NEXTDC

Malaysia’s Data Centre Market

Overview & Key Insights

January 2026

Four forces shaping Malaysia's data centre landscape

Policy tailwinds, hyperscaler investment, ready infrastructure, converging competitor messages

Malaysia is the growth engine of ASEAN Data Centres, policy tailwinds, hyperscaler capital and ready infrastructure are accelerating builds, while competitors' messages converge on power and speed.

Data Centres in Malaysia

Incumbents

- BRIDGE DATA CENTRES
- AIMS
- TM ONE
- NTT
- open dc
- VANTAGE DATA CENTERS
- DAYONE

New Entrants

- AIRTRUNK
- EQUINIX
- NEXTDC
- edgeconnex
- STTelemedia Cloud
- Princeton Digital Group

Key Insights

1. ASEAN growth

Regional capacity **>4× by 2028**; Malaysia captures a leading share

2. Malaysia footprint

108 DCs (live/UC/planned); **Klang Valley** leads facility count; **Johor** racing toward **~1 GW** hyperscale.

3. Market drivers

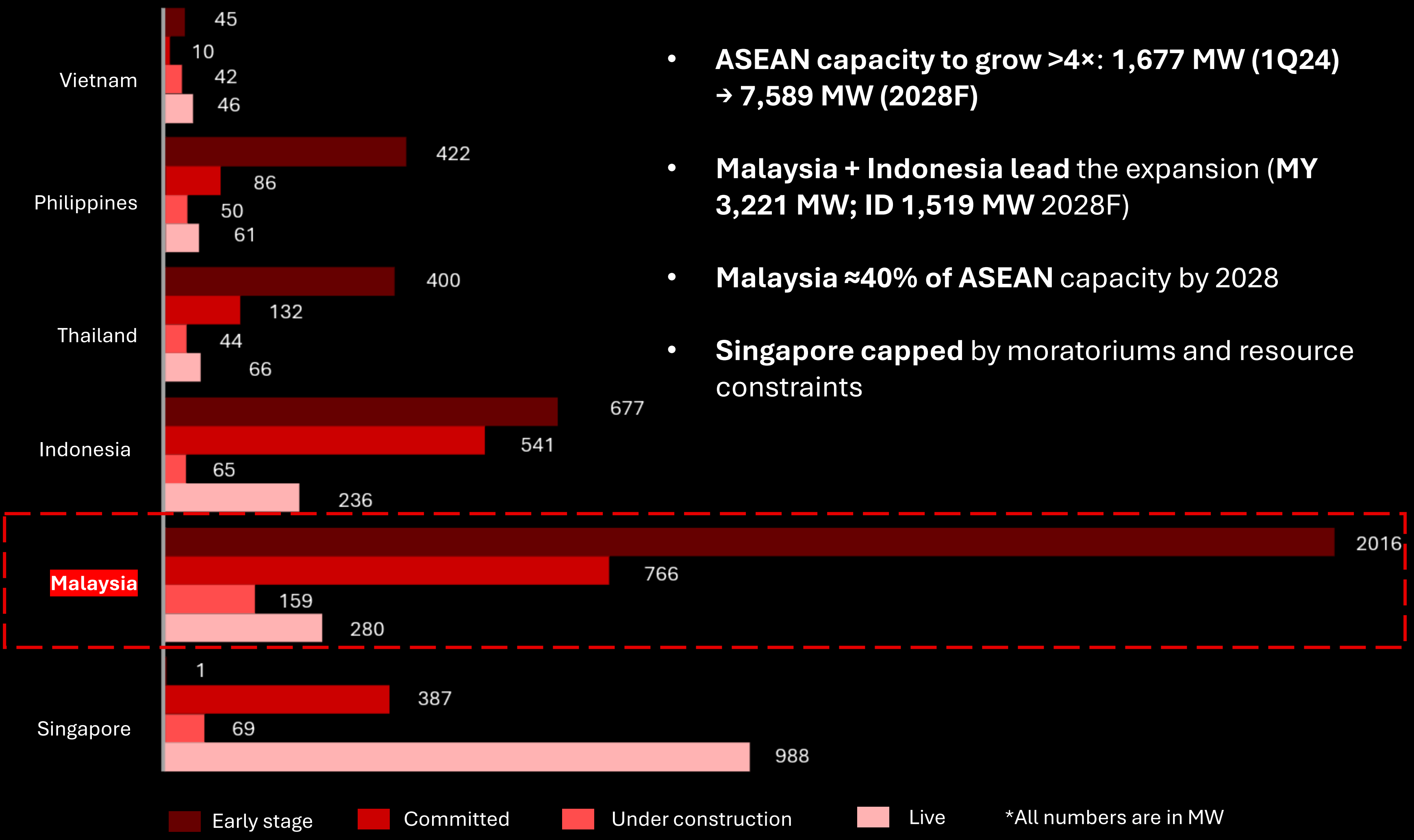
US$23.3B in 2024 digital/DC investment announcements; delivery accelerated by **TNB Green Lane Pathway**, **CRESS**, **NETR**.

