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Report Highlights:

In 2025, Mexico was the 13th largest economy in the world, with a moderate growth of 0.8 percent led primarily by the agricultural sector. Mexico remained the top market for U.S. agricultural exports at a record \$30.6 billion, a 1-percent increase from 2024. Corn, soybean, pork, dairy, and poultry products reached record sales in 2025, with growing demand for fresh fruit, nuts, bakery goods and food preparations.

Executive Summary: In 2025, Mexico was the 13th largest economy in the world, with a moderate growth of 0.8 percent led primarily by the agricultural sector. Mexico remained the top market for U.S. agricultural exports at a record \$30.6 billion, a 1-percent increase from 2024. Corn, soybean, pork, dairy, and poultry products reached record sales in 2025, with growing demand for fresh fruit, nuts, bakery goods and food preparations.

Consumer-Oriented Agricultural Imports 2025

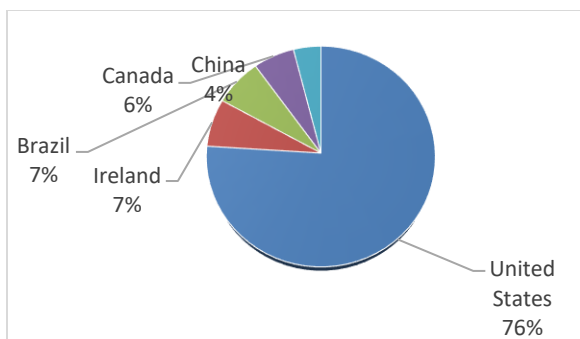


Chart 1: Top Exporting Countries to Mexico 2025

Food Retail Industry: The retail sector targets the top 30% of consumers and continues to grow with rising demand for convenience, premium, and health-oriented products. Healthy and savory snacks, meat and dairy products continue to see growing opportunities for U.S. exports to Mexico. For more information, please see our Retail Foods report.

Food Processing Industry: The food processing industry represented 17.2 percent of Mexico’s GDP in 2025. Mexico is the world’s fourth largest processed food exporter. Best U.S. prospects include baking ingredients, pulses, dairy and meat products. Additionally, there is a growing demand for healthy foods, with local consumers closely following U.S. processed food trends.

Food Service Industry: Mexico’s hotel and restaurant sector is expanding, driven by increased tourism, culinary innovation, and rising consumer expectations. Mexico’s HRI industry seeks high-quality, sustainable, premium ingredients and food products, creating continued opportunities for U.S.

exporters. Please see our [Food Service report](#) for more information.

Quick Facts CY 2025

Imports of Consumer-Oriented Products (US \$14.9 million)

List of Top 10 Growth Products in Host Country (Trade Data Monitor LLC)

1) Corn	2) Pork
3) Dairy	4) Soy
5) Poultry	6) Beef
7) Wheat	8) Food Prep.
9) Fresh Fruit	10) Sugar/ Sweeteners

Top 10 Host Food Processors (based on sales)

1. Grupo Bimbo
2. Coca – Cola Femsa
3. Arca Continental
4. Grupo Modelo
5. Sigma Foods
6. Gruma
7. Grupo Lala
8. Bachoco
9. Heineken Mexico
10. Constellation Brands Mexico

GDP/Population
 Population (millions): 131 million
 GDP (billions USD): 1.86 (2025 trillion)
 GDP per capita (USD): 14,185.8 (2025)

Sources: Population [World Bank](#)
 GDP: Most recent value [World Bank](#)
 GDP per capita [World Bank](#)

Strengths/Weaknesses/Opportunities/Threats

<i>Strengths</i>	<i>Weaknesses</i>
Proximity to the United States and USMCA Trade Agreement.	Abundant supply of domestic raw materials and trade agreements with other countries.
<i>Opportunities</i>	<i>Threats</i>
Trends towards healthy, savory and sustainable products.	Strong peso and high inflation, and challenging regulations.

