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Report Highlights:

Mexico is forecast to enter 2027 with modest improvements in livestock productivity, expanded processing capacity, and continued growth opportunities for the beef and pork sectors. While the outbreak of New World screwworm (NWS) has disrupted traditional livestock trade flows, it has also led to adjustments in meat production and supply chains. The calf crop is forecast to increase 1 percent as retained heifers reach reproductive maturity, supporting marginal herd expansion. Beef production is forecast to remain flat as market-ready cattle continue to enter slaughter channels, supporting commercial beef output. Following recent disease challenges, the swine sector is expected to continue recovering, with improved herd productivity and production efficiency supporting a 3 percent increase in commercial slaughter and higher pork output.

Cattle

Table 1: Cattle – Production, Supply, and Distribution (PSD)

Animal Numbers, Cattle Market Year Begins Mexico	2025		2026		2027	
	Jan 2025		Jan 2026		Jan 2027	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stks (1000 HEAD)	17,965	17,965	18,995	18,995	0	19,490
Dairy Cows Beg. Stocks (1000 HEAD)	3,700	3,700	3,750	3,750	0	3,800
Beef Cows Beg. Stocks (1000 HEAD)	8,100	8,100	8,300	8,300	0	8,450
Production (Calf Crop) (1000 HEAD)	8,400	8,400	8,400	8,400	0	8,500
Total Imports (1000 HEAD)	38	38	10	10	0	10
Total Supply (1000 HEAD)	26,403	26,403	27,405	27,405	0	28,000
Total Exports (1000 HEAD)	229	229	0	45	0	150
Cow Slaughter (1000 HEAD)	1,445	1,445	1,600	1,600	0	1,625
Calf Slaughter (1000 HEAD)	315	315	325	325	0	325
Other Slaughter (1000 HEAD)	5,100	5,100	5,625	5,600	0	5,625
Total Slaughter (1000 HEAD)	6,860	6,860	7,550	7,525	0	7,575
Loss and Residual (1000 HEAD)	319	319	345	345	0	345
Ending Inventories (1000 HEAD)	18,995	18,995	19,510	19,490	0	19,930
Total Distribution (1000 HEAD)	26,403	26,403	27,405	27,405	0	28,000
(1000 HEAD)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data

Note: *The report forecast reflects animal disease policies/restrictions and trade policies in place as of July 31, 2026, and assumes their continuation. Export projections assume cattle movement operations through the Douglas, AZ port of entry.*

Production

2027

Calf crop production is forecast to increase 1 percent to 8.5 million head in 2027. The previous suspensions of live cattle exports to the United States due to NWS has disrupted Mexico's historical ranching model. Traditionally, producers in northern Mexico operated a low-overhead, high-turnover system, breeding calves for export to U.S. feedlots. With the previous nationwide ban on live cattle exports to the U.S. market, Mexican producers are expected to increase resources towards domestic feeding infrastructure, allowing cattle to be retained and finished locally. This shift is also expected to provide producers with greater control over animal nutrition and health throughout the production cycle, improve herd management and survival rates, and support marginal growth in calf crop production.

2026

Calf crop production is estimated to remain flat at 8.4 million head in 2026. Successive droughts, disease outbreaks, and record live cattle exports to the United States in 2024 have significantly reduced the national breeding herd and therefore, the country's reproductive capacity.

Despite increased slaughter, producers in Mexico are retaining select heifers to rebuild breeding herds over the next two to three years. By incorporating improved genetics during this transition, producers are expected to enhance herd productivity.

Slaughter

2027

Slaughter is forecast to rise 1 percent to 7.6 million head in 2027. Reduced access to the U.S. live cattle export market has removed Mexico's primary avenue for exports, leaving approximately one million additional cattle available for domestic feeding and slaughter. This increased supply is expected to improve utilization of Mexico's processing infrastructure, enabling packers to operate more efficiently, expand throughput, and optimize production schedules.

