

savills

SPOTLIGHT

Beyond Data Centres: Rise of the Supporting Ecosystem

NOVEMBER 2026

RESEARCH

CONTENTS

01
Preface

02
Data Centre-Aligned Warehousing: A New Supply Chain Ecosystem

03
Beyond Data Centres: The Rise of Aligned Warehousing Demand

04
Sizing the Warehousing Opportunity: From MW IT to Mn Sq. Ft.

05
Emerging Data Centre-Led Manufacturing Opportunity

06
What's Next

Preface

India's industrial and logistics sector has traditionally been driven by manufacturing, 3PL, retail, FMCG & FMCD and e-commerce occupiers. However, the rapid growth of data centres is creating a new demand stream for aligned warehousing. These facilities support data centres across their lifecycle, from storing and staging critical equipment during construction to supporting maintenance, replacement and operational requirements once facilities become operational. While this segment remains a niche occupier category today compared with traditional sectors, its growth trajectory suggests significant long-term potential.

India's data centre market is entering a strong growth phase, supported by digitalisation, cloud adoption, artificial intelligence (AI) and rising data consumption. The country's data centre stock is expected to reach 7 GW IT by 2030. As the data centre ecosystem expands, equipment suppliers, infrastructure providers, manufacturers and 3PL providers are likely to require strategically located warehouses near major data centre clusters. This creates an emerging opportunity for data centre-aligned warehousing and an additional demand pool for India's industrial and logistics real estate sector.

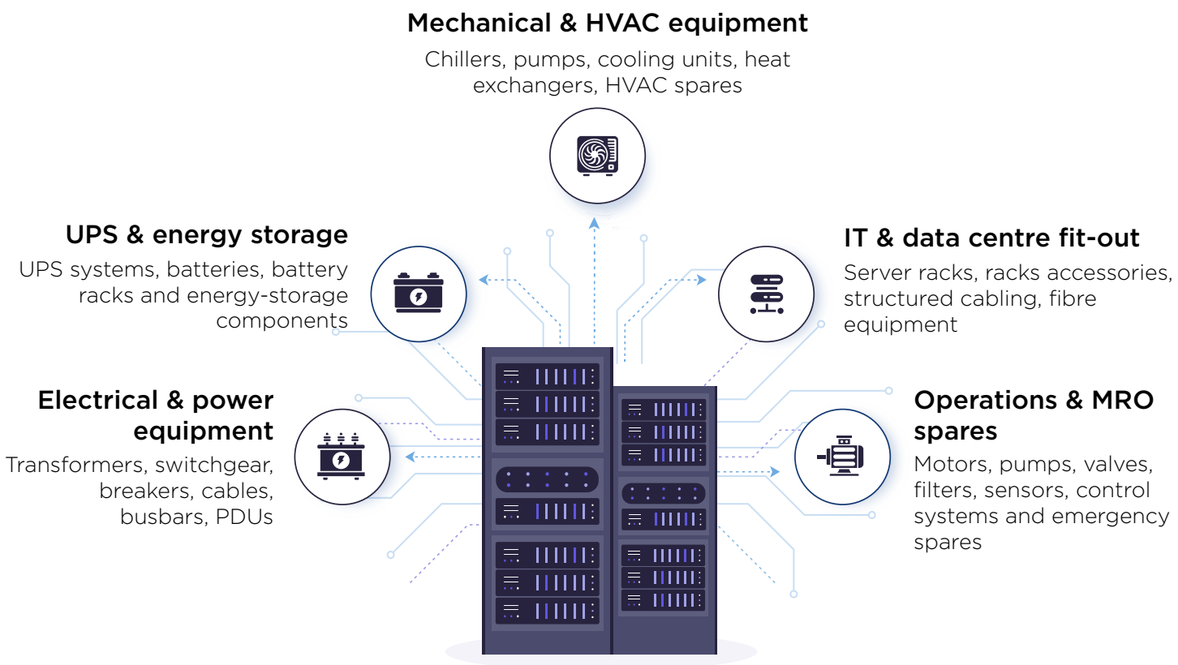
This study strives to assess the relationship between data centre growth and aligned warehousing demand and estimate the potential ripple effect of data centre expansion on warehousing demand. It further aims to provide insights into the broader logistics and industrial real estate opportunity emerging from India's rapidly expanding data centre ecosystem.



