

Milk Powder Market in Mexico



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MEXICO

Executive Summary

Mexico has been an important market for Manitoba's agri-food products for many years, particularly for canola (seed and oil), pork cuts and processed potatoes. In 2023, Mexico was the fourth-largest destination for Manitoba's agricultural and agri-food exports accounting for 5.9 per cent of Manitoba's exports or \$553 million.

Mexico's agri-food market has been growing over the years at a compound annual growth rate (CAGR) of 11.96 per cent for the period from 2019 to 2023, reaching \$53.4 billion in global imports in 2023. The dairy sector in particular has shown large growth. It represents the second most important activity in Mexico's livestock sector, accounting for 22.8 per cent of the total value of the sector.

Although Mexico has abundant natural resources and technology to produce fluid milk, it has largely increased its powder milk imports over the years. It is now the second largest importer of milk powder worldwide after China, accounting for 6.5 per cent of global imports that reached \$1.6 billion in 2023. The market size and growth (8.1 per cent CAGR 2019-2023) make Mexico an attractive destination for international sales.

Key Demographics and Economic Indicators¹

Country name: United Mexican States (Estados Unidos Mexicanos)

Head of State and Government: Andrés Manuel López Obrador

Government Type: Federal presidential republic

Capital: Mexico City

Legislature: Parliament (Upper and Lower House)

Judiciary: Supreme Court, headed by the Chief Justice of Mexico

Location: Mexico is a country in southern North America. It is bordered to the north by the U.S.; to the south and west by the Pacific Ocean; to the southeast by Guatemala, Belize, and the Caribbean Sea; and to the east by the Gulf of Mexico. Mexico covers 1,972,550 km,² making it the world's 13th-largest country by area.

Economic indicators: Mexico has the world's 15th largest economy by nominal GDP (\$1.42 trillion).

Population: 126 million people (Census 2020)

GDP growth: 3.1 per cent (2022)²

GDP per capita: \$10,950 (2022 estimate)

GDP per capita rank: 71st (nominal, 2022 estimated)

Inflation: 7.8 per cent (2022)

¹ Wikipedia.org

² National Statistics Agency INEGI

Consumption and the Market

The dairy market is prominent in Mexico. Mexico is the eight largest milk consumer in the world and the second largest milk consumer in both North America, after the U.S., and in Latin America, after Brazil. Mexico is also the second largest milk producer in Latin America, after Brazil. In 2022, milk production accounted for 17.6 per cent of animal production in Mexico. In 2021, dairy production contributed with nine per cent of the Gross Domestic Product (GDP), positioning itself as the fourth manufacturing sub-sector within the Mexican food industry.

The total milk powder consumption forecast for 2024 is 498,000 tonnes, an 11 per cent increase compared to 2023. The consumption for 2023 was 447,000 tonnes, an 18 per cent increase compared to 2022.

The hotel, restaurant and institutional (HRI) sector is the main reason for the increased consumption of skim milk powder in 2023 and 2024. Additionally, dairy processors have been offering innovative and value-added products which have increased consumption demand. As fluid milk usage by households loses some market share, consumption through dairy products compensates. Some processors provide new packaging formats, and offer products through new marketing channels, which results in more consumption. According to industry, a third of dairy food products are wasted every year. Innovative packaging and processing methods offer extended shelf life for companies to store and distribute milk powder products throughout Mexico's different regions and climates.

Skim milk powder, with a fat content less than 1.5 per cent, is the fifth largest commodity Mexico imported between 2019 and 2023, representing over three per cent of the total Mexican imports of agricultural and agri-food products as shown in Table 1. Skim milk powder imports grew \$417 million between 2019 and 2023, a compound annual growth rate (CAGR) of 7.93 per cent as shown in Table 1.

