

Latin America Data Center Construction Market - Industry Outlook and Forecast 2022-2027

Market Report | 2022-06-20 | 298 pages | Arizton Advisory & Intelligence

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Report description:

The Latin America Data Center Construction market is expected to grow at a CAGR of 6.99% during 2022-2027

The following factors are likely to contribute to the Latin America data center construction market growth during the forecast period:

- Adoption of Cloud, IoT & Big Data
- Construction of Modular Data Centers
- Increased Deployment of Submarine Cables
- Thriving Digital Economy in Latin America
- Tax Incentives Enhancing Data Center Investments

Latin America Data Center Construction Market Opportunities

- Some of the major construction parameters and standards on which data centers in Latin America are built include Uptime Institute's Tier standards, LEED Certification, TIA 942, and ANSI/BICSI 002-2019 certifications
- There is an increase in the construction of data centers built to cater to increasing demand by hyperscale and cloud service providers such as Microsoft, Amazon Web Services, Google, IBM, Huawei, and Tencent, among others, which will also drive the market, especially for wholesale colocation
- Brazil is the market leader, contributing over 50% of the investment to Latin America, followed by other countries such as Mexico, Columbia, Chile, and Uruguay. Modular data center deployment is popular in other Latin American countries such as the Caribbean and Paraguay, among others
- Scala Data Centers, a hyperscale developer in Brazil, has created the region's Center of Excellence in Engineering (CoE). The CoE will manage the end-to-end design and construction process of data centers built by Scala Data Centers in Latin America, with a

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focus on energy and operational efficiencies

Market Segmentation

- Electrical Infrastructure
 - o□UPS Systems
 - o□Generators
 - o□Switches & Switchgears
 - o□PDUs
 - o□Other Electrical Infrastructure
- Mechanical Infrastructure
 - o□Cooling Systems
 - o□Rack Cabinets
 - o□Other Mechanical Infrastructure
- Cooling Systems
 - o□CRAC and CRAH Units
 - o□Chillers Units
 - o□Cooling Towers, Condensers, and Dry Coolers
 - o□Other Cooling Units
- Cooling Techniques
 - o□Liquid-Based
 - o□Air-Based
- General Construction
 - o□Core & Shell Development
 - o□Installation & commissioning Services
 - o□Building & Engineering Design
 - o□Fire Detection & Suppression Systems
 - o□Physical Security
 - o□Data Center Infrastructure Management (DCIM)
- Tier Standard
 - o□Tier I & Tier II
 - o□Tier III
 - o□Tier IV
- Geography
 - o□Brazil
 - o□Mexico
 - o□Colombia
 - o□Chile
 - o□Rest of Latin America

KEY TRENDS DRIVING THE MARKET

5G Deployments Enabling Edge Data Center Deployments

- Latin American countries are working toward digital transformation to attract foreign investments. 5G network deployment fuels digital transformation, IoT, smart cities, and the fourth industrial revolution
- In February 2021, Chile completed the first 5G spectrum tender in Latin America. In November 2021, Brazil raised around \$8

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billion investment to deploy and operate 5G data networks

- The increasing deployment and coverage of 5G will lead to the development of edge data center facilities, thereby creating investment opportunities in the market

Adoption of Cloud, IoT, and Big Data Driving Wholesale Colocation

- In Latin America, one of the major drivers for the increasing construction of hyperscale facilities is the increase in cloud computing services, driven by the digitalization of enterprises, and the shift to private, public, or a hybrid cloud architecture
- For providing high quality and low latency cloud-based services across Latin America, the major cloud service providers are expanding their reach across the region via cloud regions/cloud-on-ramps/Points of Presence (PoPs)

Deployment of Submarine Cables Fueling Data Center Construction

- In Latin America, countries having submarine cable connectivity include Brazil, Colombia, Chile, Peru, Uruguay, and Mexico, among others, connecting the region internally as well as to other regions such as Africa, Europe, North America, and APAC
- Many submarine cables, such as the Firmina cable, and the Caribbean Express (CX cable), among others, are expected to be operational in the next two to three years and will connect the region further with the rest of the world
- Investments in submarine cables in the region have grown considerably over the years with the help of enterprises and governments, which continuously strengthen fiber infrastructure for better connectivity with other countries
- Hyperscale operators and telecommunication providers are also investing in submarine cables to improve network connectivity in various Latin American countries

