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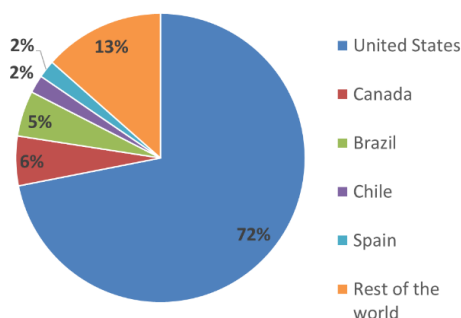
Report Highlights:

Mexico's gross domestic product (GDP) surpassed \$1.8 trillion in 2024. The economy continues to grow, and it is driven by population growth, consumer demand for convenience, premium, and health-conscious products. The U.S. remains Mexico's top supplier of food ingredients, with bilateral agricultural trade reaching \$79 billion in 2024. The food processing industry represented four percent of Mexico's GDP in 2024. Processed meat, dairy, and bakery goods dominate the sector, supported by strong consumer demand and ongoing product innovation. Leading companies like Grupo Bimbo, Coca-Cola, Sigma Alimentos, and Gruma shape the market. Mexico's proximity to the United States, robust trade agreements, dynamic industry landscape, and evolving consumer preferences, offer numerous opportunities for U.S. food ingredient exporters.

Executive Summary: In 2024, Mexico was ranked among the 15 largest economies in the world, with a gross domestic product (GDP) estimated at over \$1.8 trillion,¹ with an estimated 1.2 percent growth from 2023. Agricultural trade between Mexico and the United States reached \$79 billion in 2024, an increase of nearly 7 percent from the previous year. Mexico is the largest market for U.S. exports reaching over \$30 billion. U.S. meat and meat products, dairy, processed vegetables, and confectionary exports to Mexico continue to demonstrate strong market opportunities.

Food Retail Industry: Mexico's retail sector remains a dynamic industry, growing at over seven percent in 2024 to reach more than \$80 billion. Modern chains like Walmart and Soriana continue to attract middle and high-income consumers, while e-commerce, including grocery and food apps, are increasing in popularity. Retail trends include private label products, healthy snacks and confectionary goods, and plant-based alternatives for meat and dairy. For more information, please see our [Retail Foods](#) report.

Mexico's Consumer-Oriented Agricultural Imports 2024²



Food Processing Industry: Mexico's food processing industry continues to expand, representing four percent of Mexico's total GDP in 2024. Mexico's processing sector is innovative and relies heavily on U.S. inputs. Processed meat, dairy, bakery goods, and confectionery lead the sector, with major players like Grupo Bimbo, Coca-Cola, Sigma Alimentos, and Gruma driving market trends. Strong trade agreements, a well-developed supply chain, and evolving consumer preferences position Mexico as a key U.S. food ingredient export market.

Food Service Industry: Mexico's foodservice sector continues to grow, with an estimated GDP value in 2023 of \$38.28 billion and tourism driving increased demand. Mexico remains dependent on imported food and beverages, with the United States supplying nearly 70 percent of imports of consumer-oriented products in 2023 and 2024. Please see our [Food Service](#) report for more information.

¹ National Institute of Statistics and Geography (INEGI) estimates for 2024.

² Trade Data Monitor LLC consulted March 27, 2025.

Quick Facts CY 2023/24

2024 Mexican Consumer-Oriented Product Imports

(Trade Data Monitor LLC)

US \$19.3 billion – from World

US \$13.9 billion – from U.S.

List of Top 10 Growth Products in Host Country 2024

(Trade Data Monitor LLC)

- | | |
|----------------------|------------------------------------|
| 1) Corn | 6) Poultry Meat & prod. |
| 2) Pork & Pork Prod. | 7) Beef & Beef Products |
| 3) Essential Oils | 8) Soybeans |
| 4) Dairy Products | 9) Sugar & Sweeteners |
| 5) Forest Products | 10) Soup & Other Food Preparations |

Top 10 Mexico Food and Beverage Processors by sales 2023

- | | |
|----------------------|---------------------|
| 1. Grupo Bimbo | 6. Gruma |
| 2. Coca-Cola Femsa | 7. Grupo Lala |
| 3. Arca Continental | 8. Nestle Mexico |
| 4. Sigma Alimentos | 9. Mondelez Mexico |
| 5. PepsiCo Alimentos | 10. Pilgrim's Pride |

Source: [Statista](#), based on estimated value of chain retail sales

GDP/Population

Population (millions): 132.3

GDP 2023 (USD): \$1.8 trillion, estimate 2024 growth 1.2%

GDP per capita 2023 (USD): \$13,790 ([World Bank](#))

Strengths/Weaknesses/Opportunities/Threat

Strengths	Weaknesses
Mexico's Improved Production Methods and Advanced Technology — Food processors have invested in automation and advanced technologies to improve efficiency, reduce labor costs, and ensure consistent product quality.	Price Sensitivity — Despite a growing middle class, cost remains a major factor in purchasing decisions, limiting the adoption of premium and imported ingredients.
Opportunities	Threats
Preference for U.S. Products — As Mexican food processors increase demand for high-quality, U.S.-sourced ingredients have more opportunities in the Mexican market.	Local and 3rd Country Competition — Domestic ingredient producers and competitors from countries like Canada and Brazil.

