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Report Highlights:

Mexico is the world's sixth-largest producer of chicken meat and robust domestic demand is projected to boost production and imports in 2025. High beef and pork prices position chicken meat as the more affordable meat choice. The United States is expected to remain Mexico's top poultry supplier due to established supply chains and geographical proximity.

Executive Summary

Mexico's economic outlook for 2025 presents a mixed picture. Gross domestic product (GDP) growth is expected to be modest, while inflation is anticipated to gradually decrease throughout 2025 and early 2026. Population growth, rising disposable incomes, and growing demand from tourism and restaurants are expected to drive consumption of both domestic and imported chicken meat. Chicken meat's affordability relative to other proteins is expected to be key driver of increased demand.

Production

Chicken meat production is forecast to rise two percent in 2025 to 4.1 million metric tons (MMT). Strong demand driven by population growth and sustained consumption from the Hotel, Restaurant, and Institutional (HRI) sector is expected to drive an increase in chicken meat production.

Consumption

Poultry consumption is forecast to rise three percent in 2025 to 5.1 MMT. Consumption per capita is expected to rise two percent as chicken meat is expected to remain the most affordable meat in Mexico and prices of other proteins such as pork and beef are less competitive.

Trade

Poultry imports are forecast to rise four percent in 2025 to 1.0 MMT. Rising domestic consumption is anticipated to boost imports in 2025. Poultry exports will remain limited due trading partner sanitary standards and robust domestic demand for chicken which reduces the availability of product for export.

Note: The report forecast reflects animal disease policies/restrictions and trade policies in place as of March 3, 2025, and assumes their continuation.

Chicken Meat

Table 1: Chicken Meat – Production, Supply, and Distribution (PSD)

Meat, Chicken Market Year Begins Mexico	2023		2024		2025	
	Jan 2023		Jan 2024		Jan 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	3,888	3,888	3,985	3,990	4,085	4,085
Total Imports (1000 MT)	1,006	1,006	970	1,000	990	1,040
Total Supply (1000 MT)	4,894	4,894	4,955	4,990	5,075	5,125
Total Exports (1000 MT)	4	4	4	4	5	5
Human Consumption (1000 MT)	4,890	4,890	4,951	4,986	5,070	5,120
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	4,890	4,890	4,951	4,986	5,070	5,120
Total Use (1000 MT)	4,894	4,894	4,955	4,990	5,075	5,125
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	4,894	4,894	4,955	4,990	5,075	5,125

(1000 MT)

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Note: Not official USDA data.

Production

2025

Chicken meat production is forecast to rise two percent in 2025 to 4.1 MMT. Higher demand driven by population growth and household and HRI sector consumption is expected to increase chicken meat production. Mexico is the world’s sixth-largest producer of chicken meat, meeting around 80 percent of its domestic demand. National chicken meat production expanded by over 30 percent in the last ten years.

In 2024, increased investments in biosecurity and feed storage reduced hatchling mortality. According to industry, improved hatchling survival rates are expected to contribute to higher poultry production in 2025. Producers report that stable and relatively low input prices continue to support their decisions to expand production. Public insecurity such as through thefts and extorsions along the poultry production chain will likely continue to hamper the sector.

