India Data Center Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)

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Report description:

The India data center market was valued to reach a market size of USD 4410.00 Million in 2024 . The industry is expected to grow at a CAGR of 14.10% during the forecast period of 2025-2034. India data center market is driven by the expansion of the 5G technology, favourable governmental initiatives, and the growth in digital businesses and payments. These further aids to attain a valuation of USD 16492.82 Million by 2034 .

India Data Center Market Overview

In 2023, India was ranked the 13th largest data center market in the world with 138 data centers. Key data center hubs in India include Bengaluru, Hyderabad, Noida (Delhi-NCR), Pune, and Kolkata. Mumbai is the prime hub for data centers in India, attracting demand from BFSI, media, and IT sectors.

Data centers store and share applications and data. The growth in India's data usage in both urban and rural areas supports the demand for data centers. In 2024, the total number of internet subscribers was 954.40 million, of which 398.35 million were rural internet subscribers.

India is seeing a rise in green data centers that reduce their environmental impact by utilising energy-efficient technologies and renewable energy sources like solar, wind, and hydropower. Nxtra by Airtel and the Hiranandani Group are leading the way with their focus on renewable power for data center operations, supporting the India data center market development.

The growth of the e-commerce sector is increasing the demand for data centers to host the web and back-end infrastructure that run the online facilities. By 2026, the Indian e-commerce market is projected to reach USD 163 billion, further driving the need for data centers.

The Indian government has undertaken multiple initiatives such as Digital Communications Innovation Square (DCIS) and Telecom Technology Development Fund (TTDF), to promote 5G subscriptions. During 2023-2040, 5G is expected to contribute approximately USD 455 billion to India's economy.

As per India data center market report, India is well-positioned to become a leading data center hub in Asia, driven by the rise of 5G, increased internet usage in Tier 2 and 3 cities, and the growing demand for the Internet of Things (IoT) and Artificial Intelligence (AI).

According to 2024 data, Mumbai accounts for the largest of 54.9% or 517.2MW of the national data center stock. Mumbai also has more data center capacity under development (1,209MW) than the rest of the country combined.

Figure: India Data Center Stock by City, 2024

The demand for 5G is driven by a surge in digital activities such as streaming, gaming, and social media driving higher data consumption.

By 2030, 5G will account for more than a third of total connections in India. During 2023-2040, 5G is expected to contribute approximately USD 455 billion to India's economy. The 5G device ecosystem in India is rapidly evolving. In 2023, 17% of active 4G devices were 5G capable, totalling 134 million out of 796 million devices.

Figure: Top Internet Service Providers by Subscribers, 2024

India Data Center Market Growth

Key industries such as manufacturing, retail, healthcare, and agriculture are incorporating the 5G technology to improve efficiency. By 2030, India's 5G market is expected to have 970 million subscribers. Furthermore, the growth in smart city projects aids 5G adoption. According to November 2024 data, India had issued a total of 8,066 smart city projects under the Smart Cities Mission (SCM). SCM was launched in June 2015 and is expected to extend till March 2025.

The growth in digital businesses and digital payment drives the demand for data centers to facilitate smooth customer transactions. In FY 2023-24, the total number of digital payment transactions volume increased to USD 2.27 billion (INR 18,737 crore), up from USD 0.30 billion (INR 2,071 crore) in FY 2017-18, constituting a growth rate of 44%. The introduction of UPI has further facilitated digital payment growth, aiding the demand for data centers. In 2024, the value of UPI-based payments reached over USD 2.4 trillion (INR 200 trillion).

The growth in the telecom industry supports the India data center market. Telecommunication data center automates traffic flow between services in a virtual network, optimising the use of network resources and improving application performance by selecting the optimal routing path.

In 2024, India was the world's second-largest telecommunications market, with a subscriber base of 1.20 billion.

Key Trends and Developments

India's growth in e-commerce, 5G adoption, IoT integration, and favourable government policies drive India data center market growth.

November 2024

Equinix, Inc., a leading global digital infrastructure company, signed its first power purchase agreement (PPA) in India with CleanMax. The partnership aims to develop a 33 MW captive power plant in Maharashtra to supply renewable energy for Equinix's growing data center operations in Mumbai. The project, combining 26.4 MWp of solar capacity and 6.6 MW of wind capacity, is expected to begin phased operations in 2025.

