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Report Highlights:

Improved dam levels and increased demand for local white corn and rice are expected to drive up production in marketing year 2025/2026. Sorghum and wheat production are projected to decline due to weaker price expectations. Higher corn production is likely to stabilize imports, even as domestic demand remains robust. Imports of wheat, rice, and sorghum are forecast to increase, as production is unable to meet rising consumption.

EXECUTIVE SUMMARY

Grain demand in the marketing year (MY) 2025/2026 is expected to remain strong, supported by population growth and expansion in the cattle, swine, and poultry sectors. Mexico is expected to remain a major grain importer as domestic production remains insufficient to meet growing food and feed needs.

Mexico's corn production is forecast to recover by eight percent to 25.0 million metric tons (MMT), driven by higher local white corn prices compared to other grains, favorable weather, and gradual recovery of reservoirs following drought conditions in Sinaloa for two consecutive years. However, forecast production remains three percent below the five-year average as major producing states work to restore planted areas and improve yields. Higher domestic output is expected to keep imports steady at 25.0 MMT.

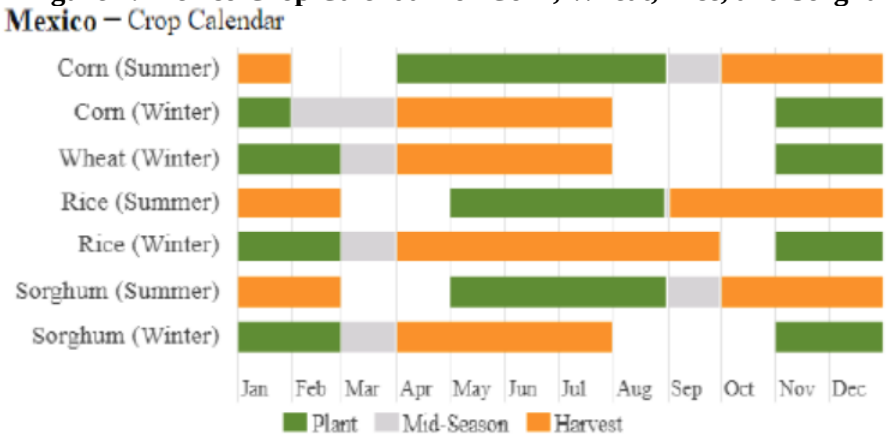
Wheat production is forecast down 34 percent to 1.75 MMT due to low reservoir levels in Sonora and weaker prices. Imports are projected up 18 percent to 6.5 MMT, while exports are forecast down 26 percent to 100,000 metric tons (MT) on reduced durum output.

Rice production is forecast four percent higher at 177,000 MT, supported by population growth and increased demand for local rice. Imports are expected to increase by two percent to 895,000 MT, reflecting importers' expectations of higher milling of paddy rice.

Sorghum production is forecast down two percent to 4.0 MMT on weaker profitability and prices. Imports are projected up 36 percent to 750,000 MT due to tighter supplies and price competitive U.S. sorghum.

The following calendar reflects Mexico's corn, wheat, rice, and sorghum crop cycles.

Figure 1: Mexico Crop Calendar for Corn, Wheat, Rice, and Sorghum



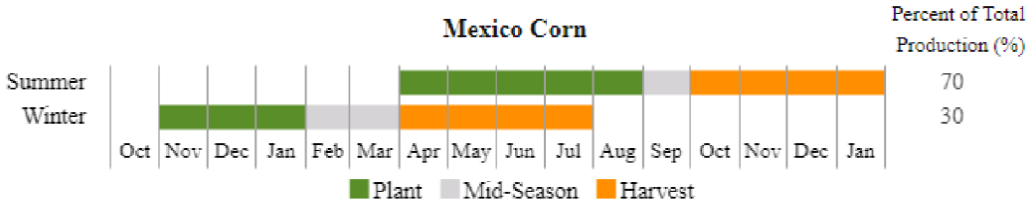
CORN

Table 1: Mexico, Corn Production, Supply and Distribution

Corn	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Mexico	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	6109	6109	6500	6500	6500	6600
Beginning Stocks (1000 MT)	4877	4877	5786	5786	5666	5761
Production (1000 MT)	23710	23710	23100	23200	24800	25000
MY Imports (1000 MT)	24222	24222	25000	25000	25800	25000
Total Supply (1000 MT)	52809	52809	53886	53986	56266	55761
MY Exports (1000 MT)	23	23	20	25	20	30
Feed and Residual (1000 MT)	25800	25800	26900	26900	29000	28300
FSI Consumption (1000 MT)	21200	21200	21300	21300	21500	21500
Total Consumption (1000 MT)	47000	47000	48200	48200	50500	49800
Ending Stocks (1000 MT)	5786	5786	5666	5761	5746	5931
Total Distribution (1000 MT)	52809	52809	53886	53986	56266	55761
Yield (MT/HA)	3.8812	3.8812	3.5538	3.5692	3.8154	3.7879

(1000 HA), (1000 MT), (MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Corn begins in October for all countries. TY 2025/2026 = October 2025 - September 2026

Figure 2: Mexico Corn Crop Calendar



Production

MY 2025/2026

Mexico's MY 2025/2026 (October–September) corn production is forecast up eight percent to 25.0 MMT, supported by above-average precipitation that has replenished reservoirs in Sinaloa ahead of the fall/winter cycle. Planted area is forecast to rise two percent to 6.6 million hectares (HA), as higher reservoir levels in Sinaloa are expected to increase water permits.

In the northwest, particularly Sinaloa where production is largely irrigated, favorable rainfall and relatively competitive prices are expected to incentivize planting. Despite the projected increase, production remains below average after two years of drought-reduced output. Structural constraints—including irrigation limits, restricted financing, rising insecurity, and competition from higher-value horticultural crops—continue to limit further expansion.

Spring/Summer Corn

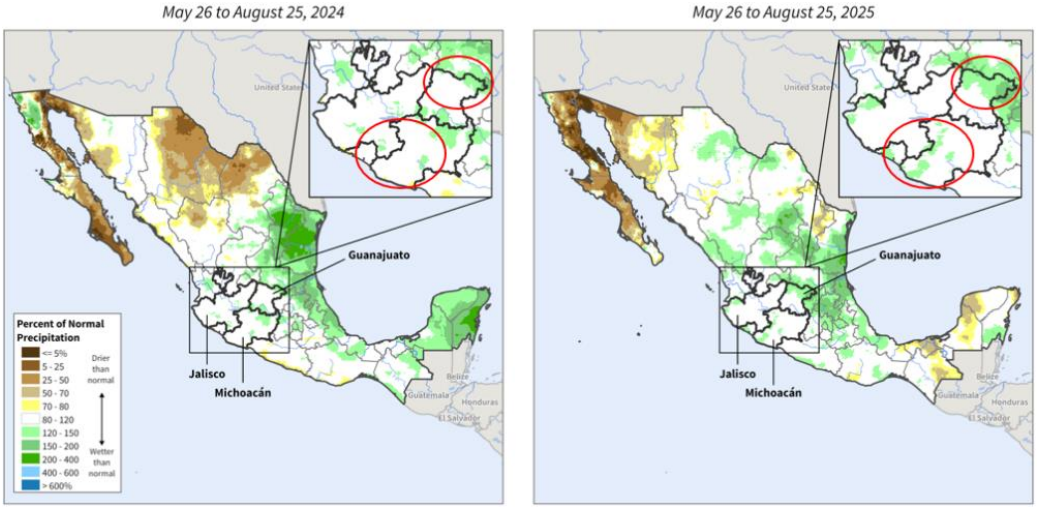
Spring/summer corn planting is expected to conclude by late September. Planting is largely complete in major producing states, with most activity occurring June–August under average rainfall and adequate soil moisture, according to the National Water Commission (CONAGUA). Roughly 85 percent of spring/summer corn is

rainfed, consistent with historical trends. Producers in key states remain optimistic about yields given favorable weather during growth stages.

