

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

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

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 CAGR 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

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

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, the data 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

Overview

Product Offerings

Key News

Schneider Electric

STULZ

Trane (Ingersoll Rand)

Vertiv

Prominent Players in the Market

AIRSYS

Product Offerings

Alfa Laval

Daikin Applied (Daikin Industries)

Geist Global

Munters

Nortek Humidity (Condair Group)

Pentair

Market Segmentation by Cooling Infrastructure

Cooling System

Other Infrastructure

Market Segmentation by Cooling Technique

Air-based Cooling

Water-based Cooling

Market Segmentation by Cooling Systems

CRAC & CARH

Chiller

Cooling Towers & Dry Coolers

Economizers & Evaporative Coolers

Market Segmentation by Geography

Brazil

Colombia

Chile

Rest of Latin America

Contents

1 RESEARCH METHODOLOGY

2 RESEARCH OBJECTIVES

3 RESEARCH PROCESS

4 REPORT COVERAGE

4.1 Market Definition

4.2 Base Year

4.3 Scope of Study

4.3.1 Market Segmentation by Cooling Systems

4.3.2 Market Segmentation by Other Infrastructure

4.3.3 Market Segmentation by Cooling Technique

4.3.4 Market Segmentation by Geography

5 REPORT ASSUMPTIONS & CAVEATS

5.1 Key Caveats

5.2 Inclusions

5.3 Currency Conversion

5.4 Market Derivation

6 MARKET AT A GLANCE

7 INTRODUCTION

7.1 Market Overview

7.2 Rack Power Density

7.3 Data Center Standards Related to Cooling

8 MARKET DYNAMICS

8.1 Market Growth Enablers

8.1.1 Demand for Colocation, Cloud, and Managed Service Providers

8.1.2 Increased Adoption of Energy-efficient Cooling Solutions

8.1.3 Increased Interest for Modular Data Center Deployment

- 8.1.4 YOY Impact of Market Growth Enablers
- 8.2 Market Growth Restraint
 - 8.2.1 Lack of Expertise
 - 8.2.2 Cost of Data Center Cooling Infrastructure
 - 8.2.3 Water Shortage Limits Data Center Operations
 - 8.2.4 YOY Impact of Market Growth Restraints
- 8.3 Market Opportunities & Trends
 - 8.3.1 Increase in Adoption of DCIM Solutions
 - 8.3.2 Migration from Comfort Cooling to Precision Cooling
 - 8.3.3 Availability of Free Cooling in Data Centers
 - 8.3.4 YOY Impact of Market Opportunities & Trends

9 DATA CENTER MARKET IN LATIN AMERICA

- 9.1 Market Overview
- 9.2 Market Size & Forecast 2017–2023
- 9.3 Porter's Five Forces Analysis
 - 9.3.1 Threat of New Entrants
 - 9.3.2 Bargaining Power of Suppliers
 - 9.3.3 Bargaining Power of Buyers
 - 9.3.4 Threat of Substitutes
 - 9.3.5 Competitive Rivalry

10 MARKET BY INFRASTRUCTURE

- 10.1 Cooling Systems
 - 10.1.1 Market Size & Forecast
- 10.2 Other Infrastructure
 - 10.2.1 Market Size & Forecast

11 MARKET BY COOLING TECHNIQUES

- 11.1 Air-based Cooling Techniques
 - 11.1.1 Market Size & Forecast
- 11.2 Water-based Cooling Techniques
 - 11.2.1 Market Size & Forecast

12 MARKET BY COOLING SYSTEMS

- 12.1 CRAC and CRAH Units
 - 12.1.1 Market Overview
 - 12.1.2 Market Size & Forecast
- 12.2 Chiller Units
 - 12.2.1 Market Overview
 - 12.2.2 Market Size & Forecast
- 12.3 Cooling Tower and Dry Coolers
 - 12.3.1 Market Overview
 - 12.3.2 Market Size & Forecast
- 12.4 Economizers and Evaporative Coolers
 - 12.4.1 Market Overview
 - 12.4.2 Market Size & Forecast
- 12.5 Other Cooling Units
 - 12.5.1 Market Overview
 - 12.5.2 Market Size & Forecast