Section I: Market Overview

In 2024, Mexico ranked among the 15 largest economies in the world. Mexico remains a developing economy with relative macroeconomic stability, multiple trade agreements, and a diversified manufacturing base, currently benefitting from increased investment due to near-shoring trends in several products’ supply chains, remittances, and consumer spending. The country’s economy estimated growth for 2024 was 1.2 percent, most recent data available, below the 3.1 percent growth of 2023, and is expected slow even more in 2025.³

Domestic demand remains stable despite inflationary pressures; inflation seems to be under control at 4.21 percent in 2024, according to INEGI.⁴ Consumption remains robust, supported by low unemployment and remittances (nearly \$65 billion in 2024).⁵ Investment saw a slight slowdown in 2024, due to deceleration in some public infrastructure projects. Exports and manufacturing experienced growth, thanks in part to manufacturing relocation. Still, many social and economic challenges remain. Political changes, both domestic and foreign, have amplified the global economic uncertainties. Poverty rates and inequality remain high. Informality, corruption, fiscal deficit, and abrupt changes in regulations and insecurity in some regions can undermine potential economic growth.

In 2024, Mexico's food and beverage processing industry remained strong and continued to grow into a dynamic and robust sector representing four percent of Mexico’s total GDP and 20 percent of the manufacturing industry’s GDP. Bilateral agricultural trade between Mexico and the United States is the largest worldwide reaching nearly \$79 billion in 2024. Mexico is the number one market for U.S. agricultural products with exports totaling \$30 billion and representing an increase of nearly 7 percent from the previous year (Table 1; see full table in Appendix A).⁶ Mexico’s close proximity to the United States also contributes to its growing processing sector as Mexican consumers become familiar with U.S. trends and sometimes prefer adding a Mexican flavor twist. Mexican manufacturers rely on U.S. meats, dairy, nuts, and confectionary products to meet the demand for trending processed meat, cheese products, baked goods and sweets. Additionally, market opportunities for ingredients used in popular salsas continue to grow and new trends for Asian products, healthy snacks and functional foods (like oats, berries, probiotic drinks, fortified milk, etc.) are increasing. Furthermore, Mexican manufacturers are investing in advanced technologies to improve packaging and using more ecofriendly materials as more consumers become increasingly concerned with the environment.

Table 1. Top Five U.S. Exports to Mexico in 2024

Commodity	Total Value (USD)	10-Year growth
Corn	\$5.62 billion	144%
Pork & Pork Products	\$2.58 billion	104%
Dairy Products	\$2.47 billion	96%
Soybeans	\$2.3 billion	61%
Poultry Meat & Prods. (excl. eggs)	\$1.47 billion	43%

Source: [USDA/FAS](#) 2024

³ Bank of Mexico prediction for Mexico’s GDP Growth in 2025 adjusted in February 2025. Source: [El Pais](#).

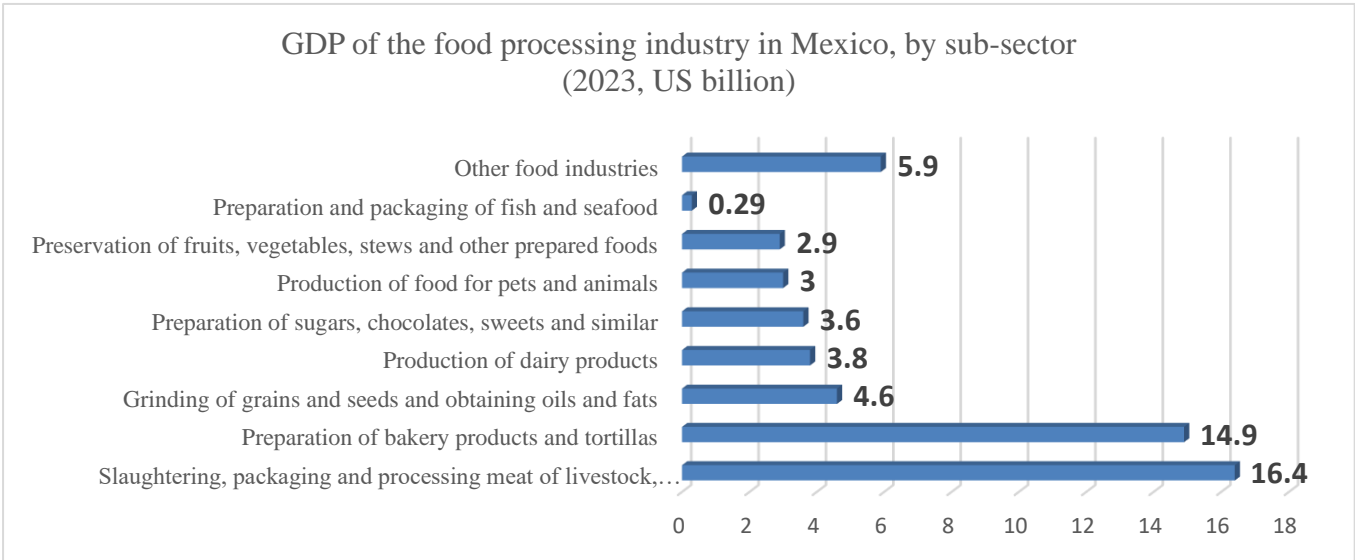
⁴ Source: Trading Economics and Market Watch with information from INEGI.

