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For Immediate Release

APAC Data Centre Asset Values Projected to Exceed US$950 Billion by 2030, Requiring US$280 Billion in New Capital Investment

- *More than 77% of future investment concentrated in Japan, Malaysia, Australia, India and Indonesia*
- *Annual colocation revenue forecast to surpass US$66 billion by 2030*
- *Pre-leasing volumes surged 115% year-on-year as occupiers secure future capacity ahead of delivery*

SINGAPORE, 25 August, 2026 – Asia Pacific's data centre sector is projected to become one of the world's largest digital infrastructure asset classes, with operational asset values expected to exceed US$950 billion by 2030. According to Cushman & Wakefield's 2026 Asia Pacific Data Centre Investment Landscape report, more than US$280 billion in capital expenditure will be required to support the region's rapidly expanding development pipeline through the end of the decade.

The investment opportunity is underpinned by accelerating artificial intelligence (AI) adoption, cloud expansion and digital transformation across the region. While APAC accounts for more than 60% of the world's population, it currently represents only 22% of global operational data centre capacity, highlighting substantial runway for future infrastructure investment and development.

"APAC remains one of the most compelling digital infrastructure investment opportunities globally," said **Pritesh Swamy, Head of Research & Consulting, Data Centre Group, APAC**. "The sector's growth is no longer driven solely by digital adoption. Investors are increasingly responding to the scale of infrastructure required to support AI, cloud computing and rapidly growing data consumption across the region. The imbalance between demand and available infrastructure continues to create significant opportunities for capital deployment."

Capital Investment Concentrated in Five Key Markets

Investment requirements are becoming increasingly concentrated in a select group of markets. Nearly 77% of APAC's projected capital expenditure through 2030 is expected to be deployed across Japan, Malaysia, Australia, India and Indonesia, representing approximately US$215 billion in investment opportunities. Japan alone accounts for nearly one-quarter of the region's total projected capital requirements.

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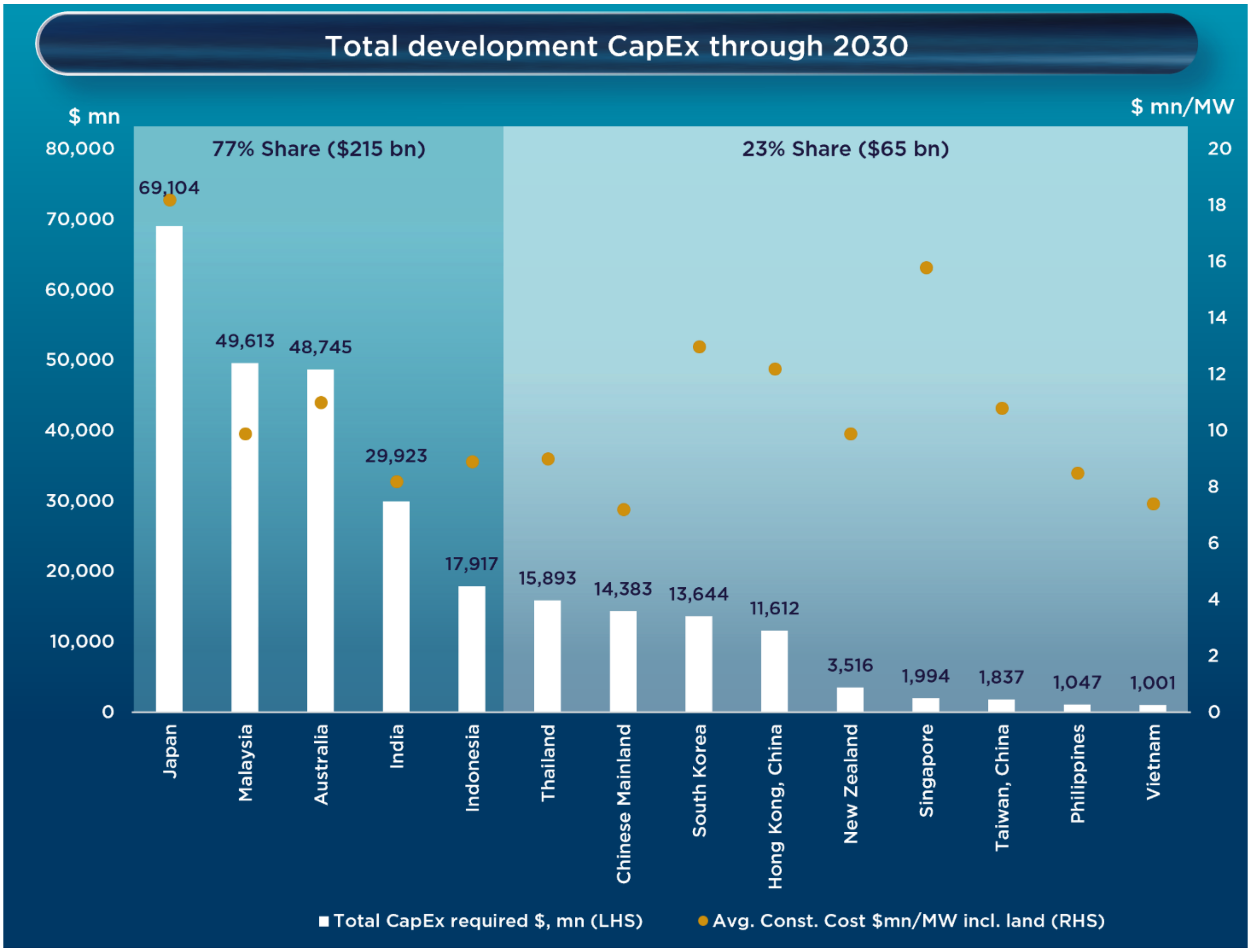

