

Agri-Food Opportunities for Manitoba in the Mexican Market



April 10, 2026



Table of Contents

Executive Summary	4
Key Demographics and Economic Indicators	4
Consumer Trends	5
Mexico's Top Global Agri-food Imports	5
Manitoba's Top Agri-Food Exports to Mexico	7
Pork	8
Processed Potatoes	9
Canola Seeds	9
Canola Oil	10
Wheat	10
Dried Beans	10
Edible Offal	11
Cereal Groats, Meal and Pellets	11
Oats	12
Opportunities	13
Key Contacts	14
References	14

MEXICO

Executive Summary

Mexico remains a priority export market for Manitoba's agri-food sector, offering both scale and sustained growth opportunities across animal protein, oilseeds, grains, and value-added foods. In 2025, Mexico ranked as Manitoba's fourth-largest agri-food export destination, with exports valued at approximately \$648 million, supported by strong trade frameworks and close geographic proximity.

Mexico's agri-food imports expanded rapidly between 2021 and 2025, reaching \$62.4 billion and growing at a 9.6 per cent compound annual growth rate (CAGR). Demand growth has been concentrated in animal proteins, processed foods, and key feed and food ingredients – areas where Manitoba is well positioned as a dependable supplier.

This report examines Mexico's agri-food import trends and assesses Manitoba's current positioning across major product categories, including pork, canola (seed and oil), wheat, processed potatoes, pulses, edible offal, and specialty grains. It highlights areas of strong growth, mature but strategic markets, and emerging opportunities, providing an evidence-based perspective to support trade development.

Key Demographics and Economic Indicators¹

Country name: United Mexican States (Estados Unidos Mexicanos)

Head of State and Government: Claudia Sheinbaum

Government Type: Federal presidential republic

Capital: Mexico City

Legislature: Parliament (Upper and Lower House)

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

Economic indicators: Mexico has the world's 15th largest economy by nominal GDP (\$1.69 trillion).

Population: 126 million people (Census 2020)

GDP growth: 1.5 per cent (2024)²

GDP per capita: \$12,692 (2025 estimate)

GDP per capita rank: 74th (nominal, 2025 estimated)

Inflation: 4.2 per cent (2024)

¹ Wikipedia.org

² National Statistics Agency INEGI

Consumer Trends

Mexico's growing population, rising incomes, and evolving consumption patterns continue to support strong demand for imported agri-food products – particularly for canola, pork, wheat, and processed potatoes, of which Manitoba is a reliable supplier. With Mexico's population projected to increase over the long term³ and trade frameworks such as CUSMA⁴ and CPTPP⁵ ensuring preferential market access, Manitoba remains well positioned to expand its agri-food presence in this key market.

An expanding and increasingly urban middle class – estimated at 37 per cent of the population – is driving demand for higher-quality, healthier, and more convenient food products. Consumers are showing greater interest in foods with reduced sugar, added fibre, functional benefits, and plant-based attributes. Convenience continues to shape purchasing behaviour, supported by the widespread use of food delivery apps, online grocery platforms, and ready-to-prepare meal options. These trends align well with Manitoba's strengths in high-quality ingredients, specialty grains, and value-added food products.

Urbanization is further reinforcing these shifts. Approximately 82 per cent of Mexico's population now lives in urban areas, supporting the expansion of modern retail formats alongside traditional markets. Food retail sales exceeded \$109 billion in 2023, and growth is forecast to continue through 2029.⁶ As Mexican households allocate nearly 35 per cent of total spending to food, demand for meat, grains, and processed foods remains robust.

Mexico's food and feed processing sectors also present significant opportunities. As the second-largest food processor in Latin America, Mexico relies heavily on imported grains, oilseeds, and protein inputs due to limited domestic supply. Despite strong local livestock production, Mexico continues to depend on imports for about 22 per cent of its meat consumption, particularly poultry and pork, reinforcing demand for both feed inputs and finished products.

Mexico's Top Global Agri-food Imports

Mexico is a net exporter of agri-food products, yet its reliance on imports has increased steadily as domestic demand outpaces local supply in several key categories. In 2025, Mexico recorded \$79.8 billion in agri-food exports and \$62.4 billion in imports, resulting in a global trade surplus of \$17.4 billion. Over the 2021–2025 period, agri-food imports expanded by \$19.1 billion, growing at a strong 9.6 per cent CAGR as shown in Table 1.

Mexico's import growth is driven by three interrelated forces: rising demand for animal protein, sustained dependence on imported feed grains and oilseed inputs, and expanding consumption of processed and industrial food ingredients.

Animal protein imports recorded some of the fastest growth rates among all agri-food categories. Fresh hams increased by 19.3 per cent CAGR between 2021 and 2025, adding more than \$1.4 billion in import value. Fresh pork imports rose at a 15.2 per cent CAGR, while chicken frozen cuts and edible offal expanded even more rapidly, growing at 21.8 per cent CAGR and exceeding \$1.2 billion in 2025. Fresh boneless beef also showed strong momentum, increasing at 13.4 per cent CAGR.