13 COUNTRY SEGMENTATION

14 MARKET BY BRAZIL

- 14.1 Market Overview
- 14.2 Market Size & Forecast
- 14.3 Cooling Systems
 - 14.3.1 Market Size & Forecast
- 14.4 Cooling Systems by Type
 - 14.4.1 CRAC and CRAH Units: Market Size & Forecast
 - 14.4.2 Chiller Units: Market Size & Forecast
 - 14.4.3 Cooling Tower and Dry Coolers: Market Size & Forecast
 - 14.4.4 Economizers and Evaporative Coolers: Market Size & Forecast
 - 14.4.5 Other Cooling Units: Market Size & Forecast
- 14.5 Other Infrastructure
 - 14.5.1 Market Size & Forecast
- 14.6 Market by Cooling Techniques
 - 14.6.1 Air-based Cooling Techniques: Market Size & Forecast
 - 14.6.2 Water-based Cooling Technique: Market Size & Forecast

15 COLOMBIA: DATA CENTER MARKET

- 15.1 Market Overview

15.2 Market Size & Forecast

15.3 Cooling Systems

15.3.1 Market Size & Forecast

15.4 Cooling Systems by Type

15.4.1 CRAC and CRAH Units: Market Size & Forecast

15.4.2 Chiller Units: Market Size & Forecast

15.4.3 Cooling Towers and Dry Coolers: Market Size & Forecast

15.4.4 Economizers and Evaporative Coolers: Market Size & Forecast

15.4.5 Other Cooling Units: Market Size & Forecast

15.5 Other Infrastructure

15.5.1 Market Size & Forecast

15.6 Market by Cooling Technique

15.6.1 Air-based Cooling Techniques: Market Size & Forecast

15.6.2 Water-based Cooling Techniques: Market Size & Forecast

16 CHILE: DATA CENTER MARKET

16.1 Market Overview

16.2 Market Size & Forecast

16.3 Cooling Systems

16.3.1 Market Size & Forecast

16.4 Cooling Systems by Type

16.4.1 CRAC and CRAH Units: Market Size & Forecast

16.4.2 Chiller Units: Market Size & Forecast

16.4.3 Cooling Towers and Dry Coolers: Market Size & Forecast

16.4.4 Economizers and Evaporative Coolers: Market Size & Forecast

16.4.5 Other Cooling Units: Market Size & Forecast

16.5 Other Infrastructure

16.5.1 Market Size & Forecast

16.6 Market by Cooling Techniques

16.6.1 Air-based Cooling Techniques: Market Size & Forecast

16.6.2 Water-based Cooling Technique: Market Size & Forecast

17 REST OF LATIN AMERICA: DATA CENTER MARKET

17.1 Market Overview

17.2 Market Size & Forecast

17.3 Cooling Systems

17.3.1 Market Size & Forecast

17.4 Cooling Systems by Type

17.4.1 CRAC and CRAH Units: Market Size & Forecast

17.4.2 Chiller Units: Market Size & Forecast

17.4.3 Cooling Towers and Dry Coolers: Market Size & Forecast

17.4.4 Economizers and Evaporative Coolers: Market Size & Forecast

17.4.5 Other Cooling Units: Market Size & Forecast

17.5 Other Infrastructure

17.5.1 Market Size & Forecast

17.6 Market by Cooling Techniques

17.6.1 Air-based Cooling Techniques: Market Size & Forecast

17.6.2 Water-based Cooling Techniques: Market Size & Forecast

18 COMPETITIVE LANDSCAPE

19 KEY VENDORS

19.1 Rittal

19.1.1 Product Offerings

19.2 Schneider Electric

19.2.1 Overview

19.2.2 Product Offerings

19.2.3 Key News

19.3 Stulz

19.3.1 Product Offerings

19.3.2 Key News

19.4 Trane (Ingersoll Rand)

19.4.1 Product Offerings

19.4.2 Key News

19.5 Vertiv

19.5.1 Overview

19.5.2 Product Offerings

19.5.3 Key News

20 OTHER PROMINENT VENDORS

20.1 Airsys

20.1.1 Product Offerings

20.2 Alfa Laval

20.2.1 Product Offerings

20.3 Daikin Applied (Daikin Industries)

20.3.1 Product Offerings

20.4 Geist Global

20.4.1 Product Offerings

20.5 Munters

20.5.1 Product Offerings

20.6 Nortek Humidity (Condair Group)