2026

Slaughter is estimated to increase 10 percent to 7.5 million head in 2026. The estimated increase in cattle slaughter in 2026 reflects the effects of the 2025 suspension of live cattle exports to the United States due to NWS. The export suspension left more than one million head of cattle in Mexico that had been intended for U.S. feedlots. Rather than marketing these animals into a less profitable domestic market, many producers retained them on feed in anticipation of the border reopening. As a result, fewer cattle were slaughtered in 2025, creating a backlog of market-ready animals that are estimated to support higher slaughter in 2026 as rising holding cost encourages producers to market these animals through domestic feedlots.

Trade

Imports

2027

Cattle imports are forecast to remain unchanged at 10,000 head in 2027. Ongoing NWS-related animal health measures, including movement restrictions, quarantine requirements, and inspection protocols implemented by SENASICA, are expected to continue limiting live cattle imports. Historically, Mexico's live cattle imports relied on sourcing young calves from Central America, mainly Nicaragua, at low prices. However, the post-NWS sanitary requirements have dramatically increased the financial and administrative burden of importing cattle, slowing down the pace of imports

2026

Cattle imports are estimated to decrease by 74 percent to 10,000 head in 2026. This significant reduction is largely attributed to widespread opposition from northern ranching groups, who raised concerns about animal health risks associated with imported cattle. In response, Mexico instituted stringent sanitary requirements following the emergence of NWS, which rendered live cattle imports from Central America economically unfeasible for most producers

Exports

Note: *The report forecast reflects animal disease policies/restrictions and trade policies in place as of July 31, 2026, and assumes their continuation. Export projections assume cattle movement operations through the Douglas, AZ port of entry.*

2027

Cattle exports are forecast to increase 233 percent to 150,000 head in 2027. The August 2026 reopening of the Douglas, Arizona port of entry is forecast to support increased cattle exports. However, operational and supply chain constraints may limit volumes from returning to pre-closure levels. While market demand remains strong, export capacity is constrained by enhanced animal health protocols requiring veterinarians to conduct individual inspections for wounds and potential screwworm infestations. These procedures are more time-intensive than previous visual lot-based inspections, creating a limit on daily processing capacity. Prior to the outbreak, the Douglas port of entry handled approximately 16 percent of all Mexico's live cattle exports.

Additional requirements, including organophosphate dipping and mandatory holding periods at Pre-Export Inspection Facilities (PIFs), may create processing backlogs. Even with sufficient cattle availability in Agua Prieta, export volumes will ultimately depend on inspection throughput, facility capacity, and compliance with biosecurity requirements. Exporters are also expected to apply additional internal self-screening measures, reducing the number of cattle presented for export.

The delayed movement of lightweight feeder calves may further limit export recovery. Calves typically exported at 300 to 400 pounds may gain additional weight while awaiting clearance, potentially reducing their attractiveness to U.S. backgrounders seeking lighter feeder cattle. Heavier animals may no longer command the same premium and instead be directed toward domestic finishing operations in Mexico.

2026

Cattle exports are estimated to decrease 80 percent to 45,000 head in 2026. Adjusting to NWS restrictions, ranchers in northern states such as Chihuahua, Coahuila, and Tamaulipas have shifted from rapid-turnover breeding operations focused on exporting lightweight calves to domestic finishing systems, with retained cattle moving into Mexican feedlots for grain-based finishing through slaughter.

The economic conditions of exporting lightweight feeder cattle have changed significantly for Mexican producers following the implementation of enhanced animal health requirements. Exporters must now absorb additional costs associated with mandatory holding periods at certified PIFs, including feed, water, yardage, handling, and required parasite treatments. These requirements increase the cost of preparing cattle for export and reduce producer margins, which is estimated to dampen export expectations despite port capacity at Douglas, AZ.

Additionally, export eligibility requirements limit sourcing flexibility by restricting shipments to cattle born and raised in USDA-approved low-risk areas, including Sonora. This prevents exporters from sourcing feeder cattle from other regions to assemble export lots, reducing available supply and limiting the ability to quickly scale exports.

