SCOTTS INTERNATIONAL

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

Market Report | 2025-10-09 | 120 pages | EMR Inc.

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Report description:

The India esports market attained a value of USD 208.73 Million in 2024 and is projected to expand at a CAGR of around 18.80% through 2034 . Esports' relevance is increasing due to its integration into brand engagement strategies and live streaming ecosystems. Brands like PepsiCo and Intel have recently collaborated with gaming tournaments, leveraging esports to tap into Gen Z consumers, propelling the market to achieve USD 1168.82 Million by 2034 .

Rising monetization opportunities via various streaming platforms as well as cross-industry sponsorships are key factors driving the India esports market. According to FICCI-EY (2024), India hosted over 275 large-scale esports tournaments in 2024, up from 190 in 2023. Investment in local gaming IPs along with the increased visibility of esports on platforms like YouTube Gaming and Rooter further support this growth. Regional leagues and college-level esports initiatives, like AIU's 2025 inter-university esports championship, are also broadening the player and viewership base, thereby boosting the India esports market expansion.

India's esports industry, which is driven by innovation, is slowly drifting towards edtech and skill-based learning. Gamerji and Stanza Living are offering competitive game training on their platforms, building a hybrid entertainment-education segment. Organic player development is accelerating in India's Tier-II and Tier-III cities, positioning the esports sector at the crossroads of youth culture, technological advancement, and the expanding digital economy.

Another notable innovation in the India esports market is the rise of blockchain-based esports platforms. Startups like STAN and FanAnywhere are integrating NFTs and token-based rewards into fan engagement. These platforms allow users to collect digital memorabilia, earn tokens through participation, and trade in-game assets securely. This Web3 integration is transforming fan interaction, offering monetization avenues for players and creators while building loyal digital communities. It also enhances transparency and ownership in esports-related content and merchandise.

India Esports Market Report Summary

Description

Value

Base Year

USD Million

2024

Historical Period

USD Million

2018-2024

Forecast Period

USD Million

2025-2034

Market Size 2024

USD Million

208.73

Market Size 2034

USD Million

1168.82

CAGR 2018-2024

Percentage

XX%

CAGR 2025-2034

Percentage

18.80%

CAGR 2025-2034 - Market by Region

South India

20.7%

CAGR 2025-2034 - Market by Region

West India

19.9%

CAGR 2025-2034 - Market by Streaming Type

Live

20.6%

CAGR 2025-2034 - Market by Platform

Mobile and Tablets

22.1%

2024 Market Share by Region

South India

31.2%

Key Trends and Recent Developments

May 2025

Rajasthan launched the State Esports Championship (RSEC) 2025 with AA Gaming, featuring games like BGMI and CS2. The event includes qualifiers and finals, plus workshops on gaming skills, career paths, mental health, and professional conduct.

May 2025

CyberPowerPC and Orangutan have partnered to launch ApeCity, India's first esports arena led by an esports organization, located in Navi Mumbai. Equipped with high-performance gaming PCs, PlayStations, and a Sim Racing setup, ApeCity offers a professional-grade environment for gamers, streamers, and esports athletes.

April 2025

Reliance Industries is re-entering the esports sector, aiming to capitalize on India's burgeoning gaming market. After previous setbacks, the company is making a renewed effort to establish a strong presence in the industry. This strategic move reflects the growing momentum of India's esports ecosystem and the increasing attention from both global and domestic players.

October 2024

India is set to host its first-ever international esports tournament, the International Esports Masters. Organized by the Skillhub Online Games Federation (SOGF) in collaboration with the International Esports Federation (IESF), the event aims to attract participants from 150 countries. The host city is yet to be finalized and will depend on sponsorship commitments from state governments.

Government Recognition and Policy Support

In December 2023, the Ministry of Youth Affairs and Sports officially recognised esports as one of the multi-sport events. This decision allowed esports players to get training and infrastructure equal to Olympic athletes under the aegis of the Sports Authority of India (SAI). It also laid the groundwork for Khelo India funding. These developments support organized grassroots development and investments and thereby fuel the growth curve of the India esports market in 2025.