20.6.1 Product Offerings

20.7 Pentair

20.7.1 Product Offerings

21 REPORT SUMMARY

21.1 Key Takeaways

21.2 Strategic Recommendations

21.3 Qualitative Summary

21.4 Quantitative Summary

21.4.1 Market by Infrastructure

21.4.2 Market by Cooling Systems

21.4.3 Market by Cooling Technique

21.4.4 Market by Country

21.4.5 Market in Brazil

21.4.6 Market in Colombia

21.4.7 Market in Chile

21.4.8 Market in Rest of Latin America

22 APPENDIX

22.1 List of Abbreviations

List Of Exhibits

LIST OF EXHIBITS

- Exhibit 1 Segmentation of Data Center Cooling Market in Latin America
- Exhibit 2 Market Size Calculation Approach 2017
- Exhibit 3 Rack Power Density in Data Center Market in Latin America (2010–2023)
- Exhibit 4 Data Center Cooling Market in Latin America 2017–2023 (\$ million)
- Exhibit 5 Five Forces Analysis 2017
- Exhibit 6 Data Center Cooling Market in Latin America by Cooling Systems 2017–2023 (\$ million)
- Exhibit 7 Data Center Cooling Market in Latin America by Other Infrastructure 2017–2023 (\$ million)
- Exhibit 8 Data Center Cooling Market in Latin America by Air-based Cooling Techniques 2017–2023 (\$ million)
- Exhibit 9 Data Center Cooling Market in Latin America by Water-based Cooling Techniques 2017–2023 (\$ million)
- Exhibit 10 Data Center Cooling Systems Market in Latin America by CRAC and CRAH Units 2017–2023 (\$ million)
- Exhibit 11 Data Center Cooling Systems Market in Latin America by Chiller Units 2017–2023 (\$ million)
- Exhibit 12 Data Center Cooling Systems Market in Latin America by Cooling Towers and Dry Coolers 2017–2023 (\$ million)
- Exhibit 13 Data Center Cooling Systems Market in Latin America by Economizers and Evaporative Coolers 2017–2023 (\$ million)
- Exhibit 14 Data Center Cooling Market in Latin America by Other Cooling Units 2017–2023 (\$ million)
- Exhibit 15 Data Center Cooling Market in Brazil 2017–2023 (\$ million)
- Exhibit 16 Data Center Cooling Market in Brazil by Cooling Systems 2017–2023 (\$ million)
- Exhibit 17 Data Center Cooling Market in Brazil by CRAC and CRAH Units 2017–2023 (\$ million)
- Exhibit 18 Data Center Cooling Market in Brazil by Chiller Units 2017–2023 (\$ million)
- Exhibit 19 Data Center Cooling Market in Brazil by Cooling by Tower and Dry Coolers 2017–2023 (\$ million)
- Exhibit 20 Data Center Cooling Market in Brazil by Economizers and Evaporative Coolers 2017–2023 (\$ million)
- Exhibit 21 Data Center Market in Brazil by Other Cooling Units 2017–2023 (\$ million)
- Exhibit 22 Data Center Cooling Market in Brazil by Other Infrastructure 2017–2023 (\$ million)

million)

Exhibit 23 Data Center Cooling Market in Brazil by Air-based Cooling Techniques 2017–2023 (\$ million)

Exhibit 24 Data Center Market in Brazil by Water-based Cooling Techniques 2017–2023 (\$ million)

Exhibit 25 Data Center Cooling Market in Colombia 2017–2023 (\$ million)

Exhibit 26 Data Center Cooling Market in Colombia by Cooling Systems 2017–2023 (\$ million)

Exhibit 27 Data Center Cooling Market in Colombia by CRAC and CRAH Units 2017–2023 (\$ million)

Exhibit 28 Data Center Cooling Market in Colombia by Chiller Units 2017–2023 (\$ million)

Exhibit 29 Data Center Cooling Market in Colombia by Cooling Towers and Dry Coolers 2017–2023 (\$ million)

Exhibit 30 Data Center Cooling Market in Colombia by Economizers and Evaporative Cooling Units 2017–2023 (\$ million)