As of July 31, Mexico's Agricultural and Fisheries Information Service (SIAP) reported 4.7 million HA planted. In major producing states, Jalisco (234,189 HA), Guanajuato (287,865 HA), Michoacán (393,025 HA), Estado de México (460,000 HA), and Chihuahua (220,000 HA), planted area totaled 1.6 million HA, a figure expected to rise in subsequent updates due to earlier moisture delays.

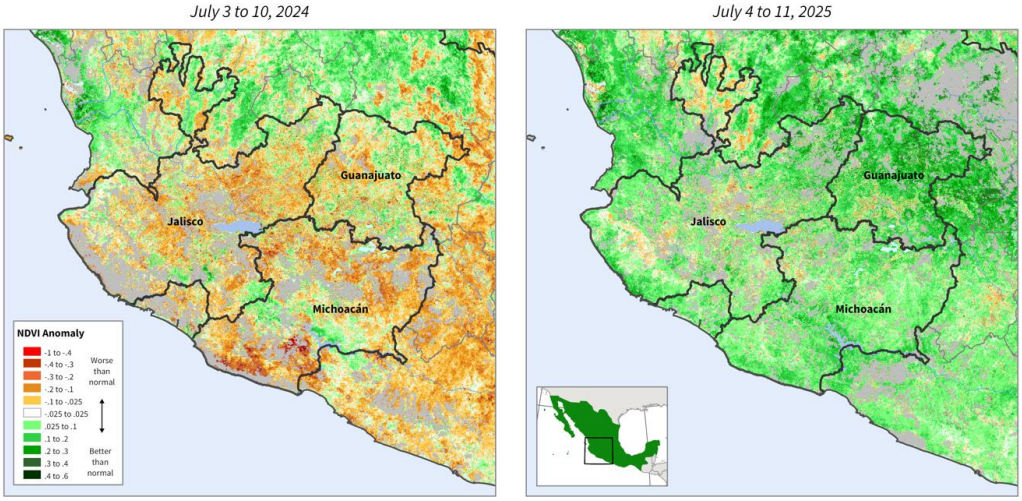
Chihuahua planted 197,000 HA of yellow corn and 23,000 HA of white corn. Harvest began in September with yields of 14.0 MT/HA (yellow) and 12.8 MT/HA (white). More than half the area is irrigated and planted from April through May; the rest is rainfed and planted from June through August.

Figure 3: Mexico's Percent of Normal Cumulative Precipitation, May 26 to August 25, 2025



Source: USDA FAS International Production Assessment Division (IPAD)

Figure 4: Normalized Difference Vegetation Index Anomaly

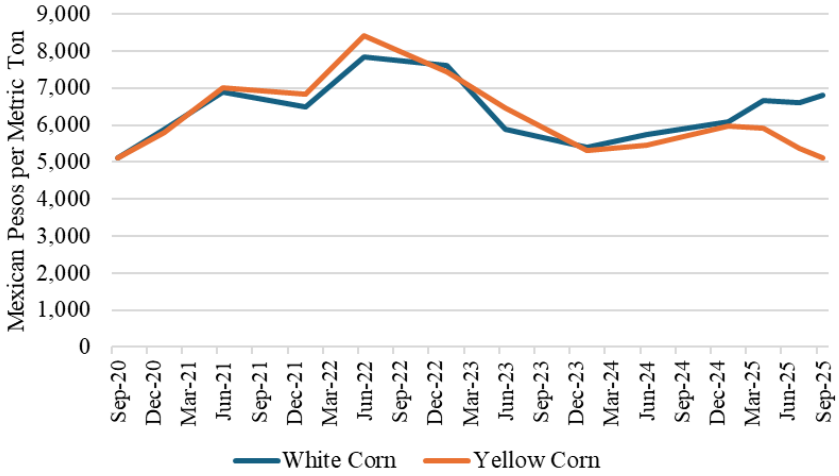


Source: USDA FAS International Production Assessment Division (IPAD)

In September 2025, the National System of Market Information and Integration (SNIIM) reported the farmgate price of white corn in the Bajío region states of Jalisco, Guanajuato, and Michoacán were 18 percent higher than

the previous year at 6,750 Mexican pesos (USD 365) per MT. This price was also 30 percent higher than the farm-gate price of yellow corn. White corn production in MY 2023/24 and MY 2024/25 were below average, reducing ending stocks and widening the price gap with yellow corn. Limited domestic availability, despite higher imports, has led buyers to pay premium prices for local white corn.

Figure 5: Average White and Yellow Corn Farmgate Prices in the Bajío Region

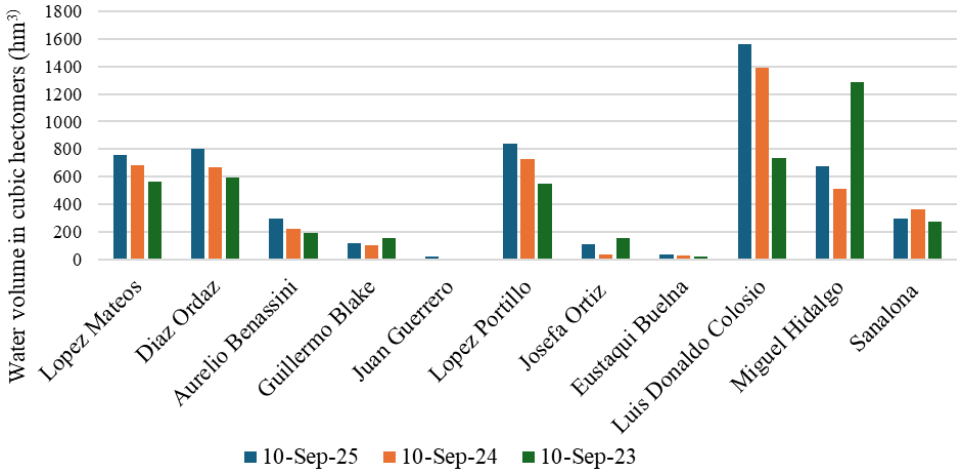


Source: National System of Market Information and Integration of Mexico (SNIIM)

Fall/Winter Corn

SIAP projects an 80 percent increase in planted area to 395,000 HA for 2025/2026 fall/winter corn in Sinaloa. As of September 10, overall dam storage in the state was 16 percent higher than last year. Final water allocations for irrigated corn will be determined in November 2025 by the State Plant Health Committee of Sinaloa (CESAVESIN), based on updated reservoir conditions.

Figure 6: Irrigation Dam Levels in Sinaloa



Source: National Water Commission (CONAGUA)

MY 2024/2025

Total corn production for MY 2024/2025 is estimated to decrease by two percent to 23.2 MMT due to lower yields and limited water availability in key producing regions. The estimate is based on official final

spring/summer harvest data and updated preliminary harvest progress for the fall/winter cycle. Persistently low reservoir levels in irrigated zones—particularly in Sinaloa—and prolonged drought conditions have negatively impacted overall productivity.

