Brazil Data Center Market - Investment Analysis and Growth Opportunities 2021-2026

https://marketpublishers.com/r/B757A42A65F7EN.html

Date: June 2021
Pages: 90
Price: US$ 2,500.00 (Single User License)
ID: B757A42A65F7EN

Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Brazil Data Center Market Report

Brazil Data Center Market to reach a CAGR of 10% during the period 2021-2026

The growing digitalization in the country, increasing adoption of the cloud, the introduction of the local data security law by the local government, and the shift from on-premises to colocation data centers are some of the major factors driving the market. Sao Paulo will witness investments from Equinix and Scala Data Centers in seven data center facilities in the coming years. Brazil is the top data center market in Latin America, with about 17 unique third-party data center service providers operating over 44 facilities in the country. The market has grown significantly, with an increase in hyperscale data center development and investment by cloud service providers. The COVID-19 pandemic has also been a strong market enabler for digital transformation initiatives across private and public sector enterprises in Brazil.

The report considers the present scenario of the Brazil data center market and its market dynamics for the forecast period 2021?2026. It covers a detailed overview of several growth enablers, restraints, and trends in the market. The study includes the demand and supply aspects of the market.

KEY HIGHLIGHTS OF THE REPORT:

    5G networks to boost the country's digital economy and heighten demand for high bandwidth networking infrastructure.

In 2020, the country's major data center service providers were Ascenty, Equinix, Scala Data Centers, and ODATA.

Development of the hyperscale facilities is likely to increase in the adoption of more than 10 kW PDU racks in the market.

In Brazil, there are over 75 Uptime Institute Tier III Certified facilities, which includes colocation and telecommunication, service providers.

In 2020, Sao Paulo witnessed investment in around four facilities, with approximately USD 295 million.

Rio de Janeiro, Sumare, and Hortolandia will witness significant investments from Ascenty and ODATA, adding an IT load capacity of more than 70 MW.

BRAZIL DATA CENTER MARKET INSIGHTS

Brazil is the leading data center market in Latin America, driving over 40% of the overall investment in the region.

Amazon Web Services (AWS) plans to invest over USD 230 million over the next two years to expand its data center presence in Brazil and strengthen its cloud infrastructure in Latin America.

Brazil is the largest data center colocation market in the Latin America region and generated USD 680 million in 2020.

Private cloud spending in Brazil is valued at around USD 600 million in 2021, with a 10% growth from 2020.

Remote monitoring and management systems tools are gaining traction in the Brazilian data center market due to the ongoing COVID-19 pandemic.

In 2021, the country will spend around USD 400 million on various Artificial Intelligence data center projects.

The shift of workloads from on-premises to colocation facilities boosts retail and wholesale colocation in the Brazilian data center market.

BRAZIL DATA CENTER VENDOR LANDSCAPE

Brazil currently hosts over 75 data center facilities. Sao Paulo is the major market for data center development in Brazil. It is a prominent location for the establishment of cloud region and hyperscale facilities. For instance, Amazon Web Services is opening its cloud region in Sao Paulo. Ascenty, Equinix, ODATA, and Scala Data Centers are investing in developing the Tier III facilities, which are opened and were under construction in 2020. Microsoft plans to open a cloud region in Rio de Janeiro that is expected to be operational in H2 2021. Ascenty (Digital Realty), Equinix, ODATA, and Scala Data Centers are the key investors in the Brazil data center market.

IT Infrastructure Providers

Arista Networks

Cisco

Dell Technologies

Hewlett Packard Enterprise (HPE)

Huawei Technologies

IBM

Lenovo

NetApp

Pure Storage

Construction Contractors & Sub Contractors

AECOM

Aceco TI

Constructora Sudamericana S.A.

Fluor Corporation

ZFB Group

Jacobs Engineering Group

Quark

Support Infrastructure Providers

ABB

Axis Communications

Caterpillar

Eaton

Generac Power Systems

Honeywell International

Legrand

Munters

Rolls-Royce Power Systems

Rittal

Siemens

Schneider Electric

STULZ

Vertiv Group

Data Center Investors

Ascenty (Digital Realty)

Equinix

ODATA

Scala Data Centers

Quantico Data Center

REPORT COVERAGE:

This report analyzes the Brazil Data Center market share and elaborative analysis of the existing and upcoming facilities, data center investments in terms of IT, electrical, mechanical infrastructure, general construction, and geography. It discusses market sizing and estimation of investment for different segments. The segmentation includes:

EXISTING VS. UPCOMING DATA CENTERS

Existing Facilities in the country (Area and Power Capacity)

Fortaleza

Hortolandia

Jundiai

Rio De Janeiro

Sao Paulo

Sumare

Vinhedo

Other Cities

List of Upcoming Facilities in the country (Area and Power Capacity)

BRAZIL DATA CENTER INVESTMENT COVERAGE

Infrastructure Type

IT Infrastructure

Electrical Infrastructure

Mechanical Infrastructure

General Construction

IT Infrastructure

Servers

Storage Systems

Network Infrastructure

Electrical Infrastructure

UPS Systems

Generators

Transfer Switches & Switchgears

PDUs

Other Electrical Infrastructure

Mechanical Infrastructure

Cooling Systems

Rack Cabinets

Other Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

Chillers

Cooling Towers, Condensers, and Dry Coolers

Economizers & Evaporative Coolers

Other Cooling Units

General Construction

Building Development

Installation & Commissioning Services

Building & Engineering Design

Physical Security

Data Center Infrastructure Management (DCIM)

Tier Standard

Tier I & Tier II

Tier III

Tier IV

Geography

Sao Paulo

Other Cities

WHY SHOULD YOU BUY THIS RESEARCH?

Market size available in the area, power capacity, investment, and colocation revenue.

An assessment of the Brazil data center investment in the market by colocation, hyperscale, and enterprise operators.

Data center investments in terms of area (square feet) and power capacity (MW) across cities in Brazil.

A detailed study of the existing Brazil data center market landscape, an in-depth industry analysis, and insightful predictions about the Brazil data center market size during the forecast period.

Snapshot of existing and upcoming third-party facilities in Brazil

Facilities Covered (Existing): 44

Facilities Identified (Upcoming): 15

Coverage: Sao Paulo, Rio De Janerio, Hortolandia, Fortaleza, Sumare, Vinhedo, Jundiai, and Other Cities

Existing vs. Upcoming (Data Center Area)

Existing vs. Upcoming (IT Load Capacity)

Data center colocation market in Brazil

Market Revenue & Forecast (2020-2026)

Retail Colocation Pricing

Wholesale Colocation Pricing

Classification of the Brazil data center market investments into multiple segments and sub-segments (IT, electric, mechanical, and general construction) with market sizing and forecast

A comprehensive analysis of the latest trends, growth rate, potential opportunities, and growth restraints, and prospects for the market

Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the market.

A transparent research methodology and the analysis of the demand and supply aspect of the market.

KEY QUESTIONS ANSWERED:

1. What is the market size of Brazil's data center?
2. How many existing data centers are there in Brazil?
3. What are the expected upcoming facilities in Brazil during the period 2021–2026?
4. What is the growth rate of the Brazil Data Center Market?
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