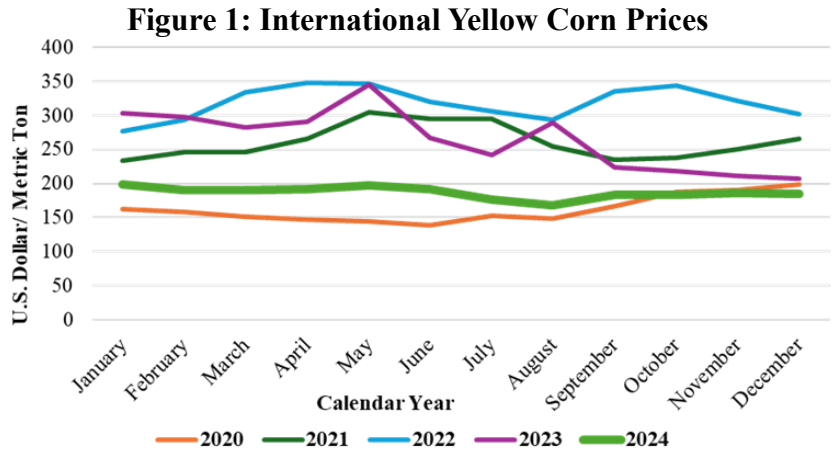
2024

Chicken meat production is estimated to rise three percent in 2024 to 4.0 MMT. Strong demand from both households and the HRI sector incentivized production. Reinforced biosecurity measures and low disease prevalence enabled increased production, especially from September to December 2024. Producers report a five percent increase in fertile egg production and a six percent reduction in mortality rates in 2024 compared to 2023.

Ample and cost-effective high-quality feed provided to grandparent stock enhanced flock health, improved feed conversion rates in broilers, and contributed to increased production.

Due to limited domestic corn production, the Mexican poultry industry relies heavily on imported yellow corn from the United States and corn imports continue to increase year-to-year. According to

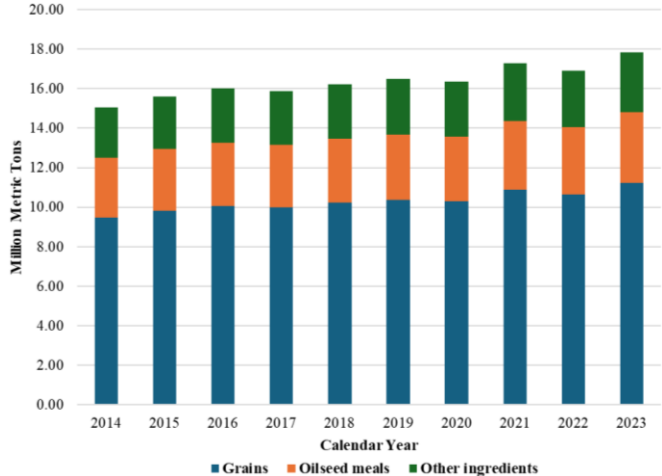
sources, between 80 and 95 percent of the corn used by the major chicken producers comes from imports, and 75 percent of production costs are from feed. In 2024, the domestic industry capitalized on the relatively low international corn prices compared to previous years and benefited from advantageous prices due to a strong Mexican peso. Even though several grains are used in chicken feed, corn is the cornerstone of the bird’s diet.



Source: Agricultural and Fisheries Information Service (SIAP)

Commercial feed production in Mexico experienced an average annual growth rate of nearly three percent for broiler feed and over one percent for layer feed in 2023. The growth rate is expected to increase similarly in 2024.

Figure 2: Mexico’s Consumption of Feed Inputs in the Poultry Sector



Source: National Association of Poultry Producers (UNA)

Lower feed costs allowed producers to improve diets at different stages of the production cycle, which is reflected in higher production. Mexico's poultry industry exhibits a notable concentration within a select group of states. Jalisco holds the largest share of both the poultry flock population and egg production nationwide, followed by Puebla, Veracruz, Aguascalientes, and Querétaro. These five states collectively account for 50 percent of Mexico's total poultry population.

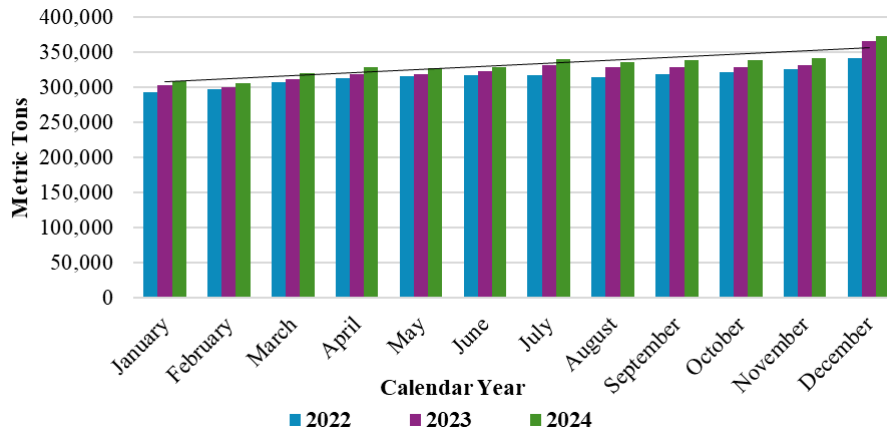
Figure 3: Mexico’s Flock – Top Ten States