Feed grains and oilseeds remain core components of Mexico's import profile, underpinning its intensive livestock and food manufacturing sectors. Corn was Mexico's single largest agri-food import, totaling \$37.1 billion between 2021 and 2025 and growing at an 8.5 per cent CAGR, with import values increasing by more than \$2.3 billion over the period. Soybeans and soybean oilcake remained stable, reflecting consistent demand for high-protein feed inputs. Milk and cream in solid forms also expanded steadily at a 5.2 per cent CAGR, highlighting ongoing reliance on imported dairy ingredients for food processing. Together, these inputs account for a substantial share of Mexico's agri-food imports and reflect long-term structural dependence rather than short-term market fluctuations.

Beyond staples and proteins, Mexico has increased imports of processed, semi-processed, and specialty food products, reflecting shifts toward convenience, urban lifestyles, and industrial food production. Between 2021 and 2025, cheese imports grew at a 14.3 per cent

³ Mexico Population 2023 (Live) (worldpopulationreview.com)

⁴ Canada–United States–Mexico Agreement

⁵ Comprehensive and Progressive Agreement for Trans-Pacific Partnership

⁶ Euromonitor International – Staples Foods in Mexico – January 2025

CAGR, nearly doubling over the period. Processed and frozen potatoes expanded at a 10.2 per cent CAGR, while food preparations grew at an 11.8 per cent CAGR.

High-growth categories also included soups and broths (22.3 per cent CAGR) and fructose and sweeteners (19.8 per cent CAGR), supporting beverage, bakery, and snack manufacturing. These trends signal increasing demand for imported ingredients and finished products that align with evolving consumer preferences and expanding food manufacturing capacity.

Table 1 – Mexican Top Global Imports of Agricultural and Agri-food Products (in Canadian Dollars)

Description	Total \$	%	2021	2022	2023	2024	2025	CAGR
	2021-2025		\$	\$	\$	\$	\$	%
Total	271,727,578,993	100	43,290,934,728	51,415,842,784	55,093,602,519	59,493,813,614	62,433,385,348	9.59
Corn	37,100,048,131	13.65	6,019,978,315	7,163,438,186	7,938,233,874	7,629,852,564	8,348,545,192	8.52
Soybeans	22,170,311,655	8.16	3,970,319,977	5,310,881,086	4,878,904,778	4,104,416,145	3,905,789,669	-0.41
Fresh hams	10,586,977,047	3.9	1,378,812,881	1,768,072,893	2,205,149,620	2,440,748,410	2,794,193,243	19.31
Wheat	10,184,626,459	3.75	1,956,701,444	2,432,463,435	2,189,644,781	1,814,990,203	1,790,826,596	-2.19
Milk and cream in solid forms	7,485,458,374	2.75	1,208,382,660	1,741,461,533	1,587,295,480	1,470,654,621	1,477,664,080	5.16
Food preparations	7,012,505,673	2.58	1,153,417,722	1,219,907,683	1,228,889,114	1,611,088,541	1,799,202,613	11.76
Fresh bovine meat, boneless	6,900,029,543	2.54	1,080,978,632	1,039,502,730	1,366,494,348	1,627,862,421	1,785,191,412	13.36
Soya-bean oilcake	5,663,495,551	2.08	1,053,382,626	1,128,472,613	1,110,858,265	1,226,522,450	1,144,259,597	2.09
Canola seeds	4,915,622,781	1.81	1,113,987,512	1,221,076,189	1,083,915,824	652,610,997	844,032,259	-6.7
Chicken frozen cuts and edible offal	4,549,388,094	1.67	547,463,773	865,695,999	818,471,709	1,114,624,252	1,203,132,361	21.76
Brewing or distilling dregs and waste	4,230,167,888	1.56	793,698,414	945,387,746	911,627,184	870,845,515	708,609,029	-2.8
Chicken fresh cuts and edible offal	3,822,064,817	1.41	679,100,507	703,811,269	753,663,205	894,951,138	790,538,698	3.87
Cheese	3,766,832,176	1.39	536,236,953	734,650,988	697,026,258	884,953,539	913,964,438	14.26
Vegetable seeds, for sowing	3,144,592,079	1.16	506,880,525	568,523,190	652,825,462	651,390,961	764,971,941	10.84
Soups and broths	3,103,183,619	1.14	372,969,424	487,663,459	643,108,455	765,492,343	833,949,938	22.28
Fructose in solid form/fructose syrup	2,965,698,230	1.09	366,295,533	443,217,847	617,594,089	784,210,424	754,380,337	19.8
Potatoes (prepared/preserved)	2,740,525,879	1.01	411,078,519	475,228,654	586,707,286	662,218,384	605,293,036	10.16
Crude palm oil	2,734,123,775	1.01	456,910,499	579,628,708	566,371,988	584,906,301	546,306,279	4.57
Fresh pork	2,672,719,386	0.98	354,875,237	554,221,449	499,925,344	639,068,776	624,628,580	15.18
Malt (excl. roasted)	2,549,980,532	0.94	470,608,279	490,036,219	518,114,908	565,727,489	505,493,637	1.8

Source: Global Trade Tracker – February 2026

Manitoba's Top Agri-Food Exports to Mexico

Mexico is a key export destination for Manitoba's agri-food sector, supporting a broad range of primary and value-added products. In 2025, Manitoba exported approximately \$648 million in agriculture and agri-food products to Mexico (Table 2), making it the province's fourth-largest agri-food export market. Over the 2021–2025 period, Manitoba's agri-food exports to Mexico grew at a CAGR rate of one per cent, reflecting both strong gains in selected products and softening in others.

