

## **Brazil Data Center Market - Investment Analysis & Growth Opportunities 2024-2029**

Market Report | 2024-02-22 | 139 pages | Arizton Advisory & Intelligence

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### **Report description:**

The Brazil data center market was valued at USD 3.11 Billion in 2023 and is expected to grow at a CAGR of 7.16% during the forecast period.

### **KEY HIGHLIGHTS**

- In Brazil data center market, Sao Paulo is the premier hub for investments in the country, driven by substantial contributions from industry leaders such as Microsoft, Huawei, Cirion Technologies, Ascenty, Scala Data Centers, CloudHQ, and Elea Digital.
- Brazil stands out with 15 existing undersea cables that connect Brazil to other Latin American countries, Portugal, Cameroon, Angola, and the US. The Brazil data center market is witnessing the deployment of an upcoming submarine cable, the Firmina submarine cable, by Google, connecting Brazil with Argentina, Uruguay, and the US.
- Major telecom companies such as TIM Brasil, V.tal, Vivo (Telefonica Brazil), Carlo Brazil, Algar Telecom, Brisanet Telecommunications, and Sercomtel are involved in the commercial deployment of 5G services across Brazil. For instance, in February 2023, Cisco Systems and V.tal signed a partnership to enhance Brazil's neutral multi-tenant fiber optic network capacity and expand the 5G service network connectivity and internet.
- Brazil aims to augment its power generation by 10 GW in 2023, with 90% sourced from wind and solar energy, per the National Electric Energy Agency (ANEEL). EDP Energias, TotalEnergies, Engie Brasil Energia, Atlas Renewable Energy, and AES Brasil are some of the major renewable energy companies in Brazil that are involved in various investments in renewable energy plants, PPAs, etc.,
- Brazil is developing both Free Trade Zones (FTZs) and Export Processing Zones (EPZs). It currently has 16 EPZs across 15 states. FTZs include the Manaus FTZ, the Macapa FTZ, and the Tabatinga FTZ, among others.

### **WHY SHOULD YOU BUY THIS RESEARCH?**

- Market size available in the investment, area, power capacity, and Brazil colocation market revenue.
- An assessment of the data center investment in Brazil by colocation, hyperscale, and enterprise operators.

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- Investments in the area (square feet) and power capacity (MW) across cities in the country.
- A detailed study of the existing Brazil data center market landscape, an in-depth industry analysis, and insightful predictions about market size during the forecast period.
- Snapshot of existing and upcoming third-party data center facilities in Brazil
- I.□ Facilities Covered (Existing): 68
- II.□ Facilities Identified (Upcoming): 21
- III.□ Coverage: 9 States
- IV.□ Existing vs. Upcoming (Area)
- V.□ Existing vs. Upcoming (IT Load Capacity)
- Data Center Colocation Market in Brazil
- I.□ Market Revenue & Forecast (2023-2029)
- II.□ Retail Colocation Revenue
- The Brazil data center market investments are classified into IT, power, cooling, and general construction services with sizing and forecast.
- A comprehensive analysis of the latest trends, growth rate, potential opportunities, growth restraints, and prospects for the industry.
- Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the industry.
- A transparent research methodology and the analysis of the demand and supply aspects of the industry.

## VENDOR LANDSCAPE

- In Brazil, data center providers Ascenty, Angola Cables, Ava Telecom, Cirion Technologies, Equinix, GlobeNet, Microsoft, ODATA (Aligned Data Centers), Onex Data Center, Quantico, Scala Data Centers, V.tal are involved in the development of data center facilities, which are opened or under construction in 2023.
- The Brazil data center market is also witnessing investment from new entrants in Brazil, such as CloudHQ, Surfix Data Center, and EVEO.
- In Brazil data center market, most of the colocation and hyperscale operators are moving towards renewable energy procurement for facility operations. For instance, in September 2023, Microsoft Brazil signed a 15-year power purchase agreement (PPA) with AES Brasil to procure 150 MW of wind energy. AES Brasil will start supplying sustainable electricity to Microsoft in July 2024.

## EXISTING VS. UPCOMING DATA CENTERS

- Existing Facilities in the Region (Area and Power Capacity)
- Sao Paulo
- Other States
- List of Upcoming Facilities in the region (Area and Power Capacity)

## IT Infrastructure Providers

- Arista Networks
- Broadcom
- Cisco Systems
- Dell Technologies
- Hewlett Packard Enterprise (HPE)
- Huawei Technologies
- IBM

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- Juniper Networks
- Lenovo
- NetApp
- Oracle
- Pure Storage

#### Data Center Construction Contractors & Sub-Contractors

- AECOM
- Afonso Franca Engenharia
- Aceco TI
- Constructora Sudamericana
- Fluor Corporation
- Jacobs Engineering
- Modular Data Centers
- Quark
- ZFB Group
- Zeittec

#### Support Infrastructure Providers

- ABB
- Alfa Laval
- Bosch Security and Safety Systems
- Caterpillar
- Cummins
- Daikin Applied
- Delta Electronics
- Eaton
- Honeywell International
- Johnson Controls
- Legrand
- Munters
- Mitsubishi Electric
- Piller Power Systems
- Panduit
- Rittal
- Rolls Royce
- Schneider Electric
- Siemens
- STULZ
- Vertiv

#### Data Center Investors

- Ascenty
- Angola Cables
- Ava Telecom
- Cirion Technologies
- Elea Digital

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- Equinix
- GlobeNet
- HostDime
- Lumen Technologies
- Microsoft
- Nabiax
- ODATA (Aligned Data Centers)
- Onex Data Center
- Quantico
- Scala Data Centers
- Teccloud
- V.tal

#### New Entrants

- CloudHQ
- Eveo
- Surfix Data Center

#### REPORT COVERAGE:

This report analyses Brazil's data center market share. It elaboratively analyses the existing and upcoming facilities and investments in IT, electrical, mechanical infrastructure, general construction, and tier standards. It discusses market sizing and investment estimation for different segments. The segmentation includes:

- IT Infrastructure
- Servers
- Storage Systems
- Network Infrastructure
- Electrical Infrastructure
- UPS Systems
- Generators
- Switches & Switchgear
- PDUs
- Other Electrical Infrastructure
- Mechanical Infrastructure
- Cooling Systems
- Racks
- Other Mechanical Infrastructure
- Cooling Systems
- CRAC and CRAH Units
- Chillers Units
- Cooling Towers, Condensers, and Dry Coolers
- Economizers & Evaporative Coolers
- Other Cooling Units
- General Construction
- Core & Shell Development
- Installation & Commissioning Services

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- Fire Detection & Suppression
- Physical Security
- Data Center Infrastructure Management (DCIM)
- Tier Standard
- Tier I & Tier II
- Tier III
- Tier IV

#### KEY QUESTIONS ANSWERED:

- 1.□What will be the market size of the Brazil data center market?
- 2.□How many data centers are there in Brazil?
- 3.□What is the growth rate of the Brazil data center market?
- 4.□What are the driving factors in the Brazil data center market?
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