Beef

Table 2: Beef – Production, Supply, and Distribution (PSD)

Meat, Beef and Veal Market Year Begins Mexico	2025		2026		2027	
	Jan 2025		Jan 2026		Jan 2027	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference) (1000 HEAD)	6,860	6,860	7,550	7,525	0	7,575
Beginning Stocks (1000 MT CWE)	0	0	0	0	0	0
Production (1000 MT CWE)	2,170	2,170	2,410	2,410	0	2,420
Total Imports (1000 MT CWE)	339	339	310	320	0	310
Total Supply (1000 MT CWE)	2,509	2,509	2,720	2,730	0	2,730
Total Exports (1000 MT CWE)	324	324	400	400	0	500
Human Dom. Consumption (1000 MT CWE)	2,185	2,185	2,320	2,330	0	2,230
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	2,185	2,185	2,320	2,330	0	2,230
Ending Stocks (1000 MT CWE)	0	0	0	0	0	0
Total Distribution (1000 MT CWE)	2,509	2,509	2,720	2,730	0	2,730
(1000 HEAD) ,(1000 MT CWE)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data.

Production

2027

Beef production is forecast to remain flat at 2.4 million metric tons (MMT) carcass weight equivalent (CWE) in 2027. While the estimated increase in beef production in 2026 was driven by a backlog of retained cattle, the forecasted 2027 production reflects the continued shift toward domestic feeding and in-country slaughter.

Mexican feedlot operations in 2027 are forecast to stabilize following the supply chain adjustments of the previous two years. As more cattle are retained for domestic feeding rather than exported live, Mexico is expected to continue increasing beef production and exports. Continued contraction of the U.S. cattle herd is expected to sustain demand for imported beef, while greater availability of market-ready cattle in Mexico will support higher slaughter volumes and export opportunities, particularly to the United States and Asian markets.

2026

Beef production is estimated to rise 11 percent to 2.4 MMT CWE in 2026. Cattle retained following the 2025 border closure, which normally would have been exported at lighter weights (175-225 kg), remained in domestic feedlots for additional months. The additional feeding period is expected to increase average carcass weights, as animals are sent to slaughter at 500-550 kg, resulting in greater beef production per animal.

The increase in production is expected to be temporary, reflecting the processing of cattle retained following the prior year's border closure. Once this backlog is reduced, production is expected to align more closely with domestic cattle inventories and annual calf crop production.

Consumption

2027

Beef consumption is forecast to decrease by 4 percent, reaching 2.2 MMT CWE in 2027. High beef prices lead households and food processors to substitute beef with lower-cost animal proteins, such as pork and poultry. Domestic pork production and imports offer a price-competitive alternative, capturing market share from beef in both retail and institutional channels.

Moderating GDP growth and reduced real wage expansion constrain discretionary consumer spending, weakening demand in high-end retail, food service, and hospitality sectors.

The growth of Quick Service Restaurant (QSR) chains and fast casual franchises has impacted dining preferences in high-end urban areas. As these commercial networks have expanded their supply chains to accommodate international travelers, they have become increasingly influential in shaping local eating habits. Their operational scale and ability to serve large volumes have positioned them as key drivers of demand for processed beef products.

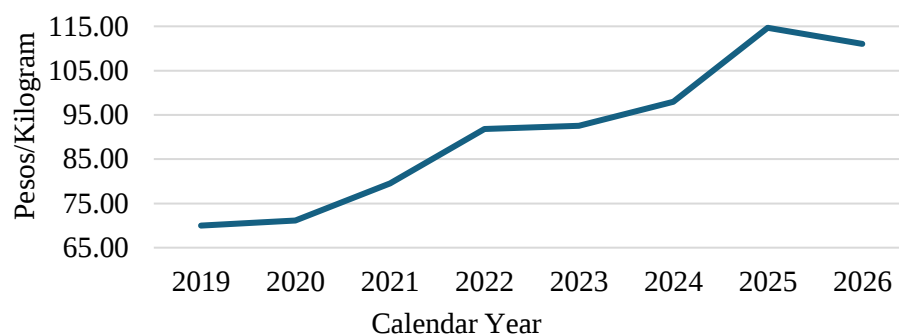
Looking ahead to 2027, these QSR and fast casual franchises are expected to sustain substantial, contract-backed demand for high-volume processed beef items, such as burger patties and taco meats. Their continued presence in urban markets will reinforce the consumption of processed beef, ensuring a relative stable demand for these products within both domestic and international supply chains.