Source: 2023 Agricultural and Fisheries Information Service (SIAP)

In terms of chicken meat production, Veracruz leads the nation, followed by Aguascalientes, Jalisco, and Querétaro. Durango, Chiapas, Guanajuato, and Puebla also contribute to chicken meat production, although to a lesser extent. Notably, these eight states together represent 70 percent of Mexico's total chicken meat production.

Figure 4: Mexico’s Chicken Meat Production



Source: Agricultural and Fisheries Information Service (SIAP)

Disease Pressure

Highly Pathogenic Avian Influenza (HPAI) remains a persistent threat to Mexico's poultry industry, largely due to migratory bird patterns. No HPAI outbreaks were reported in 2024, and no authorized government vaccination campaigns were conducted. The availability of HPAI vaccines in Mexico is strictly regulated, exclusively accessible through the government, and require explicit prior authorization for use.

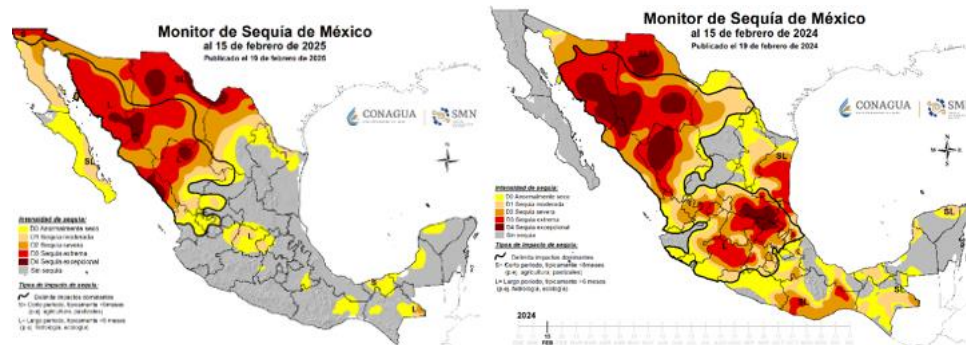
In 2024, Mexican poultry producers proactively enhanced biosecurity protocols to safeguard their flocks and bolster the health of their breeder stock. These measures included the strategic separation of breeder, hatchery, layer, and broiler operations across distinct farm locations to create firebreaks against potential disease spread. A discernible trend over the past five years is the relocation of breeder flocks to more geographically isolated areas to minimize the risk of HPAI outbreaks between farms.

Avian Infectious Bronchitis (AIB) is a highly contagious viral poultry disease that primarily affects young chickens. In 2024, AIB outbreaks were reported in various regions and led to economic losses due to reduced growth rates, increased mortality, and decreased egg production. Many producers fail to report outbreaks promptly, either due to a lack of awareness or a reluctance to disclose information that could negatively impact their operation. Mexico lacks a comprehensive surveillance and reporting system for AIB, hindering efforts to track the spread of the disease and implement effective control measures.

Weather Conditions

Mexican poultry producers are generally well-prepared to mitigate the effects of annual temperature and precipitation fluctuations. From January to April 2025, the National Water Commission (*CONAGUA* by its Spanish acronym) anticipates below-normal precipitation patterns and warmer temperatures across much of the country. Most poultry operations have climate control mechanisms within their facilities to maintain optimal environmental conditions.

Figure 5: Year-to-Year Drought Situation, February 2025 vs. February 2024



Source: Comisión Nacional del Agua (CONAGUA), Servicio Meteorológico Nacional (SMN)

Furthermore, producers have secure access to water supplies through dams, reservoirs, and water trucks for their operations, and most of them benefit from preferential electricity rates designated for agricultural use. These factors help to offset the increased operational costs associated with managing climate variations.