October 2024

The Maharashtra cabinet approved the setting up of a green integrated data center park, which is expected to attract an investment of USD 20 billion. This approval aims to attract multinational and global companies operating in the data center sector to Maharashtra.

June 2024

Airtel's data center arm, Nxtra, joined the RE100 initiative, a flagship global initiative led by Climate Group in partnership with Carbon Disclosure Project, and has committed to sourcing 100% renewable electricity, aiming to achieve its 2031 net-zero goals. Nxtra operates one of the largest networks of data centers in India with 12 large and 120 edge data centers.

May 2024

Indian data center operator CtrlS Datacenters converted its Noida data center - DC1 - to partly offtake from a solar farm. Distributed solar energy company SunSource Energy partnered with CtrlS to provide solar energy from its solar power plant, located in Gursarai, Jhansi district in Uttar Pradesh. The partnership will allow the 8MW facility to fulfil 60% of its yearly energy requirements through renewable sources.

Data center providers can enhance their market position by offering specialised services such as disaster recovery and cybersecurity

As businesses become more reliant on technology, they require more specialised services like cybersecurity, disaster management, and compliance management. By providing these services, market players can differentiate themselves and provide more value to customers. In 2023, India experienced over 79 million cyberattacks, a 15% increase compared to 2022.

Increased adoption of cloud services in India data center market

Cloud computing enables data center operators to adjust resources quickly and efficiently, eliminating the high costs and downtime of physical infrastructure changes. In 2023, Indian public cloud services generated a revenue of USD 8.3 billion, and by 2028, it is expected to attain a value of USD 24.2 billion.

The growing digitalisation and 5G technology expansion support the demand for data centers

Data centers are crucial to process the massive increase in data traffic from connected devices. By 2030, 5G telecom networks are expected to represent nearly 2% of India's GDP, contributing about USD 180 billion in revenue. In 2023, around 69% of organisations in India were identified as "Digital Businesses" with a clear digital strategy and technology integration.

Significant shift towards a cashless economy

India is witnessing a rise in digital transactions, significantly becoming a cashless economy. India's digital payment revolution is

being spearheaded by UPI, which achieved a record 16.73 billion transactions in December 2024. Furthermore, as per 2023 records, India accounts for around 49% of global real-time payment transactions, representing a strong digital payment sector, further necessitating strong data center infrastructure and impacting the demand of India data center market.

India Data Center Market Trends

India's robust IT sector has led to the establishment of local operations by several global IT corporations, ranging from major banks to technology firms, seeking to capitalise on lower labour and operational costs. According to January 2025 data, India has the presence of 65,803 software companies, representing an increase of 3.36% from 2023.

By 2030, India's consumer digital economy is expected to become a USD 1 trillion market up from USD 537.5 billion in 2020, driven by the strong adoption of online services such as e-commerce and edtech in the country. UPI has revolutionised digital payments with UPI transactions growing from 0.92 billion in FY 2017-18 to 131.16 billion in FY 2023-24, accelerating the India data center market.

India Data Center Market Opportunities

The increasing demand for energy and resources from various sectors, including data centers, is raising growing concerns about the environmental impact of these facilities. Moreover, the increasing energy costs and the need for more sustainable business practices are resulting in an increased focus on developing sustainable and environmentally friendly data centers, also known as green data centers. The trend is further pushed by the presence of government initiatives such as the ?Green Base Data Center? scheme, launched by the Ministry of Electronics and Information Technology (MeitY), further supporting the establishment of green data centers.

India is witnessing an adoption of edge computing which improves performance and reduces latency. Edge computing is considered key for Indian market, due to the presence of several remote areas with poor connectivity. Companies in India data center market are actively establishing edge computing infrastructure in rural areas enabling businesses to provide better services to their customers, even in areas with limited connectivity. As per 2024 report, Akamai Technologies, a global cloud computing company is focusing on establishing cloud computing facilities in Indian cities such as Delhi, Bengaluru and Hyderabad.

