

Mexico Residential Real Estate - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Mexico Residential Real Estate Market Analysis

Mexico Residential Real Estate Market size in 2026 is estimated at USD 49.03 billion, growing from 2025 value of USD 46.44 billion with 2031 projections showing USD 64.28 billion, growing at 5.57% CAGR over 2026-2031. Robust household formation, government-backed finance reforms, and nearshoring-driven employment gains are collectively reinforcing demand despite construction-cost headwinds. President Claudia Sheinbaum's National Housing Program, backed by MXN 600 billion (USD 32.4 billion) in federal spending, is set to inject 1 million new dwellings, strengthening affordable supply pipelines. Parallel INFONAVIT and CONAVI initiatives are widening credit access through rent-to-own schemes and capped salary deductions, nurturing both purchase and rental uptake. Developers are consolidating to scale production, while vertical projects in Mexico City, Monterrey, and Guadalajara are redefining urban living models.

Mexico Residential Real Estate Market Trends and Insights

Persistent Housing Deficit Sustaining Long-Term Residential Demand

Mexico's structural shortage of roughly 9 million units keeps demand elevated across every income tier. More than 57.3% of the current stock remains self-built, revealing extensive quality gaps. Workers earning one to two minimum wages-about 7.3 million people-face the sharpest access barriers, prompting INFONAVIT to launch Infonavit Constructora S.A. de C.V. in 2025 to start 20,000 centrally located homes. This supply push, paired with federal subsidies, is expected to accelerate deliveries and relieve

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backlog pressure.

Government-Backed Housing Finance Programs Improving Affordability and Access

February 2025 reforms froze balances on 2 million existing mortgages, capped salary deductions at 20% for loans and 30% for rent, and introduced social leasing that converts rent payments into equity. FOVISSSTE-INFONAVIT Unidos now lets public and private workers combine credits, lifting joint purchasing power. CONAVI's 2025 mandate funds 100,000 new dwellings and 100,000 upgrades across 1,345 municipalities, with 20% reserved for affordable rentals. These measures collectively lower entry barriers and reshape tenure preferences.

High Construction Costs Driven by Inflation, Import Dependence, and Supply-Chain Disruptions

Potential 25% U.S. steel and cement tariffs threaten input prices for builders reliant on cross-border trade. Although producers such as Cemex posted 6% net-sales growth and 14% EBITDA gains in 2024, project budgets remain sensitive to foreign-exchange pass-through and shipping delays. The 2021 Subcontracting Reform also raises compliance outlays but enhances labor protections, balancing cost burdens with social benefits.

Other drivers and restraints analyzed in the detailed report include:

Expanding Middle-Class Population Driving Demand for Mid- and Premium Housing
Urban Infrastructure Development Creating New Residential Growth Corridors
Lengthy Permitting Processes and Fragmented Regulatory Frameworks Delaying Project Execution

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

Segment Analysis

Sales retained a 73.55% share of the Mexico residential real estate market in 2025, reflecting entrenched ownership aspirations and subsidy-backed credit lines. The rental arm, however, is primed for a 5.93% CAGR through 2031 as social leasing spreads and digital platforms streamline listings. INFONAVIT's rent-to-own pilot links monthly rent to eventual equity, merging flexibility with long-term tenure goals. Expanded rental stock improves mobility for young professionals flocking to nearshoring hubs, enhancing labor-market efficiency.

Secondary resale homes further support liquidity, with many households favoring ready-to-occupy units in well-served districts. Nonetheless, the government's construction push will bring fresh inventory to market, gradually balancing the mix. PropTech-enabled screening and e-signatures are also shrinking vacancy times for landlords, underscoring the rental segment's structural tailwinds.

Apartments and condominiums secured 62.85% Mexico residential real estate market share in 2025 as density regulations and land scarcities channeled capital into high-rise formats. Tower complexes bundle green areas, retail, and coworking nodes, meeting modern lifestyle standards. Villas and landed houses, though smaller today, are slated for a 6.02% CAGR owing to expanding middle-class budgets and post-pandemic outdoor-space preferences.

Hybrid gated communities mixing towers and townhouses illustrate how developers are optimizing footprints while catering to diverse household structures. The government's emphasis on well-located sites with transit links continues to favor vertical infill, yet suburban parcels in Queretaro and Merida are gaining traction for low-rise build-to-sell projects.

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The Mexico Residential Real Estate Market Report is Segmented by Business Model (Sales, Rental), by Property Type (Apartments & Condominiums, Villas & Landed Houses), by Price Band (Affordable, Mid-Market, Luxury), by Mode of Sale (Primary New-Build, Secondary Existing-Home Resale), and by States (Mexico City CDMX, Nuevo Leon, Jalisco, Queretaro, Rest of Mexico). The Market Forecasts are Provided in Terms of Value USD.

List of Companies Covered in this Report:

Ruba Residencial ARA Consortium Grupo Jomer Grupo GP Grupo Lar Vinte Viviendas Integrales Grupo SADASI Grupo HIR Inmobilia Sordo Madaleno Aleatica Ideal Homie.mx Habi TrueHome Quiero Casa Desarrolladora Metropli Grupo Rocas Casas Krea Neximo PropTech

Additional Benefits:

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

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