

India Data Center Server - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2030

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Report description:

The India data center server market reached a value of USD 5.2 Billion in the previous years, and it is further projected to register a CAGR of 7.7% during the forecast period. The increasing demand for cloud computing among (small and medium-sized enterprises) SMEs, government regulations for local data security, and growing investment by domestic players are some of the major factors driving the demand for data centers in the country/region.

Key Highlights

- Under Construction IT Load Capacity: The upcoming IT load capacity of the India data center market is expected to reach 4138.13 MW by 2029.
- Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 14.2 million sq. ft by 2029.
- Planned Racks: The country's total number of racks to be installed is expected to reach 711K units by 2029. Mumbai is expected to house the maximum number of racks by 2029.
- Planned Submarine Cables: There are close to 22 submarine cable systems connecting India, and many are under construction. One such submarine cable that is estimated to start service in 2023 is India Asia Xpress (IAX), which stretches over 5,791 Kilometers with landing points from Chennai and Mumbai.

India Data Center Server Market Trends

IT and Telecom to Hold Significant Growth

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- The demand for data center servers in the IT and telecom industry is rising with increasing network traffic. Telecom data centers are responsible for managing network resources, such as vRAN and 5G packet core, while IT data centers are responsible for the IT applications used by the telecom service. While telecom data centers historically provide connectivity through a traditional and monolithic platform, they now offer a variety of services in an environment that meets the requirements for availability, scalability, security, and performance.
- Currently, India is the world's second-largest telecommunications market, with a subscriber base of 1,170.75 million in January 2023, and has registered strong growth in the last decade. The Indian mobile economy is growing rapidly and will contribute substantially to India's Gross Domestic Product (GDP). The Tele-density of rural subscribers reached 57.71% in March 2023. From around 4,200 petabytes in 2018, India's overall wireless internet data usage has increased by almost 7 times to 32,397 petabytes in 2021.
- The industry's exponential growth over the last few years is primarily driven by affordable tariffs, wider availability, roll-out of Mobile Number Portability (MNP), expanding 3G and 4G coverage, evolving consumption patterns of subscribers, Government's initiatives towards bolstering India's domestic telecom manufacturing capacity, and a conducive regulatory environment. To further expedite digital connectivity, the Government has approved the auction of IMT/5G spectrum for deployment of 5G services within the country. This auction was successfully held by the end of July 2022 and crossed USD 18.77 billion.
- India's 5G subscriptions will have 350 million by 2026, accounting for 27% of all mobile subscriptions. By 2025, India will need around 22 million skilled workers in 5G-centric technologies such as Internet of Things (IoT), Artificial Intelligence (AI), robotics and cloud computing. Over the next five years, a rise in mobile phone penetration and a decline in data costs will add 500 million new internet users in India, creating opportunities for new businesses. Such a factor states the demand for data center servers in the country.

Rack Server to Hold Significant Share

- Rack servers are compact and efficient devices that can handle a variety of computing tasks and are commonly used in data center environments where space is at a premium. The advantages of a server rack include increased scalability, maximized airflow when coupled with a cooling system, and ease of regular computer maintenance and diagnostics. In India, various end users prefer rack servers due to the above advantage, and with increasing digitalization, the market is expected to increase.
- The Indian banking industry has recently introduced new banking formats, such as payments and small financial institutions. In recent years, India has concentrated on expanding its banking sector reach through various initiatives such as the Pradhan Mantri Jan Dhan Yojana and Post Payment Banks. These schemes, combined with key banking sector reforms such as digital payments, neo-banking, the rise of Indian NBFCs, and fintech, have considerably improved India's financial inclusion and helped fuel the country's credit cycle.
- The majority of Indian people are switching to Internet payment methods. To encourage digitization in the nation, the government is also working together. The Reserve Bank of India (RBI) announced the start of its first worldwide hackathon, HARBINGER 2021 - Innovation for Transformation, with the 'Smarter Digital Payments' theme in November 2021. Furthermore, In July 2021, Google Pay for Business enabled small merchants to receive credit through a partnership with FlexiLoans, a digital lending platform for small and medium-sized enterprises (SMEs).
- Since the pandemic, cloud computing has evolved as a mission-critical technology for businesses, governments, and consumers. It is not only the foundational technology for digital transformation but also allows for innovation and collaboration among ecosystem stakeholders. In 2021, 53% of enterprises have increased their cloud adoption compared to the previous year. 84% of the organizations have adopted (software-as-a-service) SaaS, and the penetration is increasing on a yearly basis.
- Cloud computing will account for 8% of India's GDP by 2026. Indian enterprises adopting public cloud have spent an average of INR 3.7 billion (USD 0.045 billion) on it in the past 12 months from July 2023. Overall, the market is expected to hold significant demand for the rack server due to its potential advantage.

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India Data Center Server Industry Overview

The India data center server market is fairly fragmented among the players and has gained a competitive edge in recent years. A few major players are Hewlett Packard Enterprise, Dell Inc., IBM Corporation, and others. These major players with a prominent market share focus on expanding their customer base across the region. These companies leverage strategic collaborative initiatives to increase their market share and profitability.

In July 2023, Supermicro, Inc. announced several new servers to its already broad application-optimized product line. These new servers incorporate the new AmpereOne CPU, with up to 192 single-threaded cores and up to 4 TB of memory capacity. Applications such as databases, telco edge, web servers, caching services, media encoding, and video gaming streaming will benefit from increased cores, faster memory access, higher performance per watt, scalable power management, and the new cloud security features.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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