



# Processed Meat, Seafood and Alternatives To Meat in Mexico

November 2025

## 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 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

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## Staple Foods in Mexico - Industry Overview

### 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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Table 17 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

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Table 25 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

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## SOURCES

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