Supporting these investment fundamentals is a rapidly expanding development pipeline. APAC's total data centre capacity is projected to increase by 2.7x in total capacity by 2030, outpacing the Americas (2.6x) and EMEA (2.3x), driven by 26,455 megawatts (MW) in its development pipeline against 15,135MW of current operational capacity.

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Strong Capital Flows and Demand Visibility Reinforce Investment Fundamentals

Capital continues to flow into the sector at an accelerated pace. More than US$43 billion in publicly announced debt financing was raised across APAC data centre operators in 2025 and 2026, reflecting strong appetite from banks, infrastructure investors and institutional capital seeking exposure to digital infrastructure assets.

Strong occupier demand also reinforces the investment case. Pre-leasing volumes surged 115% between H1 2025 and H1 2026 as operators and hyperscale customers secured future capacity ahead of delivery, particularly in markets facing power constraints and longer development timelines. Australia, Malaysia, India and Japan accounted for the largest volumes of committed capacity, while Indonesia and Thailand recorded the fastest growth, rising fivefold and ninefold respectively. Approximately 7.8 gigawatts (GW) of future capacity has already been secured across the region.

Supported by strong demand fundamentals and expanding capacity, annual colocation rental revenue across APAC is forecast to exceed US$66 billion by 2030. Japan, Australia, Malaysia, India and Chinese mainland are

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expected to account for approximately 71% of total regional revenue, reinforcing their position as the region's most significant investment markets.

Gordon Marsden, Head of Global Capital, APAC & EMEA, said, "What we're seeing is growing conviction among institutional investors that data centres are no longer a niche alternative asset class but a critical component of modern infrastructure portfolios. Strong financing activity, increasing demand visibility and long-term revenue growth are supporting continued capital deployment across the region."

AI Is Reshaping Data Centre Investment Strategies

AI is also reshaping investment requirements across the sector. AI-ready facilities equipped with advanced cooling technologies require between 25% and 35% higher capital expenditure than traditional data centres, reflecting the need for higher power densities and specialised infrastructure. As AI adoption accelerates, investors are increasingly evaluating assets based on their ability to support next-generation computing workloads.

"We're entering a phase where infrastructure readiness will become a key determinant of capital allocation," said **Andrew Green, Head of Data Centre Group, APAC**. "Investors are increasingly prioritising assets and markets that can provide long-term power availability, scalability and the capability to support future AI requirements. Those factors will increasingly influence where capital flows and how value is created across the sector."

About the Asia Pacific Data Centre Investment Landscape Report

The Asia Pacific Data Centre Investment Landscape report provides an assessment of the investment trends, growth drivers and capital market dynamics shaping the region's digital infrastructure sector across 14 APAC markets.

The 2026 edition examines key indicators including:

- Population per megawatt
- Pre-leasing trends and occupier behaviour
- Lender perspectives and financing trends
- Capital expenditure requirements
- Revenue outlook and cap rate estimates
- Yield on cost and investment returns
- Asset valuation outlook through 2030

For more information and to download the report, please click here.

About Cushman & Wakefield

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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.

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