Manitoba's export profile to Mexico is highly concentrated but increasingly diversified. Pork emerged as the province's largest and fastest-growing export, with fresh and frozen pork exports valued at over \$149 million in 2025. Canola seeds and canola oil together accounted for approximately \$250 million, remaining foundational to Manitoba's export relationship with Mexico despite recent volatility. Wheat exports totaled \$51 million, while processed potato exports reached a record \$54 million in 2025.

Animal protein has become the primary growth engine in Manitoba's exports to Mexico. Fresh pork recorded a 20.4 per cent CAGR between 2021 and 2025, increasing by nearly \$66 million over the period. By 2025, pork alone represented 23 per cent of Manitoba's total agri-food exports to Mexico, reflecting strong alignment with Mexico's expanding demand for imported protein.

Table 2 – Manitoba's Exported Products to Mexico in Canadian Dollars

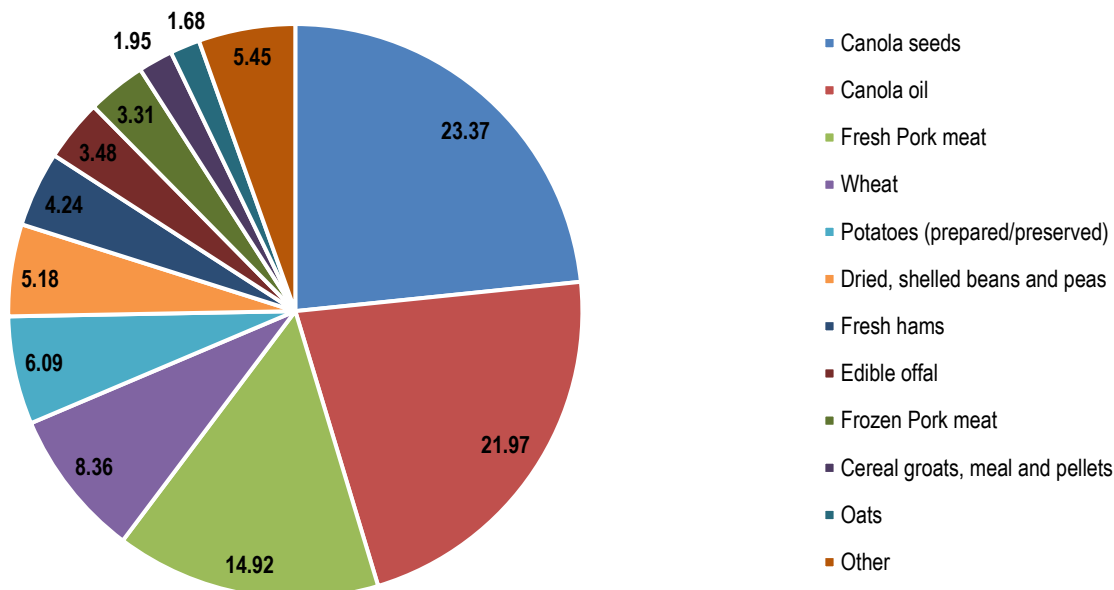
Description	Total \$ 2021-2025	%	2021 \$	2022 \$	2023 \$	2024 \$	2025 \$	CAGR %
Total	2,971,398,646	100.00	623,636,742	645,734,166	554,888,721	498,836,706	648,302,311	0.97
Canola seeds	694,445,090	23.37	184,340,001	209,003,921	126,634,892	64,163,365	110,302,911	-12.05
Canola oil	652,795,936	21.97	178,644,245	187,888,934	80,627,459	66,194,936	139,440,362	-6.01
Fresh pork	443,353,506	14.92	60,024,188	77,742,123	61,932,004	117,748,589	125,906,602	20.35
Wheat	248,260,746	8.36	44,783,357	48,043,878	62,484,569	42,025,726	50,923,216	3.26
Potatoes (prepared/preserved)	180,954,802	6.09	22,989,035	33,838,282	27,388,265	42,666,053	54,073,167	23.84
Dried, shelled beans and peas	153,830,553	5.18	11,661,874	7,875,157	45,367,491	52,055,003	36,871,028	33.35
Fresh hams	125,923,938	4.24	89,170	1,073,722	61,338,330	29,848,113	33,574,603	340.50
Edible offal	103,279,843	3.48	30,635,554	14,520,825	18,378,174	19,236,151	20,509,139	-9.55
Frozen pork	98,375,660	3.31	26,770,911	29,745,591	7,909,534	10,734,436	23,215,188	-3.50
Cereal groats, meal and pellets	57,865,389	1.95	23,158,707	14,322,924	10,171,689	3,864,691	6,347,378	-27.64
Oats	49,858,517	1.68	7,584,288	-	10,171,906	18,776,750	13,325,573	15.13