⁵ Source: [El Pais](#) with information from Bank of Mexico.

⁶ USDA, [FAS](#)

Within the food processing industry in Mexico, the biggest subsector is the meat processing industry (beef, pork, poultry, seafood) representing approximately 30 percent of the food processing industry (\$16.4 billion in 2023), followed by the bakery and tortilla production subsector. Graph 1 contains all the subsectors making up the food processing industry in Mexico and their GDP worth in 2023 (latest available data.)⁷

Graph 1. Food Processing Industry GDP by Sub-Sector in Mexico (2023)



Source: Retrieved from [Statista 2024](#). Gross Domestic Product (GDP) of the food and beverage industry in Mexico in 2023, by sub-sectors.

In 2024, Mexican exports to the United States grew to nearly \$49 billion. As Mexico increases its food exports (e.g. spirits, salsas, bakery goods, canned fruits and vegetables), the industry’s demand for premium ingredients continues to grow. The United States-Mexico-Canada Agreement (USMCA) further facilitates trade relations, making Mexico a prime market for U.S. exporters. Key drivers for Mexico’s food processing industry success include:

- **Location and available resources:** Proximity to the United States provides easy access to ingredients, technologies, and the largest bilateral agricultural trading partners worldwide. Mexico’s diverse climate supports large scale production of raw materials (fruits, vegetables, meat, dairy products, some grains), which helps reduce some costs for local processors.
- **Developed trade infrastructure:** Efficient import and export operations reduce costs and enhance supply chain reliability.
- **Growing demand:** An increasing population, a rising middle-class income levels, and increased exports drive demand for convenient, healthy, high-quality processed foods.
- **Investment in technology:** Ongoing investments in modern production facilities and shifts in consumer preferences (e.g. by following trends from the U.S.) position Mexico as a growing market for both local and international suppliers.

⁷ The most recent comprehensive data available is from 2023. However, industry trends in 2023–2024 suggest continued expansion, supported by factors such as increased investment in processing facilities

Expansion within Mexico is also generating new opportunities outside the main three cities (Mexico City, Monterrey and Guadalajara). For different reasons, including proximity to raw materials, logistical facilitation, less congestion and easier expansion in less densely populated areas, increased regional market demands, and incentives from local governments, manufacturers have facilities outside of the big three cities and throughout the country. For example, Estado de Mexico, Jalisco, Nuevo León, Guanajuato, and Mexico City—have the most processing facilities, largest workforces, and highest contributions to the industry's GDP (see Graph 2 for additional rankings, latest available data from 2022).⁸ Estado de Mexico hosts processing plants from Grupo Bimbo (bakery products), Lala (dairy products), Gruma (corn products), Sigma Alimentos (meat and dairy products), Grupo Herdez (canned goods, salsas), La Costeña (canned goods, salsas), and Mondelez (confectionary and snacks). Jalisco is home to companies like PROAN (egg products and meat), Nestle (cereals, confectionery, beverages, baby food, pet food), Mars (pet food), and Sigma Alimentos. Nuevo Leon, a central industrial hub, attracts significant investment thanks to its advanced infrastructure, skilled labor force, and proximity to the U.S. border. It hosts processors like Sigma Alimentos, PROBOCA (meat products), Ragasa (oil production), Gruma, and Mars (confectionary).

Sector Trends

Automation and digitalization: Mexico's food processing industry uses automation and advanced technologies to be more efficient, reduce labor costs, and ensure consistent product quality. This includes robotics and artificial intelligence (AI) for quality control and traceability systems across the supply chain, helping processors meet the demand for high-quality, safe, and sustainable food products. Companies are trying to invest more in these technologies, in order to make their operations more efficient.

Convenience food: Mexico's growing demand for convenient, ready-to-eat foods — especially among young consumers — is driving innovation in the food processing industry. This industry stimulates innovation by creating consumer-driven products like snacks with probiotic or functional ingredients, grab-and-go packaging that appeals to consumers or new techniques to preserve freshness and flavor. Key ingredients for this sector include grains, dairy products, cocoa, various flours, sugar, fresh fruits, and nuts, among others.

