

India Data Centre Market Assessment, By Type (Tier I, Tier II, Tier III and Tier IV), By Model Type [Enterprise (On-Premises), Outsourced (Managed Data Centres and Colocation Facilities, Cloud Data Centres)], By Infrastructure Components [Servers, Storage Systems, Networking, Others], By Enterprise Size [Small and Medium Enterprises, Large-Scale Enterprises], By End-User Industry [IT and Telecommunications, BFSI, Defence, Media and Entertainment, Others], By Region, Opportunities and Forecast, FY2018-FY2032F

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Abstracts

Market is valued at USD 6.61 billion in FY2024 and is expected to reach USD 23.23 billion by FY2032. Moreover, the market is projected to register a robust CAGR of 17.01% during the forecast period (FY2025-FY2032F) on account of the rise of remote learning, digitization of business operations and increased adoption of digital technology by small and medium enterprises. The development of the IT sector which is influenced by several government initiatives including Make in India is one the major factors boosting the market growth. The rising demand for cloud services, digital transformation and the development of data-hungry technologies including machine learning, IoT and AI, the market size for the India Data Centre rises.

Furthermore, the growing demand for data storage and processing emergence of new technologies has contributed to the market progress. The rise of e-commerce and the usage of social media have led to an increase in the number of data centres in India.

Also, the rising demand for online services is being driven by the rising number of internet and mobile users in India.

Another important element boosting market expansion in India is favourable government assistance in the form of tax incentives. The governments of Telangana, Gujarat, Andhra Pradesh and Maharashtra are offering substantial incentives for the establishment of data centres. For instance, the government of Andhra Pradesh declared that it will offer a 50% SGST refund on the procurement of raw materials and equipment for a period of three years after the date the project was approved. As a result, increased government funding is anticipated to have an impact on the growth of data centres in India.

Rising Digital Transformation Drives the India Data Centre Market

Rising digital transformation in different sectors is a significant driver for India data centre market growth in the forecast period. Companies are significantly embracing cloud computing, Internet of Things, big data analytics, and artificial intelligence (AI) technologies to improve competitiveness and effectiveness. This digital shift is introducing a rapid surge in data creation, requiring robust and scalable data storage solutions. In addition, the adoption of these advanced technologies is prevalent in industries including healthcare, banking, financial services, and insurance (BFSI), e-commerce, and others. As these sectors demand digitalization in their operations and migrate to cloud-based platforms, coupled with high-performing data centres, which further drives the India data centre market growth in the forecast period. Furthermore, companies in the market are announcing partnership and increasing investments to establish new data centres in India and transform different sectors.

For instance, in January 2025, Microsoft announced the partnership with key Indian organizations and a USD 3 billion investment in cloud infrastructure and artificial intelligence to transform sectors including finance, healthcare, railways, and education.

Easy Adoption of Cloud Services

The need for data processing and storage is rising as many emerging businesses are transitioning to cloud-based services. Data centres offer dependable, secure storage and processing solutions, thereby benefiting market growth. Many small and medium-sized businesses are switching to cloud-based services as it declines expenditures related to infrastructure, maintenance and other.

Cloud service in India is so robust and easy to achieve that almost everyone in the country has at least 1 cloud storage provider. All email service providers including Google, Microsoft and Yahoo provide at least 5GB storage free for life; similarly, all mobile phone companies, telecom service provider, broadband service provider, firewall and antivirus providers are also providing cloud service for either free or charge a nominal fee for the same.

Classification of Data Centers as Assets

The Government of India announced to classify Data Centers as Assets class from 1st April 2022, which made it easier for data center firms to raise funds and has already impacted the Indian market positively. In May 2023, Andhra Pradesh Government approved setup of a new data center in a tech park in Vizag, fueled by Adani Group and shall cost USD 2.7 billion (Rs. 21,844 Crore). In Vizag Tech Park, 2 data centers will be established a 200 MW Integrated Data Centre at Madhurawada and another one of 100 MW at Kapuluppada.

Government Initiatives Have Propelled the Growth

According to the Ministry of Electronics and Information Technology (MeitY), the 'Digital India' plan is expected to increase the nation's digital economy to USD 1 trillion by FY2025. As technology advances, so does the amount of data created and the need for data centres. Moreover, with the rollout of 5G technology in the nation, data is anticipated to grow much faster, thereby impacting market growth.

Impact of COVID-19 on India Data Centre Market

The pandemic has had a significant impact on the India data centre market. The operations and the data centres' role in supporting the digital economy has affected the market. A considerable growth is witnessed in demand for digital services, such as online shopping, streaming video and video conferencing, as more individuals are opting for work from home. Data centre capacity has been in demand because of the rise in data traffic. On other hand, the pandemic disrupted supply chains, which caused delays delivery of components and equipment. Furthermore, people were hesitant to work in close proximity to others, which made it challenging to maintain staffing levels.

Impact of Russia-Ukraine War on India Data Centre Market

Although India has maintained cordial ties with both Russia and Ukraine, but the

escalation of hostilities between the two nations has affected India's IT industry by disrupting international commerce, investment and project flow. The conflict between Russia and Ukraine has caused supply chain disruptions which have affected the availability and cost of data centre components and equipment in India. The outcome of the war and how it develops over time will determine how it affects the India data centre market.

Key Players Landscape and Outlook

Information is the most vital component for any business, which is stored as Data. Organizations consider various aspects before choosing any data centre including reliability, location, scalability, network services capacity and security are some important considerations. Many companies operate in India data centre market including NTT Limited (Nippon Telegraph and Telephone Ltd.), CtrlS Datacenters Ltd., Nxtra Data Ltd. (By Bharti Airtel Ltd.) and Equinix, Inc.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed during course of work

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