

Latin America Data Center Market Landscape 2025-2030

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Report description:

The Latin America data center market by investments is expected to grow at a CAGR of 12.21% from 2024 to 2030.

KEY TRENDS

Shift toward Sustainable Data Center Construction with Renewable Energy Integration

- Investments in renewable energy partnerships and Power Purchase Agreements (PPAs) have become a trend among operators in the Latin America data center market. For instance, investors are implementing innovative approaches, such as solar farms and wind power contracts, to secure a sustainable energy supply while reducing carbon footprints.
- In October 2024, ODATA (Aligned Data Centers) signed a supply agreement with Casa dos Ventos in Brazil to expand its sustainable data center footprint within Latin America.
- Scala Data Centers, in collaboration with Serena, announced a renewable energy supply to meet the demands of hyperscale data centers which will be sourced from Bahia, Brazil, with a capacity of 393 MW. It will begin in 2025.
- International hyperscalers like Google, Microsoft, etc are also involved in the sustainability program in Latin America. For instance, in September 2024, Google signed a carbon removal agreement with Mombak in Brazil to purchase 50,000 tons of carbon removal credits.

Advancement of AI & Automated Technologies In Data Center Operations.

- Latin American countries, including Brazil, Chile, Colombia, Mexico, Argentina, and Uruguay have established national AI strategies and policies to foster AI development and adoption. These policies prioritize ethical AI use, research, education, and collaboration with private sectors. It also emphasizes the importance of inclusive growth, sustainable development, and societal well-being. For example, Brazil's AI strategy promotes human-centered values and fairness, while Colombia's strategy tackles societal and environmental challenges.
- The region is attracting significant investments from both local and international players to build and upgrade AI infrastructure.

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For instance, in September 2024, Microsoft announced its plan to invest USD 2.70 billion in Brazil and USD 1.3 billion in Mexico to expand and upgrade AI infrastructure.

SEGMENTATION INSIGHTS

- In the Latin America data center market, the key providers of UPS systems include Schneider Electric, ABB, Rolls Royce, Delta Electronics, Vertiv, and Eaton. Most of the data centers in Latin America are equipped with the N+1 redundant setup.
- Most of the data center service providers involved in developing new facilities will be under zero water usage. Due to the scarcity of water availability in the region, most of the data center facilities are moving toward adopting efficient air-based cooling systems. For instance, Google was originally planning to use 7.6 million liters of potable water every day for cooling in Uruguay; however, the excessive use of water compelled Google to revise its plan and switch to an air-based cooling system.
- Hyperscale and mega data centers are estimated to use 2N CRAC or CRAH units, whereas smaller data centers choose N+N systems.
- Tier III data center facilities make up a sizable portion of the emerging projects in the Latin America data center market.

Segmentation by Infrastructure

- IT Infrastructure
- Electrical Infrastructure
- Mechanical Infrastructure
- General Construction

Segmentation by IT Infrastructure

- Server Infrastructure
- Storage Infrastructure
- Network Infrastructure

Segmentation by Electrical Infrastructure

- UPS Systems
- Generators
- Transfer Switches & Switchgear
- PDUs
- 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, and Dry Coolers
- Other Cooling Units

Segmentation by Cooling Techniques

- Air-based
- Liquid-based

Segmentation by General Construction

- Core & Shell Development
- Installation & Commissioning Services
- Engineering & Building Design
- Physical Security

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- Fire Detection & Suppression
 - DCIM
- Segmentation by Tier Standard
- Tier I & II
 - Tier III
 - Tier IV

LATIN AMERICA DATA CENTER MARKET'S GEOGRAPHICAL ANALYSIS

- The data center markets in several Latin American countries are poised for significant growth, driven by a combination of technology advancements, increased digitalization, and strategic government initiatives.
- Brazil has emerged as a leading destination in the Latin America data center market, representing over 41% of the region's total market investments. It is a developed and established market, with Sao Paulo being the top data center destination in the country.
- Mexico is the second-largest country in Latin America, after Brazil, to host major global cloud operators like Google, AWS, and Microsoft. It is one of the fastest-growing digital infrastructure hubs in the region, with Queretaro being a key city.
- Chile is a hub for renewable energy sources; data center companies are trying to maximize their sustainable practices and reduce carbon footprint. There are more than 30 existing data centers in Santiago.
- Colombia is one of the growing digital infrastructure hubs in Latin America. The country is actively fostering the integration of AI through government initiatives and investments from both local and international companies.
- Argentina, with seven operational submarine cables, is becoming one of the best-connected countries in Latin America for data infrastructure. The most prominent location is Buenos Aeries.
- Other Latin American countries, such as Peru, Uruguay, and Panama, are also witnessing growth in digital infrastructure. They are focusing on expanding broadband access, investing in tech infrastructure, and improving connectivity.

