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Report Highlights:

Mexico's corn production is forecast to decline in marketing year 2026/2027 as higher input costs and low domestic prices weigh on planting decisions. Corn, wheat, and rice imports are expected to increase as domestic output remains insufficient to meet growing demand, whereas sorghum imports are expected to fall on higher domestic production. The United States is expected to remain the main source of Mexican grain and feed imports.

EXECUTIVE SUMMARY

Grain demand in marketing year (MY) 2026/2027 is expected to remain strong, supported by population growth and continued expansion in the poultry and swine sectors. Mexico is forecast to remain a major grain importer as domestic production remains insufficient to meet growing demand. The Bank of Mexico (Banxico) projects economic growth of 1.1 percent in 2026, which is expected to sustain steady demand for grains for both food and feed use.

Mexico's corn production is forecast to decline two percent to 24.3 million metric tons (MMT), pressured by higher input costs and relatively low domestic prices. Corn imports are projected to rise two percent to 27.0 MMT, driven by lower domestic production and stronger demand from the livestock and feed sectors.

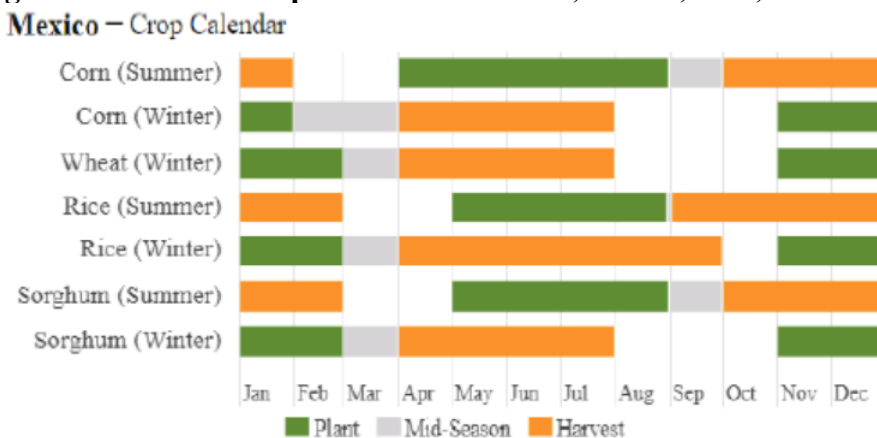
Wheat production is forecast to increase 14 percent to 2.0 MMT, supported by a partial recovery of reservoir levels in Sonora and Sinaloa. Imports are projected two percent higher at 5.9 MMT, while exports are forecast to rise 25 percent to 150,000 metric tons (MT) based on higher expected durum wheat production.

Rice production is forecast to increase four percent to 192,000 MT, driven by strong demand for domestic rice. Imports are expected to rise four percent to 830,000 MT on higher consumption tied to population growth.

Sorghum production is forecast to rebound 15 percent to 4.2 MMT, supported by the crop's lower production costs compared to other grains. Imports are forecast to fall 40 percent to 300,000 MT on higher expected output.

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

Figure 1. Mexico's Crop Calendar for Corn, Wheat, Rice, and Sorghum



CORN

Table 1. Mexico, Corn Production, Supply and Distribution

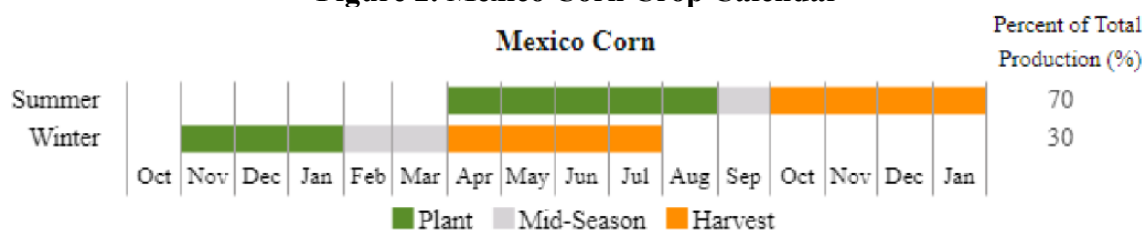
Corn Market Year Begins Mexico	2024/2025		2025/2026		2026/2027	
	Oct 2024		Oct 2025		Oct 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	6500	6500	6700	6700	6400	6400
Beginning Stocks (1000 MT)	5626	5626	5531	5531	5901	5301
Production (1000 MT)	23100	23100	25000	24700	24600	24300
MY Imports (1000 MT)	25930	25930	27000	26500	27700	27000
Total Supply (1000 MT)	54656	54656	57531	56731	58201	56601
MY Exports (1000 MT)	25	25	30	30	20	20
Feed and Residual (1000 MT)	27500	27500	29800	29500	31200	30300
FSI Consumption (1000 MT)	21600	21600	21800	21900	22200	22200
Total Consumption (1000 MT)	49100	49100	51600	51400	53400	52500
Ending Stocks (1000 MT)	5531	5531	5901	5301	4781	4081
Total Distribution (1000 MT)	54656	54656	57531	56731	58201	56601
Yield (MT/HA)	3.5538	3.5538	3.7313	3.6866	3.8438	3.7969

(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 2026/2027 = October 2026 - September 2027

Figure 2. Mexico Corn Crop Calendar



Production

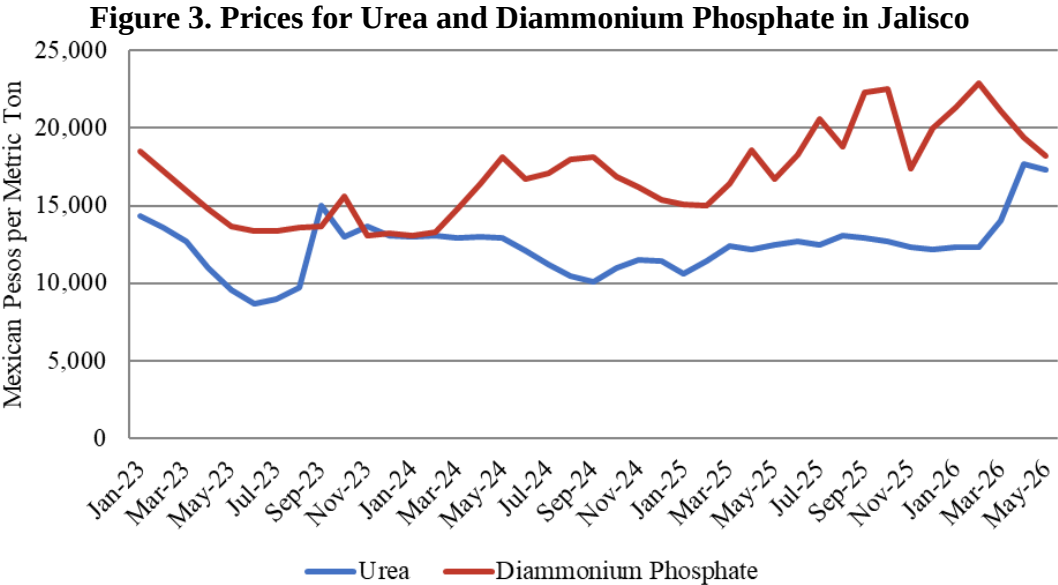
MY 2026/2027

Corn production in MY 2026/2027 (October–September) is forecast to decrease by two percent to 24.3 MMT due to higher input costs and low domestic corn prices. Harvested area is expected to decrease four percent to 6.4 million hectares (HA).