Spring/Summer Corn

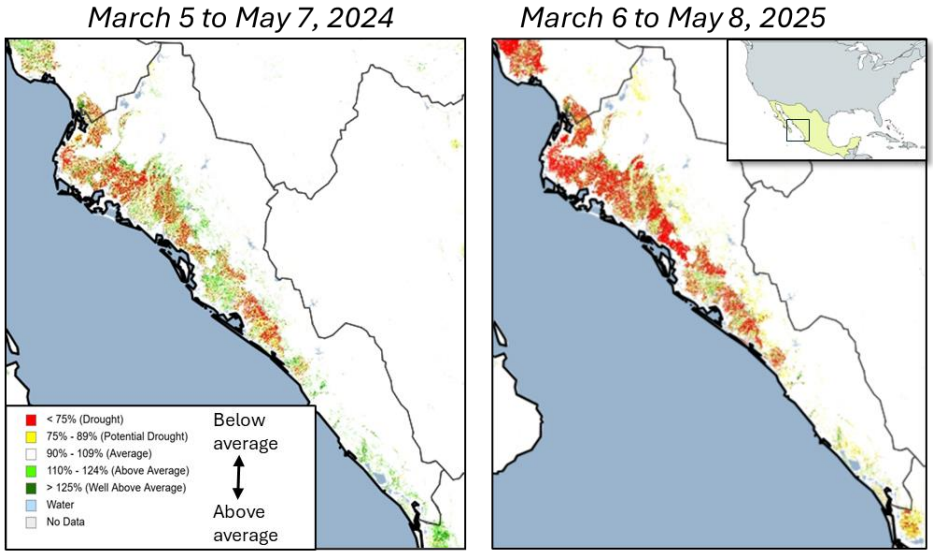
According to final SIAP data, the spring/summer cycle production increased by three percent to 19.2 MMT. Harvested area expanded by nine percent to 5.7 HA. However, average yields declined in major producing states due to irregular rainfall patterns, elevated temperatures, and reduced water availability, especially in northern regions. The cycle produced 16.5 MMT of white corn and 2.7 MMT of yellow corn. White corn output increased by four percent, while yellow corn production declined by five percent due to reduced planted area from more favorable white corn prices.

Fall/Winter Corn

The fall/winter corn harvest concluded in late August with production down 22 percent to 4.0 MMT, driven by drought and limited irrigation in Sinaloa, the leading producer. Harvested area declined three percent to 867,000 HA, while average yields fell 19 percent to 4.65 MT/HA.

In Sinaloa, production dropped 34 percent to 2.2 MMT as record-low reservoir levels reduced water availability. Harvested area was 21 percent lower at 218,214 HA, with the sharpest declines in irrigation districts 076 Valle del Carrizo and 075 Río Fuerte. Limited irrigation—often just one or two cycles—cut average yields 13 percent to 10.1 MT/HA. While grain quality was good, kernel sizes were below average. About 0.2 MMT was harvested for silage.

Figure 7: Sinaloa Percent of Average Seasonal Greenness in Fall/Winter Corn Reproductive Stage



Source: International Production Assessment Division (IPAD)

On August 22, the federal government announced a support program to boost incomes for small and medium-sized white corn farmers in Sinaloa. The program targets producers affected by two consecutive years of low yields, restricted irrigation, and weak farmgate prices, amid reports of overdue loans and tight liquidity. Under the initiative, the Secretariat of Agriculture and Rural Development (SADER) will provide a one-time payment of

500 pesos (USD 27) per MT of white corn sold, limited to producers with up to 20.0 HA. The program is capped at 400,000 MT.

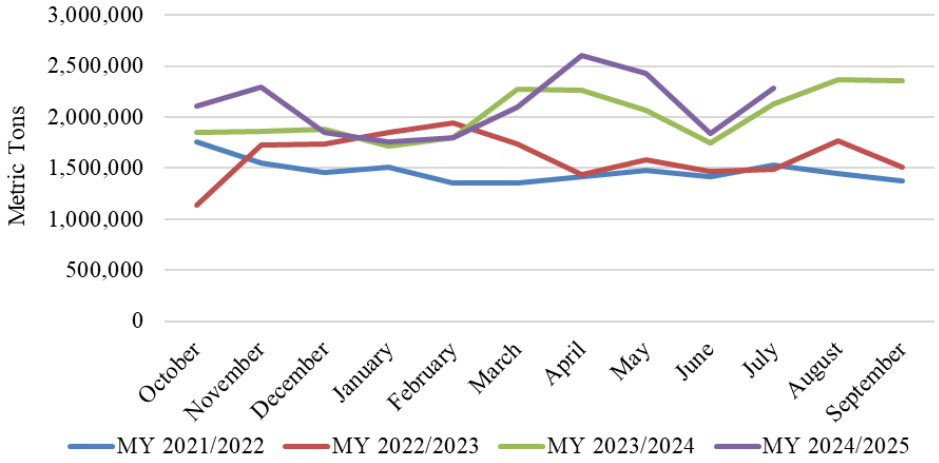
In Veracruz, corn production fell nine percent to 451,000 MT on a stable area of 205,000 HA, as average yields dropped 13 percent to 2.2 MT/HA due to reduced soil moisture during key growth stages. Over 90 percent of production uses native varieties for subsistence and local consumption. In Chiapas, output decreased two percent to 194,848 MT as yields declined modestly to 1.75 MT/HA, with planted area largely unchanged. About 80 percent of corn is planted with native varieties for subsistence use. In contrast, Tamaulipas' production rose 68 percent to 335,000 MT, driven by a 64 percent expansion in area to 70,600 HA (60,000 HA irrigated; 10,600 HA rainfed), with more than 90 percent planted to hybrids. The increase reflects a shift from sorghum to corn in response to higher profitability. However, excessive rainfall and humidity during flowering led to high aflatoxin levels in parts of the crop, and some of the grain was reclassified for feed use.

Trade

MY 2025/2026

Corn imports for MY 2025/2026 are forecast stable at 25.0 MMT. Despite higher domestic production, foreign supply is expected to meet feed and processing demand. Early U.S. sales for MY 2025/2026 have already surpassed 6.0 MMT.

Figure 8: Mexico's Corn Imports



Source: Trade Data Monitor

MY 2024/2025

Corn imports in MY 2024/2025 are estimated to increase by three percent to 25.0 MMT, primarily due to below-average domestic production and sustained growth in demand from the livestock and feed sectors. Between October 2024 and July 2025, imports rose eight percent to 21.0 MMT, with U.S. origin corn accounting for 99 percent of imports and Brazil supplying the remaining one percent. Yellow corn comprised 97 percent of imports, while white corn imports represented three percent. U.S. corn continues to support Mexico's feed grain market due to year-round availability, consistent quality, and price competitiveness relative to alternative origins. During the same period, white corn imports from the United States surged 211 percent to 630,000 MT, following reduced domestic output and tight stocks.

Despite higher import volumes, industry sources continue to flag persistent logistical challenges, including rising shipping costs, railway congestion and delays, and security risks affecting grain transport. Approximately 61 percent of corn enters Mexico via rail—primarily through Nuevo Laredo, Tamaulipas, and Ciudad Juárez, Chihuahua—while the remaining 39 percent arrives by vessel, with Veracruz serving as the main port of entry.