2026

Beef consumption is estimated to rise 7 percent, reaching 2.3 MMT CWE in 2026. Growth is supported by increased demand from the HRI sector amid elevated tourism activity. While initial projections were tempered by FIFA World Cup visitor figures coming in 40 percent below pre-tournament expectations, tourism activity continued to provide support to food service demand. Foreign exchange earnings from tourism increased in early 2026, and food service activity during the tournament contributed to continued demand for beef products in major urban centers.

Easing general inflation is expected to strengthen household purchasing power across Mexican urban centers, allowing consumers to allocate more discretionary income toward animal proteins. Simultaneously, price softening in domestic beef, driven by an influx of retained feeder cattle into local feedlots, is expected to make red meat more accessible relative to its previous highs.

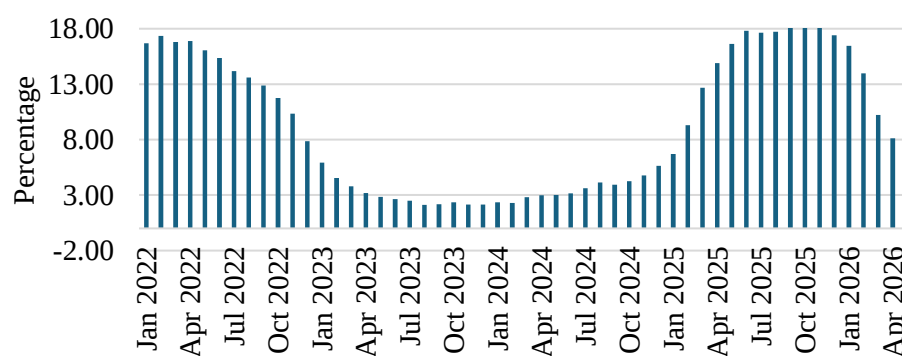
Figure 1. Mexico Beef Carcass Prices Annual Trend (pesos per kg)



Note: 2026 Data is January to June

Source: Post estimate with data from Agricultural and Fisheries Information Service (SIAP)

Figure 2. Mexico's Beef Price Inflation



Source: National Institute of Statistics and Geography (INEGI)

Trade

Imports

2027

Beef imports are forecast to decrease 3 percent to 310,000 MT CWE in 2027. Retained feeder cattle that were unable to move through export channels at the U.S. border during the prior marketing year were increasingly redirected to domestic feedlots and slaughter channels. As a result, Mexican processors, retailers, and foodservice operators were able to meet a greater share of demand through locally harvested beef rather than relying on higher-cost imports. Elevated U.S. wholesale beef prices also reduced the competitiveness of imported boxed beef relative to domestic supplies available from northern and central Mexican packing plants.

2026

Beef imports are estimated to decrease 6 percent to 320,000 MT CWE in 2026. This decline is driven by large domestic supplies, tight U.S. beef inventories, trade policy measures, and escalating international logistics costs.

Mexico removed beef from the broad Presidential Anti-Inflation Decree (PACIC) duty exemptions starting in 2026. In its place, the government established a 70,000 MT tariff-rate quota (TRQ) for non-FTA countries like Brazil. Once imports exceed this annual cap, standard out-of-quota tariffs apply, curbing duty-free access and reducing the price advantages that South American exporters previously enjoyed. Furthermore, Mexican food safety authorities (SENASICA) maintain intensive sanitary inspections on South American product to mitigate pest and foot-and-mouth disease risks. These regulatory adjustments are likely to remove the prior price competitiveness that Brazilian exporters usually rely on.

