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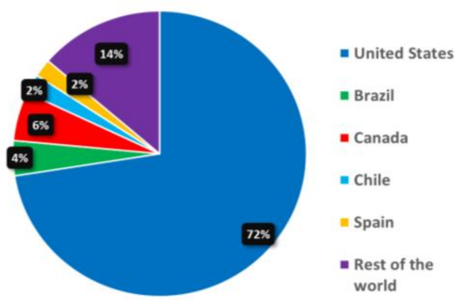
Report Highlights:

Mexico remains the top market for U.S. food and agricultural exports, which reached a record $30.6 billion in 2025, accounting for 18 percent of total U.S. food and agricultural exports. Market opportunities continue to expand with U.S. consumer-oriented products increasing by 13 percent. U.S. meat products, food preparations, fresh vegetables, and baked goods are among the largest growing food categories. Continued opportunities in the retail and food service sectors, with increased growth in the food processing sector, makes Mexico an optimal market for U.S. products. Maintaining a strong grasp of the Mexican import process and business culture and identifying an experienced and reputable importer will help U.S. companies maximize market opportunities in Mexico.

Executive Summary: In 2025, Mexico ranked as the world's 13th largest economy with gross domestic product (GDP) growing by 0.8 percent[1] to reach $1.82 trillion[2] and expected to increase 1.1 percent in 2026[3]. Bilateral agricultural trade between Mexico and the United States totaled $74.5 billion in 2025[4], a six percent decrease from 2024. However, Mexico remains the top export market for U.S. agricultural exports, reaching over $30.6 billion in 2025. Key U.S. exports to Mexico, including meat and meat products, dairy, processed vegetables, and confectionery, continue to show strong market potential.

Mexico's Consumer-Oriented Agricultural Imports 2025



Source: Trade Data Monitor, LLC.

Food Retail Industry: Mexico's retail sector continues to show strong momentum, growing over seven percent in 2024 to surpass $80 billion. Walmart dominates the landscape through their omni-channel strategy, including a robust e-commerce presence. Other online platforms and grocery delivery apps keep expanding, particularly among middle- and high-income consumers. Key trends include the continued growth of private label products, increasing demand for healthy foods and snacks, confectionery, and pet food. Retail remains strong, with over 50 percent of consumers relying on retail stores for everyday purchases. For more information, please refer to our Retail Foods report.

Food Processing Industry: Mexico's food processing industry continues to grow, accounting for approximately 17.2 percent of the country's GDP in 2025. The sector is highly dynamic and relies heavily on U.S. ingredients and inputs. Leading categories include processed meat, dairy, baked goods, and confectionery, with major companies such as Grupo Bimbo, Coca-Cola, and Sigma Alimentos shaping industry trends. Mexico's broad network of trade agreements, well-established logistics infrastructure, population growth, and shifting consumer preferences make it a strategic market for U.S. food ingredient exports. Additionally, there is a growing demand for healthy foods, with local consumers closely following U.S. processed food trends. For a deeper look, please refer to our Food Processing Ingredients Annual report.

Food Service Industry: Mexico's food service sector continues to expand, valued at an estimated $66.6 billion in 2024, with tourism playing a major role in driving demand. Mexico remains heavily reliant on imported food and beverages, with the United States supplying 72 percent of its consumer-oriented product imports in 2024. For more details, please refer to our latest Food Service Report.

Quick Facts CY 2025

2025 Mexican Consumer-Oriented Products Imports
(Trade Data Monitor LLC)
US $19.3 billion – from World
US $13.9 billion – from the U.S.

List of Top 10 Growth Products in Host Country 2025
(Trade Data Monitor LLC)

1) Pork & Pork Prod
2) Dairy Products
3) Beef & Beef Products
4) Poultry Meat & Prod
5) Soup & Other Food Preparations
6) Fresh Fruit
7) Bakery Goods, Cereals & Pasta
8) Processed Vegetables
9) Meat products NESOI
10) Chocolate & Cocoa products

Top 5 Mexico Food Retailers (*Source: Mordor Intelligence*)

1. Walmart
2. Oxxo
3. Soriana
4. Chedraui
5. La Comer

GDP/Population
Population (millions): 131 million (*World Bank, 2025*)
GDP (USD): $1.86 trillion (*World Bank, 2025*)
GDP per capita (USD): $14,185.8 (*World Bank, 2025*)

Strengths	Weaknesses
Deep U.S.-Mexico economic integration allows U.S. food trends and products to enter the Mexican market rapidly and swiftly.	Price sensitivity may limit demand for premium or niche U.S. products, such as wines, high-end meats, or specialty dairy products.
Opportunities	**Threats**
Mexico's growing middle class and interest in imported products, especially healthy, convenience foods, are giving demand for innovative companies seeking to export to Mexico.	Problems at the border can delay customs clearance and delivery timelines.

