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Prepared By: Adriana Otero Arnaiz

Approved By: Lita Echiverri

Report Highlights:

Organic products have been part of the Mexican market for more than 30 years, with a formal legal framework in place for about 20 years. Organic opportunities in Mexico continue to expand as the economy improves. Bilateral trade of organic products between the United States and Mexico increased by 25 percent in 2024, reaching nearly \$2.2 billion. The main organic exports in 2024 from the United States to Mexico were apples, pears, grapes, lettuce, and spinach. Mexico's top organic exports in 2024 to the United States were avocados, berries, cucumbers, and tomatoes.

Mexico's Organic Overview

Mexico's organic sector continues to grow with an increase in area production and trade. In 2024, bilateral organic trade between the United States and Mexico increased by nearly 25 percent reaching \$2.17 billion. Organic products are gaining popularity, with significant room for growth in the domestic market. However, organic products are still considered a luxury good in Mexico due to higher prices compared to conventional alternatives - which limits domestic consumption to a small segment of the population with higher purchasing power.

Mexico's organic certification process can be lengthy and expensive with access to actual production output data often limited. Mexico's organic certification and information is governed by the National Service for Agro-Alimentary Public Health, Safety and Quality (SENASICA) which oversees organic certification and Mexico's National Organic Operation Control Board (NOOCB) which provides the organic information system and classifies certified organic producers. Classifications are broken down into four categories of production methods: crop production (fruits and vegetables), animal production, food processing and harvesting or wild collection (also known as extraction).

Production

In 2024 organic area production increased by 30 percent, due to better weather conditions and motivated by increased trade opportunities. However, the number of producers decreased, primarily among small producers, due to the difficulty of maintaining an organic certification. The number of certified producers of processed products increased, however, mainly due to the coffee processing members' ability to adhere to certification requirements.

Table 1: Number of Certified Organic Producers

	2020	2021	2022	2023	2024
Plant Crops	40145	45284	48055	46042	35851
Processed Products	5741	4821	6040	4257	22667
Animal	2738	3383	3099	3045	3160
Extraction	42	12	12	11	10

Data Source: National Organic Operation Control Board (NOOCB)

Crop Production

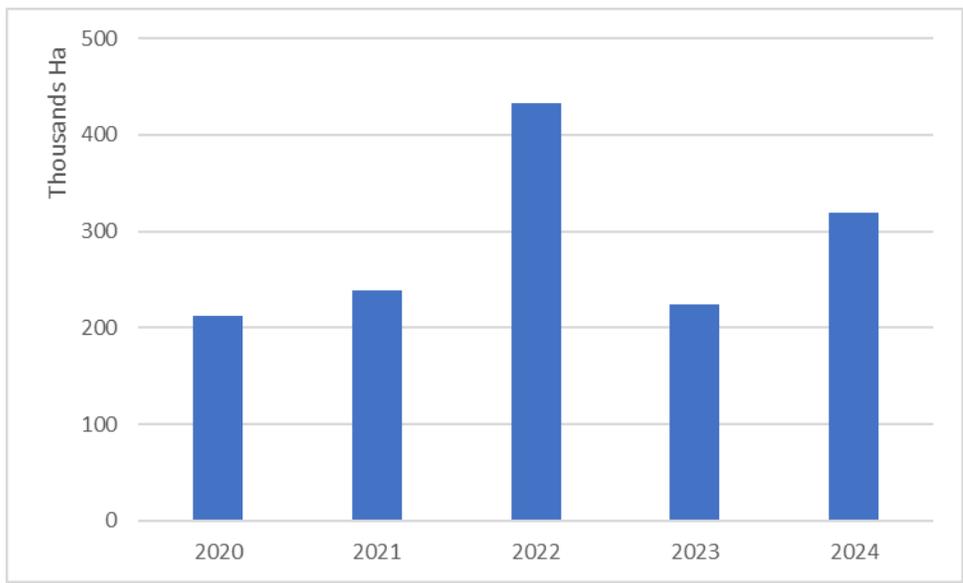
Crop production (which includes coffee, avocado, orange, mango and banana, and other) is Mexico's largest organic sector. In 2024, total area dedicated to this sector increased from 223,768 to 319,056 ha due primarily to export demand and improved weather conditions with increased rain from the previous year. Coffee experienced the largest increase in area production with 69,849 hectares in 2024, while organic berries continue to demonstrate growth potential due to its high profitability.