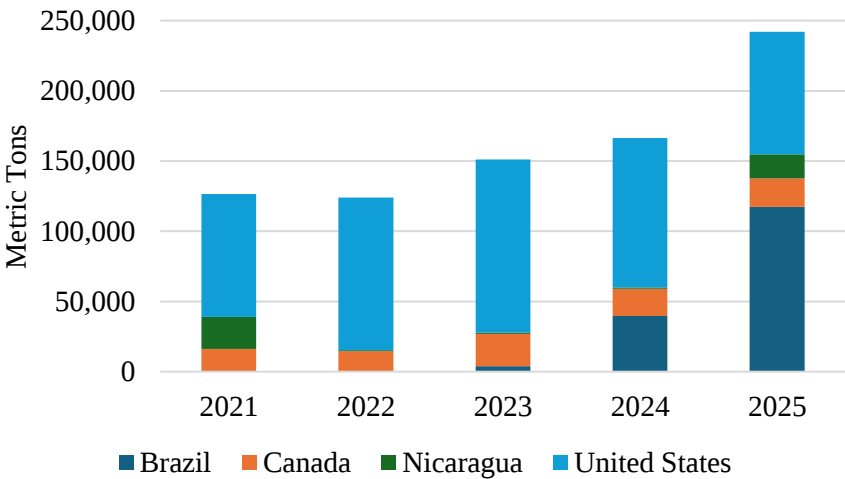
Animals diverted into local feedlots are hitting Mexican processing lines at higher finished weights. With domestic beef production increasing, wholesale markets are adjusting to higher product availability. Local beef prices are softening gradually, making domestic product more competitive and replacing lower tier processing meat that Mexico would normally import from overseas.

Table 3. Average Wholesale Values for Beef Products, pesos per kilogram (MXN/kg)

Category / Product Cut	2024 Average	2025 Average	2026 (YTD / Projected)	YoY Change (2025 vs 2026)
Beef Carcass	\$75.50 – \$80.00	\$88.00 – \$94.00	\$82.00 – \$86.00	-7.4%
Diezmillo (Chuck Roll)	\$197.00	\$257.00	\$242.00 – \$248.00	-4.5%
Bistec / Pulpa (Round / Steak Cut)	\$159.00	\$223.00	\$210.00 – \$215.00	-4.7%
Costilla (Rib / Ribeye Cuts)	\$220.00	\$258.00	\$245.00 – \$250.00	-3.8%
Recortes (Trimmings 80/20)	\$149.00	\$152.00	\$144.00 – \$148.00	-3.9%

Source: Post with data from National System of Market Information (SNIIM)

Figure 3. Mexico’s Beef Imports by Origin, MT



Source: Trade Data Monitor (TDM)

Exports

2027

Beef exports are forecast to rise 25 percent to 500,000 MT CWE in 2027. The U.S. commercial cattle inventory continues to contract, with domestic beef production forecast to decline in 2027. Reduced cattle supplies and elevated beef prices are expected to support continued demand for imported beef, providing additional opportunities for Mexican suppliers.

Considering the continued border closure of most ports of entry into the United States for Mexican live cattle, Mexico's industry organizations and TIF plants are forecast to continue to expand their commercial targets. Mexican packers are likely to capture high end hotel and restaurant sector market shares in the United States and Japan, replacing tightening U.S. export availability and outcompeting high-priced Australian alternatives.

2026

Beef exports are estimated to rise 23 percent to 400,000 MT CWE in 2026. This expansion is driven by the convergence of tight international supplies and changes in North American livestock handling. The United States is currently navigating a cattle inventory contraction, causing a decline in available supplies from American packers, pushing domestic beef and cattle prices to highs. To fill this vacuum, major U.S. packers are sourcing high-quality cuts from across the border, drawing heavy volumes of Mexican product into the U.S. supply chain.

Despite the recent opening of the Douglas, AZ port for live cattle exports, overall live cattle exports will likely remain bottlenecked due to health protocols and supply chain challenges. With the traditional pipeline of over one million live feeder calves still largely retained, Mexican producers continue to finish a significant share of light calves in local feedlots for domestic TIF processing. This ongoing operational switch allows Mexico to capture higher domestic processing margins and expand boxed beef production rather than relying strictly on live calf exports.