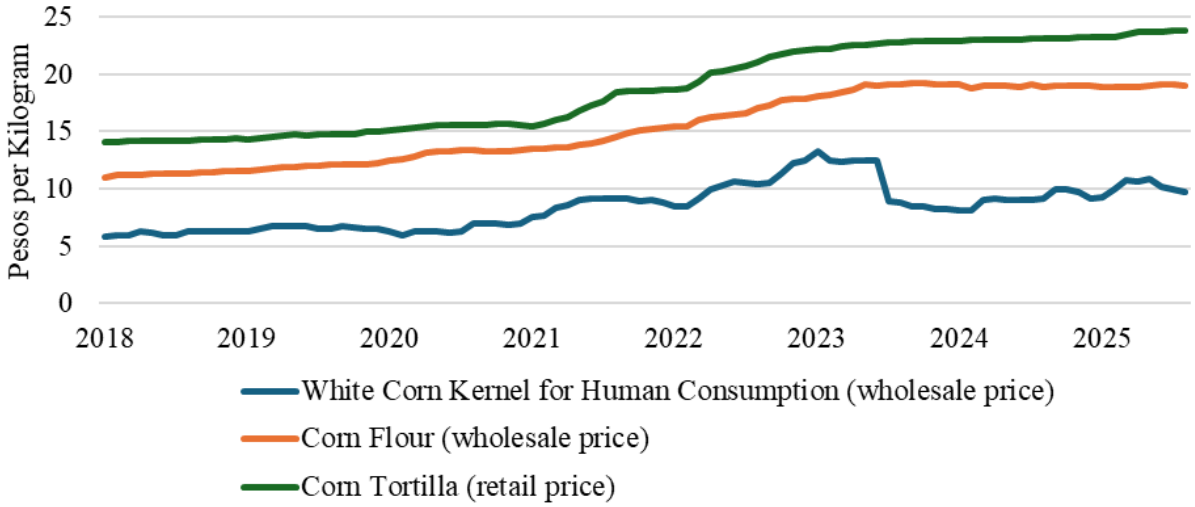
Consumption

Total consumption in MY 2025/2026 is forecast to increase three percent to 49.8 MMT, driven by increased feed demand from the poultry, swine, and cattle sectors. According to the National Council of Feed Producers (CONAFAB), feed production in 2025 is projected to rise by two percent, reaching nearly 42.0 MMT, in response to growth in livestock output. Additionally, the U.S. suspension of imports of live cattle, horses, and bison from Mexico due to the northward spread of New World Screwworm (see: GAIN MX2025-0035) is expected to increase domestic feed demand, as more head of cattle remain in-country for finishing.

Consumption in MY 2024/2025 is estimated to rise three percent to 48.2 MMT, supported by continued growth in feed and livestock demand. Corn remains the primary feed ingredient, accounting for an estimated 18.4 MMT (44 percent) of total feed use, including 16.9 MMT of imported yellow corn. Feed market share by species is distributed as follows: broilers (28 percent), egg layers (19 percent), swine (17 percent), dairy cattle (16 percent), feedlot cattle (11 percent), pets (three percent), aquaculture (one percent), and other species (five percent). Mexico operates 623 feed plants nationwide, with a total installed capacity of 47.4 MMT and a current utilization rate of 88 percent.

On July 28, 2025, the federal government launched a registration call for all formally established tortilla bakeries (*tortillerias)* to join the National Corn Tortilla Agreement, aimed at reducing tortilla prices by at least five percent over the next six months. Participating *tortillerías* will be eligible for: a) direct access to white corn from farmers (up to 25,000 MT) at a fixed price of 6,000 pesos (USD 320); b) discounts on corn flour from major processors; and c) expanded access to credit through financial institutions to increase production efficiency.

Figure 9: Average Nationwide Prices in Mexico of White Corn, Corn Flour, and Corn Tortilla



Source: National System of Market Information and Integration (SNIIM)

Industry sources indicate that the agreement does not address the primary cost drivers affecting *tortillerías*—particularly labor, fuel, and security-related expenses and may limit its impact on corn tortilla prices. Gradual

price increases could constrain corn tortilla consumption among lower-income households, especially in urban areas where price sensitivity is highest.

Stocks

Corn ending stocks in MY 2025/2026 are forecast to increase by three percent to 5.9 MMT, driven by expected higher domestic production and continued investment in storage infrastructure. Stocks are held by millers, farmers, grain traders, and warehouse operators. Storage capacity is expanding in response to sustained growth in feed demand and the need for improved post-harvest grain handling. Industry sources highlight ongoing development of storage facilities, particularly in high-consumption regions associated with poultry, swine, and cattle production.

In MY 2024/2025, ending stocks are estimated slightly lower at 5.8 MMT, reflecting strong feed demand and use of inventories to meet consumption needs.

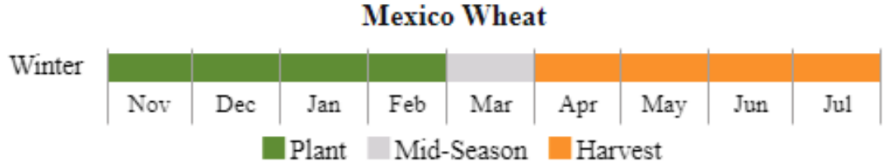
WHEAT

Table 2: Mexico, Wheat Production, Supply and Distribution

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Mexico	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	560	560	468	468	320	320
Beginning Stocks (1000 MT)	757	757	775	775	819	817
Production (1000 MT)	3476	3476	2648	2648	1750	1750
MY Imports (1000 MT)	5292	5292	5531	5529	6700	6500
Total Supply (1000 MT)	9525	9525	8954	8952	9269	9067
MY Exports (1000 MT)	850	850	135	135	100	100
Feed and Residual (1000 MT)	200	200	300	200	350	200
FSI Consumption (1000 MT)	7700	7700	7700	7800	8000	7900
Total Consumption (1000 MT)	7900	7900	8000	8000	8350	8100
Ending Stocks (1000 MT)	775	775	819	817	819	867
Total Distribution (1000 MT)	9525	9525	8954	8952	9269	9067
Yield (MT/HA)	6.2071	6.2071	5.6581	5.6581	5.4688	5.4688

(1000 HA), (1000 MT), (MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Wheat begins in July for all countries. TY 2025/2026 = July 2025 - June 2026

Figure 10: Wheat Crop Calendar



Production

MY 2025/2026

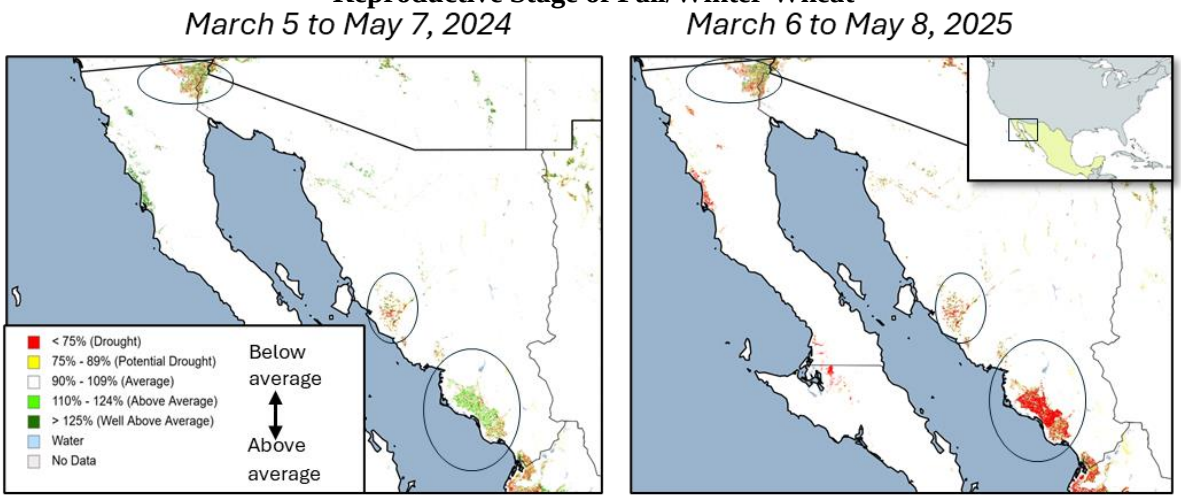
Wheat production in MY 2025/2026 (July–June) is forecast to decline 34 percent to 1.75 MMT, driven by severe drought, historically low reservoir levels, and weak prices. The estimate combines preliminary SIAP harvest data from the fall/winter cycle with spring/summer planting data. Harvested area is projected to fall 32 percent to 320,000 HA, with the largest reductions in Sonora, where limited water, low profitability, and high farm debt discouraged planting.