Spring/Summer Corn

The Agricultural and Fisheries Information Service (SIAP) projects a stable planted area for the spring/summer cycle at 5.9 million hectares (HA). However, higher input prices and low domestic corn prices are expected to pull planted area below this projection. In Jalisco, Michoacán, and Guanajuato (35 percent of spring/summer production) most producers plan to reduce planted area. In the Bajío region of Michoacán and the Valle de Santiago in Guanajuato, some farmers plan to switch from corn to sorghum due to its lower production costs. In Chihuahua, planted area is expected to remain stable at 235,000 HA, roughly 60 percent irrigated and 40 percent rainfed.

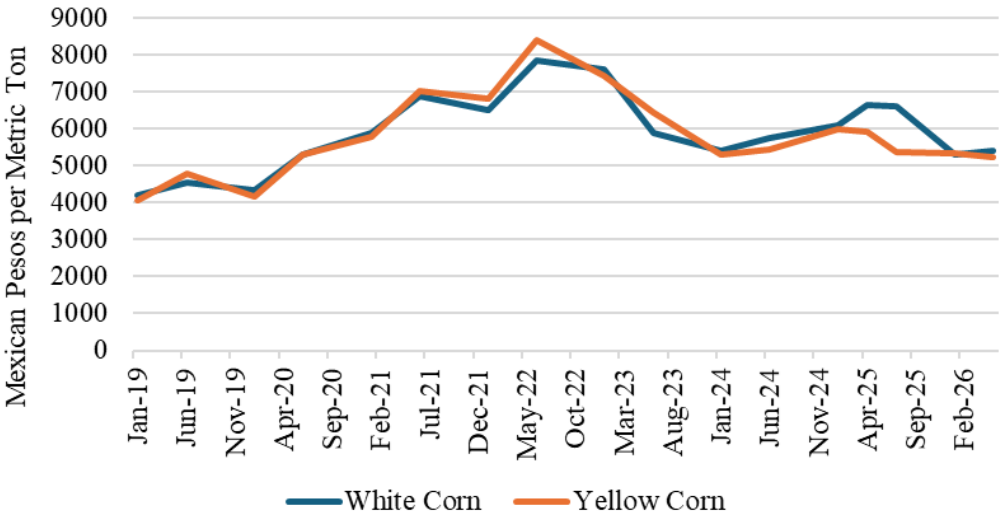
Higher fertilizer and fuel costs are largely behind increases in production costs. In May 2026, the National System of Market Information and Integration (SNIIM) reported the price of urea at 42 percent above the previous year at 17,300 pesos (USD 1,005) per MT, while diammonium phosphate was nine percent higher at 18,230 pesos (USD 1,060) per MT. Diesel rose seven percent to 27 pesos (USD 1.65) per liter over the same period. The exchange rate for this report is set at 17.2 pesos per USD.



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

Lower prices are expected to discourage planting and reduce white corn area in MY 2026/2027. In May 2026, SNIIM reported the price of white corn in the Bajío region (Jalisco, Guanajuato, and Michoacán) at 5,400 pesos (USD 315) per MT, including transportation costs to the buyer. This price was 20 percent below the prior year and only five percent above yellow corn.

Figure 4. Average White and Yellow Corn Terminal Prices in the Bajío Region (January 2019 – February 2026)



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

Most spring/summer corn is sown between June and August. As of early June, planting progress reached 45 percent in Chihuahua, 30 percent in Guanajuato, 20 percent in Michoacán, 10 percent in Estado de México and five percent in Jalisco and Chiapas, largely in irrigated areas.

Fall/Winter Corn

Planted area in the 2026/2027 fall/winter cycle hinges largely on expected crop prices and irrigation permits. The State Plant Health Committee of Sinaloa (CESAVESIN) is likely to determine permit approvals for irrigated corn in September 2026, based on reservoir levels at that time. Although dam levels improved to 15.1 percent of capacity in early June from 6.2 percent a year earlier, they remained significantly below the 10-year average of 24 percent for the same period.

Government Support Programs Unlikely to Offset Projected Corn Production Decline

The Government of Mexico (GOM) extended the Production for Well-being, Fertilizer for Well-being, and Grain Collection for Well-being programs for fiscal year 2026. These support programs have limited impacts on expanding corn-planted area as they are restricted to subsistence and small-scale farming and include land-area restrictions that exclude the larger commercial operations responsible for the bulk of Mexico's marketable corn.

Table 2. 2026 Federal Corn Support Programs

Program	Description
Production for Well-being Program	Provides an annual cash incentive ranging from 7,300 pesos (USD 425) to 24,000 pesos (USD 1,395) per beneficiary, along with technical assistance on low-input farming practices. The program targets small-scale farmers producing rainfed corn on up to 20 HA and irrigated corn on up to five HA.
Grain Collection for Well-being Program	Purchases corn directly from smallholder farmers at a guaranteed price of 7,000 pesos (USD 407) for producers planting up to five HA or producing up to 35 MT. The program also provides a 200-pesos (USD 11.5) per MT transportation subsidy and supports production of up to 15 MT of native corn varieties.
Fair Trade Program	Provides white corn producers with cash support for up to 50 HA or 250 metric tons of production, to offset crop insurance costs.
Fertilizer for Well-being Program	Provides free fertilizer to small-scale producers, with support capped at 600 kilograms and 2.0 HA per farmer.
Operational Mechanism to Support Fall/Winter White Corn Farmers in Sinaloa	Announced on April 15, 2026, the Sinaloa state government will provide 400 pesos (USD 23) per MT, the federal government 800 pesos (USD 47) per MT, and the Trust Funds Established in Relation to Agriculture (FIRA) an additional 500 pesos (USD 28) per MT in producer support. Producers are capped at 10 MT/HA and must register with the Secretariat of Agriculture and Rural Development (SADER).

On May 20, 2026, the GOM announced the [White Corn Production and Trade Coordination System](#) to deliver forward contracting, fair priced inputs, and a price protection mechanism. The agreement promises support for 61,000 producers across Guanajuato, Jalisco, Michoacán, Querétaro, Sinaloa,

Tlaxcala, and Campeche. The GOM has not yet published the terms of reference or budget for the program.

MY 2025/2026

Production for MY 2025/2026 is estimated to rebound by seven percent to 24.7 MMT, driven by higher water availability for irrigated fall/winter corn. However, projected output is four percent lower than the 10-year average. This estimate is based on updated official spring/summer harvest data and the harvest progress for the fall/winter cycle.

