

Data Center Market in Latin America - Industry Outlook and Forecast 2021-2026

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Abstracts

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

The Latin America data center market by investment is expected to grow at a CAGR of 7.6% during 2021–2026.

The data center market in Latin America is observing an increased investment in modular, containerized, and POD data center deployment. While most facilities in the region are greenfield construction types, the development of modular data centers is growing steadily, thereby contributing to the Latin America data center market growth. Telecommunication suppliers are increasingly inclined to adopt modular models in Latin America. Modular infrastructure is energy-efficient and is designed to sustain high-rack density. The expenditure to run a modular information center is about 30% less than traditional brick-and-mortar facilities. Therefore, the demand for modular infrastructure is expected to increase during the forecast period.

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

Increase in Automation & Artificial Intelligence solutions in Data Centers

Growth in Rack Power Density

Adoption of Cloud & Big Data Drives the Data Center Market

Growth in Modular Data Center Deployment

The study considers the present scenario of the Latin America data center market and its market dynamics for 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Latin America Data Center Market Segmentation

The Latin America Data Center Market research report includes a detailed segmentation by IT infrastructure, electrical infrastructure, mechanical infrastructure, cooling technique, cooling systems, general construction, tier standards, geography. The server infrastructure market in Latin America has witnessed strong growth in the last few years. ODM servers' procurement by hyperscale data center facilities and other enterprises is expected to grow over the next 2–3 years. Server systems based on x86 architecture servers are the most popular systems among enterprises and managed hosting service providers. Most modern operators adopt server infrastructure that matches their workload requirements.

The adoption of static VRLA batteries-based UPS systems designed with up to 750 kVA capacity with N+1 redundant configuration is growing in Chile. Most facilities are equipped with up to 500 kVA VRLA batteries-based UPS systems with N+1 redundant configuration in Colombia. The market is likely to observe the adoption of diesel generators and transfer switches and switchgears with minimum N+N redundancy across data centers. The demand for monitored and metered PDUs is expected to grow during the forecast period due to the need to reduce OPEX across data centers. Several facilities in Mexico are furnished with up to 1000 kVA UPS systems. Large operators are likely to procure over 1,000 kVA UPS systems. The market will witness the adoption of diesel generators with minimum N+N redundancy across data centers.

Majority of Brazil's facilities utilize water-based cooling systems, especially evaporative, that partially support free cooling. Large data centers in Brazil are expected to include CRAH units, whereas small facilities are likely to adopt CRAC units during the forecast period. There is also increased adoption of evaporative coolers that include partial cooling with indoor CRAC units in a few Latin American countries. Some facility operators use a combination of CRAH and direct expansion cooling techniques. In Chile, data centers use chilled water-cooling systems and air-based cooling systems with CRAH units, free cooling units with CRAC units, or free cooling chillers.

The Latin America market is likely to witness an increase in the construction of greenfield projects. Modular construction is expected to add significant investments to the market during the forecast period. Construction contractors in Chile are generally developing greenfield and modular data centers. In terms of physical security, the adoption of security cameras and access control systems for 24x7 monitoring is growing across the region. The use of infrastructure-based monitoring solutions is also high in the market; however, integrated facility monitoring is expected to grow during the forecast period.

45 out of 185 Tier III certified facilities in Latin America are in Brazil. Most data centers are built with a minimum of N+1 redundancy in power infrastructure that are Tier III standards. Ascenty, Axtel, ODATA, Equinix, Angola Cables, CenturyLink, GTD Group, Telefonica, and KIO Networks are major Uptime Institute certified data center operators. Several data centers built in recent times are of Tier III standards due to an increased need for redundant components to at least support critical applications in data centers. Tier IV facilities are witnessed in Brazil, Chile, Colombia, Ecuador, Mexico, Uruguay, Costa Rica, Guatemala, and the Dominican Republic.

By IT Infrastructure

Servers

Storage

Network

By Electrical Infrastructure

UPS Systems

Generators

Transfer Switches and Switchgears

PDU's

Other Electrical Infrastructures

By Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

Chiller Units

Cooling Towers, Dry Coolers, & Condensers

Economizers & Evaporative Coolers

Other Cooling Units

Racks

Others Mechanical Infrastructure

Pump Systems

Ducts

Piping Units and Valves

Boilers

Fire Protection

Suppression Systems

Sprinklers

By Cooling Technique

Air-based Cooling Technique

Liquid-based Cooling Technique

By General Construction

Core and Shell Development

Installation and Commissioning Services

Engineering and Building Designs

Physical Security

DCIM/BMS

By Tier Standards

Tier I & II

Tier III

Tier IV

INSIGHTS BY GEOGRAPHY

Brazil is expected to observe the highest investments in the Latin America data center market. With the increasing internet penetration among consumers and the growing cloud-based services by businesses in the region, data centers' demand is growing significantly, which can be identified through continued investment in data center operations. Similarly, the growing demand for cloud-based services, the Internet of Things (IoT), and big data analytics in Chile has increased data center investments in recent years. In Chile, the high usage of social media platforms such as Facebook, Instagram, Twitter, and Snapchat will increase data generation and increase the need for storage.

By Geography

Latin America

Brazil

Chile

Colombia

Mexico

Other Latin America Countries

INSIGHTS BY VENDORS

The Latin America data center market is observing an influx of IT and support infrastructure providers along with investors and construction contractors. Innovations in IT and support infrastructure are expected to increase vendors' market share in Brazil, Chile, Colombia, and Mexico due to the increased construction of mega data centers. Vendors are also partnering with modular data center developers to grow revenue, and this trend is expected to grow during the forecast period. The market is likely to witness the entry of new entrants that provide modular data center solutions, DCIM solutions, installation and commissioning services, and physical security services.

Prominent Data Center Critical (IT) Infrastructure Providers

Arista

Broadcom

Cisco

Dell Technologies

Hewlett Packard Enterprise (HPE)

Huawei

IBM

Juniper

Lenovo

NetApp

Oracle

Pure Storage

Prominent Data Center Support Infrastructure Providers

ABB

Active Power (Piller Power Systems)

Alfa Laval

Assa Abloy

Axis Communications

Bosch Security Systems (Robert Bosch)

Caterpillar

Cummins

Daikin Applied (Daikin Industries)

Delta Group

Eaton

Generac Power System

Honeywell International

Legrand

Mitsubishi Electric Corporation

Munters

Panduit

Rittal

Rolls Royce (KINOLT (EURO-DIESEL))

Schneider Electric

STULZ

Siemens

Vertiv

Prominent Data Center Construction Contractors

AECOM

Aceco TI

Constructora Sudamericana

Fluor Corporation

Holder Construction

Jacobs Engineering Group

Mortenson Construction

ZFB Group

Prominent Data Center Investors

Ascenty (DIGITAL REALTY & BROOKFIELD INFRASTRUCTURE)

Bitglass

Etix Everywhere

Equinix

HostDime

ODATA

Scala Data Centers

Tigo (Millicom)

KEY QUESTIONS ANSWERED

1. What is the value of the Latin American data center market during the period 2021-2026?
2. What key factors and market trends are anticipated to drive the Latin America data center market growth?
3. How have technological advancements such as automation and AIs enabled the data center market growth?
4. What are significant market opportunities and threats faced by vendors in the data center market?
5. Who are the key players in the Latin America data center market?
6. What is the impact of COVID-19 on the Latin America data center market share?

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