Fall/Winter Wheat

The fall/winter wheat harvest (April–August) is estimated to decline 35 percent to 1.65 MMT, with harvested area down 36 percent to 266,000 HA. In Sonora, production fell 73 percent to 422,418 MT, representing 25 percent of total wheat output, as harvested area dropped 76 percent to 59,439 HA (32,822 HA bread wheat—mainly Borlaug 100 and Cachanilla F-2000—and 26,617 HA durum wheat—primarily Cirno C2008 and Delta C2021). In southern Sonora, the Yaqui River district fell 77 percent to 173,364 MT, while Mayo Valley declined 62 percent to 206,675 MT. Record-low reservoirs in the Yaqui Valley limited irrigation for a second consecutive cycle, forcing reliance on local aquifers and prompting some farmers to shift to alternative crops such as safflower, chickpeas, and barley. Durum wheat fell 99 percent to 200,000 MT, and bread wheat declined 40 percent to 222,418 MT.

In Baja California, production decreased 10 percent to 187,895 MT on a smaller planted area of 30,632 HA (21,000 HA durum; 9,632 HA bread wheat). Average yields fell three percent to 6.15 MT/HA due to low reservoir levels.

Figure 11: Sonora and Baja California, Mexico Percent of Average Seasonal Greenness During the Reproductive Stage of Fall/Winter Wheat



Source: International Production Assessment Division (IPAD)

In Guanajuato, production increased 116 percent to 408,560 MT, while harvested area rose to 59,542 HA. Farmers expanded wheat production due to improved water availability –particularly in Irrigation district 011 in the Santiago Valley– higher price expectations compared to barley and government support for bread wheat. Government support under the Guaranteed Prices Program is intended for producers with up to 300 MT of wheat production. The program established a guaranteed price of 7,050 pesos (USD 380) per MT for bread wheat, more than 40 percent above the average farmgate price of 5,000 pesos (USD 270). Producers indicate that delayed payments—worth over 2,000 pesos (USD 108) per MT—has directly affected farm incomes and discourages further expansion of planted area.

In Chihuahua, wheat production decreased 43 percent to 86,433 MT due to limited water availability and lower price expectations. Yields declined 11 percent to 5.74 MT/HA. In Michoacán, production increased 28 percent to 151,873 MT, supported by higher water availability for irrigation.

Spring/Summer Wheat

As of July 31, preliminary official data indicates that spring/summer wheat planted area reached 23,836 HA. In Tlaxcala, the planted area reached 8,618 HA, as early heavy rains delayed field access and prevented timely planting. Some farmers switched to oats as an alternative crop due to higher-than-average precipitation in some producing regions. Spring/summer wheat typically represents about three percent of total wheat production.

MY 2024/2025

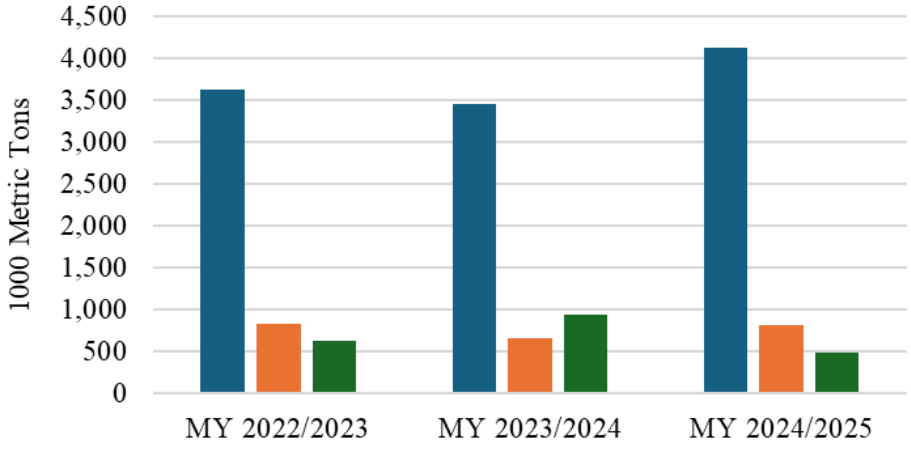
According to official data, wheat production in MY 2024/2025 decreased 24 percent to 2.7 MMT. Fall/winter wheat production declined 25 percent to 2.54 MMT due to prolonged drought and record-low reservoir levels in Sonora and Sinaloa, which reduced both planted area and yields. Average yields fell eight percent to 6.09 MT/HA. Nearly all fall/winter wheat is irrigated. In contrast, spring/summer production increased four percent to 107,197 MT, though this cycle generally accounts for only three percent of total wheat production.

Trade

In MY 2025/2026, wheat imports are estimated to rise 18 percent to 6.5 MMT due to reduced production. Mexico is expected to import approximately 0.3 MMT of durum wheat to offset the sharp decline in domestic production. Exports are forecast to fall 26 percent to 100,000 MT, reflecting limited availability of durum wheat supplies.

Wheat imports in MY 2024/2025 are estimated four percent higher at 5.5 MMT, driven by lower domestic production and rising demand. The United States remained Mexico's top supplier, followed by Canada and Russia. From July 2024 to June 2025, Mexico imported 4.1 MMT from the United States (market share rose from 65 to 75 percent), 811,000 MT from Canada (12 to 15 percent), 491,000 MT from Russia (down from 18 to nine percent), and 96,000 MT from Argentina and other sources. About 71 percent of imports arrived by rail—mainly via Ciudad Juárez and Piedras Negras—and 29 percent by vessel, primarily through Veracruz.

Figure 12: Mexico's Wheat Imports



Source: Trade Data Monitor

Consumption

Wheat consumption in MY 2025/2026 is forecast to increase one percent to 8.1 MMT, supported by population growth. Continued growth in tourism is also expected to marginally contribute to increased demand for wheat-based products such as bread, pasta, and baked goods.

Wheat consumption in MY 2024/2025 is estimated to grow one percent to 8.0 MMT, primarily driven by population growth and higher bread demand. In 2025, Mexico's wheat milling capacity was 11.0 MMT across 94 mills. The Central and Bajío regions account for 54 percent of capacity, followed by the northwest (18 percent), north (15 percent), and south–southeast (13 percent). As of August 2025, the milling sector utilized 69 percent of available capacity, processing 7.6 MMT of wheat into 5.7 MMT of wheat flour and semolina.

Stocks

Ending stocks in MY 2025/2026 are projected to increase six percent to 867,000 MT, supported by higher imports and increased interest among millers in holding larger inventories to offset reduced domestic supplies. Commercial traders and millers maintain wheat stocks in storage facilities and warehouses.

For MY 2024/2025, ending stocks are estimated five percent higher to 817,000 MT, reflecting increased imports. To mitigate supply chain risks, some millers raised inventories to cover more than 20 days of consumption.