Tax Incentives Boosting Data Center Construction

- Various countries are providing tax incentives to investors based locally or even global investors, which will aid in increased construction of data centers
- The majority of these tax incentives provided by provinces and countries are based on jobs, land taxes, capital, and the lower power price needs of data center investments across regions
- A free trade zone is provided in Columbia as a suitable location for mission-critical facilities enabling tax incentives for the data center developers. Similarly, the southern region of Patagonia, an upcoming digital hub in Chile, is planning to provide tax incentives for data center growth

COMPETITIVE ANALYSIS

- Some of the major vendors involved in the Latin America data center construction market are AECOM, Constructora Sudamericana, Fluor Corporation, and Jacobs Engineering, among others
- These vendors are collaborating with data center operators to provide reliable construction solutions. For instance, ZFB Group is looking to invest around \$90 million in the Zetta DC data center based on Tier IV standards
- Core & shell development retains the highest share in construction. In Latin America, the cost of core & shell is lower in countries such as Mexico and Colombia while highest in Chile & Argentina
- In recent years, there has been an immense focus on reducing the energy consumption and carbon emission levels of data centers to improve their green credentials

Key Support Infrastructure

- ABB
- Alfa Laval
- Assa Abloy
- Axis Communications

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- [] Munters
- [] Piller Power Systems
- [] Panduit
- [] Rittal
- [] Rolls-Royce
- [] Schneider Electric
- [] STULZ
- [] Siemens
- [] Vertiv

Prominent Construction Contractors

- [] AECOM
- [] Aceco TI
- [] Constructora Sudamericana
- [] Fluor Corporation
- [] Holder Construction
- [] Jacobs Engineering
- [] Quark
- [] ZFB Group

Key Data Center Investors

- [] Ascenty
- [] Ava Telecom
- [] Amazon Web Services (AWS)
- [] CloudHQ
- [] EdgeConneX
- [] Equinix
- [] Google
- [] Globenet
- [] HostDime
- [] InterNexa
- [] Lumen Technologies
- [] Microsoft
- [] Nabiax
- [] ODATA
- [] Scala Data Centers

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- []Tigo (MALLICOM)
- []Quantico

Table of Contents:

- 1 RESEARCH METHODOLOGY
- 2 RESEARCH OBJECTIVES
- 3 RESEARCH PROCESS
- 4 SCOPE & COVERAGE
 - 4.1 MARKET DEFINITION
 - 4.2 BASE YEAR
 - 4.3 SCOPE OF THE STUDY
 - 4.4 MARKET SEGMENTS
 - 4.4.1 MARKET SEGMENTATION BY INFRASTRUCTURE
 - 4.4.2 MARKET SEGMENTATION BY ELECTRICAL INFRASTRUCTURE
 - 4.4.3 MARKET SEGMENTATION BY MECHANICAL INFRASTRUCTURE
 - 4.4.4 MARKET SEGMENTATION BY COOLING SYSTEMS
 - 4.4.5 MARKET SEGMENTATION BY COOLING TECHNIQUES
 - 4.4.6 MARKET SEGMENTATION BY GENERAL CONSTRUCTION
 - 4.4.7 MARKET SEGMENTATION BY TIER STANDARDS
 - 4.4.8 MARKET SEGMENTATION BY GEOGRAPHY
- 5 REPORT ASSUMPTIONS & CAVEATS
 - 5.1 KEY CAVEATS
 - 5.2 CURRENCY CONVERSION
 - 5.3 MARKET DERIVATION
- 6 MARKET AT A GLANCE
- 7 PREMIUM INSIGHTS
 - 7.1 KEY MARKET HIGHLIGHTS
 - 7.2 KEY TRENDS DRIVING THE MARKET
 - 7.3 COMPETITIVE ANALYSIS
- 8 INTRODUCTION
 - 8.1 KEY CONSIDERATIONS IN DATA CENTER CONSTRUCTION
 - 8.2 DATA CENTER DESIGN CERTIFICATIONS
 - 8.2.1 UPTIME INSTITUTE TIER STANDARDS
 - 8.2.2 LEED CERTIFICATION
 - 8.2.3 TIA 942 CERTIFICATION
 - 8.2.4 ANSI/BICSI 002-2019 CERTIFICATION
 - 8.3 CONSTRUCTION COSTS IN LATIN AMERICA
 - 8.3.1 BRAZIL
 - 8.3.2 MEXICO
 - 8.3.3 CHILE
 - 8.3.4 COLOMBIA
 - 8.3.5 ARGENTINA