Section I: Market Overview

In 2025, Mexico remains the 13th largest world economy, with an estimated Gross Domestic Product (GDP) of \$1.86 trillion. The economy experienced moderate growth of 0.8 percent, primarily led by the agricultural sector. However, in comparison, the service and industrial sectors, experienced challenges as the Mexican government paused its investment in the development of future public infrastructure projects. Annual general inflation was 3.69 percent, maintaining moderate levels and an increase in the minimum wage of 12 percent was implemented, seeking to improve purchasing power.

Mexico remained the top market for U.S. agricultural exports at a record \$30.6 billion, a one percent increase from 2025. Top U.S. exports to Mexico reaching record sales in 2025 include corn, pork, dairy, poultry, and soybeans. U.S.-Mexico bilateral agricultural trade remains strong, reaching over \$75 billion. U.S. agricultural imports from Mexico were valued at \$44 billion, nearly a 10 percent decrease from the previous year. Top U.S. imports from Mexico include beer, tequila, berries, and avocados. The bilateral relationship is important as both countries work together to support food security and rely on closely linked supply chains under the U.S.-Mexico-Canada Free Trade Agreement (USMCA).

Mexico is a key player in the global food industry, with an advanced food processing sector. In 2025, Mexico's population reached over 131 million with increased domestic consumption and demand for local food products. However, while Mexico's food manufacturers are well established, there is a shortfall of domestic supply and reliance on imports of food ingredients and additives, leaving growing opportunities for U.S. exports to fill the food gap to meet local demand. The food processing industry represents approximately 17.2 percent of the Gross Domestic Product (GDP), according to data from the National Institute of Statistics and Geography (INEGI). Additionally, changes in consumption habits and a growing preference for healthy and ready-to-eat processed food products has energized Mexico's food processing sector.

In 2025, Mexico's food processing industry experienced steady growth driven by the development of innovative healthier, convenient, and value-added products. As a result, retail stores are responding to the growing food processing opportunities, like healthy ready-made snacks, and are adapting their formats. Additionally, Mexican consumers are becoming more conscientious about how and where their food is processed and sourced and as a result, Mexico's food industry is investing and focusing on sustainability, digital traceability, and turning to artificial intelligence to develop new products according to consumer preferences. Mexico is the world's fourth largest exporter of processed foods and ranks first in exports of beer, spirits, bakery products and fresh produce.

Table 1. Top Five Mexico Exports to the World in 2025

Country	Total Value (USD) 2025	Top Three Products
United States	\$44 billion	Beer Spirits Fresh Vegetables
Japan	\$708 million	Pork Avocados Spirits
Canada	\$772 million	Avocados Guavas Beef
Guatemala	\$510 million	Non-alcoholic beverages Sauces Food preparations
Colombia	\$214 million	Non-alcoholic beverages Food preparations Infant food preparations

Source: USDA GATS

Table 2. Advantages and Challenges

ADVANTAGES	CHALLENGES
Proximity to the United States and USMCA trade agreement.	14 free trade agreements competing with USMCA, covering 50 countries.
Strong food processing sector that relies on imported products to meet demand.	High logistic costs and infrastructure deficiencies, especially in transportation and cold storage.
Trends towards healthy and sustainable products, including opportunities for U.S. organic, low-sodium, and sustainable ingredients.	High production costs and consumer prices are impacted by inflation and economic volatility.
Expansion of e-commerce and digital channels. Growth in online sales of food and beverages.	Strict compliance with sanitary and labeling regulations, due to changing standards on nutritional content and advertising.

Section II: Roadmap for Market Entry

o *Entry Strategy*

Post recommends that U.S. companies new to exporting contact their [State Regional Trade Groups](#) (SRTGs) and/or their State Departments of Agriculture for assistance in determining export readiness. This includes defining a correct Harmonized System (HS) code for the product and complying with U.S. regulations before exporting i.e. Food and Drug

Administration (FDA) certificates and U.S. Department of Agriculture (USDA) certificates, etc., for detailed information regarding the Mexican market and competition. Additionally, SRTGs are an important resource in identifying upcoming promotional activities, including trade missions, buying missions and marketing campaigns, implemented in coordination with FAS.