While crop production area increased in 2024, the number of producers during the same period decreased from 46,042 to an estimated 35,851 due to the challenges of maintaining organic certification

status, with the greatest impact on small producers. Of crop producers, approximately 89 percent, equivalent to 32,001 producers, were dedicated to organic coffee production, a 21 percent drop from 2023. The number of certified producers also declined for crops such as oranges, avocados, mangoes, bananas, cocoa, corn, sorghum, and tomatoes. In contrast, increases were observed in certified producers of sesame, peppers, cinnamon, coconut, and vanilla.

The 12 percent decrease in organic producers reflects a combination of economic and regulatory pressures that made it increasingly difficult for many farmers, especially smallholders, to maintain their organic certification status. Organic certification involves annual inspections, compliance paperwork, and fees that can be prohibitively expensive, especially for small-scale producers. Many farmers lack financial support or subsidies to cover certification or transition costs. Group certification schemes (organized through cooperatives) also faced budget cuts or logistical difficulties, leading to drops in enrollment. Some organic producers struggled to find stable buyers or receive premium prices that justified the costs and effort of staying certified. In smaller urban regions, the domestic organic market remains underdeveloped, and the lack of infrastructure (storage, transportation to the main cities, local processing) discouraged continued participation in organic systems. Some farmers shifted to integrated or sustainable practices that do not require certification (e.g., agroecology, regenerative agriculture), particularly in areas where certification did not provide clear market advantages. These practices may still be environmentally friendly but are not officially recognized as "organic" under current certification systems.

Figure 1: Area Dedicated to Organic Crop Production in Mexico (thousands of hectares)



Data Source: National Organic Operation Control Board (NOOCB)

Animal Production

In 2024, honey and beekeeping derivatives accounted for the largest animal production with over 3,120 producers. Beekeepers focus production on high biodiversity and low intensive agriculture areas, like Yucatan peninsula, to meet [organic standards](#). Regulations also require beekeepers to include controls on feed (natural nectar/pollen), restricted treatments for pests, and isolation from conventional chemical exposures.

Beekeepers comprised 99 percent of certified organic animal producers. Between 2020 and 2023, the number of certified organic honey producers in Mexico fluctuated from 2,704 in 2020 to its peak of 3,335 in 2021. It declined to 3,070 in 2022 and further to 3,022 in 2023. This drop was primarily attributed to COVID-19 impacts on certification audits and financial constraints. In 2024, a modest recovery was observed with 3,123 certified producers, suggesting a potential stabilization of the sector, possibly driven by renewed market interest and support programs for organic apiculture like [Producción para el Bienestar](#), which enables beekeepers to qualify for direct financial support to maintain or improve sustainable and agroecological practices, including organic certification efforts.

In 2024, the number of Mexican (non-beekeeping) animal organic producers including meat and dairy from cattle, poultry, goats and sheep producers was very modest, as shown in Table 3. The lack of access to organic feed and grazing resources are contributing factors limiting the growth of Mexico's animal organic production, preventing large-scale expansion.

Table 3: Number of Organic Certified Animal Producers in Mexico

	2020	2021	2022	2023	2024
Bees	2704	3335	3070	3022	3123
Cattle	5	9	15	12	22
Chicken	7	76	13	9	14
Goat	1	1	2	1	1
Pig	1	3	1	1	1
Sheep	0	1	0	0	1
Turkey	1	1	1	0	0
Buffalo	0	0	3	0	0
Duck	0	0	1	0	0

Data Source: National Organic Operation Control Board (NOOCB)

Processed Products

One growth sector of organic production is processed foods, with more than 2,000 certified organic processed products on the market in 2024. These products are made from both Mexican grown and imported organic ingredients, that comply with national certification standards to legally carry organic labels. Certified organic processed foods include items such as coffee, juices and pulps, dehydrated

products, flours and oils, cheese, traditional spirits like mezcal (when made from organic agave), and other packaged organic foods.

