



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

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 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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