Data Centre-Aligned Warehousing: A New Supply Chain Ecosystem

Data centre-aligned warehouses are Grade-A facilities strategically located near data centre clusters. They are used by infrastructure providers, contractors, equipment suppliers, third-party maintenance (TPM) providers, and 3PLs for equipment storage, staging, spare-parts management and logistics support.

Data centres depend on a complex supply chain of IT, electrical, power and cooling equipment. The manufacturing, import, storage, distribution and replacement of these components generate warehousing requirements for inventory management, critical spares, equipment staging and reverse logistics, creating demand beyond the data centre facility itself.



Source: Savills India Research

BEYOND DATA CENTRES: RISE OF THE SUPPORTING ECOSYSTEM

While data centre-aligned warehouses support a specialised occupier ecosystem, their physical specifications and commercial leasing structures remain largely consistent with conventional Grade-A warehousing assets. Most occupiers typically seek modern facilities with good connectivity, high-quality infrastructure, robust security and efficient loading capabilities, all of which are standard features of Grade-A warehouses.

WAREHOUSE REQUIREMENTS BY DATA CENTRE ACTIVITY

Data Centre Activity	Aligned Warehousing Requirement
Site Development & Construction	Material storage yards & temporary logistics hubs
Structural Components & Prefabrication	Prefabricated component storage & cross-docking centres
Servers & IT Equipment	Secure warehouses & climate-controlled storage
Network & Telecom Infrastructure	High-value equipment storage, distribution hubs, spares management
Power Infrastructure (Transformers, Switchgear, UPS)	Electrical equipment & heavy-lift storage
Batteries & Energy Storage Systems	Hazardous-material compliant storage, specialised battery warehouses
Cooling Systems	Component storage, assembly & logistics facilities, spare parts inventory
Renewable Energy & Backup Power Systems	Equipment storage, staging & distribution centres
Operations & Maintenance	Spare-parts warehouses, service logistics centres, TPM inventory hubs
Asset Replacement & Technology Refresh	Reverse logistics & refurbishment facilities
Multi-Campus Data Centre Networks	Regional distribution & consolidation hubs
AI & High-Density Compute Infrastructure	High-security specialised storage



Source: Savills India Research

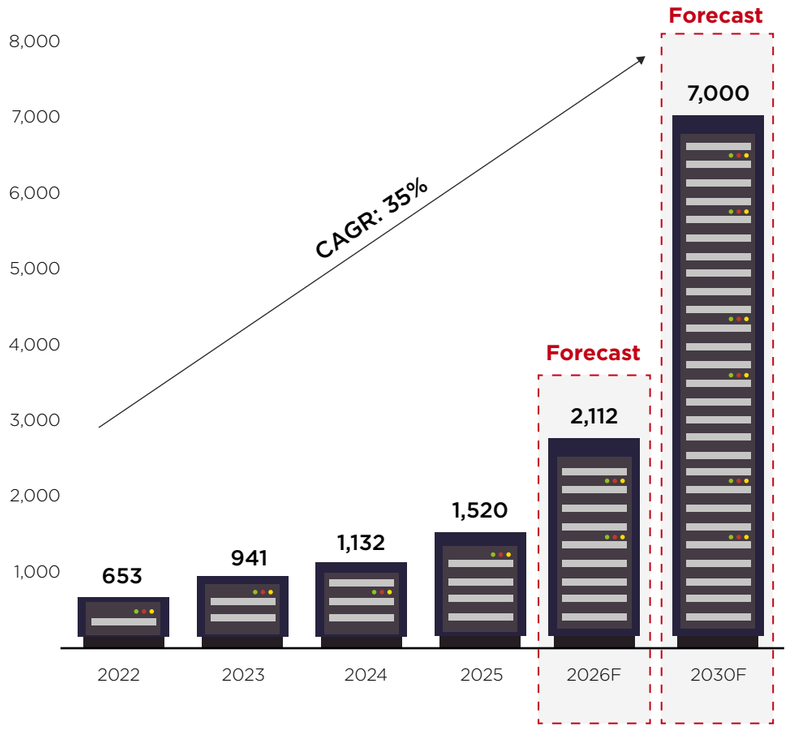


Beyond Data Centres: The Rise of Aligned Warehousing Demand

India's data centre market continues to grow at a steady pace. Increasing enterprise adoption of cloud services is driving demand from hyperscalers and neo-cloud providers, supported by the rapid growth of AI workloads, favourable policy initiatives, competitive operating costs and strategic geographic advantages.

