



DIGITAL FORENSICS IN INDIA

Market Insights & Growth Roadmap 2025

₹11,829 Crore Projected Market Value by 2030

From Investigation to Innovation
Understanding India's Journey to Becoming a
Global Digital Forensics Leader

Based on Comprehensive Research by Deloitte India & Data Security Council of India (DSCI)
Featuring insights from 1,000+ tax and finance leaders, government officials, forensic experts,
and industry professionals across 27 countries

The Explosive Growth Story

India's Digital Forensics Market: A 7x Growth Trajectory

India stands at the precipice of a digital forensics revolution. The market, currently valued at 1,603 crore in FY 2023-24, is projected to witness unprecedented growth, reaching an estimated 11,829 crore by FY 2029-30.

This represents a remarkable Compound Annual Growth Rate (CAGR) of approximately 40%- one of the fastest-growing segments in the global cybersecurity landscape.

This explosive growth isn't happening in isolation- it's being driven by four critical forces reshaping India's digital landscape:



The Cybercrime Tsunami

India is experiencing an unprecedented surge in cybercrime that has fundamentally altered the threat landscape. The numbers tell a sobering story:

The Scale of the Crisis:

- **2023:** 15,56,218 complaints—a staggering 5,900% increase in just four years
- **Current Rate:** Over 7,000 complaints daily—making India one of the most cyber-targeted nations globally
- **2024 (First 4 months):** 7,40,957 complaints
- **Per Capita Impact:** 129 cybercrimes per lakh population



The Digital Explosion

India's digital transformation has been nothing short of revolutionary, creating both unprecedented opportunities and complex security challenges:

The Digital Infrastructure:

- 97.1 Crore (971 million) registered internet users- second-largest online population globally
- Digital payment transactions grew from ₹2,071 crore in FY 2017-18 to ₹18,592 crore in FY 2023-24
- Gross Merchandise Value (GMV): Over ₹5 lakh crore in FY 2023 (22% YoY growth)

This digital proliferation creates an exponentially expanding attack surface. Every smartphone, IoT device, digital payment, and cloud storage instance generates forensic data points that must be secured, monitored, and when crimes occur investigated with precision.

REGULATORY PUSH: Compliance as a growth driver

India's regulatory framework is undergoing rapid evolution, creating mandatory demand for digital forensics capabilities:

Key Legislative Developments:



The Compliance Imperative: Research indicates that over 90% of criminal cases now involve digital evidence- from murder investigations requiring mobile phone analysis to corruption cases traced through digital financial trails.

This has transformed digital forensics from a specialized capability to a fundamental requirement for justice delivery.

GOVERNMENT INVESTMENT: Building National Capability

The Indian government has recognized digital forensics as critical national infrastructure, backing this recognition with substantial investment:

National Forensic Infrastructure Enhancement Scheme (NFIES)

Total Outlay: ₹2,254 crore (FY 2024-25 to FY 2028-29)

Focus Areas:

- Establishing state-of-the-art digital forensic labs in every state
- Building capacity for mobile, cloud, and IoT forensics
- Procuring advanced forensic tools and technologies
- Creating specialized cybercrime investigation units

1 Indian Cybercrime Coordination Centre (I4C)

2 Cyber Commandos Programme

3 National Forensic Sciences University (NFSU)

4 MeitY R&D Initiatives

5 Infrastructure Modernization

This comprehensive government push is not merely about investigation- it's about building a robust forensic ecosystem that can deter cybercrime, enable swift justice, and position India as a global leader in digital security.

Digital Forensics Market Deep Dive

The Indian digital forensics market is multifaceted, with distinct characteristics across different dimensions. Understanding these segmentations provides critical insights into where opportunities lie and how the market is evolving.

The **Technology Stack**

Software Solutions: 54% Market Share

Software forms the backbone of digital forensics, representing the largest market segment. This includes:

Forensic Analysis Tools:

- Data Acquisition Software
- Mobile Forensics Platforms
- Computer Forensics Tools: Disk analysis, file recovery, registry analysis
- Network Forensics
- Memory Forensics



Services: 27% Market Share

The services segment is the fastest-growing component, driven by the shortage of in-house expertise and the complexity of modern investigations:

Managed Forensic Services (MFS)

- **Incident Response:** 24/7 breach response, containment, & investigation
- **Forensic Investigations:** Third-party investigations for legal, compliance, and HR matters

Consulting Services

- Forensic Readiness
- Policy Development
- Risk Assessments
- Compliance Consulting

Training & Capacity Building

- Certification Programs
- Custom Training
- Law Enforcement Training
- Academic Programs

Discovery & Data Management:

The services market is expected to grow faster than hardware and software, particularly in the private sector, where 81% of organizations now use some form of outsourced forensic services.