Environmentally Conscious: With growing environmental awareness, Mexican consumers are pushing the food processing industry toward more sustainable practices. Companies (mainly big companies, for example Bimbo or Nestle) are investing in energy-efficient technologies, waste reduction, and eco-friendly packaging options. Some also adopt carbon footprint reduction strategies or talk about circular economy and upcycling by-products (for example using leftover fruit pulp to produce jams).

Health-Conscious Products: While Mexican consumers still enjoy indulgent foods, there is a growing demand for healthier, more natural options. Food processors are integrating low-sugar, low-calorie, gluten-free, and additive-free ingredients and added fiber, probiotics, and reduced sodium and trans fats. In Mexico, NOM051 regulations are also driving product reformulations. Additionally, processors are incorporating functional ingredients (for example spinach and beets) into beverages, snacks, and dairy products to meet health-conscious consumer demand.

⁸ The most recent comprehensive data available is from 2022. However, industry trends in 2023–2024 suggest continued expansion, supported by factors such as nearshoring and increased investment in processing facilities.

Increased Preference for Mexican Products: Several Mexican food processing companies are expanding globally, driving export growth, particularly in salsas, sauces, baked goods, and spirits. This export expansion creates opportunities for U.S. ingredient suppliers as these companies will need more high-quality, consistent, and safe ingredients. Mexico’s exports of agri-foods grew 14 percent from 2023 to 2024 and are valued at \$43.3 billion.

Table 2. Advantages and Challenges Facing U.S. Ingredients in Mexico

ADVANTAGES	CHALLENGES
Mexico’s proximity to the U.S. reduces shipping costs and delivery times, while the deep integration of both economies and familiarity with U.S. brands, flavors, and practices make American food ingredients particularly appealing to Mexican processors and consumers.	Local suppliers offer cost-effective alternatives, and the “buy local” trend encourages sourcing domestic ingredients, which can make imported goods more expensive, especially when factoring in shipping, tariffs, and exchange rates.
The growing Mexican middle class and increasing demand for diverse, premium, and imported food products create significant opportunities for U.S. food ingredients as consumers seek higher-quality options.	Violence, crime and issues at the border, such migrant surges and transportation strikes, can disrupt commerce, increase costs, cause delays, particularly for time-sensitive products like fresh and frozen products. Insecurity can discourage food processors from investing in Mexico. These challenges increase the costs of imported product prices compared to locally made goods that use local ingredients.
As the local food processing industry expands both domestically and in export markets, the rising demand for ingredients provides U.S. suppliers with an opportunity to meet these needs, especially since Mexico depends on imports for key products like corn, soybeans, wheat, and meat.	Despite a growing middle class, Mexico remains price sensitive. Exchange rates, shipping costs, tariffs, and insurance can increase the cost of imported ingredients, making final products more expensive and potentially less attractive to consumers, especially amid rising inflation. Mexico’s trade agreements with over 40 countries create additional competition for U.S. food products
USMCA provides better market access, reduced tariffs, and smoother trade regulations providing U.S. food ingredients with a competitive advantage over products from other countries without a free trade agreement.	Mexico has implemented strict regulations regarding food safety, labeling, and health standards. U.S. food exporters, including food ingredients, must ensure compliance to avoid delays, rejections, or fines when exporting.

Section II: Roadmap for Market Entry

FAS/Mexico recommends that U.S. exporters, especially those new to export, contact their [State Regional Trade Groups](#) (SRTGs) and/or their Departments of Agriculture in order to get them export-ready (this includes, depending on the product, defining a correct Harmonized System (HS) code for your product and complying with U.S. regulations before exporting i.e. Food and Drug Administration (FDA) certificates and U.S. Department of Agriculture (USDA) certificates, etc.) for detailed information regarding the Mexican market and competition in it. The activities that the SRTGs conduct in the market, such as trade missions, buying missions, marketing campaigns, and promotional activities, are done in coordination with FAS.

U.S. exporters should contact local Mexican distributors/importers early when entering the market. Local distributors/importers handle permits and payments and complete the import process.⁹ A good distributor understands local policies, local practices (such as payment terms and schedules, which can vary from company to company), regulations, and sales promotion while ensuring product availability. They should also be able to anticipate challenges like transportation delays and border issues. Maintaining close contact with Mexican counterparts is key to staying updated on import procedures and official requirements. See Appendix C for a chart on Exporting to Mexico.

For a deeper look, see publicly available reports on the USDA's Foreign Agricultural Service (FAS) and Global Agricultural Information Network (GAIN) [website](#), specifically the [Exporter Guide](#), which provides general recommendations for first-time exporters to Mexico. Also available is the chapter on [Business Customs](#) within the U.S. Department of Commerce's Country Commercial Guide.