Data centre infrastructure is emerging as a significant demand driver for manufacturing, warehousing and distribution assets. The rapid expansion of data centres is creating demand that extends far beyond the data centre itself. As data centre clusters grow across India, this ecosystem is emerging as a new source of demand for warehousing, manufacturing and logistics space.

OPERATOR-BASED OVERALL DATA CENTRE STOCK (MW IT)

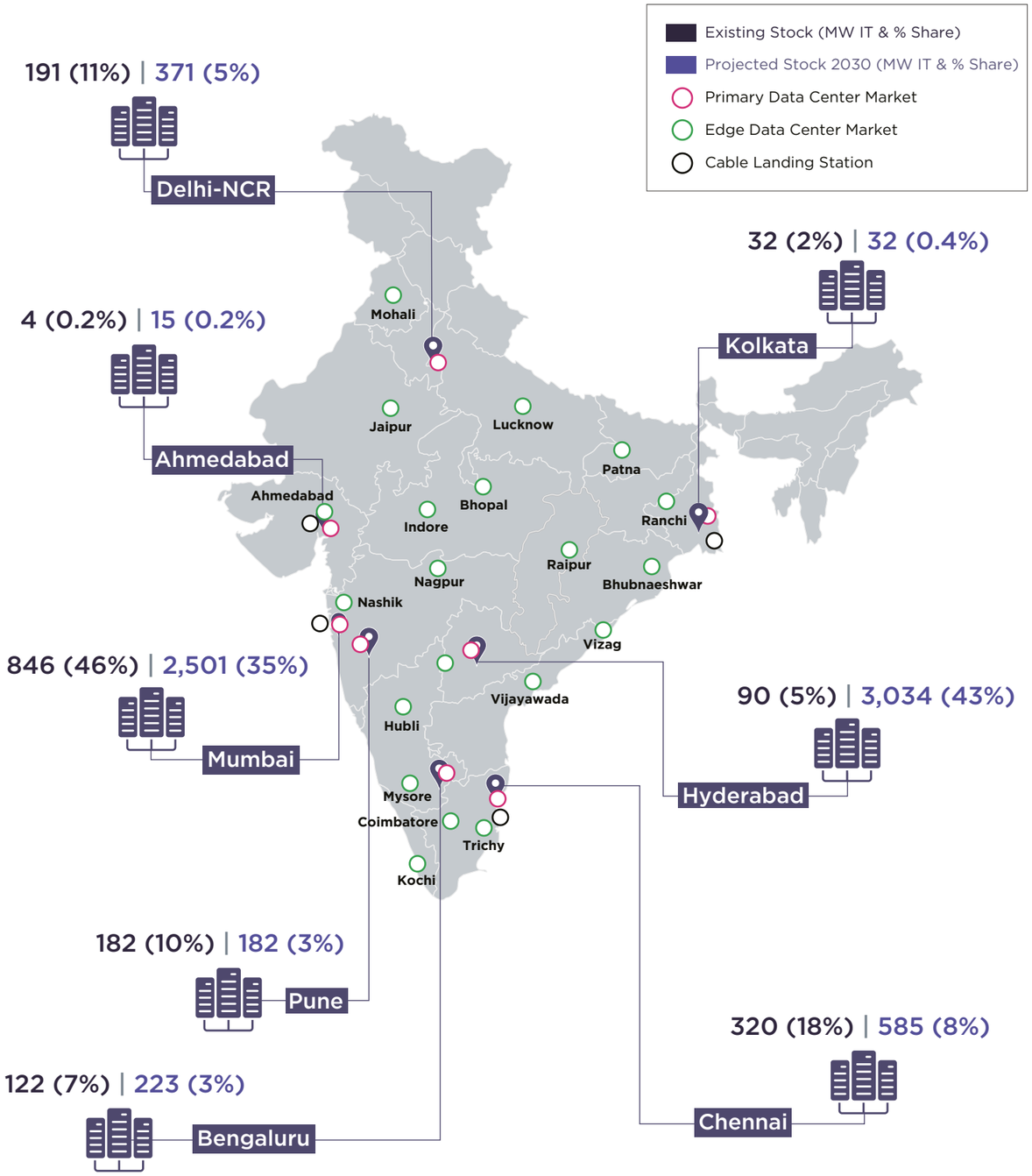


Source: Savills India Research

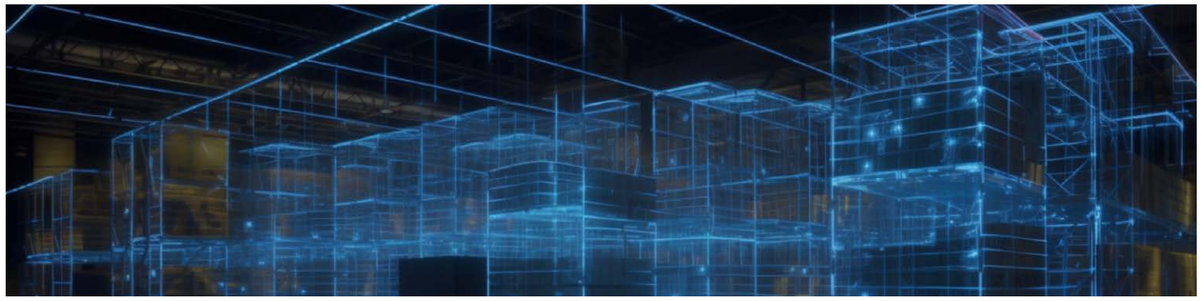
India's operator-based data centre capacity is expected to grow from around 2 GW IT in H1 2026 to over 7 GW IT by 2030, led by Mumbai and Hyderabad.

While Chennai, Bengaluru and Delhi-NCR will remain key markets, the next growth phase is expected to be more geographically diverse. Emerging Tier-II locations are backed by proposed projects from major players that could evolve into new data centre clusters.