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8.4 DATA CENTER SITE SELECTION CRITERIA

8.4.1 KEY

9 MARKET OPPORTUNITIES & TRENDS

9.1 5G DEPLOYMENTS FUELING EDGE DATA CENTER DEPLOYMENTS

9.2 GROWING RACK POWER DENSITY

9.3 DEPLOYMENT OF MICROGRIDS IN DATA CENTERS

9.4 IMPLEMENTATION OF AUTOMATION & AI IN DATA CENTERS

9.5 SUSTAINABLE DATA CENTER CONSTRUCTION MATERIALS

9.6 RISING ADOPTION OF DCIM

10 MARKET GROWTH ENABLERS

10.1 ADOPTION OF CLOUD, IOT & BIG DATA

10.2 IMPACT OF COVID-19

10.3 CONSTRUCTION OF MODULAR DATA CENTERS

10.4 INCREASED DEPLOYMENT OF SUBMARINE CABLES

10.5 THRIVING DIGITAL ECONOMY IN LATIN AMERICA

10.6 TAX INCENTIVES ENHANCING DATA CENTER INVESTMENTS

11 MARKET RESTRAINTS

11.1 SECURITY CHALLENGES IN DATA CENTERS

11.2 LOCATION CONSTRAINTS ON DATA CENTER CONSTRUCTION

11.3 LACK OF SKILLED WORKFORCE

11.4 RISING CARBON EMISSIONS FROM DATA CENTERS

11.5 SUPPLY CHAIN CHALLENGES

12 MARKET LANDSCAPE

12.1 MARKET OVERVIEW

12.2 INVESTMENT: MARKET SIZE & FORECAST

12.3 AREA: MARKET SIZE & FORECAST

12.4 POWER CAPACITY: MARKET SIZE & FORECAST

12.5 FIVE FORCES ANALYSIS

12.5.1 THREAT OF NEW ENTRANTS

12.5.2 BARGAINING POWER OF SUPPLIERS

12.5.3 BARGAINING POWER OF BUYERS

12.5.4 THREAT OF SUBSTITUTES

12.5.5 COMPETITIVE RIVALRY

13 INFRASTRUCTURE

13.1 MARKET SNAPSHOT & GROWTH ENGINE

13.2 ELECTRICAL INFRASTRUCTURE

13.2.1 MARKET OVERVIEW

13.2.2 MARKET SIZE & FORECAST

13.3 MECHANICAL INFRASTRUCTURE

13.3.1 MARKET OVERVIEW

13.3.2 MARKET SIZE & FORECAST

13.4 GENERAL CONSTRUCTION

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13.4.1 MARKET OVERVIEW
13.4.2 MARKET SIZE & FORECAST

14 ELECTRICAL INFRASTRUCTURE
14.1 MARKET SNAPSHOT & GROWTH ENGINE
14.2 UPS SYSTEMS
14.2.1 MARKET OVERVIEW
14.2.2 MARKET SIZE & FORECAST
14.3 GENERATORS
14.3.1 MARKET OVERVIEW
14.3.2 MARKET SIZE & FORECAST
14.4 TRANSFER SWITCHES & SWITCHGEAR
14.4.1 MARKET OVERVIEW
14.4.2 MARKET SIZE & FORECAST
14.5 POWER DISTRIBUTION UNITS
14.5.1 MARKET OVERVIEW
14.5.2 MARKET SIZE & FORECAST
14.6 OTHER ELECTRICAL INFRASTRUCTURE
14.6.1 MARKET OVERVIEW
14.6.2 MARKET SIZE & FORECAST