Mobile-First Gaming Boom

India's mobile gaming ecosystem, fuelled by affordable smartphones and data tariffs, accounts for over 90% of esports participation. Titles like BGMI and Free Fire dominate mobile esports. The 2025 return of Free Fire to the Indian market and Krafton's expanded BGMI tournament circuit with a USD 2 million prize pool demonstrate the growing dominance of mobile-based esports. This mobile-first growth democratizes access and drives expansion into non-metro markets.

Corporate Sponsorship and Brand Integration

Non-endemic brand sponsorships have been gaining increased significance in the last few years. Hyundai and Intel sponsored the Skyesports Masters League in early 2025. Such sponsorships improve the quality of events and enhance prize amounts, increasing the competitiveness and commercial appeal of tournaments. Esports tournaments now mirror mainstream sports in production value, further boosting fan engagement and recurring revenue streams. Such factors are primarily shaping new trends in the India esports market.

Esports-cricket fusion boosts audience engagement

Fusion between traditional sports and esports is emerging as a unique factor driving growth in the India esports market. In February 2025, events like the WAVES Summit highlighted digital cricket titles such as World Cricket Championship (WCC), with participation from major IPL franchises like Mumbai Indians and KKR launching esports verticals. This convergence is attracting sports fans to gaming platforms, enhancing sponsorship value and expanding audience reach. Such hybrid strategies are boosting esports' legitimacy and engagement in both urban and semi-urban regions.

Emergence of Regional Leagues and Tier-II Talent

The convergence of esports and education is on the rise. Platforms such as Gamerji provide competitive gaming training, while universities like Lovely Professional University (LPU) started offering esports-themed elective courses in 2024. The skill development perspective makes esports a career opportunity, bringing in institutional investment and formalized training facilities that ensure long-term ecosystem viability, boosting the India esports market opportunities.

India Esports Industry Segmentation

The EMR's report titled "India Esports Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup by Revenue Streaming

- Sponsorship
- Advertising
- Merchandise and Tickets
- Game Publisher Fees
- Others

Key Insight: Sponsorship is the leading revenue channel in the Indian esports economy, fuelled by rising brand interest in tapping into the youth through esports. Major corporations and international brands invest money to affiliate with top teams, events, and personalities. Sponsorship funds support content creation, prize pots, and event production, driving overall industry growth. Sponsorships also allow for long-term deals, building a stable financial foundation for esports ecosystems, positioning it as the biggest and most impactful revenue source, thus boosting the India esports market expansion.

Market Breakup by Streaming Type

- Live
- On Demand

Key Insight: Live streaming is the dominant way of streaming esports in the Indian industry, driven by instant connection and interactive experiences. YouTube, Twitch, and Facebook Gaming are some of the platforms that host tournaments with enormous viewership participation. Live events command greater ad rates and sponsorships because of their immediate and community involvement. The excitement of watching competitive gameplay unfold in real-time creates a vibrant esports culture, making live streaming the primary content consumption mode, significantly contributing to revenue and audience growth, and thus boosting the India esports market development.

Market Breakup by Platform

- PC-Based Esports
- Consoles-Based
- Mobile and Tablets

Key Insight: Mobile and tablet gaming lead the platform category in the esports industry because of widespread smartphone penetration and affordable internet access. Titles like Free Fire and BGMI enjoy huge active player bases and viewing communities, which push esports tournaments and leagues that are specifically mobile-centric. Ease of access through mobile platforms facilitates participation from various segments of society, particularly in tier 2 and tier 3 cities, widening the India esports market scope. This ease of accessibility increases sponsorships, viewership, and overall esports revenue, making mobile esports the industry's fastest growing and most powerful platform.

Market Breakup by Region

- North India
- East India

- South India
- West India

Key Insight: West India dominates the esports market because Mumbai is the industry's hub of production and events, aided by Pune's IT and student community. The region features massive tournaments like ESL India Masters and BGMI qualifiers, which attract top teams, sponsors, and viewers. Presence of production houses, coworking spaces, and event agencies makes West India the go-to destination for large events, pushing increased revenue generation. This dominance of the region arises from robust infrastructure, economic strength, and an active esports community.

