

# Indian Datacenter Power and Cooling Market

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## Abstracts

### Indian Datacenter Power and Cooling Market – Forecast up to 2025

This market research report includes a detailed analysis of the Indian datacenter power and cooling market with segmentation by vertical (IT and telecom, media and entertainment, public sector healthcare/life sciences, BFSI, travel, retail, manufacturing, and others), by city (Mumbai, Hyderabad, Bangalore, NCR, and Other Cities), by power, and by cooling. In this report, the power & cooling segment for the datacenter market is considered as the market scope and segmented addressable market with the Indian datacenter market considered as the total addressable market.

The report highlights the vendors, which include Schneider Electric, Legrand, Eaton, Emerson, and Cummins as key players. These players provide power and cooling equipment for Indian datacenters to enhance datacenter operation efficiency.

The report also includes key companies in the ecosystem; the power and cooling technology vendors will be affected by the performance of Sify Technologies, Prasa Infocom, L&T, CtrlS, and Netmagic that are key players in their respective domains. These players hold a key role and partnership with these companies will yield better results, i.e., acquiring new clients, increasing vendor ecosystem, and many more.

### Overview of the Datacenter market in India

Infoholic's market research report predicts that the Indian datacenter power and cooling market will grow at a CAGR of more than 9% during the forecast period 2019–2025. The market for Indian datacenter power and cooling is driven by the growing demand for IaaS, SaaS, and PaaS among organizations, increase in Internet population, use of smart devices, and social media growth.

After the spurt of colocation DC providers, organizations have found an easier way to tackle the data storage problem through third-party managed services using their expertise to handle the storage-related issues and billed monthly based on usage. This also eases the capital expenditure (CapEx) and operational expenditure (OpEx) of organizations to own a datacenter and hire staff to operate it.

Reliable power supply, professional, and value-added services offered by third-party services are tipping the market share in colocation service providers' favor. The Indian colocation DC market is growing, with many organizations moving toward colocation services from captive DC to address the issues of scalability and higher CapEx.

Favorable government regulations and the emergence of alternative sources of power and cooling technologies provide huge opportunities for the vendors operating in this segment. The growth in datacenters mainly attributes to the growth in data, which is estimated to generate more than 150 zettabytes of data by 2025. Modernization of datacenters is a necessity today as a datacenter becomes obsolete in 7–8 years' time.

Due to the growth of data and cloud services, datacenters are expected to grow at a CAGR of 9.1% in India, up from \$1,062.7 million in 2018 to \$1,950.0 million by 2025. The IT and telecom vertical holds the largest market share in 2019 due to the vertical's affinity toward technology and also the technological know-how. The public sector is estimated to be the fastest-growing vertical due to favorable government initiatives, such as smart cities and the MeghRaj initiative. Internet users in India have crossed 560 million in 2019 due to the government's efforts for last-mile connectivity to rural areas. To tap into this great potential, many companies are striving across verticals to provide digital services.

Mumbai is a preferred location for DC vendors due to the presence of multiple Power Genco companies offering services and also for being the financial capital of India. Hyderabad is an upcoming city as the best suitable location for disaster recovery services.

The power & cooling segment of the Indian datacenter market is estimated to be \$623.3 million in 2019 and is expected to reach \$1,065.5 million by 2025, growing at a CAGR of 9.4% during the forecast period 2019–2025.

New technologies, including Li-ion battery usage for storage and new cooling technologies, will play a vital role in determining DC space required per server. These factors will reduce floor space usage and increase server/sq. ft. ratio in DCs. DC

efficiency will be increased, and this is expected to impact directly during the forecast period.

DCs procure power lines from more than one transformer to maintain consistency in power so that the servers are online even when one line is down as redundant source. Power is the most important component of a datacenter. It is the component with the second-highest expenditure after construction and real-estate. The competition between colocation vendors to provide best infrastructure with highest uptime and lowest PUE is driving DC vendors to spend for better technology and good quality products in the power segment. Cooling technologies are evolving with the increase in data. Many new technologies, such as cryptocurrencies, AI, and ML, that feed on data have increased the importance of datacenter and server efficiency. Redundancy for power and cooling is a major factor for datacenter. Redundancies may account for a huge portion of CapEx in India due to the unexpected power cuts or technical failures in various components.

The recent spurt in the eCommerce sector through online marketplace spread has driven the datacenters market in India. For example, Flipkart has launched its second datacenter in India, partnering with CtrlS (a colocation service provider).

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## **COMPANIES MENTIONED**

Schneider Electric, Legrand, Eaton, Emerson, and Cummins

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