Extraction or Wild Collection

Extraction and wild product certification remains a very niche market. The harvesting or wild collection of products from their natural habitats, including resins, fungi, and medicinal plants and species can be certified as organic by the SENASICA, if the collection process is sustainable, controlled, and traceable. The collection area must be clearly defined, free of prohibited substances for at least three years, and harvesting practices must not harm ecosystems or compromise species regeneration. A documented management plan and certification by a SENASICA-approved body are required. Wild products are not exempt from inspection and must meet the same traceability and labeling requirements as other organic products. In 2024, the number of certified harvesters of wild products remained extremely limited at 10, representing different cooperatives or small companies.

Market Orientation: Organic vs. Conventional and Domestic vs. Export Markets

The volume of organic production remains low compared to conventional production, according to the most recent official data (see report [MX2024-0030](#)). Many producers report that premium prices in the domestic market do not offset the higher costs of organic production and certification.

However, in Mexico's northern border states, better infrastructure and logistics support a more export-oriented organic sector, particularly to the United States, where markets are more profitable. Mexico often supplies the U.S. market during its off-season, helping meet demand gaps. For example, strawberries, herbs, tomatoes, and pepper production in central Mexico is largely conventional and geared toward the domestic market. In contrast, 95 percent of the area planted in Baja California for these crops is certified organic and primarily destined for export to the United States, where products can command a premium price for organic of up to 25 percent.



FAS Mexico Field Visits to Organic Production in Baja California.