4. Competitive landscape

The market is highly competitive, with operators commonly emphasising sustainability, compliance, and scale in their positioning

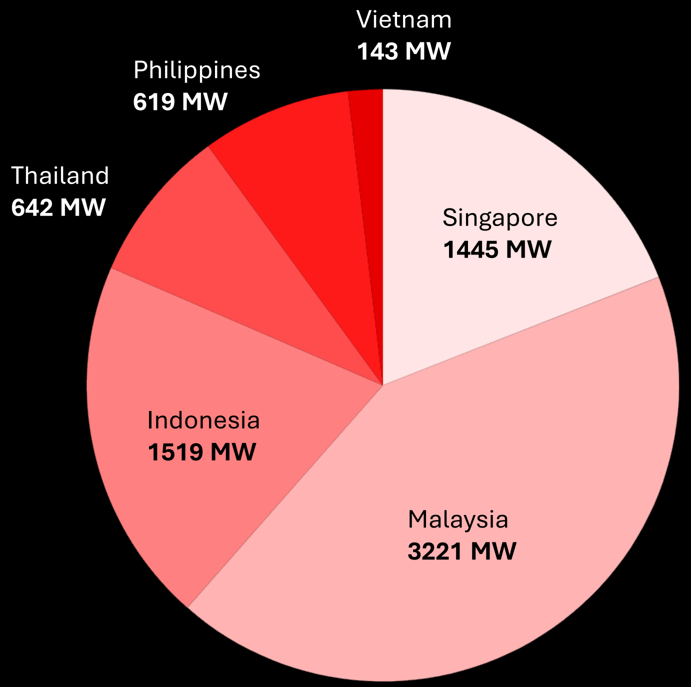
MALAYSIA TO LEAD ASEAN DATA CENTRE GROWTH

By 2028, Malaysia will represent 40% of total ASEAN capacity.



- **ASEAN capacity to grow >4×: 1,677 MW (1Q24) → 7,589 MW (2028F)**
- **Malaysia + Indonesia lead** the expansion (**MY 3,221 MW; ID 1,519 MW** 2028F)
- **Malaysia ≈40% of ASEAN** capacity by 2028
- **Singapore capped** by moratoriums and resource constraints

