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India Data Center Market - Investment Analysis and Growth Opportunities 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this India Data Center Market Report

The India data center market size will witness investments of USD 8 billion by 2026

India is one of the developing data center markets in the APAC region. The data center market includes around 23 unique third-party data center service providers operating around 80 facilities. The country has several on-premise or dedicated data centers owned by local enterprises. Over the past few years, the market has grown significantly with the rise in the development of hyperscale data centers. The country is witnessing investments in more than 15 facilities, which is expected to be operational in the next 2-3 years. The COVID-19 pandemic has been a strong market enabler for digital transformation initiatives in private as well as public enterprises in India.

The report considers the present scenario of the India data center market and its market dynamics for the forecast period 2021?2026. It covers a detailed overview of several growth enablers, restraints, and trends in the market. The study includes the demand and supply aspect of the market.

Key Highlights of the Report:

The deployment of 5G networks is likely to boost the digital economy and enhance high bandwidth networking infrastructure demand.

1 GbE switches are likely to be replaced by 10 GbE or 25 GbE

switches among on-premise data centers during the forecast period.

Due to the COVID-19 impact, the demand for flash arrays that offer high-storage performance is likely to grow significantly.

Cloud-service providers, BFSI sectors, retail and e-commerce, manufacturing, and professional services are the leading revenue contributors to the Indian server market.

The adoption of VRLA batteries is likely to decline slowly due to the growing acceptance of lithium-ion batteries increases during the forecast period.

Adopting medium- and high-voltage switchgear is high in over 10 MW data centers, whereas low-voltage switchgear is more likely to be adopted in modular data centers.

The increasing demand for edge facilities will lead to the adoption of high bandwidth switches and wireless equipment.

The number of OCP-ready data center spaces will continue to grow as several cloud-based and internet-based service providers are considering adopting OCP architecture-based IT infrastructure systems, which are likely to increase the adoption of 48U racks.

The use of dual water feeds with on-site water treatment plants is gaining popularity in India, which increases the investment in the mechanical infrastructure.

India Data Center Market Insights

According to the Department of Telecommunications (DoT), the data consumption touched 300 PB between March 22 and March 28 2020, during the nationwide lockdown.

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Initiatives such as Digital India, the government’s flagship program that is transforming the country into a digital knowledge economy, are likely to lead to India's development of data centers.

In 2020, government-owned organizations such as the National Payments Corporation of India, State Bank of India, and Information Technology Department Tamil Nadu invested in data centers to improve the digital (cloud-based) services offered by various government agencies in the country.

Due to the COVID-19 lockdown, India has witnessed a growth of over 30% in internet usage consumption. The demand for data centers has gone up because of increased access to internet-related services by organizations across various sectors.

In July 2020, seven universities in India adopted cloud computing curricula as a mainstream college syllabus from Amazon Web Services Educate.

Hyperscale operators such as Microsoft (Pune data center) and Google (second cloud region in Delhi) plan to open their facilities by the end of 2021.

The Department of Telecommunications (DoT) expects to hold spectrum auctions for 5G networks in late 2021 and allocates around USD 33 million to set up an “Indigenous 5G Test Bed.”

According to the Central Electricity Authority of India, renewable energy constituted around 23% (87 GW) of the installed capacity in India. There is significant growth in the procurement of renewable energy sources among data centers in India.

India Data Center Vendor Landscape :

The Indian data center market consists of several IT, electrical, and mechanical infrastructure providers. Arista Networks, Atos, Broadcom, Cisco Systems, Dell Technologies, Hewlett Packard Enterprise (HPE), Huawei Technologies, IBM, Juniper Networks, Lenovo, NetApp, NEC Corporation are some of the major IT infrastructure providers in the region. Infrastructure vendors are likely to offer innovative products that help to reduce power consumption and improve efficiency during the forecast period. The market is also likely to witness high demand for UPS and generators of varied capacities in small, medium, and large facilities. The demand for high-capacity systems with 2N redundant configuration is expected to increase over the next few years. The Indian data center market is witnessing intense competition among local service providers as several operators are rapidly expanding their operations.

