

## **Mexico Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029**

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### **Report description:**

The Mexico Foodservice Market size is estimated at 90.43 billion USD in 2024, and is expected to reach 138.81 billion USD by 2029, growing at a CAGR of 8.95% during the forecast period (2024-2029).

Quick service restaurants are dominating the market due to their affordable price ranges

- Quick service restaurants held the largest market share in the Mexican foodservice market in 2022. The segment registered a CAGR of 9.19% by value during the study period. This is because fast food options are considered more affordable meal-purchasing options in Mexico. The average order value in Mexican quick service restaurants was USD 5.15, while the same value was USD 9.51 and USD 10.43 in cafes & bars and full service restaurant segments, respectively.

- A major challenge for the quick service restaurants segment in Mexico is the ban on fast-food sales to minors imposed by various state governments in the country. For instance, more than 50 jurisdictions in Mexico have imposed taxes on sugar-sweetened beverages during the past ten years, discouraging consumers from purchasing hazardous items. This strategy is aimed at and expected to stop 239,000 cases of obesity, almost 40% of which will occur in children. The states of Oaxaca and Tabasco passed restrictions on the sale of sugary bottled drinks and high-carbohydrate snacks in 2020, and many more states are expected to follow.

- The Mexican cloud kitchen market is projected to grow and register a CAGR of 13.41% by value during the forecast period. The market is expected to continue its rapid growth due to continual funding by venture capitalists, private equity firms, and angel investors toward the new entrants in the market. Unlike other markets in the region, the Mexican cloud kitchen market is highly fragmented, with the top 10 chains holding only around 5% share of the market. Therefore, chained cloud kitchens are projected to register a CAGR of 15.58% by value during the forecast period.

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## Mexico Foodservice Market Trends

Quick service restaurants are Mexico's most popular dining options, with Burger King, O'Tacos, McDonald's, and Starbucks leading the pack.

- The quick service restaurants segment has the major share of the market in Mexico. About 47.43% of customers prefer quick service restaurants when dining outside. Burger King is positioned as the favorite quick service restaurant of Mexicans, followed by McDonald's, Starbucks, Subway, KFC, and Domino's Pizza. Quick service restaurant operators are introducing plant-based meats to the menu, as these products tend to perform well in a taco or nacho application with lots of flavors and spices that make it harder to discern plant-based meat from traditional meat.
- The full service restaurants segment holds the second major share in the market. As of November 2021, the State of Mexico had the largest number of restaurants, with roughly 74,400 establishments. Middle Eastern cuisine is the fastest growing in the region. Lebanese is the largest community of foreigners to arrive in Mexico, with over 500,000 people. Lebanese specialties, such as hummus, pita, and falafel, have been adapted to the menu and spices, like harissa, cardamom, and za'atar, are also likely to be introduced.
- The cloud kitchen segment is the fastest-growing segment, and it is projected to register a CAGR of 5.99% during the forecast period. Cloud kitchens are becoming increasingly popular due to the pandemic. The pandemic has just fast-forwarded the trend that was already in place. As restaurants shut down, the importance of saving capital necessitated the switch to cloud kitchens. While some operators solely set up their business as cloud kitchens, some shifted to hybrid models. Cloud kitchens rely on technology to serve their customers. Hence, effective offers and good customer service boost the growth of the cloud kitchen market.

### A wider variety of menu items and upscale dining experiences at full service restaurants in Mexico

- In Mexico, the average order was the highest among full-service restaurants in 2022, with a price of USD 14.11, since they provide a wider variety of menu items, an upscale dining experience, and decor, lighting, and music. Apart from Latin American cuisine, North American and Asian cuisines held the major shares in the full-service restaurant segment with 25% and 17.50%, respectively, in 2022. Orden de pastor and Al pastor are the major dishes offered by full service restaurants under the segment, and they are priced at USD 11 and USD 10 per plate.
- Average orders were high in quick-service restaurants due to their lower-priced menu items. The average order value for quick-service restaurants in Mexico increased by 10.64% during the study period. As they provide quick and easy food options for people, they are a popular option for many young people who prefer takeaway and home delivery due to busy schedules. The demand for quick service restaurants is expected to increase due to changes in consumer behavior and increasing e-commerce channel penetration.
- There has also been a recent trend of cloud kitchens in Mexico, and the sector has grown significantly during the pandemic. Cloud kitchens are proving to be beneficial due to their restaurant quality served in the safety and comfort of customers' homes. Thus, food startups such as Muy invested USD 15 million to expand in Mexico in 2019 and used AI to produce food based on

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demand forecasts. Also, the Colombian-based delivery app Rappi has been expanding rapidly in Mexico and recently launched its cloud kitchen concept, "Rappi Cloud," in 2020.

## Mexico Foodservice Industry Overview

The Mexico Foodservice Market is fragmented, with the top five companies occupying 1.91%. The major players in this market are Alsea SAB de CV, Arcos Dorados Holdings Inc., CMR SAB de CV, Grupo Gigante SAB de CV and Yum! Brands Inc. (sorted alphabetically).

### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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