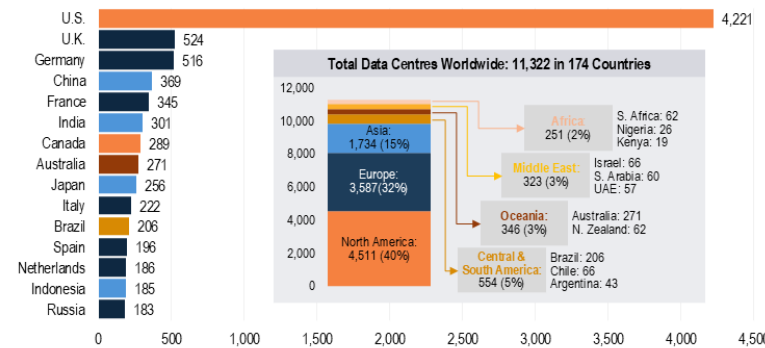


Global Data Centre Infrastructure Is Highly Concentrated, With Africa Largely Absent and Asia Uneven

The U.S. and Europe dominate global data centre infrastructure, while Asia's footprint is concentrated in a few hubs and Africa remains structurally under-capacity despite rising investment.

Data Centre Global Distribution: Top 15 Countries (2026)

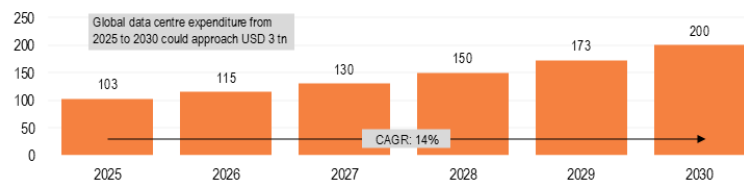


State of Play: Data Centres in Asia and Africa

Asia: Scaling, But Concentrated		
Concentrated Hubs	Scaling Investment	Hyperscale Expansion
China, India, Japan, S. Korea: 60% of regional capacity	USD 155 bn of USD 400 bn global data centre market	Fastest-growing hyperscale region, led by China and India

Africa: Structural Underbuilt		
Minimal Footprint	Limited Scale	Catch-Up Growth
2% of global data centre capacity, led by South Africa	Market size of USD 1.9 bn (2025), far below global peers	Rapid expansion, but from a very low base (CAGR 15% to 2030)

Global Data Centre Capacity Outlook, GW (2025-2030F)



Note: GW - Gigawatt. Source: Data Centre Map, Société Générale, Africa Data Centres Association, JLL Research, ANDAMAN PARTNERS Analysis

Why Do Data Centres Matter?

- Data centres underpin the global digital economy, enabling cloud computing, AI workloads, data storage and real-time connectivity.
- They are rapidly becoming major energy consumers, with AI-driven demand accelerating electricity usage and linking digital infrastructure directly to power systems.
- Control over data centres increasingly shapes data sovereignty, cybersecurity and national competitiveness.
- As critical infrastructure, they determine where digital value is created, processed and monetised, influencing global economic power.

Global data centre infrastructure, now central to the functioning of the digital economy, is highly concentrated in a small number of countries. The U.S. alone hosts over 4,200 data centres, far exceeding any other market, with Europe forming a dense secondary cluster. Together, North America and Europe account for the majority of global capacity, underscoring how firmly digital infrastructure remains anchored in advanced economies.

Asia represents the only region outside the West with meaningful scale, but its footprint is far from evenly distributed. A handful of hubs, primarily China, India, Japan and South Korea, account for 60% of regional capacity, supported by strong investment and rapid expansion in hyperscale facilities. While the region is growing quickly, this growth is concentrated in select markets rather than broadly distributed.

By contrast, Africa remains structurally underbuilt. The continent accounts for roughly 2% of global data centre capacity, with infrastructure heavily concentrated in South Africa. Although investment is accelerating and capacity is expected to expand significantly over the coming decade, this growth is occurring from a very low base.

Looking ahead, global data centre capacity is projected to rise steadily through 2030, driven by demand for cloud computing, artificial intelligence and digital services. However, this expansion is unlikely to materially alter the underlying geographic imbalance. As a result, control over the infrastructure that underpins the digital economy remains highly concentrated, with significant implications for global competitiveness, data sovereignty and economic development.

Also by *ANDAMAN PARTNERS*:

- [Global Investment in Clean Energy and Fossil Fuels in 2025](#)
- [Asian Fintech Usage Keeps Rising Even As Funding Has Lost Momentum](#)
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