EVOLVING DATA CENTRE FOOTPRINT: EXISTING AND UPCOMING STOCK



Source: Savills India Research



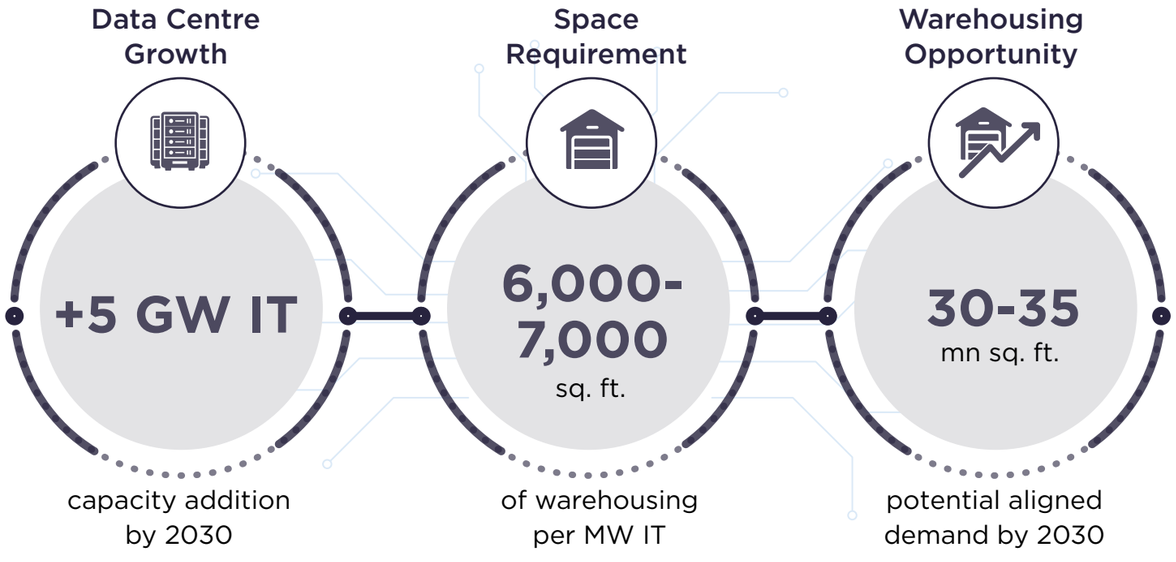
Sizing the Warehousing Opportunity: From MW IT to Mn Sq. Ft.

The growing scale and complexity of data centres is driving demand for a broader ecosystem of specialised supply chain, logistics and support infrastructure. From IT hardware and electrical equipment to cooling systems, energy storage solutions and connectivity infrastructure, every component requires efficient sourcing, transportation, storage, staging and installation. As a result, the economic impact of data centre growth is creating new opportunities for aligned warehousing, specialised logistics and supporting industrial infrastructure.

