

**Required Report:** Required - Public Distribution

**Date:** March 20, 2026

**Report Number:** MX2026-0016

## **Report Name:** Poultry and Products Semi-annual

**Country:** Mexico

**Post:** Mexico City

**Report Category:** Poultry and Products

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### **Report Highlights:**

Chicken meat remains Mexico's primary animal protein, with 2026 production forecast to rise 2 percent to 4.2 million metric tons (MMT). This growth is fueled by sustained private sector investment, vertically integrated operations, and enhanced technology and biosecurity measures, aimed at increasing domestic self-sufficiency. Despite this expansion, production does not satisfy rising consumption, which is expected to grow 3 percent to 5.3 MMT. This demand is largely driven by the Hotel, Restaurant, and Institutional (HRI) sector. Imports are projected to rise 8 percent to 1.1 MMT, supported by continued duty-free access for Brazilian products.

## Chicken Meat

**Table 1: Chicken Meat – Production, Supply, and Distribution (PSD)**

Meat, Chicken Market Year Begins Mexico	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Beginning Stocks</b> (1000 MT)	0	0	0	0	0	0
<b>Production</b> (1000 MT)	3,990	3,990	4,085	4,153	4,150	4,235
<b>Total Imports</b> (1000 MT)	1,021	1,021	1,070	1,031	1,140	1,115
<b>Total Supply</b> (1000 MT)	5,011	5,011	5,155	5,184	5,290	5,350
<b>Total Exports</b> (1000 MT)	4	7	5	9	5	9
<b>Human Consumption</b> (1000 MT)	5,007	5,004	5,150	5,175	5,285	5,341
<b>Other Use, Losses</b> (1000 MT)	0	0	0	0	0	0
<b>Total Dom. Consumption</b> (1000 MT)	5,007	5,004	5,150	5,175	5,285	5,341
<b>Total Use</b> (1000 MT)	5,011	5,011	5,155	5,184	5,290	5,350
<b>Ending Stocks</b> (1000 MT)	0	0	0	0	0	0
<b>Total Distribution</b> (1000 MT)	5,011	5,011	5,155	5,184	5,290	5,350
(1000 MT)						

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

**Note:** Not official USDA data.

### Production

#### 2026

Chicken meat production in 2026 is forecast to increase 2 percent to 4.2 million metric tons (MMT).

Private investments in biosecurity and animal health protocols, particularly in 2025, significantly reduced hatchling mortality rates. This efficiency is expected to carry into 2026, allowing more birds to reach market weight. Production is concentrated in a few key poultry hubs, Jalisco, Puebla, and Veracruz, which possess the infrastructure, feed mill access, and processing plants.

The state of Veracruz has solidified its position as Mexico's primary broiler hub, while Jalisco remains the leader in the overall poultry flock due to its large layer population. In 2026, this regional specialization is expected to be supported by favorable global grain prices, which are boosting the profitability of Mexican integrators.

Major players like Pilgrim's Mexico and Bachoco are actively commissioning new hatcheries and feed mills in regions like Yucatán and Veracruz to localize supply chains and meet regional demand. Lower global prices for yellow corn and soybeans have boosted profitability, encouraging producers to optimize feed formulations and scale up operations.

#### 2025

Chicken meat production in 2025 increased 4 percent to 4.2 MMT. This growth was supported by industry's move toward high-efficiency industrial models and a surge in capital investment into biosecurity. Large, vertically integrated operations (over 100,000 birds) now account for more than 75 percent of total production. This consolidation leverages economies of scale and resilience against

fluctuating fuel and feed costs. Industry is also investing in automated feeding systems and climate-controlled housing, which mitigate the impact of adverse weather.

## Consumption

### 2026

Chicken meat consumption in 2026 is forecast to increase 3 percent to 5.3 MMT. As Mexico's most affordable and versatile protein, chicken is the primary staple for households and a key driver of growth in the food service sector.

The Hotel, Restaurant, and Institutional (HRI) sector is expanding rapidly, fueled by both tourism and the upcoming 2026 FIFA World Cup. As Mexico prepares to co-host the World Cup, the demand for consistent, high-volume poultry supply in host cities (Mexico City, Guadalajara, and Monterrey) is forecast to rise. Current forecast suggest the 2026 World Cup will attract roughly 5.5 million international visitors to Mexico. This influx is expected to push total arrivals past the previous baseline of 45 million annual visitors reported by UN Tourism. Travelers are increasingly expected to combine World Cup matches in host cities with leisure stays in the Mexican Caribbean (Cancún/Tulum) or Los Cabos.

The growth of fast-food chains and rotisserie outlets (*pollerías*) cater to an increasingly urbanized population looking for convenient, ready-to-eat protein. Current investments from large companies such as Bachoco and Pilgrim's Mexico in regional distribution centers and cold-chain logistics in the Bajío and Northeast corridors are expected to support supplies reaching host cities like Monterrey and Guadalajara without spoilage. These companies are prioritizing further processed products (marinated, portion-controlled, and breaded items) specifically designed for the food service industry to reduce prep time and labor costs during peak tourism periods.