[1] National Institute of Statistics and Geography (INEGI, 2026)
[2] World Meter estimates from IMF
[3] Banco de Mexico
[4] USDA Economic Research Service (2026)

Section I: Market Overview

Mexico is a dynamic market and remained the top market for U.S. food and agricultural products in 2025. Mexico currently ranks as the 13th largest economy in the world, although 2024 saw GDP growth slow to 1.2 percent down from 3.1 percent in 2023. Its supply chain is well-integrated with the United States' supply chain due to its proximity as a bordering country. As spending among the high and upper-middle income levels remains strong and as preferences for U.S. food trends continue to increase, Mexico is likely to remain a top market for U.S. food and agricultural products.

Bilateral agricultural trade between Mexico and the United States reached $74.2 billion in 2025. U.S. agricultural exports to Mexico totaled over $32 billion (a seven percent increase from 2024), led by corn ($5.8 billion), pork ($2.7 billion), dairy ($2.6 billion), soybeans ($2.3 billion), food preparations ($1.2 billion), and wheat and meslin ($1.1 billion).

Domestic consumption remains strong, bolstered by low unemployment rates (2.8 percent), stable inflation (3.8 percent), and substantial remittances ($61.8 billion in 2025). However, Mexico's high rate of poverty, informality (55 percent of the economy works in the informal sector), and security issues cause social and economic challenges. U.S. exporters should weigh both the market's potential and regional variations in infrastructure, security, and logistics to identify viable, cost-effective entry points and tailor their strategies accordingly.

Demographic Trends

Mexico is the second most populous country in Latin America, with an estimated population of 131 million and projections to reach almost 151 million by 2050. With a median age of 30 in 2025, Mexico's youthful population is digitally engaged, brand-curious, and increasingly health-conscious, key traits that shape food preferences. Mexican households average 3.6 members and 2.25 income earners. Multigenerational living and value-seeking behaviors drive demand for family-sized goods and affordable, high-quality brands. Consumers allocate roughly 38 percent of household income to groceries for at-home dining, and 20 percent to dining out, making both retail and foodservice key channels in the Mexican market and good opportunities for U.S. food products.

Urbanization stands at 80 percent, concentrated in cities like Mexico City, Monterrey, Guadalajara, and Puebla (and 11 other cities that have more than one million inhabitants). These urban hubs provide U.S. exporters access to middle- and high-income consumers who tend to favor imported and premium foods and are increasingly exposed to global food trends. To support exporters, FAS Mexico publishes market snapshots highlighting export opportunities in key Mexican cities, available through our Global Agricultural Information Network (GAIN).

Additionally, Mexico's significant American expat population, around 1.6 million in 2026, is concentrated in high-end areas in Mexico City and in cities like San Miguel de Allende and Merida. This growing expat community creates retail opportunities for consumers looking for familiar U.S. brands, premium foods, and international cuisine. Meanwhile, the tourism and food service sectors have fully recovered from the COVID-19 pandemic, even surpassing pre-pandemic levels and continuing to grow. These sectors continue to boost consumption in key tourism centers, contributing to diversification in the foodservice sector and more opportunities for U.S. exporters.

Market and Consumer Trends

Building on these demographic shifts, several key consumer trends are reshaping purchasing habits and creating new avenues for U.S. food and agricultural products in Mexico. Understanding consumer preferences can help U.S. exporters better position their products in the Mexican market.

- **Focus on Health and Wellness:** Mexico is one of the fastest growing markets for nutritional supplements and food products, with a rising demand for products characterized as being low in sodium, low in sugar, plant based, nutritionally fortified, high in fiber, or containing probiotics. Although the market is price sensitive, Mexican consumers, particularly young adults entering the job market, are willing to pay more for products with added health benefits.

- **Convenience and Ready-to-Eat Solutions:** Demand for frozen meals, meal kits, and ready-to-eat products is surging, fueled by dual-income households and urban commuting. Food processors continue to innovate with more convenient options tailored to quick, urban lifestyles.

- **Environmentally Conscious Consumption**: Consumers, particularly young adults, are increasingly more conscious of the environment and consuming fresh products. Many prefer purchasing foods with "clean ingredients" and packaged in material with low environmental impact.

- **Premiumization and Brand Consciousness:** More upper middle- and high-income consumers are willing to pay premium prices for quality products, especially name brands with quality ingredients, and specialty foods. This trend particularly applies to meat products, dairy products, snacks, beverages, and pet food products.