Consumption

2025

Poultry consumption is forecast to rise three percent in 2025 to 5.1 MMT. Chicken meat remains the most affordable meat in Mexico. Per capita chicken meat consumption is expected to increase by two percent in 2025 due to higher beef and pork prices. Population growth, higher disposable incomes (announced minimum wage increase, relatively low unemployment levels, and continued social

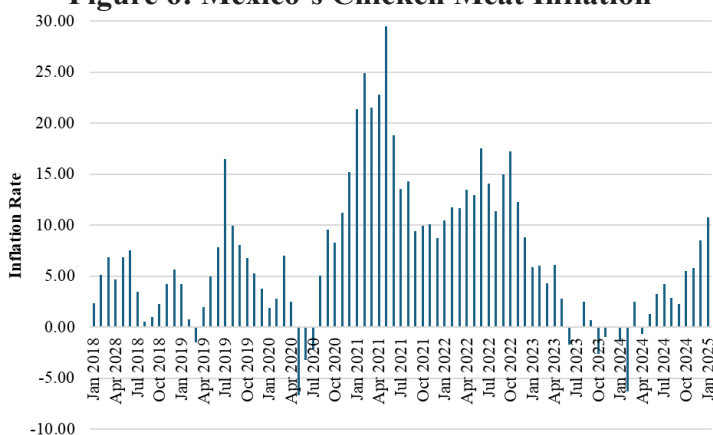
programs), and demand from tourism and restaurants are also expected to increase chicken meat consumption.

Table 2: Mexico Retail Price Comparison (Pesos per Kilogram)

	Jan-2025	Jan-2024	Variation (%)
Chicken Breast	133.01	120.0	10.84
Chicken Leg Quarter	80.21	77.61	3.4
Whole Bird	47.07	43.69	7.74
Bacon	405.38	442.56	-8.4
Loin	139.01	108.51	28.1
Pork Chop	135.57	113.63	19.3

Source: Mexican Meat Council (COMECARNE)

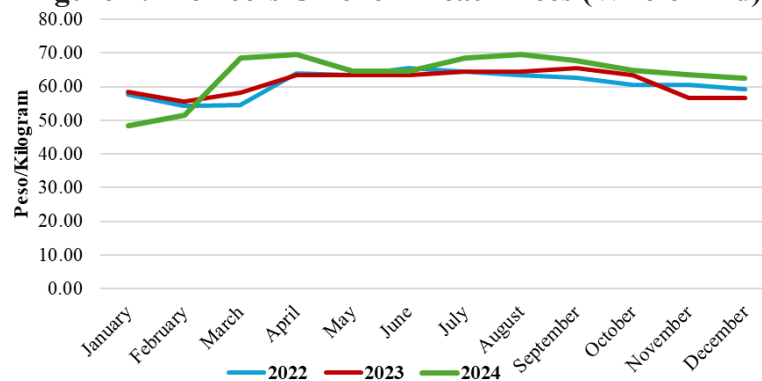
Figure 6: Mexico's Chicken Meat Inflation



Source: National Institute of Statistics and Geography (INEGI)

Whole bird purchases dominated consumer purchases in 2024, with 80 percent of the market. The consumer preference for whole birds is expected to continue in 2025. Consumers prefer whole birds due to lower prices compared to cuts or value-added products, a widespread consumer perception that meat from whole birds is more fresh than other chicken meat, and the greater availability of carcasses at local markets compared to other cuts.

Figure 7: Mexico's Chicken Meat Prices (Whole Bird)



Source: Service of Agri-food and Fisheries Information (SIAP)

As of February 2025, whole chickens were sold in Mexico City public markets at an average price of 59.30 pesos/kilogram (1.31 USD per pound), compared to chicken breast at an average price of 113 pesos/kilogram (2.50 USD per pound).

Image 1. Market Display of Chicken Meat Whole Birds (left) and Chicken Breast (right)



Source: FAS Mexico

In 2025, more consumers are expected to shift purchases back to chicken meat (after a shift in 2024 towards beef and pork due to higher disposable incomes and better prices), and its growth is expected at a faster pace for the next five years.

