

Data Center Construction Market in Latin America - Industry Outlook and Forecast 2019-2024

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Abstracts

The Latin America data center construction market is projected to grow at a CAGR of around 7% during the forecast period.

The Latin America data center construction market is witnessing significant investments from data center operators such as Ascenty (Digital Realty and Brookfield Infrastructure), Equinix, ODATA, Telefónica, Axtel, Telecarrier, and Entel. The adoption of cloud-based and managed services and colocation and cloud connectivity services is expected to be a major driver for Latin America data center market growth. The growing number of data centers in Latin America and the increase in awareness to reduce energy consumption have led to the higher adoption of DCIM solutions, which bring significant saving to data center OPEX. Hence, the growing implementation of DCIM solutions in data centers is likely to drive the market in Latin America. Further, the use of artificial intelligence and robot monitoring systems is also expected to contribute in the growth of Latin America data center construction market during the forecast period.

The availability of tax incentives in several Latin American countries for the data center development for both local and global investors is one of the major factors driving the Latin America data construction market during the forecast period.

The following factors are likely to contribute to the growth of the Latin America data center construction market during the forecast period:

Increased interest of modular/ containerized/ POD data center deployment

Increased adoption of free cooling in data centers

Adoption of edge data centers deployments

This research report on the Latin America data center construction market covers market sizing & forecast, market share, industry trends, growth drivers, and vendor analysis. The market study includes insights on segmentation by general construction (building development, installation and commissioning services, building design, physical security, and DCIM), electrical infrastructure (UPS systems, generators, transfer switches and switchgears, rack PDUs, and others), mechanical infrastructure ((cooling systems: CRAC & CRAH units, chiller units, cooling towers, and dry coolers, economizers and evaporative coolers, and other units) racks and other infrastructure), tier standards (tier I & II, tier III, & tier IV), and geography (Brazil, Colombia, Chile, and Rest of Latin America).

The study considers the present scenario of the Latin America data center construction market dynamics for the period 2018-2024. It covers a detailed overview of several market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. The report also profiles and examines leading companies and other prominent companies operating in the market

Latin America Data Center Construction Market: Segmentation

This research report includes detailed market segmentation by infrastructure, general construction, mechanical infrastructure, tier standards, and geography. The demand for generators in the Latin America data center market is expected to grow significantly due to the unreliability of power supply in several countries in Latin America. However, to reduce carbon emission, natural gas and bi-fuel generators are expected to gain traction in the market. The use of DRUPS systems is likely to gain prominence in the region, as they combine both battery and flywheel UPS topology with a diesel generator to provide backup during power outages. UPS systems of 2N redundancy are likely to gain significant traction in the Latin America data center construction market due to the increasing Greenfield data center development (generally more than 10MW). The market will also witness the emergence of lithium-ion battery systems as they are more efficient and safer than VRLA batteries.

The growing number of greenfield and modular facilities projects is likely to continue in the market over the next few years. The modular construction will add significant revenue to the market during the forecast period. Besides, the need for the skilled workforce with expertise in the construction and operation of facilities is likely to grow in

the Latin America data center construction market. Due to increased uptime and efficacy, the adoption of tier III standards comprising N+1 redundancy will gain propulsion, thus driving the Latin America data center construction market.

The growth of cooling system markets depends on the construction of data centers, type of adopted systems, redundancy, cost, and growth of rack power density. The growing construction of data centers in Latin America will increase the adoption of 45U, 47U, and 48U rack units. The market will also witness increased containment-based design with up to 20 racks. Further, piping units, pump systems, and valves used during the construction of facilities are major revenue generators for the other infrastructure segment.

Over 85% of certified data centers are Tier III types. Most facilities in Brazil, Colombia, Chile, Argentina, Mexico, and Peru are Tier III certified. However, several facilities are being constructed as colocation data centers. Most new facilities are designed as per Tier III standards with a minimum of N+1 redundancy; however, flexible design can help them to be reconfigured up to 2N+1 redundancy as and when the demand arises. The increased investment by hyperscale developers and the adoption of modular data centers of tier IV standards are expected to boost the Latin America data center construction market.

Market Segmentation by General Construction

Building Development

Installation and Commissioning Services

Building Design

Physical Security

DCIM

Market Segmentation by Electrical Infrastructure

UPS System

Generators

Transfer Switches and Switch Gear

Rack PDUs

Others

Market Segmentation by Mechanical Infrastructure

CRAC & CRAH Units

Chiller Units

Cooling Tower and Dry Coolers

Economizer and Evaporative Coolers

Other Units

Market Segmentation by Tier Standards

Tier I & II

Tier III

Tier IV

Latin America Data Center Construction Market: Geography

The data center construction market in Brazil is expected to attract high investments from colocation providers during the forecast period. For instance, The national innovation and technology funding agency FINEP (Funding Authority for Studies and Projects) will allocate \$670 million to Brazilian Smart Industry projects. Thus, the increased investment will boost the Latin America data center construction market.

Colombia is widely gaining momentum in the data center construction market due to the

availability of infrastructure and tax incentives. Further, the increased number of mobile devices and access to the internet will likely to add a greater number of facilities during the forecast period. The growing demand for cloud-based services, internet of things (IoT) and big data analytics has significantly contributed to the growth of the data center market in Chile. Also, substantial investment from big cloud providers such as Google in Chile will bring new job opportunities in the country, thereby boosting the Latin America data center construction market. The investment in improving the digital economy is expected to drive the market among the rest of the countries in Latin America.

Key Profiled Countries

Brazil

Colombia

Chile

Rest of Latin America

Argentina

Ecuador

Peru

Venezuela

Uruguay

Nicaragua

Paraguay

Mexico

Bolivia

Honduras

The Caribbean

Key Vendor Analysis

The Latin America data center construction market is continuing to grow in terms of greenfield and modular data center construction projects. The market is witnessing the increased growth in the region, with high adoption of efficient and modular data center infrastructure solutions. The strong presence of vendors across all three categories - electrical infrastructure, mechanical infrastructure, and general construction - is expected to boost the Latin America data center construction market during the forecast period.

Key Construction Vendors

AECOM

ConstuctoraSudamericana S.A.

Flexenclosure

Aceco TI

ZFB Group

Key Infrastructure Providers

ABB

Eaton

Rittal

KINOLT (Euro-Diesel)

Schneider Electric

STULZ

Vertiv

Key Data Center Investors

Ascenty

Equinix

Google

ODATA

Tigo (MALLICOM)

Prominent Construction Contractors

Fluor Corporation

Holder Construction

Jacobs

Mortenson Construction

Prominent Infrastructure Providers

Active Power

AIRSYS

Alfa Laval

Assa Abloy

Axis Communications

Bosch Security Systems

Caterpillar

Cisco

Cummins

Daikin Applied

Delta Group

Generac Power System

Honeywell International

Intel DCM

Legrand

Mitsubishi

Munters

Nortek Humidity

Panduit

Siemens

Prominent Data Center Investors

EdgeConnex

GTD Group

Telefonica

Key market insights include

1. The analysis of Latin America data center construction market provides market size and growth rate for the forecast period 2018-2024.
2. It offers comprehensive insights on current industry trends, trend forecast, and growth drivers about the Latin America data center construction market.
3. The report provides the latest analysis of market share, growth drivers, challenges, and investment opportunities.
4. It offers a complete overview of market segments and the regional outlook for Latin America data center construction market.
5. The report offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

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