Table 1. Mexican imports of agricultural and agri-food products

HS Code	Description	2019 \$	2020 \$	2021 \$	2022 \$	2023 \$	CAGR %
Total	Total	34,027,084,401	32,601,087,619	42,356,217,099	50,215,324,078	53,472,773,097	11.96
100590	Corn	4,096,293,505	3,911,049,826	6,019,978,315	7,163,436,619	8,019,343,545	18.29
120190	Soybeans	2,805,137,061	2,912,495,631	3,970,319,977	5,310,881,086	4,867,188,043	14.77
020312	Fresh/chilled hams, shoulders/cuts of swine	1,007,825,359	939,329,662	1,378,812,881	1,767,979,533	2,137,561,107	20.68
100199	Wheat and meslin	1,386,479,634	1,327,642,465	1,956,701,444	2,319,440,185	1,845,419,458	7.41
040210	Skim Milk powder (fat content <1 .5%)	1,169,063,707	978,373,459	1,208,382,660	1,741,581,574	1,586,272,636	7.93
020130	Fresh or chilled beef	1,097,996,639	869,308,875	1,080,978,632	1,039,502,730	1,324,177,537	4.79
210690	Food preparations	945,681,501	912,009,511	1,153,416,641	1,219,662,508	1,226,561,153	6.72
230400	Soybean oilcake	850,403,218	885,788,617	1,053,382,626	1,128,496,750	1,108,734,252	6.86
120510	Canola seeds	532,332,896	671,633,414	1,113,987,512	1,221,076,189	1,083,915,824	19.45
020714	Frozen cuts poultry	580,077,729	337,699,109	547,526,190	865,695,832	822,219,130	9.11

Source: Global Trade Tracker – March 2024

The Mexican Milk Powder Production and Trade Balance

Dairy is an important sector in Mexico’s agriculture and agri-food industry with a large market size. Mexican market of milk powder has been increasing over the years. It is expected to increase in size to 90,700 tonnes by 2028 (Table 2), due to the projected population increase, as well as the expansion of social programs. Although Mexico has a large milk production and processing capacity, it appears that more competitive international prices for milk products have kept local production and processing of milk powder quite stable since 2023 (Table 3), relying on imports to meet the growing national demand. Local production of milk powder has been increasing slightly since 2019. In 2023, the country counted 6,650 milk cows and produced over 13,000 tonnes of milk, with 125,000 tonnes of locally produced skim milk powder in 2023, up from 124,000 metric tons the previous year. Mexican skim milk powder production reached its peak volume in 2016, when 144,000 metric tons of this type of milk powder were produced. Whole milk powder production in Mexico was 46,000 metric tonnes in 2023, up from 45,000 metric tonnes the previous year.

Current market size and forecast 2024 to 2028

Table 2. Retail market size and forecasted volume for the Mexican Milk Powder market (in millions of Canadian dollars)

Description	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Total volume powder milk ('000 tonnes)	81.4	80.3	80.5	83.0	85.4	87.0	88.2	89.2	90.1	90.7
Total volume value (CAD - million)	811.1	833.8	900.2	1008.2	1,100.0	1,180.4	1,250.8	1,320.2	1,388.6	1,456.2

Source: Euromonitor - March 2024 – Conversion rate applied as of April 2, 2024.

The retail sales value of milk powder in Mexico was estimated at \$1.1 billion and 85,400 tonnes in volume in 2023, up by 9.1 per cent and 2.9 per cent respectively, compared to previous year.³ This took place despite the inflation rate of 4.7⁴ per cent in 2023, high food and energy prices and 72 per cent of Mexicans concerned with the increased cost of everyday items.⁵

The Mexican milk powder market size is expected to grow to 90,700 tonnes by 2028, as shown in Table 2, mainly due to the projected population increase.

As shown in Table 3, milk powder production in Mexico expanded by 8,000 tonnes over the period of 2019 to 2023, representing an increase of 4.8 per cent over the period.

Table 3. Milk Powder Production in Mexico

Year	2019	2020	2021	2022	2023
Production of whole milk powder ('000 tonnes)	44	45	45	46	48
Production of skim milk powder ('000 tonnes)	121	122	123	124	125

Source: USDA (United States Department of Agriculture) April 2024

The production forecast for 2024 is 49,000 tonnes of whole milk powder and 126,000 tonnes of skim milk powder, a two per cent and 0.8 per cent increase respectively, compared to 2023. The forecast increase in 2024 is attributed to increased fluid milk production and the optimization of installed capacity in milk drying facilities. Value-added processors continue to demand whole milk powder to reconstitute into sweetened milk, baby formulas, wellness products, fortified products, and others. On the other hand, the demand from industrial processors of dairy products is the main driver for the increase in production of skim milk powder.