15 MECHANICAL INFRASTRUCTURE
15.1 MARKET SNAPSHOT & GROWTH ENGINE
15.2 COOLING SYSTEMS
15.2.1 MARKET OVERVIEW
15.2.2 MARKET SIZE & FORECAST
15.3 RACKS
15.3.1 MARKET OVERVIEW
15.3.2 MARKET SIZE & FORECAST
15.4 OTHER MECHANICAL INFRASTRUCTURE
15.4.1 MARKET OVERVIEW
15.4.2 MARKET SIZE & FORECAST

16 COOLING SYSTEMS
16.1 MARKET SNAPSHOT & GROWTH ENGINE
16.2 CRAC & CRAH UNITS
16.2.1 MARKET OVERVIEW
16.2.2 MARKET SIZE & FORECAST
16.3 CHILLER UNITS
16.3.1 MARKET OVERVIEW
16.3.2 MARKET SIZE & FORECAST
16.4 COOLING TOWERS, CONDENSERS & DRY COOLERS
16.4.1 MARKET OVERVIEW
16.4.2 MARKET SIZE & FORECAST
16.5 ECONOMIZERS & EVAPORATIVE COOLERS
16.5.1 MARKET OVERVIEW
16.5.2 MARKET SIZE & FORECAST

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16.6 OTHER COOLING UNITS

16.6.1 MARKET OVERVIEW

16.6.2 MARKET SIZE & FORECAST

17 COOLING TECHNIQUE

17.1 MARKET SNAPSHOT & GROWTH ENGINE

17.2 AIR-BASED COOLING TECHNIQUE

17.2.1 MARKET OVERVIEW

17.2.2 MARKET SIZE & FORECAST

17.3 LIQUID-BASED COOLING TECHNIQUE

17.3.1 MARKET OVERVIEW

17.3.2 MARKET SIZE & FORECAST

18 GENERAL CONSTRUCTION

18.1 MARKET SNAPSHOT & GROWTH ENGINE

18.2 CORE & SHELL DEVELOPMENT

18.2.1 MARKET OVERVIEW

18.2.2 MARKET SIZE & FORECAST

18.3 INSTALLATION & COMMISSIONING SERVICES

18.3.1 MARKET OVERVIEW

18.3.2 MARKET SIZE & FORECAST

18.4 ENGINEERING & BUILDING DESIGN

18.4.1 MARKET OVERVIEW

18.4.2 MARKET SIZE & FORECAST

18.5 FIRE DETECTION & SUPPRESSION

18.5.1 MARKET OVERVIEW

18.5.2 MARKET SIZE & FORECAST

18.6 PHYSICAL SECURITY

18.6.1 MARKET OVERVIEW

18.6.2 MARKET SIZE & FORECAST

18.7 DCIM/BMS SOLUTIONS

18.7.1 MARKET OVERVIEW

18.7.2 MARKET SIZE & FORECAST

19 TIER STANDARDS

19.1 MARKET SNAPSHOT & GROWTH ENGINE

19.2 OVERVIEW OF TIER STANDARDS

19.3 TIER I & II

19.3.1 MARKET OVERVIEW

19.3.2 MARKET SIZE & FORECAST

19.4 TIER III

19.4.1 MARKET OVERVIEW

19.4.2 MARKET SIZE & FORECAST

19.5 TIER IV

19.5.1 MARKET OVERVIEW

19.5.2 MARKET SIZE & FORECAST

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20 GEOGRAPHY

20.1 INVESTMENT: MARKET SNAPSHOT & GROWTH ENGINE

20.2 AREA: MARKET SNAPSHOT & GROWTH ENGINE

20.3 POWER CAPACITY: MARKET SNAPSHOT & GROWTH ENGINE

21 BRAZIL

21.1 MARKET SNAPSHOT & GROWTH ENGINE

21.2 MARKET OVERVIEW

21.3 INVESTMENT: MARKET SIZE & FORECAST

