India Data Center Market - Investment Analysis & Growth Opportunities 2026-2031

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Report description:

The India data center market is expected to grow at a CAGR of 13.59% from 2025 to 2031.

INDIA DATA CENTER MARKET - KEY HIGHLIGHTS

-Mumbai, Navi Mumbai, Hyderabad, Chennai, Pune, are the preferred locations in India, with major investments from colocation service providers such as ST Telemedia Global Data Centres, NTT DATA, CtrlS, Equinix, Sify Technologies, Nxtra by Airtel, among others.
-Data center operators in India are showing interest in adopting renewable and they signed a renewable energy PPA for their data center facility. For instance, in November 2025, CtrlS Datacenters announced that it had signed an MoU with NTPC Green Energy Limited (NGEL), a subsidiary of NTPC Limited, to develop a renewable energy project with a capacity of around 2GW.
-In India, the demand for data centers is steadily increasing. This growth is likely to raise the demand for both power and water, the two major components of data center operations. We believe that in the coming years, power challenges are likely to be reduced due to government initiatives and data center operators adopting renewable energy and in-house grid systems. However, we have noticed, there is likely to be one more challenge in the future, i.e, water challenges in the Indian data center market. Most of the data centers are expected to adopt a liquid cooling system, which uses less water than a traditional cooling system.
-In August 2025, CtrlS Datacenters announced that it had launched its first phase of the Kolkata data center campus, which uses a liquid cooling system in its facility to manage its heat.

WHY SHOULD YOU BUY THIS RESEARCH?

-Market size available in the investment, area, power capacity, and the India colocation market revenue.
-An assessment of the data center investment in India by colocation, hyperscale, and enterprise operators.
-Data center investments in the area (square feet) and power capacity (MW) across cities in the country.
-A detailed study of the existing India data center market landscape, an in-depth industry analysis, and insightful predictions about the India data center market size during the forecast period.

-Snapshot of existing and upcoming third-party data center facilities in India
oFacilities Covered (Existing): 132
oFacilities Identified (Upcoming): 81
oCoverage: 25+ Locations
oExisting vs. Upcoming (Data Center Area)
oExisting vs. Upcoming (IT Load Capacity)
-Data center colocation market in India
oColocation Market Revenue & Forecast (2022-2031)
oRetail & Wholesale Colocation Revenue (2022-2031)
oRetail & Wholesale Colocation Pricing
-India data center landscape market investments are classified into IT, power, cooling, and general construction services, with sizing and forecast.
-A comprehensive analysis of the latest trends, growth rate, potential opportunities, growth restraints, and prospects for the industry.
-Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the industry.
-A transparent research methodology and the analysis of the demand and supply aspects of the market.

INDIA DATA CENTER MARKET VENDOR LANDSCAPE

The India data center market has the presence of several major data center operators, including AdaniConneX, Colt Data Centre Services, CtrlS, Equinix, Digital Connexion (BAM Digital Reality), NTT DATA, Nxtra by Airtel, ST Telemedia Global Data Centres (STT GDC), and others. Some data center operators have expanded their facilities across the country, with new developments expected to become operational during the forecast period.
The country has the presence of some of the major cloud operators, such as AWS, Google, IBM Cloud, Microsoft, Oracle, OVH, and Tencent Cloud, with dedicated cloud region(s). Their cloud regions are spread across various cities such as Chennai, Delhi NCR, Hyderabad, and Pune.
The India data center market has the presence of several major IT infrastructure vendor, including Arista Networks, Broadcom, Cisco Systems, Dell Technologies, IBM, Lenovo, NVIDIA, among others.
In India, some data center operators have adopted NVIDIA IT products to accelerate computing, networking, and software. For instance, Sify Technologies adopted NVIDIA DGX A100 systems, while RackBank deployed NVIDIA H100, A100, and GB200 GPUs for their data center.
The India data center market has the presence of several global and local data center construction contractors & sub-contractors, including AECOM, AIPL, DSCO Group, AHLUWALIA CONTRACTS (INDIA), KEC International KBE (Krishna Buildestates), Larsen & Toubro, Shubham EPC, Leighton Asia, Sterling and Wilson and others. For instance, in January 2025, Shubham EPC announced that it had started construction on two of its data centre projects, NMDC02 and NMDC03, for STT Global Data Centres in Navi Mumbai.
In India, data centers use both traditional cooling systems as well as liquid cooling systems. The liquid cooling has higher thermal transfer properties than the air-cooling system. It uses water or other fluids to cool high-density racks. For instance, Sify Technologies utilises liquid cooling in its data center facility at the Mumbai-Rabale campus, and it has also planned to implement a liquid cooling system in other facilities in India, which will support approximately 130 kW/rack. In addition, it has become the first data center in India to achieve NVIDIA DGX-Ready Data Centre certification for liquid cooling.
In November 2025, Johnson Controls announced the launch of the Silent-Aire Coolant Distribution platform, which is expected to provide scalable liquid-cooling capacities for data centres in India.