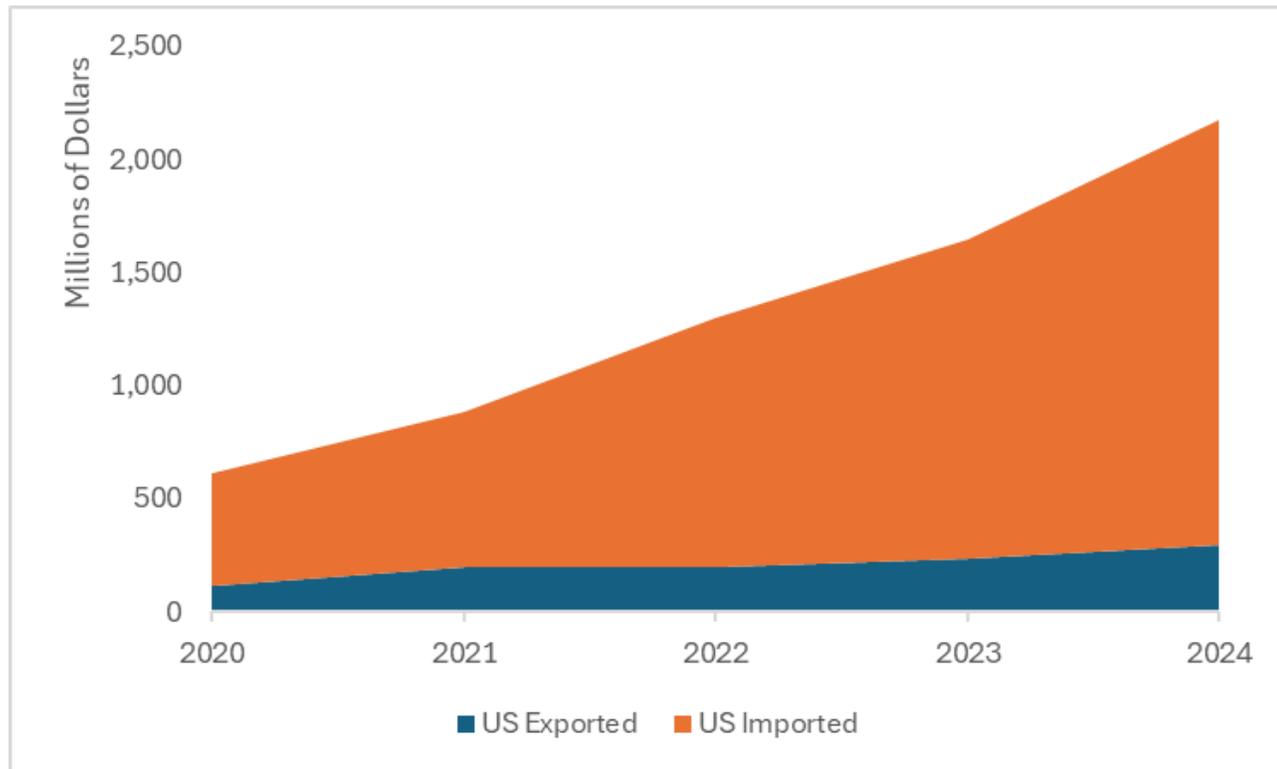
Trade in Organic Products

Tracking trade in organic products remains challenging due to the limited availability of organic-specific Harmonized System (HS) codes. While the HS system includes codes for certain fresh organic products—such as milk, fruits, and vegetables—it does not cover processed goods or organic nuts, making comprehensive monitoring of organic trade flows difficult. While the HS system captures only a portion of organic trade, it remains a valuable tool for analyzing export trends of the commodities it does cover.

Despite these limitations, trade in organic products between the United States and Mexico is significant and continues to grow. U.S. exports to Mexico of products classified under existing organic HS codes, particularly berries and avocados have increased in recent years. The actual value of organic trade between the two countries is undoubtedly much higher than what is reflected in official statistics.

In 2024, U.S. organic exports to Mexico reached a record \$296 million, representing a 21 percent increase over the previous year. During the COVID-19 pandemic, exports declined to \$118 million, mirroring trends across the agricultural sector but have rebounded steadily since 2020 (See Figure 3).

Figure 3: U.S. Organic Trade with Mexico (U.S. \$ Millions)



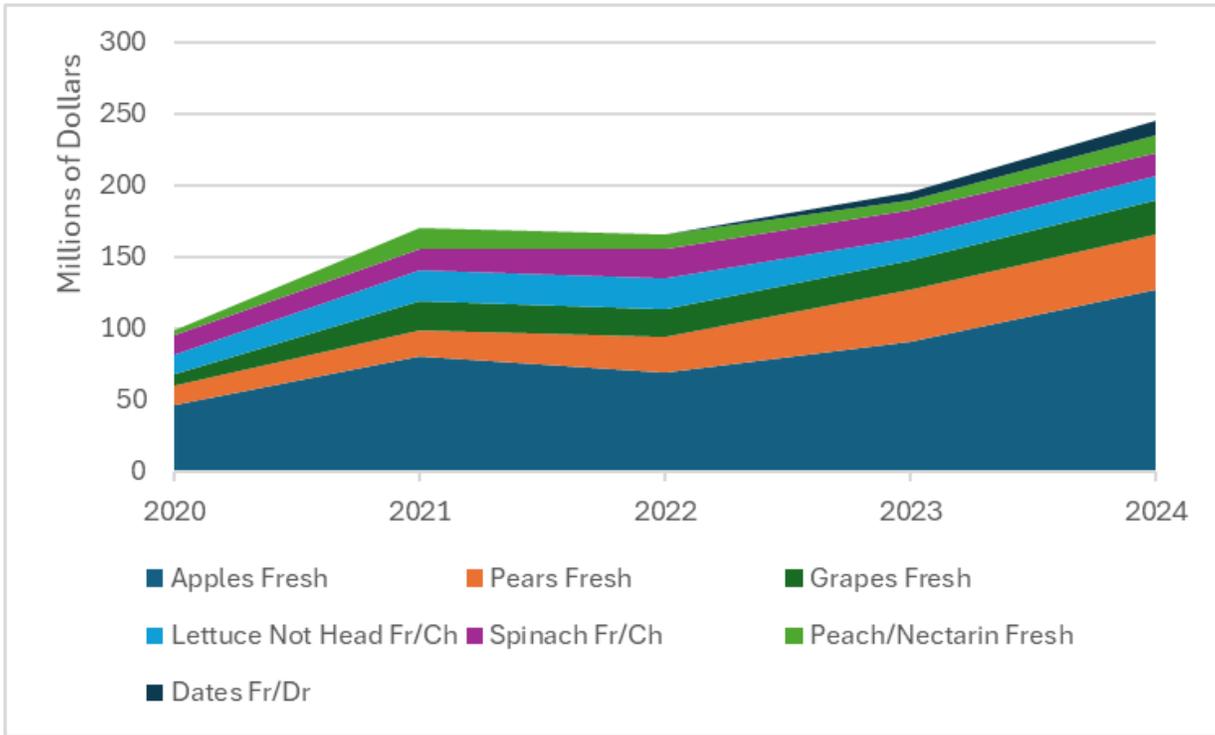
Data Source: USDA's Global Agricultural Trade System ([GATS](#))

