



Overview of Mexico's Agri-food sector

Agriculture & Agri-food Network in Mexico

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Missions in Mexico - Trade regional distribution





Country Overview & Key Statistics





Mexico at a Glance

• Population	131.2 million (2024)
• Median age	29.5 years old (67% is between 15-64 years old)
• GDP Growth	+3.2% (2023)
• Minimum Wage	MXN \$248.93 (CAD \$17.22)
• Urban Population	87.8%
• Inflation	4.69% (Q3 2024)

Mexico: A Snapshot

A light gray map of Mexico is centered on the slide. It features white outlines for its states. Several colored rectangular callout boxes are overlaid on the map, each containing a statistic. The boxes are in two colors: a dark red and a teal. The statistics are arranged in two columns, one on the left and one on the right of the map.

Top 15 Largest Economy in the world

2nd Largest Economy in Latin America

11th Most Populous Country in the world

6th Most Visited Country in the World

12th Global Producer of Agricultural Crops

10th Global Producer of Primary Livestock

12th Largest Importer of Agri-Food products in the world

10th Largest recipient of Foreign Direct Investment

7th Largest Food Exporter Worldwide

14 FTA's with more than 50 countries

11th Global Food Producer

17th Global Producer of Fishery & Aquaculture



Market Trends, Opportunities and Key Considerations



Opportunities & Insights for Canadian Exporters



Health & Wellness



Innovation



Convenience



Private Label



Quality



E-Commerce



Sustainability



Diversification



Navigating the challenges

The Mexican market is extremely price sensitive.

High transportation costs.
Canadian exporters need to identify cost-effective shipping and explore consolidation if possible.

High insurance costs, due to insecurity in some regions of Mexico.

Mexico's size and diversity are often under-appreciated.

Strong competition, domestically and from the U.S., and to a lesser extent from other countries.

Profit margins and credit terms need to be factored in.



Overview of the Retail Sector



Insights into Mexico's Retail Landscape

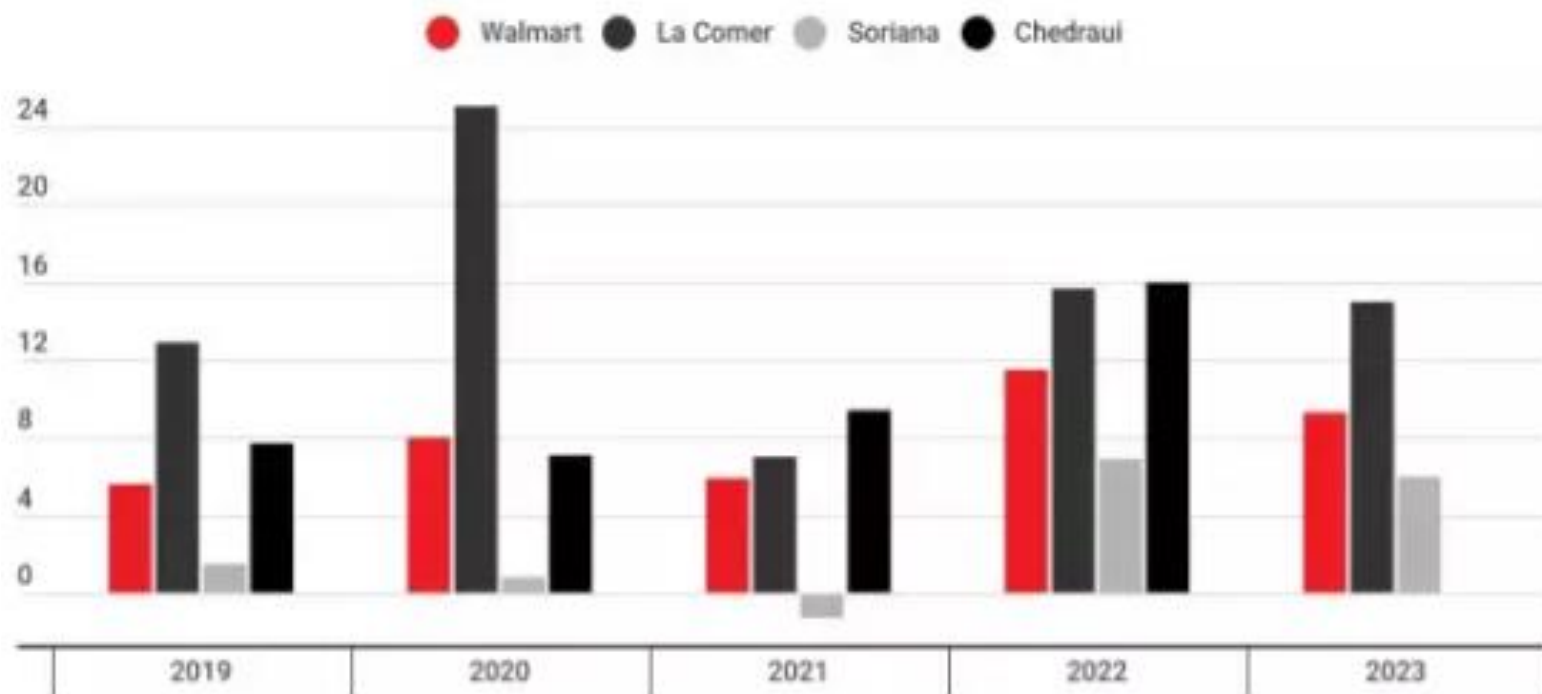
Retail Market size is estimated at 94.4 billion USD for 2024 and is expected to grow by 6% during 2022-2027,