EXISTING VS. UPCOMING DATA CENTERS

-Existing Facilities in the region (Area and Power Capacity)

o Maharashtra
o Uttar Pradesh
o Tamil Nadu
o Telangana
o Other States
- List of Upcoming Facilities in the region (Area and Power Capacity)
o Maharashtra
o Uttar Pradesh
o Tamil Nadu
o Telangana
o Other States

IT Infrastructure Providers

- Arista Networks
- Atos
- Broadcom
- Cisco Systems
- Dell Technologies
- Fujitsu
- Hewlett Packard Enterprise
- Hitachi Vantara
- Huawei Technologies
- IBM
- Lenovo
- NEC
- NetApp
- NVIDIA
- Oracle

Data Center Construction Contractors & Sub-Contractors

- AECOM
- AIPL
- AHLUWALIA CONTRACTS (INDIA)
- ARWADE INFRASTRUCTURE
- DEC Infra
- DSCO Group
- Edifice Consultants
- Emerge Engineering
- KEC International
- KBE (Krishna Buildestates)
- Larsen & Toubro
- Leighton Asia
- Listenlights
- Nikom InfraSolutions
- Prasa

-Shubham EPC
-Sterling and Wilson
-Kent
-Tata Projects
-Techno Electric & Engineering
-Turner & Townsend
-Vastunidhi Architects

Support Infrastructure Providers

-3M
-ABB
-Alfa Laval
-Bloom Energy
-BlueBox by Swegon
-Caterpillar
-Climaveneta
-Cummins
-Delta Electronics
-Eaton
-Fuji Electric
-HITEC Power Protection
-Johnson Controls
-Kirloskar Oil Engines (KOEL)
-Legrand
-Panduit
-Rehlko
-Riello Elettronica
-Rittal
-Rolls-Royce
-Schneider Electric
-Siemens
-STULZ
-Vertiv

DATA CENTER INVESTORS

-AdaniConneX
-Amazon Web Services
-Bridge Data Centres
-BSNL
-Colt Data Centre Services
-CtrlS Datacenters
-Cyfuture
-Digital Connexion
-Equinix
-ESDS Software Solution Limited

-Google
-Iron Mountain
-Microsoft
-NTT DATA
-Nxtra by Airtel
-Pi DATACENTERS
-Princeton Digital Group
-RackBank
-Reliance Jio
-Sify Technologies
-ST Telemedia Global Data Centres
-VueNow
-Yotta Infrastructure

NEW ENTRANTS:

-AirTrunk
-CapitaLand
-Digital Edge
-Everstone Group
-Lumina CloudInfra
-Mapletree
-NES DATA
-Techno Electric & Engineering Company (TEECL)

KEY QUESTIONS ANSWERED:

1.How big is the India data center market?
2.How much MW of power capacity will be added across India during 2026-2031?
3.What factors are driving the India data center market?
4.Which all geographies are included in the India data center market report?

Table of Contents:

1.CHAPTER 1: EXISTING & UPCOMING THIRD-PARTY DATA CENTERS IN INDIA
-Data Center Snapshot
-Data Center Snapshot By States
-Existing & Upcoming Data Center Supply in by States
-List of Upcoming Data Center Projects in India
2.CHAPTER 2: INVESTMENT OPPORTUNITIES IN INDIA
-Microeconomic & Macroeconomic Factors for India Market
-Impact of AI on Data Center Industry in India
-India Data Center Policy 2020
-Setting Up Data Center in India
-Investment Opportunities in India
-Digital Data in India
-Market by Area
-Market by Power Capacity

3. CHAPTER 3: DATA CENTER MARKET BY FACILITY TYPE
- Investment by Facility Type
- Area by Facility Type
- Power Capacity by Facility Type
4. CHAPTER 4: DATA CENTER COLOCATION MARKET IN INDIA
- Colocation Services Market in India
- Retail vs Wholesale Data Center Colocation
- Demand Across Several Industries in India
- Industry Demand Share
- Colocation Pricing (Quarter Rack, Half Rack, Full Rack) & Add-ons
5. CHAPTER 5: MARKET DYNAMICS
- Market Enablers
- Market Trends
- Market Restraints

6. CHAPTER 6: MARKET SEGMENTATION
- IT Infrastructure: Market Size & Forecast
- Electrical Infrastructure: Market Size & Forecast
- Mechanical Infrastructure: Market Size & Forecast
- General Construction Services: Market Size & Forecast
- Breakup of Construction Cost
7. CHAPTER 7: TIER STANDARDS INVESTMENT
- Tier I & II
- Tier III
- Tier IV
8. CHAPTER 8: GEOGRAPHY SEGMENTATION
- Maharashtra
- Uttar Pradesh
- Tamil Nadu
- Telangana
- Other States
9. CHAPTER 9: KEY MARKET PARTICIPANTS
- IT Infrastructure Providers
- Construction Contractors & Sub-Contractors
- Support Infrastructure Providers
- Data Center Investors
- New Entrants

10. CHAPTER 10: APPENDIX
- Market Derivation
- Site Selection Criteria
- Quantitative Summary
- List of Abbreviations

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