IT Infrastructure Providers

Arista Networks

Atos

Broadcom

Cisco Systems

Dell Technologies

Hewlett Packard Enterprise (HPE)

Huawei Technologies

IBM

Juniper Networks

Lenovo

NetApp

NEC Corporation

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Construction Service Providers

AECOM

DSCO Group

Larsen & Toubro (L&T)

Prasa

Sterling and Wilson (Shapoorji Pallonji Group)

Turner & Townsend

Vastunidhi

Support Infrastructure Providers

ABB

Blue Box (Swegon)

Caterpillar

Cummins

Climaveneta Climate Technologies (Mitsubishi Electric)

Delta Electronics

Eaton

Kirloskar Oil Engines Ltd (KOEL)

Legrand

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NetRack Enclosures

Panduit

Rolls-Royce Power Systems

Rittal

Reillo Elettronica Group (Riello UPS)

Schneider Electric

Siemens

STULZ

Vertiv Group

Data Center Investors

Airtel India (Nxtra Data)

CtrlS

NTT Global Data Centers (Netmagic)

Pi Data Centers

RackBank

Reliance Jio Infocomm

ST Telemedia Global Data Centres India

Sify Technologies

Web Werks

Yotta Infrastructure (HIRANANDANI GROUP)

New Entrants

Adani Group (AdaniConneX)

Bridge Data Centres

Colt Data Centre Services (COLT DCS)

Equinix (GPX Global Systems)

Mantra Data Centers

Princeton Digital Group (PDG)

Report Coverage:

This report on the India Data Center market offers an elaborative analysis of the existing and upcoming facilities, datacenter investments in terms of IT, electrical, mechanical infrastructure, general construction, and geography. It discusses market sizing and estimation for different segments concerning the investment in data centers. The segmentation includes:

Exisiting Vs. Upcoming Data Centers

Existing Facilities in the region (White Floor Area and Power Capacity)

Maharashtra

Tamil Nadu

Karnataka

Telangana

West Bengal

- Uttar Pradesh
- Other States
- List of Upcoming Facilities in the region (White Floor Area and Power Capacity)

India Data Center Investment Coverage:

- Infrastructure Type
  - IT Infrastructure
  - Electrical Infrastructure
  - Mechanical Infrastructure
  - General Construction
- IT Infrastructure
  - Server
  - Storage
  - Network
- Electrical Infrastructure
  - Uninterruptible Power Supply (UPS)
  - Generators
  - Transfer Switches and Switchgears
  - PDUs
  - Other Electrical Infrastructure

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- Mechanical Infrastructure
  - Cooling Systems
  - Racks
  - Other Mechanical Infrastructure
- General Construction
  - Core and Shell Development
  - Installation and Commissioning Services
  - Building Design
  - Physical Security
  - DCIM
- Tier Segments
  - Tier I & Tier II
  - Tier III
  - Tier IV
- Geography
  - Maharashtra
  - Tamil Nadu
  - Other Cities

Target Audience:

Datacenter Real Estate Investment Trusts (REIT)

Datacenter Construction Contractors

Datacenter Infrastructure Providers

New Entrants

Consultants/Consultancies/Advisory Firms

Corporate and Governments Agencies

Why Should You Buy This Research Report?

Market size available in the area, power capacity, investment, and colocation revenue.

An assessment of the India data center investment in the market by colocation, hyperscale, and enterprise operators

Data center investments in terms of white floor area (square feet) and power capacity (MW) across cities in the country

A detailed study of the existing India data center market landscape, an in-depth industry analysis, and insightful predictions about the India data center market share during the forecast period

Snapshot of existing and upcoming third-party facilities in India

Facilities Covered (Existing): 79

Facilities Identified (Upcoming): 23

Coverage: 6 Prominent States & Other States

Existing vs. Upcoming (Data Center Area)

Existing vs. Upcoming (IT Load Capacity)

Data center colocation market in India

Market Revenue & Forecast (2020-2026)

Retail Colocation Pricing

Wholesale Colocation Pricing

Classification of the India data center market investments into multiple segments and sub-segments (IT, power, cooling, and general construction services) with market sizing and forecast

A comprehensive analysis of the latest trends, growth rate, potential opportunities, and growth restraints, and future market prospects for the data center market

Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the market

A transparent market research methodology and the analysis of the demand and supply aspect of the market

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