

Asia Pacific Data Center Equipment Market Size and Forecast (2021-2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Equipment Type [Servers, Storage Devices, Cooling Equipment, Power Distribution Units (PDUs), Racks, Enclosures, Others], Servers (Rack Server, Blade Server, Tower Server), Cooling Equipment (Air Conditioners, Chillers, Air Handling Units, Heat Exchangers, Others), Power Distribution Units (Switched Rack PDU, Metered Rack PDU, Monitored Rack PDU, and Basic Rack PDU), Racks (Enclosed Racks, Open Frame Racks, Wall Mount Racks, and Others), and Tier Type (Tier 3, Tier 4, Tier 1, Tier 2)

<https://marketpublishers.com/r/A1ED3E6B04C8EN.html>

Date: October 2025

Pages: 206

Price: US\$ 3,450.00 (Single User License)

ID: A1ED3E6B04C8EN

Abstracts

The Asia Pacific data center equipment market is projected to grow significantly, reaching approximately US\$ 125,929.14 million by 2031, up from US\$ 50,054.12 million in 2024. This growth represents a compound annual growth rate (CAGR) of 14.2% from 2025 to 2031, indicating a robust expansion in the sector.

Executive Summary and Market Analysis

The Asia Pacific data center equipment market encompasses several key regions, including Australia, China, India, Japan, South Korea, and the broader Asia Pacific area. According to the Asia Cloud Computing Association's report from July 2024, the

demand for data centers in the Asia Pacific is surging, driven by increased internet usage, the rapid growth of e-commerce, ongoing digital transformation initiatives, and the adoption of advanced technologies such as artificial intelligence (AI) and cloud computing.

A report by Cushman & Wakefield in the second half of 2024 highlighted that over US\$ 116 billion will be required to develop the existing colocation data center pipeline in the Asia Pacific over the next five to seven years. This substantial investment is expected to significantly boost the demand for essential data center infrastructure, including servers, cooling systems, power management tools, and networking equipment. As the number of data centers increases to accommodate the rising demand for digital services, cloud computing, and AI technologies, the need for advanced and energy-efficient equipment will also rise, creating new opportunities for market growth.

The data center industry in the Asia Pacific has experienced considerable growth across both advanced and developing economies. Companies are increasingly willing to invest in new data storage and deployment infrastructure. For example, India's data center capacity in its top seven cities currently stands at 977 MW, with an additional 1.03 GW under construction by 2028. Plans for further expansion could bring India's total projected data center capacity to 3.29 GW by 2028.

Recent developments in the sector include the announcement by Colt Data Centre Services (Colt DCS) in February 2025 of a new hyperscale data center, Inzai 4, in Tokyo, Japan. Additionally, Doma Infrastructure Group (DIG) revealed plans for a 50MW to 60MW data center in West Sydney, Australia. Such expansions are expected to drive the demand for advanced infrastructure and equipment, including servers, cooling systems, and power management solutions.

Strategic Insights

Market Segmentation Analysis

The Asia Pacific data center equipment market can be segmented by equipment type and tier type. By equipment type, the market includes servers, storage devices, cooling equipment, power distribution units (PDUs), racks, enclosures, and others. The servers segment held the largest market share in 2024. In terms of tier type, the market is divided into tier 1, tier 2, tier 3, and tier 4, with tier 3 also holding the largest share in 2024.

Market Outlook

The issue of e-waste generated by data centers has reached alarming levels, with the Global E-waste Monitor reporting 61.9 million metric tons of e-waste generated in 2022, a figure that is increasing by 2.6 million tons annually. Furthermore, data center power demand accounts for about 2% of total global greenhouse gas emissions. The International Energy Agency (IEA) noted that global data centers consumed nearly 460 terawatt hours (TWh) of electricity in 2022, with projections suggesting this could rise to 1000 TWh by 2026. If these trends continue unchecked, they could severely impact global carbon reduction targets.

In response, businesses and governments are intensifying efforts to combat climate change and reduce carbon footprints. Data center operators are increasingly adopting sustainable and energy-efficient technologies to comply with regulatory requirements and meet environmental goals. For instance, Microsoft introduced a new data center design in December 2024 that optimizes AI workloads while consuming zero water for cooling, thereby avoiding the need for over 125 million liters of water annually per data center. Similarly, Amazon Web Services announced new components designed to support the next generation of AI innovation, focusing on energy efficiency.

Country Insights

The Asia Pacific data center equipment market is further analyzed by country, with China, Japan, India, South Korea, Australia, and the Rest of Asia Pacific being key players. China held the largest market share in 2024, driven by increased investments in computing capacity in response to US export controls on advanced chips. This push for domestic technological capabilities is fueling demand for advanced data center infrastructure. For example, in July 2024, China Mobile launched a new data center in Beijing, part of a broader initiative to enhance computing resources across various regions.

Company Profiles

Key players in the Asia Pacific data center equipment market include ABB Ltd, Legrand SA, Schneider Electric SE, Rittal GmbH and Co KG, Eaton Corp Plc, Dell Technologies Inc, Honeywell International Inc, Vertiv Group Corp., Delta Electronics Inc, and Cisco Systems Inc. These companies are employing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

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