- **Growth of Pet Ownership and Pet Care Spending:** With 71 percent of Mexican households owning at least one pet (mostly dogs, which account for 71.7 percent of the pet food market), demand is strong for pet food and care items (such as pet treats and health supplements), categories where U.S. exporters enjoy a strong reputation for quality and consistency. Additionally, Mexico's pet food market reached an estimated $8.25 billion in 2025, up 5.9 percent from 2024, with demand for premium products increasing and lower-priced segments showing signs of slowing[5].

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[5] Pet Food Industry (2025)

- **Digital Engagement and E-commerce Expansion:** Mexican consumers use social media and online platforms to discover, compare, and purchase products, amplifying opportunities for U.S. products to be known, marketed, and distributed more widely. The vast majority (84.6 percent) of Mexican consumers own a smart phone, and 43.5 percent of consumers reported to have made purchases through the internet in 2025[6]. Additionally, artificial intelligence (AI) is accelerating digital commerce, with 68 percent of shoppers reporting that AI influences their purchasing decisions, making online platforms increasingly effective channels for product discovery and market expansion[7].

Table 1: Advantages and Challenges

Advantages	Challenges
Strong understanding of the U.S. business culture and increased awareness of U.S. trends and quality products.	Mexico has free trade agreements with over 50 countries[8], increasing competition for U.S. exporters. Local producers are also improving quality and at lower prices, especially in processed goods.
Improved customs procedures and transparency. Ongoing investments in intermodal logistics and rail, road, and seaport infrastructure strengthen cross-border trade flows and trust in U.S. supply chains.	Sanitary/labeling regulations sometimes differ between U.S. and Mexican authorities. U.S. exporters should prepare for adjustments in formulas, label design, and required documentation to avoid costly delays.
Larger retailers operate advanced logistics systems and offer robust e-commerce channels, making them ideal entry points for U.S. brands seeking urban market access.	Rural areas face logistical bottlenecks and are more vulnerable to crime, hindering distribution. Exporters targeting national reach should work with local partners to overcome these gaps.
Aspirational, middle-class consumers seek innovative and premium food experiences, driving demand for health-conscious, premium, and imported products, where U.S. brands are highly competitive.	Border congestion and customs backlogs can delay perishable shipments. Exporters should maintain flexibility in inventory planning and stay informed about seasonal surges and sudden product bans or restrictions.

[6] DENUE INEGI
[7] Mexico Business News (2025)
[8] Mexico Ministry of Economy (2026)

A strong peso increases purchasing power for imported goods, favoring U.S. exports of premium and high-value products such as specialty cheeses, chocolates and confectionery, high-end meat cuts, and organic products.	Unfavorable exchange rates can reduce the competitiveness of U.S. products.

Section II: Exporter Business Tips

Mexican importers are business savvy and sophisticated, and therefore, it is important that companies practice due diligence and conduct market research. FAS Mexico recommends U.S. exporters, especially those new to exporting, contact their State Regional Trade Groups (SRTGs) and/or their State Departments of Agriculture to ensure companies are export ready, including understanding the Harmonized System (HS) codes and ensuring compliance with all applicable U.S. regulations (e.g., Food and Drug Administration (FDA) certificates, U.S. Department of Agriculture (USDA) documentation, etc.). Having general knowledge of the Mexican market will prepare companies as they meet with the SRTGs. Additionally, the SRTGs often work in coordination with FAS to conduct activities in the market such as trade missions, marketing campaigns, and promotional events. Exporters are encouraged to participate in these initiatives when possible.

Pre-Export Preparation

- **Ensure regulatory and labelling compliance.** The Mexican government requires food products deemed unhealthy, including products with excess calories, salt and fat, to meet Mexican Official Standards (NOMs) labeling requirements. Verify whether your product is required to include labels. Non-compliance can result in costly delays or port rejections. For example, health and wellness products with unverified nutritional claims may trigger compliance flags.

- **Conduct market research and competitor analysis.** Use FAS GAIN reports, USDA cooperators, and trade groups to assess trends and competitor pricing. A product trending in Mexico City's high-end supermarkets for example, may not have the same success in southern Mexico or in more traditional informal markets. Understanding these differences can help position products more appropriately.

- **Select a reputable importer, distributor, or broker.** A capable local partner ensures regulatory compliance and access to key channels.[9] Vet potential partners carefully. If the

[9] See information from the U.S. Commercial Service

buyer is also the importer, clarify in writing who handles customs clearance and documentation. A nationwide distributor can boost market reach and reduce delays.

Market Entry & Expansion

- **Plan for logistics, distribution, and delivery performance.** U.S. exports to Mexico depend on multiple ports of entry (i.e., 117 seaports, 65 airports, and 47 land ports of entry) and regionally variable logistical conditions. If it is the first time an importer is clearing a product through a particular port of entry, the importer should first verify that the port of entry is authorized to process that product category before shipping to avoid delays, rejections, and demurrage charges. Access to reliable cold chain systems as products are transported and stored is especially critical for perishable products. Exporters that proactively plan for logistical challenges gain a competitive edge, especially on time and quality consistency for temperature sensitive products.

