

Mexico Fruits and Vegetables Sector - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 100 pages | Mordor Intelligence

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Report description:

The Mexican fruits and vegetable market is projected to register a CAGR of 2.3% during the forecast period (2022-2027). As Mexico is one of the key exporters of these commodities to the United States, import volume experienced a slight decline during the pandemic. Texas is the largest port of entry of fresh produce from Mexico. There was a reduction in produce imports of 4.1% in February and 1.6% in March compared to the same months in 2019. Later on, as these commodities were deemed to be essential, the efforts of the public and private sectors in both countries to ensure this cross-border relationship overcame the supply disruptions caused by the pandemic.

Tomatoes, bananas, chili peppers, oranges, lemons, limes, mangos, and avocados are some of the commonly grown fruits and vegetables in Mexico. The growth of the fruits market in Mexico is driven by various public and private initiatives to increase agricultural production. For instance, Fortune Growers, a fresh produce company based in Elgin, Illinois, partnered with the Mexican government to strengthen the growth of Mexican produce. The company, with its latest initiative, is working closely with small and medium-sized growers across Mexico by creating logistical methods that would increase trade and facilitate growth.

Further, orange was the most consumed fruit in Mexico in 2019, with an average per capita consumption of 37.2 kg. Lime ranked second with a per capita consumption of 15.1 kg, followed by banana and mango. Among vegetables, green chili was the most consumed legume or vegetable in 2019, with an average per capita consumption of 16.9 kg, followed by potato and tomatoes.

Fruits and vegetable consumption in the country had declined over the years, as fruit and vegetable-based foods were being replaced with modern self-service stores boosting consumption of soda and instant soups. Hence, there is a need for better marketing campaigns to boost the consumption of fresh and locally produced fruits and vegetables, which are not only cheaper but also help local growers increase their business.

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The climatic advantages that allow the country to produce fruits and vegetables year-round and increased demand from the United States are the prime drivers of the market studied.

Mexico Fruits & Vegetables Market Trends

Oranges and Tomatoes Dominate the Sector

According to the Food and Agriculture Organization, production of primary fruits and vegetables in 2020 was 23.8 million metric ton and 15.1 million metric ton, respectively. The production of citrus fruits in the same year stood at 8.9 million metric ton. Oranges and tomatoes are the leading commodities in the fruits and vegetable sector. The country produced 4.65 million metric ton of oranges and 4.14 million metric ton of tomatoes in 2020.

Tomatoes are produced in Mexico year-round, with a fall/winter cycle and a spring/summer cycle stretching over 18 months an agricultural year (AY), from October to March (plus one year). Protected agriculture is increasingly prevalent throughout the country, especially among the farms and enterprises that rely on the export market. Tomato production in Mexico is highly concentrated, with Queretaro, Coahuila, Nuevo Leon, and Puebla having the highest tomato yields due to increased adoption of protected agriculture technologies, like green and shade houses and irrigation systems. For example, Sinaloa, which grows Roma tomatoes (saladette) in an open field with yields of about 37 MT/ha, can grow the same tomato varieties under protected agriculture with yields ranging from 87 to 200 MT/ha.

Climate variation in the country, from tropical to temperate, allows growers to produce a wide variety of fruits and vegetables. About 20% of Mexico's fruit and vegetable production is exported, while the vast majority goes to the large and growing domestic market.

While non-citrus fruits are produced in the more temperate states of Michoacan, Chihuahua, Durango, Zacatecas, and Sonora, the citrus production occurs in Veracruz, Colima, Michoacan, San Luis Potosi, Oaxaca, and Sonora. Thus, favorable Mexican weather, expanding cultivation of protected agriculture, and high export demand for those commodities, especially from the United States, are some of the reasons for high production in Mexico.

United States - Major Exporting Partner

The United States is the top exporting partner of Mexico, whose main competitive advantage is climate. Three-fourths of the US fresh vegetable imports are from Mexico. Most fresh Mexican vegetables arrive in the United States during the winter months, when there is little production of the same commodities except in Florida. The value of the total imports of agricultural products from Mexico was USD 28 billion in 2019. Leading categories include other fresh fruits (USD 6.9 billion) and fresh vegetables (USD 6.3 billion),

Mexican farmers invest in protected culture structures, including greenhouses that protect plants from erratic weather and pests, thereby facilitating the production of organic produce and extending crop seasons, enabling the year-round supply of fresh vegetables. Americans are willing to pay a premium for greenhouse-grown and often organic vegetables, and Mexican farmers are investing in protected culture structures to exploit this high-value market.

Avocadoes, limes, strawberries, raspberries, and grapes are some of the fruits exported to the United States, whereas bell peppers and tomatoes are the main vegetables exported. The trade agreement, NAFTA, and Mexico's proximity to the United States are prime reasons for such huge exports to the United States. Other prominent trade partners include Canada, Chile, Argentina, and Spain.

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During the 2019-2020 season, tomatoes led the export at about USD 2.1 billion, with most of the exports going to the United States, with bell peppers at around USD 600 million, followed by other peppers and cucumbers. Avocados were the most exported fruit at about USD 1.9 billion, followed by walnuts at around USD 600 million and limes.

Mexico Fruits & Vegetables Market Competitor Analysis

Additional Benefits:

The market estimate (ME) sheet in Excel format
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