

# South & Central America Data Center Cooling Market Report (2021-2031) by Scope, Segmentation, Dynamics, and Competitive Analysis

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## Abstracts

The South & Central America data center cooling market is projected to grow significantly, reaching approximately US\$ 1,089.70 million by 2031, up from US\$ 417.88 million in 2023, with an estimated compound annual growth rate (CAGR) of 12.7% from 2023 to 2031.

## Executive Summary and Market Analysis

In July 2024, Elea Digital Data Centers, a prominent provider of digital infrastructure and colocation services in Brazil, announced a major expansion plan to address the increasing demand for data centers. This initiative involves a substantial investment of US\$ 1 billion aimed at adding 120MW of capacity in the Greater São Paulo area. This move reflects the broader trend of rising investments in data center infrastructure across South America, driven by the region's expanding digital economy and the growing need for advanced data processing and storage solutions. As South America undergoes rapid digital transformation, investments in data center infrastructure, particularly in efficient cooling technologies, are essential to support the evolving digital landscape.

## Market Segmentation Analysis

The South & Central America data center cooling market can be segmented based on several criteria:

1. Component: The market is divided into various components, including air conditioning

systems, chillers, air handling units, cooling towers, heat exchangers, humidifiers, and others. In 2023, air conditioning systems held the largest market share.

2. Cooling Type: The cooling solutions are categorized into room-based cooling, row-based cooling, and rack-based cooling, with room-based cooling dominating the market in 2023.

3. Data Center Type: The market is segmented into hyperscale data centers, colocation data centers, wholesale data centers, and enterprise data centers, where hyperscale data centers accounted for the largest share in 2023.

4. Industry Vertical: The market is also segmented by industry verticals, including IT and telecom, BFSI, healthcare, manufacturing, government and defense, media and entertainment, retail, energy, and others. The IT and telecom sector held the largest share in 2023.

## **Market Outlook**

Innovative technologies such as data center cooling robots are emerging to enhance monitoring capabilities within facilities. These robots can navigate the data center, monitoring temperature and humidity levels in specific server cabinets. As advanced cooling technologies often require significant investments, smart technology solutions have gained popularity. For instance, Google has successfully utilized its DeepMind AI to reduce cooling energy consumption by 40% over 18 months through smart temperature controls.

Additionally, companies like OneNeck IT Solutions have developed robotic sensor probes that fit into standard cabinets, allowing for automated temperature data collection and transmission via Bluetooth. This technology enables data center professionals to create detailed heat maps, facilitating better decision-making and maintenance strategies. In response to the increasing demand for automation in data center cooling, Microsoft announced in October 2023 the formation of a dedicated team to advance these technologies, highlighting the importance of innovative solutions in optimizing operational efficiency.

## **Country Insights**

The South & Central America data center cooling market includes key countries such as Brazil, Argentina, and others in the region. Brazil was the leading market in 2023. Notably, countries like Peru, Colombia, and Chile are also significant players in the data center cooling market. Governments in these nations are launching initiatives to construct new data centers, which is expected to further stimulate market growth. For example, Claro Peru announced a new US\$ 50 million data center in Lima in December 2023, while ODATA launched its second hyperscale data center in San Bernardo, Chile, in November 2023, expanding its IT capacity in the country.

## **Company Profiles**

Key players in the South & Central America data center cooling market include Asetek, Inc., Mitsubishi Corp, Stulz SpA, Vertiv Group Corp., Aspen Systems, LLC, Daikin Industries Ltd, Delta Electronics Inc, Danfoss AS, Motivair Corporation, Madison Industries, Fujitsu Ltd, Rittal GmbH & Co KG, Schneider Electric SE, Trane Technologies Plc, Black Box Corporation, Carrier Global Corp, Alfa Laval AB, Hewlett Packard Enterprise Development LP, Boyd Corp, and Evapco Inc, among others. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative solutions to their customers.

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