

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

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Report description:

The India Data Center Storage Market size is estimated at USD 2.53 billion in 2024, and is expected to reach USD 5.77 billion by 2030, growing at a CAGR of 14.68% during the forecast period (2024-2030).

The increasing demand for cloud computing among 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, leading to a growing need for data center storage equipment.

Key Highlights

- The upcoming IT load capacity in the region is expected to reach 4,700 MW by 2029, which is projected to positively impact the demand for data center racks during the forecast period.
- The construction of raised floor areas for data centers in the region is expected to reach 14.2 million sq. ft by 2029 for under-construction raised floor space.
- The region's total number of racks to be installed is expected to reach 710,000 units by 2029.
- Currently, 15 submarine cable projects are under construction in the region. One such submarine cable, estimated to start service in 2024, is India Europe Xpress (IEX), stretching over 9775 kilometers with landing points in Mumbai.

India Data Center Storage Market Trends

IT & Telecommunication Segment to Hold Major Share in the Market

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- With the growth of data-intensive technologies, cloud computing, and digital services, businesses generate and process larger amounts of data. Data centers must scale their storage infrastructure to accommodate this increased workload. This may include adding flash storage and drives to existing data centers or building new data centers. The increase in the number of data centers is directly related to the demand for storage devices in IT infrastructure. As data centers increase, more storage devices are required to meet the growing computing needs.
- Data centers are critical to national security, internet infrastructure, and economic performance. The country is experiencing rapid growth in its data center infrastructure, driven by a growing preference for the cloud and increased consumption and generation of data by increasing numbers of digital users. This increases the usage of data centers and, simultaneously, increases the use of storage devices in data centers, positively impacting the market.
- Demand for new data centers is skyrocketing, with hyperscale facilities needed by major internet providers such as Amazon Web Services (AWS), Microsoft, Google Cloud, and Alibaba Cloud to power their clouds. This will promote the domestic data center storage market and increase the market revenue.
- Data center workloads are also increasing due to the increasing demand for improved application performance, storage requirements, and mobile data usage due to the increasing number of applications and increased internet usage. As a result, more and more businesses around the world are moving to cloud data storage, increasing the demand for data center services. As a result, the use of data center storage is increasing in the country.
- The continued increase in the use of smartphones with increasing adoption of 5G networks among users, increased data traffic, and increased e-commerce, including mobile phones and computer games, has given the telecommunications sector its dominance. It will positively impact the growth of data centers in the country. This will increase the need for data storage, thus, increase the demand for data center storage equipment, and increasing market value.

Hybrid Storage Expected To Hold Significant Share

- The combination of on-premises and cloud storage solutions is known as data center hybrid storage. This approach takes advantage of the best of both environments and provides the flexibility to store and manage data on-premises and in the cloud.
- With India as a critical growth market, cloud service providers continued expanding their presence nationwide by announcing new data centers/cloud regions to improve their service delivery capabilities with BFSI and manufacturing leading the public cloud adoption, service providers saw rising demand from other verticals such as the public sector, media, and gaming. This has given rise to data centers that use hybrid storage-introducing hybrid storage that combines the functionality of hard drives and SSDs. The cache is used for frequently accessed data, so it takes advantage of the fast access capabilities of an SSD and the greater storage capacity of a hard drive.
- Since the pandemic, cloud computing has become a mission-critical technology for businesses, governments, and consumers. It is the foundational technology for digital transformation and allows for innovation and collaboration among ecosystem stakeholders. The companies are growing businesses and providing adequate customer service; hence, the requirement of storing and processing intense data creates the need for hybrid storage.
- As businesses continue to grow, data centers are expanding and adapting to meet the growing connectivity needs of various industries and increasing internet use. Companies increasingly rely on hybrid infrastructure and cloud capabilities to seek flexibility, scalability, and remote work capabilities. Data traffic is also increasing, and thereby, the need for storage for businesses is increasing in importance, thus increasing the market value for hybrid storage solutions.
- Several service providers deploy advanced storage solutions to ensure data availability and access in hybrid clouds. The companies are offering optimized hybrid storage systems. For example, HPE GreenLake, an updated app and data product, also introduced platform upgrades and new cloud services in 2022. Therefore, this product portfolio is adopted by large enterprises with large data storage capacities. This demands hybrid storage in the country.

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India Data Center Storage Industry Overview

The India Data Center Storage is moderately fragmented. The major players in this market hold the majority of the market share. Some significant players are Dell Inc., Hewlett Packard Enterprise, NetApp Inc., Hitachi Vantara LLC, and Kingston Technology Company Inc. These companies leverage strategic collaborative initiatives to increase their market share and increase their profitability.

June 2023: Hewlett Packard Enterprise expanded its SaaS and NaaS product portfolio to HPE GreenLake and added HPE SaaS products to AWS Marketplace. The HPE Aruba Networking CX 8000, HPE Aruba Networking 9000, and HPE Aruba Networking 10000 Series data center switching portfolio is now available via Network as a Service (NaaS). The two new HPE GreenLake for Aruba networking service packs allow partners to expand into data center networking and bundle their design and delivery services with a monthly NaaS technology subscription, enabling customers to consume a full compute, storage, and networking data center stack via HPE GreenLake.

March 2023: Hewlett Packard Enterprise has acquired OpsRamp, an IT operations management company. OpsRamp's hybrid digital operations management solution, integrated with the HPE GreenLake edge-to-cloud platform and supported by HPE Services, reduces the complexity of operating multivendor and multi-cloud IT environments in the public cloud (colocation). On-premises. OpsRamp and HPE GreenLake Edge-to-Cloud Platform provide an integrated approach to managing multivendor compute, network, storage, and application resources in hybrid and multi-cloud IT environments.

Additional Benefits:

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

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