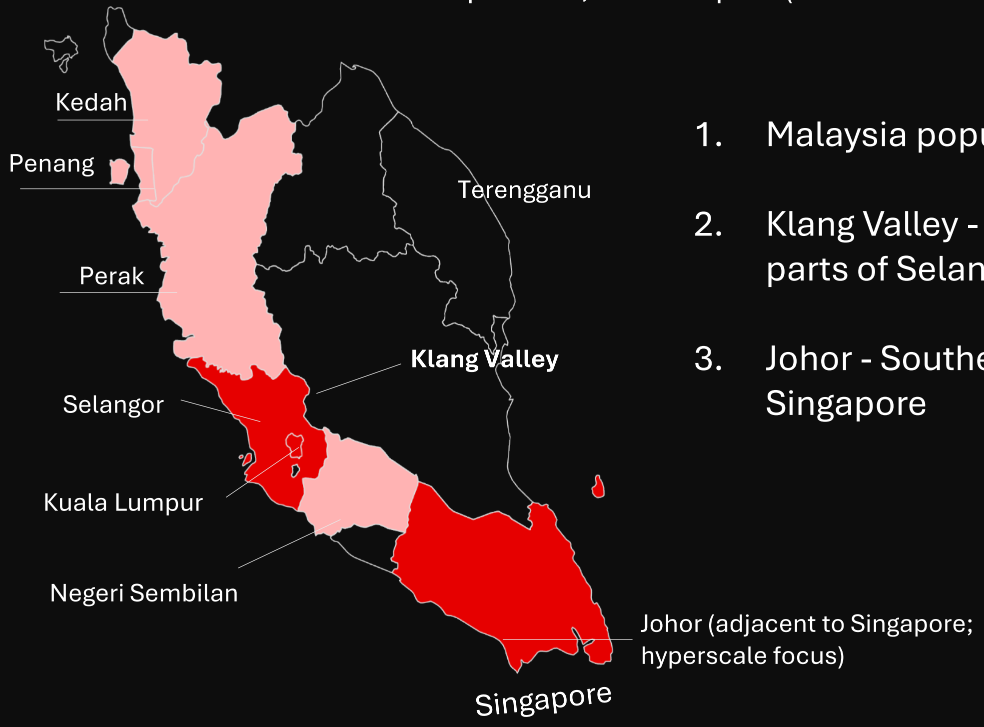
2028F ASEAN share (Malaysia ≈ **40%)**



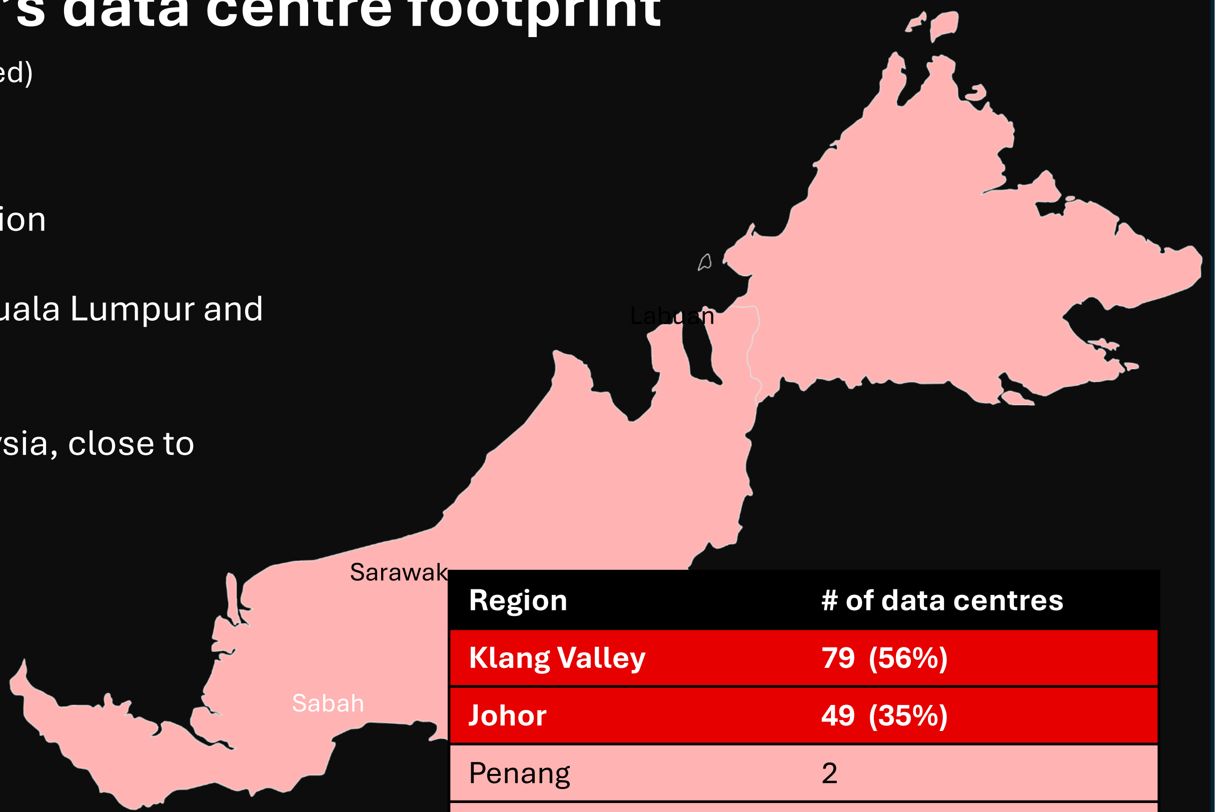
Source: Knight Frank report

Klang Valley & Johor dominate Malaysia's data centre footprint

140 data centres from 56 operators, two hotspots (live / under construction / planned)



1. Malaysia population is 33 Million
2. Klang Valley - Urban area of Kuala Lumpur and parts of Selangor
3. Johor - Southern part of Malaysia, close to Singapore



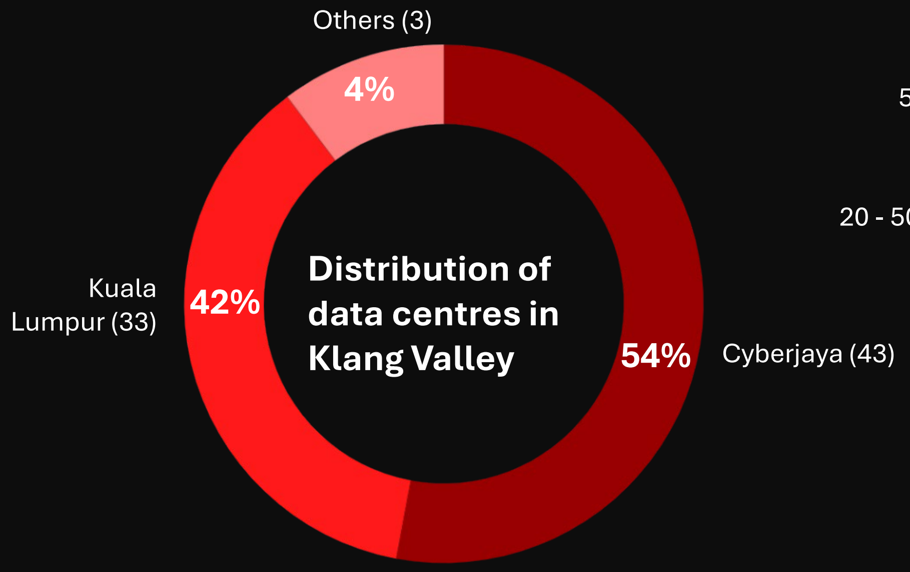
