

**Required Report:** Required - Public Distribution

**Date:** January 29, 2026

**Report Number:** MX2026-0005

## **Report Name:** Grain and Feed Update

**Country:** Mexico

**Post:** Mexico City

**Report Category:** Grain and Feed

**Prepared By:** Rodrigo Trejo

**Approved By:** Abigail Mackey

### **Report Highlights:**

The outlook for Mexican grain production in marketing year (MY) 2025/2026 is higher year-on-year for corn, rice, and sorghum based on favorable weather conditions, improved dam levels, and increased domestic demand for white corn. Wheat production is forecast lower based on weaker price expectations. Imports are forecast to increase for corn, wheat, rice, and sorghum, as domestic production remains insufficient to meet rising food and feed consumption. This report has been updated to correct wheat data for MY 2024/25 on pages 12-13.

## EXECUTIVE SUMMARY

Mexican grain demand in marketing year (MY) 2025/2026 is expected to remain robust, driven by continued 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 with structural constraints including rising input costs, lower prices, infrastructure challenges, and minimal financing mechanisms for medium and large producers.

Mexico’s corn production is forecast to recover by 12 percent to 26.0 million metric tons (MMT), driven by expected higher white corn prices compared to other grains, favorable weather, and gradual recovery of reservoirs following severe drought conditions in Sinaloa for two consecutive years. Estimated production remains 2 percent below the ten-year average as major producing states work to restore planted areas and increase yields. Imports are forecast slightly higher at 26.0 MMT based on steady growth in the livestock and feed sectors.

Wheat production is forecast down by 34 percent to 1.75 MMT due to low reservoir levels in Sonora and weaker prices. Imports are projected up 20 percent to 6.7 MMT, while exports are forecast down 26 percent to 100,000 metric tons (MT) on reduced durum output.

Rice production is forecast 17 percent higher at 189,000 MT, supported by strong demand for local rice. Imports are expected to slightly increase to 895,000 MT, reflecting importers’ expectations of higher milling of paddy rice.

Sorghum production is forecast to recover by 2 percent to 4.3 MMT, driven by improved weather conditions. Imports are projected up 14 percent to 600,000 MT due to tighter supplies and price competitive imported 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**  
Mexico – Crop Calendar



## CORN

**Table 1. Mexico, Corn Production, Supply and Distribution**

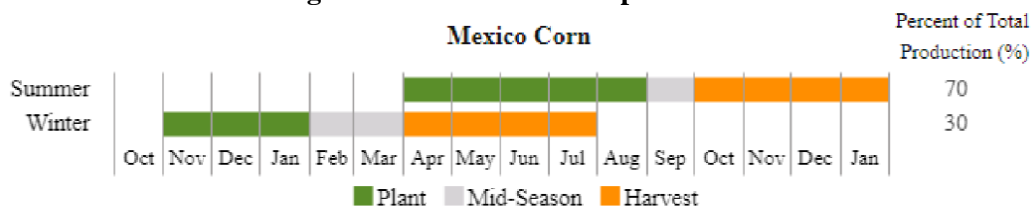
Corn Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
Mexico	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	6109	6109	6540	6540	6800	6800
Beginning Stocks (1000 MT)	4877	4877	5786	5786	5891	5891
Production (1000 MT)	23710	23710	23200	23300	26000	26000
MY Imports (1000 MT)	24222	24222	25930	25930	25800	26000
Total Supply (1000 MT)	52809	52809	54916	55016	57691	57891
MY Exports (1000 MT)	23	23	25	25	30	30
Feed and Residual (1000 MT)	25800	25800	27700	27700	29300	29600
FSI Consumption (1000 MT)	21200	21200	21300	21400	21700	21700
Total Consumption (1000 MT)	47000	47000	49000	49100	51000	51300
Ending Stocks (1000 MT)	5786	5786	5891	5891	6661	6561
Total Distribution (1000 MT)	52809	52809	54916	55016	57691	57891
Yield (MT/HA)	3.8812	3.8812	3.5474	3.5627	3.8235	3.8235

(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 12 percent to 26.0 MMT, supported by higher precipitation in the spring/summer cycle and a partial recovery of reservoirs in Sinaloa ahead of the fall/winter cycle. Planted area is forecast to rise 4 percent to 6.8 million hectares (ha), as higher reservoir levels in Sinaloa increased water permits. The forecast reflects the official harvest progress for the spring/summer cycle and fall/winter planting crops.

### Spring/Summer Corn

MY 2025/2026 spring/summer corn planted area is estimated to increase 2 percent to 5.8 million ha based on expectations of higher white corn prices, with harvest expected to conclude by March 2026. Approximately 85 percent of the crop is rainfed, consistent with historical patterns. Estimated yields are 4 percent higher at 2.8 MT/HA for rainfed production and 7 percent higher at 8.5 MT/ha for irrigated production. Total production is forecast at 20.0 MMT, up 4 percent year-on-year.

**Table 2. Spring/Summer Corn Planted Area in Hectares in Key Producing States**

State	MY 2025/2026	MY 2024/2025	Year Over Year % Change	5-Year Average	% Change
Jalisco	542,451	530,644	+2.2	554,632	-2.2
Guanajuato	314,303	324,824	-3.2	355,851	-11.7
Michoacán	452,900	458,978	-1.3	465,328	-2.7
México	480,397	474,380	+1.3	476,107	+0.9
Chihuahua	238,920	228,384	+4.6	230,176	+3.8
Chiapas	568,216	576,472	-1.4	575,318	-1.2
Guerrero	481,526	478,453	+0.6	479,170	+0.5
Puebla	476,007	481,253	-1.1	477,787	-0.4
Oaxaca	415,700	446,883	-7.0	440,333	-5.6
Veracruz	411,996	393,866	+4.6	396,375	+4.0

*Source: Service of Agriculture Information (SIAP)*

### *Chihuahua*

According to state-level authorities, roughly 220,000 ha of corn was harvested in Chihuahua and production in the state reached 1.7 MMT, a 7 percent annual increase. Nearly 1.4 MMT of the harvest was yellow corn (irrigated and rainfed) while 0.3 MMT corresponded to white corn, a 180 percent annual increase due to higher expected prices for white corn. The grain quality was reported as good and average yields for irrigated corn reached 14 MT/HA.

### *Bajío*

In Jalisco, harvest is virtually complete as of the end January 2025. According to the Mexican Agricultural and Fisheries Information Service (SIAP), farmers restored planted area for spring/summer corn with a 2 percent annual increase to 542,451 ha based on steady growth in demand for domestic white corn. Estimated average yield for irrigated corn in La Barca, key producing region, was 12 MT/ha while average yield for rainfed corn was 8 MT/ha. Farmers reported that fusarium and tar spot incidence increased in eastern regions and drove down yields. In Michoacán, harvest is largely finished. SIAP reports that planted area decreased by 3 percent to 324,824 ha due to expectations of limited and delayed government support. Average yield for irrigated corn is estimated at 11 MT/ha while rainfed corn is estimated at 4 MT/ha. In Guanajuato, harvest is complete. Harvested area is estimated 3 percent lower to 310,000 HA and the average yield for irrigated corn is estimated at 10 MT/ha while yield of rainfed corn is estimated at 3 MT/ha.

