

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

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## Abstracts

The Chile Data Center Cooling Market size is estimated at USD 38.5 million in 2024, and is expected to reach USD 83.60 million by 2030, growing at a CAGR of 12.5% during the forecast period (2024-2030).

### Key Highlights

The increasing demand for cloud computing among SMEs, government regulations for local data security, and growing investment by domestic players are some major factors driving the demand for data centers.

**Under Construction IT Load Capacity:** The upcoming IT load capacity of the Chilean data center market is expected to reach more than 480.9 MW by 2029.

**Under Construction Raised Floor Space:** The country's construction of raised floor areas is expected to exceed 2.4 million sq. ft by 2029.

**Planned Racks:** The country's total number of racks to be installed is expected to reach 120,224 units by 2029. Santiago is expected to house the maximum number of racks by 2029.

**DC Facilities:** There are 44 colocation data center facilities in Chile, and Santiago is the country's major hotspot. The increasing adoption of the cloud by most businesses is one factor boosting the number of data centers in the nation.

New data centers across the country are focusing on implementing state-of-the-art

monitoring systems to mitigate the risks associated with extreme weather events. Many would use the latest, more energy-efficient cooling technologies, such as redundant cooling systems, smart monitoring technologies, and backup power generators, to ensure consistency of temperature in the event of power interruptions. Another example is direct liquid cooling, which uses a higher thermal transfer of water to a more efficient cooling device.

The average winter temperature is between 14 °C (57 °F) and 22 °C (72 °F), and the average summer temperature is between 16 °C (61 °F) and over 28 °C (82 °F). Winters can vary widely across the country, with frequent cold, fog, and snow periods in the north and more pleasant weather in the south. Depending upon climatic conditions, DC cooling is done in the DC facilities.

### Chile Data Center Cooling Market Trends

#### IT and Telecom to Have Significant Market Share

The cloud segment was expected to reach 35.54 MW in 2023 and is further projected to exhibit a CAGR of 15.20%, surpassing 83.06 MW by 2029. Among end-user industries, the cloud industry is expected to contribute the largest market share and witness the fastest growth over the study period.

Cloud services are based on data centers, even though the cloud is the foundation of the digital revolution. Hence, the market for data centers is expanding as more companies move their operations to the cloud. The COVID-19 pandemic sparked a fresh wave of digital change in numerous industries nationwide.

Businesses increasingly rely on third-party colocation facilities to run their data centers, which is supplemented by a growing move toward a hybrid IT strategy that uses the synergistic benefits of hosted data centers and multi-cloud architectures. Users can easily access the cloud service due to the high-speed internet available at data centers that house the cloud servers. MNCs are preparing to penetrate Chile and contribute to data growth with their cloud-based services.

For instance, Amazon Web Services (AWS) plans to build a cloud area in Santiago, Chile. The business has a Cloudfront Edge site in Santiago and intends to open a local zone soon. While Microsoft is creating a cloud region in Chile, Oracle, Google, and other companies have already established Chilean cloud regions. Huawei is presently planning the third facility.

## Liquid Cooling to Record Significant Share

Liquid cooling offers many benefits in data centers, making it an attractive option for cooling computing environments with high performance. It has been shown to be more energy-efficient than conventional air conditioning. By providing precise temperature control, it reduces the need for overcooling and improves data center energy efficiency.

Technological advances have helped to reduce data centers' water consumption by more than 15% in tropical climates and 80% in green areas, making liquid cooling easier to maintain, scale up, or be affordable. Energy used for liquid cooling can be recycled to heat buildings and drinking water, while advanced artificial refrigerants can significantly reduce the carbon footprint of air conditioners.

Liquid cooling takes advantage of space constraints and superior heat transfer properties of water or other liquids to provide efficient and cost-effective cooling of high-density racks up to 3000 times more efficiently than air. Long proven in mainframe and gaming applications, liquid cooling is increasingly being used to protect rack servers in regional data centers. Recently, Vertiv introduced a water-efficient liquid cooling solution for high-density data centers, the Liebert XDU, a new generation of thermal management systems that supports liquid-cooled servers and enables the control of liquid quality, flow, and pressure.

Santiago is the major hotspot in the country, accounting for over 85% of the data centers. It is the most important industrial and financial center in Chile and the nation's most significant industrial and commercial hub. Santiago generates 45% of the country's revenue. Additionally, the city is one of the largest banking hubs in South America, alongside Buenos Aires and S?o Paulo.

Numerous foreign organizations, including ECLAC (Economic Commission for Latin America and the Caribbean), have offices in Santiago. The local tech sector has gained momentum as a result of these substantial arrivals. Santiago offers businesses a supportive environment and government assistance to foster rapid technological innovation. Chile's exceptional connectivity has benefited these large enterprises. The country's 5G technology and both continental and intercontinental fiber optics make the region more appealing for investment.

## Chile Data Center Cooling Industry Overview

The Chilean data center cooling market is fragmented as the benefits offered by the technology and support from the government by imposing efficiency regulations on data centers are expected to help the growth of the data center cooling market directly.

Market penetration is growing with a strong presence of major players such as Schneider Electric SE, Rittal GMBH & Co.KG, Mitsubishi Electric Hydronics & IT Cooling Systems SpA, Johnson Controls International PLC, and Asetek A/S.

In April 2024, Carrier Global Corporation partnered with Strategic Thermal Labs to develop direct-to-chip cooling technology. Under this partnership, Carrier will leverage the advancement in this technology and incorporate it into its data center cooling solutions.

In December 2023, Vertiv completed the acquisition of Cooltera Ltd, a manufacturer of coolant distribution units (CDU) and secondary fluid networks (SFN). This acquisition is expected to improve the existing DC cooling solutions offered by the company.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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