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Data Center Cooling Market in Latin America - Industry Outlook and Forecast 2018-2023

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Abstracts

This market research report on data center cooling market in Latin America offers analysis on market size & forecast, market share, industry trends, growth drivers, and vendor analysis. The market study also includes insights on segmentation by cooling infrastructure (cooling system and other infrastructure), by cooling technique (air-based cooling and water-based cooling), by cooling systems (CRAC & CARH, chiller, cooling towers & dry coolers, and economizers & evaporative coolers), and by geography (Brazil, Chile, Colombia, and rest of Latin America.

Data Center Cooling Market in Latin America - Overview

The rapid development of the computing power in the region and growing demand for innovative technologies such as cloud computing, IoT, and big data analytics across various industries will propel the growth of the data center cooling market in Latin America. The growth of the sectors such as BFSI, healthcare, government, and heavy industries will boost the need for efficient IT infrastructure and data center facilities, thereby, augmenting the demand for cooling systems in the region. The growing requirement for high-performance computing (HPC) and virtualization will result in the increase of rack density to an average of 8-10kW in the Latin American market. The increase in rack power density will fuel the use of in-row and in-rack level cooling solutions in data centers in the region. The increasing investment in the construction of modular data centers in Latin America will attribute to the demand for rack/row cooling solutions in the Latin American market.

The leading vendors in the region are focusing on innovating their product portfolios to introduce low-cost cooling systems, improve functional efficiency and suitable cooling systems that match the capacity of the data center facilities in the region. Countries

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such as Brazil, Chile, Colombia, Mexico, and Peru are the largest revenue contributors in the region. The data center cooling market in Latin America is expected to generate revenues of around $255 million by 2023 and is expected to grow at a CAGR of more than 11% during the forecast period.

Data Center Cooling Market in Latin America - Dynamic

The migration from comfort cooling to precision cooling will drive the growth of the data center cooling market in Latin America. The leading colocation providers such as Ascenty and Equinix are investing in the construction of data centers in Brazil with spaces crossing more than 10,000 square feet area and rack density of around 10kW. The construction of such mega data centers will boost the demand for precision air conditions in the region. Moreover, the development of modular and colocation data centers in countries such as Chile and Colombia will fuel the demand for evaporative coolers, free cooling chillers, and economizers in the region. The rise in the rack power density and increased investment in large data center projects will encourage the use of modern precision cooling systems in Latin America over the next few years.

Data Center Cooling Market in Latin America Segmentation

This market research report includes a detailed segmentation of the market by cooling infrastructure, by cooling technique, by cooling systems, by tier standards, and by geography.

Data Center Cooling Market in Latin America – By Cooling Infrastructure

Demand of high capacity cooling systems to gain popularity in data center cooling market in Latin America

The data center cooling market in Latin America by cooling infrastructure is classified into cooling systems and other infrastructure. The cooling system was the largest segment in the market in 2017 and is projected to grow at a CAGR of more than 11% during the forecast period. The use of air and water cooling systems to reduce the heat generated in data center facilities is leading to the adoption of common cooling infrastructures such as computer room air conditioners (CRAC), computer room air handlers (CRAH), chillers, cooling towers, dry coolers, economizers, and evaporative coolers. Cooling systems with N+N redundancy for tier 3 facilities and 2N redundant infrastructure for tier 4 facilities will boost market growth in the region. Additionally, cooling systems with accessories and systems level monitoring controls will augment

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the growth of this market segment in Latin America. The development of cost-effective and highly functional systems will create new investment opportunities of vendors in the Latin American market.

Data Center Cooling Market in Latin America – By Cooling Technique

Free cooling technique to gain momentum in the data center cooling market in Latin America during forecast period

The cooling technique segment in the data center cooling market in Latin America is divided into air-based cooling and water-based cooling. The air-based cooling technique dominated the market in 2017 and is expected to grow at a CAGR of over 10% during the forecast period. The most widely available air-based cooling solutions in Latin America include CRAC units, free cooling technique solutions, air-cooled chiller-based cooling, and dry coolers. The adoption of free cooling technique will gain immense popularity in the Latin American market over the next few years. Moreover, the implementation of evaporative coolers in data center facilities across Chile and Colombia will drive the growth of this market segment in Latin America.