○ *Import Procedure*

U.S. exporters should contact Mexican distributors/importers early when entering the market. Local distributors/importers handle permits and payments and complete the import process. A good distributor understands local policies, local practices (such as payment terms and schedules, which can vary from company to company), regulations, and sales promotion while ensuring product availability. They can help anticipate challenges like transportation delays and border issues. Maintaining close contact with Mexican counterparts is key to staying updated on import procedures and official requirements.

For more in depth information, see publicly available reports on the USDA's Foreign Agricultural Service (FAS) and Global Agricultural Information Network (GAIN) [website](#), specifically the [Exporter Guide](#), which provides general recommendations for first-time exporters to Mexico.

If you are exporting to Mexico, please review information on product requirements, labeling issues, and other relevant topics available via the FAS GAIN system. There, you will find useful reports such as the [Food and Agricultural Import Regulations and Standards \(FAIRS\) Export Certificate](#) and the [FAIRS Country Report Annual](#). Exporters can also find relevant information about the USMCA [here](#).

○ *Market Structure*

Processing companies in Mexico source ingredients based on production capacity to meet demand. Food manufacturers rely on domestic, imported and specialized suppliers to source high quality and consistent products. Multinationals present in Mexico, Grupo Bimbo for example, typically have a global procurement office or dedicated department to source directly from exporters, including those in the United States. In contrast, medium and small companies often rely on distributors or brokers. A key first step for small and medium exporters is to contact a local importer or distributor, as they have established relationships with food processors, helping facilitate market entry (see Appendix A for a chart of Mexico's distribution channels). Food importers and distributors in Mexico handle various tasks, including customs clearance, regulatory compliance, and market distribution. Pricing structures vary based on negotiations with the exporter and typically include:

- Commission-based fees (5-15 percent of the product's total value)
- Fixed fees for specific services (e.g., customs clearance, paperwork)
- Profit margins, where importers add a margin to cover costs and generate profit

Changes vary based on shipment volume, product type, and service level. It is essential to clarify pricing conditions up-front and understand all costs involved in the importing process before agreeing. Consider that the best market-entry strategy depends on your product. For companies entering or expanding into Mexico, trade shows are an excellent way to gain market insights,

establish contacts, and build relationships with importers, distributors, and processors while learning about local food trends and industry infrastructure. Key trade shows in Mexico for U.S. companies supplying food ingredients are:

[Food Tech Summit & Expo](#): The most significant food ingredient and processing show held annually in Mexico City with over 450 exhibitors. The show specializes in food ingredients, additives, packaging, and machinery for the food and beverage processing industry.

[Expo ANTAD](#): the most significant retail trade show in Mexico, with over 1200 exhibitors and 65 participating countries. Members of ANTAD include the most important food manufacturers and retailers, and ANTAD organizers offer a match-making service. More than 52 thousand people visit the show every year. It is a great show to gain insights into Mexico’s most important food trends. ANTAD will be the first FAS endorse trade show in Mexico in 2027.

- *Share of Major Segments in the Food Processing Industry*
The most important sectors in Mexico for food processing are dairy products, followed by bakery and meat products. These sectors stand out for their production volume, economic impact, and export levels.

Table 3. Food processing main sectors in Mexico

Sector	Production / Value	Leading Companies	Key Characteristics
Bakery	\$15 billion	Grupo Bimbo	Global leader, strong exports presence
Snacks and confectionery	\$8 billion	Barcel, Mars	Innovation and growth in domestic consumption
Meat	\$7.2 million tons annually	Sukarne, Sigma	Cattle farming industry integration, exports to the U.S.
Beverages	Beer: 4 th largest exporter	Grupo Modelo, FEMSA	Strong domestic market, leadership in beer
Dairy	\$2.26 billion	Grupo Lala, Nestlé	High internal demand, increasing exports

- *Company Profiles & Company Products*

Table 4. Leading Food Processors in Mexico and their products

	Company	Products
1	Grupo Bimbo	Bread, bakery products, snacks
2	Coca -Cola Femsa	Carbonated drinks, juices, bottled water
3	Arca Continental	Soft drinks, snacks
4	Grupo Modelo	Beer (Corona, Modelo)
5	Sigma Foods	Processed meats, dairy products, cold cuts
6	Gruma	Corn flour, tortillas (Mission)
7	Grupo Lala	Dairy (milk, yogurt, cheese)

8	Bachoco	Poultry, eggs, animal feed
9	Heineken Mexico	Beer (Tecate, Heineken)
10	Constellation Brands MX	Premium beer (Corona, Modelo)

○ *Sector Trends*

Mexico is the 12th largest food processor worldwide and companies stay abreast of modern trends and technology to grow the sector. Manufacturers and processors regularly adapt existing technology and develop innovations to meet changing demands and focus on sustainability and automatization to increase efficiency.