### *State of Mexico*

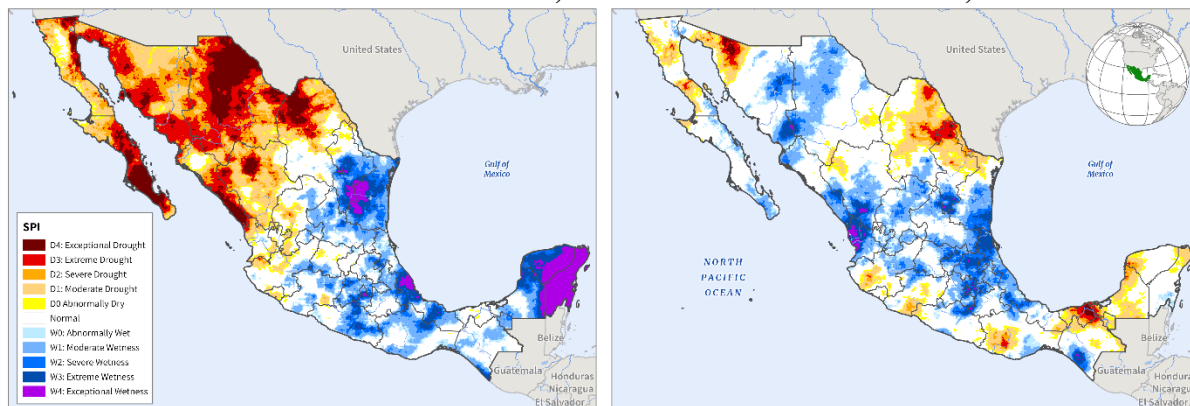
In the state of Mexico, the harvest is 95 percent complete and expected to end in February 2025. Estimated yield for rainfed corn is 3.5 MT/ha. Harvested area is estimated to decrease 10 percent to 415,000 ha, due to farmers' high debt levels.

### *Other States*

In Veracruz, harvest is virtually complete and planted area increased by over 4 percent annually due to higher-than-average precipitation across the state. Average yield for rainfed corn is estimated at 2.5 MT/ha. To support smallholder farmers, the government of Veracruz announced a subsidy of 1,000 pesos (USD 56) per MT of corn in addition to the guarantee purchase price provided by SEGALMEX (the Mexican Food Security Agency). The state government aims to offset a significant drop in the crop's price.

In Chiapas, harvested area and production are estimated stable at 500,000 HA and 1.1 MMT. Estimated average yields are expected to be 2.2 MT/ha. In Oaxaca, harvested area and production are estimated slightly lower at 435,000 ha and 590,000 MT. Corn farmers in both Oaxaca and Chiapas are mostly smallholder farmers and plant rainfed local corn varieties. These producers largely rely on government support programs, remittances, and additional income from non-agricultural activities and production is mostly used for household consumption.

**Figure 3. Mexico: Standardized Precipitation Index (SPI)  
June 1 to November 30, 2024 vs. June 1 to November 30, 2025**



Source: USDA International Production Assessment Division

Mexico’s Secretariat of Agriculture (SADER) maintained priority programs focused on smallholder and subsistence producers, with limited impact on overall corn production growth. These programs remain largely decoupled from commercial-scale production and do not significantly influence national supply trends. [The 2026 Production for Wellbeing \(\*Produccion para el Bienestar\*\) Program](#) continued to target small-scale farmers cultivating rainfed corn on up to 8.0 ha and irrigated corn on up to 5.0 ha corn, as well as other priority crops. The program provides a one-time cash transfer per producer along with technical assistance for agroecological and sustainable practices. In addition, [the 2026 Government Procurement \(\*Acopio para el Bienestar\*\) Program](#), previously known as Price Guarantee Program for Basic Food Products, delivers support directly to small producers (planted area of up to 5.0 ha) through purchases of corn at a set purchase price. Through this program, Food Security Mexico (SEGALMEX) purchases up to 35.0 MT of white corn or 15.0 MT of native corn per producer at a guaranteed price higher than the commercial price. For the MY 2025/2026 spring/summer cycle, the government set a guaranteed price of 7,000 pesos per ton (USD 395), which is about 40 percent higher than the average price paid to commercial producers in the Bajío region in December 2025. SEGALMEX also provides additional support of 200 pesos (USD 11) for grain transportation from the field to collection centers. Despite substantial price incentives, these programs have a limited effect on planted area expansion or productivity gains as they primarily serve smallholder and subsistence farmers and exclude most commercial producers, who account for most corn output and rely on improved seeds and comprehensive technology packages.

In response to nationwide farmer demonstrations in October 2025, the federal government, through SADER, announced an enhanced price support program in late November for medium-scale corn producers in [Guanajuato, Jalisco, Michoacán and Querétaro](#). Through this program, SADER provides a cash incentive of 950 pesos (USD 53) per metric ton to corn producers selling between 5.1 and 20.0 hectares, with support capped at 200 metric tons per producer. State governments in these states supplement the federal incentive, resulting in combined support intended to complement the existing price guarantee mechanism. The program is designed to supplement farmer income amid persistently low corn prices and elevated domestic inventories, which have weakened farmgate

prices. However, farmer associations report that administrative requirements remain burdensome, limiting participation. In addition, market absorption remains constrained by high industry stock levels and a continued preference for lower-priced imported corn, reducing the program’s effectiveness.

