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Mexico Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Mexico Data Center Market size is estimated at 357.8 MW in 2024, and is expected to reach 480.4 MW by 2029, growing at a CAGR of 6.07%. Further, the market is expected to generate colocation revenue of USD 4,590.2 Million in 2024 and is projected to reach USD 6,655.9 Million by 2029, growing at a CAGR of 7.71% during the forecast period (2024-2029).

Tier 1&2 data center accounted for majority share in terms of volume in 2023, and is expected to dominate through out the forecasted period

The tier 4 data center segment is expected to reach an IT load capacity of 204.30 MW in 2023. It is further projected to exhibit a CAGR of 9.53%, surpassing an IT load capacity of 352.76 MW by 2029.

While tier 1 and 2 facilities must be increasingly equipped to meet the growing demand for uninterrupted services from businesses, they are losing favor. Due to the increase of business continuity services available around the clock, tier 3 and 4 data centers have gained popularity. This is due to the increasing number of conglomerates. A tier 3 data center is equipped with several channels for electricity and cooling, as well as methods for updating and maintaining it without bringing it offline. It has an annual downtime of 1.6 hours and an expected uptime of 99.982%. Because of the significantly better redundancy protections provided, small and medium-sized businesses typically choose to employ at least a Tier III-rated system.

A tier 4 data center includes redundancy for every component and is fault-resistant.

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Clients should not face more than 26.3 minutes of downtime a year, according to a level 4 facility. Government organizations and major corporations with mission-critical servers and high customer or business demands typically use a tier 4 facility. The growth of data centers in Mexico with the best infrastructure certifications is facilitated by the entry of significant international corporations and an increase in the country's enterprises. Throughout the forecast period, the market is anticipated to demonstrate potential growth, which may lead to hyperscale colocation adoption by significant end users in the cloud and telecom industries. The popularity of computer solutions in Mexico is a key encouraging element for the development of tier 4 facilities.

Mexico Data Center Market Trends

Launch of 5G services and investment by telecom providers to enhance network coverage to boost the market growth

The total data traffic per smartphone in the country was 9.5 GB in 2022 and is expected to witness a CAGR of 21.45% during the forecast period to reach a value of 40.12 GB by 2029.

On average, Mexicans spend more than 7 hours a day online, owing to a steady rise in internet usage each year. Additionally, Mexico's internet usage has surged due to the state-wide 5G launch at the beginning of 2022. Similarly, over the past few years, the government and major telecom providers have invested millions of pesos, which has enhanced network coverage in rural areas. More than 74.87% of Mexicans who owned a mobile phone in 2022 used it to access the internet through a browser or an app. Around 88.77% of mobile users in the nation are anticipated to have access to the internet through their mobile devices by 2027.

The average internet user in Mexico will generate 28.9 Gigabytes of monthly internet traffic in 2021, up from 17.1 Gigabytes in 2016. In addition, 94.4 Gigabytes of internet traffic were produced monthly by the typical internet home in 2021, up 65% from 57.2 Gigabytes in 2016. This comparison and a huge increase in data traffic are expected to increase the number of racks in the existing data center facilities during the forecast period.

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Adoption of 5G network to boost market growth

The total number of smartphone users in the country was 90.41 million in 2022 and is expected to reach a value of 108.56 million by 2029, recording a CAGR of 3.10% during the forecast period.

In 2020, smartphone data usage per month in Mexico was 5.5 gigabytes, and it is expected to reach 28.4 gigabytes per month by 2026. The most recent wireless broadband cellular technology employed by network operators is the 5th generation (5G) in the country. It was anticipated that 39% of Mexican mobile customers would switch to a 5G network as soon as it was fully accessible in their area. Despite this willingness, many people still view adopting this technology as a luxury because it requires purchasing new devices that support 5G. In actuality, less than 10% of Mexicans had a 5G mobile network at the time.

In Mexico, 97% of internet users access the internet through a smartphone, compared to 32% who use laptops and desktop computers. This has positively influenced the development of the BFSI, media, and entertainment sectors, as well as the e-commerce sector, where a sizable amount of data has been generated. The most popular website, with 93.4% of visits, is Facebook. On the other hand, 80.5% of Mexicans used Facebook Messenger. TikTok came in sixth, with 70.4% of users in the area, and Instagram came in second with 79.1%. This shows there is huge penetration of smartphones in the country, primarily requiring data centers for storage since they require real-time processing on enormous data chunks. Such positive growth of smartphones in the country is expected to lead to an increase in the number of data centers during the forecast period.

Mexico Data Center Industry Overview

The Mexico Data Center Market is fairly consolidated, with the top five companies occupying 66.13%. The major players in this market are CloudHQ, Equinix Inc., KIO Networks, MetroCarrier (Megacable Holdings SAB de CV) and Telmex (American Movil) (sorted alphabetically).

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