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India Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The India Data Center Market size is estimated at 2.01 thousand MW in 2024, and is expected to reach 4.77 thousand MW by 2029, growing at a CAGR of 18.79%. Further, the market is expected to generate colocation revenue of USD 1,926.1 Million in 2024 and is projected to reach USD 4,597.3 Million by 2029, growing at a CAGR of 19.00% during the forecast period (2024-2029).

Tier 3 data center accounted for majority share in terms of volume in 2023, and is expected to dominate through out the forecasted period

The growing urban population's adoption of smart technologies and attractive incentives offered by state governments has led data center operators setting up huge data processing facilities in the country.

As businesses evolve in India, large businesses increasingly focus on tier 3 and tier 4 data centers due to their lower downtime, disaster recovery, and onsite assistance facility. This has led to the growth of tier 3 and tier 4 data centers in the region.

Tier 3 data centers are expected to grow from 888.5 MW in 2022 to 3365.0 MW by 2029 at a CAGR of 16.20%. Similarly, tier 4 data centers operated at a capacity of 211.9 MW in 2021. This capacity is expected to increase from 211.9 MW in 2022 to 1380.2 MW by 2029 at a CAGR of 29.54%.

As a result of low demand, tier 1 & 2 data center is expected to stagnate during the forecast period.

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India Data Center Market Trends

Growth of telecom operators such as Jio, and others providing smartphones and internet services at resonable rates, it has boosted the data centers market

Indian smartphone users are expected to grow from 794.4 million in 2022 to 1.2 billion in 2029 at a CAGR of 5.52%. Government initiatives such as the “Make in India” movement have offered incentives to the smartphone industry, which has resulted in India producing smartphones with specifications that run applications seamlessly and at an affordable cost.

The growth of telecom operators, such as Jio, has revolutionized the internet industry with their packages at a reasonable cost. In addition to that, the data demand increased continuously, with the government encouraging digital payments and services online.

With the launch of the 5G network in India, data consumption is expected to rapidly increase, as Indian users have a heavy inclination toward online OTT content, gaming, shopping, smart home automation applications, online security cams, etc., which is expected to further propel the demand for data centers.

Increasing household access to broadband and growing Internet exchanges are driving the market growth.

A copper-based internet connection provides speeds of up to 300 Mbps whereas a fiber optic internet speeds are upto 10 Gbps. Earlier, the broadband network in India was more inclined toward copper cable connections. New innovations such as cloud technology have led to the adoption of fiber optic cables that offer higher speeds to move data stored in the cloud. Users are switching to fiber optic cables, which connect cloud servers with data centers. Hence, in terms of connectivity, the demand for copper cables is on the decline.

Broadband connections rose from 6.1 crore in March 2014 to 81.62 crores in September 2022 growing by 1238%. The flagship BharatNet project is being implemented in phases to give broadband access to all 2.6 lakh Gramme Panchayats

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(GPs) in the country. Phase-I was finished in December 2017 and covered over 1 lakh GPs. As of October 2022, 6,00,898 km of Optical Fibre Cable had been laid under the project, 1,90,364 GPs had been connected by Optical Fibre Cable (OFC), and 1,77,665 GPs were Service Ready on OFC. Furthermore, 4466 GPs have been linked by satellite media. 1,82,131 GPs are ready to serve. This statistic shows an increase in broadband data usage.

The growing urban population increasingly uses devices such as smart TVs, smartphones, and smart lighting systems, which has led to increased demand for higher bandwidth speeds that can only be achieved through the use of these fiber optic cables.

India Data Center Industry Overview

The India Data Center Market is fragmented, with the top five companies occupying 36.48%. The major players in this market are Equinix Inc., NTT Ltd, Nxtra Data Ltd, Sify Technologies Ltd and STT GDC Pte Ltd (sorted alphabetically).

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