India Data Center Market Restraints

Despite the rapid growth of data centers in India, the industry faces several challenges, with one of the biggest being an inadequate power supply. In India, the power supply is often unreliable, and frequent outages can pose a major issue for data centers that rely on continuous power to function.

Several factors contribute to labour shortages in the India data center market, including the need for specialised skills, the rapid pace of technological advancements, and the growing complexity of data center operations. This shortage of qualified professionals can hinder the industry's ability to meet the rising demands of enterprises, potentially leading to higher operational costs, decreased efficiency, and increased security vulnerabilities.

India Data Center Industry Segmentation

?India Data Center Market Report and Forecast 2025-2034? offers a detailed analysis of the market based on the following segments:

On the basis of components, the market can be divided into the following:

? Services
? Solution

On the basis of Infrastructure, the market can be divided into the following:

? IT Infrastructure
??? Network
??? Storage
??? Server

? Electrical Infrastructure
??? UPS Systems
??? Generators
??? Transfer Switches and Switchgears
??? PDUs
??? Others

? Mechanical Infrastructure
??? Cooling Systems
??? Rack Cabinets
??? Others

? General Construction

??? Building Development
??? Installation and Commissioning Services
??? Building Design
??? Physical Security
??? Data Center Infrastructure Management
??? Others

On the basis of industry, the market can be divided into the following:

? Banking, Financial Services, and Insurance
? Healthcare
? Government and Defence
? Manufacturing
? IT and Telecom
? Retail
? Energy
? Others

Based on region, the market can be segregated into:

? North India
? South India

? Central India
? East India
? West India

India Data Center Market Share

Market Analysis by Component

The increasing demand for data centers in India is driven by the extensive data storage and processing needs of hyperscale cloud providers, over-the-top (OTT) platforms, and artificial intelligence (AI) companies. During 2019-2024, India witnessed an increase of 54% in active companies, reaching 1.78 million by October 2024.

Public cloud spending in India is growing at a rate of 18% annually, driven by the increasing adoption of software-as-a-service (SaaS) models in response to the ongoing digital transformation, further supporting the India data center market growth.

Market Analysis by Infrastructure

As per India data center market analysis, by 2026, the Indian data centre sector is estimated to add 604MW of capacity, which will require 7.3 million sq ft of space and an investment of USD 3.8 billion. The increasing adoption of artificial intelligence and the rollout of 5G across the country is pushing the need for increased data centre capacities.

Further, the rising internet connectivity across the country is pushing the requirement for data centre networks and efficient servers. India is witnessing average download speeds increasing from 4.18 Mbps to 105.85 Mbps during 2014 to 2024, representing a rise of 2,432.29%.

As per august 2024 records, India is home to around 1,300 AI companies, with AI anticipated to drive the demand for high-density server racks, ranging from 5 to 50 kW.

There is a growing demand for electrical infrastructure driven by the data centre growth in India. ?It is estimated that during 2024-2027, the data centre power consumption to increase by 678 MW to 1,400 MW, significantly increasing the demand for generators, switchgears, PDUs and UPS systems. Switchgears are key factors in data center's power distribution as it is used to control and distribute power and to disconnect faults, while PDU is responsible for controlling electrical power.

Cooling systems and rack cabinets are crucial for preventing overheating in data centers. They maintain optimal temperatures, ensure proper airflow, and support equipment reliability, efficiency, and longevity, even in densely packed and high-performance IT environments.

This trend in India data center market is further supplemented by the growing investment in the sector. For instance, in October 2024, RackBank announced an 80MW AI-optimised data center in Indore, Madhya Pradesh that will feature Varuna liquid immersion cooling immersion technology, rear door heat exchangers, and rack densities of 50-150kW, targeting PUE of 1.1 to 1.3.

Market Analysis by Industry

Data centers enable the BFSI sector to process high volumes of transactions within milliseconds, ensuring seamless operations in a time-critical industry.

UPI has transformed digital payments in the country, with transaction volumes 131,160 million in FY 2023-24, reflecting a

remarkable CAGR of 129% from FY 2017-18, supporting the India data center market expansion.

Data centers manage critical data from sensors, machine logs, and supply chains, supporting India's manufacturing sector, set to reach USD 1 trillion by 2025-26.

