

Brazil Data Center Server - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2030

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Report description:

The Brazil data center server market reached a value of USD 1.4 billion in the previous year, and it is further projected to register a CAGR of 7.1% during the forecast period. The increasing demand for cloud computing among small and medium-sized enterprises (SMEs), government regulations for local data security, and growing investment by domestic players are some of the major factors driving the demand for data centers in the country.

Under Construction IT Load Capacity: The upcoming IT load capacity of the Brazil data center rack market is expected to reach 1,200 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 0.4 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach 231000 units by 2029. Sao Paulo is expected to house the maximum number of racks by 2029.

Planned Submarine Cables: There are close to 16 submarine cable systems connecting Brazil, and many are under construction.

Brazil Data Center Server Market Trends

Blade Servers to Grow At A Faster Pace In The Coming Years

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- Blade servers are often used for huge processing data, but they also produce a lot of heat. These tend to be more expensive than rack or tower servers and require proper humidity and cooling infrastructure to run efficiently without damaging the hardware.
- Blade servers are installed in server bays, not in racks. This structure allows more servers to be installed in a smaller area. For example, a rack may only hold 10 rack servers, but a blade bay can hold 20 blade servers. The blade chassis can still be rack mounted, but more blade servers can fit in the same space compared to rack servers.
- To cater to end-user needs, the top companies are focusing on blade servers in data centers. The growing adoption of technologies such as cloud computing, artificial intelligence (AI), and IT services by businesses is propelling the use of servers in data centers.
- Brazil was the largest Latin American e-commerce market for remote purchases, totaling USD 79.7 billion in 2020. Since a large portion of the population gained access to the Internet for the first time using a smart device rather than a desktop computer or laptop, the increasing penetration of smart devices, particularly smartphones, over the past ten years has been the driving force behind digital inclusion in Brazil. Brazil's high mobile appeal makes it essential that e-commerce solutions are responsive and mobile-friendly.
- The segment's growing need for data center services is anticipated to be fueled by the soaring demand for online transactions over wireless devices such as smartphones, tablets, and laptops, thus increasing data traffic over these channels.

IT & Telecommunication is The Largest Market In The Country

- There is an increasing demand for IT services that ensure business continuity and make organizations more resilient to potential disruptions. In this way, the growth rate of IT services will increase after 2021. In 2021, the Scala data center will begin construction on its SP4 facility, and it was originally scheduled to go live in April 2022. SP4's 18 MW capacity has already been taken over 100% by single-tenant cloud providers, demonstrating the growing demand for cloud services in the country.
- Business spending on 5G and edge computing is likely to increase once 5G network services are rolled out, according to ICT trade group Brasscom. Data center investment increased 17% year-over-year to USD 850 million, demonstrating strong demand for core Internet and e-services infrastructure. Blascom also forecasts about USD 86 billion in investment in mobile and connectivity projects from 2021 to 2024.
- In 2022, the Brazilian market for security services was valued at USD 1 billion, with an average growth rate of about 10% Y-o-Y since the pandemic. Sales of security products will surpass USD 860 million in the future, with cloud computing garnering significant interest. As the popularity of cloud computing services, security services, and applications increases, a more sizable colocation of cloud-based data centers is expected to be constructed in Brazil.
- In 2021, the telecom segment grew by 1.9%, driven by higher demand for digital services. Brazil's 5G spectrum auction held in October 2021 raised about USD 8.5 billion. By 2035, the introduction of 5G in Brazil may have an economic impact of USD 1.2 trillion and a productivity boost of USD 3 trillion. Thus, the inclusion of network advancements may increase data generation and lead to the demand for more data processing facilities for analysis and storage.

Brazil Data Center Server Industry Overview

The Brazil data center server market is moderately competitive and has gained a competitive edge in recent years. In terms of market share, a few major players, such as Dell Inc., OVH SAS., Hewlett Packard Enterprise (HPE), Super Micro Computer Inc., and Cisco Systems Inc., currently dominate the market.

In August 2023, Hewlett Packard Enterprise announced that global IT services provider phoenixNAP is expanding its bare metal cloud platform with cloud-native HPE ProLiant RL300 Gen11 servers powered by energy-efficient processors from Ampere

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Computing.

In March 2023, Supermicro launched a new server that uses a standalone liquid cooling system and is designed as a platform for developing and running AI software. SYS-751GE-TNRT-NV1 Server is overheating. It features four NVIDIA A100 GPUs consuming 300 W each and is liquid-cooled by a standalone system.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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