Region	# of data centres
Klang Valley	**79 (56%)**
Johor	**49 (35%)**
Penang	2
Sarawak	2
Negeri Sembilan	2
Kedah	3
Perak	1
Labuan	1
Terengganu	1
Total	**140**

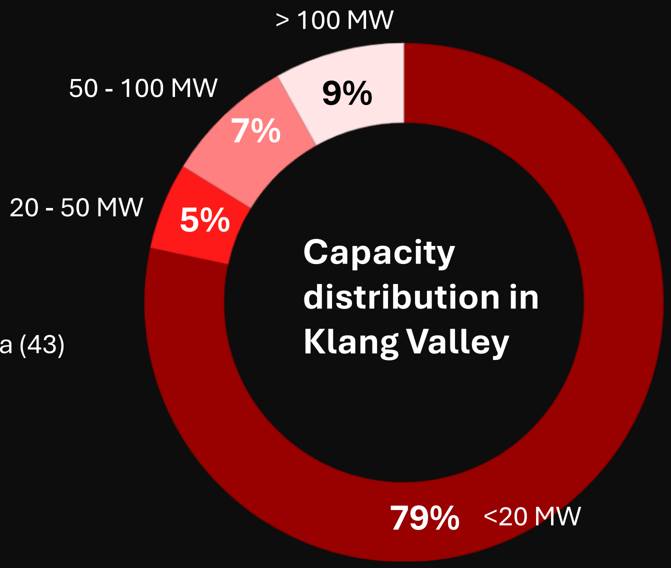
- **Klang Valley (74 | ~56%)** - Enterprise & government hub *(Greater KL: KL + Selangor)*
- **Johor (32 | ~35%)** - Fast-emerging **hyperscale** hub next to Singapore; racing toward **~1 GW**
- **Emerging (12 DCs)** - Sarawak, Kedah, Negeri Sembilan, Penang, Perak, Labuan *(policy-led, not demand-led)*