- **Adapt your product and marketing.** Translate product materials into Spanish and have them reviewed by native Spanish speakers. Translation mistakes can lead to border rejections or cancellations. Tailor packaging and format to the target audience (e.g. snack packs for convenience stores, family sizes for supermarkets).

- **Attend local trade shows and build local relationships.** Events like Food Tech Summit & Expo, Expo ANTAD, ABASTUR, Expo Cerveza Mexico, and Expo Carnes y Lacteos connect exporters with buyers. In-person engagement builds trust, which is essential in Mexico's relationship-driven business culture and with rapid the rise of technology-enabled fraud making Mexican importers more cautious and wary of digital and cross-border transactions.

- **Understand business etiquette and regional variations.** Business culture and practices that work in northern Mexico may not work in the south. A distributor in Oaxaca or Veracruz may expect more in-person interaction before doing business. Allocate resources for traveling and avoid scheduling meetings during important holidays, including Christmas and Easter. More information about this can be found here.

- **Monitor policy and regulation updates regularly.** Mexican food laws can change frequently. Keep updated on new Mexican policies, including sudden product bans or restrictions, through FAS reporting in the GAIN system and stay in regular contact with your importer.

- **Digital Engagement and E-commerce Expansion.** Social media and digital platforms are key tools for entering the Mexican market, allowing U.S. companies to increase product visibility, connect with consumers, and drive sales through targeted marketing and e-commerce. As Mexican consumers frequently engage with and popularize U.S. products online, digital engagement can facilitate brand recognition and accelerate market entry.

Section III: Imported Food Standards, Regulations and Procedures

Building on the general market entry tips previously mentioned, entering the Mexican market requires compliance with different import regulations and procedures. Information on import regulations, customs procedures, product requirements, labeling requirements, import procedures, and other Government of Mexico (GOM) regulations, decrees, agreements and other relevant topics are available via the GAIN system where you will find useful reports such as the FAIRS Country Report Annual and Food and Agricultural Import Regulations and Standards (FAIRS) Export Certificate report. Information from the U.S. Commercial Service regarding its simplified export process can be found here, and relevant information about the U.S.-Mexico-Canada Agreement (USMCA) can be reviewed here.

Customs Clearance

Mexico's customs clearance is overseen by the Ministry of Finance (SHCP) through the Tax Administration Service (SAT) and the National Customs Agency (ANAM). SAT authorizes customs brokers to manage clearance procedures, and only legally registered Mexican companies can appear in the official Importers' Registry (Padrón de Importadores). This means U.S. exporters must work with a registered Mexican importer to legally bring goods into the country. In addition, Mexican customs law[10] mandates that commercial importers use a licensed customs broker to handle the import process for most commercial products. Hiring an inexperienced or unlicensed customs broker can lead to customs rejection, delays, fines, and even seizure of goods.

The process includes verifying regulatory compliance, submitting documentation, paying applicable duties, and obtaining customs approval. Required documents typically include a commercial invoice, certificate of origin, sanitary or phytosanitary certificates, and other technical and commercial details. The customs broker submits an Import Declaration (Pedimento de Importación) based on this information. Certain products, such as infant formula or processed foods with health claims, may also require prior approval from the Federal Commission for the Protection against Sanitary Risks (COFEPRIS). Importers are responsible for notifying exporters of all documentation and permit requirements. For new-to-market exporters, working with an experienced importer and customs broker is key to avoiding delays, compliance issues, and shipment holds at the border.

Country Language Labeling Requirements

Importers are responsible for informing exporters about labeling requirements. Since October 2020, Mexico has implemented front-of-pack (FOP) nutrition warning labels under revised NOM-051 regulations. Packaged foods high in calories, sugar, sodium, or saturated fat must display black octagonal warning signs to alert consumers. U.S. exporters of processed foods and non-alcoholic beverages must work closely with importers to ensure their Spanish-language labels meet these requirements. Non-compliant products cannot be sold in the Mexican market.

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[10] Ley Aduanera (Customs Law), Article 164

The use of adhesive tags/stickers to display the required information in Spanish over original English language labeling is permitted if they remain adhered to the package until the product reaches the end consumer. New exporters should plan in advance for the time and cost of label redesign or stickering and translation to avoid costly delays at the border. Many U.S. exporters either print Spanish-language labels or coordinate with the importers to apply compliant stickers to items before or upon arrival. Required information includes product name, description, nutrition facts, ingredients (with allergens highlighted), nutrition warning labels (if applicable), net weight, expiration date (DD/MM/YY), country of origin, and Mexican importer's name and address, all of which must be displayed in Spanish. Please review our FAIRS Country Report Annual for additional labeling requirements.

