Euromonitor International

Staple Foods in Mexico

November 2025

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Staple Foods in Mexico

EXECUTIVE SUMMARY

Stable performance as consumer rely more on staple foods

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Economic strife shapes category performance
Growing scrutiny of processed foods drives emphasis on more natural ingredients

WHAT'S NEXT?

Household dependency on staples to remain strong amid economic uncertainty
Expansion of modern retailers will raise visibility of staples

COMPETITIVE LANDSCAPE

Fragmented landscape is led by Grupo Bimbo SAB de CV
Toyo Suisan Kaisha Ltd is most dynamic player

CHANNELS

Small local grocers enjoy a prominent position
Modern grocery channels are gaining traction

MARKET DATA

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SOURCES

Baked Goods in Mexico

KEY DATA FINDINGS

2025 DEVELOPMENTS

Baked goods show some resilience as staple products

INDUSTRY PERFORMANCE

High prices drive value sales of baked goods
Steady demand for indulgent staples supports category

WHAT'S NEXT?

Grupo Bimbo SAB de CV to enhance production and logistical infrastructure in Mexican market

Baked goods manufacturers to improve the nutritional value of indulgent products

Focus on affordability and basic baked goods

COMPETITIVE LANDSCAPE

Private label share remains low

CHANNELS

Food specialists lead due to widespread consumption of tortillas (flatbread)

Hypermarkets and discounters gain retail value share

CATEGORY DATA

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Breakfast Cereals in Mexico

KEY DATA FINDINGS

2025 DEVELOPMENTS

Challenging trading period for breakfast cereals

INDUSTRY PERFORMANCE

Lower purchasing power hampers demand for breakfast cereals

Indulgence and health appeal spurs growth in some categories

WHAT'S NEXT?

Innovation will bring higher value products to market

Rising demand for products made with simple, natural and nutritious ingredients

Private label to remain a niche in breakfast cereals

COMPETITIVE LANDSCAPE

Kellogg de México SA de CV leads with extensive brand portfolio

CHANNELS

Modern channel leads with heavy promotional focus

Discounters and retail e-commerce are gaining traction

CATEGORY DATA

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Processed Fruit and Vegetables in Mexico

KEY DATA FINDINGS

2025 DEVELOPMENTS

Stable growth reflects heavy use of processed vegetables in Mexican cuisine

INDUSTRY PERFORMANCE

Modest volume growth is driven by slowing price inflation
Droughts and US tariffs lead to poor results in shelf-stable tomatoes

WHAT'S NEXT?

Shelf-stable beans lay the foundations for future growth
Health and wellness to shape purchasing decisions
Rising disposable incomes will boost demand for frozen products

COMPETITIVE LANDSCAPE

Local player Conservas La Costeña SA de CV remains dominant
Del Monte brand is unaffected by parent's financial difficulties in the US

CHANNELS

Small local grocers are popular channel for shelf stable beans and vegetables
Modern channel will gain appeal as demand for product variety and higher quality rises

CATEGORY DATA

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Processed Meat, Seafood and Alternatives To Meat in Mexico

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising prices underpin value growth in 2025

INDUSTRY PERFORMANCE

Overall consumption drops amid higher prices

Supply shortages drive spike in poultry prices

WHAT'S NEXT?

Rising popularity of processed meats to give category a boost

Product adaptions will tap into healthier lifestyles and need for transparency

Shelf stable meat faces several barriers to growth

COMPETITIVE LANDSCAPE

Sigma Alimentos SA de CV enjoys a healthy lead

Fragmented competitive landscape

CHANNELS

Mexicans rely heavily on small local grocers for processed meat, seafood and alternatives to meat

Convenience factor drives appeal of retail e-commerce

CATEGORY DATA

COUNTRY REPORTS DISCLAIMER

Rice, Pasta and Noodles in Mexico

KEY DATA FINDINGS

2025 DEVELOPMENTS

Stronger reliance on rice in tougher economic climate

INDUSTRY PERFORMANCE

Mexican households depend on staples as spending is curtailed

Rice remains a vital staple in local cuisine

WHAT'S NEXT?

Global market conditions to weigh on category performance

Health and wellness trends will be growth driver in pasta

Private label is well positioned to gain further ground

COMPETITIVE LANDSCAPE

Toyo Suisan Kaisha Ltd strengthens its position

Fábrica de Pastas Alimenticias La Moderna has dominant position in dried pasta

CHANNELS

Small local grocers are dominant channel

Convenience stores are important channel for noodles

CATEGORY DATA

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