2024

Poultry consumption is estimated to rise two percent in 2024 to 5.0 MMT. Chicken meat remained the most affordable meat in Mexico and higher disposable incomes led to increased poultry product purchases. However, the rate of growth of per capita chicken meat consumption was dampened as consumers used increased purchasing power to upgrade their meat purchases to higher-priced animal protein such as beef and pork. Chicken meat consumption grew by 1.3 percent from 2023 to 2024, compared to 4.2 percent from 2022 to 2023.

Meat consumption in Mexico is largely influenced by affordability with inflation being a particular burden for low-income households. The current per capita consumption of chicken meat is 38 kilograms (kg) (84 pounds) annually.

Figure 8: Inflationary Behavior of Chicken Meat



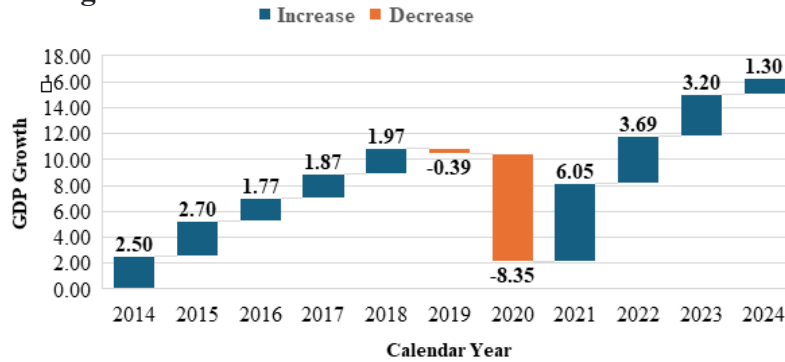
Source: National Institute of Statistics and Geography (INEGI)

In 2024, the processing sector sought to expand its market share by experimenting with new Ready-to-Eat (RTE) products for supermarkets and e-commerce. Market penetration for these products fell short of expectations, and the processing industry continues to face intense competition from whole birds and chicken parts at public markets.

Economic Outlook

Mexico's economic outlook for 2025 presents a mixed picture. GDP growth is expected to be modest, with forecasts by major banks at 1.2 percent. Meanwhile, inflation is anticipated to gradually decrease through 2025 and early 2026. Private consumption is likely to be a key driver of growth.

Figure 9: Mexico’s Gross Domestic Product Growth

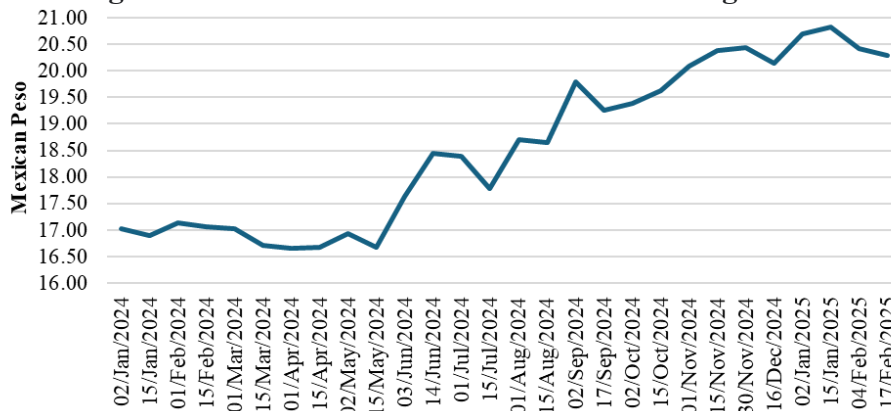


Source: World Bank

Public insecurity continues to constrain economic growth. Sources indicate that in 2024, nearly 40 percent of thefts consisted of food, drink, and livestock. Agricultural products also experienced an increase in thefts with fertilizers reported as the most stolen product for this category.

At the beginning of 2024, the peso strength compared to the United States dollar reached levels not seen in several years. However, the peso started to weaken in May 2024 and has continued a gradual decline into 2025. Some analysts anticipate a possible further depreciation of the Mexican peso in 2025. A weaker Mexican peso could create more competitive prices of domestic poultry compared to imported product.

