

Southeast Asia Data Center Cooling Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Data center cooling refers to the systems and technologies that enable the control of temperature, airflow, and humidity in data centers, thereby providing optimal performance and preventing equipment overheating, which is essential for ensuring the uptime, energy efficiency, and general data center reliability.

The Southeast Asian Data Center Cooling market is expected to exhibit a growth rate of 15.45% during the forecast period (2025-2033F). The rapid growth of hyperscale and colocation data centers, driven by cloud computing, AI workloads, and digital transformation programs, fuels the market across Southeast Asian countries. Also, the increasing adoption of the internet, the deployment of 5G, and government-initiated programs to digitize the economy are driving the demand for large-scale and energy-efficient data center deployments. Furthermore, the operational reliability requirement, combined with rising electricity prices and environmental regulations, is driving the adoption of high-efficiency cooling systems and investment in green infrastructure.

Based on cooling type, the market is segmented into air-based cooling, liquid-based cooling. Among these, the liquid-based cooling market is expected to grow at a significant CAGR during the forecast period (2025-2033). The market is growing due to the liquid-based cooling, as data centers in Southeast Asia encounter increasing power densities and heat loads due to AI and cloud applications. This technology is more efficient and able to use less energy than traditional air cooling, which is ideal for the hyperscale environment. The increasing need for sustainable operations with low-PUE is increasing the pace of adoption of new and upgraded facilities. On 24 April 2025, ST Telemedia Global Data Centres (STT GDC), a leading data centre service provider in Asia, announced the launch of a direct-to-chip liquid cooling showcase at its flagship

STT Bangkok 1 data centre facility. Showcasing advanced cooling technologies already supporting operational AI clusters, high-density racks, and live customers at Thailand's first NVIDIA DGX-Ready data centre.

Based on component, the Southeast Asian Data Center Cooling market is segmented into solution and service. The solution segment is sub-segmented into air conditioners, cooling towers, chillers, air handling units, and others, and the service segment is sub-segmented into installation & deployment, support & consulting, and maintenance services. Among these, the solution segment held the dominant share of the Southeast Asia Data Center Cooling market in 2024. The data center infrastructure growth in the region is driven by cooling solutions, including chillers, precision air conditioners, and air handling units. Adding to this, companies are investing more in scalable systems that are integrated and can enhance uptime while lowering operational costs. Moreover, the shift towards energy-efficient and modular solutions helps in the rapid growth of the data center and the achievement of environmental and cost-efficiency objectives.

Based on data center type, the market is segmented into hyperscale data centers, enterprise data centers, colocation data centers, and others. Among these, the hyperscale data centers market is expected to grow at a significant CAGR during the forecast period (2025-2033). This is mainly due to the development of cloud service providers and international technology companies, which is facilitated by the growth of these industries. The massive capacity of these facilities demands an advanced and high-capacity cooling system to utilize heavy workloads. Therefore, due to the rising demand for digital services, hyperscale operators are driving the development of liquid-based and AI-based cooling innovations to ensure performance and sustainability. For example, on September 10, 2025, Vantage Data Centers secured a USD 1.6 billion investment in the APAC platform from GIC and Abu Dhabi Investment Authority (ADIA). The investment to support accelerated expansion in APAC, including the acquisition of a hyperscale data center campus in Johor, Malaysia, strengthens Vantage's position as a market leader in Asia Pacific.

Based on end-use industry, the market is segmented into IT and telecom, banking, financial services, and insurance (BFSI), media and entertainment, healthcare, government and defense, retail, and others. Among these, the IT and telecom segment held the dominant share of the Southeast Asia Data Center Cooling market in 2024. The continuous digitalization, deployment of 5G,

and adoption of cloud technologies are driving the demand. Moreover, telecom companies are also updating existing facilities with efficient cooling to provide more data traffic and low-latency needs. This growth is increasing investment in new cooling facilities, especially colocation and edge data centers. On May 15, 2025, Equinix, Inc. inaugurated its first International Business Exchange (IBX) data center in Jakarta, a joint venture with PT Astra International Tbk (“Astra”). This high-performance data center, known as JK1, offers access to over 50 global and local network service providers and internet exchanges, creating a robust ecosystem that supports businesses expanding in Indonesia. JK1 incorporates sustainability into its design, leveraging innovative technologies such as Cooling Array and liquid cooling technology, ensuring efficient heat management for high-density and high-performance computer workloads such as AI.

For a better understanding of the market adoption of the Southeast Asian Data Center Cooling market, it is analyzed based on its regional presence in Southeast Asia, including Indonesia, Thailand, the Philippines, Vietnam, Malaysia, Singapore, and the Rest of Southeast Asia. Indonesia is expected to grow at a significant CAGR during the forecast period (2025-2033). This is mainly driven by cloud development, digital transformation, and a young population with strong internet connectivity. The increased installation of modular and high-efficiency cooling systems is being driven by the proliferation of hyperscale facilities in the areas surrounding Jakarta and Batam. Moreover, companies are investing in local cooling systems to cope with increasing heat demands and lower energy bills. For example, DCI Indonesia officially launched JK6 on June 3, 2025, the eighth data center, located at the DCI-H1 Campus in Cibitung, West Java. With a capacity of 36 megawatts, JK6 is the largest single-built data center in Indonesia. JK6 sets a new standard in Indonesia's colocation data center with 36 megawatts of AI-ready capacity by its liquid cooling systems, designed to support high-performance computing needs. This brings DCI's total capacity to 119 MW across 3 locations, and is a concrete response to Indonesia's growing demand for reliable, secure, and scalable digital infrastructure.

Some major players running in the market include Schneider Electric, Vertiv Group Corp., STULZ Asia Hub Pte Ltd. (STULZ GMBH), Huawei Digital Power Technologies Co., Ltd. (Huawei Technologies Co., Ltd.), DAIKIN INDUSTRIES, Ltd., Johnson Controls, Alfa Laval AB, RITTAL Pte. Ltd. (Rittal GmbH & Co. KG) (Friedhelm Loh Group), Delta Electronics (Thailand) PCL. (Delta International

Holding Limited B.V.), Danfoss.

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