

Latin America Data Center Construction Market - Industry Outlook & Market 2025-2030

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Report description:

The Latin America data center construction market by investment is expected to grow at a CAGR of 18.59% from 2024 to 2030.

LATIN AMERICA DATA CENTER CONSTRUCTION MARKET KEY TRENDS

Shift toward Sustainable Data Center Construction with Renewable Energy Integration

- In 2024, the Latin America data center construction market accounted for a significant shift toward sustainable construction and renewable energy integration due to rising energy costs and the environmental impact of high energy consumption.
- Investments in renewable energy partnerships and Power Purchase Agreements (PPAs) have become a trend among data center operators. 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. Major global players, including Amazon Web Services (AWS), Google, and Microsoft, use renewable energy and improve energy efficiency, including facilities in Latin America.
- In August 2024, Scala Data Centers, in collaboration with Serena, announced renewable energy supply agreements in Latin America. The project will provide wind power to meet the demands of hyperscale data centers, including mixed AI workloads, which will be sourced from Bahia, Brazil, accounting for a capacity of 393 MW and it will begin in 2025.
- Google has committed to using renewable energy in more than 90% of its energy matrix in its Uruguay Data center.

Rise in Digital Economy and Smart City Development

- Latin America's digital economy has expanded rapidly, particularly through the quick expansion in e-commerce, financial technology (fintech), and digital services; this is propelling the demand for robust infrastructure. The COVID-19 pandemic accelerated this trend, making it essential for cities and businesses to rely on digital platforms to operate efficiently.
- With countries including Brazil, Chile, Mexico, and Colombia leading the charge, the digital transformation in Latin America aims

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to build more connected environments that support economic growth and innovation.

- In Mexico, 5 cities are aiming to become smart cities: Tequila, Jalisco; Ciudad Madera, Queretaro; Mexico City; Ciudad Creativa Digital (Jalisco); and Puebla, Smart City.

- Scala Data Centers, owned by Digital Bridge, is planning to build a large data center. The company acquired 700 hectares of land for the AI City in the municipality of Eldorado do Sul.

Enhancement in Submarine & Inland Connectivity

- Latin America is undergoing significant advancements in submarine and inland connectivity, with substantial investments and strategic partnerships aimed at modernizing infrastructure and expanding digital access across the region. There are more than 80 submarine cables connecting to Latin America, out of which 8 to 9 are expected to be deployed in or after 2025.

- One of the most ambitious projects underway is the Humboldt Cable System, which aims to connect Chile with the Asia Pacific region. Developed through a partnership between Chile's Fondo de Infraestructura and H2 Cable, this submarine cable will span approximately 14,810 kilometers, linking Chile to Sydney, Australia, and other locations in Asia Pacific. It will be operational from 2026.

- Parallely, Liberty Networks and Gold Data have joined forces to develop a subsea cable network linking the US with Mexico and Latin America. This project, featuring the GD-1 and LN-1 cables, will offer one of the lowest-latency routes between the US and Mexico, extending connectivity to new data hubs in Colombia, Panama, and the Caribbean.

SEGMENTATION INSIGHTS

- In the Latin America data center construction market, the key providers of UPS systems include Schneider Electric, ABB, Rolls Royce, Delta Electronics, 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 construction market. According to the Uptime Institute Tier Certification, Latin America has more than 200 Tier III data centers (in the design or construction stages), with more than 85 Tier III data center facilities in Brazil.

- There has been significant growth in establishing data centers in the region, specifically in the Tier III and IV certification categories. Many private and public entities, such as BFSI, education, and the government sector, are obtaining the Uptime Institute certifications for their data centers, which are either in the design phase or completely developed. This demonstrates a strong commitment to high reliability and operational excellence in data center infrastructure.

