

Asia Pacific Data Center Colocation Market Size and Forecast (2021 - 2031)

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Abstracts

The Asia Pacific Data Center Colocation Market is projected to grow significantly, reaching an estimated US\$ 51,886.6 million by 2031, up from US\$ 16,627.3 million in 2024. This growth represents a compound annual growth rate (CAGR) of 17.9% from 2025 to 2031, making Asia Pacific the fastest-growing region in the data center colocation sector. This rapid expansion is driven by several factors, including digital transformation, the adoption of artificial intelligence (AI), and proactive government sustainability initiatives.

According to the International Energy Agency (IEA), energy demand in the Asia-Pacific region, particularly in countries like China, India, Southeast Asia, and Japan, is expected to double by 2030. This surge in energy consumption is particularly pronounced in Southeast Asia, where electricity usage in data centers is anticipated to more than double during the same period. In response to this growing demand, governments across the region are implementing stringent efficiency standards. For instance, China introduced a national Green Data Center standard in July 2023, which mandates that colocation facilities achieve a Power Usage Effectiveness (PUE) of below 1.4, with a further tightening to 1.3 by 2025. Additionally, Singapore is advancing its Green Data Centre Roadmap and Sustainable Tropical Data Centre Testbed, which are part of its Green Plan 2030, focusing on innovative cooling technologies.

India is emerging as a significant player in the data center colocation market, with plans to install nearly 2 GW of new capacity by 2026. This growth is fueled by digitalization and data localization mandates. The Indian government has introduced incentives through its Digital India initiative and is drafting state-level data center policies that require new facilities to source renewable energy. Meanwhile, Malaysia and other ASEAN countries are navigating data center expansion amidst rising energy costs,

investing in smart grids and renewable energy to ensure sustainability.

Key drivers of the market include the migration of enterprises to cloud services, the increasing demand for AI workloads, and the availability of affordable labor. Furthermore, there is a growing emphasis on sustainability, driven by public sector initiatives, climate frameworks, and investments in renewable energy sources such as solar and wind. As a result, colocation operators are compelled to provide energy-efficient, low-carbon facilities that optimize water usage to maintain competitiveness in the market.

The Asia Pacific Data Center Colocation Market can be segmented by type, enterprise size, and industry vertical. In terms of type, the market is divided into Retail Colocation, Wholesale Colocation, and Hybrid Cloud-based Colocation, with Retail Colocation holding the largest market share in 2024. By enterprise size, the market is categorized into Large Enterprises and Small and Medium Enterprises (SMEs), with Large Enterprises also dominating the market share. Industry verticals include IT and Telecom, Banking, Financial Services and Insurance (BFSI), Healthcare, Retail, and others, with IT and Telecom leading the market in 2024.

The outlook for the Asia Pacific Data Center Colocation Market is promising, as governments worldwide are increasingly enacting stringent data sovereignty and localization regulations. These regulations create strategic growth opportunities for colocation providers, particularly for enterprises operating across borders in sectors such as finance, healthcare, and public services. These regulations often require that data generated within a jurisdiction be stored and processed locally, thereby driving demand for compliant colocation facilities. As of 2024, over 100 countries have implemented some form of data residency or sovereignty regulation, with 74 countries imposing conditional restrictions on data transfers and 18 countries enforcing strict localization laws for personal or critical data.

In India, the Digital Personal Data Protection Act (DPDPA) of 2023 mandates consent-based data processing and breach reporting, while regulations from the Reserve Bank of India (RBI) require that payment system data be stored domestically for at least six months. Such policies have elevated the status of data centers to that of critical infrastructure, unlocking access to public financing.

Colocation facilities also help reduce compliance risks, streamline regulatory reporting, and enhance disaster resilience while maintaining regional sovereignty. In regions with emerging localization laws, such as Brazil, Russia, India, and the European Union,

enterprises increasingly depend on third-party colocation providers that meet both regulatory and operational governance standards. As global regulatory complexity increases, colocation providers are well-positioned to deliver governed, sovereign, and scalable infrastructure, making them essential enablers of compliance, resilience, and digital transformation in a regulated global landscape.

Geographically, the Asia Pacific Data Center Colocation Market is segmented into countries including Australia, China, Japan, India, South Korea, and the Rest of APAC. China currently holds the largest market share, driven by rapid digitalization, supportive government policies like "Digital China 2025," and strong demand from cloud providers and enterprises. The Ministry of Industry and Information Technology (MIIT) reports that China's data center capacity exceeds 6 million racks, with major hubs located in Beijing, Shanghai, and Shenzhen. However, challenges such as power restrictions in key cities and regulatory hurdles for foreign operators persist. Domestic companies like Chindata, GDS, and Sinnet lead the market, while global hyperscalers often collaborate with local partners.

Key players in the Asia Pacific Data Center Colocation Market include International Business Machines Corp, Rittal GmbH & Co KG, Equinix Inc, Digital Realty Trust Inc, CoreSite Realty Corporation, CyrusOne Inc, Telehouse, NTT Data Corp, AT&T, and Iron Mountain Inc. These companies are pursuing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their offerings and increase market share.

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