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

Processing companies in Mexico source ingredients based on their size and reach. Multinationals typically have a global procurement office or dedicated department to source directly from exporters, including those in the U.S. In contrast, medium and small companies often rely on distributors or brokers. A key first step for small and medium exporters is to contact a local importer or distributor, as they have established relationships with food processors, helping facilitate market entry. See Appendix B for a chart of Mexico's distribution channels. Food importers and distributors in Mexico handle various tasks, including customs clearance, regulatory compliance, and market distribution. Their pricing structures vary based on negotiations with the exporter and typically include:

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

Charges vary based on shipment volume, product type, and service level. It's essential to clarify pricing conditions upfront and understand all costs involved in the importing process before agreeing. Consider that the best market-entry strategy depends on your product. For companies entering or expanding in Mexico, trade shows are an excellent way to gain market insights, establish contacts, and build relationships with importers, distributors, and processors while learning about local food trends and industry infrastructure. Key trade shows in Mexico for U.S. companies supplying food ingredients are:

- [Food Tech Summit & Expo](#): The most significant food ingredient and processing show held annually in Mexico City with over 450 exhibitors. The show specializes in food ingredients, additives, packaging, and machinery for the food and beverage processing industry.
- [Expo ANTAD](#): The most significant retail trade show in Mexico, with over 1200 exhibitors and 65 participating countries. Members of ANTAD include the most important food manufacturers and retailers, and ANTAD organizers offer a match-making service. More than 52 thousand people visit the show every year. It is a great show to gain insights into Mexico's most important food trends.

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

Section III: Competition

The Mexican food processing industry often seeks to source inputs from local suppliers due to their market knowledge, cost advantages, and logistical benefits. However, some local suppliers may struggle with quality, traceability, or meeting large order requirements, which leads the industry to rely on imports to fill these gaps. While U.S. agricultural products face strong competition in Mexico, they are still highly regarded for their quality and ease of access. By leveraging the USMCA and its established supply chains, U.S. suppliers can capitalize on these gaps and position themselves as key partners in meeting Mexico's growing demand for high-quality food ingredients.

In 2024, Mexico imported \$19.3 billion¹⁰ of consumer-oriented products. The United States was Mexico's leading supplier of this category, accounting for \$13.9 billion, or 72 percent of Mexico's total consumer-oriented products imports. Third-country suppliers, notably Canada, Brazil, Chile and Spain, accounted for 15 percent of these imports, competing directly with U.S. exports.

According to latest available data (2023) Grupo Bimbo, which uses ingredients like flour, made of U.S. wheat, led Mexico's food industry with approximately \$22.5 billion in sales. Sigma Alimentos, sourcing chicken, pork, turkey, and dairy, from U.S. origin, ranked second with \$8.5 billion. Coca-Cola, importing sucralose and concentrates, was the top beverage company, with sales reaching nearly \$13.8 billion. The top ten food and beverage companies in Mexico by sales value in 2023 were:¹¹

- | | |
|---|--|
| 1. Grupo Bimbo (\$22.5 billion) | 6. Gruma (\$6.5 billion) |
| 2. Coca-Cola Femsa (\$13.8 billion) | 7. Grupo Lala (\$5.6 billion) |
| 3. Arca Continental (\$12.0 billion) | 8. Nestlé México (\$5.0 billion) |
| 4. Sigma Alimentos (\$8.5 billion) | 9. Mondeléz México (\$3.0 billion) |
| 5. PepsiCo Alimentos México (\$6.6 billion) | 10. Pilgrim's Pride México (\$2.1 billion) |

Section IV: Best Product Prospects

The Mexican food processing industry requires different raw materials, ranging from bulk products like corn, soybeans, wheat, and rice to consumer-oriented items such as pork, beef, chicken, turkey, and dairy products. In 2024, key consumer-oriented imports from Mexico (Table 3) included meat products (pork, beef, poultry), dairy (cheese and powdered milk), soups and food preparations, bakery goods, cereals, and pasta. Table 3 includes consumer-oriented products that have the most demand in Mexico and provides insight into what countries are directly competing with the U.S. in those categories. Other notable product categories not listed in Table 3 included processed fruit (total imports of \$420 million), fresh vegetables (total imports of \$400 million), wine and related products (total imports of \$354 million), tree nuts (total imports of \$350 million), and spices (total imports of \$280 million).

¹⁰ Trade Data Monitor LLC Consulted March 19, 2025.

¹¹ [Statista](#) – Companies in the food industry with the highest sales value in Mexico in 2023. Sales in MXP converted to USD at a rate of 1US=17.7323 MXP.

Table 3. Mexico's imports of consumer-oriented products by category 2024 (\$U.S.)