Swine

Table 3: Swine – Production, Supply, and Distribution (PSD)

Animal Numbers, Swine Market Year Begins Mexico	2025		2026		2027	
	Jan 2025		Jan 2026		Jan 2027	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Beginning Stocks (1000 HEAD)	16,532	16,532	16,725	16,725	0	17,090
Sow Beginning Stocks (1000 HEAD)	1,195	1,195	1,205	1,205	0	1,220
Production (Pig Crop) (1000 HEAD)	20,180	20,180	20,550	20,550	0	20,900
Total Imports (1000 HEAD)	58	58	55	15	0	20
Total Supply (1000 HEAD)	36,770	36,770	37,330	37,290	0	38,010
Total Exports (1000 HEAD)	0	0	0	0	0	0
Sow Slaughter (1000 HEAD)	0	0	0	0	0	0
Other Slaughter (1000 HEAD)	17,700	17,700	18,200	18,200	0	18,700
Total Slaughter (1000 HEAD)	17,700	17,700	18,200	18,200	0	18,700
Loss and Residual (1000 HEAD)	2,345	2,345	2,000	2,000	0	2,200
Ending Inventories (1000 HEAD)	16,725	16,725	17,130	17,090	0	17,110
Total Distribution (1000 HEAD)	36,770	36,770	37,330	37,290	0	38,010
(1000 HEAD)						
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Not official USDA data

Production

2027

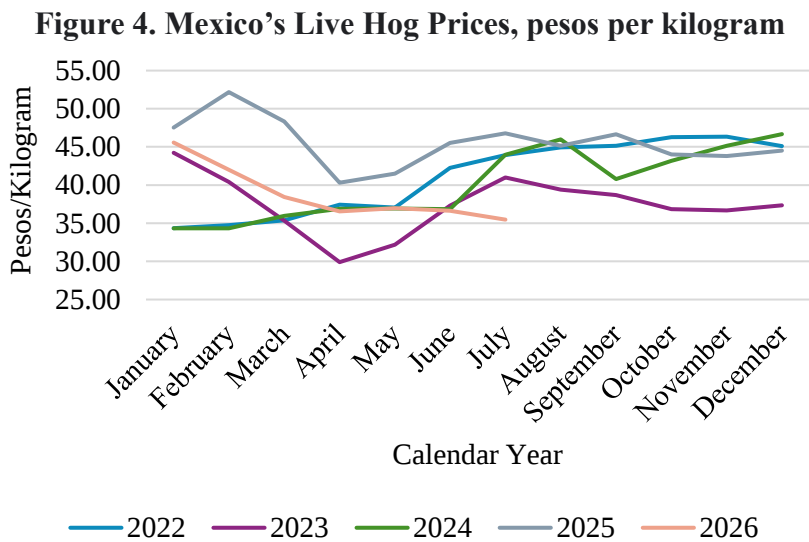
The pig crop is forecast to increase 2 percent to 20.9 million head in 2027. Producers replaced animals lost during the 2023–2025 Porcine Reproductive and Respiratory Syndrome (PRRS) and Porcine Epidemic Diarrhea virus (PEDv) outbreaks with more productive genetic sow lines. By 2027, replacement herds are expected to stabilize across major operations, with future growth dependent on capital-intensive barn expansion.

Beyond genetic replacement, modest growth in 2027 is supported by the expanded use of artificial insemination (AI) with imported semen. According to the Secretariat of Economia, the United States represents 85 percent of the market share, while Canada represents 15 percent. This approach reduces the need to import live breeding animals, lowering biosecurity risks while expanding genetic improvement across commercial farrowing operations. Additionally, traditional, independent backyard and small-scale farms are increasingly giving way to highly integrated corporate entities that manage the entire value chain, from grain importing and feed mills to advanced genetics, slaughtering, and cold chain distribution.