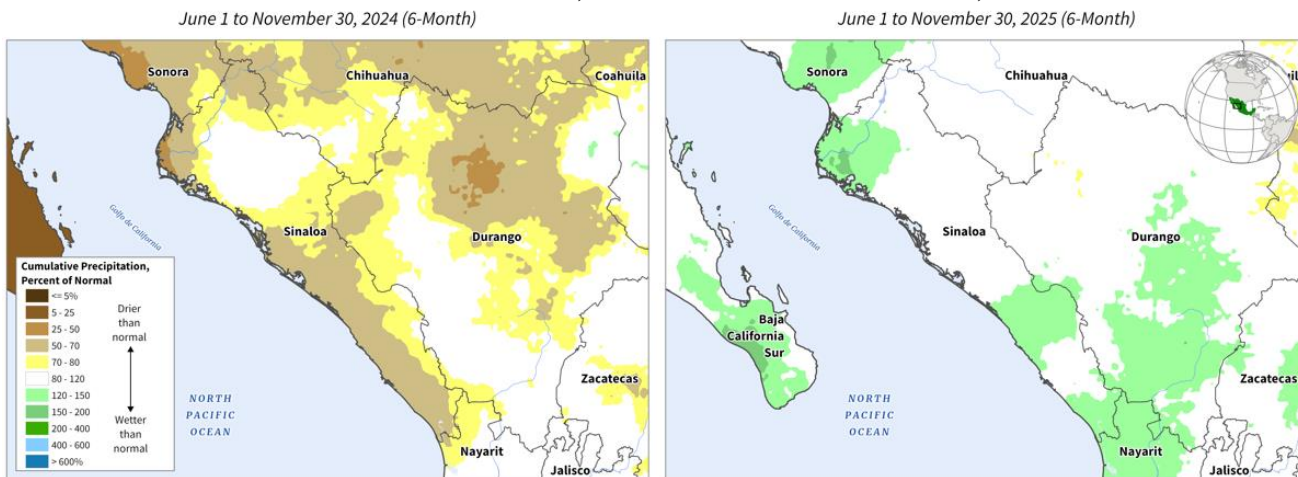
*Fall/Winter Corn*

MY 2025/2026 fall/winter corn planted area is forecast to increase 15 percent to 1.0 million ha, supported by improved water availability in Sinaloa's reservoirs. Production is forecast up 47 percent at 6.0 MMT based on Sinaloa’s average yields of approximately 12.5 MT/ha for irrigated production, which accounts for the majority of fall/winter crop.

In October 2025, Sinaloa's State Plant Health Committee (CESAVESIN) and Rural Development Council approved 469,069 ha of irrigated corn for MY 2025/2026, representing a 59 percent increase over the previous marketing year's authorization of 295,000 ha. Registered planted area qualifies producers for official water allocations and government support programs. As of January 16, 2026, Sinaloa's Agricultural Validation and Monitoring System (SIVASA) reported 310,881 ha of white corn planted, substantially higher than the 160,304 ha planted by the same date in MY 2024/2025. Actual planted area typically exceeds reported figures, as some producers irrigate using private wells or supplemental water from irrigation districts not immediately reflected in official registries. However, total planted area is forecast to remain below the authorized ceiling due to elevated producer debt levels constraining full utilization of approved acreage.

As of January 7, 2026, Sinaloa's reservoir storage stood at 34 percent of capacity, compared to 25 percent in January 2025. The state's three largest dams—accounting for 50 percent of total storage—averaged 26 percent of capacity. CONAGUA reported precipitation during the 2025 rainy season (June-November) totaled 868.6 mm, 62 percent above the prior year and closer to the historical average. Despite this improvement, reservoir levels remain below average following consecutive years of drought.

**Figure 4. Sinaloa’s Percent of Cumulative Precipitation  
June 1 – November 30, 2024 vs. June 1 – November 30, 2025**



Source: USDA International Production Assessment Division

In Veracruz, farmers had planted 89,628 ha of corn as of November 30, 2025, for the fall/winter cycle. Total planted area for the cycle is forecast to remain stable at approximately 200,000 ha, supported by steady prices for white corn in southern regional markets. Between 2020 and 2024, Veracruz produced an average of 506,138 MT of corn during the fall/winter cycle, representing approximately 6 percent of national fall/winter production.

Approximately 98 percent of winter corn in Veracruz is rainfed and produced primarily by small and medium-scale farmers.

#### *MY 2024/2025*

Total corn production for MY 2024/2025 is estimated at 23.3 MMT, 2 percent lower year-on-year. The marketing year consists of spring/summer cycle production (final) and fall/winter cycle production (preliminary).

#### *Spring/Summer Corn*

According to SIAP, final spring/summer cycle increased by 3 percent to 19.2 MMT based on favorable weather conditions and higher-than-average precipitation in key growing regions.

Harvested area increased by 9 percent to 5.8 million ha. However, average yields declined 5 percent due to irregular rainfall patterns, elevated temperatures, and reduced water availability in major producing states including Chihuahua, Michoacán, and Guanajuato. By type, the cycle produced 16.5 MMT of white corn (up 4 percent) and 2.7 MMT of yellow corn (down 5 percent). Yellow corn production declined as producers reduced planted area in response to more favorable white corn prices and lower water availability, particularly in Chihuahua.

#### *Fall/Winter Corn*

The fall/winter corn harvest concluded in late August with estimated production down 20 percent to 4.1 MMT, driven by drought and limited irrigation in Sinaloa, the leading producer. Harvested area declined 3 percent to 867,821 ha, while average yields fell 18 percent to 4.71 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 16 percent to 10.2 MT/ha. While grain quality was good, kernel sizes were below average. About 0.2 MMT was harvested for silage.

## **Trade**

### *Imports*

Post forecasts MY 2025/2026 corn imports slightly higher at 26.0 MMT, supported by continued growth in feed demand from Mexico's expanding livestock sector. Despite higher domestic white corn production, feed manufacturers and livestock producers continue to prefer yellow corn due to its higher metabolizable energy content, competitive pricing, consistent year-round supply, and established logistics infrastructure.

Mexico's MY 2024/2025 corn imports reached a record 25.9 MMT, up 12 percent year-on-year, driven by below-average domestic production and growing livestock sector demand. The United States supplied over 99 percent of total imports. Yellow corn represents approximately 97 percent of total imports. About 60 percent arrives via rail shuttle trains delivering to terminals throughout Mexico, with Nuevo Laredo, Piedras Negras, and Ciudad Juárez accounting for roughly 80 percent of rail volumes. White corn imports surged to 799,100 MT (up 288 percent), nearly all from the United States, following [Mexico's February 2025 decree](#) reversing restrictions on GE corn that the United States had challenged under the USMCA. U.S. white corn is consumed primarily in northeastern, southeastern, and Yucatán regions due to logistical advantages.

## Exports

In MY 2025/2026, Post forecasts Mexico’s corn exports 20 percent higher to 30,000 MT on higher domestic production and strong demand, particularly for the restaurant and retail industries. In MY 2024/2025, Mexico’s corn exports are estimated 9 percent up at 25,000 MT. Roughly 53 percent of Mexico’s corn exports were shipped to United States. Estimated exports are significantly lower than the 10-year average due to lower-than-average white corn production, lower ending stocks, and the ban on GE corn use for the tortilla and *masa* sectors that maintained a strong demand for domestic white corn and reduced exportable supplies.