Product Category	Mexico's imports from the world	Imports from the U.S.	Main competitors	U.S. Market Share 2023
Pork & Pork Products	\$ 3.6 billion	\$ 3 billion	-Canada -Brazil	83%
Dairy Products	\$ 2.4 billion	\$ 1.8 million	-New Zealand -Netherlands	75%
Poultry Meat & Products (ex. Eggs)	\$1.8 billion	\$ 1.2 billion	-Brazil -Chile	65%
Beef & Beef Products	\$ 1.8 billion	\$ 1.3 billion	-Brazil -Canada	74%
Soup & Other Food Preparations	\$ 1.4 billion	\$ 1.2 billion	-Spain -Italy	86%
Fresh Fruit	\$ 1 billion	\$ 819 million	-Peru -Chile	75%
Processed Vegetables	\$ 1 billion	\$ 644 million	-Canada -Belgium	62%
Bakery Goods, Cereals, & Pasta	\$ 987 million	\$ 650 million	-Canada -Italy	66%
Meat Products NESOI	\$ 611 million	\$ 512 million	-Spain -Canada	84%
Chocolate & Cocoa Products	\$ 536 million	\$335 million	-Canada -Malaysia	63%
Condiments & Sauces	\$ 513 million	\$ 458 million	-Spain -Italy	89%

Source: Trade Data Monitor LLC consulted March 19, 2025.

The imported products listed in Table 3 play a critical role in several subsectors of the food processing industry in Mexico. Below is a summary of the key developments and insights within some of these subsectors (specified in Section 1, Graph 1), highlighting notable milestones from 2024:

Processed meat and seafood:¹² Mexican consumers continue to prefer poultry over red meat due to its affordability, which is driving growth in chilled and frozen poultry products. In seafood, shelf-stable products dominate demand, while shelf-stable meats are sometimes perceived as high in salt and artificial additives. [Sigma Alimentos](#) leads Mexico's processed meat sector with a 25 percent market share, offering a range of chilled and frozen meats. [Pescados Industrializados S.A. de C.V.](#) is a key competitor, especially in the shelf-stable seafood segment, with popular brands like [Dolores](#) and [Mazatun](#). See Appendix D for the top ten companies in this category in 2024.

Dairy products: Consumption of semi-ripe cheeses is rising in Mexico, with growing demand for grated and sliced formats. Consumers seek a balance of health, flavor, and convenience, though price remains the primary factor in this cost-sensitive market, limiting the impact of health warnings. Expanding cheese consumption creates opportunities for cheese ingredients, high-quality milk proteins, and functional dairy components. Premium dairy products, including organic and probiotic-enriched options, are gaining traction among the upper middle class, driving interest in organic dairy powders, whey and casein proteins, probiotics, and high-calcium products. Plant-based dairy alternatives (almond, soy, oat, pea, coconut)

¹² Source: Euromonitor International, "Processed meat, seafood and alternatives to meat in Mexico, Country Report, 2024".

appeal to health-conscious and lactose-intolerant consumers but remain a niche segment. [Grupo Lala](#) and [Nestle de Mexico](#) lead the market with 19.3 and 10.4 percent of the market share, respectively.¹³

Bakery Goods, Cereals, and Pasta:¹⁴ Mexico's bakery goods, cereals, and pasta sector grew by 5 percent in 2024, reaching nearly \$31.9 billion. Tortillas remain the most consumed product due to affordability and cultural preference, while cakes and pastries grew, with cakes alone increasing 6 percent to over \$2 billion. Despite global health trends, indulgence drives demand, especially for pastries, cakes, and dessert mixes. Companies are responding by reformulating products to meet evolving consumer preferences and regulations, such as labeling requirements. [Grupo Bimbo](#) leads packaged baked goods with a 15 percent market share, while [Mondelez](#) leads in dessert mixes. However, artisanal bakeries remain dominant, accounting for 79 percent of the market share.

Processed fruits and vegetables:¹⁵ Retail sales of processed fruits and vegetables in Mexico grew by approximately 6 percent in 2024, reaching an estimated \$1.8 billion. Shelf-stable beans remain a staple in Mexican households, driving significant sales, while shelf-stable vegetables perform well. Trends show that frozen processed fruits and vegetables are becoming more popular due to their perceived health benefits and freshness, with packaging and marketing focusing on these qualities to attract health-conscious consumers. [Conservas La Costeña](#) leads the market, especially in shelf-stable beans and vegetables, holding 21 percent of the market share (see Appendix E).

Condiments and Sauces: Mexico's condiments and sauces sector is steadily growing, driven by demand for innovative blends of traditional and exotic flavors. Health-conscious consumers favor clean labels and beneficial ingredients. According to Euromonitor International (2024), The market expanded by 8 percent in 2024, reaching nearly \$5.4 billion. Globally, the rising popularity of Mexican flavors like mole and salsas is boosting export opportunities. Fusing local and international ingredients is shaping the market with natural, high-quality components —such as spices, chili powders, natural thickeners, sweeteners, and reduced-sodium options— appealing to both manufacturers and consumers. [Conservas La Costeña](#) led the market with a 25 percent share, followed by [McCormick de Mexico](#) at 7.7 percent. Smaller brands and private labels (e.g., Walmart's Great Value) held 22.7 and 4.2 percent, respectively.¹⁶

¹³ Source: Euromonitor International, "Dairy Products and Alternatives in 2024: The Big Picture".