21.4 AREA: MARKET SIZE & FORECAST

21.5 POWER CAPACITY: MARKET SIZE & FORECAST

21.6 SUPPORT INFRASTRUCTURE: MARKET SIZE & FORECAST

22 CHILE

22.1 MARKET SNAPSHOT & GROWTH ENGINE

22.2 MARKET OVERVIEW

22.3 INVESTMENT: MARKET SIZE & FORECAST

22.4 AREA: MARKET SIZE & FORECAST

22.5 POWER CAPACITY: MARKET SIZE & FORECAST

22.6 SUPPORT INFRASTRUCTURE: MARKET SIZE & FORECAST

23 COLOMBIA

23.1 MARKET SNAPSHOT & GROWTH ENGINE

23.2 MARKET OVERVIEW

23.3 INVESTMENT: MARKET SIZE & FORECAST

23.4 AREA: MARKET SIZE & FORECAST

23.5 POWER CAPACITY: MARKET SIZE & FORECAST

23.6 SUPPORT INFRASTRUCTURE: MARKET SIZE & FORECAST

24 MEXICO

24.1 MARKET SNAPSHOT & GROWTH ENGINE

24.2 MARKET OVERVIEW

24.3 INVESTMENT: MARKET SIZE & FORECAST

24.4 AREA: MARKET SIZE & FORECAST

24.5 POWER CAPACITY: MARKET SIZE & FORECAST

24.6 SUPPORT INFRASTRUCTURE: MARKET SIZE & FORECAST

25 REST OF LATIN AMERICA

25.1 MARKET SNAPSHOT & GROWTH ENGINE

25.2 MARKET OVERVIEW

25.3 INVESTMENT: MARKET SIZE & FORECAST

25.4 AREA: MARKET SIZE & FORECAST

25.5 POWER CAPACITY: MARKET SIZE & FORECAST

25.6 SUPPORT INFRASTRUCTURE: MARKET SIZE & FORECAST

26 COMPETITIVE LANDSCAPE

26.1 SUPPORT INFRASTRUCTURE

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26.2 CONSTRUCTION CONTRACTORS

26.3 DATA CENTER INVESTORS

27 PROMINENT SUPPORT INFRASTRUCTURE

27.1 ABB

27.1.1 BUSINESS OVERVIEW

27.1.2 PRODUCT OFFERINGS

27.2 ALFA LAVAL

27.2.1 BUSINESS OVERVIEW

27.2.2 PRODUCT OFFERINGS

27.3 ASSA ABLOY

27.3.1 BUSINESS OVERVIEW

27.3.2 PRODUCT OFFERINGS

27.4 AXIS COMMUNICATIONS

27.4.1 BUSINESS OVERVIEW

27.4.2 PRODUCT OFFERINGS

27.5 BOSCH SECURITY SYSTEMS (ROBERT BOSCH)

27.5.1 BUSINESS OVERVIEW

27.5.2 PRODUCT OFFERINGS

27.6 CATERPILLAR

27.6.1 BUSINESS OVERVIEW

27.6.2 PRODUCT OFFERINGS

27.7 CUMMINS

27.7.1 BUSINESS OVERVIEW

27.7.2 PRODUCT OFFERINGS

27.8 DELTA ELECTRONICS

27.8.1 BUSINESS OVERVIEW

27.8.2 PRODUCT OFFERINGS

27.9 DAIKIN APPLIED (DAIKIN INDUSTRIES)

27.9.1 BUSINESS OVERVIEW

27.9.2 PRODUCT OFFERINGS

27.10 EATON

27.10.1 BUSINESS OVERVIEW

27.10.2 PRODUCT OFFERINGS

27.11 GENERAC POWER SYSTEM

27.11.1 BUSINESS OVERVIEW

27.11.2 PRODUCT OFFERINGS

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27.12 HONEYWELL INTERNATIONAL

