Johor more than doubled its operational capacity during the year, rising from 401 megawatts (MW) to 897MW (+124%), supported by a deepening development pipeline of 315MW under construction and 2,099MW planned. Mumbai recorded a 42% increase in operational IT load (542MW to 768MW) and continues to lead India's future supply with 323MW under construction and 998MW planned, underscoring the sustained hyperscale demand anchoring both markets.

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AI and cloud workloads remain the primary drivers of new supply, prompting operators to prioritise power-ready locations and high-density designs suited for today’s power-intensive workloads. These requirements are accelerating build timelines and enabling committed projects to reach operational status more quickly.

APAC’s Primary Data Centre Markets Overview:

Country	APAC Primary Markets	Operational Capacity (MW)	U/C (MW)	Planned	Colocation Vacancy
Japan	Greater Tokyo	1,179MW	228MW	1,705MW	5.6%
Singapore	Singapore	1,043MW	20MW	237MW	4.9%
Australia	Sydney	786MW	189MW	1,102MW	3.0%
India	Mumbai	768MW	323MW	998MW	6.3%
Greater China	Hong Kong	581MW	161MW	510MW	19.1%
Malaysia	Johor	897MW	315MW	2,099MW	0.7%
Korea	Greater Seoul	601MW	223MW	698MW	6.9%
Indonesia	Greater Jakarta	322MW	186MW	901MW	24.9%
Thailand	Bangkok	113MW	347MW	702MW	17.6%

Governments across the region are also continuing to align policy frameworks with private-sector investment, even as power availability, sustainability commitments and regulatory complexity shape site-selection decisions. **Pritesh Swamy, Head of Research & Advisory – Data Centre Group, Asia Pacific**, said, “Across Asia Pacific, we’re seeing governments recalibrate policies to balance digital infrastructure growth with power and sustainability priorities. This marks a broader shift toward energy-efficient, AI-ready development that supports long-term expansion.”

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APAC Data Centre Maturity Index

Cushman & Wakefield also publishes an annual APAC Data Centre Maturity Index, which provides a comparative view of how 30 data centre markets evolve across the region. The Index evaluates markets based on five core dimensions: current scale, development pipeline, operator depth, vacancy levels and forward growth potential. Markets are grouped into four categories (Powerhouse, Established, Developing and Emerging) to reflect their relative maturity and long-term competitiveness.

The latest APAC Data Centre Maturity Index highlighted the following:

- Johor rose to #1 in the Maturity Index composite, surpassing Tokyo and Beijing on the combined strength of its current scale, pipeline depth and growth trajectory
- Melbourne moved up to the Powerhouse category (APAC's largest and most strategically important data centre hub, with deep hyperscale presence and significant under-construction capacity), supported by rising operational scale and a deepening pipeline
- Osaka progressed to Established (fast-growing locations), reflecting growing operator presence and steady absorption
- Greater Seoul emerged as the largest market within the Established group by operational capacity and development pipeline

For more information on the index and data centre market insights, please click [here](#).

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