2026

The pig crop is estimated to increase 2 percent to 20.6 million heads in 2026. The estimated 2026 expansion is tied to an industry wide biosecurity overhaul. Large scale commercial producers culled vulnerable animals linked to the prior year's PRRS and PEDv outbreaks, replacing them with genetically improved herds and higher reproductive traits. The industry also adopted improved biosecurity measures, including enhanced sanitary infrastructure, regional movement controls, and disease

monitoring systems. These measures contributed to lower mortality rates and improved survival through weaning.



Source: National System of Market Information (SNIIM)

Slaughter

2027

Slaughter is forecast to rise 3 percent to 18.7 million heads in 2027. An expanding pig crop, driven by a larger breeding herd and improved sow productivity, is forecast to support higher slaughter volumes in 2027. Earlier replacement of older, lower-productivity sows with improved genetics has left a healthier, more productive herd, resulting in more piglets reaching market weight. Continued investments in nutrition, housing, and herd management are also expected to improve feed efficiency and reduce days to market, further supporting higher slaughter volumes.

2026

Slaughter is estimated to rise 3 percent to 18.2 million head in 2026. The increase in slaughter is supported by improved piglet survival rates following investments in herd health and replacement breeding stock after the prior year’s PRRS and PEDv outbreaks. As these larger pig crops reached market weight in 2026, they increased the number of market hogs available for processing. Improved operating margins and lower input costs are also expected to support higher slaughter rates by encouraging producers to maintain strong processing volumes.

Pork

Table 4: Pork – Production, Supply, and Distribution (PSD)

Meat, Swine Market Year Begins Mexico	2025		2026		2027	
	Jan 2025		Jan 2026		Jan 2027	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference) (1000 HEAD)	17,700	17,700	18,200	18,200	0	18,750
Beginning Stocks (1000 MT CWE)	0	0	0	0	0	0
Production (1000 MT CWE)	1,370	1,370	1,410	1,410	0	1,480
Total Imports (1000 MT CWE)	1,651	1,651	1,715	1,715	0	1,800
Total Supply (1000 MT CWE)	3,021	3,021	3,125	3,125	0	3,280
Total Exports (1000 MT CWE)	196	196	170	210	0	220
Human Dom. Consumption (1000 MT CWE)	2,825	2,825	2,955	2,915	0	3,060
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	2,825	2,825	2,955	2,915	0	3,060
Ending Stocks (1000 MT CWE)	0	0	0	0	0	0
Total Distribution (1000 MT CWE)	3,021	3,021	3,125	3,125	0	3,280
(1000 HEAD) ,(1000 MT CWE)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data

Production

2027

Pork production is forecast to rise 5 percent to 1.5 MMT CWE in 2027, supported by higher commercial slaughter and improved slaughter weights. Favorable grain prices during the prior years have restored producer margins, enabling investments in optimized sow-and-nursery nutrition, improved disease containment, and climate-controlled housing. These efficiency gains are reducing piglet mortality and boosting slaughter weights, driving total pork output higher relative to overall herd size. Additionally, continued investments in nutrition, modernized climate-controlled housing, and biosecurity protocols are lowering nursery mortality rates, allowing a higher percentage of market hogs to reach slaughter weight efficiently throughout the year.

2026

Pork production is estimated to rise 3 percent to 1.4 MMT CWE in 2026. This growth reflects sustained changes in how Mexican consumers, food processors, and restaurant networks purchase and use pork. Expanding domestic pork production strengthens supply availability for Mexico's food manufacturing and foodservice sectors. Increased domestic TIF slaughter provides processors with a more consistent supply of fresh pork trimmings, shoulders, and fatbacks for products such as ham, sausage, and chorizo. At the same time, HRI operators benefit from greater availability of key primal cuts, supporting steady supplies for popular menu items such as tacos al pastor and carnitas.

Consumption

2027

Consumption is forecast to rise 5 percent to 3.1 MMT CWE in 2027. The baseline consumer profile in Mexico's urban centers is evolving, supported by favorable macroeconomic conditions like consecutive

minimum wage increases. The rapid expansion of dual-income, middle class households has created a strong demand for value added convenience proteins. Large integration firms have capitalized on this by increasing supermarket shelves with marinated, portion controlled, and Ready-to-Cook (RTC) pork cuts. Pork is increasingly viewed as an everyday protein rather than being consumed primarily in traditional dishes such as pozole and carnitas.