Mexico’s milk powder production potential is hampered by the existing milk drying infrastructure and the reluctance from the dairy sector to invest in improved or added installed capacity due to legal uncertainty and high public insecurity. In addition, price and logistics continue to incentivize imports over domestic production.

³ Euromonitor International

⁴ Inflationtool.com

⁵ Euromonitor International Voice of the Consumer: Lifestyles Survey, fielded January-February 2024

By 2030, the main drivers for dairy consumption in Mexico are expected to be population growth and household budgets. Despite continued food inflation on dairy products in Mexico, consumers find ways to save money and increase consumption, such as through a change from brand loyalty to discount store purchases and social programs.

Mexican Milk Powder Imports

In 2023, Mexico was the second largest global importer of milk powder after China, accounting for 6.5 per cent of the total global imports in value. That is equivalent to \$1.4 billion. Imports of milk powder to Mexico have increased since 2019 with a CAGR of 8.1 per cent in the 2019–2023 period, indicating potential market opportunities for Manitoba dairy processors. Imports of skim milk powder make up 90 per cent of the total consumption.⁶

While skim milk powder accounts for most of Mexican milk powder imports, imports of whole milk powder showed the largest growth between 2019 and 2023, with a CAGR of 20.5, as per Tables 3 and 4.

The import forecast for 2024 is 450,000 tonnes, a 4.9 per cent increase compared to 2023. The forecast increase is driven by strong domestic demand and competitive international prices. The import for 2023 was 429,000 tonnes, a 15.6 per cent increase compared to 2022. A strong peso and competitive international prices drove up 2023 skim milk powder imports. Additionally, a strong demand for fluid milk for social programs boosted skim milk powder imports. Milk distributed through government-sponsored social programs are a mixture of skim milk powder and vegetable oils. The majority of skim milk powder used in Mexico is imported.

Dairy processors rely heavily on skim milk powder imports as a food ingredient for innovative and health food products, especially in urban areas. Skim milk powder provides processors with the flexibility to work with other ingredients to obtain lean, no sugar-added, extra-protein (fortified), grab-and-go food products and snacks to meet current consumer health trends.

Table 3. Mexican Imports of Milk Powder in 2019-2023 (in Canadian dollars)

Description	2019-2023		2019	2020	2021	2022	2023	CAGR
	\$	%	\$	\$	\$	\$	\$	%
Total	6,858,656,856	100.00	1,194,277,971	997,968,341	1,241,236,568	1,792,219,882	1,632,954,094	8.14
Skim milk powder (fat <= 1,5%)	6,683,674,036	97.45	1,169,063,707	978,373,459	1,208,382,660	1,741,581,574	1,586,272,636	7.93
Whole milk powder (fat > 1,5%, unsweetened)	171,361,502	2.50	22,120,586	19,322,152	32,780,023	50,546,460	46,592,281	20.47
Whole milk powder (fat > 1,5%, sweetened)	3,621,318	0.05	3,093,678	272,730	73,885	91,848	89,177	-58.80

Source: Global Trade Tracker March 2024

Table 4. Mexican imports of milk powder in 2019-2023 (in tonnes)

Description	2019-2023		2019	2020	2021	2022	2023
	tonnes	%	tonnes	tonnes	tonnes	tonnes	tonnes
Total	1,827,131	100.00	378,706	300,644	346,775	371,948	429,058
Skim milk powder (fat <= 1,5%)	1,788,352	97.88	372,647	295,689	338,850	362,393	418,772
Whole milk powder (fat > 1,5%, unsweetened)	37,440	2.05	5,030	4,809	7,905	9,475	10,220
Whole milk powder (fat > 1,5%, sweetened)	1,339	0.07	1,029	145	19	80	66

Source: Global Trade Tracker March 2024

⁶ Mexico's Dairy Demand to Grow in 2024 | Dairy Herd

During the period from 2019–2023, Mexico imported milk powder from 21 countries around the world. The U.S. is, by far, the largest supplier of Mexico, with 96.7 per cent in value of the total Mexican imports of milk powder, followed by New Zealand and Spain with 0.9 and 0.7 per cent, respectively. Completing the top 10 suppliers list are Uruguay, Poland, Canada, France, United Kingdom, Belgium, and Germany. Canada and Manitoba face solid competition with the U.S., as this country benefits from the shared border, logistics and proximity.

