

Chile Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Chile Data Center Market Analysis

The Chile Data Center Market was valued at USD 0.82 billion in 2025 and estimated to grow from USD 0.89 billion in 2026 to reach USD 1.34 billion by 2031, at a CAGR of 8.51% during the forecast period (2026-2031). In terms of installed base, the market is expected to grow from 385.5 megawatt in 2025 to 552.30 megawatt by 2030, at a CAGR of 7.46% during the forecast period (2025-2030). The market segment shares and estimates are calculated and reported in terms of MW. Aggressive capital deployments by hyperscalers, the build-out of a trans-Pacific subsea cable network, and Chile's 69.9% low-carbon power mix combine to reinforce the country's role as a regional connectivity bridge between Latin America and the Asia-Pacific. The IT load capacity is expected to expand from 385 MW in 2025 to 552 MW by 2030, underscoring the infrastructure-intensive nature of this growth wave. Meanwhile, sub-5% vacancy rates in Santiago signal persistent supply constraints that drive up land and power prices, prompting operators to shift toward secondary hubs and innovative cooling technologies. Large allocations to renewable power purchase agreements protect operators from electricity-price volatility, while a new cybersecurity law raises the technical bar for compliance and favors certified Tier 3 and Tier 4 facilities.

Chile Data Center Market Trends and Insights

Surge in Hyperscaler Capital Inflows

Amazon's USD 4 billion, 15-year "Proyecto Pablo" exemplifies unprecedented confidence in the Chilean data center market and

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signals a structural commitment to regional data sovereignty. Microsoft has pledged USD 3.3 billion for three renewable-powered campuses, deepening competition for skilled labor and power interconnection slots. These long-dated allocations crowd in secondary investments from contractors, network providers, and specialized construction firms, catalyzing a multiplier effect across Chile's digital economy. Capital concentration in Santiago highlights the city's fiber density and skilled workforce, yet new policy incentives are nudging future builds northward toward Antofagasta's solar-rich desert corridors. The extended investment horizon diminishes boom-and-bust cycles and provides clarity for municipal infrastructure planning. As self-builds eclipse lease models, landlords must recalibrate portfolios toward wholesale colocation and edge formats.

Strengthening Subsea Cable Ecosystem

Google's 14,800-kilometer Humboldt cable will deliver 144 Tbps of capacity between Valparaiso and Sydney by 2027, establishing Chile as Latin America's first direct gateway to Asia-Pacific. The system, paired with Curie and exploratory Antartica links, reduces latency for cloud, fintech, and telehealth workloads routed through California today. Domestic carriers, such as Entel, have upgraded to 800G backbones, raising the technical ceiling for inter-data center traffic. Diversified landing points enhance route resiliency and reduce exposure to U.S. coastal disruptions, thereby increasing Chile's attractiveness as a disaster-recovery node. Government co-investment through Desarrollo Pais illustrates rare alignment between public policy and hyperscaler roadmaps. As capacity scales, wholesale IP transit costs should edge downward, reinforcing Santiago's role as a regional internet exchange and fueling further colocation uptake.

Chronic Water Scarcity and Drought Risk

Chile's central region has faced cumulative precipitation losses of 26 millimeters per decade since 1961, imposing structural constraints on water-cooled data center designs. Google's 2024 pause to redesign its Cerrillos project illustrates the capital and schedule penalties associated with retrofitting toward air cooling. Public activism, organized through groups such as Mosacat, has successfully petitioned regulators to revoke or amend environmental permits, adding headline risk and uncertainty to social license. Operators now submit water-usage-effectiveness metrics to the National Cybersecurity Agency, embedding reporting costs and stricter compliance gates into project pipelines. While closed-loop and direct-to-chip cooling promise significant water savings, they require higher upfront costs and specialized maintenance skill sets. Over time, these dynamics encourage the development of new capacity in northern desert regions, where atmospheric conditions favor air cooling and community water concerns are less acute.