Hardware: 20% Market Share

Hardware remains essential despite software dominance, particularly for government agencies conducting physical evidence collection:

- Forensic Workstations
- Specialized Equipment:
- Data Acquisition Devices
- Challenges in Hardware Segment

SEGMENTATION BY END-USER

Who's Buying?

Government & Law Enforcement: 81% Market Share

The government sector overwhelmingly dominates the Indian digital forensics market, both in absolute terms and strategic importance:

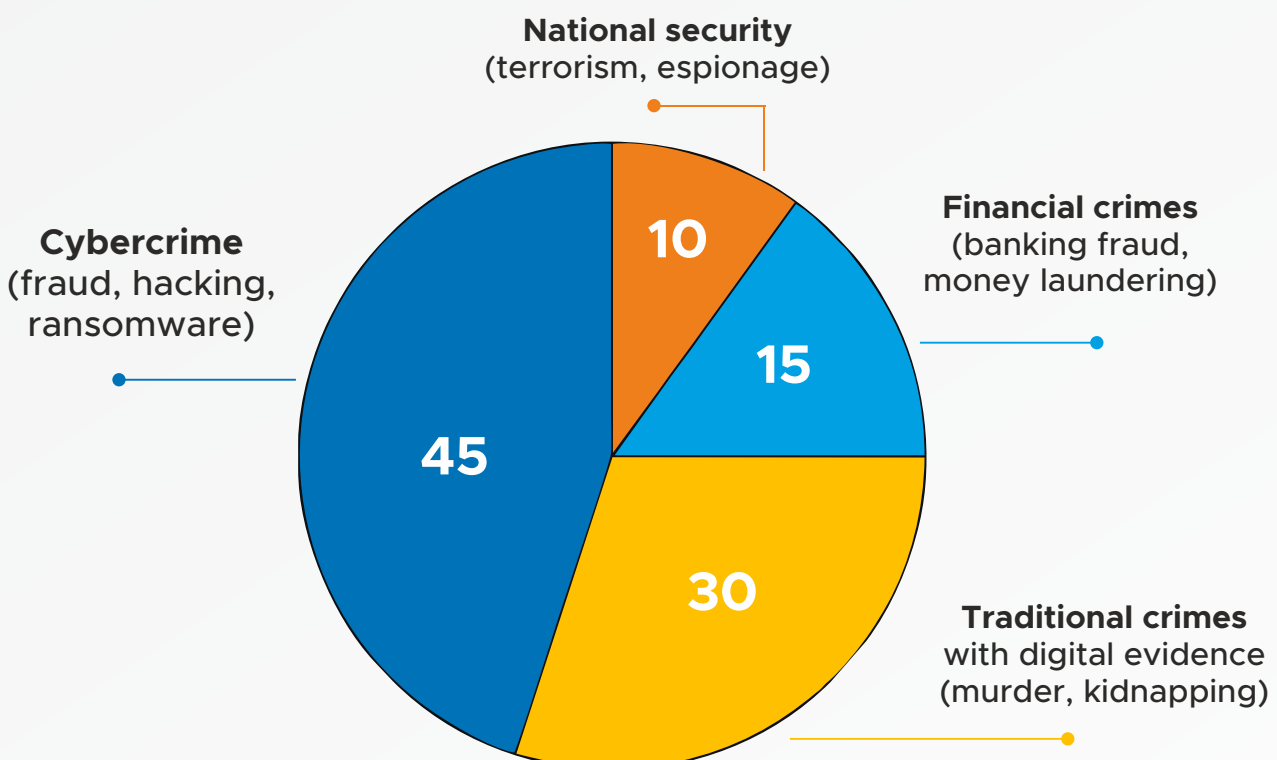
Primary Government Consumers:



Law Enforcement Agencies (Largest Segment)

- State Police Cyber Cells
- Central Bureau of Investigation (CBI)
- National Investigation Agency (NIA)
- Enforcement Directorate (ED)
- Income Tax Department
- Customs & GST

Investigation Types





Forensic Science Laboratories

- Central Forensic Science Laboratories (CFSLs): 7 labs across India
- State Forensic Science Laboratories
- Specialized Labs
- Regional Center

- Defense Cyber Agency
- Intelligence Bureau (IB)
- Research & Analysis Wing (RAW)
- National Technical Research Organisation (NTRO)