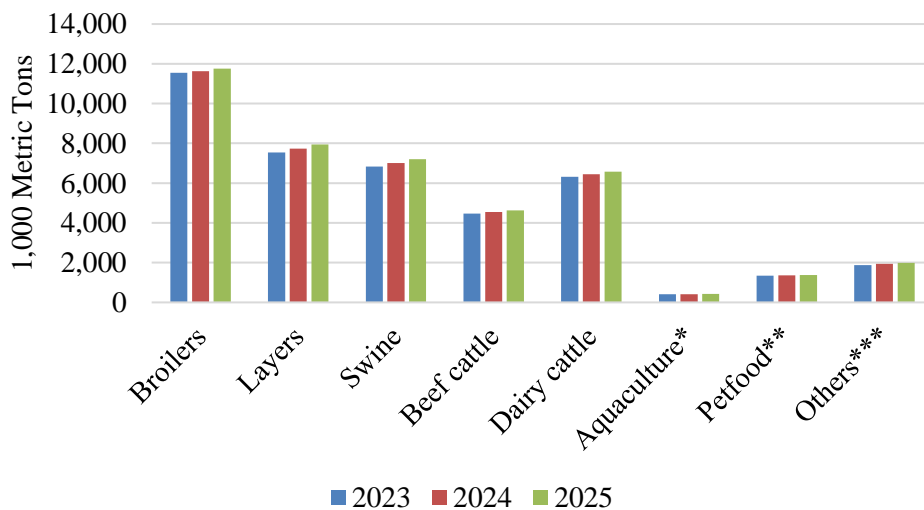
## Consumption

Total consumption in MY 2025/2026 is forecast to increase by 4 percent to 51.3 MMT, driven by increased demand for yellow corn from the animal feed and livestock sectors. Yellow corn accounts for over 60 percent of total consumption, used primarily in animal feed, with the remainder consisting of white corn for human consumption (tortillas, masa products), corn starch production, and other industrial uses.

Consumption in MY 2024/2025 is estimated to increase by 4 percent to 49.1 MMT, reflecting continued growth in feed demand and livestock production, particularly in the poultry sector. Corn—predominantly yellow corn—remains the primary feed ingredient, accounting for approximately 45 percent of total feed rations.

The National Feed Industry Association, also called CONAFAB, reports compound feed production growth across all livestock sectors in 2025, led by broiler (11.8 MMT), layer hen (8.0 MMT), and swine (7.2 MMT) segments. Vertically integrated operations produce 61 percent of total feed, with the beef cattle sector showing the highest integration rate (74.5 percent). Vertically integrated operations produce approximately 61 percent of total feed, with independent commercial mills accounting for the remaining 39 percent. Integration rates vary significantly by sector, with beef cattle operations showing the highest vertical integration (74.5 percent) and dairy operations the lowest (54.1 percent). Livestock production growth is supported by rising per-capita animal protein consumption. COMECARNE estimates 2025 per-capita consumption increased 3.9 percent for poultry (39 kg), 4.0 percent for eggs (24 kg), and 3.3 percent for beef (17 kg) and pork (14 kg).

**Figure 5. Animal Feed Consumption by Livestock Sector**



Source: CONAFAB

\*Includes shrimp and fish feed

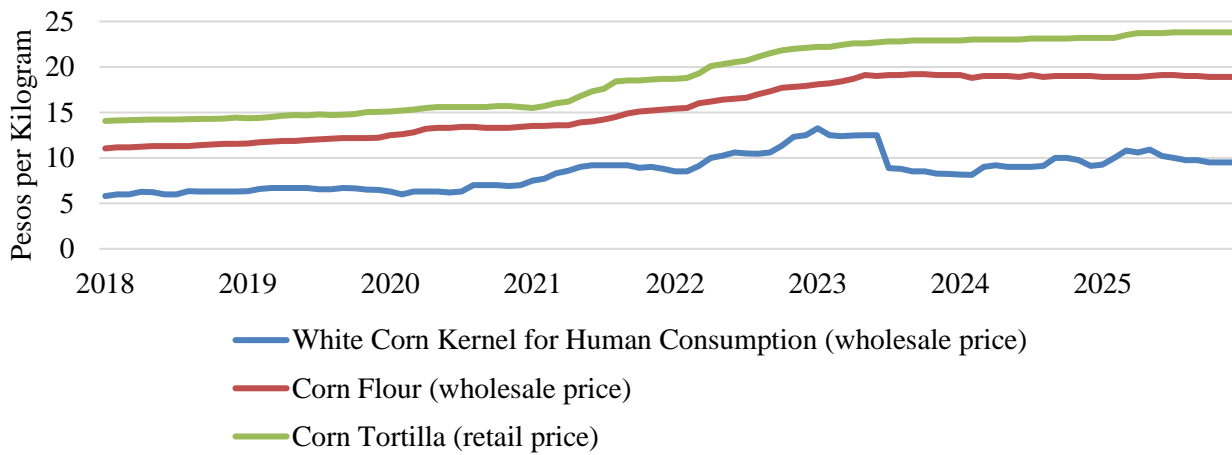
\*\* Includes dog and cat food

\*\*\* Includes feeds for horses, rabbits, fighting cocks, sheep, goats, etc.

Traditional tortilla shop prices increased 2.4 percent in 2025, well below Mexico's 3.7 percent headline inflation rate. Price stability reflected adequate industrial corn flour supplies driven by higher white corn imports, which kept wholesale flour prices stable throughout the year.

Wholesale prices for domestic white corn kernels increased approximately 9 percent year-on-year, reflecting tighter supplies from lower Sinaloa production. This primarily affected traditional processors using direct kernel nixtamalization rather than industrial flour manufacturers relying on imports. Industrial corn flour demand continues to expand, supported by growing consumption of corn-based snack foods.

**Figure 6. Average Nationwide Prices of White Corn, Corn Flour, and Corn Tortilla**



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

**Stocks**

Corn ending stocks in MY 2025/2026 are forecast to increase by 13 percent to 6.6 MMT, driven by higher expected domestic production and limited use of white corn amid elevated import volumes. Corn stocks are held by millers, farmers, grain traders, and warehouse operators. As of January 2026, an estimated 100,000 MT of white corn from MY 2024/2025 remained in warehouses in Sinaloa, as farmers continued to hold inventories in anticipation of improved prices. In addition, most commercial corn harvested during the spring/summer MY 2025/2026 remained in collection centers (*centros de acopio*) and other storage facilities, as producers delayed sales in response to declining market prices.

In MY 2024/2025, ending stocks are estimated slightly higher at 5.9 MMT, reflecting increased import volumes of yellow and white corn.

## WHEAT

**Table 3. Mexico, Wheat Production, Supply and Distribution**

Wheat Market Year Begins	2023/2024		2024/2025		2025/2026	
	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	855	755
Production (1000 MT)	3476	3476	2648	2648	1750	1750
MY Imports (1000 MT)	5292	5292	5567	5567	6700	6700
Total Supply (1000 MT)	9525	9525	8990	8990	9305	9205
MY Exports (1000 MT)	850	850	135	135	100	100
Feed and Residual (1000 MT)	200	200	300	300	350	350
FSI Consumption (1000 MT)	7700	7700	7700	7800	8000	7900
Total Consumption (1000 MT)	7900	7900	8000	8100	8350	8250
Ending Stocks (1000 MT)	775	775	855	755	855	855
Total Distribution (1000 MT)	9525	9525	8990	8990	9305	9205
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 7. Wheat Crop Calendar  
Mexico Wheat**



### 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 the fall/winter wheat fully harvested in August 2025 and the spring/summer wheat to be fully harvested in January 2026. 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

According to preliminary SIAP data, wheat production in the fall/winter cycle decreased 35 percent annually to 1.66 MMT while harvested area went down by 36 percent to 266,434 ha due to prolonged drought conditions and lower water availability in Sonora and Sinaloa, major producing states.