Source: MUFG – IRCD Strategic Research Office (September 2025)

Klang Valley is dense; Cyberjaya leads count, large blocks are rare

79 sites; **~79% <20 MW**; Cyberjaya majority





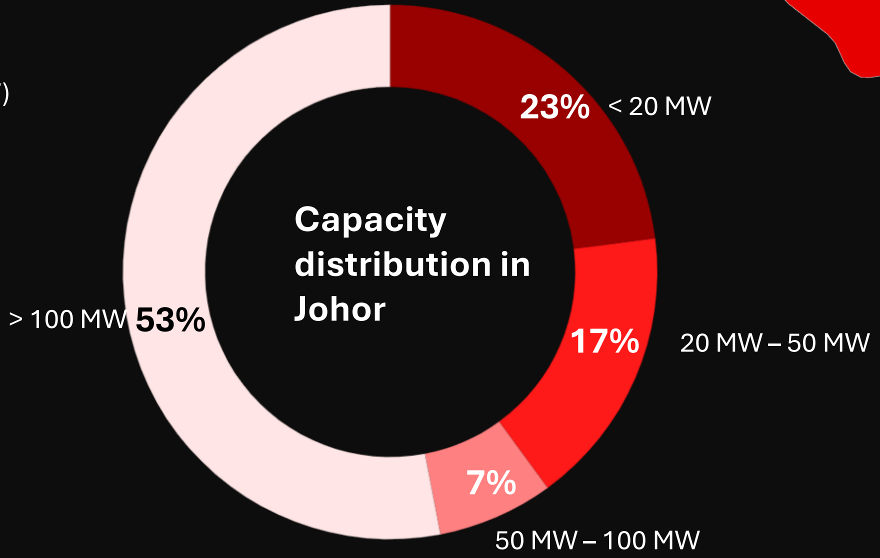
Company	Number of data centres	Location & Estimated capacity (Klang Valley)
NTT	5	Cyberjaya (40MW)
Bridge Data Centres	3	KL (64MW), Cyberjaya (20MW)
AIMS	3	KL (7.5MW), Cyberjaya (100MW)
EdgeConneX	3	Bukit Jalil (67MW), KL(17MW) , Cyberjaya (200MW)
TM One	3	Total 46MW

Source: MUFG – IRCD Strategic Research Office (September 2025)

- **79 data centres** in Klang Valley *(KL + Selangor)*.
- **Cyberjaya hosts most sites (43); KL 33 sites.**
- **Capacity skew is small: ~79%** of sites are **<20 MW**; **>100 MW** sites are **~9%**.
- **KV suits enterprise/gov and smaller blocks; hyperscale blocks cluster in Johor.**

Johor: Malaysia’s hyperscale hub next to Singapore

49 data centres from 21 operators (~30% of MY); larger blocks with **53% >100 MW**; master-planned parks (Kulai, Iskandar Puteri).



Company	Number of data centres	Location & estimated capacity (Johor)
DayOne	2	Iskandar Puteri (240 MW)
ST Telemedia, Basis Bay, Keppel JV	3	Iskandar Puteri (120 MW)
Princeton Digital	2	Kulai (400 MW)
Airtrunk	2	Iskandar Puteri (420 MW)
Vantage	2	Iskandar Puteri (300 MW)

Source: MUFG – IRCD Strategic Research Office (September 2025)

- **49 data centres (~35%)** in Johor; **larger average capacity** than Klang Valley.
- **53% of sites are >100 MW** (master-planned parks).
- **Total ~2.5 GW** pipeline in Johor
- **Proximity to Singapore** captures cross-border hyperscale demand.