US Data Center Daily Briefing

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KEY THEMES

- AirTrunk proposed US$30 billion / 5GW India buildout by 2030, only ~600MW contracted
- AirTrunk's verified base is ~600MW Lumina pipeline across Mumbai, Chennai, Hyderabad
- STT GDC acquires Repro India's 14,093 sq m Mahape parcel for ₹282 crore
- STT's Navi Mumbai cluster: 28.4 MW live plus 48 MW and 42 MW under development

The 600MW you can underwrite vs. the 5GW you can't

There is a difference between a press release and a backlog. AirTrunk's June 5, 2026 newsroom statement that it "plans to invest more than INR 3,000 billion (US$30 billion) in India by 2030" (AirTrunk) is official at the company level — not trade-press echo — and India's Prime Minister's Office amplified it the same day, noting plans "to invest around Rs. 3 lakh crore ($30 billion) in India and develop 5 GW of data centre capacity" (PMO). But the same release leans on conditional language — "plans to invest," "proposed investment program," "currently being considered" — and the only contracted base underneath the 5GW headline is the ~600MW pipeline across Mumbai, Chennai, and Hyderabad inherited via the April 2026 Lumina CloudInfra acquisition (AirTrunk). The gap between a verified 600MW and an aspirational 5GW is the whole story.

- AirTrunk's $30bn / 5GW India plan is official — and still proposed – Blackstone- and CPPIB-backed AirTrunk frames the program as a "proposed investment program… currently being considered," anchored by a contracted ~600MW Lumina base.
- STT GDC buys Repro's Mahape parcel for ₹282 crore – Repro India's BSE/NSE filings confirm the 14,093 sq m Plot No. 50/2 transfer in MIDC Mahape, Navi Mumbai, completed via Assignment Deed on May 22, 2026.
- AirTrunk's only contracted India base is 600MW – the April 20, 2026 Lumina release pegs the planned portfolio at ~600 MW with up to US$5 billion of future development potential.
- PMO amplifies the AirTrunk number – central-government awareness confirmed, but no state MoU, land allotment, or capacity allocation tied to the 5GW claim was published.
- Robin Khuda met Maharashtra and Andhra Pradesh ministers – AirTrunk confirms market engagement, not committed projects, in either state.

- STT's Navi Mumbai cluster keeps growing – STT lists Navi Mumbai 1 at 28.4 MW operational, plus 48 MW and 42 MW under development in MIDC Mahape, making redevelopment of the Repro parcel the likely intent.

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