Meanwhile, U.S. imports of organic products from Mexico totaled \$1.87 billion in 2024, highlighting Mexico's importance as a key supplier of organic produce to the U.S. market.

The primary U.S. organic product exported to Mexico under an HS code is fresh apples, with exports totaling \$126.7 million in 2024. This was followed by organic pears, with exports valued at \$38.6 million (See Figure 4). These figures reflect the strong demand for U.S. organic fruits in the Mexican market.

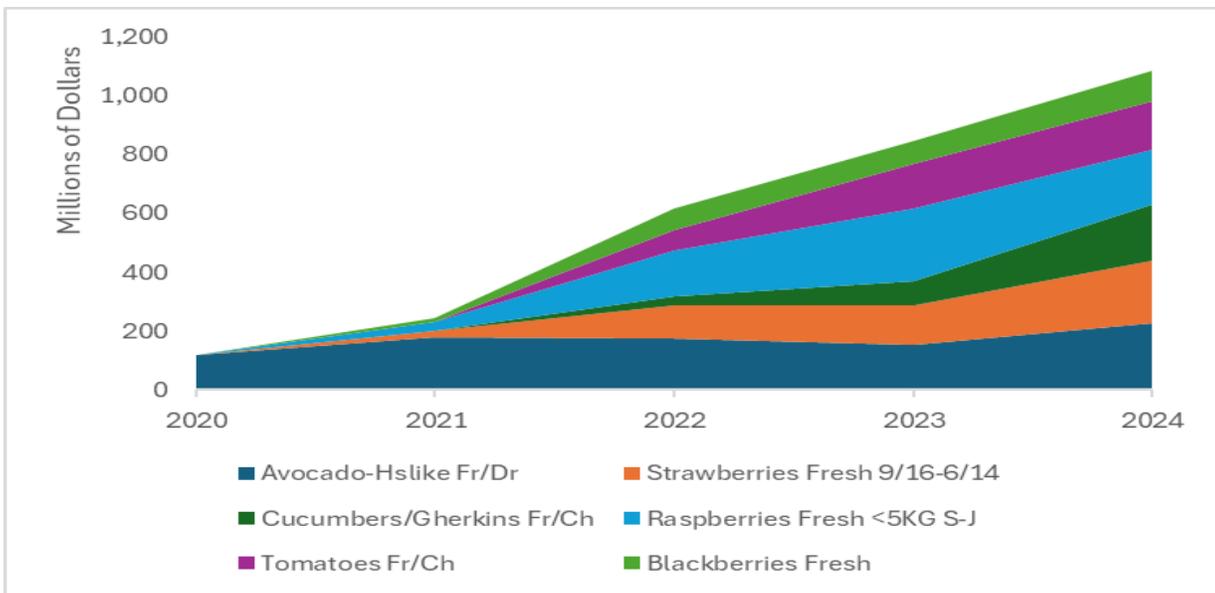
As previously reported ([MX2024-0030](#)), Mexico exports large volumes of organic products to the United States, many of which either complement existing U.S. products or are not produced domestically due to climatic limitations (See Figure 5). These include avocados, tropical fruits, coffee, and honey. In addition, Mexico exports several organic products that directly compete with U.S.-grown organic goods, such as berries, squash, and soybeans. This dynamic illustrates Mexico's dual role as both a complementary supplier and a competitor in the U.S. organic market.

