

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

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Report description:

The Latin America Modular Data Center market is expected to grow at a CAGR of 19% during 2022-2027.

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

- Deployment of edge data centers
- Covid-19 boosting the deployment of prefabricated data centers
- Implementation of advanced data center technologies
- Sustainability measures in the modular data center market
- Increasing demand for big data and IoT

Advantages of modular data centers

- Less money and time are required during the assembly process
- The quick development of infrastructure due to proper planning
- Promotes flexibility for data center operators
- Cost-effective solutions that match the requirements
- Flexible assembly of cooling, power, and racks

The Latin American region has witnessed considerable growth in adopting modern technologies and construction of data centers over the past years. The development of solid fiber connectivity, increasing reliability in power supply, and high demand for data center services from BFSI, IT, and healthcare are major factors driving the development of modular data centers in Latin America.

While Brazil, Mexico, Colombia, and Chile will remain major demand contributors to the segment, countries like Argentina, Costa Rica, Ecuador, Uruguay, Paraguay, Bolivia, and Peru will also witness an increased demand for modular data centers owing to

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increasing digitalization.

Key Highlights of the Latin America Modular Data Center Market:

- Colocation and telecommunications service providers are the main contributors to the modular data center market in Latin America. The region is also witnessing an increased presence of cloud service providers.
 - In 2021, functional module modular data centers took up 65% of the market, and all-in module modular data centers contributed 35% to the market share among Latin American countries.
 - Brazil is the leading region in the Latin America data center market, with more than 50% of investments in the area. There is growing internet penetration and adoption of cloud-based services by businesses in the country, followed by Chile, Mexico, and Colombia.
 - An increase in demand for edge data centers, the requirement of cloud at the edge, and an increase in adoption of technology such as big data and IoT will continue to grow the modular data center investment from colocation, cloud, internet, and telecommunication providers.
 - In February 2022, AWS announced a list of 26 countries in which it was planning to launch Local Zones for its Edge locations. They include Colombia, Argentina, Peru, Mexico, Brazil, and Chile.
 - Modular data centers can support improved PUE and lower carbon emissions compared to traditional brick-and-mortar facilities, reducing OPEX, thus leading many operators to deploy modular data centers.
- Increasing modular data center design & deployment
- Continuous evolution in the design and engineering of a data center facility by key operators and architecture and engineering firms will bring in multiple innovations in the development and operations of a data center.
 - Modular data center build-outs tackle challenges such as a high PUE, high operational costs of traditional data centers, and high environmental impact
 - Modular data center deployment using a templated plug-and-play method to build modules makes requirement gathering of each material type easier, ensuring that it is very little or no wastage.
 - Countries that have deployed 5G will witness the development of Performance-Optimized Data center (POD) facilities.
- Increase in the adoption of cloud at Edge, Big Data, and IoT
- The edge cloud is a modern method for deploying cloud data centers at several locations nearer to customers, boosted by the growth in the deployment of modular data centers
 - Major cloud service providers such as Google, Amazon Web Services (AWS), and Microsoft are aiming at cloud edge computing capabilities
 - Several data center operators such as Equinix, Ascenty (Digital Realty), EdgeConneX, and others host cloud on-ramps to access hyperscale cloud service providers directly and privately
 - Big data and IoT are fueling the modular data centers industry as these solutions offer flexibility to support HPC solutions such as IoT and big data
 - The growing adoption of smart devices, the increasing demand for analytics, cloud adoption, and the growth of wireless networking technologies have led several organizations in Latin America to invest in big data and IoT technology
- Innovative data center technologies and sustainable initiatives to boost the market
- Data center operators are continuously involved in innovating new techniques to operate sustainable data centers that will reduce the CAPEX and OPEX
 - The adoption of hybrid cloud modules helps organizations to get the benefit of cost-effectiveness and increased data mobility between private and public cloud
 - Liquid immersion cooling is among the top innovations that can benefit operators, as pre-designed and prefabricated data centers can easily be equipped with immersion cooling solutions without the need to create extra space for cooling systems
 - The deployment of modular data centers will lead to a significant reduction in energy costs as the power is supplied to the only module in operation

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GEOGRAPHY AND VENDOR ANALYSIS

- Huawei Technologies is among the top vendors, with a significant Latin America modular data center market share.
- The growth potential in Brazil and Mexico is moderate, whereas countries such as Chile and Colombia have high growth potential.
- Due to enterprise and on-site data centers, the Caribbean region is also likely to witness more modular data center deployments.
- The presence of edge data center facilities across the region will boost modular data center deployments.

Major Vendors:

- ABB
- Atos
- Cisco Systems
- Dell Technologies
- Delta Electronics
- Eaton
- Hewlett Packard
- Huawei
- IBM
- Rittal
- Schneider Electric
- Stulz
- Vertiv

Other Prominent Vendors

- Actemium
- American Portwell
- Canovate
- Fiberhome
- GESAB
- KEHUA Data (KEHUA Tech)
- Rahi
- Silent-Aire
- ZTE

Market Segments by:

- Infrastructure
 - o All-in-One
- Functional Module
 - o IT Module
 - o Power Module
 - o Cooling Module
- Country
 - o Brazil
 - o Mexico
 - o Colombia
 - o Chile

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KEY QUESTIONS ANSWERED

1. How much is the Latin America Modular Data Center Market Worth?
2. What is the growth rate of the Latin America Modular Data center Market?
3. Who are the Key Players in the Latin America Modular Data center Market?
4. Which functional module generates the highest revenue during the forecast period?

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