Segmentation by Geography

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

VENDOR LANDSCAPE

- The Latin America data center market has the presence of IT infrastructure providers such as Arista Networks, Cisco Systems, Dell Technologies, Hewlett Packard Enterprise, Huawei Technologies, NetApp, Oracle, Pure Storage, and others that are driving the availability of advanced IT infrastructure in the market.
- The Latin America data center market has a presence of several regional and global contractors and subcontractors, such as AECOM, Afonso Franca Engenharia, Cundall, Constructora Sudamericana, Fluor Corporation, Gensler, Jacobs, Syska Hennessy Group, The Weitz Company, Turner Construction, Turner & Townsend and others.
- Some of the leading colocation providers in the Latin America data center market are Ascenty (Digital Realty), ODATA (Aligned Data Centers), Scala Data Centers, Equinix, Elea Data Centers, KIO Networks, EdgeConneX, Cirion Technologies, Tecto Data Centers (V.tal), and others.
- Several hyperscale operators such as Amazon Web Services, Microsoft, and Google are involved in the development of self-built

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data center facilities across the region. For instance, Amazon Web Services received approval for data center development across Chile.

- In August 2024, Google started the construction of its new data center facility in Canelones, Uruguay with an investment of around USD 850 million. It will be the company's second data center in the Latin America region after one operational data center campus in Quilicura, Chile.

- Several new players, including companies like Ada Infrastructure, CloudHQ, Layer 9 Data Centers, MDC Data Centers, Surfix Data Center, and 247 Data Centers have recently announced plans to enter the Latin America data center market, capitalizing on the region's growing demand for digital infrastructure and cloud services.

IT Infrastructure Providers

- Arista Networks
- Broadcom
- Cisco Systems
- Dell Technologies
- Hewlett Packard Enterprise (HPE)
- Huawei
- IBM
- Lenovo
- NetApp
- Oracle
- Pure Storage
- Super Micro Computer

Key Data Center Support Infrastructure Providers

- ABB
- Alfa Laval
- Assa Abloy
- Axis Communications
- Bosch Security Systems (Robert Bosch)
- Caterpillar
- Cummins
- Daikin Applied
- Delta Electronics
- Eaton
- Honeywell
- Johnson Controls
- Legrand
- Mitsubishi Electric
- Munters
- Panduit
- Piller Power Systems
- Rolls-Royce
- Schneider Electric
- Siemens
- STULZ

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Key Data Center Contractors

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- []DLR Group
- []Fluor Corporation
- []Gensler
- []Grupo PML
- []Hyphen
- []Holder Construction
- []HDOS
- []Jacobs
- []KMD Architects
- []Mendes Holler
- []Modular Data Centers
- []PQC
- []Quark
- []Racional Engenharia
- []Soben
- []Syska Hennessey Group
- []The Weitz Company
- []Turner Construction
- []Turner & Townsend
- []Zeittec

Data Center Investors

- []AWS
- []Actis (NextStream)
- []Ascenty
- []Angola Cables
- []Ava Telecom
- []Blue NAP Americas
- []Cirion Technologies
- []Claro
- []DHAmericas
- []Digicel
- []EdgeConneX
- []Elea Data Centers
- []Equinix
- []EVEO
- []Google
- []Gtd

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- []HostDime
- []InterNexa
- []IPXON Networks
- []KIO Networks
- []Mexico Telecom Partners
- []Microsoft
- []Millicom (Tigo)
- []ODATA (Aligned Data Centers)
- []OneX Data Center
- []Oxygen
- []Quantico Data Center
- []Scala Data Centers
- []SONDA
- []Takoda Data Centers
- []Telecom Italia Sparkle
- []Tecto Data Centers
- []Win Empresas

New Entrants

- []247 Data Centers
- []Ada Infrastructure
- []CloudHQ
- []Layer 9 Data Centers
- []MDC Data Centers
- []Surfix Data Center

KEY QUESTIONS ANSWERED:

- 1.[]How big is the Latin America data center market?
- 2.[]What is the growth rate of the Latin America data center market?
- 3.[]What is the estimated market size in terms of area in the Latin America data center market by 2030?
- 4.[]How much MW of power capacity is expected to reach the Latin America data center market by 2030?
- 5.[]What are the key trends in the Latin America data center market?

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