Tariffs and Free Trade Agreements (FTAs)

Mexico is an open market, with 14 free trade agreements across over 50 countries. The most important for U.S. exporters and Mexican buyers is the USMCA, under which almost all U.S. food and agricultural products enter Mexico duty-free, giving them a price advantage, or at least parity with non-FTA countries. A few products still face tariff-rate quotas or transition rules, but overall, the tariff environment remains highly favorable. To benefit from zero tariffs, products must meet USMCA rules of origin. Items that do not qualify, such as processed foods with significant non-North American inputs, may face Mexico's Most-Favored-Nation (MFN) duties, typically 10–20 percent. Failure to claim USMCA benefits can lead to unnecessary costs for importers.

U.S. exporters should also monitor Mexico's Anti-Inflation Decree, which temporarily removes tariffs on select foods from non-FTA countries. The decree has enabled competitors like Brazil and Argentina to gain market share in some categories, such as poultry and beef, reducing the U.S. advantage. Still, when used strategically, the tariff preferences under USMCA, combined with short and increasingly integrated supply chains, remain a core strength for U.S. exports.

Trademarks and Patents / Market Research

Protecting intellectual property is critical when entering the Mexican market. U.S. trademarks do not carry legal weight in Mexico, and Mexican law follows a first-to-file system, meaning whoever registers a trademark first gains the rights, regardless of prior use. Cases of "bad faith" registrations by local entities are not uncommon. To avoid legal disputes, U.S. exporters should register their trademarks early with the Mexican Institute of Industrial Property (IMPI), ideally before product launch or distribution. Once registered, trademarks offer nationwide protection and can be renewed every ten years. Patents in Mexico are valid for 20 years from the filing date, in line with international norms.[11] Under USMCA, Mexico has improved its IP legal framework

[11]Mexico is an adherent to the World Trade Organization's TRIPS Agreement.

and enforcement tools. However, practical enforcement remains difficult, legal proceedings can be slow, and counterfeit goods are still common. For food exporters, brand names, logos, and even product formulations are valuable assets worth protecting. Early trademark registration and legal counsel for novel or proprietary products can help avoid costly barriers to market entry.

FAS Mexico, in coordination with U.S. agricultural cooperators and SRTGs, provides valuable market research to help exporters understand consumer trends, price points, competitor presence, and channel preferences. These insights can help U.S. companies tailor products, packaging, and messaging for success in Mexico. Exporters should also consult the GAIN system, which includes regularly updated reports on regulations, market structure, and sector-specific insights. Additional support is available through the U.S. Department of Commerce, which offers tools on Mexican import requirements and business practices. Regular communication with the importer is essential, as they often receive early notice of regulatory updates. Combining consumer research with regulatory awareness will help U.S. suppliers remain competitive and compliant.

Section IV: Market Sector Structure and Trends

Understanding Mexico's import procedures and regulatory landscape is only one part of developing a successful export strategy. Equally important is identifying which segments of the Mexican food industry offer the strongest opportunities, and how emerging consumer trends shape demand in retail, food service, and food processing channels. This section provides introductory context of each sector to guide U.S. exporters in identifying the best market entry strategies.

Mexico's geographic proximity to the United States and integrated supply chains makes all three sectors viable for U.S. exporters. However, the most accessible opportunities for new-to-market companies are typically in the retail and food service sectors, due to their scale, diversification, and familiarity with imported products. Retailers are actively seeking differentiated and health-oriented offerings that keep prices attractive, while food service buyers value high-quality, consistent ingredients for premium menus. Food processors might require more technical specifications and documentation in the beginning but offer long-term potential for ingredient suppliers.

Retail Sector

Mexico's retail sector remains strong, with an estimated value of over $667.74 billion in 2025[12] , and offers a variety of market opportunities for U.S. agricultural exporters. While modern retail continues to expand, more than 50 percent of food purchases in Mexico occur through traditional channels like mom-and-pop shops and open-air markets. Top national retailers include Walmart, Soriana, Grupo Chedraui, and Grupo La Comer, as well as regional players like HEB, Casa Ley,

[12] Mordor Intelligence

Calimax, Alsuper, S-Mart, and Merza. Club stores like Costco and Sam's Club also play a major role in the mid-to-premium market segment. Hard discount chains like 3B and Neto are rapidly expanding, especially in price-sensitive areas, offering limited selection of low-cost staple products. They increasingly compete with traditional retail, reshaping the retail landscape for basic food and household items. Their reliance on private-label products also creates opportunities for U.S. ingredient suppliers serving the food processing sector.