Pork provides an optimal middle ground for middle-class budgets, offering a red-meat eating experience at a price point significantly closer to poultry. Real purchasing power in urban centers has been boosted by successive rounds of statutory minimum wage hikes and strong remittance inflows. Higher income urban households are willing to spend their increased discretionary income on time-saving premium features, such as pre-seasoned, pre-sliced, and pre-packaged meats rather than raw, un-trimmed bulk cuts. As large integrators continue expanding RTC product lines across Mexico's growing supermarket footprint, pork will increasingly consolidate its position as an everyday staple.

2026

Consumption is estimated to rise 3 percent to 2.9 MMT CWE in 2026, supported by stronger demand from tourism and industrial food manufacturing.

While total visitor arrivals fell below initial projections during the summer of 2026, Mexico’s co-hosting of the FIFA World Cup still delivered a measurable boost to the HRI sector. Gastronomy emerged as the single highest performing commercial category during the tournament. Concentrated visitor activity and fan gatherings in major host hubs, Mexico City, Guadalajara, and Monterrey, sustained strong food service demand, driving steady pork utilization across restaurant and institutional channels.



Source: National Institute of Statistics and Geography (INEGI)

Trade

Imports

2027

Imports are forecast to rise 5 percent to 1.8 MMT CWE in 2027. Imports are forecast to increase as domestic consumption continues to outpace production growth. Pork production is forecast to increase nearly 3 percent in 2027, while consumption is expected to grow at a slightly faster pace, widening the

gap between domestic supply and demand. As a result, imports will continue to play an important role in meeting Mexico's pork needs.

The United States is expected to remain Mexico's primary pork supplier, supported by price competitiveness, and duty-free access provided under the USMCA. At the same time, the expiration of Mexico's temporary duty-free import measures for non-FTA suppliers is expected to reduce the competitiveness of imports from other origins.

2026

Imports are estimated to rise by 4 percent to 1.7 MMT CWE in 2026. Although Mexico's swine sector continues to recover, consumption growth is expected to outpace domestic production, increasing reliance on imports to meet domestic demand. Demand is supported by continued needs from the food processing sector, particularly for hams and shoulders, as well as increased activity in the food service sector.

Mexico adjusted its temporary anti-inflationary import measures by establishing TRQs for non-FTA suppliers. Under the updated policy framework, 51,000 metric tons of fresh, chilled, or frozen pork from non-FTA countries may enter duty-free, while additional volumes are subject to the standard MFN tariff rate. The TRQ has already been fully allocated year-to-date, and imports are expected to continue as the year progresses.

Exports

2027

Exports are forecast to increase 5 percent to 220,000 MT CWE in 2027. Mexico's pork exports are forecast to recover in 2027 as domestic market conditions stabilize, and production growth supports greater export availability. As domestic consumption growth moderates and domestic production rebounds, processors are expected to have additional supplies available for export markets. Improved logistics conditions and continued access to key Asian markets are expected to support export opportunities, particularly for higher-value cuts.

2026

Exports are estimated to increase 7 percent to 210,000 MT CWE in 2026. Mexican pork production has continued its steady upward trajectory, supported by modernizations in swine health management, feed cost stabilization, and improved herd efficiencies. This increase in domestic production has created larger available volumes dedicated to export channels.

Mexican pork exporters are expanding their footprint across key Asian destinations (such as Japan and South Korea) and Latin American markets. Rather than competing solely on bulk primal cuts, Mexican processors are optimizing export value by targeting specialized cut preferences in high-demand international markets.

For More Information

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Report Number	Title	Dated
<u>MX2026-0012</u>	Livestock and Products Semi-annual	02/26/2026
<u>MX2025-0035</u>	Livestock and Products Annual	08/27/2025
<u>MX2025-0008</u>	Livestock and Products Semi-annual	03/03/2025

Attachments:

No Attachments