#### Sonora

Estimated production in Sonora decreased by 73 percent year-on-year to 422,420 MT due to record-low reservoir levels and restricted water permits for irrigation. In southern Sonora, production in the Yaqui River district fell 77 percent to 173,364 MT, while Mayo Valley's output declined 62 percent to 206,675 MT. Bread wheat represented

53 percent of output and durum wheat represented 47 percent of output. While farmers in Sonora historically produced mostly durum wheat, limited water availability and government support to bread wheat prompted some farmers to switch from durum to bread wheat.

### *Guanajuato*

Estimated production in Guanajuato increased 116 percent to 408,576 MT, while harvested area rose to 59,542 ha, mostly bread wheat. Farmers expanded wheat production due to improved water availability (particularly in Irrigation district 011 in the Santiago Valley), increased availability of improved seeds, higher price expectations compared to barley, and expected government support for bread wheat. Government support under the [2025 Guaranteed Prices Program](#) targeted producers with up to 300 MT of bread wheat. The program established a guaranteed price of 7,050 pesos (USD 390) per MT for wheat, more than 40 percent above the average farmgate price of 5,000 pesos (USD 278). In previous months, farmer associations indicated that delayed payments—worth over 2,000 pesos (USD 108) per MT—has directly affected farm incomes and discouraged wheat planting in future cycles.

### *Sinaloa*

In Sinaloa, estimated production decreased by 5 percent to 192,382 MT due to lower water availability for irrigation. Average yields dropped 3 percent to 6.30 MT/ha. Roughly 97 percent of production referred to bread wheat and 3 percent to durum wheat.

### *Other States*

In Baja California, production decreased 3 percent to 201,779 MT on a smaller planted area of 30,632 ha (21,000 ha durum; 9,632 ha bread wheat). Average yields increased 5 percent to 6.64 MT/ha due to improved agronomical management, particularly in the Mexicali Valley. In Chihuahua, wheat production fell 35 percent to 98,173 MT due to limited water availability due to severe drought conditions. Yields declined 7 percent to 6.0 MT/ha. In Michoacán, production increased 28 percent to 151,884 MT, supported by higher water availability for irrigation.

### *Spring/Summer Wheat*

MY 2025/2026 spring/summer wheat planted area is estimated to decline 20 percent to 41,400 ha based on lower price expectations, with harvest virtually complete by late January 2026. Final production is estimated at 91,000 MT. Tlaxcala, accounting for 29 percent of national area, saw the largest decline with plantings down 42 percent to 11,826 ha.

### *MY 2026/2027*

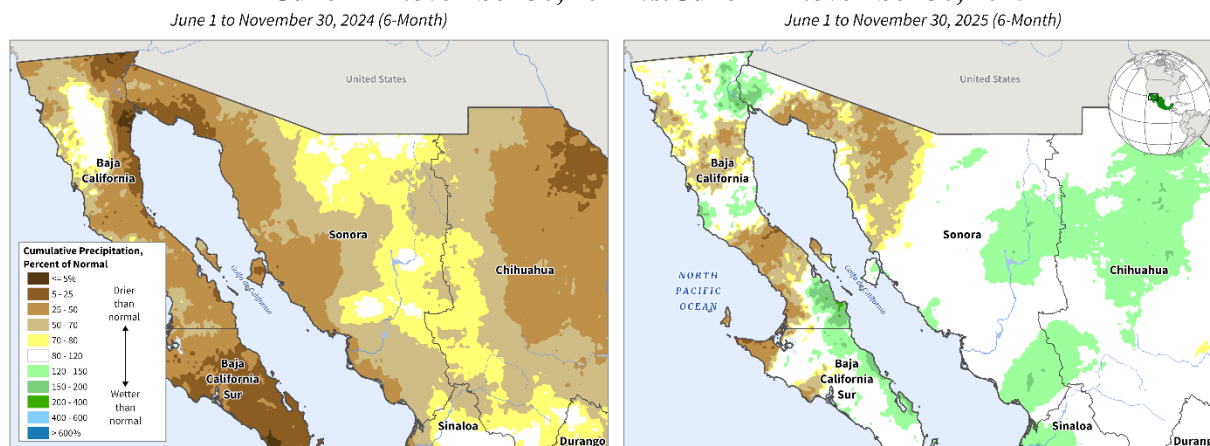
#### *Fall/Winter Wheat*

### *Sonora*

In October 2025, Sonora state authorities increased authorized planted area by 118 percent in the MY 2026/2027 fall/winter cycle for irrigated wheat to 130,000 ha, driven by higher precipitation and dam levels. As of January, authorities of irrigation districts of Mayo and Yaqui, key producing regions, reported that 106,279 ha of wheat was planted (64,429 ha of durum wheat and 41,850 ha of bread wheat). As of January 15, the state-level reservoirs for irrigated agriculture were at 32.5 percent of capacity, 16 percent higher than the previous year.

CONAGUA reported that in 2025 during the rainy season, from May through November, accumulated precipitation in Sonora increased by 83 percent annually to 440 mm. In November 2025, [SADER announced a program](#) targeted at farmers in Sonora of up to 50 ha that switched from wheat to safflower and barley to provide cash support of up to 5,000 pesos (est. USD 278) per ha to buy improved seeds. However, wheat remains the main crop in Sonora with a high economic impact in the region, and most farmers are resistant to switching their cropland without a comprehensive government support program, including guaranteed prices and contract agriculture.

**Figure 8. Sonora: Percent of Normal Cumulative Precipitation  
June 1 – November 30, 2024 vs. June 1 – November 30, 2025**



Source: USDA International Production Assessment Division

### Other States

In Sinaloa, as of January, authorized planted area for wheat increased by 53 percent to 45,493 ha (43,982 ha for bread wheat and 1,511 ha for durum wheat) based on a recovery of reservoir levels. The approved area is 18 percent higher than the 5-year average. In Baja California, authorized planted area increased 7 percent to 32,891 ha, among which 21,954 ha in Mexicali Valley. In Guanajuato, farmer associations discouraged wheat planting due to low prices and delayed government support and planted area is expected to decrease from the previous year. In Michoacán, farmers are expected to maintain a stable planted area at roughly 26,000 ha.