Urbanization, social media influence, and evolving lifestyles are increasing consumer interest in healthier, more convenient, and premium food products. Retailers are responding by expanding organic, healthy, and ready-to-cook product lines. Private label is also growing, offering affordable alternatives and often featuring imported U.S. ingredients, which are considered consistent, high-quality, and safe. E-commerce continues to expand, particularly in urban centers, with stores developing their grocery delivery apps and using third-party apps like Uber Eats, Rappi, and Didi all becoming integral to the food retail sector. For more information on this sector, please review our latest Retail Foods Report.

Food Service – Hotel Restaurant and Institutional (HRI) Sector

Mexico's food service sector continues to benefit from strong tourism and rising domestic consumption. In 2025, international arrivals reached 47.8 million, up 6.1 percent from 2024. Most visitors came from the United States, Canada, and Argentina, and they typically stay in major hotels and dine at chain restaurants, which often source imported U.S. meat, dairy, condiments, beverages, seafood, wine, and other processed foods. This sustained demand from the hospitality sector reinforces opportunities for U.S. exporters, particularly those offering high-quality, value-added products that align with international visitor expectations.

Mexico's restaurant industry is highly segmented, with over 773,000 registered food and beverage establishments and an estimated 60,000 registered in delivery platforms like Uber Eats. While informal vendors still dominate everyday food consumption, the formal sector includes major players such as Alsea (VIPS, Domino's Pizza, Starbucks, and soon Chipotle), Gigante (Shake Shack, Toks, Panda Express), Brinker (Chili's), Carso (Sanborn's) and DineBrands (Applebee's, IHOP). Many of these chains incorporate imported ingredients, particularly U.S. products.

American cuisine and food culture remain highly influential, and emerging trends, such as health-conscious dining and food delivery platforms, continue gaining traction in major cities. These shifts open new opportunities for U.S. exporters of innovative ingredients, convenience foods, and specialty products tailored to evolving consumer preferences. Please see our latest Food Service – Hotel Restaurant Institutional Report for a deeper look into this sector.

Food Processing Sector

Mexico has the second-largest food processing industry in Latin America, after Brazil, with more than 231,000 companies[13] manufacturing food and beverages, from multinational firms to local Small and Medium Enterprises (SMEs). Large processors dominate shelf-stable, frozen, and snack foods, while SMEs often lead in artisanal or regional products like cheeses or salsa.

Growing demand for healthier, ready-to-eat, and innovative foods is driving reformulation and product development in the food processing sector. U.S. ingredients are favored for their quality, consistency, and compliance with local regulations. Trends toward sustainability, clean labels, and functional ingredients present strong opportunities for U.S. exporters of premium inputs like natural flavorings, meat cuts, and specialty dairy ingredients. Key players such as Grupo Bimbo, Coca-Cola, Sigma Alimentos, and Gruma lead the market and influence sourcing decisions. This evolving landscape offers U.S. suppliers a strategic opening to provide value-added ingredients, capitalize on reformulation trends, and build long-term relationships with leading processors. For more information about this sector, see our Food Processing Ingredients Report.

Competition Challenges

The United States is by far Mexico's top supplier with 67 percent market share. Mexico's second and third largest suppliers in 2025, the European Union and Brazil, trailed behind with 10 and 6 percent market share, respectively. However, U.S. products face growing competition from third-country exporters. Canada benefits from similar trade preferences under USMCA and is strong in products like pork, rapeseed oil, and pulses. Brazil and Argentina have gained ground in commodities such as beef, poultry, and black beans, often undercutting U.S. prices. European Union countries (notably Ireland, Spain, and the Netherlands) continue expanding their footprint in beverage ingredients, premium processed foods, wine, and cheese. Chile, Peru, and New Zealand remain strong in products like fruit, dairy, and wine. Competitive pressures are expected to intensify as Mexico diversifies its import portfolio and consumers seek value and novelty in product offerings.

Section V: Agricultural and Food Imports

Mexico remains one of the world's most dynamic importers of food and agricultural products, reflecting strong consumer demand, an expanding middle class, and integration with global supply chains. In 2025, Mexico's total food and agricultural imports surpassed $45 billion, with $13 billion in bulk commodities, $10 billion in intermediate commodities, and $22 billion in consumer-oriented products.

[13] DENUE INEGI

Table 2: Growing Consumer-Oriented Product Exports to Mexico

	Commodity Group	Growth in Mexico Imports (by value), 2021-2025	Mexico Imports from the United States, 2025 (USD)	U.S. Main Market Share Competitors, 2025
1	Pork & Pork Products	79%	$3.4 billion	Canada, Brazil
2	Soup & Other Food Preparations	6%	$1.3 billion	Spain, Italy
3	Poultry, Meat and Products	37%	$1.4 billion	Brazil, Chile
4	Beef & Beef Products	91%	$1.3 billion	Brazil, Canada
5	Cheese	55%	$739.5 million	Netherlands, Chile, New Zealand
6	Chocolate & Cocoa Products	40%	$353.6 million	Canada

Source: Trade Data Monitor, LLC.

