



For Immediate Release

## Dallas, Texas Ranked No. 1 Primary Data Market in the World as AI Demand, Power Constraints and Regulation Reshape CRE Strategy

- *Johor and Sydney are the only Asia Pacific (APAC) markets to break into the global top 10 overall primary rankings*
- *Nearly all new data centers in APAC pre-leased as region leads power delivery*

**SINGAPORE – 21 May 2026** – Global data center markets are entering a new phase of expansion defined not simply by growth, but by increasingly strategic and selective development, according to Cushman & Wakefield's [2026 Global Data Center Market Comparison](#) report. For the first time, Dallas ranked as the No. 1 primary data center market in the world, followed by Atlanta, Virginia, Columbus and Johor. Austin-San Antonio and West Texas led the secondary and tertiary market rankings, underscoring Texas' growing importance as a large-scale AI infrastructure hub.

Driven by accelerating AI adoption, cloud computing demand and digital infrastructure investment, global capacity under construction approached 31.7 gigawatts (GW) in 2025, more than doubling from 12.5GW reported in the prior edition of the report. At the same time, developers, occupiers and investors are facing intensifying constraints tied to power availability, land use, permitting timelines and growing regulatory scrutiny.

“The global data center industry has entered a period of managed growth,” said John McWilliams, Head of Data Center Insights at Cushman & Wakefield. “Demand fundamentals remain extraordinarily strong, but the industry is no longer operating in an environment of unconstrained expansion. Power delivery timelines, land availability, community sentiment and regulation are now playing a much larger role in determining where and how data centers get built.”

The report analyzes 107 global markets across 24 variables tied to commercial real estate fundamentals, power infrastructure, development activity, regulation and operational risk and provides a more forward-looking approach to evaluate market dynamics than previous editions.

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## Overall Global Market Ranking

	Primary	Secondary	Tertiary
1	Dallas	Austin/San Antonio	West Texas
2	Atlanta	The Carolinas	Iowa
3	Virginia	Reno	Houston
4	Columbus	Salt Lake City	Tulsa
5	Johor	Montreal	The Dakotas
6	Chicago	Minneapolis	Kansas City
7	Phoenix	Las Vegas	Cheyenne
8	Oregon	Omaha	Texas Panhandle
9	Toronto	Hyderabad	Central Washington
10	Sydney	Reykjavik	Alberta

### APAC Data Center Market Highlights

- Johor (5<sup>th</sup>) and Sydney (10<sup>th</sup>) are the only APAC markets to break into the top 10 overall primary rankings, while Hyderabad ranks 9<sup>th</sup> among secondary markets
- Johor recorded one of the fastest global growth rates (+124% year-over-year), supported by strong land availability (5<sup>th</sup> globally), enabling continued large-scale data center expansion
- Bangkok leads APAC in capacity under construction, followed by Johor, Mumbai, Osaka and Shanghai
- Batam (2<sup>nd</sup>), Jakarta (3<sup>rd</sup>), India (4<sup>th</sup>), and Bangkok (8<sup>th</sup>) rank among the top global markets for power generation growth
- Singapore ranks 1<sup>st</sup> globally for grid stability, with an ultra-low power loss rate of just 0.2%
- Beijing remains the region's dominant market and the only APAC market currently exceeding 2GW of operational capacity

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APAC markets continued to experience substantial operational growth throughout 2025, adding more than 1.5GW of new operational capacity during the year. Despite aggressive development activity, vacancy across the region declined from 12.4% to 10.9% over the year, underscoring sustained occupier demand for digital infrastructure.

Most new data centers in APAC are now fully leased before completion, reflecting the intensity of hyperscale and AI-led demand. Nearly all capacity under construction has been pre-committed, even as development pipelines continue to expand at approximately 20% year-on-year, highlighting continued pressure on available supply.

**Pritesh Swamy, Head of Research and Advisory, Data Center Group, APAC** said, “Asia Pacific is experiencing a significant uptick in preleasing, which is keeping available capacity tight even as pipelines expand. However, shorter power delivery timelines are enabling faster deployment of new capacity than in other regions and this in turn, supports the rapid expansion of hyperscale and AI-driven infrastructure demand in the region.” The report also highlighted that access to power has remained one of the defining variables shaping global data center development strategy. As a result, developers are increasingly pursuing powered land opportunities, integrating private generation into projects and expanding into secondary and tertiary markets where infrastructure constraints may be less severe.

APAC has emerged as the fastest region to deliver power to data centers, with an average timeline of 2.7 years. Global power delivery timelines for new large-load requests now average 4.4 years, with timelines extending to approximately five years across both the Americas and Europe, the Middle East, and Africa (EMEA).

“APAC markets continue to benefit from strong long-term cloud adoption trends, expanding enterprise digitization and growing AI deployment requirements,” said **Andrew Green, Head of Data Center Group, Asia Pacific**. “At the same time, several markets are beginning to encounter the same power and infrastructure challenges that have already emerged in parts of North America and Europe.”

## About the Report

The 2026 Global Data Center Market Comparison evaluates 107 global markets using 24 variables across market fundamentals, terrestrial considerations, power infrastructure and political/regulatory conditions. The report examines operational capacity, development pipelines, vacancy, absorption, cloud presence, land availability, power delivery timelines and other factors influencing global data center development decisions.

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For more information or to download the full report, visit: [Global Data Center Market Comparison | Cushman & Wakefield](#)

**About Cushman & Wakefield**

Cushman & Wakefield (NYSE: CWK) is a leading global commercial real estate services firm for occupiers and investors with approximately 53,000 employees in over 350 offices and nearly 60 countries. In 2025, the firm reported revenue of \$10.3 billion across its core service lines of Services, Leasing, Capital markets, and Valuation and other. Built around the belief that *Better never settles*, the firm receives numerous industry and business accolades for its award-winning culture. For additional information, visit [www.cushmanwakefield.com](http://www.cushmanwakefield.com).

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