The main sector trends in the Mexican food processing industry include:

- Increased demand for “healthy”, functional foods with clean labels and fewer ultra-processed ingredients.
- Artificial intelligence as development tools, supply chain digitalization and traceability, and automation for industrial scalability.
- The expansion of supermarkets, discount retailers, and convenience stores is creating growth opportunities for premium products and private labels.
- Sustainability, especially in the meat industry, lab grown meat is gaining interest in the Mexican market.
- Diversification is important as retailers identify niche products, including organic foods, and a growing preference for Asian cuisine and snack products.

Mexican consumers are moving towards healthy options, demonstrating:

- Increase health awareness: consumers are better informed about the relationship between good nutrition and health. Seeking foods that can help them to prevent diseases and improve life quality.
- Desire for transparency: consumers are spending more time researching product ingredients and paying closer attention to labels and nutritional information.
- Growth of functional foods: growing demand for food products with probiotics, antioxidants, and proteins.

Section III: Competition

The Mexican food processing industry source inputs from local suppliers, due to lower costs and logistical benefits. However, some local suppliers struggle with quality, traceability, or an inability to meet demands. As a result, processors turn to imports to fill the gaps. While U.S. agricultural products face strong competition in Mexico, they are still highly regarded for their quality and ease of access. By leveraging the USMCA and its established supply chains, U.S. suppliers can capitalize on the gaps and position themselves as key partners in meeting Mexico’s growing demand for high-quality food ingredients.

In 2025, Mexico imported \$36.5 billion of consumer-oriented products. The United States was Mexico’s leading supplier in this category, accounting for \$15 billion of Mexico’s total consumer-oriented products imports. However, third- country suppliers, notably Ireland, Brazil, Canada and China offer the largest competition to U.S. exports.

Section IV: Best Product Prospects

Table 5: Best product prospects

	<p>Multifunctional Ingredients</p> <p>Drive innovation and consumer preferences. Consumers value products with less sugar and beverages that include fiber. Fibers with good potential in the market are Fructooligosaccharides (FOS), Galacto-oligosaccharides (GOS), Inulin, and other soluble fibers.</p>
	<p>Sustainability</p> <p>The environmental, social, and governance (ESG) approach is gaining ground in the global food and beverage industry. Food processors in Mexico are also adopting these trends by using environmentally friendly energy, biodegradable packaging and recycling. Some sustainable solutions are enzymes, starches, and natural antioxidants.</p>
	<p>Health and Wellness</p> <p>Growing consumer awareness of their well-being has increased demand for products that offer health benefits like prebiotics, adaptogens like Lion’s Mane and Reishi, known for mental wellbeing.</p>
	<p>Value added</p> <p>This trend is driving brands to update their formulas, seeking ingredients with more benefits. Consumers are looking for products that can combine a health benefit with affordability and sustainability.</p>
	<p>Global culinary experiences</p> <p>Consumers are opting for fun and innovation through new flavors, despite being more conservative in their spending overall. In Mexico, due to the increasing migration of Asian population, several Asian products are available in the market. The popularity of K-pop among the young Mexican consumers that look for snacks and fast foods.</p>
	<p>Plant-based foods</p> <p>The evolution of plant-based foods is gaining ground beyond meat alternatives made from plants and fortifies with proteins and vitamins. Ingredients that help the plant-based food solutions are pulse proteins, enzymes for texture and mouthfeel, natural flavors and colors for appearance.</p>
	<p>Functional indulgence</p> <p>Demand for indulgent products that provide taste and functional benefits is also increasing. Products in presentations like gummies, chocolates, added with vitamins, minerals like magnesium, or collagen.</p>

Source: The Food Tech – Seven trends that domain the food and beverage industry.

