

India Data Center Colocation Market - Supply & Demand Analysis 2024-2029

Market Report | 2024-12-10 | 53 pages | Arizton Advisory & Intelligence

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Report description:

The India data center colocation market is expected to grow at a CAGR of 24.68% from 2023 to 2029.

India's colocation landscape currently includes 109 operational facilities, managed by OVER 25 different providers across 20+ cities. These facilities collectively offer a total power capacity of over 1,010 MW, reflecting India's growing demand for digital infrastructure.

The India data center colocation market has the presence of several global and local colocation operators, such as NTT Global Data Centers, ST Telemedia Global Data Centres, Nxtra by Airtel, Equinix, Sify Technologies, Digital Realty, CtrlS, AdaniConneX, and Yotta Infrastructure. Furthermore, various industrial centers drive India's digital environment, from Electronic City in Bengaluru to Tidel Park in Chennai and the Noida Special Economic Zone (NSEZ). State governments actively encourage data center expansion by granting industrial lands to operators, thus promoting the development of data centers across the country. Colocation operators are also involved in adopting several sustainability measures to reduce carbon emissions from data center facilities. For instance, Nxtra by Airtel became the first operator in the country to deploy fuel cell technology supplied by Bloom Energy, which will be initially powered by natural gas and later shift to 50% hydrogen gas. Furthermore, the average rack power density in India is around 3-5 kW, which is likely to increase to 12-14 kW by 2029 through the increased deployment of Big data, IoT, AI, and ML workloads and the entry of hyperscalers/cloud operators in the industry.

A spike in cloud-computing usage drives the demand for wholesale/hyperscale colocation, which is backed by key providers, such as Google, Microsoft, AWS, Oracle, IBM Cloud, and others. This spike is projected to support the India data center colocation market growth. Also, the AI revolution will continue to grow the demand for hyperscale space from major global cloud operators, such as Amazon Web Services (AWS), Google, Meta, Microsoft, and Oracle. Therefore, the cloud & IT sector is likely to account for over 75% share of the colocation demand by 2029.

WHATS INCLUDED?

- ☐Transparent research methodology and insights on the colocation of demand and supply.
- ☐Market size is available in terms of utilized white floor area, IT power capacity, and racks.
- ☐Market size available in terms of Core & Shell Vs Installed Vs Utilized IT Power Capacity along with the occupancy %.

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- Study of the existing India data center industry landscape and insightful predictions about industry size during the forecast period.
- An analysis of the current and future colocation demand in India by several industries.
- Study on sustainability status in India
- Analysis of current and future cloud operations in the region.
- Snapshot of upcoming submarine cables and existing cloud-on-ramps services in the region.
- Snapshot of existing and upcoming third-party data center facilities in India
- o□ Facilities Covered (Existing): 109
- o□ Facilities Identified (Upcoming): 82
- o□ Coverage: 20+ locations
- o□ Existing vs. Upcoming (White Floor Area)
- o□ Existing vs. Upcoming (IT Load Capacity)
- Data Center Colocation Market in India
- o□ Colocation Market Revenue & Forecast (2023-2029)
- o□ Retail Colocation Revenue (2023-2029)
- o□ Wholesale Colocation Revenue (2023-2029)
- o□ Retail Colocation Pricing along with Addons
- o□ Wholesale Colocation Pricing along with the pricing trends.
- An analysis of the latest trends, potential opportunities, growth restraints, and prospects for the India data center colocation market.
- Competitive landscape, including industry share analysis by the colocation operators based on IT power capacity and revenue.
- The vendor landscape of each existing and upcoming colocation operator is based on the existing/ upcoming count of data centers, white floor area, IT power capacity, and data center location.

VENDOR LANDSCAPE

Existing Operators

- NTT Global Data Centers
- ST Telemedia Global Data Centres
- CtrlS Datacenters
- Sify Technologies
- Nxtra by Airtel
- Yotta Infrastructure
- AdaniConneX
- Princeton Digital Group
- Other Operators

New Colocation Operators

- Colt Data Centre Services
- Larsen & Toubro
- Digital Connexion

KEY QUESTIONS ANSWERED:

- 1.□ What is the count of existing and upcoming colocation data center facilities in India?
- 2.□ What factors are driving India data center colocation market?
- 3.□ How much MW of IT power capacity is likely to be utilized in India by 2029?

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4. Who are the new entrants in the Indian data center industry?

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