While the United States remains Mexico's dominant supplier across most categories, third-country competitors are increasingly active, and evolving consumer trends are reshaping product demand. This section highlights key trade patterns and opportunities for U.S. exporters to maintain and grow market share. Table 3 shows Mexico's top agricultural imports from the world in 2025.

Table 3: Mexico's Top Five Agricultural Imports from the World in 2025

	Commodity Group	Category	Mexico's Global Imports Value (USD) 2024	Mexico's Global Imports Value (USD) 2025	Main Supplier 2025	Second Supplier 2025
1	Corn	Bulk Agricultural	$5.2 billion	$3.3 billion	United States	N/A
2	Meat of Swine, hams, shoulders and cuts thereof, with bone in, fresh or chilled	Consumer Oriented	$2.4 billion	$2.8 billion	United States	Canada
3	Dairy Products	Intermediary & Consumer Oriented	$2.4 billion	$2.5 billion	United States	New Zealand
4	Meat of Bovine Animals, Boneless, Fresh or Chilled	Consumer Oriented	$1.1 billion	$1.3 billion	United States	Canada
5	Soybeans	Bulk Agricultural	$1.4 billion	$1.1 billion	United States	Brazil

Source: Trade Data Monitor, LLC.

In 2025, Mexico imported $30.6 billion in agricultural products from the United States (see Table 4), with consumer-oriented products being the largest category valued at $15 billion, up 3.4 percent from the previous year. Please see Appendix I for a more detailed breakdown of U.S. agricultural exports to Mexico over the last five years.

Table 4: U.S. Agricultural Product Exports to Mexico, 2021-2025

Product Category	USD				
	2021	2022	2023	2024	2025
Consumer Oriented	$10.8 billion	$11.9 billion	$12.8 billion	$14.5 billion	$15.0 billion
Bulk	$9.8 billion	$11.4 billion	$10.4 billion	$10.3 billion	$10.6 billion
Intermediate	$4.9 billion	$5.2 billion	$5.2 billion	$5.5 billion	$5.0 billion
Grand total	$25.5 billion	$28.5 billion	$28.4 billion	$30.3 billion	$30.6 billion

Source: USDA Global Agricultural Trade Data (GATS)

Overall, U.S. exporters are well-positioned to capitalize on Mexico's demand for high-quality, reliable, and value-added food and agricultural products. However, continued success depends on understanding consumer shifts, addressing cost competitiveness, and navigating regulatory and logistical considerations. The growth in categories like cheese, pork, chocolate, and pet food reflects broader themes in this report: health-driven reformulations, convenience, brand familiarity, and the strength of modern retail and food service channels. Exporters that align with these trends while leveraging USMCA benefits will remain competitive in this market.

Section VI: Key Contacts and Further Information

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For information on USDA programs see here. For general information on FAS services consult the FAS website. Government agencies in Mexico are responsible for policies regarding food and imports, said agencies are:

1. Mexico's Customs National Agency ANAM

2. Federal Commission for the Protection against Sanitary Risks COFEPRIS

3. Catalogue of Official Mexican Standards (Normas Oficiales Mexicanas) NOMs

4. Mexico's Ministry of Agriculture and Rural Development SADER

5. Mexico's Tax Authority SAT

6. Mexico's Ministry of Economy SE

7. National Department of Health, Food Safety and Food Quality SENASICA

8. Mexico's government website regarding TMEC (USMCA) TMEC website (USMCA)

9. Mexican Institute of Industrial Property IMPI

Appendix I.

United States Exports to Mexico
Agricultural & Related Products
Calendar Year: 2021-2025 and January-December: 2025,2026
(in millions of dollars)