Table 5. Top 10 Global Milk Powder Suppliers to Mexico in 2019-2023 (in Canadian dollars)

Country	2019-2023		2019	2020	2021	2022	2023	CAGR
	\$	%	\$	\$	\$	\$	\$	%
World	6,858,656,852	100.00	1,194,277,970	997,968,341	1,241,236,566	1,792,219,881	1,632,954,094	8.14
United States	6,633,573,215	96.72	1,061,586,845	980,658,991	1,229,398,619	1,762,930,485	1,598,998,275	10.78
New Zealand	60,755,924	0.89	8,983,477	8,099,163	7,349,136	16,680,379	19,643,769	21.60
Spain	47,888,299	0.70	47,887,909	-	-	390	-	-97.99
Uruguay	25,375,611	0.37	4,315,509	2,147,755	3,392,723	6,532,029	8,987,595	20.13
Poland	23,484,984	0.34	23,484,984	-	-	-	-	-
Canada	21,049,934	0.31	6,782,378	2,729,898	734,594	5,561,476	5,241,588	-6.24
France	19,568,469	0.29	16,624,874	2,928,634	14,961	-	-	-97.00
United Kingdom	15,740,426	0.23	15,298,068	362,837	79,521	-	-	-92.79
Belgium	5,509,228	0.08	5,443,809	-	65,419	-	-	-89.04
Germany	2,106,785	0.03	2,039,862	64,869	2,054	-	-	-96.83

Source: Global Trade Tracker March 2024

Table 6. Quantity of Milk Powder Imported by Mexico in 2019-2023 with Top 10 Suppliers (in tonnes)

Country	2019-2023		2019	2020	2021	2022	2023
	tonnes	%	tonnes	tonnes	tonnes	tonnes	tonnes
World	1,827,131	100.00	378,706	300,644	346,775	371,948	429,058
United States	1,764,049	96.55	336,362	295,912	344,037	366,457	421,281
Spain	15,550	0.85	15,550	-	-	0	-
New Zealand	12,988	0.71	2,206	1,840	1,627	3,026	4,289
France	7,655	0.42	6,560	1,095	1	-	-
Poland	7,056	0.39	7,056	-	-	-	-
Uruguay	5,965	0.33	1,290	625	825	1,275	1,950
Canada	6,032	0.33	2,370	841	200	1,089	1,532
United Kingdom	4,353	0.24	4,259	72	22	-	-
Belgium	1,893	0.10	1,881	-	13	-	-
Germany	661	0.04	649	11	0	-	-

Source: Global Trade Tracker March 2024

In 2023, Canada was the fourth top exporter of milk powder to Mexico (Table 5), with \$5.2 million in export value, or 0.3 per cent of the country's total import value. During the same year, Canada sold 1,532 tonnes of milk powder to Mexico (Table 6). The hotel, restaurant and institutional sector is expected to further the demand for imported product into 2024.

As shown in Table 7, Manitoba already has a foothold in this market. It is the second top Canadian supplier of milk powder for the 2019 to 2023 period, accounting for 17 per cent of the Canadian exports in value to Mexico. Manitoba milk powder exports to Mexico showed an increase, with a CAGR of 20.8 per cent in the 2019–2023 period. Despite this encouraging CAGR figure, stiff competition from the U.S., New Zealand and Uruguay presents a challenge to capitalizing on the increased market potential that the Mexican milk powder market has shown in the last five years (Table 4).

