

Latin America Data Center Storage Market - Industry Analysis and Forecast 2022-2027

Market Report | 2022-07-27 | 162 pages | Arizton Advisory & Intelligence

AVAILABLE LICENSES:

- Single User License \$2995.00
- Team License \$3500.00
- Enterprisewide \$4500.00

Report description:

The Latin America data center storage market is expected to grow at a CAGR of 7.94% from 2022 to 2027.

The data center storage market comprises several products such as hard disk drives, solid-state drives, storage networking, and other infrastructure. This infrastructure is critical for effective data center storage. The Latin American data center market has witnessed strong growth over the last five years. Especially after the outbreak of COVID-19, the demand for cloud and colocation services has skyrocketed in the market. In 2021, Brazil continued to dominate the data center storage space, whereas Mexico and Chile were upcoming destinations for storage spending in Latin America. The market is also dominated by expansion by global and local cloud service providers across the region. In addition, the demand is driven by government digitalization initiatives to support the growing consumption of online content by consumers in the region.

KEY HIGHLIGHTS

- The Latin American data center storage market is driven by increasing digitalization, accelerated data center investments, especially by cloud service providers, and the adoption of advanced storage technology, like NVMe and software-defined storage.
- Cloud service providers are the main contributors to Latin America's data center storage market. Expanding cloud presence through establishing multiple cloud regions across countries like Brazil, Mexico, Chile, Colombia, and Argentina will drive high-performance storage adoption in the market.
- In 2021, all-flash and hybrid storage systems contributed to around 65% of the market revenue, whereas traditional HDD-based systems dominated in terms of capacity
- The contribution to the storage spending by enterprises across other countries is mostly restricted to on-premises deployment. The leading countries have witnessed strong growth in data center outsourcing services, especially colocation and managed services.
- Most investments will come from telecommunication service providers across several countries in Latin America, as they continue to invest in improving connectivity and offering IT services to end-users.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

-□Edge data center deployments and the establishment of cloud regions at the edge by hyperscale operators will significantly boost the market growth.

SEGMENTAL ANALYSIS

-□Storage architecture/topology, Network Attached Storage (NAS) systems dominate the market adoption, followed by Storage Area Networking (SAN) and Direct Attached Systems (DAS).

-□Adopting technologies such as big data and IoT via digitalization initiatives by local enterprises will boost the procurement of all-flash and hybrid array systems.

-□In Latin America, cloud, IT, and telecom segments are expected to witness the fastest growth in terms of data center storage, owing to factors such as the adoption of cloud by enterprises, development of edge data centers due to 5G deployments, and initiatives such as the pay-as-you-go model for cloud storage.

Segmentation by Storage Architecture

-□NAS

-□SAN

-□DAS

Segmentation by System

-□Traditional Storage

-□All-Flash Storage

-□Hybrid Storage

Segmentation by Industry

-□BFSI

-□Government

-□Cloud/IT

-□Others

KEY MARKET TRENDS

Increasing Innovation in Data Center Storage

-□Innovations in storage media expected to impact the Latin American storage market include adopting DNA and holographic storage.

-□Tape storage is also returning to the storage market, with companies such as Quantum (LTO-9, LTO-8, and LTO-7 tape drives) and Hewlett Packard Enterprise (LTO Ultrium) offering tape storage in the market.

ADOPTION OF SOFTWARE-DEFINED STORAGE

-□Software-defined storage is expected to increasingly be used in data centers over the next few years, mainly due to over 80% of the data generated is unstructured, which makes it more difficult to store in a traditional storage system.

-□Though the use cases of software-defined storage are currently minimal in the Latin American market, the adoption will grow, along with hyper-converged platforms/rack-level architecture being adopted, even in on-premise deployments in Latin America.

GEOGRAPHICAL ANALYSIS

-□Brazil contributed around 40% to storage spending in 2021. It is expected that Mexico and Chile will flourish during 2022-2023, following Colombia and Argentina during 2024-2026.

-□Around 25% of large enterprises in Brazil have adopted AI and machine learning technologies, contributing to the strong growth

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

of high-performance storage systems in the market.

-□ In other Latin American countries, currently, there is a meager presence of third-party data center services, which is expected to grow via investments by technological firms and cloud service providers, further contributing to the storage market growth.

VENDOR ANALYSIS

-□ In Latin America, the data center storage market is very competitive, especially with the advent of ODM infrastructure being procured by hyperscale operators for their storage needs.

-□ The major procurement of storage infrastructure in Latin America is being carried out by cloud service providers involved in rapid expansions across the region with additional cloud regions. These operators are involved in the procurement of storage systems, ranging from low to high-performance storage solutions.

