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

Market Report | 2026-01-16 | 131 pages | Mordor Intelligence

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Report description:

Mexico Data Center Market Analysis

The Mexico Data Center Market was valued at USD 1.17 billion in 2025 and estimated to grow from USD 1.33 billion in 2026 to reach USD 2.53 billion by 2031, at a CAGR of 13.74% during the forecast period (2026-2031). In terms of IT load capacity, the market is expected to grow from 0.53 thousand megawatt in 2025 to 1.27 thousand megawatt by 2030, at a CAGR of 19.03% during the forecast period (2025-2030). The market segment shares and estimates are calculated and reported in terms of MW. Hyperscale commitments led by AWS (USD 5 billion) and Microsoft (USD 1.3 billion) are accelerating build-outs as U.S. cloud operators localize capacity to comply with Mexico's stringent data-residency rules. Queretaro anchors the first wave of expansion; however, water scarcity and grid volatility are prompting operators to diversify their edge sites in border and Gulf Coast cities. Renewable-energy incentives, including self-supply wind projects, are reducing long-term PUE costs and enhancing investor interest in sustainable footprints. Meanwhile, hybrid-cloud demand from manufacturers, media platforms, and 68.7 million gamers is intensifying the need for low-latency links to U.S. networks.

Mexico Data Center Market Trends and Insights

Surging Hyperscale Cloud Expansion by U.S. Tech Giants

AWS's USD 5 billion region, Microsoft's USD 1.3 billion AI hub, and Google Cloud's 2025 launch are reshaping the Mexico data center market by anchoring hyperscale footprints that dwarf traditional colocation investments. These rollouts unlock economies

of scale for fiber carriers and utilities while positioning Mexico as a near-shoring gateway for AI workloads that need sub-50 ms round-trip latency to U.S. users.The presence of all three cloud majors strengthens buyer confidence in sovereign-cloud compliance, spurring local SaaS adoption and edge build-outs. Manufacturing exporters are using these zones for real-time supply-chain analytics, boosting demand for adjacent colocation and interconnection space. The clustering effect around Queretaro is also elevating land prices, prompting operators to scout secondary corridors with equivalent fiber routes.

Rising Demand for Low-Latency Edge Nodes from OTT and Gaming Providers

Mexico's USD 1.2 billion gaming ecosystem relies on sub-20 ms latency, forcing service providers to deploy distributed micro-data centers across Tijuana, Monterrey, and Merida. OTT platforms are simultaneously localizing content following the 2024 digital media promotion scheme, driving cache nodes into Tier 2 cities. Edge rollouts favor facilities within 30 km of cable landing points or cross-border peering sites, where bandwidth costs are 18% lower than the average in Mexico City. The resulting micro-hub network complements core hyperscale regions, creating a two-layer topology in the Mexico data center market that optimizes both cost and latency. ISPs are monetizing this shift by bundling edge hosting with managed network services tailored for streaming and cloud-gaming workloads.

Grid Reliability Issues and Brownouts

Frequent voltage drops compel facilities to oversize UPS plants by 15% and diesel reserves by 36 hours, inflating capex and carbon footprints. Hyperscale builds exceeding 80 MW are queueing for dedicated substations, elongating delivery timelines by up to 18 months. Secondary cities with modern transmission upgrades, such as Monterrey, gain competitive traction over legacy hubs. Operators offset instability with modular gas-turbine arrays, though fuel hedging erodes cost savings from renewable PPAs. Persistent grid unreliability thus tempers the near-term growth outlook within the Mexico data center market despite robust demand.

Other drivers and restraints analyzed in the detailed report include:

Data-Residency Mandates in Fintech and Telecom SectorsRenewable-Energy Incentives Lowering PUE CostsHigh Water-Stress Zones Triggering Cooling Restrictions

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

Segment Analysis

Medium-scale facilities captured 12.48% of Mexico data center market share in 2025 as enterprises favored 5- to 15-MW halls that align with two-zone disaster-recovery layouts. Large-scale footprints are accelerating at 18.65% CAGR on the back of hyperscale self-builds that pursue economies of scale via 36-MW blocks. The Mexico data center market size for large facilities is therefore set to more than double by 2031 as cloud operators consolidate availability-zone capacity.

Consolidation drives better PUE but amplifies exposure to single-site utility risks, pushing site-selection toward dual-grid parcels or near-border solar corridors. Medium halls remain critical for latency-sensitive SaaS workloads that cannot tolerate long fiber back-hauls. The coexistence of both sizes indicates a barbell structure where hyperscale nodes coexist with localized distribution points for OTT delivery and industrial IoT streams.

Tier 3 inventories accounted for 83.20% of 2025 deployments, reflecting a historical preference for N+1 redundancy among enterprise colocation customers. Tier 4 builds, however, are growing at 19.15% CAGR as BFSI compliance frameworks and SLA-driven OTT platforms demand 2N fault tolerance.

Investment economics favor Tier 4 in regions where brownouts cost more than 4 minutes of outage per kVA annually. The Mexico data center market size attributable to Tier 4 halls is projected to triple by 2031, supporting mission-critical fintech workloads. Tier 2 edge pods serve caching and test-dev pipelines where cost sensitivity outweighs redundancy. This tier stratification forces operators to calibrate asset mix and pricing plans across campus-scale portfolios.

The Mexico 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, and More), and Hotspot. The Market Forecasts are Provided in Terms of IT Load Capacity (MW).

List of Companies Covered in this Report:

Telmex SA Cirion Technologies Ascenty (Digital Realty) Kio Networks Kyndryl Holdings, Inc. Odata Google LLC Oracle Cloud Equinix Inc. (Axtel) Vultr Mexico Telecom Partners Edgeuno Scala Data Centers MCM Telecom Marcatel

Additional Benefits:

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

Table of Contents:

5.5 By Hotspot
5.5.1 Guadalajara
5.5.2 Mexico
5.5.3 Rest of Mexico

6 COMPETITIVE LANDSCAPE
6.1 Market Concentration
6.2 Strategic Moves
6.3 Market Share Analysis
6.4 Company Profiles {(includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)}
6.4.1 Telmex SA
6.4.2 Cirion Technologies
6.4.3 Ascenty (Digital Realty)
6.4.4 Kio Networks
6.4.5 Kyndryl Holdings, Inc.
6.4.6 Odata
6.4.7 Google LLC
6.4.8 Oracle Cloud
6.4.9 Equinix Inc. (Axtel)
6.4.10 Vultr
6.4.11 Mexico Telecom Partners
6.4.12 Edgeuno
6.4.13 Scala Data Centers
6.4.14 MCM Telecom
6.4.15 Marcatel

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK
7.1 White-space and Unmet-need Assessment

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