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3Q 2026 APAC **Data Center Market Report**



Powered by datacenterHawk's 29 market experts worldwide.

CAPACITY OVERVIEW

Supply nearly doubled in a year and still got tighter

Colocation power nearly doubled in a year while vacancy fell by more than half. Asia Pacific leased more in 3Q alone than in all of 2025.



18.6 GW

Commissioned colocation power, built or preleased



2.96%

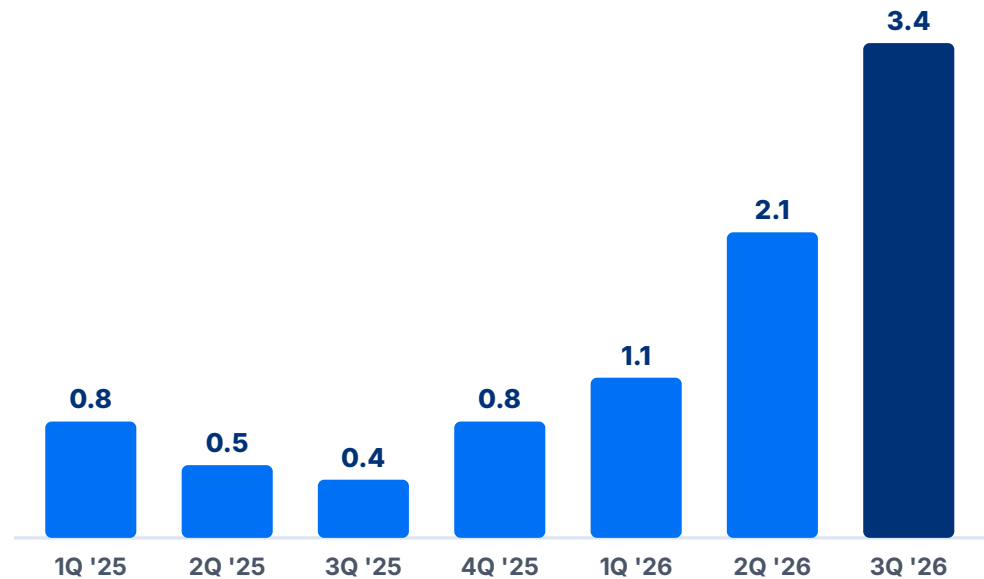
Colocation vacancy, down from 7.3%



94%

Share of 2026 leasing that was preleased

Asia Pacific leasing by quarter, GW



Source: [datacenterHawk Platform](#), 3Q 2026

MARKET LEADERBOARD

The markets leading 2026

Melbourne overtook Johor for the top spot, and Jakarta climbed from 5th to 3rd. Seven markets leased 100 MW or more in 3Q, up from none a year ago.

2026 Absorption so far, top five markets, with each market's regional rank for all of 2025

1	<u>Melbourne</u>		1,546 MW	▲ #2 in 2025
2	<u>Johor</u>		1,279 MW	#1 in 2025
3	<u>Jakarta</u>		973 MW	▲ #5 in 2025
4	<u>Sydney</u>		710 MW	#4 in 2025
5	<u>Mumbai</u>		444 MW	▲ #7 in 2025

Source: [datacenterHawk Platform](#), 3Q 2026

LEASING · MELBOURNE

Tier 2 markets now lead Asia Pacific's demand

Melbourne leased more in 3Q than every European market combined, and that one quarter was more than twice its total for all of 2025.