-□ Storage infrastructure vendors such as Huawei, Fujitsu, IBM, HPE, NetApp, Pure Storage, and Dell Technologies have a strong presence in the region, either directly or through reseller/distribution partners.

Prominent Vendors

-□ Dell Technologies

-□ Fujitsu

-□ Hewlett Packard Enterprise (HPE)

-□ Hitachi Vantara

-□ Huawei

-□ IBM

-□ Intel

-□ Kingston Technology

-□ Lenovo

-□ NEC

-□ NetApp

-□ Oracle

-□ Pure Storage

-□ Samsung Electronics

-□ Seagate Technology

-□ Solidigm

-□ Toshiba

-□ Western Digital

-□ Wistron (WIWYNN)

KEY QUESTIONS ANSWERED

1. □ HOW BIG IS THE LATIN AMERICA DATA CENTER STORAGE MARKET?

2. □ WHICH COUNTRY ACROSS LATIN AMERICA HOLDS THE LARGEST SHARE IN THE DATA CENTER STORAGE MARKET?

3. □ WHAT ARE THE GROWTH FACTORS IN THE LATIN AMERICA DATA CENTER STORAGE MARKET?

4. □ WHO ARE THE PLAYERS IN THE LATIN AMERICA DATA CENTER STORAGE MARKET?

5. □ WHAT ARE THE LATEST TRENDS IN THE LATIN AMERICA DATA CENTER STORAGE MARKET?

Table of Contents:

1 RESEARCH METHODOLOGY

2 RESEARCH OBJECTIVES

3 RESEARCH PROCESS

4 SCOPE & COVERAGE

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4.1	MARKET DEFINITION
4.2	BASE YEAR
4.3	SCOPE OF THE STUDY
4.3.1	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
8	MARKET OPPORTUNITIES & TRENDS
8.1	5G & EDGE DATA CENTER DEPLOYMENTS
8.2	ADOPTION OF NVME STORAGE
8.3	ADOPTION OF SOFTWARE-DEFINED STORAGE
8.4	ADOPTION OF TAPE STORAGE
8.5	INNOVATIONS IN STORAGE MEDIA
9	MARKET GROWTH ENABLERS
9.1	IMPACT OF COVID-19
9.2	IOT AND BIG DATA PROCESSING
9.3	GROWING DEPLOYMENT OF FLASH STORAGE
9.4	INCREASING ADOPTION OF AI & ML WORKLOADS
9.5	CLOUD ADOPTION DOMINATING STORAGE SPENDING
9.6	INCREASING COLOCATION DATA CENTER INVESTMENTS ACROSS THE REGION
10	MARKET RESTRAINTS
10.1	SUPPLY SHORTAGES
10.2	LACK OF A SKILLED WORKFORCE
10.3	CYBERSECURITY CONCERNS
11	MARKET LANDSCAPE
11.1	MARKET OVERVIEW
11.2	MARKET SIZE & FORECAST
11.3	FIVE FORCES ANALYSIS
11.3.1	THREAT OF NEW ENTRANTS
11.3.2	BARGAINING POWER OF SUPPLIERS
11.3.3	BARGAINING POWER OF BUYERS
11.3.4	THREAT OF SUBSTITUTES
11.3.5	COMPETITIVE RIVALRY
12	STORAGE ARCHITECTURE
12.1	MARKET SNAPSHOT & GROWTH ENGINE
12.2	NAS
12.2.1	MARKET OVERVIEW

