

# okra

## MEXICO 2026+

### SEVEN FORCES RESHAPING FOOD & BEVERAGE

From Plant-Based Mainstream to AI-Driven Nutrition  
A Strategic Roadmap for Brands



# THE GREAT RECALIBRATION



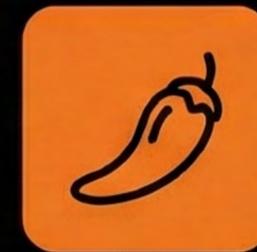
**51%**

of Mexican consumers shifted to healthier eating post-pandemic.



**+213%**

growth in delivery services — now a standard expectation.

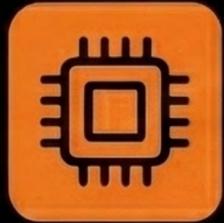


**\$714M**

projected plant-based market value by 2030.

Temporary pandemic behaviors became permanent consumer expectations. What started as adaptation is now the baseline.

# SEVEN FORCES RESHAPING THE INDUSTRY



## Technology

Digital commerce, AI nutrition, automation.  
**Emerging → Growing.**



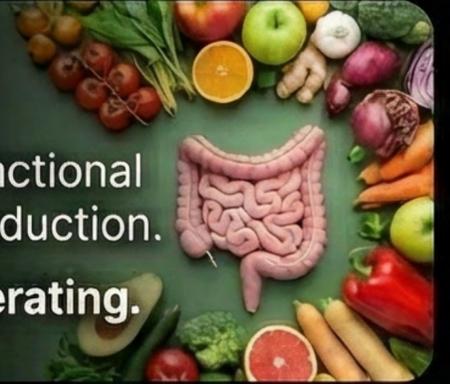
## Sustainability

Plant-based, zero waste, regenerative ag.  
**Growing → Mature.**



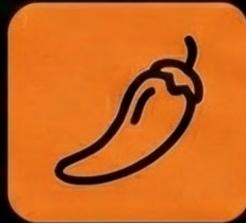
## Health

Clean label, functional foods, sugar reduction.  
**Mature, Accelerating.**



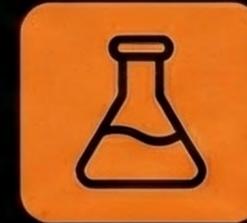
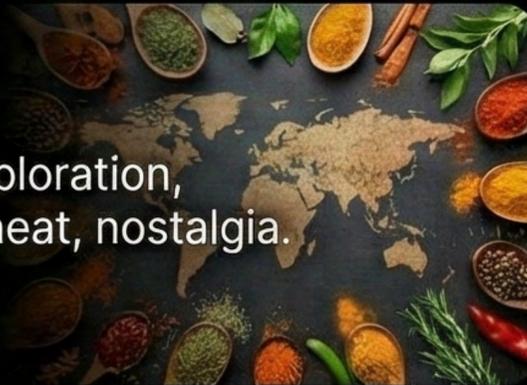
## Market

Value seeking, tribal segments, D2C models.  
**Mature, Adaptive.**



## Flavor

Global exploration, extreme heat, nostalgia.  
**Growing.**



## Science

Cultured proteins, precision fermentation.  
**Emerging.**



## Convenience

Ready-to-eat, instant delivery, on-the-go.  
**Ubiquitous.**



These seven forces are not isolated trends; they are the interconnected drivers of the entire food system's transformation."

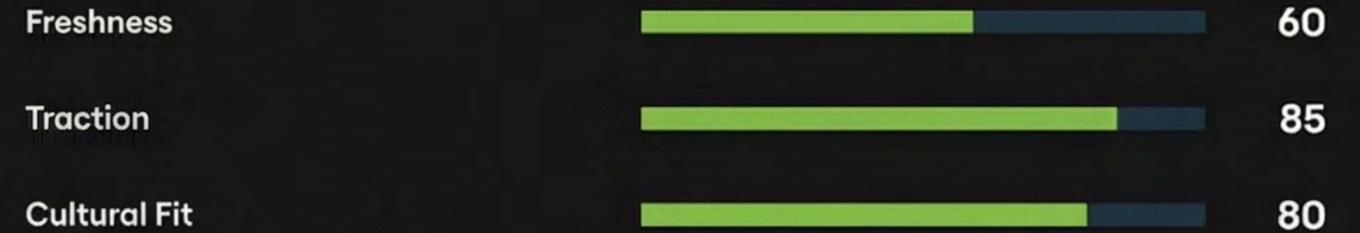
# PLANT-BASED: FROM NICHE TO NATIONAL

## What It Is

- Substitutes or reduces animal products with plant proteins (soy, pea, wheat)
- Spans all categories: meats, dairy, eggs, now in mainstream retail
- Driven by flexitarians, not just vegans – reducing, not eliminating

## Why Now

Mexico’s rich tradition of plant-based cuisine (nopal, frijol, amaranth) creates cultural fit. Mandatory front-of-pack labels push consumers toward perceived healthier options. Environmental awareness hits mainstream consciousness.