¹⁴ Source: Euromonitor International, "Baked Goods in Mexico, Country Report, 2024".

¹⁵ Source: Euromonitor International, "Processed fruit and vegetables in Mexico, Country Report, 2024".

¹⁶ Source: Euromonitor International, "Sauces, Dips, and Condiments in Mexico, Country Report, 2024".

Section V: Key Contacts and Further Information

Agricultural Trade Office Mexico City Address: Liverpool 31 Col. Juarez Del. Cuauhtémoc Mexico City, CP 06600 http://www.fas.usda.gov	Phone: +52 (55) 5080-2000 ext. 5282 Email: AgMexico@usda.gov
Agricultural Trade Office Monterrey Address: Prol. Av. Alfonso Reyes #150 Col. Valle Poniente Santa Catarina N.L. 66196 http://www.fas.usda.gov	Phone: +52 (81) 8047-3100 ext. 3232 Email: AgMexico@usda.gov

Visit this [website](#) for available USDA programs, and consult the [FAS website](#) for more general information on services provided by FAS.

Government agencies in Mexico are responsible for policies regarding food and imports.

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 \(USMCA\)](#)

APPENDIX A

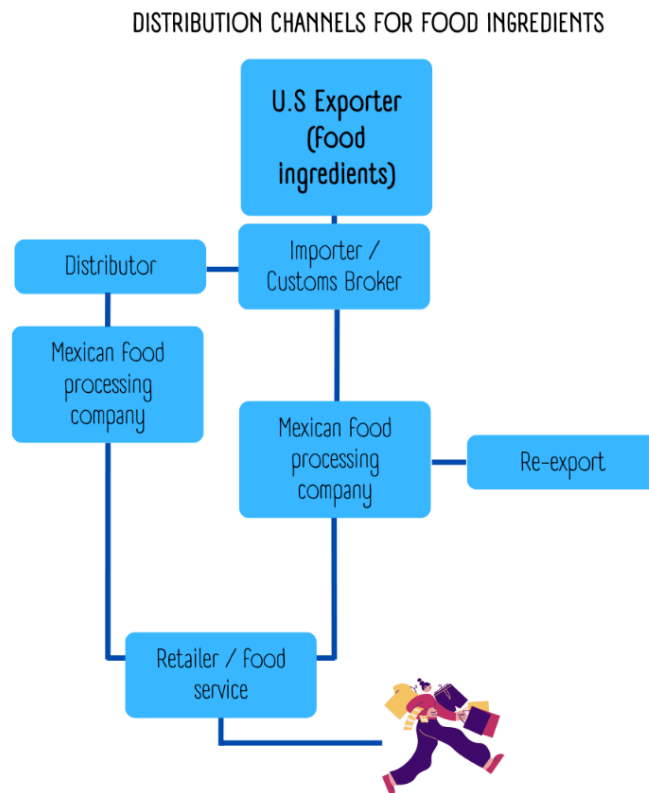
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Dairy Products	\$2.47 billion	96%
Soybeans	\$2.3 billion	61%
Poultry Meat & Prods. (excl. eggs)	\$1.47 billion	43%
Beef & Beef Products	\$1.35 billion	23%
Sugar	\$1.24 billion	97%
Food Preparations	\$1.17 billion	128%
Wheat	\$1.05 billion	61%
Fresh Fruit	\$978.76 million	75%

Source: [USDA/FAS](#) 2024

APPENDIX B

Chart 2. Distribution Channels for Food Ingredients in Mexico.