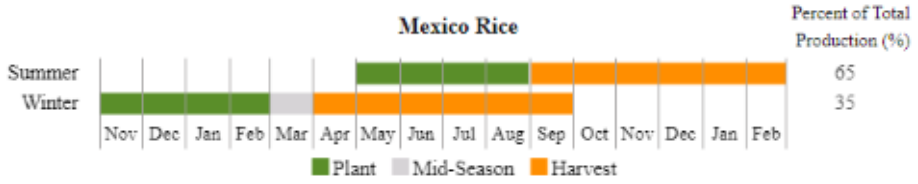
RICE

Table 3: Mexico, Rice Production, Supply, and Distribution

Rice, Milled	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Mexico	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	31	31	36	36	37	37
Beginning Stocks (1000 MT)	120	120	116	116	141	139
Milled Production (1000 MT)	153	153	170	171	177	177
Rough Production (1000 MT)	223	223	247	249	258	258
Milling Rate (.9999) (1000 MT)	6870	6870	6870	6870	6870	6870
MY Imports (1000 MT)	851	851	880	880	895	895
Total Supply (1000 MT)	1124	1124	1166	1167	1213	1211
MY Exports (1000 MT)	18	18	20	23	5	20
Consumption and Residual (1000 MT)	990	990	1005	1005	1020	1020
Ending Stocks (1000 MT)	116	116	141	139	188	171
Total Distribution (1000 MT)	1124	1124	1166	1167	1213	1211
Yield (Rough) (MT/HA)	7.1935	7.1935	6.8611	6.9167	6.973	6.973

(1000 HA), (1000 MT), (MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2025/2026 = January 2026 - December 2026

Figure 13: Rice Crop Calendar



Production

MY 2025/2026

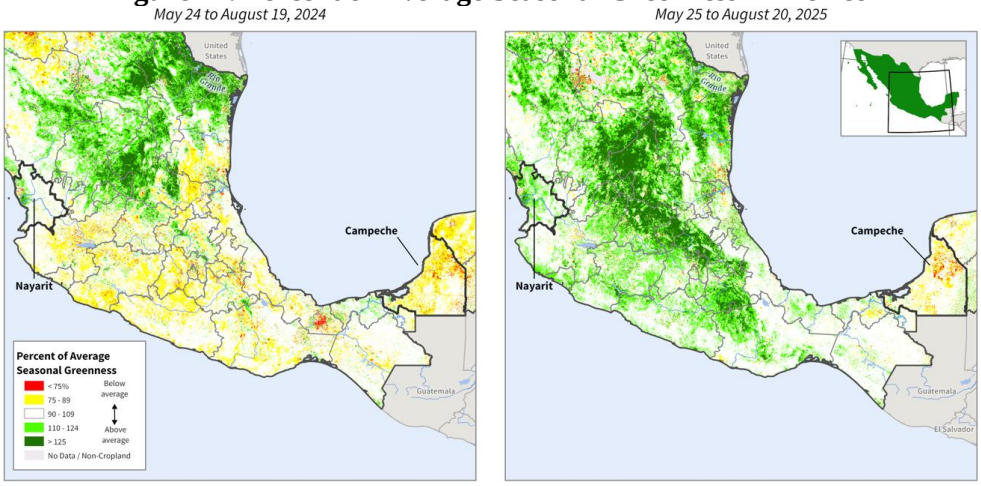
Rice production in MY 2025/2026 (October – September) is forecast to increase four percent to 258,000 MT, equivalent to 177,000 MT of milled rice. Harvested area is expected to rise three percent to 37,000 HA. The increase reflects higher demand for domestic rice. However, this remains seven percent below the ten-year average, as farmers face limited access to credit.

Spring/Summer Rice

The spring/summer rice planting is expected to conclude in September. Planting is complete in key producing states, including Nayarit, Michoacán, and Campeche. According to SIAP, as of July 31, spring/summer rice planted area reached 17,664 HA. Most planting takes place between June through September. Approximately 68 percent of the spring/summer rice is irrigated, primarily with water drawn from local aquifers and surface sources.

In Campeche, planting is complete and planted area expanded to 7,540 HA. In the northeastern municipality of Hopelchén, farmers increased planted area from 105 HA to 3,700 HA. Roughly 70 percent of Campeche's production consists of long-grain varieties, particularly Aztecas, while 30 percent refers to medium-grain (Milagro Filipino). In Nayarit, planting is expected to continue through September, with planted area projected to remain stable at 5,000 HA.

Figure 14: Percent of Average Seasonal Greenness in Mexico



Source: International Production Assessment Division (IPAD)

Fall/Winter Rice

According to SIAP, planting intentions for fall/winter rice are slightly higher, supported by strong regional demand for domestic rice varieties. In Nayarit, producers are optimistic about greater water availability from local rivers for irrigation, driven by higher precipitation, and rising demand from the largest local mill. In Campeche, farmers are expected to marginally expand planted area, encouraged by continued demand for local rice and government support through improved seed distribution and plant health and nutrition packages. In Tamaulipas, planted area is projected to increase, supported by higher precipitation and moisture levels. The state government continues to provide farmers in the southern region with precision seeding equipment on loan to reduce input costs and improve yields. Production during this cycle is almost entirely irrigated and depends heavily on adequate soil moisture, reservoir, and surface water levels.

MY 2024/2025

Rice production in MY 2024/2025 is forecast up 12 percent to 249,000 MT (171,000 MT milled), driven by greater water availability in Tamaulipas and improved varieties in Campeche. In Tamaulipas, above-average summer 2024 rainfall boosted water permits for irrigated rice planted from February to March in the southern region of the state.

Spring/Summer Rice

According to SIAP, production rose two percent to 150,719 MT with an average yield of 6.55 MT/HA. The spring/summer cycle typically accounts for about 70 percent of Mexico's annual rice production.

Fall/Winter Rice

As of August 1, harvested area expanded 31 percent to 10,906 HA, supported by improved irrigation water availability and strong demand for domestic rice.

The fall/winter rice harvest is expected to conclude in September. In Nayarit, where the harvest is almost complete, production is 11 percent lower at 44,869 MT due to reduced yields. In southern Tamaulipas, farmers are expected to harvest 2,016 HA. This recovery is supported by water permits and state government assistance,

including access to precision seed drills. In Campeche, harvested area is projected to increase 60 percent to 2,700 HA, driven by favorable weather and the adoption of improved seed varieties such as INIFLAR RT and Escárcega FL24.

Trade

MY 2025/2026

Rice imports are forecast to increase by two percent to 895,000 MT, driven by demand for imported paddy rice for milling. Domestic production is expected to supply only about 20 percent of total consumption, with imports continuing to cover the bulk of Mexico's rice demand. Rice exports in MY 2025/2026 are forecast to decline 13 percent to 20,000 MT, reflecting higher domestic demand for broken rice.

MY 2024/2025

Imports

Rice imports are estimated to increase by three percent to 880,000 MT, based on updated trade data. From October 2024 through July 2025, imports reached 759,038 MT, with paddy rice accounting for 75 percent and milled rice for 25 percent. During this period, the overall U.S. market share declined from 80 to 57 percent, primarily in paddy rice. In contrast, Uruguay expanded its share from five to 20 percent. Brazil increased its share from 0.1 to 11 percent, while Thailand's market share fell from 13 to six percent (exclusively milled rice). Industry sources attribute South America's increased competitiveness to abundant exportable supplies.

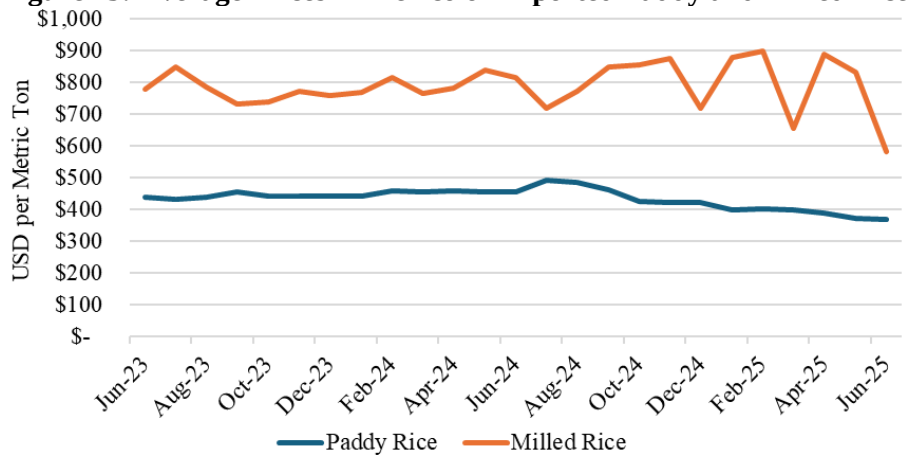
Paddy Rice

Paddy rice imports rose nine percent to 563,868 MT. The U.S. market share declined from 100 percent to 65 percent, with Uruguay accounting for 18 percent, Brazil 11 percent, and Paraguay six percent. In June 2025, the average import price for paddy rice fell 19 percent, landing at USD 367/MT. Uruguayan paddy rice was priced approximately eight percent below U.S. rice on average. Around 75 percent of paddy rice imports entered through the Port of Veracruz, followed by Nuevo Laredo and Nuevo Progreso in Tamaulipas.