Source: Global Trade Tracker – February 2026

Beyond pork, Manitoba has seen notable growth in pulses and processed foods, signaling a gradual shift toward a more diversified export basket. Exports of dried, shelled beans and peas increased by more than \$36 million between 2021 and 2025, posting a 33.4 per cent CAGR. Prepared and frozen potato exports rose by over \$31 million (23.8 per cent CAGR), supported by expanding food service and retail demand in Mexico. Oat exports also recovered strongly following a dip in 2022, reaching \$13.3 million in 2025 and growing at a 15.1 per cent CAGR over the five-year period.

As a result of these trends, the composition of Manitoba's exports to Mexico has shifted. Animal proteins and by-products increased their share from 18.8 per cent in 2021 to 31.3 per cent in 2025, while the combined share of canola seeds and oil declined from 58.5 per cent to 38.5 per cent. This evolution reflects both changing market conditions and Manitoba's increasing participation in higher-growth product categories.

Graph 1 – Manitoba’s Agri-food Products Exported to Mexico in Percentage (2021 to 2025)



Source: Global Trade Tracker – February 2026

Pork

Pork⁷ represents one of the strongest and most strategically important growth opportunities in the Mexican agri-food market. Mexico's pork imports expanded rapidly between 2021 and 2025, reaching \$4.1 billion in 2025 and posting a CAGR of 19.7 per cent. This growth reflects rising per-capita consumption, population growth, and continued expansion of Mexico's food service and processing sectors.

The United States (U.S.) remains the dominant supplier, accounting for over 84 per cent of Mexico's pork imports by value. Canada ranked second with an 11.8 per cent share, supplying \$450 million in 2025. Within Canada, Manitoba plays a significant role, representing 43 per cent of Canadian pork exports to Mexico and accounting for approximately 4.7 per cent of total Mexican pork imports in 2025.

Manitoba's pork exports to Mexico recorded a strong CAGR of 22.1 per cent between 2021 and 2025, outpacing overall Canadian export growth and closely tracking Mexico's expanding import demand. Within Manitoba's pork exports, fresh pork and fresh hams accounted for the bulk of gains, with CAGRs of 20.4 per cent and 340.5 per cent, respectively. This growth was supported by rising demand for higher-value cuts and Mexico's increased reliance on imported supply to help stabilize domestic prices.

Recent policy developments have further shaped competitive dynamics. Mexico's renewal of zero import tariffs on selected basic food products, including pork, has facilitated increased participation by emerging suppliers such as Brazil. While this has intensified competition, it has also underscored Mexico's structural dependence on imports to meet domestic demand.

Table 3 – Top Suppliers of Pork to Mexico in Canadian Dollars

Country	Total \$ 2021-2025	%	2021 \$	2022 \$	2023 \$	2024 \$	2025 \$	CAGR %
World	15,503,866,404	100.00	2,002,729,817	2,669,864,501	3,126,384,533	3,596,627,379	4,108,260,174	19.68
United States	13,064,062,098	84.26	1,697,265,303	2,269,794,226	2,684,189,849	3,034,697,267	3,378,115,453	18.78
Canada	1,832,303,938	11.82	292,989,813	353,070,465	332,061,408	404,022,907	450,159,345	11.33
Brazil	495,522,594	3.20	-	1,701	95,142,283	139,926,846	260,451,764	5249.84

Source: Global Trade Tracker – February 2026

⁷ Includes pork meat and hams, whether fresh, chilled, or frozen.

Processed Potatoes

Processed potatoes represent a high-growth, value-added opportunity in the Mexican market. Mexico imported \$605 million worth of processed potatoes in 2025, with imports expanding at a 10.2 per cent CAGR between 2021 and 2025 (Table 4). Growth has been driven by rising urbanization, expansion of quick-service restaurants, and increasing demand for convenient, frozen, and ready-to-prepare foods.

The U.S. remains the dominant supplier, accounting for 76.8 per cent of Mexico's imports by value. Canada ranked second with an 11.3 per cent share, followed by Belgium and the Netherlands. Despite growing European competition, Mexico continues to rely heavily on North American suppliers due to logistic efficiency, product consistency, and established commercial relationships.

Manitoba plays a central role within Canada's supply. Between 2021 and 2025, Manitoba accounted for 58.7 per cent of Canadian processed potato exports to Mexico. Manitoba's exports posted a strong 23.8 per cent CAGR, outpacing overall import growth and underscoring the province's competitiveness in this segment.