India Esports Market Share

Sponsorships dominate, with brands targeting youth through regional esports campaigns and partnerships.

Sponsorship is gaining momentum as brands look for genuine youth connections. A report by Ernst & Young projected that tournament sponsorship and syndication revenue would reach ?350 crore (approximately USD 47 million) by 2025, indicating a substantial contribution from sponsors to tournament funding. Brands such as Red Bull, Flipkart, and Mountain Dew aligned esports events for co-branded marketing, while Skyesports entered into agreements with various multi-brand title sponsors for its national league. Sponsorship agreements now go beyond event signage into branded content, gaming hardware, and influencer partnerships. With the transition to regional formats, brands are able to tailor campaigns to regional audiences, additionally boosting sponsorship value within the esports economy.

Merchandise sales and event ticketing are new channels accelerating the India esports market revenue, expanding strongly with rising live event attendance. Fans are willing to buy team jerseys, branded merchandise, and collectibles. The sector gains from the increasing fan engagement and the infrastructure being developed for esports stadiums and arenas, propelling growth as fans desire tangible affinities with their favourite teams and events.

Live streaming dominates esports with real-time engagement, high revenue, and fan loyalty.

Live streaming dominates esports viewership in India due to its real-time interaction and high engagement levels. Platforms like YouTube and Twitch host popular tournaments with chat and donation features that deepen viewer involvement. Live broadcasts attract premium sponsorship and advertising revenues, and their immediacy drives viral moments and communal excitement, creating a dynamic atmosphere that strengthens fan loyalty and attracts new audiences consistently, thus bolstering the India esports market revenue

On demand streaming is expanding quickly as audiences search for flexible, curated esports content beyond live events. Highlights, tutorials, and behind-the-scenes videos on YouTube and Instagram provide bite-sized content appealing to casual fans and esports beginners. This kind of accommodation accommodates busy lifestyles, with the ability for fans to consume esports on their own timeline. On demand enables content creators to diversify revenue through ads, sponsorships, and subscriptions, broadening reach beyond periods of peak live viewership.

Supermarkets dominate via cold chain, urban penetration, and branded egg visibility.

Mobile esports dominate the overall India esports market based on affordable smartphones and increased 4G/5G penetration. Games such as BGMI and Free Fire have millions of players across the country, particularly in smaller towns and cities. Mobile esports dominate India, driven by affordable smartphones and deep 4G/5G reach. BGMI surpassed 100 million downloads in 2023 as per Krafton, while India's mobile gaming base crossed 500 million in 2024 as per IAMAI-RedSeer, fueling massive grassroots engagement and brand interest. Accessibility drives grassroots competitive communities and online competitions, backed by game developers and local leagues. Mobile esports also draw brands looking to access this vast pool of players, making it the backbone for India's growth in terms of participation as well as revenue.

Console-based esports is the most rapidly growing segment with a smaller current market share, driven by the growing availability of low-cost consoles and improving internet infrastructure. Brands such as FIFA and Call of Duty are gaining popularity among Indian gamers. Console-based competitive gaming is appealing among urban youth with access to specialized gaming setups, esports cafes, and live competitions. International tournaments broadcast locally, and new console-based leagues are fuelling growth, making it a high-potential area to grow in the future.

India Esports Market Regional Analysis

West India leads Indian esports with Mumbai's events and Pune's student participation.

West India dominates the Indian esports industry due to Mumbai and Pune's economic and infrastructural prowess. Mumbai is the hub for esports production, content creation, and live event hosting. Activities such as the ESL India Masters and BGMI City Qualifiers regularly attract top teams, sponsors, and huge digital audiences. West India provides ease of availability of production houses, coworking spaces, and event agencies, making it a perfect location for large-scale events. Pune, which has a robust student base and IT support, is also seeing increasing participation in college-level esports leagues, thereby boosting the India esports market revenue.