APPENDIX C

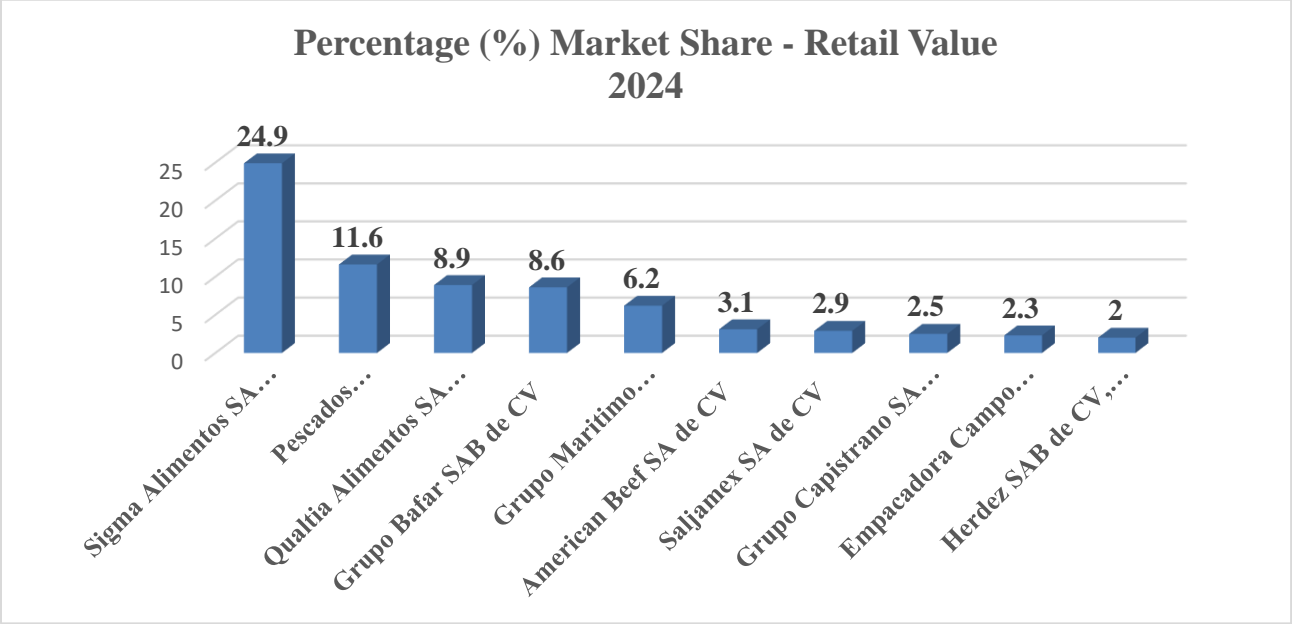
Chart 1. Exporting to Mexico.



Source: U.S. Commercial Service Mexico – Simplified Export Process.

APPENDIX D

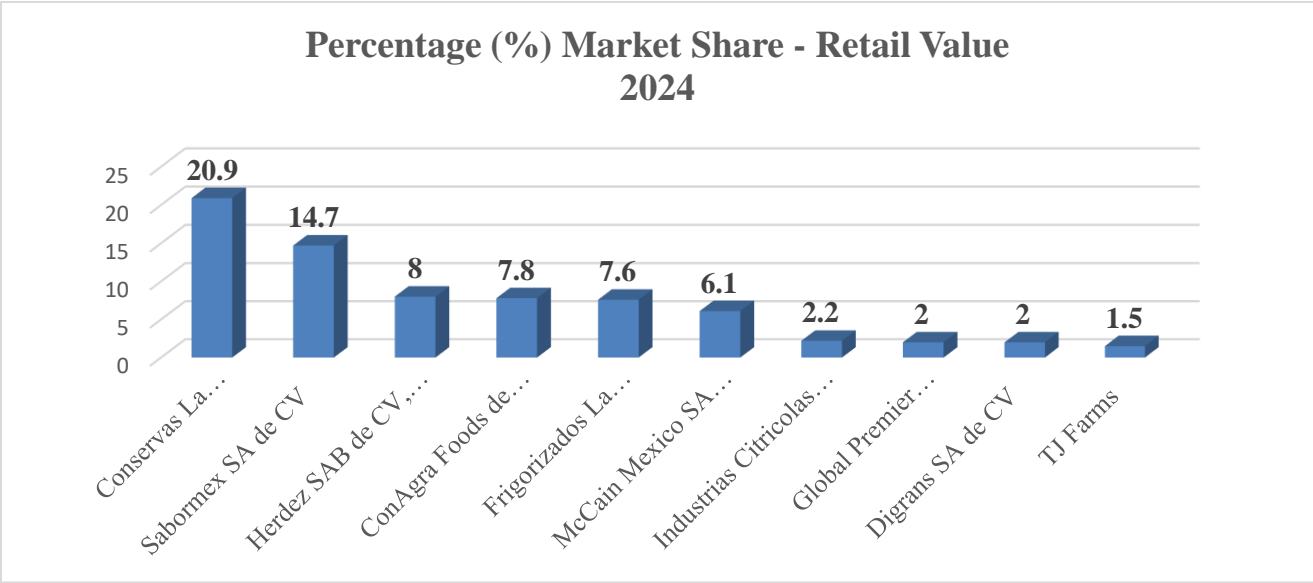
Key Players in the Processed Meat, Seafood and Alternatives to Meat Sub-Sector in Mexico, 2024.



Source: Euromonitor International. (2024). *Processed Meat, Seafood, and Alternatives to Meat in Mexico. Competitive Landscape. 2024*. Retrieved from [Euromonitor International](#).

APPENDIX E

Key Players in the Processed Fruit and Vegetables Sub-Sector in Mexico, 2024.



Source: Euromonitor International. (2024). *Processed Fruit and Vegetables in Mexico. Competitive Landscape*. Retrieved from [Euromonitor International](#).

Attachments:

No Attachments