Table 6. Top Mexico’s imports of consumer-oriented products by category 2025 from the world and United States (U.S. Dollars)

Country	Product Category	Value	Country	Product Category	Value
Ireland	Food flavorings	\$2.1 billion	United States	Corn	\$5.9 billion
Brazil	Chicken Cuts	\$641 million		Pork and pork products	\$2.9 billion
Canada	Pork and pork products	\$370 million		Wheat	\$1.1 billion
China	Tilapia	\$154 million		Soybeans	\$977 million
Chile	Salmon	\$141 million		Beef and beef products	\$1.3 billion

Source: USDA GATS US Exports to Mexico CY2025

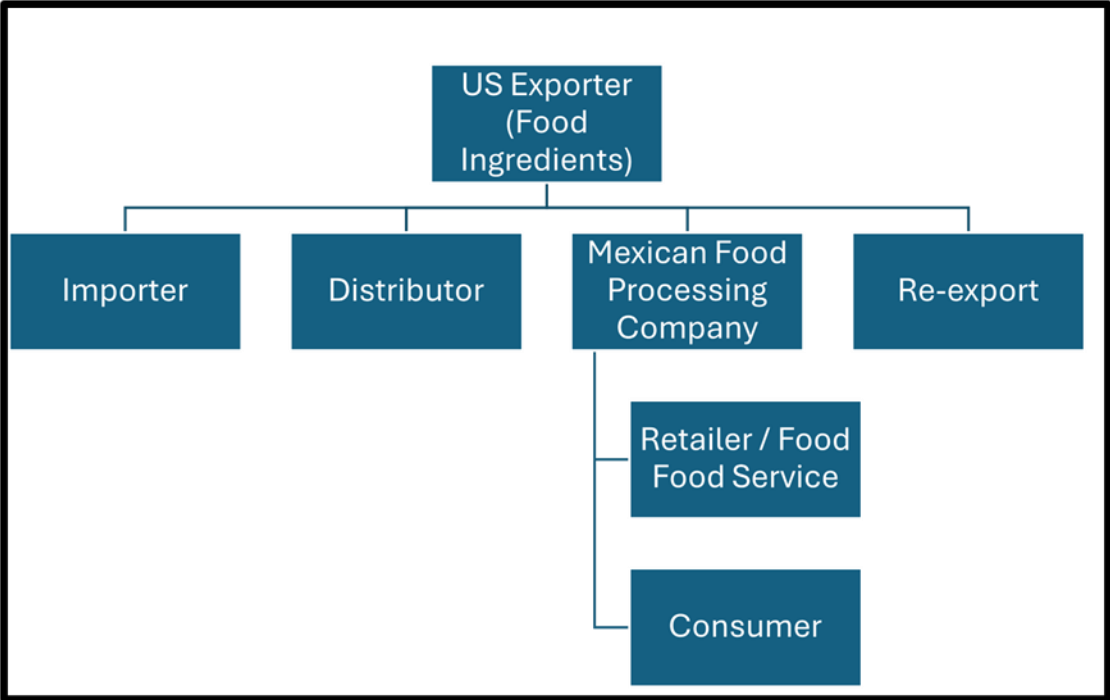
Section V: Key Contacts and Further Information

<p>Agricultural Trade Office Mexico City Presa La Angostura 225 Col. Irrigación, Miguel Hidalgo Mexico City, Mexico 11500 http://www.fas.usda.gov</p>	<p>Phone: +52 (55) 2579-2000 Email: AgMexico@usda.gov</p>
<p>Agricultural Trade Office Monterrey Prol. Av. Alfonso Reyes 150 Valle Poniente, Santa Catarina Nuevo Leon, Mexico 66196 http://www.fas.usda.gov</p>	<p>Phone: +52 (81) 8047-3100 Email: AgMexico@usda.gov</p>

Visit this [website](#) for available USDA programs, and consult the FAS

Appendix A

Diagram 1: Distribution Channels for Food Ingredients in Mexico



Attachments:

No Attachments