Figure 10: Mexican Peso to U.S. Dollar Exchange Rate



Source: Mexico’s Central Bank (BANXICO)

The National Consumer Price Index (INPC) for the first two weeks of January 2025 reported a 3.7 percent year-over-year increase in overall inflation. Within the livestock and poultry products, specific commodities registered the following year-over-year increases:

- Beef: 6.4 percent
- Pork: 9.7 percent
- Chicken meat: 10.1 percent
- Eggs: 5.8 percent

More Household Disposable Income Leads to Higher Meat Purchases

From mid-2023 through 2024, Mexico maintained a relatively low unemployment rate, generally below three percent. Relatively low unemployment levels and increased wages contributed to increased meat consumption in the Mexican population. Between 2018 and 2024, the monthly minimum wage increased by 110 percent, reaching 7,468 pesos (USD 420) in 2024 compared to approximately 2,650 pesos (USD 150) in 2018. The GOM recently announced a 12 percent minimum increase wage for 2025.

Remittances are also a source of household income which support meat consumption. According to BBVA Research, Mexico received a record USD 64.7 billion in remittances in 2024, an increase of two percent compared to 2023. The average transaction amount is USD 390.

Domestic consumption is also stimulated by social programs that provide direct cash transfers to various social groups (e.g. single mothers, students, seniors).

Table 3: Social Programs Comparison

Period	2007-2012	2013-2018	2019-2024
Amount in pesos	67,859 million	211,866 million	1,440,109 million
Amount in USD	3.4 billion	10.6 billion	72.0 billion

Source: Post estimate using www.gob.mx data (Exchange rate of 20.00 pesos: USD 1.00)

Although the 2025 benefits are expected to decrease compared to 2024, they will continue to contribute to disposable incomes.

High Demand for Meat from Tourism and HRI Sectors

According to Mexico’s Secretariat of Tourism (SECTUR), Mexico hosted over 32 million tourists in 2023, with the number of visitors estimated higher in 2024. Increased tourism and HRI sector use is expected to drive up demand for food, including for chicken, pork, and beef products. The Mexican restaurant industry grew by 4.5 percent in 2024. This expansion, coupled with the presence of nearly 490,000 food establishments nationwide, has further contributed to the growing demand for chicken meat.

Population Growth Expected to Create Higher Meat Consumption

Mexico's National Institute of Statistics and Geography (INEGI) estimates the population growth rate in 2024 at 0.7 percent, with the population surpassing 129 million inhabitants. While positive population growth is expected in 2025, the rate of growth has slowed over the last 20 years. Projections indicate that the population could reach 133 million inhabitants in 2025. Population growth is expected to result in more food demand and contribute to increased chicken consumption in Mexico.

Trade

Imports

2025

Poultry imports are forecast to rise four percent in 2025 to 1.04 MMT. Increased domestic demand is expected to drive higher imports in 2025. Rising demand from the HRI sector and growing household consumption are expected to drive imports, even with a weaker Mexican peso.

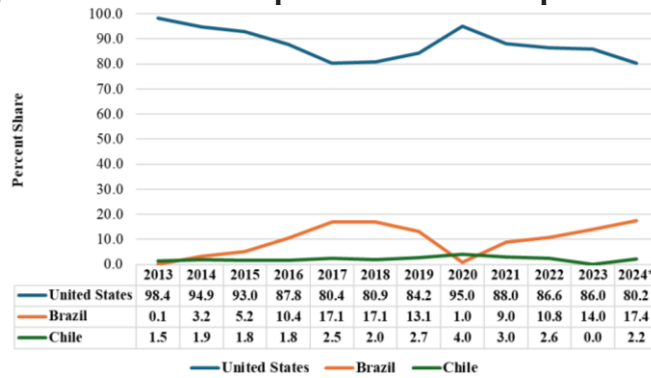
According to local sources, current HPAI outbreaks in major exporting countries such as the United States provide trade uncertainty. Over the past three years, HPAI outbreaks in the United States intermittently disrupted the supply of raw materials for Mexican processors, prompting importers to seek alternative sources such as from Brazil. However, importers are expected to continue to prefer U.S. chicken meat due to established supply chains and the availability to import of fresh and chilled product.

2024

Poultry imports are estimated to decrease one percent in 2024 to 1.00 MMT. With domestic consumption slowing in 2024 compared to 2023, processors required less product, which was met by domestic production, reducing the need for increased imports.

