

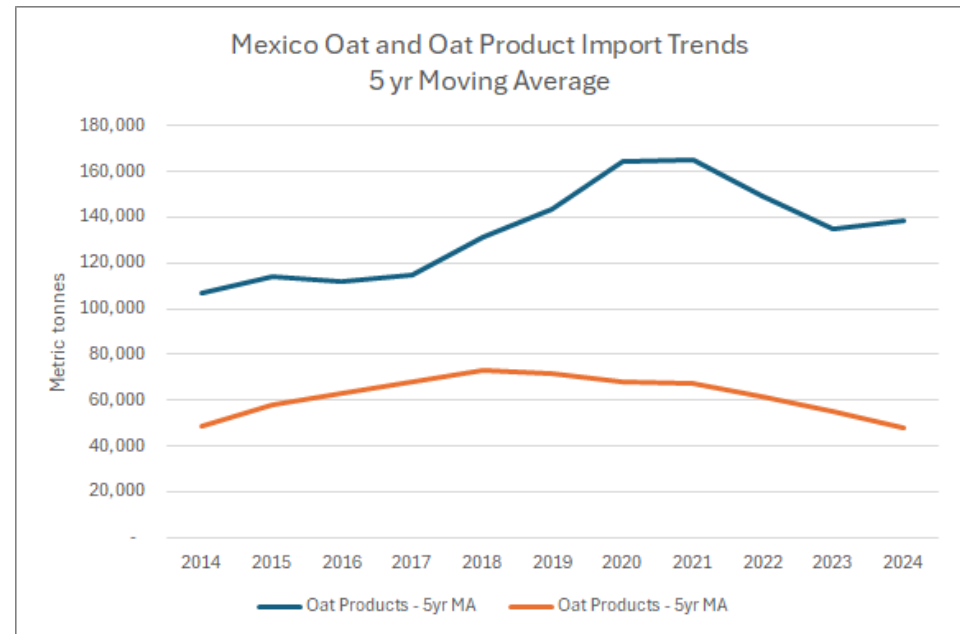
Global Oat Market Weekly Highlights

- Chile Poised for Record-Breaking Oat Exports in 2025, Driven by Strong Regional and Emerging Global Market Growth Global oat prices continue ease most lower as wheat, corn and barley price easing lower.
- Dry Spring Hampers UK Spring Oat Prospects: Winter Oats Hold Up Better Amid Mixed Recovery Said AHDB June 2025 Crop Report'
- 2025 U.S. Oat Production Estimated Lower on Trend Yields, but Favorable Crop Conditions Point to Potential Upside.
- Western Europe and Western Canada remain the primary focus of global oat markets, with persistent heat and dryness raising concerns over potential yield losses if meaningful rainfall does not arrive soon.
- Global oat price update: UK and Germany Lead Weekly Oat Price Gains as Manitoba Faces Steep Monthly Drop

Mexico Reshapes Oat Supply Chain: Shift from Processed Imports to Raw Canadian Grain Signals Rise in Domestic Processing

Mexico's oat import landscape is undergoing a significant transition, marked by a sharp decline in processed oat product imports and a resurgent reliance on raw oat grain, particularly from Canada. This structural realignment suggests a deeper shift in how Mexico sources, processes, and consumes oats—potentially signaling the emergence and expansion of local milling capacity, a more vertically integrated industry, and a supply strategy built around cost sensitivity, domestic value capture, and market adaptability.

Through the first four months of 2025, processed oat product imports (e.g., flakes and groats) fell to just 4,172 metric tonnes, a 36.8% drop from the same period in 2024 and nearly 69% below the five-year average (see table pg.). This marks a continuation of a multi-year downtrend that began post-2021, with particularly sharp reductions from Chile (-68.3%) and the United States (-20.1%). Even Canada, still Mexico's top processed oat supplier, recorded a 22.7% decline in shipments. The five-year CAGR for oat product imports now stands