Spring/Summer Corn

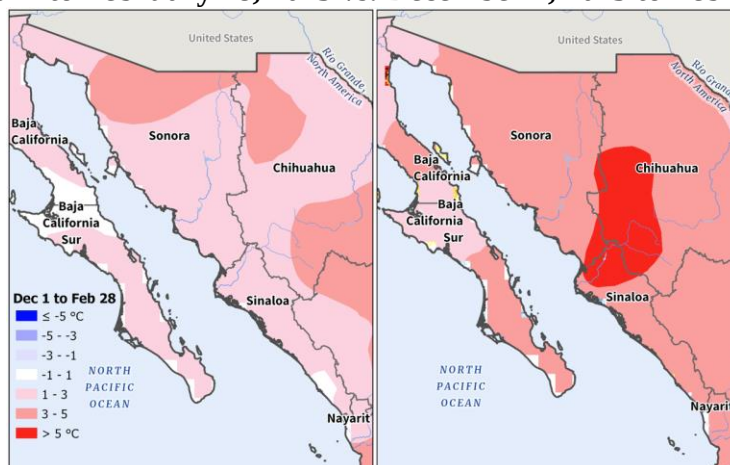
According to preliminary SIAP data, the spring/summer cycle increased one percent annually to 19.4 MMT. Harvested area increased one percent to 5.8 million HA with average yields stable at 3.37 MT/HA. Farmers in some regions reported a higher incidence of tar spot and corn leafhoppers. The cycle yielded roughly 17.6 MMT of white corn and 1.8 MMT of yellow corn. White corn production rose eight percent, while yellow corn production declined by 18 percent. Sources report good grain quality in over 80 percent of the commercial corn crop.

Fall/Winter Corn

The fall/winter corn harvest began in May and is expected to conclude by late August. Planted area increased four percent to 903,470 HA on higher reservoir levels in Sinaloa. While authorized area in Sinaloa reached 459,000 HA, actual planted area was significantly lower at 310,124 HA as low crop prices and limited access to financing kept producers from planting the fully approved area. Harvest in the state is expected to conclude by late June.

Preliminary reports indicate average yields will decline roughly ten percent to 9.5 MT/HA. Higher-than-average daytime and nighttime temperatures accelerated crop development and shortened the growing cycle which curtailed grain fill and limited yield potential.

**Figure 5. Mexico's Northwest: Maximum Temperature Departure from Normal
December 1, 2024 to February 28, 2025 vs. December 1, 2025 to February 28, 2026**



Source: USDA FAS International Production Assessment Division (IPAD)

Warmer conditions, particularly higher overnight temperatures, also increased fall armyworm (*Spodoptera frugiperda*) pressure. Sources reported grain quality issues, with a significant share of kernels stained and broken.

In Veracruz, harvested area declined ten percent to 185,000 HA. The harvest concluded in late May, with production estimated at 455,000 MT and average yields of 2.46 MT/HA. Sources reported good grain quality and no significant pest or disease impacts. The state government supported smallholder corn producers through seed and biofertilizer distributions and assistance with tractors and power tillers.

In Tamaulipas, planted area declined 17 percent to 58,948 HA, 34 percent below the 10-year average, due to limited water availability and expectations of lower prices. In irrigation district 025 Bajo Río Bravo, most farmers shifted from irrigated corn to rainfed sorghum as reservoir levels at La Amistad and Falcón remained critically low. High debt levels and low crop prices also reduced farmers' use of rented land and synthetic fertilizers. Local sources reported favorable crop conditions due to above-average precipitation from April through June. Harvest is expected to begin in late June and conclude in August.

In Chiapas, fall/winter corn harvested area remained stable at approximately 110,000 HA, with estimated production of 190,000 MT. Rainfed corn accounted for roughly 90 percent of area and relied on residual soil moisture, with yields averaging 1.4 MT/HA. Irrigated corn accounted for the remaining ten percent and yielded approximately 4.7 MT/HA.

Trade

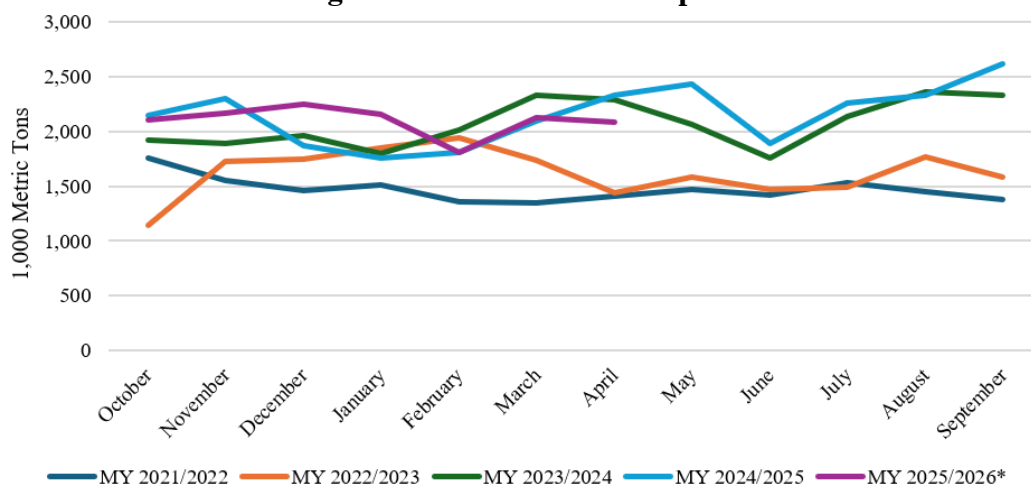
MY 2026/2027

Corn imports are forecast to increase two percent to 27.0 MMT in MY 2026/2027, driven by lower expected production and increased demand by the livestock sector, primarily steady growth in poultry feed demand. The United States is expected to remain the main source of origin based on price competitiveness, favorable logistics, and quality supplies. Corn exports for MY 2026/2027 are forecast to decrease 33 percent to 20,000 MT, as lower production and a strong peso constrain Mexico's ability to export corn.

MY 2025/2026

Corn imports in MY 2025/2026 are estimated to increase two percent to 26.5 MMT. From October 2025 through April 2026, imports rose one percent year-on-year to 14.7 MMT nearly all from the United States. U.S. yellow corn (Grade 2) continues to hold a price advantage over competing origins and offers consistent quality suited to livestock feed, compound feed manufacturing, and industrial applications such as starch, oil, and syrup production. Roughly 65 percent of corn imports reach Mexico by rail across the northern land border and 35 percent arrived by vessel through Gulf ports. Over the same period, white corn imports rose 49 percent to 501,131 MT, virtually all of U.S. origin.

Figure 6. Mexico's Corn Imports



Source: Trade Data Monitor
 *October 2025 through April 2026

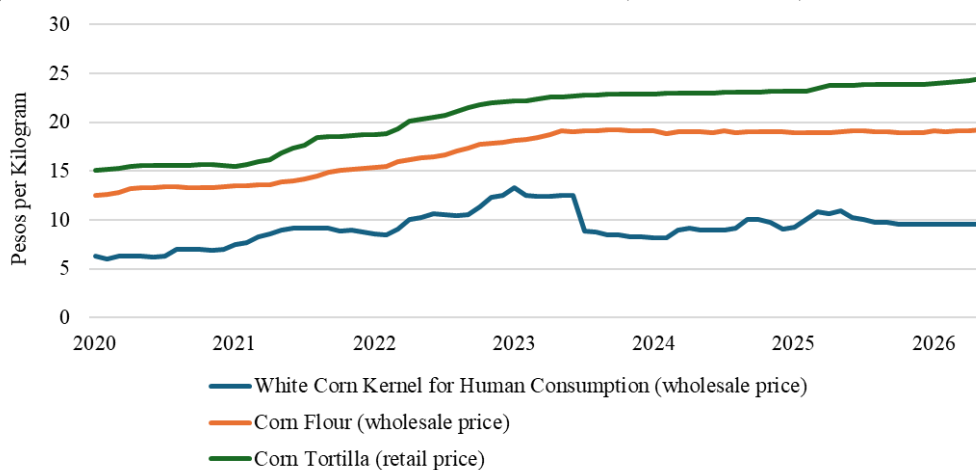
Consumption

Total consumption in MY 2026/2027 is forecast to increase two percent to 52.5 MMT, driven by increased demand for animal feed in the egg, poultry, and swine sectors.