Export Market: Mexico

	Calendar Year (January-December)				
Product	**2021**	**2022**	**2023**	**2024**	**2025**
Bulk Total	9,834.79	11,381.52	10,366.64	10,270.52	10,576.93
Wheat	1,293.02	1,584.56	1,080.51	1,047.78	1,148.85
Corn	4,731.48	4,963.44	5,373.08	5,561.79	5,968.70
Coarse Grains (ex. corn)	51.57	110.08	33.43	14.96	159.89
Rice	306.37	218.76	281.43	441.75	222.67
Soybeans	2,622.30	3,642.26	2,791.09	2,302.20	2,309.73
Rapeseed	0.28	0.46	7.73	44.68	97.81
Oilseeds NESOI	30.19	20.65	39.81	36.44	23.47
Cotton	406.98	527.79	250.65	242.54	213.14
Peanuts	130.96	144.17	171.46	156.39	187.86
Pulses	177.42	120.93	286.03	365.20	206.39
Coffee, Unroasted	0.04	0.46	0.11	2.31	0.28
Cocoa Beans	0.00	0.00	0.07	0.02	0.00
Tobacco	72.27	33.01	40.64	42.63	26.87
Other Bulk Commodities	11.92	14.96	10.59	11.83	11.27
Intermediate	4,880.05	5,163.60	5,174.33	5,457.15	5,035.12
Soybean meal	840.98	862.65	824.10	896.71	818.98
Oilseed Meal/Cake (ex. soybean)	14.67	12.17	15.31	14.83	8.18
Other Feeds & Fodders	293.49	319.22	335.05	330.70	295.83
Soybean Oil	87.08	114.85	65.02	105.03	218.02
Palm Oil	0.79	2.43	1.91	10.51	14.29
Vegetable Oils NESOI	303.62	322.63	276.41	194.47	235.08
Distillers Grains	634.52	726.09	675.54	636.46	508.35
Hay	0.59	0.60	0.77	0.73	0.94
Live Animals	187.88	192.22	137.53	119.30	121.22
Milled Grains & Products	489.82	480.55	527.44	565.73	473.45
Hides & Skins	128.05	128.30	120.41	78.23	72.51
Industrial Alcohols & Fatty Acids	155.80	190.17	144.81	142.63	144.55
Animal Fats	403.57	259.93	186.54	148.34	180.69
Dextrins, Peptones, & Proteins	136.60	148.29	163.01	173.73	165.10
Essential Oils	183.45	177.82	177.49	194.95	203.37
Ethanol, incl. bev.	140.12	203.55	226.40	259.27	231.34
Planting Seeds	197.88	226.15	247.12	269.83	296.84
Sugars & Sweeteners	534.06	651.78	892.77	1,197.65	917.11
Other Intermediate Products	147.07	144.21	156.71	118.05	129.26
Consumer-Oriented	10,751.34	11,921.76	12,779.60	14,474.42	15,020.95
Bakery Goods, Cereals, & Pasta	394.49	415.52	488.73	608.48	595.21
Beef & Beef Products	962.60	865.89	1,063.59	1,233.30	1,196.29
Beer	27.76	24.62	13.14	1.90	2.27
Pork & Pork Products	1,624.90	1,980.65	2,266.72	2,505.83	2,782.31
Poultry Meat & Prods. (ex. eggs)	1,179.94	1,087.58	1,078.10	1,280.56	1,311.84
Chewing Gum & Candy	49.54	61.14	85.91	106.29	95.18
Meat Products NESOI	381.77	409.52	497.49	494.90	554.82
Mfg. Tobacco	10.04	11.75	13.86	49.69	171.16
Eggs & Products	215.24	194.11	218.76	169.31	170.86
Dairy Products	1,793.15	2,458.38	2,347.20	2,499.96	2,604.00
Fresh Fruit	747.54	734.61	822.67	978.84	995.57
Processed Fruit	243.05	212.16	205.14	253.09	282.54

Product	Calendar Year (January-December)				
	2021	2022	2023	2024	2025
Fresh Vegetables	233.24	284.42	315.90	404.71	323.59
Processed Vegetables	487.05	522.62	601.31	647.36	522.25
Soup & Other Food Preparations	877.92	964.19	1,044.79	1,336.05	1,414.29
Fruit & Vegetable Juices	32.00	22.86	27.90	38.67	40.83
Tree Nuts	334.05	397.66	331.99	358.72	371.73
Wine & Related Products	23.65	29.59	26.03	25.40	27.14
Chocolate & Cocoa Products	250.11	244.04	276.42	362.73	384.41
Condiments & Sauces	320.52	390.64	411.62	415.03	426.85
Spices	10.25	12.85	11.05	13.12	15.40
Tea	38.96	46.52	47.75	59.84	52.84
Coffee, Roasted and Extracts	41.37	61.94	56.76	58.43	70.94
Non-Alcoholic Bev. (ex. juices, coffee, tea)	171.10	141.57	152.08	163.15	166.77
Dog & Cat Food	164.64	177.93	206.27	234.43	260.62
Distilled Spirits	45.09	55.35	56.48	60.62	67.45
Nursery Products & Cut Flowers	91.37	113.64	111.95	114.00	113.81
Ag Related Products	1,041.68	1,185.17	1,088.40	969.40	888.66
Biodiesel & Blends > B30	2.47	0.24	0.31	0.04	0.74
Forest Products	953.61	1,087.74	979.17	853.09	805.22
Seafood Products	85.61	97.18	108.92	116.27	82.70
Agricultural Products	25,421.09	28,411.53	28,264.09	30,141.46	30,565.54
Agricultural & Related Products	26,462.77	29,596.70	29,352.49	31,110.87	31,454.21

Attachments:

No Attachments