Walmart is the retail market share leader with over 3,000 stores. Their Bodega Aurrera format is the most common with about 80% of the stores

La Comer has experienced the fastest growth of all retailers 5 years in a row – 15.7% in 2023.

It is expected that for 2024, Mexico will be positioned as the **#1 country in e-Commerce Retail growth worldwide.**

Key retailers' sales growth in 2023



Fuente: Soriana, Walmart, Chedraui y La Comer

Retail Competitive Landscape

Supermarkets



Regional Chains



Convenience



Discounters



E-commerce





Overview of the Ingredients Sector



Geographical presence of main food processors in Mexico



Opportunities in Food Ingredients & Processing

Processed food ingredients are in high demand in Mexico, particularly those that tend to be difficult to obtain domestically.

Growth Opportunities for Canadian companies

Opportunities exist for food ingredients that are:



Rich in fiber, omegas, vitamins, minerals and probiotics.



High protein & fiber content such as wheat, oats, pulses, etc.

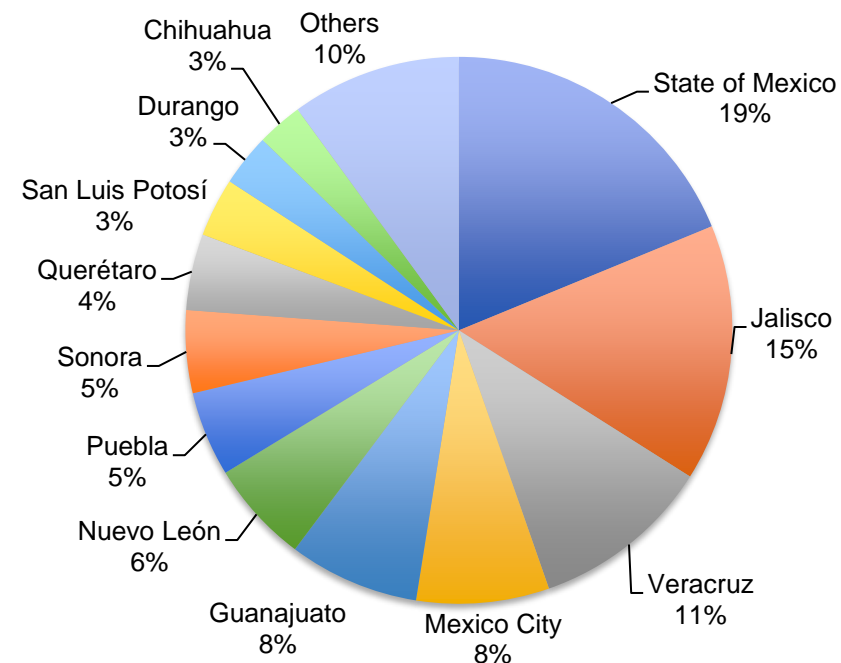


Non-artificial food additives used to enhance the taste, color and texture of food.



Premium & innovative food ingredients that can help differentiate processed food products and provide value-added.

Distribution of Mexico's processed food production and concentration of the food ingredients' demand



Animal Feed

- With an area of approximately 108.9 hectares dedicated to livestock, Mexico stands out as a nation committed to livestock production.
- Mexico is among the **Top 5 largest feed producers** in the world.
- Animal protein demand increases beyond population growth in Mexico. Feed manufacturers trust that the sector will continue to grow at the same **rate at an average of 2.5%**, mainly in broiler, layer and swine feeds.
- Mexico has **620 feed mills** with a production capacity of 46.9 (MMT) and an **annual production of 41.4 MMT of feed**.
- The industry uses 23.8 MMT of feed grains, 9.2 MMT of oilseed protein meals and DDGS, and 8.4 MMT of other raw materials.
- **30% of Mexico's feed** manufacturing base is in western Mexico (covered by GJARA); Jalisco output 24%.
- Mexico's domestic supply of feed ingredients is not sufficient and therefore, significant volumes of have to be imported.