White corn consumption for tortillas and dough is expected to increase one percent driven by steady population growth, more corn-based snacks, and corn tortillas as a dietary staple. Corn tortilla prices increased by three percent from May 2025 through May 2026, lower than the 4.4 percent annual headline inflation, indicating that tortillas became less expensive in real terms, supported by stable corn and flour prices.

Corn consumption in MY 2025/2026 is estimated to increase five percent to 51.4 MMT, driven by continued growth in the livestock industry.

Figure 7. Prices of Wholesale White Corn Kernel, Corn Flour, and Corn Tortilla



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

Increased yellow corn consumption is concentrated in livestock operations across the country, which rely on rail and maritime shipments sourced primarily from the United States. The Bajío region (Jalisco, Aguascalientes, Guanajuato, Michoacán, and Querétaro) accounts for roughly 48 percent of yellow corn use, followed by La Laguna (Durango and Coahuila) at 12 percent, Puebla and Veracruz at 11 percent, and Sinaloa and Sonora at 10 percent. The remaining states account for 19 percent.

Figure 8. Mexico's Key Livestock Corn Consumption Regions



Source: Post with data from industry

Stocks

Corn ending stocks in MY 2026/2027 are forecast to decline 23 percent to 4.1 MMT, on lower projected production and continued drawdown to meet demand from the livestock feed sector.

In MY 2025/2026, corn ending stocks are estimated to decline four percent to 5.3 MMT, as carry-in stocks were drawn down to meet consumption requirements. Industry sources indicate that most yellow corn stocks are held by the feed and livestock sectors and traders, while most white corn stocks are held by the corn flour industry, grain collection centers, and traders.

WHEAT

Table 3. Mexico, Wheat Production, Supply and Distribution

Wheat Market Year Begins Mexico	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	468	468	320	310	375	400
Beginning Stocks (1000 MT)	550	550	620	620	450	450
Production (1000 MT)	2648	2648	1750	1750	2000	2000
MY Imports (1000 MT)	5607	5607	5800	5800	5900	5900
Total Supply (1000 MT)	8805	8805	8170	8170	8350	8350
MY Exports (1000 MT)	135	135	120	120	200	150
Feed and Residual (1000 MT)	650	650	200	200	200	200
FSI Consumption (1000 MT)	7400	7400	7400	7400	7500	7500
Total Consumption (1000 MT)	8050	8050	7600	7600	7700	7700
Ending Stocks (1000 MT)	620	620	450	450	450	500
Total Distribution (1000 MT)	8805	8805	8,170	8170	8350	8350
Yield (MT/HA)	5.6581	5.6581	5.47	5.6452	5.33	5

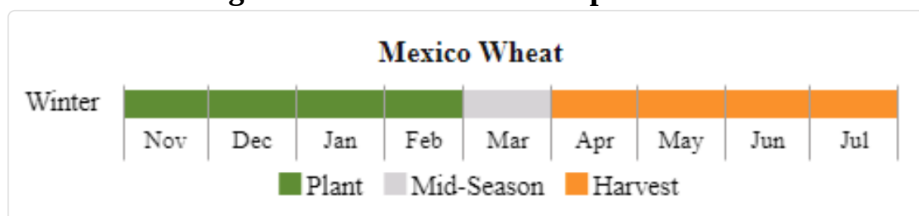
(1000 HA), (1000 MT), (MT/HA)

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 2026/2027 = July 2026 - June 2027

Note: Post revised Feed and Residual Use and Food, Seed, and Industrial (FSI) Consumption estimates for marketing years 2015/2016 - 2025/2026 based on updated information from local industry contacts.

Figure 9. Mexico Wheat Crop Calendar



Production

MY 2026/27

Wheat production in MY 2026/2027 (July–June) is forecast to increase 14 percent to 2.0 MMT, driven by higher reservoir levels. Harvested area is expected to increase 29 percent to 400,000 HA, driven by a partial recovery in reservoir levels in Sonora. The projected harvested area is 31 percent lower than the 10-year average, though.

Fall/Winter Wheat

The fall/winter wheat harvest began in March and is expected to conclude by August. According to SIAP, producers increased planted area by 32 percent to 357,708 HA, supported by improved reservoir levels in Sonora. As of early June, producers had nearly completed harvest in Sonora, the largest producing state, and increased harvested area by 40 percent to 150,080 HA due to greater water availability. Durum wheat accounted for roughly 60 percent of harvested area, primarily Cirno C-2008 and Noroeste C-2021 varieties, while bread wheat accounted for the remaining 40 percent, mainly

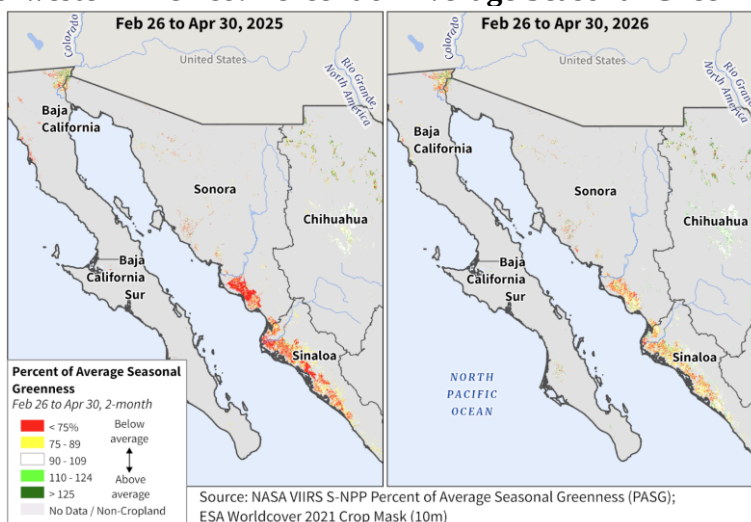
Borlaug-100. Unusually warm winter temperatures and a 90 percent decline in cold hours accelerated crop development, reduced grain filling, and lowered yields. In the Yaqui Valley, farmers report average yields of 4.8 MT/HA, down from 7.0 MT/HA a year earlier. In the Mayo Valley, early reports indicate average yields of 3.5 MT/HA, compared to 5.5 MT/HA in the previous year.

In Sinaloa, producers completed harvest in late May and increased harvested area by 65 percent to 55,800 HA, including 54,200 HA of bread wheat and 1,600 HA of durum wheat. In the Carrizo Valley, early reports indicate average yields of 4.2 MT/HA, down from 5.9 MT/HA the previous year. High temperatures and limited cold-hour accumulation disrupted vernalization and grain filling, reducing yields.

In Baja California, producers completed harvest in late May and reduced harvested area by 13 percent to 26,640 HA, including 15,740 HA of durum wheat and 10,900 HA of bread wheat. Early reports indicate average yields of 5.5 MT/HA for both durum and bread wheat, down from 6.6 MT/HA in the previous cycle. High temperatures reduced yields.