Infrastructure

- Electrical Infrastructure

- Mechanical Infrastructure

- General Construction

Electrical Infrastructure

- UPS Systems

- Generators

- Transfer Switches & Switchgear

- PDUs

- Other Electrical Infrastructure

Mechanical Infrastructure

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- Cooling Systems
- Racks
- Other Mechanical Infrastructure
- Cooling Systems
- CRAC & CRAH Units
- Chillers Units
- Cooling Towers, Condensers, and Dry Coolers
- Other Cooling Units
- Cooling Technique
- Air-based Cooling
- Liquid-based Cooling
- General Construction
- Core & Shell Development
- Installation & Commissioning Services
- Engineering & Building Design
- Fire Detection & Suppression
- Physical Security
- DCIM/BMS Solutions
- Tier Standards
- Tier I & Tier II
- Tier III
- Tier IV

GEOGRAPHICAL ANALYSIS

- Brazil holds a significant share of the Latin America data center construction market. The country's digital transformation policies, coupled with widespread IoT and big data adoption, support major investments in data center infrastructure. It is leading in digital infrastructure expansion, driven by government-supported sustainability initiatives and a growing dependence on renewable energy for data centers.
- Chile is a hub for renewable energy sources; data center companies leverage this to maximize their sustainable practices and reduce their carbon footprint. There are more than 30 existing data centers in Santiago. The country has invested heavily in digital infrastructure to adopt e-commerce, streaming services, and online banking.
- Colombia, with its strategic location and stable economy, has become the ideal destination for businesses looking to establish their presence in Latin America. Its geographical location makes it an attractive place that is risk-free for business operations. Bogota is the primary hub for data center investment.
- Mexico's commitment to smart city initiatives is evident in cities such as Tequila, Ciudad Madera, Mexico City, Ciudad Creativa Digital, and Puebla, which are implementing digital infrastructure to support connectivity, IoT applications, and urban innovation. This smart city push, along with growing e-commerce and rapid internet penetration, is expanding Mexico's digital infrastructure needs and establishing a solid foundation for further data center investments across the country.
- Argentina, with seven operational submarine cables, is recognized as one of the best-connected countries in Latin America for data infrastructure. This extensive network enhances its connectivity within the region, supporting data center growth and international data exchange. The most prominent location is Buenos Aires.

Geography

- Brazil
- Chile
- Colombia

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- []Mexico
- []Argentina
- []Rest of Latin America

LATIN AMERICA DATA CENTER CONSTRUCTION MARKET VENDORS

- []The rising demand for data centers across the country will provide significant opportunities for construction contractors to generate revenue. Some of the well-known construction contractors in this field include AECOM, Turner Construction, KMD Architects, PQC, and Modular Data Centers.
- []The Latin America data center construction market has the presence of all the major global colocation operators, including Ascenty, Equinix, ODATA (Aligned Data Centers), Scala Data Centers, Elea Data Centers, Cirion Technologies, Tecto Data Centers (V.tal), and KIO Networks.
- []The major hyperscale operators investing in the Latin America data center construction market include Amazon Web Services (AWS), Microsoft, and Google. They are expanding their presence across all the top data center destinations in Latin America.
- []The Latin America data center construction market witnessed the entry of several new players such as 247 Data Centers, Ada Infrastructure, CloudHQ, Layer 9 Data Centers, Surfix Data Center, and MDC Data Centers.

Key Data Center Support Infrastructure Providers

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

Prominent Construction Contractors

- []AECOM
- []Afonso Franca Engenharia
- []Constructora Sudamericana

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

Prominent Data Center Investors

- []Actis (NextStream)
- []Amazon Web Services
- []Angola Cables
- []Ascenty
- []Ava Telecom
- []Blue NAP Americas
- []Cirion Technologies
- []Claro
- []DHAmericas
- []Digicel
- []EdgeConneX
- []Elea Data Centers
- []Equinix
- []EVEO
- []Google
- []GTD
- []HostDime
- []InterNexa
- []IPXON Networks
- []KIO Networks
- []Mexico Telecom Partners
- []Microsoft
- []Millicom (Tigo)

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- ODATA (Aligned Data Centers)
- OneX Data Center
- Oxygen
- Quantico Data Center
- Scala Data Centers
- SONDA
- Takoda Data Centers
- Telecom Italia Sparkle
- Tecto Data Centers (V.tal)
- Win Empresas

New Entrants

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

KEY QUESTIONS ANSWERED:

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

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