Table 7. Canadian milk powder exports to Mexico in 2019-2029 (Canadian dollars)

Province	2019-2023		2019	2020	2021	2022	2023	CAGR
	\$	%	\$	\$	\$	\$	\$	%
Canada	21,049,934	100.00	6,782,378	2,729,898	734,594	5,561,476	5,241,588	-6.24
Quebec	12,645,796	60.08	4,623,874	1,897,898	734,594	3,234,829	2,154,601	-17.38
Manitoba	3,576,343	16.99	616,429	292,000	-	1,356,862	1,311,052	20.76
Ontario	3,409,703	16.20	123,983	540,000	-	969,785	1,775,935	94.54
Alberta	1,418,092	6.74	1,418,092	-	-	-	-	

Source: Global Trade Tracker March 2024

Table 8. Canadian Milk Powder Exports to Mexico in 2019-2029 (tonnes)

Province	2019-2023		2019	2020	2021	2022	2023
	tonnes	%	tonnes	tonnes	tonnes	tonnes	tonnes
Canada	6,032	100.00%	2,370	841	200	1,089	1,532
Quebec	3,682	61.04%	1,648	591	200	630	614
Ontario	939	15.56%	38	150	-	212	539
Manitoba	924	15.31%	197	100	-	247	380
Alberta	488	8.08%	488	-	-	-	-

Source: Global Trade Tracker March 2024

Mexican Milk Powder Exports

Mexican milk exports have remained quite stable at 1,000 tonnes since 2022 and are not expected to grow in 2024. A strong domestic demand forecast for 2024, limited production growth, and the exchange rate does not provide the context for export growth.

Skim milk powder exports from Mexico are price-driven and they are mainly limited to Central and South America. Competitive international commodity prices, as well as freight costs, push Mexico out of the export market.

Balance Between Imports and Exports

Mexico is currently a net importer of milk powder, as milk powder exports are negligible, and imports cover a high percentage of the demand.

Supply Chain Dynamics

The food supply chain is the most important one in the Mexican economy.⁷ It consists of farms, transport sector, industry, distribution, retailers and consumers, and accounts for 22 per cent of the national Gross Domestic Product (GDP). It generates 34 per cent of the total jobs in the country, with 5,000,000 families directly dependent on it.

The Mexican consumer prefers to buy in actual stores, rather than e-stores.⁸ Despite the drastic increase of e-commerce driven by the COVID-19 pandemic, the purchases in actual retail stores continue to grow, as consumers expect increased personalized service and a larger, faster, and satisfactory purchase experience. There are 31 supermarket chains with a combined 3,435 stores in Mexico. There are also 2,484 department stores and 62,377 specialized stores throughout Mexico. More than 56 per cent of the retail market is served by informal establishments (mobile street vendors and open public markets) which traditionally distribute local products. Retail sales in supermarkets grew steadily by 7.7 per cent in 2020.⁹

Canada-Mexico Trade Relations

Mexico is a priority market for Canada. The trade and investment relationship between Canada and Mexico has grown since the implementation of the North America Free Trade Agreement (NAFTA) in 1994. The Canada-U.S.-Mexico Free Trade Agreement (CUSMA) signed in 2018, ratified by the Mexican government in 2019, and entered into force on July 1, 2020, has adjusted the previous agreement to the realities of the 21st century. Canadian trade and investment with Mexico were at \$41.7 billion in two-way merchandise trade in 2021. Mexico is Canada's third largest single-country merchandise trading partner (after the U.S. and China). Canada was Mexico's sixth-largest merchandise trading partner in 2021. Canadian Direct Investment in Mexico was \$25 billion in 2021, which is Canada's ninth largest direct investment destination. Mexico's stability, growing consumer class and competitive labour continue to make it an attractive market for Canadian exports and investments.

Market Access Regulations

NAFTA¹⁰ eliminated virtually all tariffs between Canada and Mexico, with very few exceptions. CUSMA maintains the benefits of its predecessor to ensure trade will continue to be duty-free, with the additional modernization of customs procedures for the free flow of goods and the elimination of technical barriers to trade. CUSMA also preserves existing agriculture commitments between Canada and Mexico, while expanding opportunities for parties to address issues and trade barriers with the modernization of the Committee on Agriculture Trade. Under CUSMA, most Canadian agri-food products have duty-free access to Mexico, except for poultry, eggs, dairy and sugar. For skim milk powder (SMP) and milk protein concentrate (MPC) exports under this agreement, Canada implemented thresholds¹¹ and a charge of \$0.54 per kg when exceeding them or when exporter had not received an allocation. Exports below the threshold do not incur this charge. Canada agreed to a 35,000 tonnes of skim milk powder and milk protein concentrate export quota on a dairy-year basis (August to July), increasing by 1.2 per cent annually. An export permit is required for every shipment of skim milk powder.

