



Mexican Strategic Landscape

Monthly Report - January 2025



The Institute
for Strategy &
Defense Research

What is The Mexican Strategic Landscape Report?

A monthly publication by the Institute for Strategy and Defense Research (ISDR), a think tank dedicated to the analysis and the dissemination of information in key topics which address Mexico's problems and structural challenges. This document provides insights from the six different regions that make up the country.



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Regions of Mexico



Trends to watch in Mexico

01 / Local government ties with cartels exposed in security operations.

The federal Secretariat of Security and Citizen Protection has carried out various operations in recent months in Mexico to combat corruption and collusion of local authorities with criminal groups. In the State of Mexico, several officials, including mayors, security directors and police officers from 10 municipalities, were arrested for their criminal ties. While in Chiapas, the mayor of the municipality of Frontera Comalapa was arrested, who in addition to having criminal ties is also accused of forced disappearance, homicide, extortion, and misappropriation of public resources. Dismantling institutional protection is a fundamental aspect of combating criminal organizations, but if it is not accompanied by strengthening local capacities, the power vacuum could quickly be filled by another criminal organization.

02 / Mexico's aid to Cuba.

The Cuban regime has managed to stay afloat thanks to the help of several governments in the region such as Venezuela and Mexico. In recent years, Mexico has hired more than 3,500 Cuban doctors, purchased tons of ballast from Cuba for the construction of the Mayan Train, and crude oil exports to the island grew in 2024. These actions have not only helped the Cuban regime economically, but they have also allowed it to face the serious energy crisis that affected the country after Hurricane Oscar passed in October of last year. However, in the face of the next US Administration, this aid could also have negative repercussions for Mexico. The case of PEMEX (state oil company) should not be overlooked, as it could be also subject to economic sanctions.

03 / Mexican businessmen prepare for USMCA review.

Prior to the USMCA review next year, Mexican business chambers are preparing various forums that will take place between January 13 and 17 of 2025 in the northern cities of: Matamoros, Monterrey, Ciudad Juárez, Tijuana and Nogales. The objective of these forums is to promote the economic development of border regions and improve collaboration with companies from the US and Canada. It will be important for business leaders and the Mexican government to unify forces and promote an economic project that benefits the country and is aligned with new global trends and challenges.

Mexico and the Global Stage

Mexico's ambiguity towards the Venezuelan crisis.

After the electoral fraud that occurred in July 2024 in Venezuela, Mexico lost a historic opportunity to be a relevant actor in promoting the democratic transition in Venezuela. Although Mexico initially published a joint statement with Brazil and Colombia to request the publication of the electoral records, the measure was insufficient and a more forceful position was expected from Mexico, in line with its position and weight in the region.

Northwestern

Regional Overview

01 ——— Drought persists throughout the region.

Northwestern Mexico has suffered from an extended drought that has affected crops and water availability. 2024 was the driest year in this century for Baja California Sur, with 90% of its territory under extreme drought. In Sonora, wheat in 2025 is expected to yield only 15% of its normal production due to the lack of water. As of the end of last year, 100% of Chihuahua's territory has been drought-stricken. Sinaloa, Mexico's top crop producer, is also suffering from the hardest drought in half a century. This situation proves a challenge for water access and food production. In the resort town Los Cabos, while tourists dive into pools and relax in all-inclusive resorts, the local population refer to water access as a privilege not available to all. The continuation of the drought will reveal social cleavages, economic troubles, and crises in crop production. In the coming years, drought conditions are only expected to increase.

02 ——— New methods to recruit minors and students into organized crime.

Violence in Sinaloa has exposed new methods for recruitment of minors into organized crime. A New York Times investigation revealed that chemistry students are contacted within the university campus by drug cartel recruiters to offer them jobs as fentanyl cooks for the cartel's production. Mobile video games have also been identified as a point of recruitment for minors. The inclusion of minors, both voluntarily and by force, into the structure of organized crime as cooks, messengers, and lookouts seems to be a growing trend in the country. Authorities have the challenge to prevent recruitment not only through traditional means but also in a virtual ecosystem. While criminal charges for minors represent reduced sentences and recruitment becomes an option for status, money, and social acceptance, new strategies are needed to thwart current recruitment techniques.

Key Actors

Crop production in Sinaloa.

Between 2023 and 2024-2025 the number of hectares of maize crops decreased by 83%. Additionally, only half of the irrigated arable lands in the state have any type of crop during this season. These numbers are due to the lack of available water for irrigation. The state's largest dam "Luis Donaldo Colosio", located in Choix, has a current water capacity of 1.7%. In 2025, this situation will have dire consequences.

Northeastern

Regional Overview

01 — Air pollution in Monterrey.