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

12.2.2 MARKET SIZE & FORECAST

12.3 SAN

12.3.1 MARKET OVERVIEW

12.3.2 MARKET SIZE & FORECAST

12.4 DAS

12.4.1 MARKET OVERVIEW

12.4.2 MARKET SIZE & FORECAST

13 SYSTEM

13.1 MARKET SNAPSHOT & GROWTH ENGINE

13.2 TRADITIONAL STORAGE

13.2.1 MARKET OVERVIEW

13.2.2 MARKET SIZE & FORECAST

13.3 ALL-FLASH STORAGE

13.3.1 MARKET OVERVIEW

13.3.2 MARKET SIZE & FORECAST

13.4 HYBRID STORAGE

13.4.1 MARKET OVERVIEW

13.4.2 MARKET SIZE & FORECAST

14 INDUSTRY

14.1 MARKET SNAPSHOT & GROWTH ENGINE

14.2 BFSI

14.2.1 MARKET OVERVIEW

14.2.2 MARKET SIZE & FORECAST

14.3 GOVERNMENT

14.3.1 MARKET OVERVIEW

14.3.2 MARKET SIZE & FORECAST

14.4 CLOUD/IT

14.4.1 MARKET OVERVIEW

14.4.2 MARKET SIZE & FORECAST

14.5 OTHERS

14.5.1 MARKET OVERVIEW

14.5.2 MARKET SIZE & FORECAST

15 GEOGRAPHY

15.1 MARKET SNAPSHOT & GROWTH ENGINE

16 BRAZIL

16.1 MARKET OVERVIEW

16.2 MARKET SIZE & FORECAST

17 MEXICO

17.1 MARKET OVERVIEW

17.2 MARKET SIZE & FORECAST

18 CHILE

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

18.1 MARKET OVERVIEW
18.2 MARKET SIZE & FORECAST

19 REST OF LATIN AMERICA
19.1 MARKET OVERVIEW
19.2 MARKET SIZE & FORECAST

20 COMPETITIVE LANDSCAPE
20.1 COMPETITION OVERVIEW

21 VENDOR LANDSCAPE
21.1 DELL TECHNOLOGIES
21.1.1 BUSINESS OVERVIEW
21.1.2 PRODUCT OFFERINGS
21.2 FUJITSU
21.2.1 BUSINESS OVERVIEW
21.2.2 PRODUCT OFFERINGS
21.3 HEWLETT PACKARD ENTERPRISE
21.3.1 BUSINESS OVERVIEW
21.3.2 PRODUCT OFFERINGS
21.4 HITACHI VANTARA
21.4.1 BUSINESS OVERVIEW
21.4.2 PRODUCT OFFERINGS
21.5 HUAWEI
21.5.1 BUSINESS OVERVIEW
21.5.2 PRODUCT OFFERINGS
21.6 IBM
21.6.1 BUSINESS OVERVIEW
21.6.2 PRODUCT OFFERINGS
21.7 INTEL
21.7.1 BUSINESS OVERVIEW
21.7.2 PRODUCT OFFERINGS
21.8 KINGSTON TECHNOLOGY
21.8.1 BUSINESS OVERVIEW
21.8.2 PRODUCT OFFERINGS
21.9 LENOVO
21.9.1 BUSINESS OVERVIEW
21.9.2 PRODUCT OFFERINGS
21.10 NEC
21.10.1 BUSINESS OVERVIEW
21.10.2 PRODUCT OFFERINGS
21.11 NETAPP
21.11.1 BUSINESS OVERVIEW
21.11.2 PRODUCT OFFERINGS
21.12 ORACLE
21.12.1 BUSINESS OVERVIEW
21.12.2 PRODUCT OFFERINGS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 21.13 PURE STORAGE
 - 21.13.1 BUSINESS OVERVIEW
 - 21.13.2 PRODUCT OFFERINGS
- 21.14 SAMSUNG ELECTRONICS
 - 21.14.1 BUSINESS OVERVIEW
 - 21.14.2 PRODUCT OFFERINGS
- 21.15 SEAGATE TECHNOLOGY
 - 21.15.1 BUSINESS OVERVIEW
 - 21.15.2 PRODUCT OFFERINGS
- 21.16 SOLIDIGM
 - 21.16.1 BUSINESS OVERVIEW
 - 21.16.2 PRODUCT OFFERINGS
- 21.17 TOSHIBA
 - 21.17.1 BUSINESS OVERVIEW
 - 21.17.2 PRODUCT OFFERINGS
- 21.18 WESTERN DIGITAL
 - 21.18.1 BUSINESS OVERVIEW
 - 21.18.2 PRODUCT OFFERINGS
- 21.19 WISTRON (WIWYNN)
 - 21.19.1 BUSINESS OVERVIEW
 - 21.19.2 PRODUCT OFFERINGS

- 22 REPORT SUMMARY
 - 22.1 KEY TAKEAWAYS

- 23 QUANTITATIVE SUMMARY
 - 23.1 OVERALL MARKET
 - 23.2 STORAGE ARCHITECTURE: MARKET SIZE & FORECAST
 - 23.3 SYSTEM: MARKET SIZE & FORECAST
 - 23.4 INDUSTRY: MARKET SIZE & FORECAST
 - 23.5 GEOGRAPHY: MARKET SIZE & FORECAST

- 24 APPENDIX
 - 24.1 ABBREVIATIONS

Latin America Data Center Storage Market - Industry Analysis and Forecast 2022-2027

Market Report | 2022-07-27 | 162 pages | Arizton Advisory & Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
<input type="checkbox"/>	Single User License	\$2995.00
<input type="checkbox"/>	Team License	\$3500.00
<input type="checkbox"/>	Enterprisewide	\$4500.00
		VAT
		Total

*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="2025-05-07"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com