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U.S. DEPARTMENT OF AGRICULTURE

**Foreign Agricultural Service**
Global Market Analysis
International Production Assessment Division
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Commodity Intelligence Report

# Mexico Corn Production Recovering from Two Years of Drought

For the current marketing year (MY) 2025/26, USDA forecasts Mexico corn production at 26.0 million metric tons (mmt), up 12 percent from 23.2 mmt MY 2024/25 and 10 percent above MY 2023/24. Corn production is reliant upon the seasonal increase in rain that typically begins in June. However, in MY 2023/24, a drought began that negatively impacted Mexico's corn production (see Figure 1). The ongoing drought affected MY 2024/25 as well, while the intensity of the drought shifted to the northwest, the primary winter corn producing region. With the onset of the rainy season in June 2025 and above-average rainfall in key producing regions, corn production for MY 2025/26 is recovering from two years of drought.

Before the long-term drought began, corn production for Mexico had a 5-year average of 27.3 mmt (MY 2018/19 to MY 2022/23). Harvested area in MY 2023/24 dropped to 6.1 million hectares (mha) and USDA estimates MY 2024/25 at 6.5 mha and forecasts MY 2025/26 at 6.8 mha (see Figure 2).

Mexico has two agricultural seasons, summer (about 70 percent of annual corn production that is mainly rainfed), and winter (about 30 percent of annual production that is primarily irrigated). The summer corn crop is usually planted from April to August and harvested from October to January. The winter corn crop is usually planted from November to January and harvested from April to July (see Figure 3).

## Summer Corn

Summer corn is grown throughout Mexico and 85 percent rainfed. Major producers include the states west of Mexico City to Jalisco (see Figure 4). Mexico's Agri-Food and Fisheries Information Service (SIAP) provides advanced estimates monthly as they receive planting and harvest reports. As of October 31, 2025, SIAP reported that farmers had planted 5.8 million hectares (mha) of summer corn, slightly greater than the reported levels at this time last year. While summer corn planting typically runs through August, this year it was completed in late September.

The Bajío region covers parts of Jalisco, Guanajuato, and Michoacán, which make up the top producing states. Additional key rainfed states include the state of Mexico and Guerrero, while Chihuahua is a major producing state of irrigated and rainfed corn. Favorable weather supported the Bajío region, as indicated by cumulative precipitation data (see Figure 5). Seasonal rains began earlier than last summer and progressed above normal, supporting the summer corn crop during emergence and grain filling. In contrast, the onset of rain was delayed in 2023 and 2024. In 2023, when the rainy season finally began in late June and remained much lower than normal, farmers could not harvest all the corn planted, with an estimated 500,000 failed hectares due to the drought. This was the largest reported failed summer corn crop since 2011 and the fifth largest on record, according to SIAP. By 2024, with the ongoing drought, farmers were more conservative in planting corn while the rainy season began in mid-June and performed better than the previous year.

SIAP is not yet reporting significant production data for MY 2025/26, however the size of this crop allows USDA to leverage MODIS imagery to monitor yield potential and forecast production. The satellite-derived Normalized Difference Vegetation Index (NDVI) indicates better yield potential this season compared to the last two years (see Figure 6) for summer corn.

**Winter Corn**

The winter corn season typically accounts for 30 percent of annual production, with 68 to 72 percent from Sinaloa (see Figure 7). While planting only recently began in November, winter corn production is largely irrigated, especially in Sinaloa. So far this year, precipitation has reached the northwest (see Figure 8) and is refilling the reservoirs used for irrigation. As of early October, reservoir levels at the dams are at 47 percent this year compared to 31 percent the year before.

Sinaloa’s winter corn production depends on recharge of its reservoirs from the rainy season (June through October) and Pacific tropical storms when they reach the northwest. By reviewing multiple years of reservoir levels, the typical pattern observed is that low reservoir levels in late Spring are recharged after Summer. Sinaloa has eleven reservoirs used to supply water for human consumption and irrigation of crops. The latest four years of data show the reservoirs being recharged each year, except with the drought in 2023 reversing the relationship (see Figure 9). To compare sources and verify the reporting by the Mexican government, USDA uses satellite imagery to monitor key reservoirs that supply irrigation for corn fields. Some reservoirs show the September 2025 surface water extent larger than the last two years, while others show the surface water extent in September 2025 is larger than last year, but not as large as in September 2023 (see example in Figure 10).