Canada and Mexico are also signatories of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) which allows selected Canadian agri-food products with no preferential access under CUSMA, to be exported to Mexico duty-free, or with preferential duty, under country-specific permanent tariff rate quotas established by Mexico. These include milk powder, evaporated and condensed milk, butter, cheese and dairy-based preparations.

⁷ [Cadena de suministro alimentaria y sus tendencias \(thefoodtech.com\)](https://www.thefoodtech.com)

⁸ [Tiendas físicas, las preferidas para hacer compras en México \(thefoodtech.com\)](https://www.thefoodtech.com)

⁹ Mexican Association of Nationwide Retailers (ANTAD, 2020)

¹⁰ NAFTA – North America Free Trade Agreement

¹¹ Skim milk powder and milk protein concentrate export thresholds – Serial No. 993

Consumer Trends and Opportunities

As Mexico's population grows, milk powder imports continue to grow to address its increasing demand. Mexico's annual population growth rate is about 1.06 per cent¹² and its population is expected to peak at the end of 2062 with 157.2 million people. Mexico is clearly a net importer of milk powder, and it is highly dependent on it. Manitoba may continue supplying milk powder to Mexico and expanding its offer. The CUSMA and CPTPP agreements, combined with the \$27 billion merger between Canadian Pacific (CP) Railway and Kansas City Southern (KCS), are expected to open doors to producers and exporters of agri-food products and help access once inaccessible export destinations in Mexico.¹³

In addition to a growing population, another factor driving the Mexican milk powder market on an upward trajectory is industry efforts to encourage consumption of a wider range of dairy products beyond fluid milk. For example, the demand for milk and cream powder products in Mexico has increased at 18 per cent CAGR between 2019 and 2023. This is partly related to cheaper import prices compared to local ones¹⁴ as well as limited local processing capacity.

Convenience has also fueled the demand for milk powder in Mexico. Since it does not need to be refrigerated, milk powder is easy to store and has a longer shelf life. Forty-one per cent of Mexican consumers indicate they are willing to spend money to save time.¹⁵ The economic advantages of milk powder, such as reduced transportation costs and extended shelf life, make it an attractive choice for manufacturers who use skim milk powder as an ingredient. The Mexican food industry is strong and well-established, ranking 11th in the world and third in Latin America.¹⁶ It accounted for 7.6 per cent of the GDP in 2021¹⁷ and is expected to grow at a three per cent annual rate.¹⁸ In the dairy industry in particular, innovation contributes to its own popularity in various applications and formats and its focus on health.

Manitoba supplies Mexico with milk powder, with exports growing steadily (20.1 per cent CAGR) in the last five years and showing opportunities to expand exports in this category. The market size and expansion in Mexico, makes it an attractive destination for international exports.

It is important to acknowledge that Canada's dairy sector operates under a supply management system, which aims to balance production with domestic consumption while maintaining stable prices. Under this system, a national marketing agency determines production amounts for each dairy commodity and then sets production quotas for each province. Each farmer must hold a quota, which is basically a license that allows them to produce up to a predetermined amount. Therefore, the system prevents overproduction and maintains a balance between supply and demand. With limited milk production, processors have a narrow window to process surplus milk into milk powder for export. Milk production at the Canadian farms grew 3.9 per cent in the period 2019 to 2023, from 92.2 to 95.9 million hectolitres respectively.¹⁹ Manitoba dairy farms' milk production remained steady during the same period, reaching 4.1 million hectolitres per year.

¹² [Mexico Population 2023 \(Live\) \(worldpopulationreview.com\)](https://www.worldpopulationreview.com)

¹³ Canada West Foundation – March 2023

¹⁴ [Mexico's dairy sector remains resilient - Dairy Global](#)

¹⁵ Euromonitor Voice of the Consumer: Lifestyles Survey 2022

¹⁶ Euromonitor – March 2023

¹⁷ Instituto Nacional de Estadística y Geografía (Mexico)

¹⁸ Secretaría de Economía de México

¹⁹ Provincial Milk Boards and Agencies.

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List of Importers

[Powder Milk Importers and Buyers List in Mexico | Mexico Importers Directory of Powder Milk](#)

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