

Brazil Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Brazil Data Center Market size is estimated at 0.74 thousand MW in 2024, and is expected to reach 1.21 thousand MW by 2029, growing at a CAGR of 10.17%. Further, the market is expected to generate colocation revenue of USD 2,074.7 Million in 2024 and is projected to reach USD 3,503.7 Million by 2029, growing at a CAGR of 11.05% during the forecast period (2024-2029).

Tier 3 data centers accounts for majority market share in 2023, Tier-4 is the fastest growing in forecasted period

The tier 3 data centers' capacity reached 383.3 MW in 2022 and is further projected to register a CAGR of 7.91%, surpassing 699.9 MW by 2029. On the other hand, the tier 4 data center segment is predicted to grow and register a CAGR of 22.12% to reach a capacity of 470 MW by 2029.

Facilities in tier 1 & 2 are expected to gradually lose their demand and display a decrease in growth in the upcoming years. Tier 1 & 2 facilities are expected to hold a market share of nearly 22.5% by 2029 with minimal growth. This is a result of the prolonged and inconsistent outages. Most users will eventually switch to tier 3 and 4 facilities, holding 36% and 41.5% of market shares, respectively, owing to the increased demand for storing, processing, and analyzing data.

The BFSI sector of the economy is expanding. The Brazilian Central Bank encourages initiatives to increase the adoption level of open banking. Therefore, e-banking and e-commerce opportunities are increasing in the market. For instance, investment in

Brazilian fintech companies increased from USD 546 million in 2018 to USD 1200 million in 2021. The above instances guarantee the growth of data centers in the Brazilian market. This necessitates the construction of wholesale and hyperscale facilities, which have tier 3 and 4 requirements and are driven by the rising demand for e-banking and online transactions.

Additionally, tier 4 data centers are expected to expand significantly in the future. This is because more businesses are providing cloud-based services, which has caused more companies to construct facilities to provide colocation space with the best technology.

Brazil Data Center Market Trends

Increasing consumption of data by multiple end users. Such as e-commerce, and rising mobile connections drives the market growth

The total data traffic per smartphone in the country was 5.3 GB in 2022, which is expected to register a CAGR of 16.3% during the forecast period to reach 17.1 GB by 2029.

In Brazil, the average mobile-connected laptop was anticipated to generate 11.2 GB of mobile data traffic per month by 2022, up from 4.3 gigabytes per month in 2017.

The consumption of data by multiple end users motivates this trend. For instance, e-commerce in Brazil grew by 12% in 2018 compared to 2017, closing the year with a revenue of USD 15 billion. This was the first time the industry registered double-digit growth since 2015. Brazil shows signs of overcoming its 2014-2016 economic downturn with positive projected growth for e-commerce at 15%. E-commerce is expected to generate USD 16.8 billion (BRL 61.2 billion) in 2019. In Brazil, 58 million consumers made at least one virtual purchase in 2018, representing 27% of the country's population and an increase of 6% compared to 2017, making e-commerce a viable sales channel worth exploring. The needs of the end users are changing, and the demand for more data storage is resulting in the addition of more servers in data centers, contributing to the growth of the data center market in Brazil.

The high internet and smartphone technology adoption by various businesses and

growing digital usage across the nation drives the market demand

The total number of smartphone users in the country was 143.43 million in 2022, which is expected to register a CAGR of 3.5% during the forecast period to reach 185.2 million by 2029.

Digital usage is expanding rapidly in Brazil. The quick internet and smartphone technology adoption in various businesses has impacted consumer behavior. For instance, the per capita purchasing power per person in Brazil increased from 2.94 trillion in 2016 to 3.44 trillion in 2021. As a result, more people can purchase smartphones, leading to a growing number of smartphone users.

The internet penetration of the country increased from 73% in 2017 to 88% in 2022, while the number of internet users increased from 154 million in 2017 to 191 million in 2022. Owing to such extensive use, digital payment services were promoted, and their application increased due to the COVID-19 pandemic. Consequently, there are more smartphone users in Brazil. Smartphones accounted for 13% of IP traffic in 2017 and reached 39% of IP traffic in 2022. Thus, the rising use of smartphones in the Brazilian market results in a constant increase in data, necessitating a growing amount of storage space to accommodate this uncontrollable flow of data with the need for real-time processing and analysis. Data centers must manage the sheer amount of data. Thus, the requirement for extra racks in data centers in Brazil may increase as the number of smartphone users rises.

Brazil Data Center Industry Overview

The Brazil Data Center Market is moderately consolidated, with the top five companies occupying 42.13%. The major players in this market are Ascenty (Digital Realty Trust Inc.), HostDime Global Corp., Lumen Technologies Inc., ODATA (Patria Investments Ltd) and Terremark (Verizon) (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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