Mexico Data Center Rack - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2030

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Report description:

The Mexican data center rack market reached a volume of around 79,500 units 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 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 Mexico data center rack market is expected to reach 480 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 2.2 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach 120,000 units by 2029. Queretaro is expected to house the maximum number of racks by 2029.

Planned Submarine Cables: There are around 11 submarine cable systems connecting Mexico, and many are under construction.

Mexico Data Center Rack Market Trends

Cloud segment to hold major share in the market

- About 80% of Mexican businesses use cloud-based services through private or hybrid cloud models. This is due to favorable government initiatives that have lowered entry barriers for domestic cloud providers and reduced investment risks associated with technology obsolescence and change.
- Mexican government agencies are focusing on providing cloud-based e-government services as they go digital. This will drive the internet usage of the population, which in turn will drive the growth of the market. It is widely seen as the next-generation computing revolution in major vertical end-use markets such as the public sector, banking, financial services and insurance, healthcare, and retail.
- In 2018, 48% of Mexican businesses invested in cloud products and services. Of the companies that adopted this technology, 30% invested part of their IT budget in public clouds, and the remaining 18% invested in private clouds. In early 2020, Microsoft announced it would likely build its first cloud data center in Mexico over the next five years as part of a USD 1.1 billion investment in Mexico.
- Major companies providing cloud services in Mexico's cloud computing industry include Microsoft Corporation, Amazon Web Services, IBM Corporation, Accenture, Oracle Corporation, SAP SE, Google, Rackspace, Salesforce.com, and Telefonica. The purpose of these cloud service providers is to extend their service portfolio and existing delivery models, such as public and private cloud models, in order to offer comprehensive solutions to their customers.
- With the rise of the digital economy and the increasing number of Internet users in Mexico, the need for data storage and processing is increasing. The proliferation of hybrid cloud service providers has increased demand for colocation services and increased rack utilization.

Full rack segment to hold major share in the market

- Due to the growing shortage of space in various companies, the Mexico data center full rack market has a large share. The demand for complete rack data center infrastructure is increasing to accommodate the increasing rack size due to the rapid growth of mobile broadband networks due to the rise of big data analytics combined with cloud computing.
- With the introduction of 5G and the increasing use of smartphones, we need to ensure sufficient speed availability. As a result, the country has adopted cloud computing, increased the number of Internet users, and adopted fiber optic technology. With the introduction of such technologies and the increase in data usage, the use of full-rack data centers is increasing in the country.
- Initially, the focus was limited to rack space within the data center. Only size and cost were considered in the deployment. Nonetheless, data center rack space utilization is expected to continue to grow as users grow in various industries, such as online banking, telecommunications, media, entertainment, and other high-density applications.
- With large amounts of data generated daily, organizations rely on data centers to efficiently manage data and storage. Therefore, the increasing use of full-rack data centers is the most important factor that has a positive impact on data center rack consumption. This market is expected to exhibit potential growth, which could lead to the adoption of hyperscale colocation among important end-users in the cloud and telecom industries.
- The popularity of computing solutions in Mexico is a key factor driving the development of full-rack data centers in the country.

Mexico Data Center Rack Industry Overview

The Mexican Data center racks market is relatively low in terms of competition and has a few players in the market, such as Eaton Corporation, Black Box Corporation, Rittal GMBH & Co.KG, Schneider Electric SE, and Vertiv Group Corp. These major players focus on expanding their customer base in the country. These companies leverage strategic collaborative initiatives to increase their market share and profitability. The increase in the data center construction corresponds to increasing demand for the number of racks in the data centers.

In September 2022, the company, owned by America Movil, signed a deal to jointly provide Oracle Cloud Infrastructure (OCI) services to clients throughout Mexico. As part of the collaboration, TELMEX-Triara was the host organization for the second Oracle Cloud Region planned for Mexico. Telmex's data center division, Triara, has five locations in Queretaro, Monterey, Mexico City, Guadalajara, and Cancun, offering 74,000 square meters (796,500 square feet) of space.

In August 2022, Ascenty began operating in Mexico with the announcement of the inauguration of its first two locations. The two new data centers in the city of Queretaro required BRL 1 billion in total investment for their installation. Mexico 1 had a 20,000 m2 area with a total power of 21 MW, while Mexico 2 had a 24,000 m2 area and a capacity of 31 MW.

Additional Benefits:

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

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