The Monterrey metropolitan area is among the most polluted in the country. In 2024, the city registered the highest concentration of PM2.5 particles of the last five years. The concentration of both PM2.5 and PM10 particles usually doubles the acceptable quantity by health standards. The efforts of media, NGOs, and local governments have been directed towards the Cadereyta refinery, owned by Pemex. This month, Claudia Sheinbaum announced that the Tula thermoelectric plant will start replacing the use of fuel oil with natural gas to reduce emissions. Meanwhile, the refinery in Cadereyta reported the largest production of fuel oil, which releases sulfur and PM2.5 particles, since 2004. Urgent actions are needed to control pollution levels in the city and, while announced as part of the president's national strategy, concrete actions in the city are still due to be seen. As time goes by, pressure on authorities rises.

02 — New records for fuel theft.

While clandestine fuel tapping is more common in some regions of the country, in 2024 Nuevo León broke a new record. From 2021 to 2024 illegal fuel tapping equaled 44.2% of the registered cases since 2000. With data available as of September, the state counted 603 cases in the year, a new record, positioning Nuevo León among the top five states. The fight against "huachicoleo" was one of the main public policies of the presidency of Andrés Manuel López Obrador. During Claudia Sheinbaum's first months, other policies have become more relevant. Nonetheless, illegal fuel intake has been on the rise and authorities will have to react. The expansion of this illegal activity to states where it was normally uncommon is sounding the alarms at the national level.

Key Actors

PEMEX Cadereyta Refinery.

Located 36 km from downtown Monterrey, in the municipality of Cadereyta, Nuevo León, this is PEMEX's third largest refinery, by total production, after Tula and Salina Cruz. Inaugurated in 1979, the 767 hectares refinery has a total production capacity of 275,000 daily oil barrels. Producing diesel and gasoline, the refinery has taken center stage at the public debate concerning the negative effects on health caused by its pollutants and emissions.

Western-Bajío

Regional Overview

01 ——— **Querétaro consolidates as a data center hub.**

The state of Querétaro has an installed capacity of 111 megawatts in its 21 data centers. Additionally, of the 73 data center projects planned for the country through 2029, half are expected to be built in Querétaro. Just last year, Microsoft inaugurated a new data center and has now announced plans for its expansion. Querétaro is the state with the largest number of data centers and its installed energy capacity makes it number 14 worldwide. In order to continue growing as a data center hub, the state will have to guarantee energy production, which is used in large quantities in this type of industry.

02 ——— **Guanajuato leads the national ranking of insecurity impacts to businesses.**

According to the National Survey of Business Victimization (ENVE), Guanajuato is the state with the biggest impact of violence and insecurity in economic activity. In its newest study, accounting for 2023, businesses in Guanajuato lost US\$ 680 million as a consequence of the impacts of insecurity. Among the main causes are reduced opening hours, diminishing cash transactions, and paused investment plans. Causing increased costs in security measures such as alarms and monitoring systems, new locks, and private security. In addition, Guanajuato has reported the highest number of police killings in the country for the sixth year in a row. In spite of this, the state is still an economic powerhouse and continues to receive foreign investment. Its potential is limited by insecurity concerns, which, if unattended, will have broader impacts on economic activity.

Key Actors

Microsoft's Querétaro Data Center.

After announcing plans for its construction in 2020, Microsoft's data center was inaugurated in May 2024. At least US\$ 1.1 billion was invested in the data center located in the municipality of Colón, close to Querétaro's International Airport. In a second phase, Microsoft will be investing around US\$ 1.3 billion in the data center as part of its expansion plans.

Central

Regional Overview

01 ——— National Guard's new operation to combat cargo theft.

The National Guard launched the "Balam Strategy" to combat cargo theft across 12 high-incidence states, including the State of Mexico, Puebla, and Veracruz. The initiative, active since October, introduces an app for transporters with an emergency button for rapid response, an "Immediate Action Hotline" to directly connect transport organizations affiliated to COPARMEX with authorities and increases the presence of drones and helicopters in highways. Complementing these measures is the ongoing "Operativo Escalón," which provides escorted protection on key routes. Starting in 2025, transport units in CANAPAT will also display vehicle registration on all sides to expedite stolen vehicle identification. This cooperation between commerce chambers and authorities is not only reducing economic losses and improving highway safety but is also continuously generating valuable intelligence for authorities on key criminal hotspots, enhancing long-term operational effectiveness.

02 ——— Femicides during 2024.

