



**Euromonitor
International**

Staple Foods in Mexico

November 2025

Table of Contents

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

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research 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

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025
Table 14 - Sales of Baked Goods by Category: Value 2020-2025
Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025
Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025
Table 17 - Sales of Pastries by Type: % Value 2020-2025
Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025
Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025
Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025
Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030
Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030
Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030
Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[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

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025
Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025
Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025
Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025
Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025
Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025
Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030
Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030
Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030
Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025
Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025
Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025
Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025
Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025
Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025
Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025
Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025
Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030
Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030
Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030
Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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 adaptations 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

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025
Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025
Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025
Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025
Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025
Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025
Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025
Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025
Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025
Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025
Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025
Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025
Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030
Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

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

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025

Table 69 - NBO Company Shares of Rice: % Value 2021-2025

Table 70 - LBN Brand Shares of Rice: % Value 2022-2025

Table 71 - NBO Company Shares of Pasta: % Value 2021-2025

Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025

Table 73 - NBO Company Shares of Noodles: % Value 2021-2025

Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025

Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025

Table 76 - Distribution of Rice by Format: % Value 2020-2025

Table 77 - Distribution of Pasta by Format: % Value 2020-2025

Table 78 - Distribution of Noodles by Format: % Value 2020-2025

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030

Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/staple-foods-in-mexico/report.