In the Bajío region (Guanajuato, Michoacán, and Jalisco), producers completed harvest in early June and reduced harvested area by 35 percent to 67,479 HA, including 59,139 HA of bread wheat and 8,340 HA of durum wheat. Higher input costs and lower expected crop prices drove the decline. Early reports indicate average yields of 6.0 MT/HA for both bread and durum wheat, unchanged from the previous cycle. In Chihuahua, producers are expected to complete harvest in July and increase harvested area by 35 percent to 5,621 HA, almost entirely bread wheat, supported by improved reservoir levels.

Figure 10. Northwestern Mexico: Percent of Average Seasonal Greenness (PASG)



Source: USDA FAS International Production Assessment Division (IPAD)

Government support programs for wheat production in MY 2026/2027 are likely to have a limited impact on wheat production due to eligibility restrictions and reported delays in program publication and payments. For 2026, the [Fair Trade](#) program set a guaranteed price of 7,600 pesos per MT (USD 435) for producers with up to 8 HA or 50 MT of bread wheat, and 7,050 pesos per MT (USD 402) for producers with up to 140 MT of bread wheat. As of June 2026, the average price of bread wheat purchased from farms in Sonora and Sinaloa was 4,500 pesos per metric ton (USD 260). Thus,

guaranteed prices for small and medium producers are 69 and 56 percent higher than farmgate prices, respectively.

To provide some protection against price volatility, durum wheat producers in Sonora and Baja California secured an industry purchase price of USD 300 per MT. The federal government pledged an additional 175 pesos (USD 10) per MT, and the Sonora state government pledged a further 350 pesos (USD 20) per MT. Even so, producers report that against higher input costs and expected yields of 5.0 MT/HA, the combined support barely covers their breakeven point.

Figure 11. Global Wheat Prices



Source: International Monetary Fund (IMF)

Note: Prices are period averages in nominal U.S. dollars.

Spring/Summer Wheat

Planting intentions for the spring/summer cycle are stable at 41,000 HA, nearly all of which is bread wheat. On average, the spring/summer cycle accounts for approximately three percent of total domestic wheat production. Spring/summer wheat is primarily produced in Tlaxcala, Guanajuato, and smaller volumes in central states.

MY 2025/2026

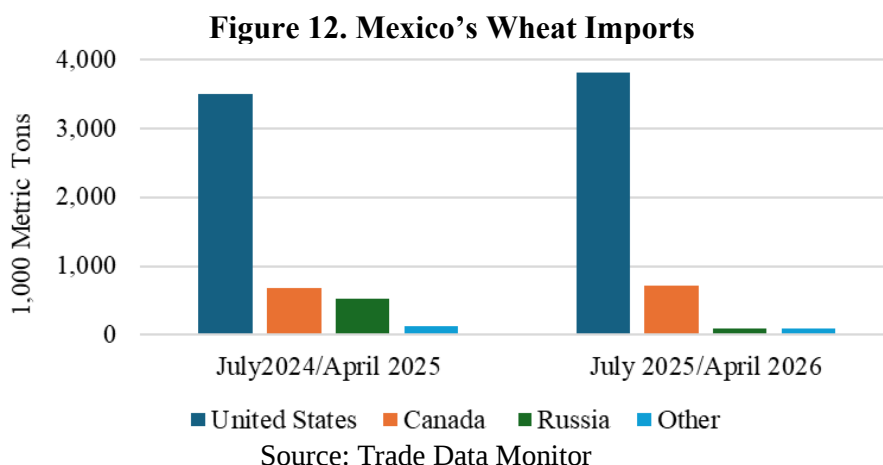
Production in MY 2025/2026 is estimated 34 percent lower at 1.75 MMT, driven by low reservoir levels for irrigated wheat production. This estimate includes fall/winter wheat, fully harvested in August 2025, and spring/summer wheat, fully harvested in January 2026.

According to SIAP, fall/winter production fell 35 percent year-over-year to 1.66 MMT as prolonged drought and record-low reservoir levels in Sonora and Sinaloa reduced both planted area and yields. Spring/summer production is estimated 16 percent lower at 85,416 MT, pulled down by farmers' expectations of lower prices. This cycle is primarily rainfed, with an estimated average yield of 2.1 MT/HA, and accounts for approximately three percent of total wheat production.

Trade

In MY 2026/2027, wheat imports are forecast to increase two percent to 5.9 MMT, driven by forecast lower-than-average domestic production. Wheat exports are forecast 25 percent higher at 150,000 MT, driven by higher expected durum wheat production.

Post estimates MY 2025/2026 wheat imports at 5.8 MMT, up three percent from the previous year as low domestic production increases import demand. From July 2025 through April 2026, Mexico imported 4.7 MMT of wheat, with the United States supplying 81 percent, followed by Canada at 15 percent, Russia at two percent, and Argentina and other origins at two percent. Compared to the previous year, the U.S. market share increased by eight percentage points, Canada's share rose by one point, and Russia's share declined by ten points. The Presidential Anti-Inflation Decree (see Policy section) continues to exempt wheat and wheat flour imports from import duties if derived from non-free trade agreement countries.



Consumption

Wheat consumption in MY 2026/2027 is forecast to increase one percent to 7.7 MMT, supported by rising demand for bread wheat in line with population growth. Most feed millers nationwide prefer corn due to price and digestibility, limiting feed-grade wheat use.

Wheat consumption in MY 2025/2026 is estimated to decrease six percent to 7.6 MMT, based on lower wheat supplies and feed millers' preference for corn over wheat. In 2026, Mexico's wheat milling capacity is 11.2 MMT across 95 mills. The Mexico City metropolitan area and Bajío region mill more than half of all wheat.

Stocks

Ending stocks in MY 2026/2027 are projected to grow 11 percent to 500,000 MT, driven by higher domestic production and imports. Commercial traders and millers hold most wheat stocks in storage facilities and warehouses. For MY 2025/2026, ending stocks are estimated 27 percent lower to 450,000 MT, as significantly low production is expected to draw down inventories.

RICE

Table 4. Mexico, Rice Production, Supply and Distribution

Rice, Milled Market Year Begins Mexico	2024/2025		2025/2026		2026/2027	
	Oct 2024		Oct 2025		Oct 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	37	37	40	39	42	41
Beginning Stocks (1000 MT)	116	116	146	146	120	100
Milled Production (1000 MT)	164	164	189	184	196	192
Rough Production (1000 MT)	239	239	275	268	285	279
Milling Rate (.9999) (1000 MT)	6870	6870	6870	6870	6870	6870
MY Imports (1000 MT)	893	893	800	800	825	830
Total Supply (1000 MT)	1173	1173	1135	1130	1141	1122
MY Exports (1000 MT)	27	27	5	30	10	30
Consumption and Residual (1000 MT)	1000	1000	1010	1000	1020	1010
Ending Stocks (1000 MT)	146	146	120	100	111	82
Total Distribution (1000 MT)	1173	1173	1135	1130	1141	1122
Yield (Rough) (MT/HA)	6.4595	6.4595	6.875	6.8718	6.7857	6.8049

(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 2026/2027 = January 2027 - December 2027

Production

MY 2026/2027

Rice production in MY 2026/2027 (October–September) is forecast to increase by four percent to 279,000 MT, equivalent to 192,000 MT of milled rice. Harvested area is expected to increase by five percent to 41,000 HA. Farmers in Campeche, the largest producing state, are expected to expand planted area due to increased access to financing mechanisms and steady growth in demand for domestic rice. Despite this projected production growth, Mexico is expected to remain a net rice importer as domestic production covers roughly 15 percent of consumption.