For reservoirs in Sinaloa, the combined water levels in September 2025 are greater than those in September 2023 and September 2024. These higher reservoir levels are expected to increase water permits, supporting farmers in irrigating their crops. The State Plant Health Committee of Sinaloa (CESAVESIN) has authorized a planted area of 469,000 ha for irrigated corn in Sinaloa, supporting a more average national winter area. Winter corn production for MY 2025/26 is forecast to surpass 5.5 mmt. In comparison, MY 2024/25 winter corn completed harvest in late August 2025 and the severely drought-impacted production is estimated at 4.1 mmt, according to SIAP (see figure 11).

In summary, Mexico's combined summer and winter corn production has typically been greater than 26 mmt for the last 10 years, except for these past two years of drought. The final production estimate for MY 2023/24 is 23.7 mmt and the estimate for MY 2024/25 is 23.2 mmt. For MY 2025/26, farmers are actively harvesting summer corn and production for both seasons combined is forecast at 26.0 mmt. Despite this increase in the MY 2025/26 forecast, production remains below the 10-year average because of the previous two consecutive years of drought.

## References

Trejo, R. 2025. Mexico Grain and Feed Update. USDA Foreign Agricultural Service. GAIN Report, September 22, 2025. https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Grain%20and%20Feed%20Update_Mexico%20City_Mexico_MX2025-0048

Tetrault, R. and Jenkins, J. 2024. Mexico Crop Travel: Winter Corn in Sinaloa. USDA Foreign Agricultural Service. Commodity Intelligence Report (CIR), June 18, 2024. https://ipad.fas.usda.gov/highlights/2024/06/Mexico/index.pdf

Contributions to this report from the Office of Agricultural Affairs Mexico staff are very much appreciated.

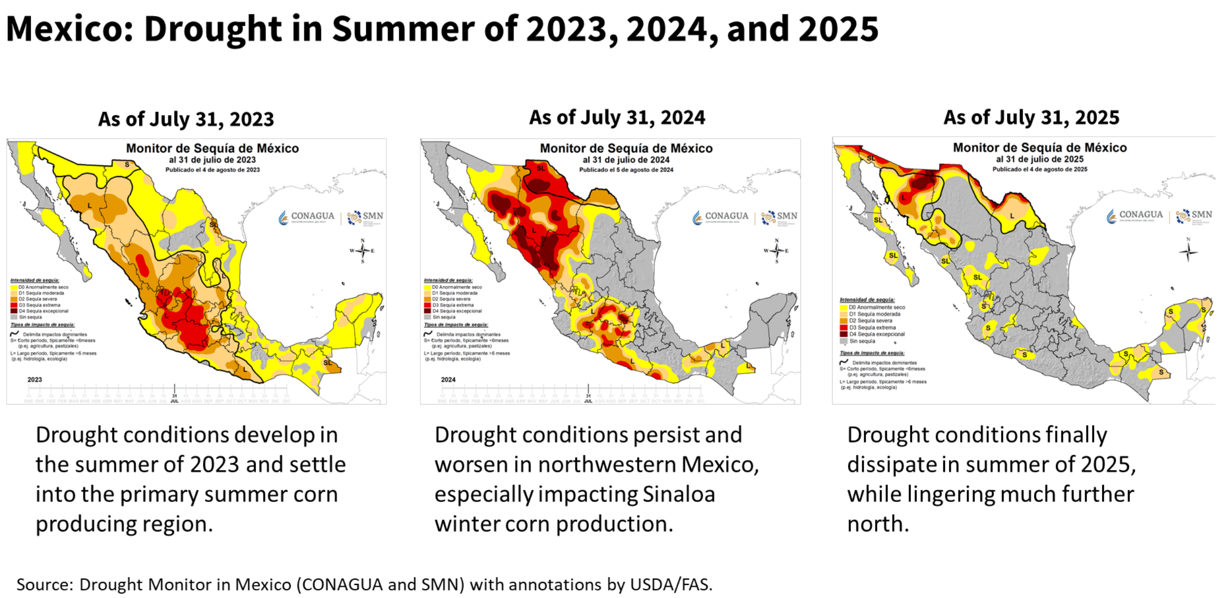



Figure 1. The drought monitor of Mexico is part of the North American Drought Monitor. Areas in medium and dark reds correspond to D3 and D4 drought conditions that can have negative consequences for agriculture. These images characterize the rainy season of each year. Source: *Comisión Nacional del Agua* (CONAGUA), *Monitor de Sequía*

