

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

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Abstracts

The hyperscale data center market in South and Central America was valued at approximately USD 1.31 billion in 2023 and is projected to grow to around USD 4.82 billion by 2031, reflecting a compound annual growth rate (CAGR) of 17.7% during this period.

Drivers of Market Growth

The rapid advancement of technologies such as the Internet of Things (IoT), big data, machine learning, and artificial intelligence (AI) is significantly driving the growth of the hyperscale data center market in the region. IoT, in particular, generates vast amounts of data that require efficient storage, processing, and real-time analysis. With the proliferation of IoT devices, which connect various physical objects for data collection and communication, there is a growing need for data centers that can operate at the network's edge. These edge data centers provide local computing power and analytics capabilities, which help minimize latency and bandwidth usage when sending data to centralized facilities. This setup not only supports real-time decision-making but also enhances IoT applications across diverse sectors.

Moreover, the processing and analysis of large datasets necessitate substantial computational power and storage. Hyperscale data centers are designed with scalable and distributed architectures that enable organizations to efficiently handle big data. They improve data processing efficiency and facilitate real-time analytics. Additionally, machine learning and AI applications require significant computational resources for both training and inference, which hyperscale data centers can provide. By situating these data centers closer to data sources, organizations can further reduce latency,

thereby supporting advanced applications such as autonomous vehicles, intelligent video analytics, predictive maintenance, and personalized recommendations.

Market Overview

Countries like Brazil and Argentina are emerging as key players in the hyperscale data center market due to their strategic locations, strong infrastructure, and supportive government policies. The market is witnessing robust growth driven by ongoing digital transformation and increasing internet penetration across the region. Investments in data center infrastructure are being fueled by both global technology giants and local enterprises looking to enhance their cloud services, data storage, and processing capabilities. For example, in May 2024, Equinix announced the opening of RJ3, its third data center in Rio de Janeiro, with an initial investment of USD 94 million. Such developments are indicative of the growing momentum in the hyperscale data center sector in South and Central America.

Market Segmentation

The hyperscale data center market in South and Central America can be segmented based on solutions, end users, industry verticals, and countries:

- 1. Solutions:** The market is divided into several categories, including storage, networking, servers, security, and others. In 2023, the storage segment held the largest share of the market.
- 2. End Users:** The market is segmented into colocation providers, enterprises, and cloud providers, with colocation providers leading the market share in 2023.
- 3. Industry Verticals:** The market is categorized into banking, financial services, and insurance (BFSI), telecommunications and IT, government and public sectors, media and entertainment, among others. The BFSI sector accounted for the largest market share in 2023.
- 4. Countries:** The market is further segmented into Brazil, Argentina, and the rest of South and Central America, with Brazil dominating the market share in 2023.

Key Players in the Market

Several prominent companies are active in the hyperscale data center market, including:

ABB Ltd

Dell Technologies Inc

EdgeConnex Inc.

Cisco Systems Inc

International Business Machines Corp (IBM)

Fujitsu Ltd

Hewlett Packard Enterprise Development LP

Intel Corp

Juniper Networks Inc

Schneider Electric SE

These companies are at the forefront of providing innovative solutions and infrastructure to support the growing demands of hyperscale data centers in South and Central America.

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