

Brazil Data Center Market - Investment Analysis & Growth Opportunities 2025-2030

Market Report | 2025-02-25 | 126 pages | Arizton Advisory & Intelligence

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Report description:

The Brazil data center market is expected to grow at a CAGR of 9.81% from 2024 to 2030.

KEY HIGHLIGHTS

- The Brazil data center market has about 73 operational colocation data centers and most colocation data centers are being developed according to Tier III standards.
- Sao Paulo is the top data center destination in the Brazil data center market. It continues to be Brazil's leading hub for data center expansion, marked by a concentrated growth in advanced facilities, hyperscale data centers, and dedicated cloud regions. There are more than 40 existing and 20+ upcoming data centers in Sao Paulo.
- According to Turner & Townsend's 2024 Data Center Cost Index, developing a data center in Sao Paulo costs \$10.10 per watt, making it one of the highest costs in the Latin America region. On average, the cost of developing data centers in Brazil ranges between \$8.50 and \$9.50 per watt.
- Scala AI City, a collaboration between Scala Data Centers and the government of Rio Grande do Sul has emerged as the largest data center initiative in Latin America, representing a significant investment in the future of artificial intelligence, machine learning, and cloud computing technologies within the region.

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.
 - Data center 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 market analysis, and insightful predictions about the Brazil data center market size during the forecast period.
 - Snapshot of existing and upcoming third-party data center facilities in Brazil
- o Facilities Covered (Existing): 73

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- o□Facilities Identified (Upcoming): 25
- o□Coverage: 9+ Locations
- o□Existing vs. Upcoming (Data Center Area)
- o□Existing vs. Upcoming (IT Load Capacity)
- Data center colocation market in Brazil
- o□Colocation Market Revenue & Forecast (2021-2030)
- o□Retail Colocation Revenue (2021-2030)
- o□Retail Colocation Pricing
- The Brazil data center landscape 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 market.
- Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the market.
- A transparent research methodology and the analysis of the demand and supply aspects of the market.

VENDOR LANDSCAPE

- In the current landscape of colocation investors, several established companies play a significant role. Notable players in the Brazil data center market include Ascenty, Equinix, Scala Data Centers, ODATA (Aligned Data Centers), Elea Data Centers, Cirion Technologies, and Angola Cable, among others.
- Companies such as Ada Infrastructure, Surfex Data Center, CloudHQ, and 247 Data Center are emerging in the Brazil data center market, reflecting a growing demand for data center services and innovative colocation solutions. This dynamic environment is fostering competition and promoting advancements in technology and customer offerings.
- The cloud market in Brazil is expected to continue experiencing significant growth in the future. Major global cloud providers in the Brazil data center market such as Amazon Web Services (AWS), Microsoft, Google, Oracle Cloud, Tencent Cloud, Huawei Cloud, and others continue to expand their presence.
- For instance, in November 2024, Microsoft announced its plan to invest USD 2.70 billion in cloud and AI Infrastructure over the next three years in Brazil. Earlier, in September 2024, Amazon Web Services (AWS) announced its plan to invest around USD 1.80 billion to expand its data center operations throughout 2024.

EXISTING VS. UPCOMING DATA CENTERS

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

IT Infrastructure Providers

- Arista Networks
- Broadcom
- Cisco
- Dell Technologies
- Hewlett Packard Enterprise
- Huawei Technologies

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- [] IBM
- [] Lenovo
- [] NetApp
- [] Oracle
- [] Pure Storage

Data Center Construction Contractors & Sub-Contractors

- [] AECOM
- [] Afonso Franca Engenharia
- [] Aceco TI
- [] Constructora Sudamericana
- [] Fluor Corporation
- [] Grupo PML
- [] Jacobs Engineering
- [] Modular Data Centers
- [] Mendes Holler
- [] Quark
- [] Racional Engenharia
- [] Zeittec
- [] ZFB Group

