

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

<https://marketpublishers.com/r/DFDD6A656CDEN.html>

Date: September 2018

Pages: 134

Price: US\$ 3,500.00 (Single User License)

ID: DFDD6A656CDEN

Abstracts

This market research report on data center power 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 type (UPS systems, generators, transfer switches & switchgear, rack PDU, and other electrical infrastructure) and by geography (Brazil, Colombia, Chile, and rest of Latin America).

Data Center Power Market in Latin America - Overview

The growing number of greenfield and modular data center development projects is fueling the growth of the data center power market in Latin America. The growing investment is strengthening fiber connectivity, and reliability in power supply along with the growing demand from data center services across various industries such as BFSI, IT, and healthcare are the factors augmenting the development of data center facilities in the Latin American market. The growing adoption of power infrastructures such as UPS, generators, PDUs, and switchgear of N+N redundancy among facilities will fuel the demand for power infrastructure in Latin American market. The major investments for new facilities across Latin America are primarily by telecommunication giants such as Entel, Telefonica (Vivo), Americatel, Telecarrier, and América Móvil. The government agencies are investing million dollars to improve the network connectivity through submarine cables connecting Latin America with the US, Europe, and APAC markets. Leading colocation providers such as Ascenty, Entel, Equinix, ODATA, Angola Cable, TigoUne, and Axtel are the major investors in the Latin American data center market.

Brazil, Chile, Colombia, Mexico, Argentina, and Peru are the major contributors in the Latin American market. The exponential growth of cloud computing and increase in demand for cloud connectivity services for cloud platforms such as AWS, Microsoft,

Google, Oracle, and IBM will transform the data center market in Latin America. The data center power market in Latin America is projected to generate revenues of around \$490 million by 2023 and is anticipated to grow at a CAGR of close to 12% during the forecast period.

Data Center Power Market in Latin America - Dynamics

The data center power market in Latin America is growing due to continued investments from local and global service providers. However, several data centers are facing issues with power reliability. This issue of redundancy has led many operators to focus on improving redundancies across all power infrastructure in data centers facilities in Latin America. The rapid deployment of modular data centers will also boost the market for modular infrastructure solutions in the data center market in Latin America. Growing tax incentives offering from local government will aid in reducing the cost of procurement of power infrastructure solutions across Latin America. The use of lithium-ion battery and fuel cells to power data centers in Latin America is expected to emerge as a trend during the forecast period. Fuel cells will help operators to overcome power reliability and reduce dependence on local utility in the Latin American market.

Data Center Power Market in Latin America - Segmentation

This market research report includes a detailed segmentation of the market by type and by geography.

Data Center Power Market in Latin America – By Type

Adoption of N+N or 2N redundant infrastructure will continue to grow in the data center market in Latin America

The data center power market in Latin America by type is segmented into UPS systems, generators, transfer switches & switchgear, rack PDU, and other electrical infrastructure. Generators dominated the data center power market size in Latin America in 2017 and are projected to grow at a CAGR of more than 12% during the forecast period. The different types of generators available in the Latin American market are diesel generators, natural gas or liquid propane generators, and bi-fuel generators. The increasing adoption of N+N generators and the introduction of generators with 2N redundancy specifically for Tier 3 and Tier 4 data centers in Latin America will boost the demand for these power systems in the region. These innovative power infrastructures offer interrupted power supply during power outages and areas that are highly

susceptible to natural disasters. The emergence of diesel rotary uninterruptible power supply (DRUPS) systems that combines both battery and flywheel UPS topology and a diesel generator will revolutionize the data center power market in Latin America.

Data Center Power Market in Latin America – By Geography

Million-dollar investments by colocation, telecommunication, and cloud services providers to boost revenues in Brazil, Mexico, Chile, and Colombia data center market

The geographical segmentation of the data center power market in Latin America is classified as Brazil, Colombia, Chile, and rest of Latin America. Brazil dominated the data center power market size in Latin America in 2017 and is estimated to grow at a CAGR of approximately 10% during the forecast period. The increasing investments by colocation service providers are propelling the growth of the Brazilian market in Latin America. Equinix and Ascenty contribute around 90% of the revenues in the data center market in Brazil. The development of modern data center built on tier 3 standards with a minimum of N+1 redundancy in the power infrastructure will create new opportunities leading vendors in the Latin American data center market. The prominent operators are deploying 2N redundant power infrastructure that in turn, will revolutionize the data center market in Latin America. Moreover, the increased investment in strengthening grid supply of Latin American countries is expected to revolutionize the market in the region.

Key Vendor Analysis

The data center power market in Latin America is a growing market for vendors involved in offering innovative products that help increase operational efficiency in the facilities across the region. The presence of various international and regional players is intensifying the level of competition in the Latin American market. The emergence of lithium-ion batteries, fuel cells, and DRUPS will enable companies to gain a larger market share and attract more consumers in the Latin American market. The key vendors are also focusing on integrating DCIM solutions with the existing and new facilities to reduce OPEX charges and lower power consumption levels. The demand for modular data centers with high rack density will increase partnerships among data center operators, local resellers and skilled local technicians in the Latin American market.

The major vendors in the market are:

ABB

Eaton

General Electric

Schneider Electric

Vertiv

Other prominent vendors include Active Power (Piller Power Systems), Rittal, Caterpillar, Cummins, Cyber Power Systems, Delta Group, Generac Power Systems, Legrand, Mitsubishi Electric Corporation, Toshiba, and Tripp Lite.

Key market insights include

1. The analysis of data center power 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 power 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 for data center power 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 power market in Latin America size is expected to reach values of around \$490 million by 2023, growing at an impressive CAGR of approximately 12% 2018–2023. The market research report provides in-depth market analysis and segmental analysis of the data center power market in Latin America by type, and geography.

The data center power market in Latin America is driven by the penetration of internet services and growing need for network connectivity. The growing demand for cloud-based services across the Latin American market will create lucrative opportunities for

data center operators in the Latin American market.

Base Year: 2017

Forecast Year: 2018–2023

The report considers 2017 as the base year. All calculations involving quantitative data are based on the year 2017. The values represented in the report are actual values for 2017, whereas, the values are estimated for the 2018–2023 period.

Major Vendors in the Data Center Power Market in Latin America

ABB

Overview

Product Offerings

Key News

Eaton

General Electric

Schneider Electric

Vertiv

Prominent Players in the Data Center Power Market in Latin America

Active Power (Piller Power Systems)

Product Offerings

Rittal

Caterpillar

Cummins

Cyber Power Systems

Delta Group

Generac Power Systems

Legrand

Mitsubishi Electric Corporation

Toshiba

Tripp Lite

Market Segmentation by Type

UPS systems

Generators

Transfer Switch and Switchgear

Rack PDU

Other Electrical Infrastructure

Market Segmentation by Geography

Brazil

Colombia

Chile

Rest of Latin America

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