Official data from the Secretariado Ejecutivo del Sistema Nacional de Seguridad Pública reveals that 2024 recorded the lowest femicide rates in the past eight years, with a 12% decrease from 2023. However, this decline is not consistent nationwide. Mexico City, Guerrero, Morelos, Tlaxcala, and Puebla reported more cases compared to the previous year. Per capita, Morelos leads nationally with 4.55 cases per 100,000 women, reflecting an all-time high and a concerning sustained increase over time. While the national decline in femicide rates is encouraging, the stark regional disparities highlight the urgent need for targeted interventions in high-risk states. Moreover, discrepancies between official statistics and data from civil organizations and international groups highlight contrasting realities, calling for improved coordination on measuring and transparency on efforts to classify missing persons and unresolved cases as femicides.

Key Actors

Key Highways for the Balam Strategy.

The initiative focuses on highways in the states of Michoacán, San Luis Potosí, Jalisco, Morelos, Nuevo León, Guanajuato, Querétaro, State of Mexico, Hidalgo, Tlaxcala, Puebla, and Veracruz.

Southern

Regional Overview

01 — Operation "Enjambre" Expands to Chiapas and Oaxaca.

The federal government's Operation "Enjambre" has extended its reach to additional states, intensifying actions against corruption and criminal activity within municipal and state authorities. In Chiapas, the arrest of the mayor of Frontera Comalapa for corruption marks a significant milestone, with further investigations underway into allegations of forced disappearances, extortion, and homicide. This operation remains driven by coordinated efforts between federal and local authorities, including the strategic involvement of Chiapas's new governor's specialized taskforce, Pakal. Meanwhile, parallel efforts in Oaxaca showcase the operation's regional scope, though no high-profile arrests have been reported to date.

02 — Tabasco emerges as the new cartel battlefield.

Tabasco has transformed into a violent battlefield as the confrontation between the CJNG and the fragmented La Barredora cartel escalates, driving a 353% surge in homicides and setting a record of 894 victims in 2024. The fallout of this conflict has reached the general public through mass shootings, targeted attacks on officials, and public displays of cartel power. While Governor Javier May Rodríguez has launched security operations and arrests, the escalating cartel war in Tabasco mirrors the early stages of violence seen in other conflict-ridden regions, exposing deeper structural failures in governance and security. Addressing this crisis requires a coordinated, multi-level approach that transcends state intervention to prevent further erosion of the rule of law and restore public trust.

Key Actors

Pakal taskforce.

The Fuerza de Reacción Inmediata Pakal (FRIP) is an elite tactical unit launched under the leadership of Governor Eduardo Ramírez Aguilar in Chiapas to combat escalating violence and insecurity. Comprising 500 specialized personnel equipped with armored vehicles, drones, and a helicopter, FRIP is a cornerstone of the governor's strategy to restore peace and tackle organized crime in the region.

Yucatán Peninsula

Regional Overview

01 ——— **Quintana Roo’s paradise overshadowed by gender-based violence rates.**

Gender-based violence (GBV) in Quintana Roo, particularly in Cancún, continues to escalate, with the state ranking third nationally for sexual abuse cases in 2024 at 54.7 per 100,000 inhabitants and first in human trafficking with a rate of 6.7 cases. Many crimes remain unreported due to fear of reprisals and a justice system criticized for revictimization, contributing to a significant “dark figure” that hides the true scope of violence. Additionally, crimes such as kidnapping and robbery often include elements of sexual violence but fail to account for these as aggravating factors in official records. Despite being one of Mexico’s top tourist destinations, Quintana Roo lacks a comprehensive strategy to address GBV effectively, leaving victims without adequate support. Tackling this crisis requires not only reducing crime rates but also reforming institutions to ensure adequate responses, accurate documentation, and long-term prevention measures that restore trust in the justice system.

02 ——— **Trump’s tariff threats spreads fear among manufacturers in Yucatán.**

The threat of a 25% tariff on Mexican exports proposed by U.S. President-elect Donald Trump, endangering the maquiladora industry—a key economic driver across multiple states—continues to fuel national concern. In Yucatán, where maquiladoras account for 23.1% of the state’s GDP (2019), commerce chambers have declared the urgency for negotiations to mitigate potential impacts. With 76% of production destined for the U.S., industries such as textiles, jewelry, and even animal products are at risk of severe disruption. Local manufacturers have begun implementing strategies, including early exports and renegotiations with U.S. clients, to cushion the blow. This adds mounting pressure to the upcoming 2026 USMCA renegotiations, where securing trade stability will be critical for all states, even where manufacturing is not the primary economic driver.


Key Actors


Gender-violence crime rates in Cancún in 2024.

Cancún, Quintana Roo’s main tourist destination, reports alarming gender-related crime rates per 100,000 citizens, often doubling the national average: 56.1 cases of sexual abuse (national: 25.7), 10.1 of human trafficking (national: 0.5), and 36.1 of rape (national: 11.3).


Contact


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 Institute for Strategy and Defense Research - ISDR

 InstituteSDR

 isdr.mx

 info@isdr.mx

 +52 (81) 8363 0021



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