Table 4 – Top Suppliers of Processed Potatoes to Mexico in Canadian Dollars

Country	Total \$ 2021-2025	%	2021 \$	2022 \$	2023 \$	2024 \$	2025 \$	CAGR %
World	2,740,525,877	100.00	411,078,518	475,228,653	586,707,287	662,218,384	605,293,035	10.16
United States	2,103,407,743	76.75	357,389,478	377,407,472	456,242,376	507,234,359	405,134,058	3.18
Canada	308,454,147	11.26	31,057,099	49,037,443	56,478,742	70,090,904	101,789,959	34.55
Belgium	248,007,121	9.05	18,373,849	38,125,073	55,474,155	70,981,956	65,052,088	37.17
Netherlands	34,541,960	1.26	2,069,211	7,028,962	12,257,375	6,402,060	6,784,352	34.56

Source: Global Trade Tracker – February 2026

Canola Seeds

Canola seeds remain a strategic input commodity within Mexico's agri-food and feed complex. Between 2021 and 2025, Mexico imported approximately \$4.9 billion worth of canola seeds. While total import values declined over the period, resulting in a -6.7 per cent CAGR, import volumes remained relatively stable, fluctuating between one- and 1.2-million tonnes.

Canada has historically been Mexico's dominant supplier of canola seeds, accounting for 84.1 per cent of total import value between 2021 and 2025 (Table 5). However, Canada's exports experienced a decline over the period (-10.7 per cent CAGR), reflecting a combination of global price movements, and the emergence of Australia as a competing supplier beginning in 2022.

Manitoba plays a significant role within Canada's export base, contributing more than 14 per cent of Mexico's total canola seed imports during the five-year period. Manitoba's exports mirrored broader Canadian trends, declining at a -12 per cent CAGR between 2021 and 2025. Despite this contraction, Canada and Manitoba specifically remains Mexico's most reliable supplier.

From a demand perspective, Mexico's intensive livestock sector and food manufacturing industry continue to depend on imported oilseeds and protein meals. Canola's nutritional profile and versatility position it as a complementary input alongside soybeans and corn within Mexico's feed and crushing industries.

Table 5 – Top Suppliers of Canola Seeds to Mexico in Canadian Dollars

Country	Total \$ 2021-2025	%	2021 \$	2022 \$	2023 \$	2024 \$	2025 \$	CAGR %
World	4,917,205,312	100.00	1,114,283,517	1,221,483,800	1,084,522,508	652,686,024	844,229,463	-6.70
Canada	4,136,732,787	84.13	1,113,896,517	1,171,612,506	749,016,598	394,683,676	707,523,490	-10.73
Australia	570,385,499	11.60	-	49,244,466	324,711,323	196,429,710	-	99.72
United States	209,429,986	4.26	350,144	595,803	10,402,632	61,572,638	136,508,769	344.35

Source: Global Trade Tracker – February 2026

Canola Oil

Canola oil remains a strategic but more mature opportunity within Mexico's edible oil market. In 2025, Mexico imported \$481 million worth of canola oil. Over the 2021–2025 period, imports grew at a modest 2.1 per cent CAGR, with value fluctuating largely in response to global price movements rather than volume demand.

Canada is the dominant supplier, accounting for 69.7 per cent of total import value over the five-year period. The U.S. and the Netherlands followed as secondary suppliers. Manitoba contributed nearly 20 per cent of Canada's canola oil exports to Mexico in 2025, although provincial exports declined over the period. Despite recent softness, Mexico's reliance on imported vegetable oils and its growing food manufacturing sector continue to underpin structural demand for canola oil as a high-quality, versatile input.

Table 6 – Top Suppliers of Canola Oil to Mexico in Canadian Dollars

Country	Total \$ 2021-2025	%	2021 \$	2022 \$	2023 \$	2024 \$	2025 \$	CAGR %
World	2,282,229,724	100.00	442,473,455	538,905,512	446,531,477	373,564,590	480,754,690	2.10
Canada	1,590,853,915	69.71	313,316,455	435,977,769	284,996,981	164,614,122	391,948,588	5.76
United States	397,690,419	17.43	101,310,048	76,369,680	106,276,046	31,724,778	82,009,867	-5.15
Netherlands	158,409,528	6.94	2,521,948	22,801	36,130,151	113,895,565	5,839,063	23.35

Source: Global Trade Tracker – February 2026

Wheat

Wheat remains a strategic staple commodity within Mexico's food and feed system, supporting both human consumption and food processing industries. In 2025, Mexico imported approximately \$1.8 billion worth of wheat. Over the 2021–2025 period, total import values softened slightly, reflecting a –1.7 per cent CAGR, largely driven by price volatility.

The U.S. continues to dominate Mexico's wheat imports, supplying nearly 80 per cent of total import value. Canada ranked second with a 13 per cent market share, posting a five per cent CAGR. Russia and France also emerged as episodic suppliers.

Manitoba plays a meaningful role within Canada's wheat exports to Mexico. In 2025, Manitoba supplied \$51 million worth of wheat, accounting for 12.3 per cent of Canadian exports to the Mexican market. Mexico's large and growing population, combined with limited domestic wheat production, continues to underpin structural import demand. As food consumption and processing expand, wheat imports remain essential to food security and price stability.