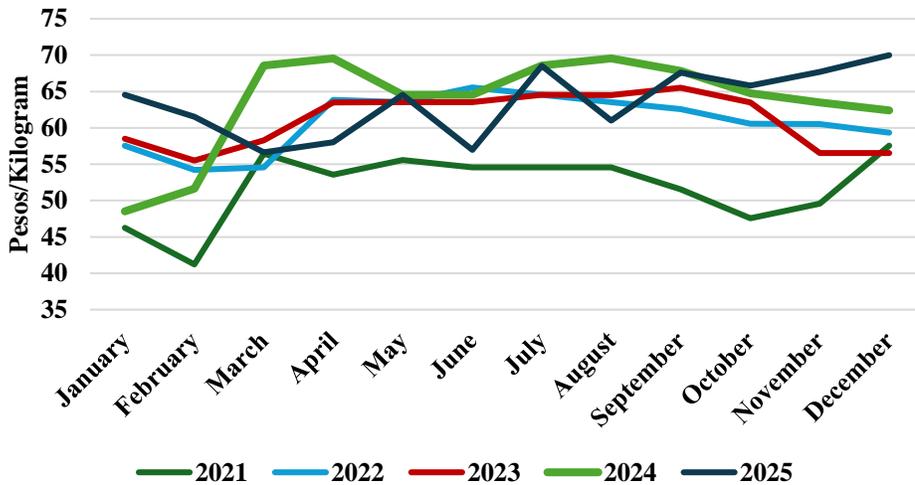
### 2025

Chicken meat consumption in 2025 increased 3 percent to 5.2 MMT. This was supported by demographic growth and a robust tourism sector.

Mexico's population was estimated at 131.7 million in 2025. Pollerías and rotisserie shops have become increasingly vital for Mexico's urban workforce. As 82 percent of the country is now urbanized, this demographic has created a market for consumers requiring high-protein, convenient, and ready-to-eat meals.

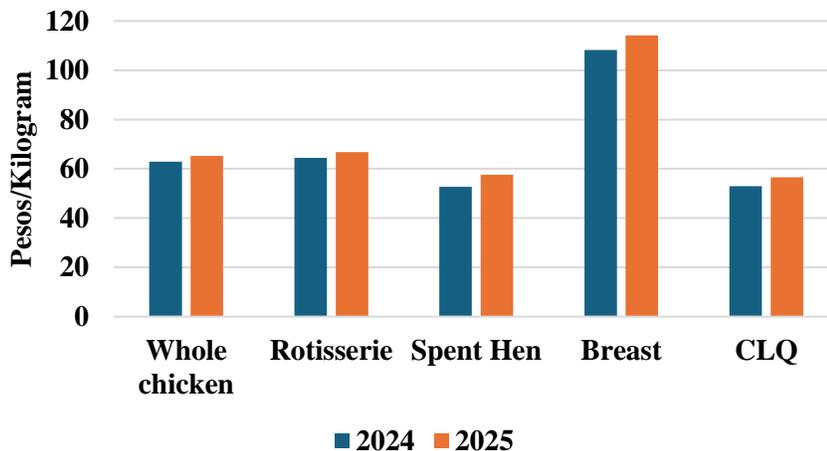
While whole chicken prices have seen upward pressure, market analysts still consider it affordable relative to other proteins. The red meat market faced much steeper volatility. Beef prices spiked by 16.7 percent year-over-year and pork prices rose by nearly 5 percent. While the rise in pork was not as extreme as beef, it remains roughly 2.5 to 3 times more expensive than whole chicken on a per-kilogram basis at the retail level.

**Figure 1: Mexico's Whole Chicken Prices (Pesos/kilogram)**



Source: Post and SNIM/Economia data

Figure 2: Mexico's Chicken Meat Retail Prices (Pesos/kilogram)