Spring/Summer Rice

Planting intentions for the spring/summer cycle are up ten percent to 30,000 HA, driven by increased financial mechanisms and strong domestic demand. Domestic rice production mainly consists of medium-grain varieties, with some cultivation of long-grain types. As of early June, planting progress reached 15 percent in Michoacán and Jalisco, and 10 percent in Campeche and Tabasco. Approximately 75 percent of the total planted area is sown between June and August and nearly 60 percent is irrigated.

Producers in Campeche, Jalisco, Tabasco, and Michoacán, which together account for approximately 50 percent of average spring/summer rice production, are expected to increase planted area in response to steady demand growth. In Champotón and Hopelchén, Campeche, producers plan to expand planted area by 1,600 HA. Nearby mills purchase most local production, providing strong market support. Meanwhile, producers in Nayarit and Colima expect to maintain planted area, while producers in Veracruz intend to reduce plantings.

The 2026 [Fair Trade](#) program sets a purchase price of 9,080 pesos per MT (USD 528) for producers with up to 8 HA, who can sell up to 80 MT. Larger producers can sell up to 250 MT at 8,260 pesos per MT (USD 480), with the government subsidizing the difference. The guaranteed price is 65 percent above the average farmgate price of medium-grain rice in Nayarit. Farmers sell their rice directly to mills, and the government covers the difference between the mill price and the guaranteed price.

Fall/Winter Rice

Planting intentions for the fall/winter cycle are stable. In Campeche and Nayarit, farmers typically plant irrigated rice in the fall and switch to rainfed corn or soybean in the spring after harvesting rice. The Campeche and Nayarit state governments are likely to continue providing loaned equipment, discounted certified seeds, and technical assistance to rice producers. Production in this cycle is almost entirely irrigated and depends heavily on adequate reservoir and aquifer levels.

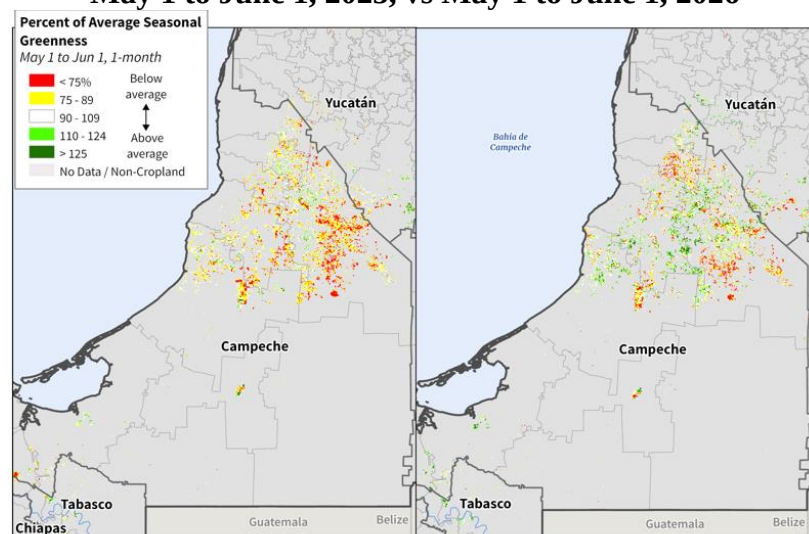
MY 2025/2026

Post estimates MY 2025/2026 rice production at 268,000 MT, equivalent to 184,000 MT of milled rice, up 12 percent from the previous year as strong demand for domestic rice encourages production.

Spring/Summer Rice

SIAP reports an 18 percent increase in harvested area to 27,212 HA, with production estimated at 164,131 MT and an average yield of 6.0 MT/HA. Estimated production is eight percent higher than the previous year. The spring/summer cycle typically accounts for approximately 70 percent of total annual rice production with roughly 60 percent irrigated and 40 percent rainfed production.

**Figure 13. Campeche: Percent of Average Seasonal Greenness (PASG)
May 1 to June 1, 2025, vs May 1 to June 1, 2026**



Source: NASA VIIRS S-NPP Percent of Average Seasonal Greenness (PASG); IIASA-IFPRI 2024 Crop Mask (500m)

Source: International Production Assessment Division (IPAD)

Fall/Winter Rice

The fall/winter rice harvest began in April and is expected to conclude in August. According to SIAP, producers reduced planted area by 10 percent to 11,606 HA, with the largest declines occurring in Michoacán and Campeche.

In Nayarit, harvest began in early June, and producers maintained planted area at an estimated 6,080 HA. Early yield reports indicate average yields of 8.0 MT/HA for medium-grain (Milagro Filipino) rice and 9.5 MT/HA for long-grain rice. The state government supported producers by providing free seed and crop insurance. In southern Tamaulipas, producers increased planted area by eight percent to 2,189 HA, supported by water permits and state government assistance, including access to precision seed drills. Producers expect to begin harvesting in July and complete harvest by August.

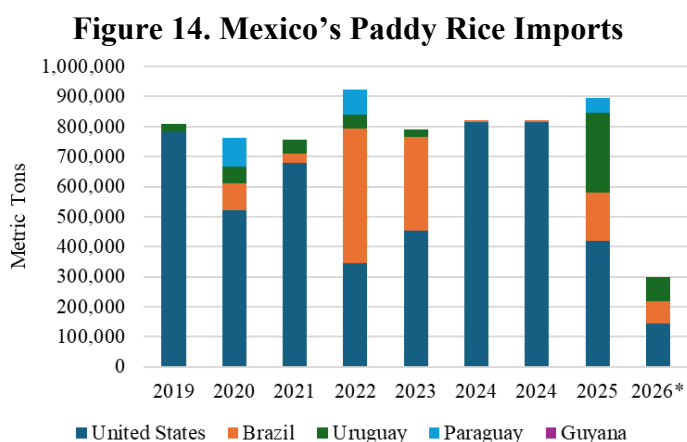
Harvest began in May in Campeche and is expected to conclude in late June. Early reports indicate average yields of 6.0 MT/HA for medium-grain rice and 7.0 MT/HA for long-grain rice. Through Plan Campeche, SADER supported smallholder producers by providing 100 kilograms (220 pounds) of certified seed per hectare, discounted-rate loans, crop insurance, and technical assistance.

Trade

MY 2026/2027

Imports

Rice imports are forecast to increase by four percent to 830,000 MT driven by consumption growth. Since domestic output stays well below total demand, imports are expected to continue covering most of Mexico's rice needs. South American suppliers have expanded their share of Mexico's rice imports in recent years. In paddy rice, a segment historically dominated by the United States, Uruguay, and Brazil increased market share through more competitive prices and higher milling yields.