Global benchmarks indicate that every 1 MW IT of data centre capacity typically generates demand for 6,000-7,000 sq. ft. of aligned warehousing space for equipment storage, staging, spare-parts management and logistics support. As India's data centre ecosystem evolves along similar lines, these benchmarks are expected to be equally relevant domestically. With over 5 GW IT of new capacity projected by 2030, India could witness 30-35 mn sq. ft. of aligned warehousing demand by 2030.

The opportunity is expected to be concentrated in markets witnessing the highest data centre capacity additions. Hyderabad and Mumbai are likely to emerge as the key beneficiaries, followed by Chennai, Delhi-NCR, Bengaluru, and Pune. As these hubs continue to expand, they could support the development of dedicated warehousing and logistics facilities in close proximity to major data centre clusters. Over the longer term, the gradual expansion of data centre activity into Tier-II cities may create additional opportunities for aligned warehousing demand.

ESTIMATED DATA CENTRE-ALIGNED WAREHOUSING DEMAND BY 2030



Source: Savills India Research

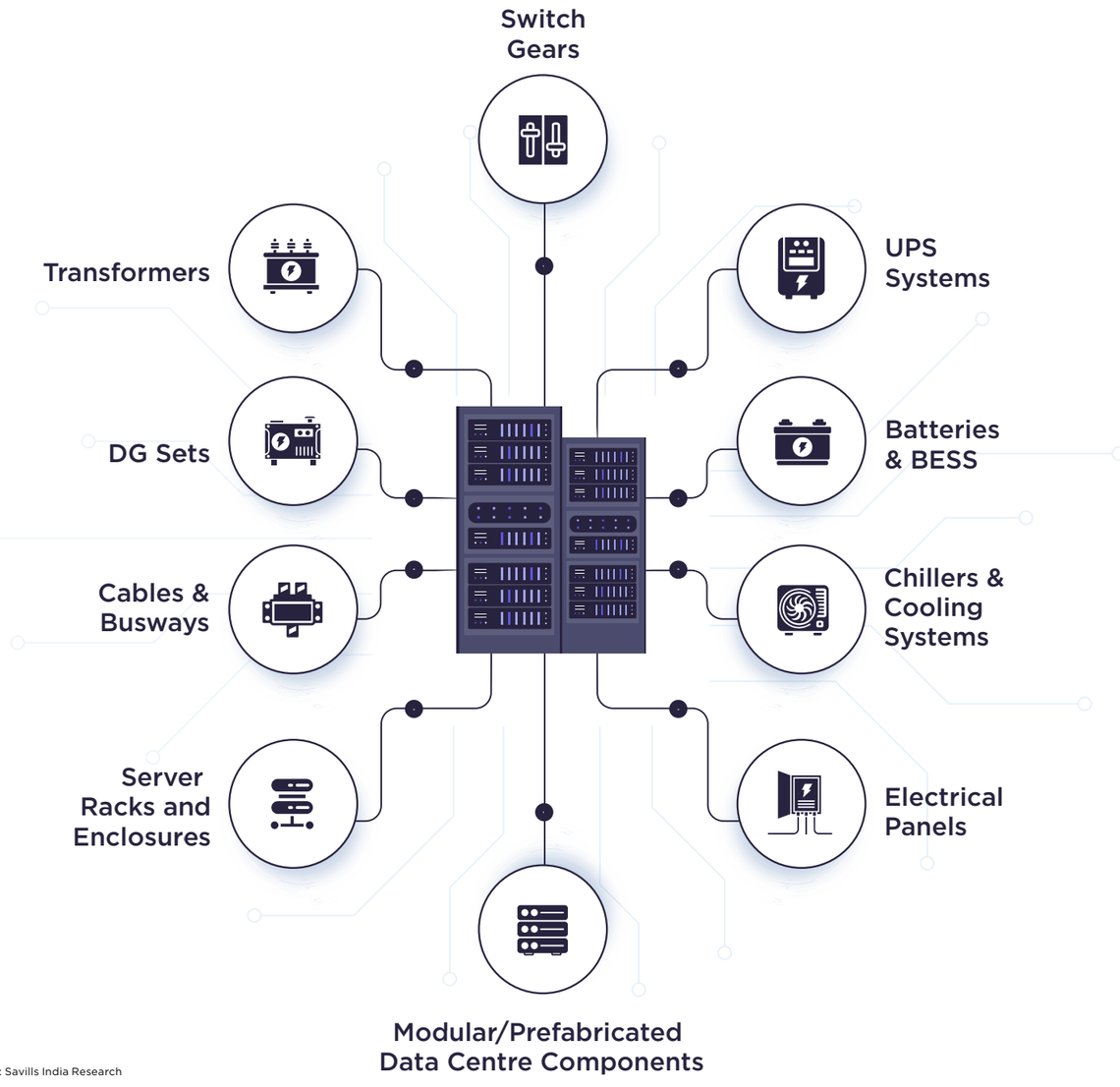
BEYOND DATA CENTRES: RISE OF THE SUPPORTING ECOSYSTEM