Milled Rice

Milled rice imports fell 19 percent to 176,379 MT. The U.S. market share edged down from 34 to 33 percent, while Uruguay increased from 19 to 30 percent. Thailand's share declined from 47 to 27 percent, and Brazil rose from 0.4 to 10 percent. Other suppliers contributed one percent. Imports of Thai long-grain milled rice decreased in the first half of 2025, following the reinstated a 20-percent import tariff on rice from countries without a free trade agreement with Mexico. Over 90 percent of milled rice imports enter the Port of Veracruz. The Port's proximity to major consumption centers and milling facilities reinforces its role in rice import logistics.

Figure 15: Average Prices in Mexico of Imported Paddy and Milled Rice



Source: Mexican Rice Council

Exports

Rice exports in MY 2024/2025 are estimated 28 percent higher at 23,000 MT, driven by strong demand for broken rice from the U.S. brewery industry. Roughly 70 percent of rice exports refer to broken rice and 30 percent to long-grain milled rice.

Consumption

Rice consumption in MY 2025/2026 is forecast to increase one percent to 1.02 MMT, reflecting population growth. For MY 2024/2025, rice consumption is estimated to rise two percent to 1.0 MMT. The Mexican Rice Council estimates per capita consumption at 7.0 kilograms (15.4 pounds). Sources report that parboiled rice continues to post the fastest consumption growth, although it remains a niche segment within the market.

Stocks

Ending stocks in MY 2025/2026 are forecast to rise 23 percent to 171,000 MT. Rice stocks are typically held by cooperative warehouses, millers, and the government.

For MY 2024/2025, ending stocks are estimated 20 percent higher at 139,000 MT, as domestic millers take advantage of lower international rice prices to build inventories.

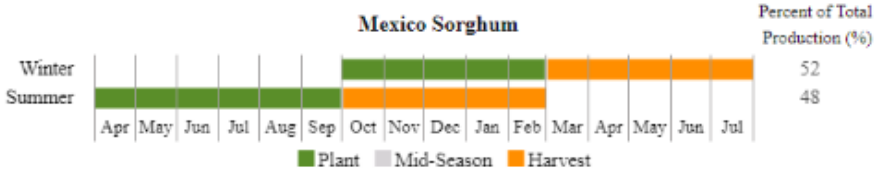
SORGHUM

Table 4: Mexico, Sorghum Production, Supply, and Distribution

Sorghum	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Mexico	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1295	1295	1200	1200	1240	1150
Beginning Stocks (1000 MT)	270	270	269	269	268	218
Production (1000 MT)	4540	4540	4200	4100	4300	4000
MY Imports (1000 MT)	60	60	500	550	600	750
Total Supply (1000 MT)	4870	4870	4969	4919	5168	4968
MY Exports (1000 MT)	1	1	1	1	1	1
Feed and Residual (1000 MT)	4500	4500	4600	4600	4800	4700
FSI Consumption (1000 MT)	100	100	100	100	100	100
Total Consumption (1000 MT)	4600	4600	4700	4700	4900	4800
Ending Stocks (1000 MT)	269	269	268	218	267	167
Total Distribution (1000 MT)	4870	4870	4969	4919	5168	4968
Yield (MT/HA)	3.5058	3.5058	3.5	3.4167	3.4677	3.4783

(1000 HA), (1000 MT), (MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Sorghum begins in October for all countries. TY 2025/2026 = October 2025 - September 2026

Figure 16: Mexico Sorghum Crop Calendar



Production

MY 2025/2026

Sorghum production in MY 2025/2026 (October – September) is forecast two percent lower at 4.0 MMT. Expectations of low prices are expected to limit expanded production. Harvested area is projected to decrease four percent to 1.15 million HA.

Spring/Summer Sorghum

Spring/summer sorghum planting is expected to conclude in September and is mostly complete in key producing states including Guanajuato, Michoacán, and Jalisco. This cycle typically accounts for 45 percent of total sorghum production. As of July 31, SIAP reported 302,279 HA planted. Rainfed sorghum is mostly sown from July through September, while irrigated crops were planted from May through June. In Guanajuato, planted area reached 127,606 HA, below last year's levels as some farmers shifted to corn due to lower sorghum profitability.

Fall/Winter Sorghum

In Tamaulipas, SIAP's planting intentions for the 2025/2026 fall/winter cycle are higher than the previous year. However, continued low crop prices and high farmer debt ratios are expected to constrain planted areas. On average, Tamaulipas is expected to account for 75 percent of fall/winter sorghum production.

MY 2024/2025

Sorghum production in MY 2024/2025 is estimated to decrease 10 percent to 4.1 MMT, the lowest level in over 30 years. Irregular precipitation, reduced profitability, and farmers' high debt-to-income ratios were the main factors behind the decline.

Spring/Summer Sorghum

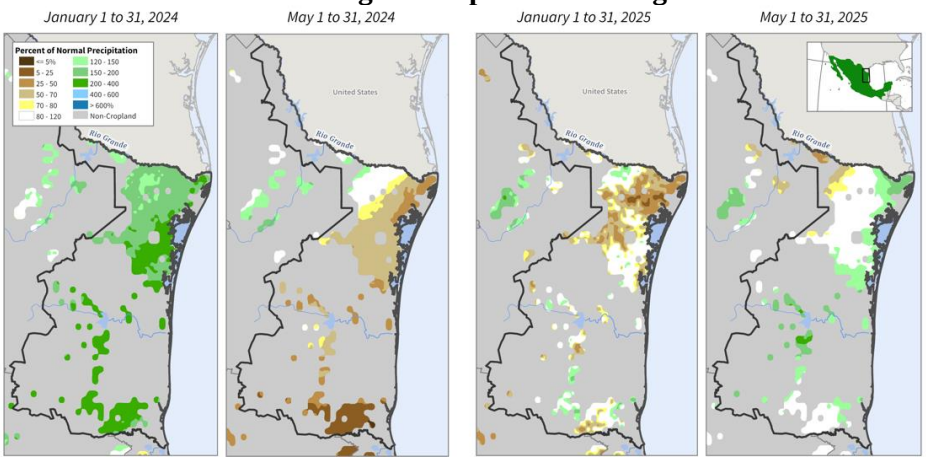
According to SIAP's final harvest data, spring/summer production decreased one percent to 2.02 MMT. Harvested area fell two percent to 409,715 hectares, while yields increased two percent to 4.95 MT/HA. In Guanajuato, production declined six percent to 868,452 MT due to reduced planting from higher input costs—including diesel, seed, and labor—and lower crop prices. During the peak harvest in November 2024, the farmgate sorghum price was three percent lower at 5,100 pesos (USD 247) per MT.

Fall/Winter Sorghum

According to preliminary SIAP data, harvested area for the fall/winter 2024/2025 cycle decreased eight percent to 795,000 HA. The harvest was completed in late August, with production estimated 13 percent lower at 2.12 MMT. Lower planted area and unfavorable weather conditions were the main factors behind the decline.

In Tamaulipas—the country's largest sorghum-producing state—production is estimated 14 percent lower at 1.66 MMT. Farmers reported that high temperatures and drought conditions during planting, combined with limited fertilizer use due to low liquidity, affected plant development and yields. Average yields declined by four percent to 2.48 MT/HA. Approximately 70 percent of the state's sorghum area is rainfed and 30 percent irrigated.