Figure 4: Top U.S. Organic Exports to Mexico



Source: USDA’s Global Agricultural Trade System ([GATS](#))

Figure 5: Top U.S. Organic Imports from Mexico



Source: USDA’s Global Agricultural Trade System ([GATS](#))

Consumption

The Mexican organic market has significant room for growth. Organic products are gaining popularity and benefit from the support of the Government of Mexico (GOM), which promotes organic agriculture as an environmentally sustainable alternative. However, the relatively high cost of organic products compared to conventional alternatives limits domestic consumption to a small segment of the population with higher purchasing power (see report [MX2024-0030](#)).

Food is the main source of expenditure for Mexican households. It represents an average of 37.7 percent of consumer income, equivalent to an average of \$316.69 per month, according to the 2024 National Household Income and Expenditure Survey ([ENIGH](#)) prepared by the National Institute of Statistics and Geography (INEGI).

An analysis by the Mexican Institute for Competitiveness ([IMCO](#)) shows that the proportion of income spent on food decreases as family income increases. Although all households spend most of their income on food and beverages, the proportion varies according to income level. The first income decile spends 51 percent on food and beverages, while households in the highest income decile spend 29 percent of their total spending on this category.

Marketing

Organic products are increasingly visible in retail outlets across Mexico. Most major supermarket chains, such as Walmart, H-E-B, La Comer, Costco, and Sam's Club, feature dedicated organic sections or place organic products alongside conventional ones, improving visibility and access for consumers.

Although Mexican consumers continue to show a preference for in-store shopping, e-commerce is gaining traction and gradually reshaping consumption habits (see report [MX2024-0030](#)). Major platforms offering organic products include Amazon, Mercado Libre, Walmart, and Soriana. Additionally, several specialized online retailers have emerged, such as:

- [YEMA](#)
- [Orgánicos y Naturales](#)
- [GREAT Alimentos Orgánicos](#)
- [The Green Corner](#)

These platforms are helping expand the reach of organic products, particularly among younger and digitally connected consumers.

Oversight and Legal and Certification Framework

SENASICA is responsible for organic certification. NOOCB is responsible for providing official data on the number of certified organic producers and the area dedicated to organic production.

The Mexican Law for Organic Products (Ley de Productos Orgánicos, or LPO) is the main legal framework that regulates the production, certification, processing, labeling, and trade of organic

agricultural products in Mexico. It was enacted in 2006, and its regulation (Reglamento) was officially published in 2013, establishing how the law would be implemented.

The LPO was designed to ensure that products labeled as "organic" in Mexico meet defined standards of sustainability, traceability, and integrity, protecting both consumers and producers.

The LPO applies to:

- Crops, livestock, aquaculture, wild products, and processed foods labeled as organic.
- Domestic and imported products sold as organic in Mexico.
- Certification bodies and the procedures to approve them.

The LPO ensures that when consumers buy organic products, they are genuinely produced under strict standards. It supports international trade, establishing a recognized legal framework that trading partners (like the U.S., EU, and Canada) can reference. Additionally, it provides institutional structure, clarifying the roles of SADER, SENASICA, and certification bodies, ensuring coherent governance. According to the Mexican Law for Organic Products ([LOP](#)):

- Article XII: The label "organic" refers to a product derived from agricultural production or activity that complies with the Law for Organic Products and its associated regulations. For labeling purposes, the terms "organic," "ecological," "biological," and prefixes like "bio" and "eco" are all considered synonyms under Mexico's LOP.
- Article XVII: Organic Production: production and food processing systems, animal products, plant products, or other commodities with a regulated and restricted use of external inputs, including the absence of the use of synthetic chemical products.

In Mexico, the authority to certify organic production rests with the SENASICA, under the Secretariat of Agriculture. Certification may be issued either directly by SENASICA or through certification bodies authorized by the agency (see [List of Certified Agents](#)).

Producers must comply with specific regulations regarding the use of [inputs](#)—such as herbicides, fertilizers, and pesticides—in order to obtain the “ORGÁNICO MÉXICO” seal. Processed products are also subject to LOP requirements to be labeled and sold as organic in the domestic market. Oversight of processed organic products falls under the Secretariat of Economy, specifically through PROFECO (Mexico's Consumer Protection Agency).