Table 7 – Top Suppliers of Wheat to Mexico in Canadian Dollars

Country	Total \$ 2021-2025	%	2021 \$	2022 \$	2023 \$	2024 \$	2025 \$	CAGR %
World	10,247,768,307	100.00	1,958,728,767	2,434,336,610	2,195,041,988	1,831,219,161	1,828,441,781	-1.71
United States	8,127,578,831	79.31	1,622,097,908	2,052,382,184	1,457,190,183	1,435,872,613	1,560,035,943	-0.97
Canada	1,335,518,613	13.03	220,934,163	252,877,123	348,674,377	244,627,117	268,405,833	4.99
Russian Federation	600,645,032	5.86	10,884,542	113,023,250	338,638,570	138,098,670	-	133.23
France	84,606,111	0.83	44,917,313	15,949,157	11,118,880	12,620,761	-	-34.50
Ukraine	59,999,737	0.59	59,894,841	104,896	-	-	-	-99.82

Source: Global Trade Tracker – February 2026

Dried Beans

Dried beans represent a rapidly expanding and increasingly competitive market in Mexico, aligned with both traditional consumption patterns and modern food processing demand. Between 2021 and 2025, Mexico's dried bean imports totaled \$2.2 billion, growing at a robust 10.9 per cent CAGR and reaching \$422 million in 2025.

The U.S. remained the leading supplier, accounting for 72.7 per cent of total imports (Table 8). Canada ranked second with an 18.6 per cent market share, nearly doubling export values over the five-year period. Within Canada, Manitoba is a key contributor, representing 43.2 per cent of Canadian dried bean exports to Mexico in 2025.

While North America continues to dominate supply, emerging exporters such as Argentina and Brazil recorded rapid growth, indicating increasing diversification among suppliers. Despite this, Canada's geographic proximity, consistent quality, and established trade relationships continue to support strong positioning in the Mexican market.

Table 8 – Top Suppliers of Dried Beans to Mexico in Canadian Dollars

Country	Total \$ 2021-2025	%	2021 \$	2022 \$	2023 \$	2024 \$	2025 \$	CAGR %
World	2,171,188,259	100.00	278,883,530	217,670,285	542,443,345	709,721,729	422,469,370	10.94
United States	1,578,475,520	72.70	224,241,961	159,770,486	394,333,676	506,253,616	293,875,781	6.99
Canada	404,283,949	18.62	46,307,148	47,536,415	110,463,171	114,652,834	85,324,381	16.51
Argentina	75,028,468	3.46	1,421,608	2,602,430	25,426,687	29,361,721	16,216,022	83.78
Brazil	50,721,505	2.34	-	-	1,718,450	39,796,030	9,207,025	131.47
China	37,776,041	1.74	3,809,945	1,856,139	5,583,685	12,318,811	14,207,461	38.96
Australia	11,530,392	0.53	1,948,171	1,130,583	1,796,564	3,326,536	3,328,538	14.33
India	9,959,578	0.46	759,197	3,986,636	2,160,220	3,053,525	-	59.03

Source: Global Trade Tracker – February 2026

Edible Offal

Edible offal represents a consistently expanding protein segment within Mexico's agri-food import profile. Between 2021 and 2025, Mexico imported \$3.4 billion worth of edible offal, growing at a 10.8 per cent CAGR and reaching \$844 million in 2025.

The U.S. is the dominant supplier, accounting for 75.1 per cent of total import value, followed by Canada with a 16.4 per cent share (Table 9). Canadian exports showed moderate growth over the period, reflecting stable demand for offal products across retail, food service, and processing channels. Manitoba is a notable contributor within Canada's export base, representing 16.6 per cent of Canadian edible offal exports to Mexico in 2025.

Table 9 – Top Suppliers of Edible Offal to Mexico in Canadian Dollars

Country	Total \$ 2021-2025	%	2021 \$	2022 \$	2023 \$	2024 \$	2025 \$	CAGR %
World	3,441,767,380	100.00	560,493,076	564,222,872	700,401,122	772,804,241	843,846,069	10.77
United States	2,584,358,879	75.09	411,992,603	417,125,659	530,231,984	581,443,467	643,565,166	11.80
Canada	564,706,567	16.41	110,837,481	102,391,092	113,061,771	114,546,399	123,869,824	2.82

Source: Global Trade Tracker – February 2026

Cereal Groats, Meal and Pellets

Cereal groats, meal and pellets represent a smaller but structurally important feed and food ingredient segment within Mexico's agri-food imports. Between 2021 and 2025, Mexico imported \$275 million worth of these products (Table 10). Import values fluctuated during the period, resulting in a -0.8 per cent CAGR, reflecting variability in feed demand and substitution among grains.

The U.S. is the leading supplier, accounting for 66.8 per cent of total imports and posting a strong 10 per cent CAGR. Canada ranked second with a 32.8 per cent share but experienced declining export values over the period. Manitoba accounted for \$57.9 million of

Canada's exports between 2021 and 2025, although provincial exports declined significantly from \$23.1 million in 2021 to \$6.3 million in 2025. Smaller suppliers included Italy, Guatemala, and France.