Defense and Intelligence Agencies



Regulatory and Compliance Bodies

- Reserve Bank of India (RBI), Securities and Exchange Board of India (SEBI), Telecom Regulatory Authority of India (TRAI), Competition Commission of India (CCI), Anti-competitive practices

Special Courts: Cybercrime courts ●
requiring digital evidence examination

Forensic Expert Panels: ●
Court-appointed forensic experts

Legal Education: Training judges ●
and lawyers on digital evidence



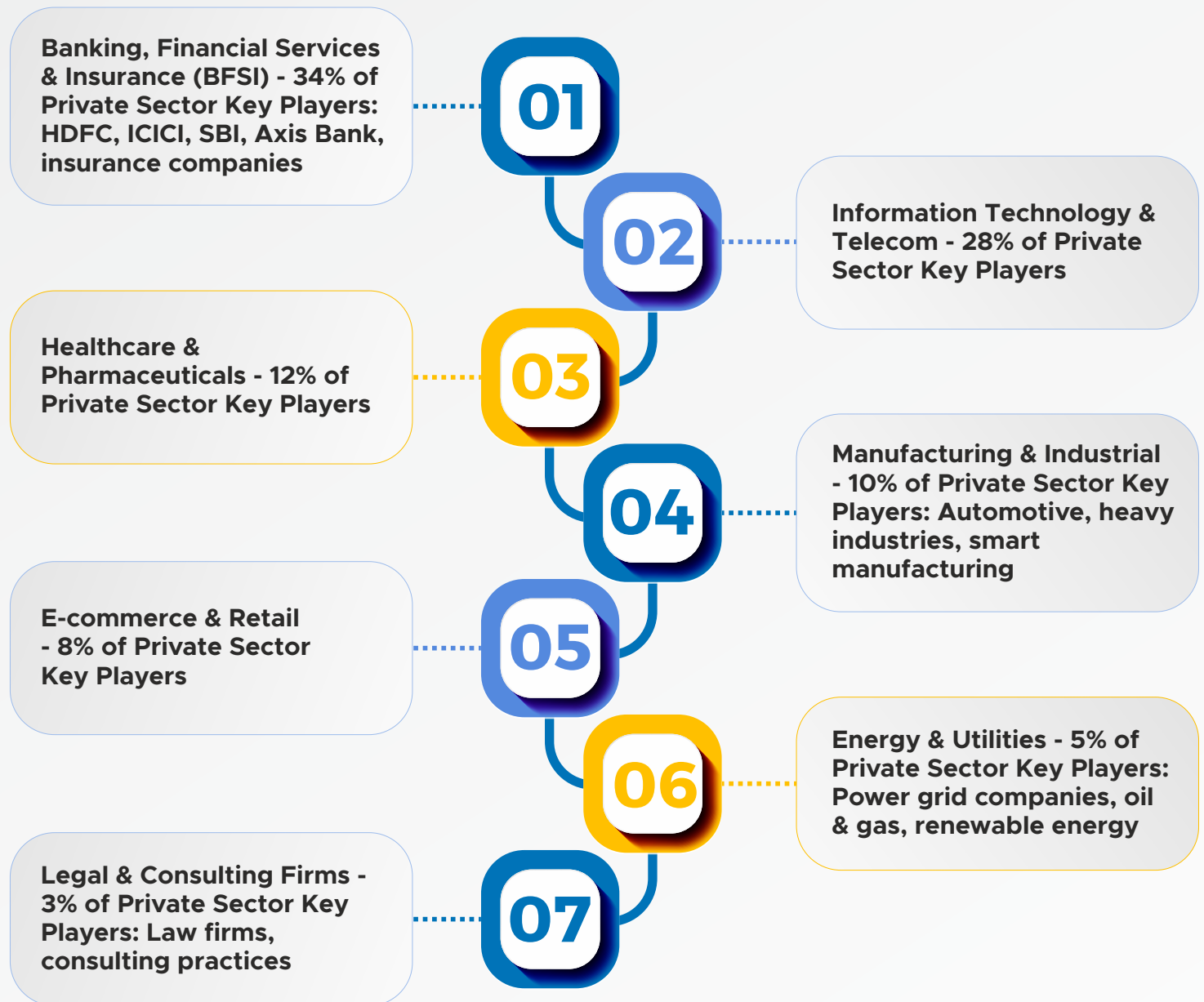
Judiciary

Private Sector

19% Market Share (Fastest Growing)

While smaller in absolute terms, the private sector represents the highest growth potential, expanding at an estimated 50%+ CAGR:

Primary Private Consumers:



PELORUS

Enabling Technology in the Right Direction

Enabling Technology

by

Reinventing & Riding the Technology Wave