From January to November 2024, the United States share of the Mexican chicken meat market dropped to 80 percent, compared to 86 percent in 2023, while Brazil's share increased to 17 percent from 14 percent in 2023. The drop in the United States share was due to supply disruptions in United States from HPAI, as well as tariff-free access for Brazilian product under the Presidential Anti-Inflation Decree (see Policy section). Some industry contacts assert that processors stocked Brazilian product in case there were further disruptions from U.S suppliers. Chicken meat from Brazil arrives to Mexico frozen. Importers prefer U.S. chicken meat due to the availability of fresh and chilled product and faster delivery, which feeds into just-in-time processing.

Figure 11: Mexico’s Top Chicken Meat Import Sources



*Note: Data through November 2024

Source: Post estimate with data from the National Association of Poultry Producers (UNA) and Trade Data Monitor.

In 2024, U.S. chicken meat exports consisted of chicken leg quarters (40 percent), breast meat (24 percent), mechanically deboned meat (17 percent), chicken cuts/pieces (13 percent), wings (four percent), and other pieces (two percent).

Exports

2025

Poultry exports are forecast to rise 25 percent in 2025 to 5,000 metric tons (MT). The stronger U.S. dollar relative to the Mexican peso is enhancing the price competitiveness of exports.

Mexican poultry processors are strategically targeting export expansion into the United States and Central America with retail sampling promotions to increase exports of value-added products such as homemade ready-to-eat (RTE) and ready-to-cook (RTC) tacos or burritos with chicken meat. Processors anticipate growth in RTE exports to the United States to meet demand from Mexican American markets and Mexican cuisine enthusiasts.

The growth of Mexican poultry exports to the United States is still hindered by a sanitary requirement that restricts exports to heat-treated products. Furthermore, robust domestic demand for chicken in Mexico limits the availability of product for export.

2024

Poultry exports are estimated to remain flat in 2024 at 4,000 metric tons (MT). Mexico's ability to export raw and fresh chicken meat is constrained by trade partner sanitary standards and limited product availability due to strong domestic demand. Additionally, during the first half of the year a strong Mexican peso discouraged exports, while domestic demand remained robust throughout the year. In 2024, the United States was the exclusive destination for Mexican poultry exports.

Policy

Mexico Declares Ineffective Trade Restrictive Measures Concerning Genetically Engineered (GE) Corn

On February 5, the GOM [published](#) a decree to declare ineffective measures concerning genetically engineered (GE) corn that the United States successfully challenged in the USMCA dispute. The decree declared ineffective article seven of the [2023 Corn Decree](#), which instructed agencies and entities of the Federal Public Administration to carry out actions to gradually substitute of genetically modified corn for animal feed. Animal feed and livestock sector contacts report that they remain vigilant for any future non-science-based measures by the GOM that would impact market access to corn and other feed ingredients. In 2024, the United States exported USD 5.6 billion of corn to Mexico, the largest export market for U.S. corn.

Extension of Presidential Anti-Inflation Decree

On December 31, 2024 the Government of Mexico [published an extension](#) to the presidential anti-inflation decree for select agricultural products to combat inflation and the impacts of drought on food prices. The decree will continue to give non-free trade agreement partners the duty-free access the U.S. enjoys under USMCA. The benefits apply to companies who are part of the 'Register of Importers of Products of the Basic Basket.' In article one, the decree updates HS codes included on [the January 6, 2023 version](#) of the anti-inflation decree. The extension is valid through December 31, 2025, but companies registered under the program may use the benefits of the decree until March 31, 2026.

Meat and Poultry

- Duty free import benefits remain in place for meat and poultry products.
- Brazilian poultry and pork will continue to be imported into Mexico tariff and quota free. Without the decree, duties for poultry and pork are 75 and 20 percent, respectively.

For More Information

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MX2023-0060	Poultry and Products Annual	11/28/2023
MX2023-0007	Poultry and Products Semi-annual	02/21/2023
MX2022-0045	Poultry and Products Annual	09/06/2022
MX2022-0005	Poultry and Products Semi-annual	03/01/2022

Attachments:

No Attachments