### Trade

In MY 2025/2026 (July – June), wheat imports are estimated to increase by 20 percent to 6.7 MMT based on lower domestic production. From July through October 2025, Mexico imported 2.2 MMT of wheat, 12 percent higher than the previous year. Roughly 80 percent of total imports correspond to U.S. wheat (Hard Red Winter, Hard Red Spring and Soft Red Spring), a 11 percent growth from the previous year. In the same period, Canadian wheat made up 19 percent, and other countries roughly 1 percent of imports.

Wheat imports in MY 2024/2025 are estimated 5 percent higher at 5.6 MMT, supported by lower domestic production and increasing 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 9 percent), and 96,000 MT from Argentina and other sources. U.S. wheat remained competitive due to higher

exportable supplies and reliable rail logistics. About 71 percent of imports arrived by rail—mainly via Ciudad Juárez and Piedras Negras—and 29 percent by vessel, primarily through Veracruz.

## **Consumption**

Wheat consumption in MY 2025/2026 is forecast to increase 3 percent to 8.3 MMT, supported by population growth. In addition, projected growth in tourism is 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 3 percent to 8.1 MMT, primarily driven by population growth and higher bread demand. In 2025, Mexico's wheat milling capacity was 11.2 MMT across 95 mills. The Central and Bajío regions account for 54 percent of capacity, followed by the north (15 percent), northwest (12 percent), and south–southeast (19 percent). As of October 2025, the milling sector utilized 61 percent of available capacity, processing 7.4 MMT of wheat into 5.5 MMT of wheat flour and semolina.

## **Stocks**

Ending stocks in MY 2025/2026 are projected to increase by 12 percent to 855,000 MT, supported by higher import volumes and inventory accumulation by millers seeking to offset reduced domestic supplies and mitigate supply risk. Ample importable supplies and competitive prices are expected to facilitate stock building. Commercial traders and millers typically maintain wheat stocks in storage facilities and warehouses.

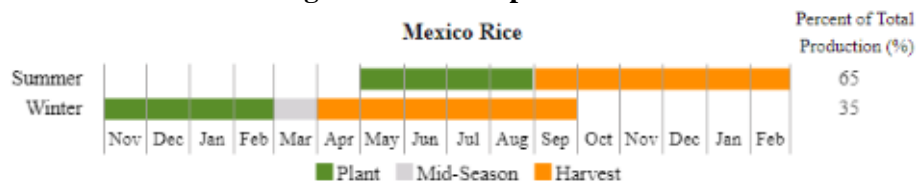
For MY 2024/2025, ending stocks are estimated 3 percent lower at 755,000 MT based on higher use of supplies due to lower production.

## RICE

**Table 4. Mexico, Rice Production, Supply and Distribution**

Rice, Milled Market Year Begins Mexico	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	31	31	36	36	37	40
Beginning Stocks (1000 MT)	120	120	116	116	147	139
Milled Production (1000 MT)	153	153	170	162	177	189
Rough Production (1000 MT)	223	223	247	236	258	275
Milling Rate (.9999) (1000 MT)	6870	6870	6870	6870	6870	6870
MY Imports (1000 MT)	851	851	893	893	895	895
Total Supply (1000 MT)	1124	1124	1179	1171	1219	1223
MY Exports (1000 MT)	18	18	27	27	5	20
Consumption and Residual (1000 MT)	990	990	1005	1005	1020	1020
Ending Stocks (1000 MT)	116	116	147	139	194	183
Total Distribution (1000 MT)	1124	1124	1179	1171	1219	1223
Yield (Rough) (MT/HA)	7.1935	7.1935	6.8611	6.5556	6.973	6.875
(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 9. Rice Crop Calendar**



### Production

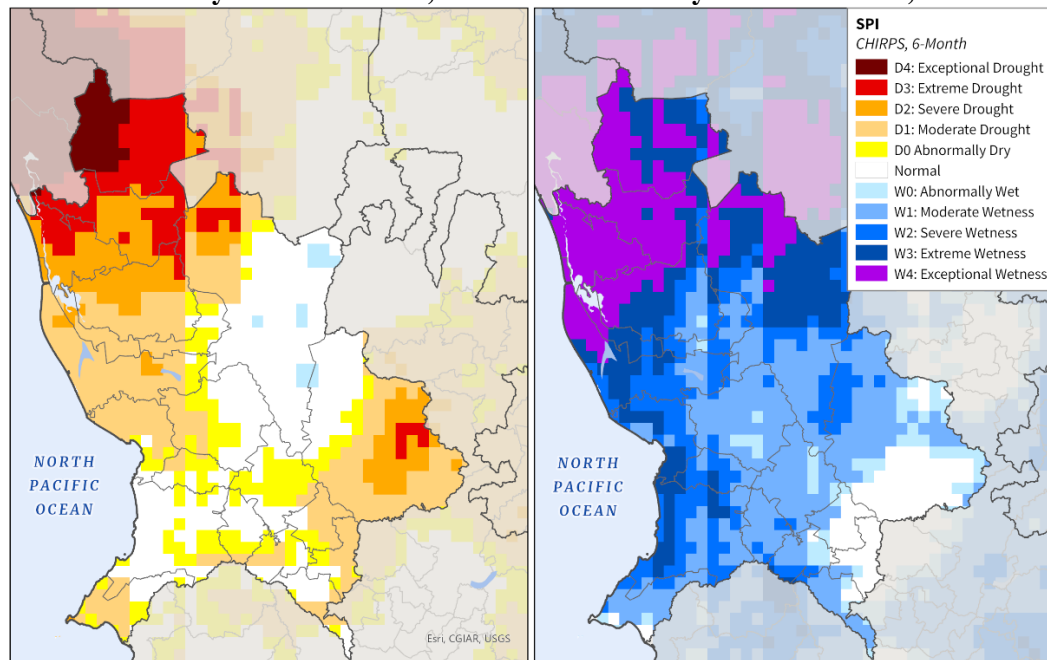
#### MY 2025/2026

Rice production in MY 2025/2026 (October – September) is forecast to increase 17 percent to 275,000 MT, equivalent to 189,000 MT of milled rice. Harvested area is expected to rise 11 percent to 40,000 ha. The increase is a result of strong demand for domestic paddy rice. Despite the projected output growth, production is expected to remain below 20 percent of total domestic use.

#### Spring/Summer Rice

MY 2025/2026 spring/summer rice planted area is estimated to increase 19 percent to 27,347 ha based on improved financing mechanisms and favorable weather conditions, with harvest virtually complete by late January 2026. Final production is estimated at 180,000 MT. Campeche, accounting for approximately 37 of national area, recorded the largest increase with plantings up 223 percent to 10,087 ha, driven by expanded local credit access in the Holpechén and Champotón lowlands. Nayarit planted area increased 8 percent to 5,616 ha, supported by higher precipitation in Santiago Ixcuintla municipality.