Despite recent softness, cereal groats and meal continue to play a role in Mexico's livestock and food processing systems, particularly during periods of grain substitution or price volatility.

Table 10 – Top Suppliers of Cereal Groats, Meal and Pellets to Mexico in Canadian Dollars

Country	Total \$ 2021-2025	%	2021 \$	2022 \$	2023 \$	2024 \$	2025 \$	CAGR %
World	274,685,682	100.00	55,176,546	48,446,972	59,998,993	57,585,140	53,478,031	-0.78
United States	183,347,119	66.75	28,011,199	31,903,025	41,519,710	40,953,801	40,959,384	9.97
Canada	90,201,133	32.84	27,035,565	16,434,600	18,263,096	16,341,246	12,126,626	-18.16
Italy	709,376	0.26	50,306	78,165	138,444	255,541	186,920	71.90
Guatemala	175,785	0.06	-	557	22,148	-	153,080	550.16
France	152,217	0.06	22,785	21,306	32,362	26,048	49,716	21.54

Source: Global Trade Tracker – February 2026

Oats

Oats have emerged as a fast-growing niche opportunity within Mexico's agri-food import profile. Between 2021 and 2025, Mexico imported \$323 million worth of oats, expanding at a 25.9 per cent CAGR, one of the highest growth rates among Manitoba-relevant commodities.

Canada dominated the market with a 59.2 per cent share, followed by Australia and the U.S. Although Canadian shipments experienced volatility during the period, they rebounded strongly in 2023 and 2024. Manitoba contributed \$49.9 million in oat exports to Mexico over the five-year period, accounting for approximately 26 per cent of Canada's total exports. Manitoba's export pattern closely mirrored national trends, with particularly strong performance in 2024.

Table 11 – Top Suppliers of Oats to Mexico in Canadian Dollars

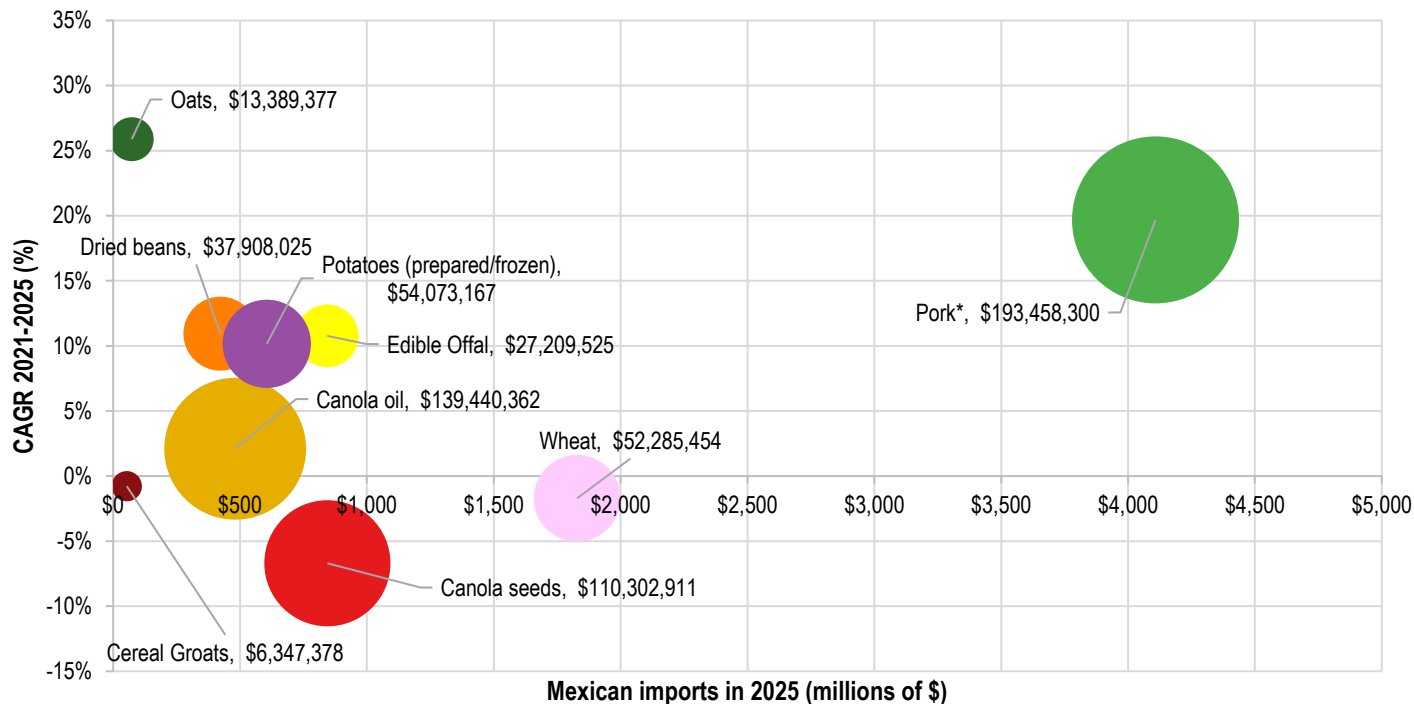
Country	Total \$ 2021-2025	%	2021 \$	2022 \$	2023 \$	2024 \$	2025 \$	CAGR %
World	322,699,806	100.00	29,064,102	59,642,506	73,400,698	87,615,248	72,977,252	25.88
Canada	191,142,564	59.23	27,301,253	85,073	35,245,770	78,250,047	50,260,421	16.48
Australia	83,408,992	25.85	-	49,057,439	34,351,553	-	-	-29.98
United States	21,625,219	6.70	1,762,849	605,978	3,803,375	9,365,201	6,087,816	36.32
Sweden	16,629,015	5.15	-	-	-	-	16,629,015	
Chile	9,882,099	3.06	-	9,882,099	-	-	-	
United Kingdom	11,916	0.00	-	11,916	-	-	-	