In January 2024, Digital Realty launched a data center, including a 100 MW facility in Chennai's manufacturing hub, highlighting rising demand for digital transformation.

In government and defence, data centers manage sensitive data for citizen services, intelligence, and military operations. India's Digital Public Infrastructure (DPI) includes Aadhaar (1,383.4 million IDs), UPI (241,000 million transactions), DigiLocker (370.46 million users, 7,760 million documents), and DIKSHA (5,563.7 million sessions, 179.5 million enrolments, 143.7 million completions).

As per the India data center market analysis, in 2024, India's telecom sector is expanding with over 50% of the country's population considered to be active internet user, thus pushing the major telecom players to significantly invest in their data center capabilities.

Leveraging the growing trend, Airtel plans to launch multiple new hyperscale and enterprise data centers across key metro cities in the next 3-5 years.

India Data Center Market Regional Insights

The installed IT capacity in National Capital Region (NCR) is expected to grow from 61 MW in FY 2023 to 260 MW in FY 2026. Edge data centers are driving the capacity editions.

In December 2024, VueNow headquartered in Mumbai, launched two new Edge Data Centers in Uttar Pradesh's Malihabad and Ambedkar Nagar. The company, supported by the Uttar Pradesh Government, is working towards setting up 750 Edge Data centers in the state by 2028, making it the world's largest and densest Edge Data center network.

South India data center market is expected to play a crucial role in the global data center landscape with capacity projected to grow 65% by 2030. In 2024, the combined installed data center capacity in Chennai, Bengaluru, and Hyderabad was approximately 200 MW with 190 MW under construction and an additional 170 MW planned.

In March 2023, the Web Werks - Iron Mountain Data Centers (IMDC) Joint Venture launched the first phase of a new facility in the Karnataka region of the country in Bangalore. The BLR-1 is a Tier III-designed data center that can support up to 4MW of IT load.

Under its 2023 IT policy, Madhya Pradesh offered a land subsidy of up to 75% for the establishment of data centers, along with capital expenditure support of 25% for the first five data centers that make a minimum investment of USD 60.55 million.

In October 2024, RackBank launched India's first purpose-built AI data center, designed to support 60,000 GPUs and 80MW power. Positioned as a key hub for AI and cloud services, it offers low-latency connectivity and strengthens India's technological infrastructure.

Competitive Landscape

The India data center market players are engaging in geographical expansion to major hubs, strategic partnerships, strengthening Presence with AI-Enabled Facilities and Government Partnerships, significantly contributing to market growth.

Yotta Data Services Private Limited

Founded in 2019, Yotta designs, builds, and operates infinitely scalable data center parks, catering to the evolving needs of the digital era. Yotta currently operates two data centers: Yotta NM1 in Navi Mumbai, Maharashtra, and Yotta D1 in Greater Noida, Delhi-NCR.

AdaniConnex Private Limited

Founded in 2021, AdaniConneX, a joint venture between the Adani Group and EdgeConneX, was established to develop a 1 GW national data center platform aimed at driving the growth of Digital India. AdaniConneX operates a robust network of state-of-the-art data centers strategically located in Chennai, Hyderabad, Mumbai, Noida, Pune, and Vizag.

Pi DATACENTERS? Pvt. Ltd.

Founded in 2014, Pi DATACENTERS? operates with a cumulative built-up area of 500,000 sq. ft. and a power capacity of 60 MW, supported by a dedicated in-house substation. It stands as India's first Greenfield and the world's fourth-largest Uptime Institute TIER IV Certified Data Center.

CTRLS Datacenters Ltd.

Founded in 2007, The company operates its datacenters with a remarkable 250 MW operational capacity, spanning 15 datacenters across 8 major markets and continually growing. CtrlS owns and operates multiple subsidiaries, including Cloud4C, Pioneer Labs, SCHNABEL, Cloud4C Automation, and Cloud4C Digital.

Other key players in the India data center market are Arshiya Limited., NTT Global Data Centers, Sify Technologies Limited, and Reliance Communications Ltd, among others.

More Insights On

Italy Data Center Market

United States Data Center Market

Germany Data Center Market

United Kingdom Data Center Market

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