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Mexico Oat Imports

Mt	Jan-Dec									YTD (Jan-Apr)			
	2020	2021	2022	2023	2024	5 yr avg	5 yr CAGR	5 yr avg chg	% of total	2025	2024	Chge	MT Chge
Total	220,176	129,889	55,798	115,918	124,575	129,271	-10.8%	-2.4%	100.0%	44,866	4,355	930.1%	40,511
Australia	-	28,276	-	-	-	5,655		-80.2%	4.4%	-	-	0.0%	0
Canada	212,533	96,526	-	12,150	118,807	88,003	-11.0%	0.9%	68.1%	42,558	1,933	2101.4%	40,625
Chile	-	-	-	-	-	-		-100.0%	0.0%	-	-	0.0%	0
Dominican Republic	-	-	-	-	-	-		0.0%	0.0%	-	-	0.0%	0
Finland	148	-	-	-	-	30	-100.0%	0.0%	0.0%	-	-	0.0%	0
Unidentified	-	-	55,798	102,189	-	31,597		0.0%	24.4%	-	-	0.0%	0
United States	7,495	5,087	-	1,578	5,768	3,985	-5.1%	-66.6%	3.1%	2,308	2,422	-4.7%	-114

at -20%, reflecting a consistent erosion in demand for processed imports.

In contrast, raw oat grain imports appeared to surge in early 2025, totaling 44,866 Mt from January to April—up a striking 930% from the same period in 2024 (see table above). However, this year-to-date comparison should be viewed with caution, as shipments tend to show high month-to-month variability, and large single-month deliveries can distort short-term trends. That said, the increase is still notable—driven almost entirely by Canada, whose shipments rose from just 1,933 Mt to 42,558 Mt.

This divergence between raw and processed oat imports reflects a strategic pivot in Mexico's oat supply chain. These trends are further supported by five-year moving average data: while processed oat product imports peaked in 2018–2019 and have declined steadily since—falling below 55,000 Mt in the latest 5-year average—raw oat imports peaked around 2020–21 and have since stabilized in the 135,000–140,000 Mt range, with the 2024–25 rebound suggesting renewed strength (see chart pg. 1).

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Mexico Oat Product Imports

Mt	Jan-Dec									YTD (Jan-Apr)			
	2020	2021	2022	2023	2024	5 yr avg	5 yr CAGR	5 yr Avg Chg	% of total	2025	2024	Chge	MT Chge
Total	61,905	59,602	37,034	36,123	20,319	42,997	-20.0%	-15.3%	100.0%	4,172	6,599	-36.8%	-2,427
Canada	54,021	52,883	17,041	18,036	13,021	31,000	-24.8%	-10.5%	88.7%	2,967	3,839	-22.7%	-872
Chile	2,762	2,382	6,434	1,884	5,139	3,720	13.2%	-33.9%	4.0%	657	2,074	-68.3%	-1,417
Unidentified	-	28	11,627	14,029	-	5,137		0.0%	0.0%	-	-	0.0%	0
United States	4,991	4,279	1,932	2,174	2,159	3,107	-15.4%	-55.3%	7.2%	549	687	-20.1%	-138



Key Forces Behind the Shift:

- **Cost Sensitivity:** Mexico is a highly price-sensitive market, and raw Canadian oats offer better landed economics than processed imports or higher-priced origins like Australia, whose oats are among the most expensive globally and have disappeared from Mexican import flows since 2021.
- **Domestic Processing Investment:** The surge in raw oat imports suggests that Mexican food companies—especially in cereal, beverage, and bakery segments—are scaling up local processing, flaking, and co-packing operations to capture more value domestically.
- **Trade, Traceability & Logistics:** The disappearance of “unidentified” shipments and concentration of raw oat sourcing in Canada suggests a strategic return to formalized, compliant supply chains—likely driven by stricter traceability, sustainability claims, or food safety standards.
- **Vertical Integration & Maturing Industry:** The shift reflects a more sophisticated oat industry, with food and beverage manufacturers increasingly internalizing supply chains to control quality, cost, and innovation—reducing reliance on finished imports in favor of flexible raw inputs.

Strategic Implications:

- Canadian exporters are strongly positioned to benefit from Mexico’s evolving model, offering cost-efficient bulk oats.
- Processed oat exporters—particularly from Chile and the U.S.—face reduced demand unless they pivot to co-manufacturing partnerships, local packaging, or value-added specialty products.
- Australian exporters, already priced out of the raw oat market, may find limited opportunity unless targeting niche or premium health segments.



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- Randy Strychar