Source: Global Trade Tracker – February 2026

Graph 2 shows Mexican imports of selected agri-food products in 2025 (value) in relation to their associated growth for 2021–2025, highlighting differences in market size and growth dynamics across product categories. The Y-axis shows the CAGR rate (2021–2025), the X-axis represents Mexico's import values in 2025, and the size of each bubble reflects Manitoba export value to Mexico.

Most of Manitoba's major export categories grew during this period, showing strong import demand that Manitoba can meet. Products combining strong growth rates with large import values highlight areas where Manitoba can deepen commercial relationships, leverage competitive advantages, and pursue new partnerships. While cereal groats, canola seeds, and wheat show declining trends, the broader pattern of expanding categories suggests substantial scope for Manitoba to strengthen and diversify its agri-food export portfolio in the Mexican market.

Graph 2 – Manitoba’s Positioning Matrix – Growth (2021-2025) vs. Market Size



Note: Pork* – Includes pork meat and hams, whether fresh, chilled, or frozen.

Source: Global Trade Tracker – February 2026

Opportunities

Strong import growth in several agri-food categories, combined with Manitoba’s established supplier position and expanding market share, highlights a set of priority opportunities in the Mexican market.

Pork and processed potatoes emerge as top-tier opportunities, characterized by both large market size and sustained growth. Mexico’s rising pork imports, together with Manitoba’s expanding share and established commercial relationships, position the province to increase export volumes, move into higher-value product segments, and deepen long-term partnerships. Similarly, sustained growth in Mexico’s processed potato imports, supported by Manitoba’s dominant share of Canadian supply and strong recent export performance, creates opportunities to expand volumes and strengthen participation in Mexico’s food service and retail processing channels.

A second group of opportunities reflects **high-growth, emerging markets**, particularly pulses and oats. Rapid growth in Mexican dried bean imports, combined with Manitoba’s significant share of Canadian exports, supports opportunities to expand market presence, develop long-term buyer relationships, and target both traditional and value-added pulse applications. Mexico’s fast-growing oat imports, alongside Canada’s leading supplier position and Manitoba’s substantial contribution, further highlight opportunities linked to health-oriented foods, breakfast products, and food processing uses.

Several **longer-term opportunities** persist despite recent market softening. While import values for canola seed, canola oil, and wheat have moderated, Mexico’s structural reliance on imported oilseeds, vegetable oils, and wheat, suggest continued relevance for Manitoba exporters. As market conditions stabilize, Manitoba is well positioned to defend market share, respond to renewed demand, and leverage its reliability, scale, and reputation as Mexico seeks secure and diversified suppliers for its food processing and milling sectors.

Additional **niche opportunities** include edible offal and cereal-based feed inputs. Strong growth in Mexico’s edible offal imports, combined with Manitoba’s established role within Canada’s supply base, supports further volume. Although short-term growth in cereal groats, meal, and pellets has weakened, Mexico’s large feed sector and ongoing need for diversified grain inputs suggest potential for Manitoba to stabilize and selectively re-engage as demand conditions evolve.

Key Contacts

Embassy of Canada in Mexico / Canadian Trade Commissioner Service

Schiller 529

Col. Polanco

Mexico City, 11560

Mexico

Tel: 011-52 55 5724-7900

Fax: 011-52 55 5724-7982

Email: mexico.commerce@international.gc.ca

ANIERM – Asociación Nacional de Importadores y exportadores de la República Mexicana

Monterrey No. 130

Col. Roma Norte Del. Cuauhtémoc

Mexico City, 06700

Mexico

Tel: 011-52-55-5584-9522

Email: info@anierm.org.mx

List of Importers

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

References

www.tradecommissioner.gc.ca

www.thefoodtech.com

www.wikipedia.org

www.worldbank.org

www.statista.com

www.tasteatlas.com

www.trademap.org

www.agr.gc.ca

www.nationsencyclopedia.com

www.nationmaster.com

www.canada.ca

www.usda.gov

www.anierm.org.mx

www.cwf.ca

Others:

Catsnet

Euromonitor

Global Trade Tracker

Contact us

www.manitoba.ca/agriculture/

1-844-769-6224

industryintelligence@gov.mb.ca

Available in alternate formats upon request