Emerging Data Centre-Led Manufacturing Opportunity

India's data centre expansion has the potential to create a sizeable manufacturing opportunity alongside the growth of digital infrastructure. The sector's high capital intensity and continued capacity additions can generate sustained demand for critical equipment across power distribution, backup power, cooling, energy storage and modular infrastructure.

The opportunity extends beyond the assembly of finished equipment. Increasing scale can support local component production, engineering, fabrication, system integration, testing and specialised manufacturing, enabling Indian suppliers to capture a progressively larger share of the data centre value chain. Greater localisation can also strengthen supply-chain resilience, improve delivery timelines and enhance servicing capabilities, while encouraging global suppliers to manufacture locally and enabling Indian companies to expand into higher-value data centre equipment and components.

KEY MANUFACTURING OPPORTUNITY SEGMENTS



Source: Savills India Research

What's Next

As India's data centre market continues to scale, the impact is expected to extend well beyond the data centre campus. The next phase of growth is likely to create demand across a broader ecosystem encompassing aligned warehousing, manufacturing, logistics and infrastructure support. Together, these opportunities could unlock significant industrial real estate demand across major data centre hubs.

Warehousing Multiplier

Aligned warehousing is expected to evolve beyond traditional storage functions. Demand is likely to increase the amount of equipment staging, spare-parts management, project logistics, deployment support and maintenance operations.

Future growth in data centre-aligned warehousing is expected to be driven by the emergence of dedicated logistics hubs around major data centre clusters, increasing requirements for spare-parts storage and maintenance support, and the growing adoption of modular and prefabricated construction methods. At the same time, rapid AI-led infrastructure expansion and the proliferation of edge data centres are likely to create new warehousing requirements for equipment storage, staging, deployment and lifecycle management, further strengthening the demand for specialised warehousing solutions.

Manufacturing Multiplier

Beyond aligned warehousing, data centre growth is expected to drive demand for locally manufactured power, cooling and digital infrastructure equipment. As supply chains continue to localise, demand for industrial land, manufacturing facilities and assembly units is likely to increase.

India's expanding data centre industry is expected to create significant opportunities for domestic manufacturing of critical infrastructure components, including power systems, cooling equipment, energy storage solutions, server racks and modular data centre modules. As localisation gathers pace, investments in manufacturing and assembly facilities are likely to grow, strengthening supply chains while generating additional demand for industrial and logistics real estate.



savills

Savills

Savills is a global real estate services provider listed on the London Stock Exchange. Savills operates from over 700 owned and associate offices, employing more than 42,000 people in over 70 countries throughout the Americas, the UK, Europe, Asia Pacific, Africa and the Middle East, offering a broad range of specialist advisory, management and transactional services to clients all over the world.

Savills India

Savills India is a group company of Savills PLC and is a premier professional international property consulting firm. With full-service offices in Bengaluru, Mumbai, Delhi-NCR, Chennai, Pune, Hyderabad, Kolkata and Ahmedabad, the firm serves occupiers, investors and developers of real estate.

Savills India provides services across office leasing, project management, capital markets, valuations, research, consulting, industrial and logistics and residential services. Started in India in 2016, the company employs over 900 professionals.

KEY CONTACTS

Arvind Nandan
Managing Director
Reseach & Consulting
arvind.nandan@savills.in

Srinivas N
Managing Director
Industrial & Logistics Services
srinivas.n@savills.in

AUTHORS

Devadharshini R
Assistant Manager
Research & Consulting
devadharshini.r@savills.in

Srinivasa Reddy
Senior Director
Research & Consulting
srinivasa.reddy@savills.in

MEDIA QUERIES

Shreya Ganguly
General Manager
shreya.ganguly@savills.in

INDUSTRIAL & LOGISTICS CONTACTS

Namit Kanchan
Executive Director - Chennai
Industrial & Logistics
namit.kanchan@savills.in