Proliferation Stage

## Evidence Snapshot

Mexico represents ~2% of global vegan market, growing 10%+ annually. Projected to reach \$714M by 2030. Mexico leads Latin America in plant-based adoption.



**Brand Implication: If you don't have a plant-based SKU by Q2 2025, you're late. This is no longer experimental – it's table stakes.**

# THE CLEAN LABEL IMPERATIVE



## What It Is

Artisanal chips are often defined by short ingredient labels, simple production formats, nutritious, minimal, and have a **clean brand-printed finish**.



## Why Now

More than a mere motivation, ingredient orientation is becoming no longer just a competitive advantage.



## Evidence Snapshot

- **Transparency** is now a fast change asset and share gain by **20%**.
- **Products** that share clear information are favored in the segment.
- **Compensation** for in-process artificial ingredients and labeling.
- **Effective** at handling retail price and sparks new accounts.



Transparency is no longer a differentiator — it's the baseline expectation."

**BRAND IMPLICATION:  
REFORMULATE YOUR TOP 5  
SKUs IMMEDIATELY. THIS IS  
COMPETITIVE SURVIVAL.**

# DELIVERY-FIRST COMMERCE

## What Changed



E-commerce penetration in grocery reached critical mass



Dark stores and ghost kitchens became infrastructure



Quick-commerce promises delivery in minutes, not hours



Urban consumers expect food at their door within 30 minutes



95%

Traction Score

Ubiquitous

Evolution Stage



**Brand Implication:** Brands without seamless digital ordering and rapid fulfillment are invisible to urban consumers under 40.

# Three Strategic Waves

From immediate wins to long-term signals — how to sequence your innovation agenda



## 12 Months

### Quick Wins

Act now on established trends with proven traction. Reformulate, launch entry products, optimize digital channels.

## 24 Months

### Mid-Term Disruptions

Pilot emerging innovations with growing signals. Test hybrid products, circular packaging, D2C models. First-mover advantage window.

## 36 Months

### Long Signals

Monitor weak signals that could become disruptions. Cultivated proteins, nutrigenomics, novel ingredients. Build strategic options.

# Product Innovation Agenda

## Immediate



### Clean Label Reformulation

Strip artificial additives. Reduce sugar, sodium, saturated fat. Simplify ingredient lists.



### Plant-Based SKU

Launch at least one plant protein alternative in your core category.



### Functional Fortification

Add probiotics, fiber, vitamins to existing products without compromising taste.

## Mid-Term



### Hybrid Products

Blend animal and plant proteins for better taste, nutrition, and sustainability.



### Upcycled Ingredients

Turn production by products into value-added ingredients or stand alone products.



### Regional Flavors

Rescue traditional Mexican ingredients and regional recipes in modern formats.

## Long-Term



### Precision Fermentation

Explore microbial proteins, animal-free dairy proteins, and molecular gastronomy.



### Personalized Nutrition

Modular platforms allowing customization based on dietary needs or DNA profiles.



### Novel Ingredients

Insect protein, algae, cultivated cells integrated as cost-effective, sustainable options.

# Format & Channel Strategy

## Format Innovation



### Sustainable Packaging

Transition to recyclable, compostable, or refillable materials. Start with hero products for maximum visibility.



### Portion Control & On-the-Go

Single-serve, resealable, pocket-friendly formats for convenience-driven lifestyles. Think breakfast-to-desk, gym-to-office.



### Value Formats

Offer bulk and club-sized options for inflation-conscious shoppers. Balance with premium small-batch editions for different segments.

## Channel Evolution



### Omnichannel Mastery

Seamless experience across physical retail, e-commerce, and delivery apps. Unified inventory, consistent pricing, smart fulfillment.



### Direct-to-Consumer Pilots

Test subscription models for specialty products. Own the customer relationship. Capture data for product development.



### Specialized Retail

Ensure presence in health stores, bulk retailers, and emerging formats like zero-waste shops. Different channels = different consumers.

# Brand & Storytelling Imperatives



## Radical Transparency

Share ingredient origins, production methods, environmental impact. Make data accessible via QR codes. Consumers trust what they can verify.



## Purpose Beyond Product

Define a social or environmental mission that goes beyond profit. Younger consumers expect brands to contribute to solutions, not just sell products.



## Heritage Meets Innovation

Celebrate Mexican culinary traditions while innovating boldly. Nostalgia for authentic flavors coexists with appetite for the new.



## The Three Hs:

**Health. Heritage. Honesty.**

These three pillars define winning brand narratives in Mexico 2025+. Build your story around them.

TREND REPORT 2026 +

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# Trends don't win. **Products do.**

Mexican consumers are recalibrating their relationship with food. Health isn't optional. Sustainability isn't niche. Convenience isn't a premium feature. These are baseline expectations.

7

Megatrends Reshaping  
Agenda

3

Time Horizons for Strategic  
Action

∞

Opportunities for Brands Who  
Move First

Brands that act with velocity on these trends—reformulating products, embracing plant-based, mastering digital commerce, committing to transparency—will define the next decade. Those who wait will be playing catch-up in a market that has already moved on.

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