Mexico updated its organic guidelines and began enforcing LOP requirements for imported products in January 2022. Further information on Mexican legislation for organic products is available on the SENASICA website: <https://www.gob.mx/senasica/documentos/39618>

Regarding trade with the United States, twenty USDA-accredited organic certifiers operate in Mexico, and there are currently over 2,600 USDA-certified organic operations in the country. Products must be certified under the USDA National Organic Program (NOP) to be exported to the United States as organic.

Table 3 categorizes products by enforcement point and competent authority. Note: The table is intended as a quick-reference guide, and as such it is not comprehensive. Mexico’s regulations are the authoritative source for enforcement points and competent authorities.

Table 4. LPO Enforcement by Product and Secretariat

SENASICA – Point of Entry	PROFECO – Point of Sale
Imports	Imported and Domestic
Bulk Product/Material Imported for Retail Sale in Mexico Listed in Annex b-f by HS code	Processed Product (e.g., bottle of vinegar) and Bulk Product/Material for Retail Sale in Mexico All Products Marketed as Organic
Each shipment verified at time of import (at point of entry)	Spot check verifications conducted as response to specific complaints
The products must be accompanied by the following documents: copy of the organic certificate or equivalent and International Transaction or Control Document (Form O-SQ-F-03).	Whether imported or domestic, as of January 1, 2022, all products marketed as organic should be certified to the LPO.

Regulatory History and Labeling Requirements

Mexico published its original national organic law and corresponding standards in 2006 under the LPO (See [Report No. MX6501](#)). In 2015, the GOM announced a grace period—from May 2015 to October 2016—to allow organic exports to Mexico time to comply with the LPO and its subsequent regulatory updates, including the 2010 regulations and the 2013 guidelines on organic labeling and production practices. (See GAIN Report No. MX2015-2073.)

On June 8, 2020, the GOM published Modifications to the Guidelines for Organic Operations in the *Diario Oficial de la Federación* (federal gazette), concluding a multi-year process of revising and updating the LPO’s standards.

In December 2020, Mexican authorities declared their readiness to enforce the LPO for all raw materials and processed products marketed as organic within the country. Following consultations with industry stakeholders and trading partners, Mexico offered two extensions to the enforcement deadline, ultimately confirming January 1, 2022, as the final compliance date.

Organic products exported to Mexico must comply with Mexico’s organic labeling regulations. Products certified to the USDA National Organic Program (NOP) may display the USDA Organic seal, and products certified under Mexico’s LPO may display the “ORGÁNICO MÉXICO” seal. To be marketed as organic in Mexico, products must be certified under the LPO.

Opportunities & Challenges for U.S. Organic Exports to Mexico

Opportunities for U.S. Organic Exports to Mexico

1. Growing Demand for Health-Conscious and Premium Products: As income rises, consumers tend to prioritize quality, safety, and health benefits, core values of organic products. Higher-income Mexican households (top deciles) that spend 29 percent of their income on food represent a key market for U.S. organic exports, especially in urban centers like Mexico City, Monterrey, and Guadalajara.
2. Niche Market Segments: Mexico has an emerging upper-middle class and expatriate population more familiar with and interested in U.S. organic products, including gluten-free, plant-based, and functional foods. Gourmet retailers and organic specialty stores are expanding, creating more distribution points for imported organic products.
3. Established U.S.–Mexico Trade Relationship: The USMCA trade agreement facilitates access for U.S. agricultural and organic goods with zero tariff. U.S. organic products enjoy a reputation for quality and consistency, which can help overcome domestic trust issues with local labeling.
4. Limited Domestic Organic Supply: Despite having nearly 36,000 certified organic producers, Mexico's domestic organic production is mostly export-oriented (e.g., berries, coffee, avocados, vegetables), leaving room for imports to meet domestic demand, especially in processed and packaged organic goods.