Vaibhav Mahurkar
Executive Director-
Head of North
Industrial & Logistics
vaibhav.mahurkar@savills.in

Sandeep Narayan Singh Deo
Executive Director - Bengaluru & Hyderabad
Industrial & Logistics
sandeep.singhdeo@savills.in

Shoueb Chishti
Executive Director - Mumbai
Industrial & Logistics
shoueb.chishti@savills.in

Sumit Ghosh
Executive Director - Pune
Industrial & Logistics
sumit.ghosh@savills.in

Arif Masud
Director & Lead - East
Industrial & Logistics
arif.masud@savills.in

INDUSTRIAL INVESTMENT SERVICES

Sandeep Narayan Singh Deo
Executive Director & Head
sandeep.singhdeo@savills.in

PROJECT MANAGEMENT SERVICES-INDUSTRIAL

Velprakash K
Senior Executive Director
Project Manaagement
velprakash.k@savills.in

LEADERSHIP

Anurag Mathur
Chief Executive Officer
Savills India
anurag.mathur@savills.in

Kaustuv Roy
Managing Director, Mumbai
kaustuv.roy@savills.in

Naveen Nandwani
Managing Director, Bengaluru & Hyderabad
and Commercial Advisory & Transactions
naveen.nandwani@savills.in

Anup Vasanth
Managing Director, Chennai
& Head, Data Centre Services
anup.vasanth@savills.in

Rajat Johar
Managing Director, Delhi-NCR
rajat.johar@savills.in

Sumeet Bhatia
Managing Director, Pune &
Capital Markets Services
sumeet.bhatia@savills.in

Sumit Rakshit
Managing Director
Project Management Services
sumit.rakshit@savills.in

Srinivas N
Managing Director
Industrial & Logistics Services
srinivas.n@savills.in

Archit Sood
Managing Director
Valuation & Professional Services
archit.sood@savills.in

Manav Thadani
Founder & Chairman
Hotelivate-Savills
manav@hotelivate.com

Shveta Jain
Managing Director
Residential Services
shveta.jain@savills.in

Arvind Nandan
Managing Director
Reseach & Consulting
arvind.nandan@savills.in

Nitin Bahl
Managing Director
Sales & Strategy
nitin.bahl@savills.in

Gurugram
3-A&B, 2nd Floor, Building 9B
DLF Cyber City, Phase 3
Sector 24, Gurugram 122 002
Haryana, India

Bengaluru (Central Services)
Vaishnavi Tech Park, WM9C+995
Sarjapur Main Rd, Bellandur
Bengaluru 560 103
Karnataka, India

Hyderabad
5th Floor, DivyaSree Solitaire, Plot No. 14 & 15
Software Units Layout, Sy No 64, Madhapur
Serilingampally Mandal, Hyderabad 500 081
Telangana, India

Mumbai
Unit No 2604, 26th Floor
One Lodha Place, Senapati Bapat Marg
Lower Parel, Mumbai 400 013
Maharashtra, India

Chennai
5th Floor, SKCL Harmony Square
New No. 48 & 50, Praksam Street
T. Nagar, Chennai 600 017
Tamil Nadu, India

Ahmedabad
2nd Floor, Capital One- DevX
Ashok Vatika, Bopal-Ambli Road
Ahmedabad- 380 058
Gujarat, India

Bengaluru
Ground Floor, Prestige Summit
St. Johns Road, Ward No. 90, Halasuru
Sivan Chetty Gardens, Bengaluru 560 042
Karnataka, India

Pune
Unit #4, 13th Floor
Phoenix Fountainhead Tower 2
Phoenix Market City, Viman Nagar
Pune 411 014, Maharashtra, India

Kolkata
Apeejay Business Centre
15 Park Street, Apeejay House
Block-A, 6th Floor, Kolkata 700 016
West Bengal, India

savills

savills.in

Savills, the international real estate advisor established in the UK since 1855 with a network of over 700 offices and 42,000 associates globally.

This document is prepared by Savills for information only. Whilst the information shared above has been shared in good faith and with due care with an endeavour to keep the information up to date and correct, no representations or warranties are made (express or implied) as to the accuracy, completeness, suitability or otherwise of the whole or any part of the deliverables. It does not constitute any offer or part of any contract for sale.

This publication may not be reproduced in any form or in any manner, in part or as a whole without written permission of the publisher, Savills.

© Savills India 2026.