Support Infrastructure Providers

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

Data Center Investors

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- Actis (NextStream)
- Amazon Web Services
- Ascenty
- Angola Cables
- Ava Telecom
- Cirion Technologies
- Elea Data Centers
- Equinix
- EVEO
- Hostdime
- Microsoft
- ODATA (Aligned Data Centers)
- OneX Data Center
- Quantico Data Center
- Scala Data Centers
- Takoda Data Centers
- Tecloud
- Tecto Data Centers (V.tal)

New Entrants

- ADA Infrastructure
- CloudHQ
- Surfix Data Center
- 247 Data Centers

REPORT COVERAGE:

This report analyses the Brazil 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
 - o□Server Infrastructure
 - o□Storage Infrastructure
 - o□Network Infrastructure
- Electrical Infrastructure
 - o□UPS Systems
 - o□Generators
 - o□Switches & Switchgears
 - o□PDUs
 - o□Other Electrical Infrastructure
- Mechanical Infrastructure
 - o□Cooling Systems
 - o□Rack Cabinets
 - o□Other Mechanical Infrastructure
- Cooling Systems
 - o□CRAC and CRAH

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- o□ Chillers
- o□ Cooling Towers, Condensers and Dry Coolers
- o□ Other Cooling Units
- General Construction
- o□ Core & Shell Development
- o□ Installation & commissioning Services
- o□ Building & Engineering Design
- o□ Fire Detection & Suppression Systems
- o□ Physical Security
- o□ Data Center Infrastructure Management (DCIM)
- Tier Standard
- o□ Tier I & Tier II
- o□ Tier III
- o□ Tier IV
- Geography
- o□ Sao Paulo
- o□ Other States

KEY QUESTIONS ANSWERED:

- 1.□ How big is the Brazil data center market?
- 2.□ How much MW of power capacity will be added across Brazil during 2025-2030?
- 3.□ What factors are driving the Brazil data center market?
- 4.□ What is the growth rate of the Brazil data center market?
- 5.□ Which all geographies are included in the Brazil data center market report?

Table of Contents:

- 1.□ Existing & Upcoming Third-Party Data Centers in Brazil
 - 1.1.□ Data Center Snapshot
 - 1.2.□ Data Center Snapshot by Cities
 - 1.3.□ Existing & Upcoming Data Center Supply
 - 1.4.□ List of Upcoming Data Center Projects in Brazil
- 2.□ Investment Opportunities in Brazil
 - 2.1.□ Microeconomic and Macroeconomic factors for Brazil Market
 - 2.2.□ Investment Opportunities in Brazil
 - 2.3.□ Market Investment by Area
 - 2.4.□ Market Investment by Power Capacity
 - 2.5.□ Data Center Colocation Market in Brazil
 - 2.6.□ Colocation Services Market in Brazil
 - 2.7.□ Retail Vs Wholesale Data Center Colocation
 - 2.8.□ Colocation Pricing (Quarter Rack, Half Rack, Full Rack) & Add-ons
- 3.□ Market Dynamics
 - 3.1.□ Market Enablers
 - 3.2.□ Market Trends
 - 3.3.□ Market Restraints
- 4.□ Market Segmentation
 - 4.1.□ IT Infrastructure: Market Size & Forecast

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- 4.2. Electrical Infrastructure: Market Size & Forecast
- 4.3. Mechanical Infrastructure: Market Size & Forecast
- 4.4. General Construction Services: Market Size & Forecast
- 4.5. Tier Standards Investment
 - 4.5.1. Tier I & II
 - 4.5.2. Tier III
 - 4.5.3. Tier IV
- 5. Geography Segmentation
 - 5.1. Sao Paulo
 - 5.2. Other States
- 6. Key Market Participants
 - 6.1. IT Infrastructure Providers
 - 6.2. Construction Contractors & Sub-contractors
 - 6.3. Support Infrastructure Providers
 - 6.4. Data Center Investors
 - 6.5. New Entrants
- 7. Appendix
 - 7.1. Market Derivation
 - 7.2. Site Selection Criteria
 - 7.3. Quantitative Summary

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