Figure 17: Tamaulipas - Percent of Normal Cumulative Precipitation (1-Month) at Planting and Reproductive Stages



Source: International Production Assessment Division (IPAD)

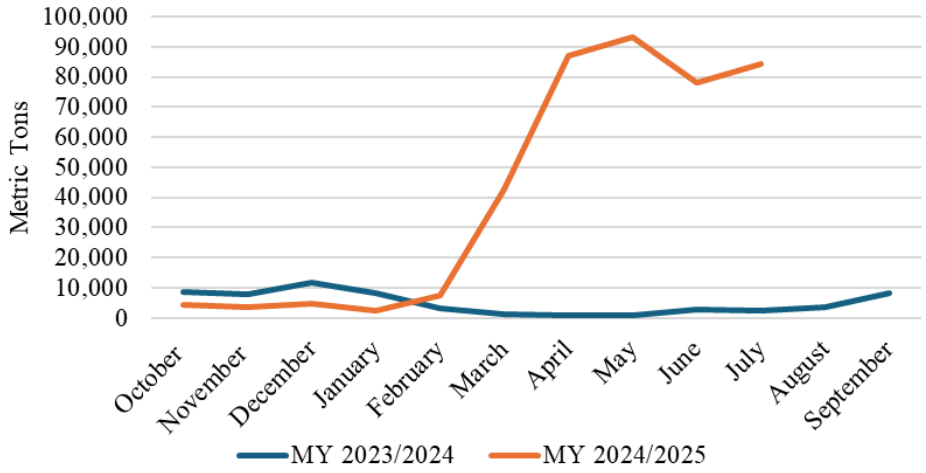
Sorghum farmgate prices in Tamaulipas fell 14 percent annually to 3,600 pesos (USD 195) per MT during harvest, reflecting lower international prices. Farmer associations report that at current yield levels, farmgate prices do not cover production costs. As a result, producers continue to request guaranteed prices and support programs from both state and federal governments.

Trade

Sorghum imports for MY 2025/2026 are forecast to increase by 36 percent to 750,000 MT, driven by lower domestic production and competitive prices for imported sorghum.

Sorghum imports in MY 2024/2025 are estimated to surge 817 percent to 550,000 MT based on updated trade data. Reduced domestic production and attractive import prices were the main drivers. From October 2024 through July 2025, imports increased 750 percent to 408,467 MT. Virtually all sorghum imports originate from the United States. Shipments from Texas are primarily transported by truck, while sorghum from Midwestern states is shipped via rail and vessel.

Figure 18: Mexico's Sorghum Imports by Marketing Year



Source: Trade Data Monitor

Consumption

Total sorghum consumption in MY 2025/2026 is forecast to increase two percent to 4.8 MMT, primarily due to increased demand in the local feed industry. Industry sources report that sorghum serves as an alternative energy ingredient in Mexico's feed sector, particularly for vertically integrated poultry and swine operations. However, yellow corn remains the preferred feed grain due to its price competitiveness, higher energy content, and year-round availability.

Consumption in MY 2024/2025 is estimated two percent higher at 4.7 MMT. Lower domestic stocks resulting from decreased production were offset by higher imports. Much of the domestic sorghum is consumed near producing regions, while imported sorghum is largely distributed to northern states and the Bajío region.

Stocks

Ending stocks in MY 2025/2026 are forecast to decrease 23 percent to 167,000 MT, reflecting lower production and higher utilization to meet domestic demand.

Ending stocks in MY 2024/2025 are estimated 19 percent lower at 218,000 MT, primarily due to reduced domestic production and stable demand. Stock levels are estimated to cover approximately 17 days of domestic consumption.

POLICY (all grains)

New Congressional Period in 2025
The Congress began a new legislative period on September 1, 2025, which will run through December 15, 2025. Morena and its allied parties have a qualified majority (two thirds of the Chamber members) in the Lower Chamber and a simple majority (more than 50 percent) in the Senate. President Claudia Sheinbaum announced that her administration will prioritize the approval of the 2026 Economic Package. Members of the agricultural sector are closely monitoring the session for any new government policies that could affect their operations.

2026 Budget Proposal Prioritizes Social Assistance
On September 8, Mexico's Secretariat of Finance (Hacienda) submitted the 2026 economic package to Congress. The proposal calls for a 5.9 percent real increase in federal spending, prioritizing social programs, debt servicing, and pensions. SADER is allocated USD 4.0 billion, a one percent nominal increase but a three percent decline in real terms. Over 70 percent of SADER's budget remains directed to social assistance for small-scale producers including fertilizer distribution, cash transfers, price supports, and food assistance to low-income families. Congress must approve the revenue package by October 31 and the expenditure package by November 15.

Presidential Anti-Inflation Decree
On December 31, 2024, the GOM published a decree to extend the exemption of tariffs and easing of administrative procedures for the importation of basic food products. The decree will continue to provide non-free trade agreement partners tariff free access to Mexico's market that the United States receives under the United States-Mexico-Canada Agreement (USMCA). The benefits apply to companies who are part of the 'Register of Importers of Products of the Basic Basket.' The extension is valid through December 31, 2025, but companies registered under the program may use the benefits of the decree until March 31, 2026 (see: GAIN MX2025-0011). The grains and related products with duty-free access included in the decree are listed below.

Note: In the table below, "Ex." represents the term "Exempt."

Code	Product	Tariff	Notes
10.01	**Wheat and meslin.**		
1001.11.01	For sowing.	Ex.	
1001.19.99	Others.	Ex.	
1001.91.99	Others.	Ex.	
1001.99.99	Others.	Ex.	
11.01	**Wheat or meslin flour**		
1101.00.01	Wheat or meslin flour	Ex.	
10.05	**Corn.**		
1005.90.04	White corn (flour type).	Ex.	For human consumption only (not genetically modified).
1005.90.99	Others.		Only yellow corn for animal consumption.
10.06	**Rice.**		
1006.10.99	Others.	Ex.	
10.07	**Grain sorghum (graniferous).**		

1007.90.01		Ex.	When the operation is carried out within the period between December 16 and May 15.
1007.90.02		Ex.	When the operation is carried out within the period between May 16 and December 15.
11.01	**Wheat or meslin flour (tranquillón)**	Ex.	
11.02	**Cereal flour, except wheat or meslin.**		
1102.20.01	Cornmeal.	Ex.	
19.02	**Pasta, whether cooked or stuffed (with meat or other substances) or otherwise prepared, such as spaghetti, noodles, macaroni, noodles, lasagna, gnocchi, ravioli, cannelloni;**		
1902.11.01	They contain eggs.	Ex.	
1902.19.99	The others.	Ex.	
1902.30.91	Other pasta	Ex.	
19.05	**Bakery, pastry, or biscuit products, whether containing added cocoa; wafers, empty seals of the type used for medicines, wafers for sealing, dry pastes of flour, starch, or starch, in sheets, and similar products.**		
1905.40.01	Toasted bread and similar toasted products.	Ex.	Box bread only.
1905.90.99	Others.	Ex.	Box bread only.

For More Information

Visit the FAS home page at www.fas.usda.gov for a complete selection of FAS worldwide agricultural reporting.

Report Number	Title	Dated
MX2025-0030	Grain and Feed Update	06/23/2025
MX2025-0013	Grain and Feed Annual	03/21/2025
MX2025-0003	Grain and Feed Update	01/23/2025
MX2024-0044	Grain and Feed Update	09/24/2024
MX2024-0032	Grain and Feed Update	06/19/2024

Additionally, the FAS International Production Assessment Division Crop Explorer provides information on Mexico's grain production:
Corn Explorer
Wheat Explorer
Rice Explorer
Sorghum Explorer

Attachments:

No Attachments