Challenges for U.S. Organic Exports to Mexico

1. High Food Expenditure as a Share of Income: With an average of 37.7 percent of household income going to food, affordability is a significant concern. For lower-income households (bottom deciles), which spend up to 51 percent on food, organic products may be viewed as luxury items, limiting the broader consumer base.
2. Price Sensitivity and Market Segmentation: Organic products are priced higher than conventional options, making them accessible mostly to wealthier consumers. The uneven income distribution in Mexico narrows the viable market to higher-income segments, requiring targeted marketing and distribution strategies.
3. Regulatory Complexity: Compliance with the LPO and NOM standards is necessary, particularly for processed foods and beverages.
4. Domestic Competitors and Informal Markets: Some local producers sell “agroecology” or “natural” products without certification at lower prices, appealing to price-sensitive consumers and creating unfair competition for certified imports. Mistrust in certifications or lack of consumer understanding can also reduce willingness to pay a premium.

Strategic Recommendations:

- Target high-income urban consumers with well-branded, value-added organic goods (e.g., organic snacks, baby food, plant-based dairy).
- Leverage e-commerce and health-conscious retailers to reach niche markets without relying solely on large supermarket chains.
- Educate consumers about the value and certifications of U.S. organic products to build trust and brand loyalty.
- Partner with local distributors to navigate logistics, labeling, and regulatory compliance effectively.

Sources of Information

National Organic Operation Control Board:

<https://dj.senasica.gob.mx/SIAS/Statistics/Inocuidad/OperacionOrganicalNal>

Mexican Legislation for Organic Products: [Mexican Legislation for Organic Products | Servicio Nacional de Sanidad, Inocuidad y Calidad Agroalimentaria | Gobierno | gob.mx \(www.gob.mx\)](#)

National List Of Allowed Substances 2023 LPO Mexico:

https://www.gob.mx/cms/uploads/attachment/file/830046/National_List_of_Allowed_Substances_2023_LPO_M_XICO.pdf

AGREEMENT Through Which Diverse Provision Of The Guidelines For The Organic Operation Of The Agricultural And Livestock Activities Made Public On October 29th, 2013 Are Modified, Added Or Repealed: https://www.gob.mx/cms/uploads/attachment/file/662402/English-DOF_8_Junio_Acuerdo_Modificacion_de_Lineamientos_Operacion_Organica- Version_integral.pdf

AGREEMENT Provided To Promote The National Distinctive Of Organic Products And Establish The General Rules For Its Use In The Labeling Of Certified Organic Products:

https://www.gob.mx/cms/uploads/attachment/file/194130/NationalSeal_1_.pdf

Organic Products Act First About Objective and Application of The Law:

https://www.gob.mx/cms/uploads/attachment/file/194131/OrganicProductsLaw_1_.pdf

Bylaw of The Law For Organic Products:

https://www.gob.mx/cms/uploads/attachment/file/194132/OrganicProductsRegulations_1_.pdf

AGREEMENT Through Which The Guidelines For The Organic Operation Of The Agricultural And Livestock Activities Are Made Public:

<https://www.gob.mx/cms/uploads/attachment/file/194133/OrganicGuidelines.pdf>

Guide To Request The Equivalence Determination Regarding To Organic Production:

https://www.gob.mx/cms/uploads/attachment/file/210718/Organic_Products_Equivalence_Guide.pdf

Register of Certification Organizations for Organic Products OCO 03/21/2024:

https://www.gob.mx/cms/uploads/attachment/file/896527/Padron_Organismos_de_Certificacion_de_Productos_Organicos_2024-03-21.pdf

Register of Participatory Organic Certification Systems 10/10/2023:

https://www.gob.mx/cms/uploads/attachment/file/862387/Padron_Sistemas_de_Certificacion_de_Organica_Participativa_2023-10-05.pdf

Guidelines and Infographics of SENASICA about organic production, labeling, Ingredients, traceability, and several topics (Spanish): [Guías e infografías | Servicio Nacional de Sanidad, Inocuidad y Calidad Agroalimentaria | Gobierno | gob.mx \(www.gob.mx\)](#)

Guidelines for Importing Organic products to Mexico:

https://www.gob.mx/cms/uploads/attachment/file/784074/Importacion_ENG.pdf

Attachments:

No Attachments.