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Mexico Plant-Based Food And Beverages - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Mexico Plant-Based Food And Beverages Market Analysis

The Mexico plant-based foods and beverages market was valued at USD 4.28 billion in 2025 and estimated to grow from USD 4.67 billion in 2026 to reach USD 7.19 billion by 2031, at a CAGR of 9.02% during the forecast period (2026-2031). As flexitarian diets gain traction, NOM-051 clean-label regulations come into play, and nearshoring investments surge, the pace of product innovation, domestic manufacturing, and omnichannel distribution quickens. Ingredients like amaranth and chia, rooted in tradition, are being woven into modern formulations that honor cultural significance and align with contemporary nutritional science. Thanks to cold-chain enhancements by major retailers and logistics firms, secondary cities are seeing a broader product assortment, breaking down long-standing access barriers. Venture capital is pouring into alternative protein start-ups, and retailers are increasingly pushing private labels, leading to competitive pricing and a more prominent shelf presence. With the federal Plan Mexico program promoting supply-chain localization, there's a promising outlook: reduced reliance on imported proteins, stabilized input costs, and bolstered long-term growth for the category.

Mexico Plant-Based Food And Beverages Market Trends and Insights

Government nutritional labelling (nom-051) favouring clean labels

NOM-051 mandates front-of-package warnings for foods high in calories, sodium, sugar, and fats. Plant-based dairy and meat substitutes, often sidestepping these warnings, gain prime shelf space and consumer trust due to their perceived health benefits and regulatory compliance. In 2024, authorities immobilized 15 non-compliant beverages, underscoring the strict enforcement and non-negotiable nature of the regulations. This strict approach signals to manufacturers the importance of adhering to the guidelines to avoid penalties and reputational damage. Brands adeptly formulating to dodge warnings not only fortify their position in domestic aisles but also enhance their allure in North American export markets, where clean labels and regulatory compliance are increasingly valued. This regulation has catalyzed industry-wide reformulations, steering research and development towards simpler ingredients and reduced sodium content, which align with evolving consumer preferences for healthier options. Looking ahead, compliance with NOM-051 is poised to shift from a distinguishing factor to a standard expectation, pushing slower manufacturers to swiftly update their legacy products to remain competitive and relevant in the market.

Expansion of domestic flexitarian consumer base

Survey data indicates that more than half of shoppers in Mexico are actively looking for plant-based alternatives. This trend is particularly pronounced among millennials and Gen Z, especially in metropolitan areas, where dietary preferences are rapidly evolving. Mexicans, already familiar with plant-forward staples like quelites, nopales, and legumes, are now embracing modern alternatives such as plant-based dairy and meat substitutes. This shift broadens the market's reach, extending beyond just vegan and vegetarian consumers to include a growing number of flexitarians. Flexitarian shoppers, who tend to have higher disposable incomes, show a readiness to invest in premium, novel SKUs, making this segment highly lucrative for manufacturers. Urbanization, coupled with increasing levels of tertiary education, solidifies this dietary shift by fostering greater awareness of health and sustainability benefits associated with plant-based diets. As flexitarianism spreads to secondary cities, companies that adapt their taste profiles to resonate with regional cuisines stand to gain significant volume, all while minimizing marketing expenses and leveraging local culinary preferences.

Price premium versus animal products

At retail, plant-based items are priced 30-50% higher than their animal counterparts, limiting their trial among cost-sensitive households. This price disparity makes it challenging for these products to gain traction in markets where affordability is a key purchasing factor. Economic challenges often lead consumers to opt for cheaper staples, such as cooking oils and spreads, further impacting the adoption of plant-based alternatives. In response, retailers are introducing value-driven private-label ranges to cater to budget-conscious consumers, while start-ups are streamlining formulations to reduce ingredient costs without compromising product quality. With nearshored production and Plan Mexico incentives on the horizon, scale efficiencies are expected to follow, potentially lowering costs over time. However, for now, the premium positioning of many SKUs restricts them to affluent urban areas, limiting their reach in the mass market and slowing broader adoption.

Other drivers and restraints analyzed in the detailed report include:

Retail chains' private-label push for plant-based SKUsRising dairy allergies and lactose-intolerance awarenessSupply-chain dependence on imported pea and soy concentrates

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

In 2025, plant-based dairy dominated Mexico's plant-based food and beverage market, accounting for 42.63% of total sales. This dominance is largely attributed to the country's high lactose intolerance rates, prompting many consumers to turn to dairy alternatives. Additionally, compliance with NOM-051 labeling standards has smoothed the path for market entry. Producers of plant-based dairy often emphasize clean labels and functional ingredients. Within the plant-based dairy realm, milks lead in retail volume, while yogurts and creamers have found their way into traditional Mexican dishes. This adaptability has led to a growing trend of households swapping conventional dairy for almond, oat, or soy alternatives in both cooking and snacking. Looking ahead, the strong retail presence of plant-based dairy, combined with its appeal to health-conscious consumers, suggests it will continue to thrive, even as competition intensifies.

Forecasts indicate that the meat substitutes segment will be the fastest-growing in Mexico's plant-based sector, with an anticipated CAGR of 10.57% through 2031. The surge is fueled by the rising presence of plant-based burgers, tacos, and other comfort foods in fast-casual and quick-service restaurant menus. This heightened visibility has normalized meat-free dining, broadening its appeal from niche vegan circles to a larger flexitarian audience. Manufacturers are turning to pea protein formulations, prized for their nutritional balance, texture, and adaptability to local seasonings. Innovations tailored to Mexican tastes, like the use of authentic spices, herbs, and regional chiles, are bolstering consumer acceptance and loyalty. With urban consumers increasingly seeking protein-rich yet sustainable options, meat substitutes are set to outpace other plant-based categories, buoyed by robust foodservice backing and growing home consumption.

The Mexico Plant-Based Foods and Beverages Market Report is Segmented by Product Type (Plant-Based Dairy, Meat Substitutes, Plant-Based Nutrition/Snack Bars, Plant-Based Bakery Products, Plant-Based Beverages, Other Food and Beverages), Protein Source (soy, Almond, Pea, Oat, Wheat, Rice, and More), and Distribution Channel (On-Trade, Off-Trade). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Units).

List of Companies Covered in this Report:

Unilever Plc JBS Foods Planterra Foods Danone SA NotCo Fazenda Futuro Conagra Brands Inc Beyond Meat Inc Heura Foods Heartbest Foods Nestle SA Grupo Bimbo SAB de CV Sigma Alimentos (Better Balance) Kellogg Company Impossible Foods Inc Oatly Group AB Califia Farms LLC The Tofurky Company LLC Amys Kitchen Inc Maple Leaf Foods Inc (Lightlife & Field Roast) Upfield BV (Violife) Good Planet Foods LLC

Additional Benefits:

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

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