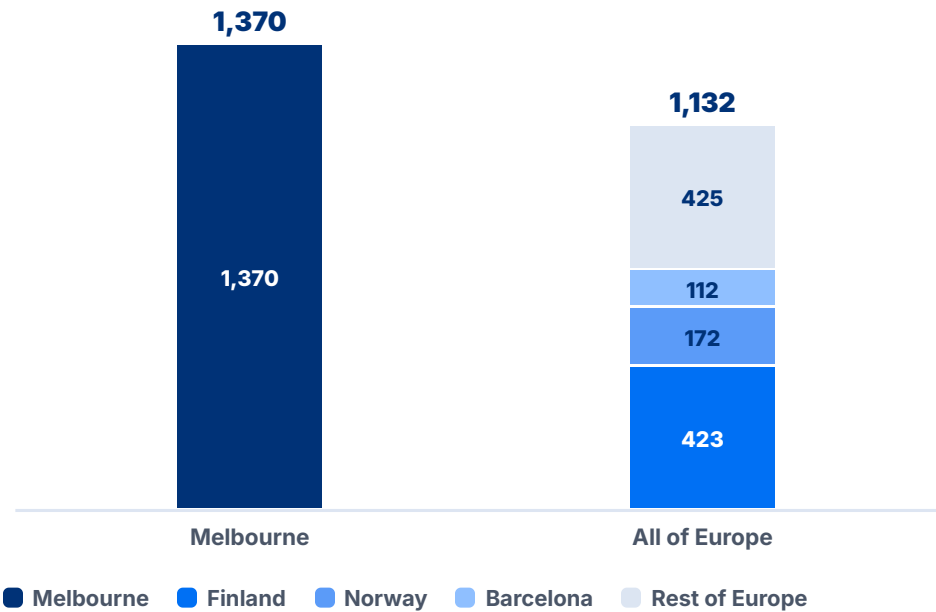


"These markets have the land, they have the power, and the right mix of brown and green power. The governments are also actively laying the red carpet for them to come in."

Dedi Iskandar · Regional Director, APAC

► [Watch Dedi on the 3Q update](#)

3Q 2026 leasing, MW



Source: [datacenterHawk Platform](#), 3Q 2026

SUPPLY · GIGAWATT MARKETS

More Asia Pacific markets are reaching gigawatt scale

Eight markets now have more than 1 GW of colocation power, up from three a year ago and one two years ago. Five markets are at 1% vacancy or lower, up from two a year ago.

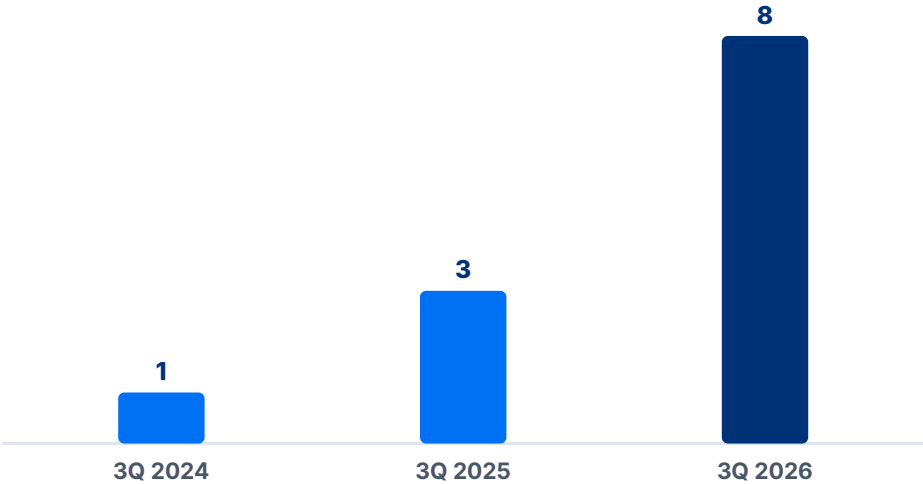


"We are now facing what we call the hunt for power supply locations."

Dedi Iskandar · Regional Director, APAC

▶ [Watch Dedi on the 3Q update](#)

Asia Pacific markets with more than 1 GW of colocation power



Source: [datacenterHawk Platform](#), 3Q 2026

PRICING · HYPERSCALE

Scarcity is pushing hyperscale rates up fast

Hyperscale rates rose 28% to 34% this year in Seoul, Osaka, Melbourne, Tokyo and Singapore. At the other end, Johor has the lowest rates we track for 100+ MW deals, about half of Northern Virginia's.



"The neoclouds are more willing to pay a premium on top of the hyperscale price for faster delivery, to make sure they get the capacity on time."

Dedi Iskandar · Regional Director, APAC

► [Watch Dedi on the 3Q update](#)

Change in hyperscale rate range midpoint, 2025 to 2026



Source: [datacenterHawk Platform](#), 3Q 2026

CLOSING NOTES

What to watch into 2027

Power and water decide most deals in Asia Pacific, and the next wave of supply is already scheduled.



6.9 GW due in 2027

Colocation power scheduled to deliver in Asia Pacific next year. Planned capacity is 2.3 times what is commissioned today.



Permits and moratoriums

Thailand paused 166 projects to write national rules, and [Johor's](#) new water moratoriums now separate viable projects from stalled land.



Singapore sets the bar

A new 200 MW allocation comes with strict green, efficiency and liquid cooling requirements.



Where the pipeline points

[Hyderabad's](#) pipeline is more than 9 times its current footprint, [Kuala Lumpur's](#) nearly 8 times and [Manila's](#) 6 times.

WHY THIS DATA IS DIFFERENT

Verified at the source

Every figure here is sourced directly from operator relationships, verified by an in-region research team, and refreshed quarterly.



11,000+

Facilities tracked



460+

Markets covered



1,100+

Operators tracked



600+ GW

Power tracked

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