



Coffee in Mexico

November 2025

Table of Contents

Coffee in Mexico - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Increased prices hit volumes, but demand becoming more sophisticated

INDUSTRY PERFORMANCE

Coffee price increases constrain volume growth

Growing interest in higher quality coffee

WHAT'S NEXT?

Climate change may slow down coffee sales growth in coming years

Premiumisation driven by rising consumer sophistication

Product innovation is likely to drive sales of coffee mixes

COMPETITIVE LANDSCAPE

Nestlé Mexico dominates coffee sales

Bia Foods adopts price discount policy to reinforce competitive position

CHANNELS

Small local grocers leads coffee sales

Discounters gaining relevance through competitive pricing

CATEGORY DATA

Table 1 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 2 - Retail Sales of Coffee by Category: Value 2020-2025

Table 3 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 5 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 6 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 7 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 8 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 9 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 10 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 11 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Hot Drinks in Mexico - Industry Overview

EXECUTIVE SUMMARY

Budget consciousness and evolving health awareness

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

More consumers looking to prepare hot drinks at home

Weather conditions influencing consumption patterns and pricing

Health concerns hit other hot drinks

WHAT'S NEXT?

Tensions with the US

Adapting to changing climatic conditions

Evolving health concerns present ongoing challenge

COMPETITIVE LANDSCAPE

Nestlé dominates

Nestlé amongst the fastest-growing players

CHANNELS

Small local grocers is the leading channel

Discounters extending geographic reach

Foodservice vs retail split

MARKET DATA

Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 13 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 14 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 15 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 16 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 17 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 18 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 19 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 20 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 21 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 22 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 23 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 24 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 25 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 26 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 28 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 29 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 30 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 32 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 34 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 35 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 36 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.

- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/coffee-in-mexico/report.