Ag-Tech Ecosystem

- Only 10% of Mexican growers have a high-technological Development.

Challenges

- Water scarcity / Droughts
- Soil degradation
- Labour shortages



Key Opportunities for Canadian exporters

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Ag-Tech Ecosystem

Market Entry Tips

Main distribution channel: Through local distributors

- Engaging with agricultural associations that conglomerate farmers across various regions.

Challenges


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- Soil degradation
- Labour shortages



Key Opportunities for Canadian exporters

- Sustainable solutions: Regenerative Agriculture, Carbon Footprint Reductions, Water and Wastewater Recycling
- Precision Agriculture: To increase yields and generate savings
- Precision Livestock Farming: for feed purposes and to monitor diseases.
- IoT, AI, drones and remote sensors that optimize processes such as irrigation, fertilization and crop monitoring.

Mexican Business Culture & Practices

- 💡 Market requires **physical presence**.
- 💡 Business are mostly based on **personal relationships**.
- 💡 Social customs make it challenging to say no. Therefore, 'yes' does not always mean yes.
- 💡 Prepare to invest **time in establishing relations** and gaining the trust of your counterparty.
- 💡 Having a Spanish-speaking member in your team is an **asset**.
- 💡 **WhatsApp** is a **key tool** for follow-up. 





Expo ANTAD & Alimentaria 2026



Canada Participation at Expo ANTAD & Alimentaria

May 19-21 2026, in Guadalajara, Jalisco

- Expo ANTAD and Alimentaria is Mexico's largest retail-focused trade show.
- In 2025, the expo counted more than 1,200 exhibitors and was attended by 47,000 visitors from 67 countries.
- Mexico's major retailers, convenience stores, specialty stores, and department store chains, as well as a range of distributors have booths at the event with buyer teams onsite.
- Canada Pavilion organized by the TCS in collaboration with key Canadian agri-food trade associations as well as Canadian provinces.
- Program includes
 - B2B Program
 - TCS Briefing
 - Retail store tours





Q&A



Thank you!

Don't hesitate to reach out:
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