Exhibit 31 Data Center Market in Colombia by Other Cooling Units 2017–2023 (\$ million)

Exhibit 32 Data Center Cooling Market in Colombia by Other Infrastructure 2017–2023 (\$ million)

Exhibit 33 Data Center Cooling Market in Colombia by Air-based Cooling Techniques 2017–2023 (\$ million)

Exhibit 34 Data Center Market in Colombia by Water-based Cooling Techniques 2017–2023 (\$ million)

Exhibit 35 Data Center Cooling Market in Chile 2017–2023 (\$ million)

Exhibit 36 Data Center Cooling Market in Chile by Cooling Systems 2017–2023 (\$ million)

Exhibit 37 Data Center Cooling Market in Chile by CRAC and CRAH Units 2017–2023 (\$ million)

Exhibit 38 Data Center Cooling Market in Chile by Chiller Units 2017–2023 (\$ million)

Exhibit 39 Data Center Cooling Market in Chile by Cooling Towers and Dry Coolers 2017–2023 (\$ million)

Exhibit 40 Data Center Cooling Market in Chile by Economizers and Evaporative Cooling Units 2017–2023 (\$ million)

Exhibit 41 Data Center Market in Chile by Other Cooling Units 2017–2023 (\$ million)

Exhibit 42 Data Center Cooling Market in Chile by Other Infrastructure 2017–2023 (\$ million)

Exhibit 43 Data Center Cooling Market in Chile by Air-based Cooling Techniques 2017–2023 (\$ million)

Exhibit 44 Data Center Market in Chile by Water-based Cooling Techniques 2017–2023 (\$ million)

Exhibit 45 Data Center Cooling Market in Rest of Latin America 2017–2023 (\$ million)

Exhibit 46 Data Center Cooling Market in Rest of Latin America by Cooling Systems 2017–2023 (\$ million)

Exhibit 47 Data Center Cooling Market in Rest of Latin America by CRAC and CRAH Units 2017–2023 (\$ million)

Exhibit 48 Data Center Cooling Market in Rest of Latin America by Chiller Units 2017–2023 (\$ million)

Exhibit 49 Data Center Cooling Market in Rest of Latin America by Cooling Towers and Dry Coolers by 2017–2023 (\$ million)

Exhibit 50 Data Center Cooling Market in Rest of Latin America by Economizers and Evaporative Cooling Units 2017–2023 (\$ million)

Exhibit 51 Data Center Market in Rest of Latin America by Other Cooling Units 2017–2023 (\$ million)

Exhibit 52 Data Center Cooling Market in Rest of Latin America by Other Infrastructure 2017–2023 (\$ million)

Exhibit 53 Data Center Cooling Market in Rest of Latin America by Air-based Cooling Techniques 2017–2023 (\$ million)

Exhibit 54 Data Center Market in Rest of Latin America by Water-based Cooling Techniques 2017–2023 (\$ million)

List Of Tables

LIST OF TABLES

Table 1 Key Geographies Definition

Table 2 Key Caveats

Table 3 Currency Conversion 2013?2017

Table 4 YOY Impact of Market Growth Enablers 2017?2023

Table 5 YOY Impact of Market Growth Restraints 2017?2023

Table 6 YOY Impact of Market Opportunities & Trends 2017?2023

Table 7 Qualitative Summary of Data Center Cooling Market in Latin America

Table 8 Quantitative Summary of Data Center Cooling Market in Latin America by Infrastructure 2017–2023 (\$ million)

Table 9 Quantitative Summary of Data Center Cooling Market in Latin America by Cooling Systems 2017–2023 (\$ million)

Table 10 Quantitative Summary of Data Center Cooling Market in Latin America by Cooling Technique 2017–2023 (\$ million)

Table 11 Quantitative Summary of Data Center Cooling Market in Latin America by Country 2017–2023 (\$ million)

Table 12 Quantitative Summary of Data Center Cooling Market in Brazil 2017–2023 (\$ million)

Table 13 Quantitative Summary of Data Center Cooling Market in Colombia 2017–2023 (\$ million)

Table 14 Quantitative Summary of Data Center Cooling Market in Chile 2017–2023 (\$ million)

Table 15 Quantitative Summary of Data Center Cooling Market in Rest of Latin America 2017–2023 (\$ million)

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