Source: Post and SNIM/Economia data

## Trade

### Imports

#### 2026

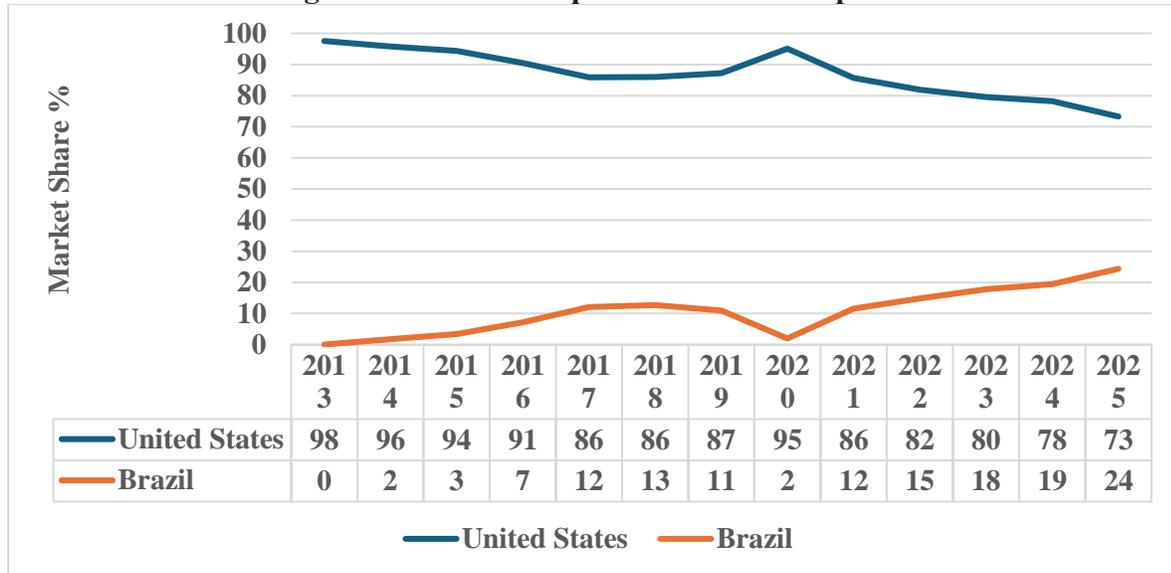
Chicken meat imports in 2026 are forecast to increase 8 percent to 1.1 MMT. This increase is driven by strong demand from a robust tourism industry and continued duty-free access for non-free trade agreement (FTA) countries.

To attempt to mitigate inflationary pressures and rising costs, Mexico extended the Presidential Anti-Inflation Decree an additional year, through December 31, 2026. Under this decree, chicken meat

remains tariff-free, exempting imports from non-FTA countries from the Most Favored Nation (MFN) duties.

Brazil has particularly benefited from this decree, surging as the top non-FTA supplier and capturing an increased market share in frozen cuts. Mexico imports from Brazil increased 27 percent in 2025 compared to the year prior. In 2026, Brazilian exports are expected to continue to compete aggressively on price.

**Figure 3: Mexico’s Top Chicken Meat Imports**



Source: Trade Data Monitor

**2025**

Chicken meat imports in 2025 increased 1 percent to 1 MMT. Although Mexico is the sixth-largest global producer, domestic production cannot satisfy consumption. Currently, nearly 20 percent of Mexico’s poultry demand must be met through imports.

The Mexican processing industry (sausages, hams, cold cuts) relies on imported parts like chicken leg quarters (CLQs) and mechanically deboned meat (MDM). Given that the United States and Brazilian consumers favor breast meat, parts like leg quarters are exported to Mexico at highly competitive prices, making them the ideal raw material for affordable Mexican deli meats.

**Exports**

**2026**

Chicken meat exports in 2026 are forecast to remain flat at 9,000 MT. Domestic demand and sanitary hurdles outweigh the incentives for global expansion.

Raw poultry faces strict sanitary restrictions in many countries due to avian diseases. However, heat-treated (RTE) products (such as nuggets, canned chicken, and pre-cooked breasts) are subject to fewer restrictions because the cooking process eliminates viral pathogens.

## 2025

Chicken meat exports in 2025 increased 29 percent to 9,000 MT. Mexican poultry integrators have been expanding their footprint in Central American retail markets. Mexico leverages its geographic proximity to offer fresher products or lower shipping costs compared to global competitors like Brazil in these specific regional pockets.

### Policy

#### *Presidential Anti-Inflation Decree*

On December 31, 2025, Mexico extended the [Presidential Anti-Inflation Decree](#) through 2026, maintaining some tariff exemptions for agricultural imports from non-FTA countries for companies listed in the “Register of Importers of Products of the Basic Basket.” While the updated decree removed beef and pork from the general list of duty-free eligible products, the Secretariat of Economy subsequently established specific Tariff-Rate Quotas (TRQs) for these commodities on January 5, 2026. These new agreements allow non-FTA suppliers to enter the Mexican market duty-free within specified volumes through the end of 2026, after which standard tariffs apply, though previously special licensed companies may continue to utilize the decree's broader administrative benefits until March 31, 2027.

Commodity	2026 Duty-Free Quota Volume
Pork	51,000 metric tons
Beef	70,000 metric tons

#### For More Information

Visit the FAS headquarters' home page at [Error! Hyperlink reference not valid.](#) for a complete selection of FAS worldwide agricultural reporting.

Report Number	Title	Dated
<a href="#">MX2025-0045</a>	Poultry and Products Annual	08/20/2025
<a href="#">MX2025-0010</a>	Poultry and Products Semi-annual	03/04/2025

#### Attachments:

No Attachments