**Figure 10. Nayarit, Mexico: Standardized Precipitation Index  
May 1 to October 31, 2024 May 1 to October 31, 2025**



*Source: International Production Assessment Division*

On November 14, 2025, the Government of Mexico [launched the Plan Campeche](#), an agricultural support program aimed at expanding domestic paddy rice production through targeted assistance to 301 small-scale producers in Campeche at the initial stage. The program provides direct payments, free fertilizer, certified seed, specialized technical assistance, rehabilitation of key irrigation districts, and access to shared machinery, with the objective of improving yields, lowering production costs, and reducing climate-related risks. The plan is projected to increase Campeche’s output to 100,000 MT of paddy rice yearly (from 28,241 MT in MY 2024/2025) and reduce dependency on imports.

#### *Fall/Winter Rice*

MY 2025/2026 fall/winter rice planting is virtually complete in Campeche, Jalisco, and Nayarit, with planting expected to conclude by February 2026 in Tamaulipas and Michoacán. Planted area is forecast at approximately 13,000 ha. Tamaulipas authorized 3,000 ha with planting beginning in January, while Michoacán is expected to plant roughly 1,000 ha. As of November 30, 2025, SIAP reported 462 ha planted in Campeche and Michoacán combined.

#### *MY 2024/2025*

Rice production in MY 2024/2025 is forecast up 6 percent to 236,000 MT (162,000 MT milled), driven by greater water availability in Tamaulipas and higher use of 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 final SIAP data, production decreased 2 percent to 150,720 MT, due to lower planted area in Nayarit, 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*

According to SIAP preliminary data, production of the fall/winter cycle increased 20 percent to 84,330 MT, driven by improved irrigation water availability and solid demand for domestic rice. In Campeche, production rose 47 percent to 15,025 MT based on increased improved seed and financial mechanisms availability. In Tamaulipas, production reached 15,062 MT, after a year of no planting due to low water availability, supported by water permits and state government support, including access to precision seed drills and diesel subsidies. In Nayarit, production is estimated 11 percent lower at 44,869 MT due to lower yields.

## **Trade**

### *MY 2025/2026*

Rice imports in MY 2025/2026 (October – September) are forecast to increase by 2 percent to 895,000 MT, driven by growing 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. The 2026 Anti-Inflation Decree removed paddy rice from the program. However, [a January 5, 2026 administrative act](#) approved by the Secretary of Economy set a maximum quota of 200,000 MT for duty-free imports of paddy rice from Brazil and other non-free trade agreement (FTA) countries. Imports above the quota are subject to applicable most favored nation (MFN) tariffs. The quota exceeds Brazilian paddy rice imports in 2025, which totaled 161,962 MT, likely allowing Brazilian rice to remain competitive.

### *MY 2024/2025*

#### *Imports*

Rice imports in MY 2024/2025 are estimated to increase by 5 percent to 893,000 MT, based on preliminary trade data. Paddy rice accounted for 71 percent and milled rice for 29 percent. During this period, the overall U.S. market share declined from 80 to 55 percent, primarily in paddy rice. In contrast, Uruguay expanded its share from five to 26 percent. Brazil increased its share from 0.1 to 9 percent, while Thailand's market share fell from 13 to 5 percent (exclusively milled rice). Industry sources attribute South America's increased competitiveness due to abundant exportable supplies and prices.

#### *Paddy Rice*

Paddy rice imports rose 13 percent to 652,833 MT. The U.S. market share declined from 100 percent to 62 percent, with Uruguay accounting for 23 percent, Brazil 10 percent, and Paraguay 5 percent. In September 2025, Uruguayan paddy rice was priced approximately 18 percent below U.S. rice on average at FOB USD 338 per MT. 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 11 percent to 216,728 MT. The U.S. market share edged down from 34 to 33 percent, while Uruguay increased from 19 to 36 percent. Thailand's share declined from 47 to 22 percent, and Brazil rose from 0.4 to 8 percent. Other suppliers contributed 1 percent. 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.

### *Exports*

Rice exports in MY 2024/2025 are estimated 50 percent higher at 27,000 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 1 percent to 1.02 MMT, reflecting population growth. For MY 2024/2025, rice consumption is estimated to rise 2 percent to 1.0 MMT. The Mexican Rice Council estimates per capita consumption at 7.0 kilograms (15.4 pounds).

### **Stocks**

Ending stocks in MY 2025/2026 are forecast to increase 34 percent to 171,000 MT, reflecting higher import volumes and a deliberate inventory-building strategy by domestic millers. Adequate international supplies and competitive prices are expected to encourage millers to maintain larger carryover stocks to ensure uninterrupted supply and meet anticipated growth in domestic demand. Rice stocks are typically held by millers and commercial traders.

For MY 2024/2025, ending stocks are estimated 9 percent higher at 127,000 MT, as domestic millers take advantage of lower international rice prices to replenish and build inventories.

## SORGHUM

**Table 5. Mexico, Sorghum Production, Supply and Distribution**

Sorghum	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Market Year Begins						
Mexico						
Area Harvested (1000 HA)	1295	1295	1200	1200	1240	1220
Beginning Stocks (1000 MT)	270	270	269	269	293	253
Production (1000 MT)	4540	4540	4200	4160	4300	4250
MY Imports (1000 MT)	60	60	525	525	600	600
Total Supply (1000 MT)	4870	4870	4994	4954	5193	5103
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	293	253	292	302
Total Distribution (1000 MT)	4870	4870	4994	4954	5193	5103
Yield (MT/HA)	3.5058	3.5058	3.5	3.4667	3.4677	3.4836

(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 11. Mexico Sorghum Crop Calendar**



### Production

#### MY 2025/2026

Sorghum production in MY 2025/2026 (October – September) is forecast 2 percent higher at 4.3 MMT based on a limited recovery from prolonged drought. Estimated production is the second lowest in more than 30 years. Harvested area is projected to grow 2 percent to 1.2 million ha.

#### Spring/Summer Sorghum

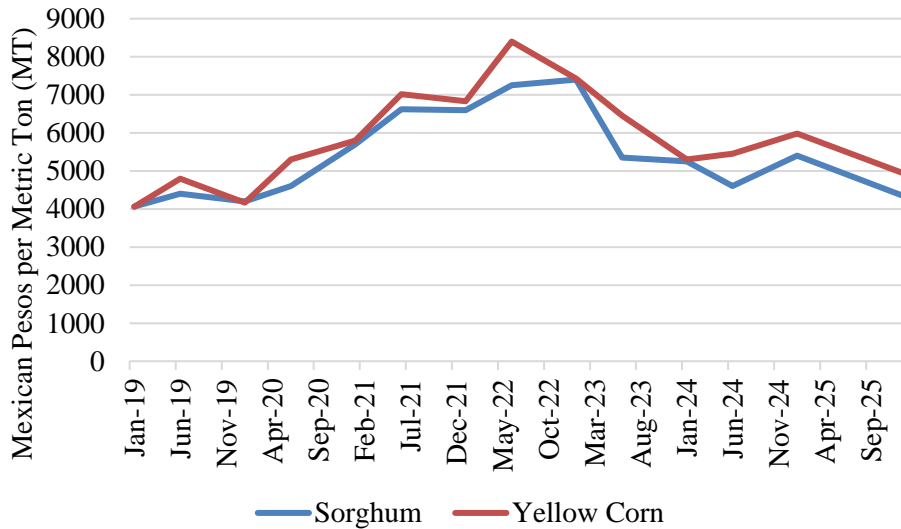
MY 2025/2026 spring/summer sorghum planted area increased 5 percent to 432,612 ha based on a return to average precipitation levels in Tamaulipas and Sinaloa, with harvest expected to conclude by February 2026. Average yields are estimated at 6.3 MT/ha, with total production forecast at 2.6 MMT.