27.12.1 BUSINESS OVERVIEW

27.12.2 PRODUCT OFFERINGS

27.13 JOHNSON CONTROLS

27.13.1 BUSINESS OVERVIEW

27.13.2 PRODUCT OFFERINGS

27.14 LEGRAND

27.14.1 BUSINESS OVERVIEW

27.14.2 PRODUCT OFFERINGS

27.15 MITSUBISHI ELECTRIC

27.15.1 BUSINESS OVERVIEW

27.15.2 PRODUCT OFFERINGS

27.16 MUNTERS

27.16.1 BUSINESS OVERVIEW

27.16.2 PRODUCT OFFERINGS

27.17 PILLER POWER SYSTEMS

27.17.1 BUSINESS OVERVIEW

27.17.2 PRODUCT OFFERINGS

27.18 PANDUIT

27.18.1 BUSINESS OVERVIEW

27.18.2 PRODUCT OFFERINGS

27.19 RITTAL

27.19.1 BUSINESS OVERVIEW

27.19.2 PRODUCT OFFERINGS

27.20 ROLLS-ROYCE

27.20.1 BUSINESS OVERVIEW

27.20.2 PRODUCT OFFERINGS

27.21 SCHNEIDER ELECTRIC

27.21.1 BUSINESS OVERVIEW

27.21.2 PRODUCT OFFERINGS

27.22 STULZ

27.22.1 BUSINESS OVERVIEW

27.22.2 PRODUCT OFFERINGS

27.23 SIEMENS

27.23.1 BUSINESS OVERVIEW

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27.23.2 PRODUCT OFFERINGS

27.24 VERTIV

27.24.1 BUSINESS OVERVIEW

27.24.2 PRODUCT OFFERINGS

28 PROMINENT CONSTRUCTION CONTRACTORS

28.1 AECOM

28.1.1 BUSINESS OVERVIEW

28.1.2 SERVICE OFFERINGS

28.2 ACECO TI

28.2.1 BUSINESS OVERVIEW

28.2.2 SERVICE OFFERINGS

28.3 CONSTRUCTORA SUDAMERICANA

28.3.1 BUSINESS OVERVIEW

28.3.2 SERVICE OFFERINGS

28.4 FLUOR CORPORATION

28.4.1 BUSINESS OVERVIEW

28.4.2 SERVICE OFFERINGS

28.5 HOLDER CONSTRUCTION

28.5.1 BUSINESS OVERVIEW

28.5.2 SERVICE OFFERINGS

28.6 JACOBS ENGINEERING

28.6.1 BUSINESS OVERVIEW

28.6.2 SERVICE OFFERINGS

28.7 QUARK

28.7.1 BUSINESS OVERVIEW

28.7.2 SERVICE OFFERINGS

28.8 ZFB GROUP

28.8.1 BUSINESS OVERVIEW

28.8.2 SERVICE OFFERINGS

29 PROMINENT DATA CENTER INVESTORS

29.1 ASCENTY

29.1.1 BUSINESS OVERVIEW

29.1.2 SERVICE OFFERINGS

29.2 AVA TELECOM

29.2.1 BUSINESS OVERVIEW

29.2.2 SERVICE OFFERINGS

29.3 AMAZON WEB SERVICES

29.3.1 BUSINESS OVERVIEW

29.3.2 SERVICE OFFERINGS

29.4 CLOUDHQ

29.4.1 BUSINESS OVERVIEW

29.4.2 SERVICE OFFERINGS

29.5 EDGECONNEX

29.5.1 BUSINESS OVERVIEW

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| | |
|---------|--------------------|
| 29.5.2 | SERVICE OFFERINGS |
| 29.6 | EQUINIX |
| 29.6.1 | BUSINESS OVERVIEW |
| 29.6.2 | SERVICE OFFERINGS |
| 29.6.3 | KEY NEWS |
| 29.7 | GOOGLE |
| 29.7.1 | BUSINESS OVERVIEW |
| 29.7.2 | SERVICE OFFERINGS |
| 29.8 | GLOBENET |
| 29.8.1 | BUSINESS OVERVIEW |
| 29.8.2 | SERVICE OFFERINGS |
| 29.9 | HOSTDIME |
| 29.9.1 | BUSINESS OVERVIEW |
| 29.9.2 | SERVICE OFFERINGS |
| 29.10 | INTERNEXA |
| 29.10.1 | BUSINESS OVERVIEW |
| 29.10.2 | SERVICE OFFERINGS |
| 29.11 | LUMEN TECHNOLOGIES |
| 29.11.1 | BUSINESS OVERVIEW |
| 29.11.2 | SERVICE OFFERINGS |
| 29.12 | MICROSOFT |
| 29.12.1 | BUSINESS OVERVIEW |
| 29.12.2 | SERVICE OFFERINGS |
| 29.13 | NABIAX |
| 29.13.1 | BUSINESS OVERVIEW |
| 29.13.2 | SERVICE OFFERINGS |
| 29.14 | ODATA |
| 29.14.1 | BUSINESS OVERVIEW |
| 29.14.2 | SERVICE OFFERINGS |
| 29.15 | SCALA DATA CENTERS |
| 29.15.1 | BUSINESS OVERVIEW |
| 29.15.2 | SERVICE OFFERINGS |
| 29.16 | TELMEX |
| 29.16.1 | BUSINESS OVERVIEW |
| 29.16.2 | SERVICE OFFERINGS |
| 29.17 | TIGO (MILLICOM) |
| 29.17.1 | BUSINESS OVERVIEW |
| 29.17.2 | SERVICE OFFERINGS |
| 29.18 | QUANTICO |
| 29.18.1 | BUSINESS OVERVIEW |
| 29.18.2 | SERVICE OFFERINGS |