In South India, the growth is the highest, led by a number of regional leagues and grass-root talent. Chennai-based Skyesports continues to ramp up regional tournaments in Tamil and Telugu. Hyderabad is becoming a content and tournament hub, hosting stadium events that are as big as traditional sports in terms of viewer interest. East and North India are on-the-rise markets, with qualifiers for national tournaments being held in cities such as Guwahati and Lucknow during 2024?2025. Digital initiatives funded by the government in these markets are enhancing internet connectivity and facilitating wider engagement. North India's growing community of YouTube gamers and East India's university leagues are likely to be pivotal to growing the next generation of esports consumption and talent discovery.

Competitive Landscape

India esports market is extremely competitive with tournament organizers, streaming platforms, and gaming franchises competing for viewership, sponsorships, and IP generation. NODWIN Gaming, Jet Skyesports, and Revenant Esports are some of the top India esports companies that are expanding operations with diversified approaches. Companies have a focus on proprietary IP generation, cross-platform content, and brand partnerships to create fan communities and revenues. With the state now officially recognizing esports in 2023, professional leagues are being funded by corporations and youth sport incentives, further cementing competition structures._x000D_
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Strategic alliances among event organizers and international publishers such as Riot Games, Krafton, and Garena have brought international-standard tournaments to India. Content creators and streamers are now influencer brands that lead both viewership and merchandise sales. Regional language content and team franchises are also being invested in by companies to increase local reach. Grassroots scouting, regional leagues, and intercollegiate tournaments are funnelling into the professional league, making talent nurturing a differentiating competitive advantage for the players in 2025.

Jet Skyesports Gaming Private Limited

Jet Skyesports Gaming Private Limited, established in 2018 in Chennai, is a prominent esports organizer known for pan-India events like Skyesports Masters and Grand Slam, fostering regional esports talent and infrastructure through extensive grassroots tournament networks and streaming deals.

NODWIN Gaming Pvt. Ltd.

NODWIN Gaming Pvt. Ltd., founded in 2015 in Gurugram, leads India's esports ecosystem through flagship IPs like BGMS, strategic alliances with global publishers, and investments in event production, content creation, and broadcast infrastructure targeting South Asia's competitive gaming market.

Revenant Esports Private Limited

Revenant Esports Private Limited, launched in 2021 in Mumbai, fields top-tier teams in BGMI and Valorant, emphasizing player training, brand sponsorships, and fan loyalty programs, while leveraging social media and esports influencers to drive digital engagement.

G Esports Holding GmbH

G Esports Holding GmbH, established in 2019 in Berlin, entered India via local partnerships to scale its global IP portfolio across Indian audiences, collaborating with broadcasters and platforms to deliver high-quality tournaments and widen esports monetisation in emerging markets.

Other key players in the India esports market include NVIDIA Corporation, MODERN TIMES GROUP, among others.

Key Highlights of the India Esports Market Report:

- Market dynamics mapped with authentic data and growth projections extending till 2034.
- Coverage of key tech advances like VR-enabled gameplay, AI-based match analytics, and mobile-first platforms.
- Comprehensive profiling of domestic and global esports organisers, publishers, and tournament platforms.
- State-level breakdown reflecting digital infrastructure disparities and policy gaps across gaming hubs.
- Industry-aligned insights exploring rising monetisation via influencer streaming, microtransactions, and brand tie-ups.
- Focus on investor traction and capital inflow trends from venture firms and entertainment conglomerates.

Why Rely on Expert Market Research?

- Dedicated analysts with domain experience in India's digital entertainment and gaming ecosystems.
- Multi-source intelligence pulled from tournament data, tech innovators, streamers, and platform hosts.
- Adaptive research models that reflect regional tech adoption and Gen Z consumption shifts.
- Proprietary data blended with on-ground trends to guide entry, scale-up, or diversification strategies.
- End-to-end decision support designed for developers, advertisers, platform enablers, and investors.

Call to Action

Explore the latest trends shaping the India esports market 2025-2034 with our in-depth report. Gain strategic insights, future forecasts, and key market developments that can help you stay competitive. Download a free sample report or contact our team for customised consultation on India esports market trends 2025 .

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