

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

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Report description:

The Latin America data center rack market is expected to grow at a CAGR of 10.05% during 2022-2027

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

- Adoption of Cloud Services
- Growing Colocation Data Center Investments
- Investments in Modular Data Center Solutions
- Growth in 5G & Edge Data Center Deployments

KEY HIGHLIGHTS

- The Latin America data center rack market investments are led by Brazil, which accounted for around 50% of the industry investments in 2021.
- The growth in cloud computing and the growing interest of global cloud service providers will also increase the demand for OCP scale infrastructure, including taller, deeper, and broader rack solutions among extensive data center facilities.
- Adopting HPC technologies such as AI, big data, and IoT plays a significant role in developing advanced OCP scale rack infrastructure, including converged and hyper-converged infrastructure.
- Vendors such as Huawei Technologies, Cisco Systems, Delta Electronics, Schneider Electric, and Vertiv are also a part of the OCP community. They continuously innovate their infrastructure offerings to match the current industry trends and demand.

MARKET TRENDS

Adoption of OCP Scale Infrastructure is Gaining Traction

- Organizations have started adopting OCP infrastructure designs. To support the adoption of OCP designs, the OCP community

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introduced Open Rack standards, which enable the development of rack infrastructure and facilitate flexible mounting of OCP IT infrastructure solutions.

- The development of cloud data centers by hyperscale operators, such as AWS, Microsoft, and Google, will adopt OCP rack infrastructure in data centers. Moreover, organizations that are not part of the OCP community are involved in adopting OCP infrastructure solutions from authorized suppliers.

- Taller, Deeper, and Wider Racks are Witnessing Growth in Adoption

- Almost all rack vendors incorporate taller racks into their portfolio, including servers and network cabinets taller than the industry-standard 42U configuration.

- In recent years, infrastructure adoption in rack also included UPS systems that are primarily of 2U configuration and modern IT equipment that require multiple cable connections and generates more heat. These requirements lead to the procurement of broader and deeper racks in data centers.

- Many data center operators plan to optimize space and improve efficiency in their facilities. This prompts operators to opt for customized taller, more comprehensive, and deeper rack solutions per their operational and space requirements.

Adoption of Rack Standards, such as the International Electrotechnical Commission (IEC)

- The IEC 60297 standard specifies mechanical structures that house electronic equipment, including mechanical structures of 19-inch data center racks. This standard has multiple sub-parts that elaborate the dimensions for rack parts such as front panels, chassis, sub-racks, and associated units such as injector/extractor handles, keying, and alignment points.

- Vendors in the Latin America data center rack market, such as Eaton, offer rack cabinet solutions approved by IEC standards.

Segmentation Analysis

- The Latin America data center rack market has several global rack infrastructure providers, offering a range of rack cabinets between heights below 42U to above 42U. Most data center operators in the region adopt rack cabinets of sizes between 42U to 47U. Operators such as Equinix adopts racks of heights ranging from 42U to 47U.

- Most investments were made by colocation data center operators that aided significant growth in the market in 2021 in comparison to the last year.

- The number of shipments of rack cabinets grew by over 3% in 2021, aided by the growing construction of data centers in the region, along with the expansion of existing facilities.

- Industry share of rack units of height between 42 U to 47 U is growing in terms of investments aided by growth in the construction of data centers of power capacity up to 5 MW at increasing locations.

Segmentation by Product

- Enclosures & Cabinets

- Accessories

Segmentation by End User

- Colocation Data Centers

- Enterprise Data Centers

Segmentation by Rack Size

- Below 42U

- 42U

- 45U-47U

- 48U

- Others

GEOGRAPHICAL ANALYSIS

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- In terms of shipments, the market is led by Brazil with a market share of around 53% in 2021, followed by Mexico with a share of about 27%. Other countries such as Colombia, Chile, and other countries collectively contributed 20% of the market share in 2021.

- The Latin America data center rack market in shipments is expected to grow at an absolute growth rate of around 77.62% between 2021 and 2027, with Chile expected to grow at a CAGR of around 12.34% during the forecast period.

Segmentation by Country

- Latin America
 - o Brazil
 - o Mexico
 - o Colombia
 - o Chile
 - o Other Latin American Countries

COMPETITIVE LANDSCAPE

The market has several data center rack infrastructure providers such as Austin Hughes Electronics, Chatsworth Products, Cisco Systems, Delta Electronics, Belden, Eaton, Fujitsu, Hewlett Packard Enterprise, Panduit, Schneider Electric, and others.

The data center rack market is moving toward adopting customized rack infrastructure solutions, thereby reducing the standard rack adoption. Moreover, initiatives such as OCP are prompting mega and hyperscale enterprise data center operators to adopt open designs for racks. Colocation providers are increasingly designing their facilities using available rack systems.

Prominent Data Center Rack Vendors

- Austin Hughes Electronics
- Belden
- Chatsworth Products (CPI)
- Cisco Systems
- Delta Electronics
- Eaton
- Fujitsu
- Hewlett Packard Enterprise
- Huawei Technologies
- Inspur
- Oracle
- Panduit
- Schneider Electric
- Schroff (NVENT)
- Startech.com
- Vertiv

KEY QUESTIONS ANSWERED

1. How Big is the Latin America Data Center Rack Market?
2. What are the Major Drivers in The Latin America Data Center Rack Market?
3. What are the Latest Trends in The Latin America Data Center Rack Market?
4. Which Country Contributes the Largest Share in The Latin America Data Center Rack Market?

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5. Who are the Major Players in The Latin America Data Center Rack Market?

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