Tamaulipas recorded the largest area increase, up 59 percent to 102,965 ha, concentrated in González municipality. Sinaloa planted area increased 81 percent to 20,036 ha with production estimated at 20,000 MT. In contrast, Guanajuato area declined 8 percent to 127,816 ha as high debt levels, elevated input costs, and market prices below profitability thresholds led producers to reduce plantings on rented land and shift to alternative crops including corn and forage varieties.

### Fall/Winter Sorghum

Fall/winter sorghum planting is expected to conclude in late March. As of November 30, 2025, planted area nationwide reached 56,437 ha. Official planting season for sorghum in Tamaulipas, the main sorghum-producing state, is from January 1 to March 8, 2026. Farmer associations assert that producers seek to maintain planted area around 650,000 ha across the state if moisture and precipitation levels are adequate during the planting season. However, estimated planted area is 25 percent lower than the 5-year average due high farmer debt and sorghum’s persistently low prices.

**Figure 12. Delivered Price for Sorghum and Yellow Corn in Jalisco**



Source: SNIIM

### MY 2024/2025

Sorghum production in MY 2024/2025 is estimated to decrease 8 percent to 4.2 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 ha, while yields increased 2 percent to 4.94 MT/ha. In Guanajuato, production declined 6 percent to 868,452 MT due to reduced planting from higher input costs—including diesel, seed, and labor—and lower crop prices. In Tamaulipas, production increased 64 percent to 172,816 MT and average yield at 2.7 MT/ha. based on local government support. In Michoacán, production remained stable at 280,229 MT with average yields at 4.8 MT/ha. During the peak harvest in November 2024, the farmgate sorghum price was 3 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 9 percent to 793,777 ha. The harvest was completed in late August, with production estimated 13 percent lower at 2.13 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 4 percent to 2.48 MT/ha. Approximately 70 percent of the state’s sorghum area is rainfed and 30 percent irrigated.

## **Trade**

Sorghum imports for MY 2025/2026 are forecast to increase by 14 percent to 600,000 MT, driven by U.S. sorghum’s competitive prices.

Sorghum imports in MY 2024/2025 are estimated to surge 775 percent to 520,000 MT due to reduced domestic production and attractive import prices. 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.

## **Consumption**

Total sorghum consumption in MY 2025/2026 is forecast to increase 2 percent to 4.8 MMT, primarily due to increased demand in the local feed and livestock industries. 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 2 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, the Bajío and the Gulf regions.

## **Stocks**

Ending stocks in MY 2025/2026 are forecast to increase by 19 percent to 302,000 MT, reflecting higher domestic production combined with importable supplies and a slower pace of market absorption. Favorable production conditions are expected to increase availability, while price uncertainty and adequate supply levels may encourage inventory accumulation by producers and commercial holders, contributing to higher carryover stocks.

Ending stocks in MY 2024/2025 are estimated 6 percent lower at 253,000 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)

### Mexico's 2026 Budget Prioritizes Social Assistance

On November 21, 2025, President Claudia Sheinbaum published the 2026 economic package approved by the Congress. The package reports a 5.8 percent real increase in federal spending, prioritizing social programs, debt servicing, and pensions. SADER is allocated USD 4.1 billion, a 2 percent nominal increase but a 2 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. (See Gain Report [MX2025-0063](#))

### New General Law on Water

On December 11, 2025, [the reforms to the 1992 National Water Law \(LAN\) and the new General Water Law \(LGA\)](#) were published on the National Gazette. According to the National Water Commission (CONAGUA), the agricultural sector consumes an estimated 76 percent of total domestic water demand. The reforms aim to shift water management from private control to public stewardship by strengthening CONAGUA's authority over water concessions and irrigation districts. The legislation establishes a concession reassignment mechanism under which the Mexican authority may redistribute volumes when they are not used in accordance with the concession title, when hoarding occurs, or when resource availability is affected. Farmers remain attentive to the legislation implementation that is likely to influence irrigated crop planting in some regions.

### 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, 2026. Long grain paddy rice (HS code:1006.10.99) was removed from the program. In addition, a January 5, 2026 [agreement](#) by the Secretariat of Economy sets a maximum quota of 200,000 MT for duty-free imports from Brazil and other non-FTA countries. 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](#))

Code	Product	Tariff	Notes
<b>10.01</b>	<b>Wheat and meslin.</b>		
1001.11.01	For sowing.	Ex.	
1001.19.99	Others.	Ex.	
1001.91.99	Others.	Ex.	
1001.99.99	Others.	Ex.	
<b>11.01</b>	<b>Wheat or meslin flour</b>		
<b>1101.00.01</b>	Wheat or meslin flour	Ex.	
<b>10.05</b>	<b>Corn.</b>		
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.
<b>10.07</b>	<b>Grain sorghum (graniferous).</b>		
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.
<b>11.01</b>	<b>Wheat or meslin flour (tranquillón)</b>	Ex.	
<b>11.02</b>	<b>Cereal flour, except wheat or meslin.</b>		
1102.20.01	Cornmeal.	Ex.	
<b>19.02</b>	<b>Pasta, whether cooked or stuffed (with meat or other substances) or otherwise prepared, such as spaghetti, noodles, macaroni, noodles, lasagna, gnocchi, ravioli, cannelloni;</b>		
1902.11.01	They contain eggs.	Ex.	
1902.19.99	The others.	Ex.	
1902.30.91	Other pasta	Ex.	
<b>19.05</b>	<b>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.</b>		
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](http://www.fas.usda.gov) for a complete selection of FAS worldwide agricultural reporting.

Report Number	Title	Dated
<a href="#">MX2025-0048</a>	Grain and Feed Update	09/22/2025
<a href="#">MX2025-0030</a>	Grain and Feed Update	06/23/2025
<a href="#">MX2025-0013</a>	Grain and Feed Annual	03/21/2025
<a href="#">MX2025-0003</a>	Grain and Feed Update	01/23/2025
<a href="#">MX2024-0044</a>	Grain and Feed Update	09/24/2024

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