30 REPORT SUMMARY

30.1 KEY TAKEAWAYS

31 QUANTITATIVE SUMMARY

31.1 LATIN AMERICA DATA CENTER CONSTRUCTION MARKET

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- 31.1.1 INVESTMENT: MARKET SIZE & FORECAST
- 31.1.2 INFRASTRUCTURE: MARKET SIZE & FORECAST
- 31.2 MARKET SEGMENTATION
 - 31.2.1 ELECTRICAL INFRASTRUCTURE: MARKET SIZE & FORECAST
 - 31.2.2 MECHANICAL INFRASTRUCTURE: MARKET SIZE & FORECAST
 - 31.2.3 COOLING SYSTEMS: MARKET SIZE & FORECAST
 - 31.2.4 COOLING TECHNIQUES: MARKET SIZE & FORECAST
 - 31.2.5 GENERAL CONSTRUCTION: MARKET SIZE & FORECAST
 - 31.2.6 TIER STANDARDS: MARKET SIZE & FORECAST
- 31.3 MARKET BY GEOGRAPHY
 - 31.3.1 INVESTMENT: MARKET SIZE & FORECAST
 - 31.3.2 AREA: MARKET SIZE & FORECAST
 - 31.3.3 POWER CAPACITY: MARKET SIZE & FORECAST
- 31.4 BRAZIL
 - 31.4.1 INVESTMENT: MARKET SIZE & FORECAST
 - 31.4.2 INFRASTRUCTURE: MARKET SIZE & FORECAST
- 31.5 CHILE
 - 31.5.1 INVESTMENT: MARKET SIZE & FORECAST
 - 31.5.2 INFRASTRUCTURE: MARKET SIZE & FORECAST
- 31.6 COLOMBIA
 - 31.6.1 INVESTMENT: MARKET SIZE & FORECAST
 - 31.6.2 INFRASTRUCTURE: MARKET SIZE & FORECAST
- 31.7 MEXICO
 - 31.7.1 INVESTMENT: MARKET SIZE & FORECAST
 - 31.7.2 INFRASTRUCTURE: MARKET SIZE & FORECAST
- 31.8 REST OF LATIN AMERICA
 - 31.8.1 INVESTMENT: MARKET SIZE & FORECAST
 - 31.8.2 INFRASTRUCTURE: MARKET SIZE & FORECAST
- 32 APPENDIX
 - 32.1 ABBREVIATIONS

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*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

☐ ** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

| | | | |
|---------------|----------------------|-------------------------------|---|
| Email* | <input type="text"/> | Phone* | <input type="text"/> |
| First Name* | <input type="text"/> | Last Name* | <input type="text"/> |
| Job title* | <input type="text"/> | | |
| Company Name* | <input type="text"/> | EU Vat / Tax ID / NIP number* | <input type="text"/> |
| Address* | <input type="text"/> | City* | <input type="text"/> |
| Zip Code* | <input type="text"/> | Country* | <input type="text"/> |
| | | Date | <input type="text" value="2025-05-09"/> |
| | | Signature | |

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