Other drivers and restraints analyzed in the detailed report include:

Renewable-Energy Cost Advantage
Rapid Growth in Mobile and Internet Traffic
Limited Land and Power Capacity in the Santiago Hub

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Medium-scale facilities controlled 30.31% of the Chile data center market share in 2025, attracting enterprises that require fault-tolerant environments without the capital burden of hyperscale footprints. Their balanced density profiles accommodate typical enterprise rack loads, supporting gradual cloud migration strategies. Large-scale facilities, however, are on course to register an 8.05% CAGR and will account for the largest incremental share of the Chile data center market size this decade as hyperscalers prefer fewer but denser complexes. Investors view the consolidation toward larger footprints as a hedge against rising land and power prices, because economies of scale improve power-usage effectiveness and spread fixed costs across bigger IT loads. Mega- and massive-scale categories garner outsized media attention yet remain niche, primarily driven by AI-centric

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deployments that require liquid cooling and very high rack densities. Small facilities persist in edge and latency-sensitive mining operations, offering localized compute near extraction sites where fiber reach is limited. Across tiers, the operating-expense advantage of larger halls, combined with improved airflow management, continues to erode the viability of stand-alone enterprise server rooms, funneling demand into professionally managed campuses.

The Chile data center market benefits from a regulatory backdrop that supports phased expansions, allowing operators to commission medium halls first and scale into large footprints once power and fiber upgrades are approved. Flexible zoning statutes in Quilicura and Antofagasta allow owners to append prefabricated modules to existing shells, thereby compressing deployment timelines compared to greenfield options in Santiago. Corporate occupiers are increasingly requesting contiguous growth rights in colocation contracts, a trend that aligns with the trend toward large facilities. Financial sponsors, such as private equity funds, favor these plug-ready parcels because they minimize entitlement risk, a key differentiator in a jurisdiction facing heightened community scrutiny over water use. Although medium facilities will retain their relevance in hybrid-cloud topologies, asset valuations now factor in optionality for future megawatt additions, reinforcing the premium commanded by sites with landbank headroom.

Tier 3 facilities supplied 72.05% of 2025 deployments, solidifying their status as the default enterprise standard that strikes a balance between cost and resilience. The Chile data center market size associated with Tier 3 offerings benefits from concurrent maintainability, enabling operators to perform scheduled work without incurring downtime penalties. Tier 4's 8.97% CAGR, however, highlights a structural shift among banking, fintech, and public-sector clients that cannot tolerate even the short maintenance windows acceptable under Tier 3. Chile's recently enacted cybersecurity framework intensifies audit requirements and incident disclosure, nudging risk-averse tenants toward the extra redundancy delivered by Tier 4 architectures.

Lower-tier designs remain relevant for development and test environments where price sensitivity outweighs uptime assurances, yet their share continues to decline as cloud adoption expands. Differential pricing between Tier 3 and Tier 4 keeps narrowing because modular electrical designs and advances in switchgear reduce incremental CapEx. Vendors now market Tier 4 "lite" modules that can be bolted onto existing Tier 3 shells, offering step-up migration paths for colocation customers. In parallel, insurers factor tier certifications into cyber-risk underwriting, providing indirect financial incentives that elevate Tier 4's total addressable demand pool. Over the forecast horizon, Tier 3 is expected to remain dominant in absolute megawatts; however, the highest rent premiums will concentrate in Tier 4 halls, which are tethered to sovereign cloud and regulated-industry workloads.

The Chile Data Center Market Report is Segmented by Data Center Size (Large, Massive, Medium, Mega, and Small), Tier Type (Tier 1 and 2, Tier 3, and Tier 4), Data Center Type (Hyperscale/Self-built, Enterprise/Edge, and Colocation), End User (BFSI, IT and ITES, E-Commerce, Government, Manufacturing, Media and Entertainment, Telecom, and More), and Hotspot. The Market Forecasts are Provided in Terms of IT Load Capacity (MW).

List of Companies Covered in this Report:

Amazon Web Services, Inc. Google LLC Microsoft Corporation ODATA S.A. Ascenty Data Centers e Telecomunicacoes S.A. Equinix, Inc. GTD Manquehue S.A. EdgeConneX, Inc. SONDA S.A. Entel S.A. Scala Data Centers Participacoes S.A. Kyndryl Holdings, Inc. Cirion Technologies Inc. IPXON Networks S.A. EdgeUno, Inc. NetActuate, Inc. NABIAX S.A. Digital Realty Trust, Inc. V.tal Tecto Data Centers Ltda. Oracle Corporation

Additional Benefits:

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

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