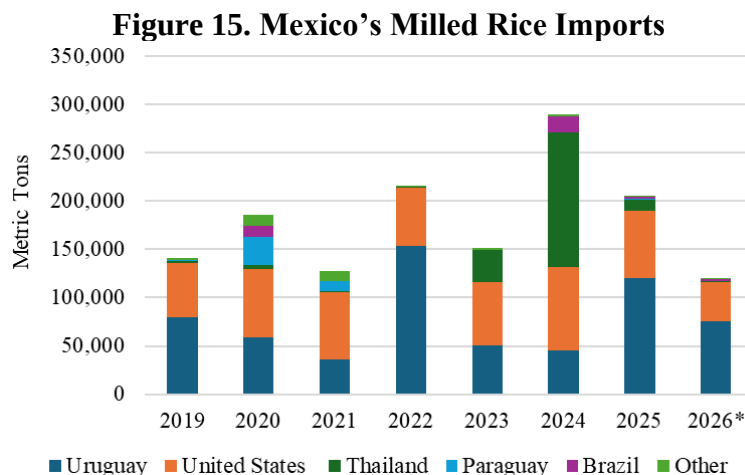


Source: Trade Data Monitor

*January through April 2026

The shift has been even more pronounced in milled rice, where Uruguay has become the leading supplier, followed by the United States and Brazil. Meanwhile, importers have increased purchases of

milled rice, which now accounts for roughly 25 percent of total rice imports. Demand from low-cost retailers and relatively weak international prices have supported imports of finished rice over domestically milled paddy.



Source: Trade Data Monitor

*January through April 2026

Exports

Rice exports in MY 2026/2027 are forecast stable at 30,000 MT as Mexico's limited exportable supplies caps volumes despite consistent U.S. niche demand.

MY 2025/2026

Imports

Post estimates MY 2025/2026 rice imports at 800,000 MT, down ten percent from the previous year, as rice millers draw down stocks while consumption remains stable.

From October 2025 through April 2026, Mexico imported 450,532 MT of rice, down 11 percent year-on-year. Paddy rice accounted for 73 percent of imports, while milled rice accounted for 27 percent. The United States supplied 39 percent of total imports, primarily paddy rice, followed by Uruguay with 36 percent, mainly long-grain milled rice, and Brazil with 24 percent. Other origins accounted for the remaining one percent.

The United States supplied 40 percent of paddy rice imports, followed by Brazil with 32 percent, Uruguay with 27 percent, and Guyana with one percent. Most U.S. paddy rice entered through the port of Veracruz or by rail through Nuevo Laredo and Nuevo Progreso, Tamaulipas, while South American paddy rice primarily arrived through Veracruz.

Mexico imported 119,749 MT of milled rice, down four percent year-on-year. Uruguay supplied 63 percent of milled rice imports, followed by the United States with 34 percent. Roughly 60 percent

entered through Veracruz, 25 percent by truck through Tijuana, and the remainder through other maritime ports and land border crossings.

After [paddy rice exited](#) the Anti-Inflation Package (PACIC) on December 31, 2025, the Secretariat of Economy [established a 200,000 MT](#) duty-free import quota for paddy rice (HS 1006.10.99) for calendar year 2026. Imports within the quota enter duty-free, while imports above the quota pay the 9 percent MFN tariff. U.S. and Canadian paddy rice continue to enter duty-free under the USMCA.

The government canceled the first quota auction on March 6, 2026, because only one bidder met the eligibility requirements. As a result, no quota has been allocated, and paddy rice from Brazil and other non-FTA origins continues to face the 9 percent MFN tariff.

Exports

Rice exports in MY 2025/2026 are estimated 11 percent higher at 30,000 MT, primarily consisting of specialty rice varieties and broken rice used by the U.S. brewery industry.

Consumption

Post forecasts MY 2026/2027 total rice consumption at 1.01 MMT, up one percent from the previous year, driven by continued population growth. According to Mexico's National Population Council (CONAPO), the population will grow by 0.75 percent in 2026 to 134.4 million people. With per capita rice consumption holding steady at 6.5 kilograms per year, population growth is expected to account for the modest increase in demand, as consumers typically eat rice as a side dish rather than a staple food.

Total consumption in MY 2025/2026 is estimated stable at 1.0 MMT due to steady retail prices throughout the marketing year.

Stocks

Ending stocks in MY 2026/2027 are forecast to decrease by 18 percent to 82,000 MT as millers draw down inventories. Rice stocks are typically held by cooperative warehouses, millers, and the government.

Ending stocks in MY 2025/2026 are estimated to decline by 32 percent to 100,000 MT due to a drawdown of milled rice inventories from relatively high levels.

SORGHUM

Table 5. Mexico, Sorghum Production, Supply and Distribution

Sorghum	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Mexico	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1200	1200	1000	1100	1100	1200
Beginning Stocks (1000 MT)	269	269	230	280	179	179
Production (1000 MT)	4200	4150	3200	3600	3800	4150
MY Imports (1000 MT)	562	562	450	500	300	300
Total Supply (1000 MT)	5031	4981	3880	4380	4279	4629
MY Exports (1000 MT)	1	1	1	1	1	1
Feed and Residual (1000 MT)	4700	4600	3600	4100	4000	4300
FSI Consumption (1000 MT)	100	100	100	100	100	100
Total Consumption (1000 MT)	4800	4700	3700	4200	4100	4400
Ending Stocks (1000 MT)	230	280	179	179	178	228
Total Distribution (1000 MT)	5031	4981	3880	4380	4279	4629
Yield (MT/HA)	3.5	3.4583	3.2	3.2727	3.4545	3.4583

(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 2026/2027 = October 2026 - September 2027

Production

MY 2026/2027

Sorghum production in MY 2026/2027 (October–September) is forecast 15 percent higher at 4.2 MMT as farmers in key producing states shift from corn to sorghum due to lower production costs. Despite a rebound, production remains seven percent lower than the 10-year average due to higher input prices and low crop prices. Harvested area is forecast to increase nine percent to 1.2 million HA.

Spring/Summer Sorghum

Spring/summer sorghum planting intentions for MY 2026/2027 are forecast higher, driven by lower input costs relative to corn and steady feed demand. In Guanajuato, Michoacán, and Jalisco—jointly producing roughly 65 percent of spring/summer sorghum—planting intentions are above last year.

As of early June, planting is ten percent complete nationwide for the spring/summer cycle, with most activity concentrated in southern Guanajuato and northern Michoacán. About 90 percent of planting occurs between late June and September.

Fall/Winter Sorghum

Planted area for fall/winter sorghum is expected to slightly rebound following a sharp decline in the previous cycle due to low water availability and drought conditions. Tamaulipas typically accounts for 85 percent of total sorghum area.

MY 2025/2026

Sorghum production in MY 2025/2026 is estimated 13 percent lower at 3.6 MMT. Estimated production is the lowest in over 30 years. Low water availability, persistent drought conditions in Tamaulipas, and decreased profitability are the main factors that drove down production.