Data Center Cooling Market in Latin America – By Cooling Systems

CRAC and CRAH units to dominate the market share in the data center cooling market in Latin America during forecast period

The data center cooling market in Latin America by cooling systems is categorized as CRAC & CARH, chiller, cooling towers & dry coolers, economizers & evaporative coolers. The CRAC & CARH unit segment dominated the market share in 2017 and is anticipated to grow at a CARG of over 11% during the forecast period. CRAC & CARH units work with other cooling units such as chillers, cooling tower, dry coolers, economizers, evaporative coolers, and condensers to remove heat in data center facilities. The use of multiple CRAC and CARH units that is split across data halls and containment designs will drive the growth of this market segment in Latin America. The growing popularity of chilled-water cooling and free cooling solutions will create lucrative opportunities for leading players in the Latin America market during the forecast period.

Data Center Cooling Market in Latin America – By Geography

Colocation and cloud hosting providers such as Equinix, Ascenty, and AWS is expected to invest across Latin America during the forecast period

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The geographical segmentation in the data center cooling market in Latin America consists of Brazil, Chile, Colombia, and others. Brazil was the largest region in the market in 2017 and is expected to grow at a CAGR of over 9% during the forecast period. The increasing internet penetration, use of cloud-based services, and expansion of data center operations will boost the demand for data center and innovative cooling systems in the Brazilian market. The establishment of strong connectivity between the US and Brazilian market will drive the growth of region over the next few years. In 2017, data center operators such as Equinix and Ascenty contribute to around 90% of the total investment in Brazil. The expansion of data center development by colocation provides in Brazil to other Latin American market will propel the growth of the data center cooling market in this region.

Key Vendor Analysis

The presence of international infrastructure providers such as Vertiv and Schneider Electric in data center cooling market in Latin America is intensifying the level of competition in the region. The leading vendors in the region are focusing on specific products or complete range of infrastructure solutions suitable for Latin American data centers to sustain the competition in the market. The growing focus on the development of new products that increase the efficiency of data center operations and help reduce the OPEX associated with cooling will help companies gain a larger market share in the region. Moreover, the development of energy-efficient cooling systems that help reduce the carbon emission levels and sustain frequent power outages will transform the market during the forecast period.

The major vendors in the market are:

Rittal

Schneider Electric

STULZ

Trane (Ingersoll Rand)

Vertiv

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Other prominent vendors include AIRSYS, Alfa Laval, Daikin Applied (Daikin Industries), Geist Global, Munters, Nortek Humidity (Condair Group), and Pentair.

Key market insights include

1. The analysis of the data center cooling market in Latin America provides market size and growth rate for the forecast period 2018-2023.
2. It offers comprehensive insights on current industry trends, trend forecast, and growth drivers about the data center cooling market in Latin America.
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 of the data center cooling market in Latin America.
5. The report offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

REPORT SNAPSHOT

According to the latest industry analysis by Arizton, thedata center cooling market in Latin America size is expected to reach around $255 million by 2023, growing at an impressive CAGR of more than 11% 2017–2023. The market research report provides in-depth market analysis and segmental analysis of the data center cooling market in Latin America by cooling infrastructure, cooling technique, cooling systems, tier standards, and geography.

Base Year: 2017

Forecast Year: 2018–2023

The study considers the present scenario of the data center cooling market in Latin America and its market dynamics for the period 2018?2023. The study covers a detailed overview of various market growth enablers, restraints, and trends. It covers both the demand and supply sides of the market. The study also profiles and analyzes the leading companies and other prominent companies operating in the market.

Major Vendors in the Market

Rittal

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