

Latin America Data Center Colocation Market - Industry Outlook & Forecast 2023-2028

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Report description:

The Latin America data center colocation market is expected to grow at a CAGR of 8.10% from 2022 to 2028.

KEY HIGHLIGHTS

- The rise in coverage of 5G and its deployment in the region will attract more edge data center investment across the Latin America (LATAM) region. The deployment of submarine cables such as Caribbean Express (CX cable) and Firmina cable, which is expected to be live over the next two to three years, will help the region to establish a better connection with the rest of the world.
- Several governments across the LATAM region have initiated schemes and incentives to attract data center investments. In Colombia, a free trade zone has been introduced. Similarly, Patagonia is emerging as a data center hub in Chile, as the government has planned several tax incentives to grow the Latin America data center colocation market.
- Within Latin America, major contributors to green data center development include countries such as Brazil, Chile, Argentina, and Paraguay, among others, wherein data center operators and governments are working toward the adoption of renewable energy and other such measures.
- Operators such as HostDime, KIO Networks, and Scala Data Centers, among others, are focused on building data centers with a PUE of <1.5 in Latin America's data center colocation market via renewable energy, free cooling, and efficient IT infrastructure.

SEGMENTATION ANALYSIS

Segmentation by Colocation Service

- Retail Colocation
- Wholesale Colocation

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Segmentation by Infrastructure

- Electrical Infrastructure
- Mechanical Infrastructure
- General Construction

Segmentation by Electrical Infrastructure

- UPS Systems
- Generators
- Transfer Switches & Switchgear
- Power Distribution Units
- Other Electrical Infrastructure

Segmentation by Mechanical Infrastructure

- Cooling Systems
- Racks
- Other Mechanical Infrastructure

Segmentation by Cooling Systems

- CRAC & CRAH Units
- Chiller Units
- Cooling Towers, Condensers & Dry Coolers
- Economizers & Evaporative Coolers
- Other Cooling Units

Segmentation by General Construction

- Core & Shell Development
- Installation & Commissioning Services
- Engineering & Building Design
- Fire Detection & Suppression
- Physical Security
- DCIM/BMS Solutions

Segmentation by Tier Standard

- Tier I & II
- Tier III
- Tier IV

MARKET TRENDS & OPPORTUNITIES

Procurement of Renewable Energy in Latin America

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Many renewable energy sources are available in different countries across Latin America, which can help to bring energy efficiency to industries such as data centers. The rise in average industrial electricity pricing, in combination with the push toward sustainability across the region, has prompted operators to focus on renewable energy procurement via Power Purchase Agreements (PPAs). Over the last two years, several operators in Latin America have either procured or signed power purchase agreements to power their facilities in the region.

5G Deployments Fuelling EDGE Data Center Deployments

In Latin America, 5G network deployments have fueled digital transformation, IoT, smart cities, and the industrial revolution. Latin American countries are working toward adopting digital transformation to attract foreign investments. The 5G network deployment fuels digital transformation, IoT, smart cities, and the fourth industrial revolution. The rapid investment in 5G technology has increased the demand for high-bandwidth internet in Tier II and Tier III cities and contributed to generating substantial data. These factors have accelerated data center development to process the information on par with major cities and simultaneously support the growth of Latin America data center colocation. The deployment of 5G services has impacted ICT, government, manufacturing, services, agriculture, and retail industries. 5G network services play a key role in supporting enterprise digitalization and will drive the adoption of IoT applications.

REGIONAL ANALYSIS

- Brazil has multiple colocation providers, such as Ascenty, Scala Data Centers, and ODATA. Several telecom providers, namely GlobeNet Telecom, Ava Telecom, and Embratel are expanding their presence in the country. Colocation operators lead investments in the country and are expected to witness further growth with several new project announcements.
- The Latin America data center colocation market also sees investments in submarine cable projects, connecting with other regions and countries. Mexico City has emerged as the primary data center location in the country, with eight existing third-party data centers. Cancun has emerged as a major location with around six submarine cable landing stations.
- Colombia is witnessing the deployment of trial phases of 5G network connectivity with investment for trial from operators such as Nokia AngloGold Ashanti Colombia.
- Santiago is a major Chilean city witnessing data center development owing to its strategic location and being the economic and social capital. Most operators in Chile, such as ODATA, Ascenty, and EdgeConneX, operate facilities in Santiago.

Segmentation by Geography

- Latin America
 - o□Brazil
 - o□Mexico
 - o□Chile
 - o□Colombia
 - o□Rest of Latin America

VENDOR LANDSCAPE

- Some prominent vendors in the Latin America data center colocation market include Ascenty (Digital Realty), ODATA, Equinix, HostDime, CloudHQ, and Scala Data Centers.
- Several mergers and acquisitions occur among the colocation vendors in the Latin America data center colocation market. For instance, Equinix acquired Axtel, a Mexico-based data center operator, while CyrusOne purchased stakes in ODATA.
- The high costs of procuring modern security systems will intensify the competitiveness among vendors in the market.

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Additionally, the DCIM/BMS solutions will remain competitive due to their role in reducing the OPEX of data center facilities.

Prominent Data Center Investors

- Ascenty
- AVA Telecom
- Equinix
- Edgeconnex
- GlobeNet Telecom
- OneX
- Scala Data Centers
- Claro
- Nabiax
- Gtd Peru
- Lumen Technologies
- ODATA
- Air Link Communications
- Belize Network Information Centre
- Blue NAP Americas
- Brac Informatics Centre (BIC)
- Digicel
- Epic.io
- Telecom Italia Sparkle
- KIO Networks
- Oxygen
- Millicom
- InterNexa
- Lumen Technologies
- Entel
- SONDA
- HostDime
- CloudHQ
- IPXON Networks

KEY QUESTIONS ANSWERED:

- 1.□How big is the Latin America data center colocation market?
- 2.□What is the growth rate of the Latin America data center colocation market?
- 3.□What is the estimated market size in terms of area in the Latin America data center colocation market by 2028?
- 4.□What are the key trends in the Latin America data center colocation market?
- 5.□How many MW of power capacity is expected to reach the Latin America data center colocation market by 2028?

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