Spring/Summer Sorghum

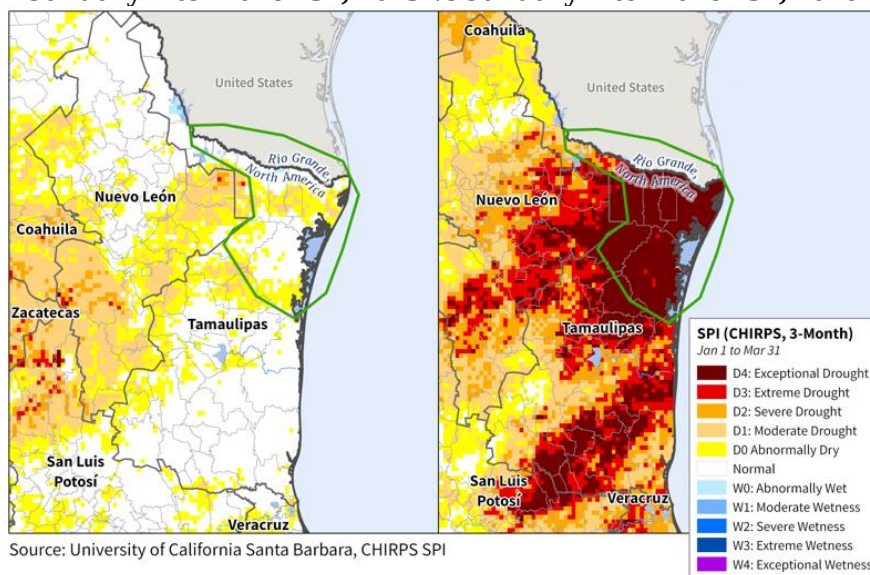
According to SIAP, 429,358 HA of sorghum was harvested during the spring/summer cycle, producing 1.9 MMT with an average yield of 4.42 MT/HA. Production dropped six percent from the previous year due to lower crop profitability. Over 70 percent of this cycle is rainfed and largely harvested between November and February.

In Guanajuato, harvest area declined by nine percent to 126,720 HA, as lower sorghum prices prompted some farmers to leave land idle. Production is estimated four percent lower at 837,680 MT. Over 65 percent of planted area is irrigated with water from reservoirs and aquifers. In January 2026, the farmgate price for sorghum in Tamaulipas was 21 percent lower than the previous year at 3,700 pesos (USD 215) per MT.

Fall/Winter Sorghum

The harvest is 15 percent complete, with peak harvest expected in Tamaulipas between July and September. Planted area is estimated 11 percent lower at 715,000 HA due to reduced water availability and lower crop prices. Tamaulipas, which accounts for approximately 85 percent of fall/winter sorghum production, reported planted area 15 percent lower at 575,000 HA, the lowest level in more than 30 years. Approximately 80 percent of the area was planted between late January and late March amid severe drought conditions and limited water availability.

**Figure 16. Standardized Precipitation Index in Tamaulipas
January 1 to March 31, 2025 vs January 1 to March 31, 2026**



Source: International Production Assessment Division (IPAD)

Harvest began in May in San Fernando, northern Tamaulipas, with early yields of rainfed sorghum averaging 1.8 MT/HA, below expectations due to initial stage drought, reduced soil moisture, and higher-than-average temperatures.

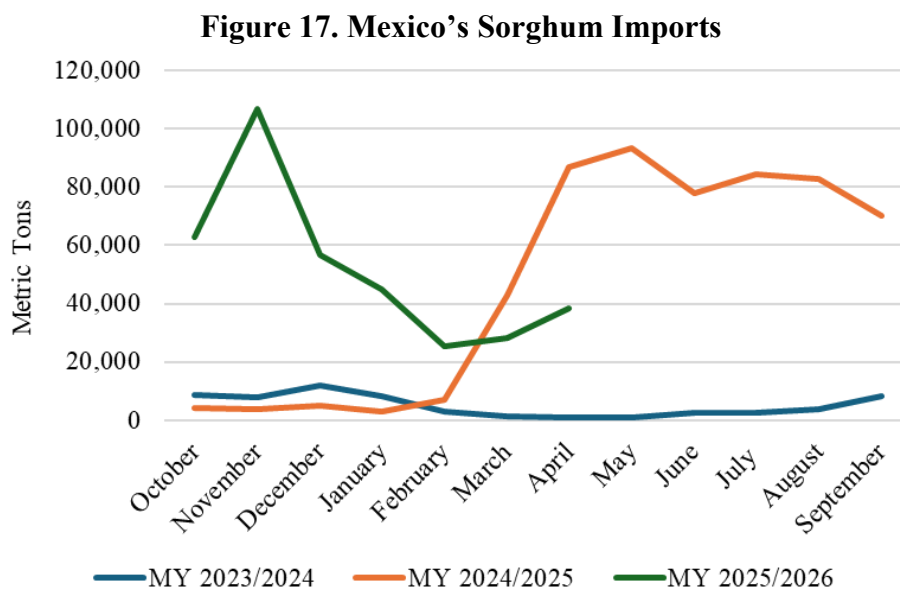
In November 2025, the state government announced that sorghum farmers could access the [Harvesting Sovereignty](#) Program with loans at discounted rates (8.5 percent) and a subsidy toward crop insurance.

At the start of harvest, farmgate prices averaged 4,300 pesos (USD 250) per MT. However, by early June, prices dropped to 3,700 pesos (USD 215) per MT in response to decreased international prices. Farmer associations report that farmgate prices do not cover production costs due to higher input prices.

Trade

Sorghum imports for MY 2026/2027 are forecast to decrease by 40 percent to 300,000 MT based on an expected rebound in domestic production. Virtually all sorghum imports originate from the United States.

In MY 2025/2026, imports are estimated 11 percent lower at 500,000 MT, due to a drop in consumption based on feed operations preference of yellow corn over sorghum due to price competitiveness and year-round availability. Roughly 75 percent of imports arrive by truck through Laredo and Progreso while approximately 25 percent come by railway through Ciudad Juárez.



Source: Trade Data Monitor

Consumption

Total sorghum consumption in MY 2026/2027 is forecast to increase by five percent to 4.4 MMT, supported by higher expected production and feed demand near producing regions.

Sorghum consumption in MY 2025/2026 is estimated to decline by 11 percent to 4.2 MMT, due to lower domestic production from drought-reduced harvests, particularly in Tamaulipas. Price competitive imported sorghum helped support feed use during the year.

Stocks

Ending stocks for MY 2026/2027 are forecast to rise 27 percent to 228,000 MT, supported by higher projected production.

Ending stocks for MY 2025/2026 are estimated 36 percent lower at 179,000 MT as significantly lower production drew down inventories. Sorghum stocks are largely held by traders, collection centers, integrated livestock operations, and compound feed facilities.

POLICY (all grains)

Presidential Anti-Inflation Decree

On December 31, 2025, the Government of Mexico [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, 2026, but companies registered under the program may use the benefits of the decree until March 31, 2027.

Long grain paddy rice (HS code:1006.10.99) was removed from the program. In addition, a January 5, 2026, [administrative act](#) by the Secretariat of Economy set a maximum quota of 200,000 MT for duty-free rice imports from Brazil and other non-FTA countries for calendar year 2026. Imports above the quota are subject to Mexico's most favored nation (MFN) tariff of 9 percent. The grains and related products with duty-free access included in the decree are listed below (see Gain Report [MX2026-0003](#)).

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.
10.07	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
MX2026-0018	Grain and Feed Annual	03/13/2026
MX2026-0005	Grain and Feed Update	01/26/2026
MX2025-0048	Grain and Feed Update	09/22/2025
MX2025-0030	Grain and Feed Update	06/23/2025
MX2025-0013	Grain and Feed Annual	03/21/2025

Attachments:

No Attachments