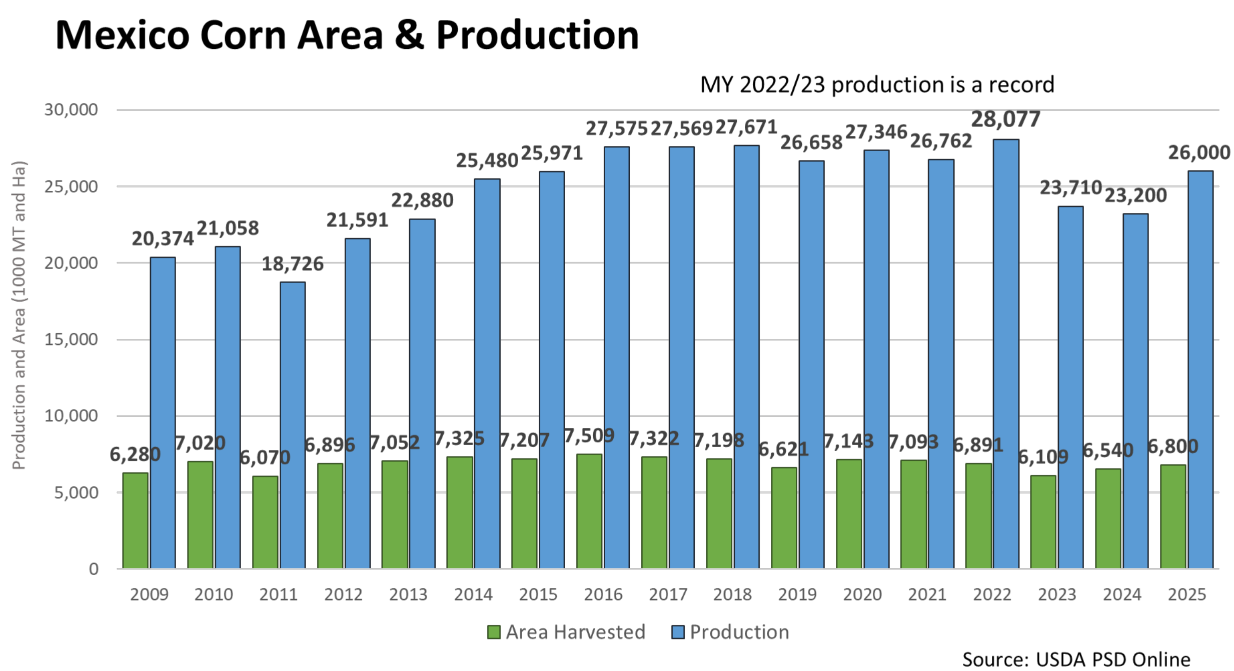



Figure 2. Historical harvested area and production series for Mexico putting the most recent three years into context. Source: USDA PSD Online

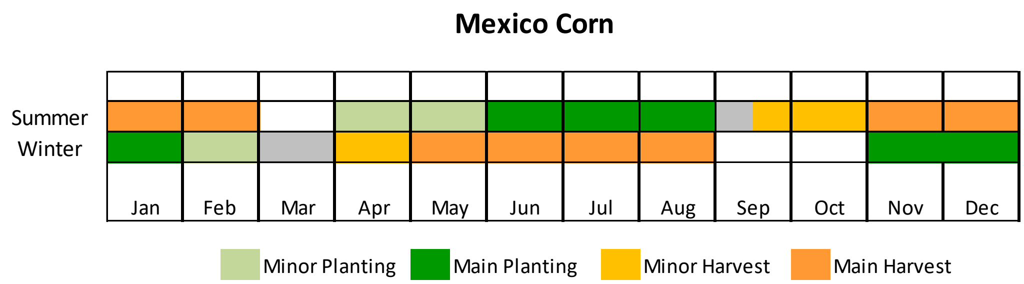



Figure 3. Key planting and harvest windows for the summer and winter corn crop seasons in Mexico. Source: USDA Foreign Agricultural Service

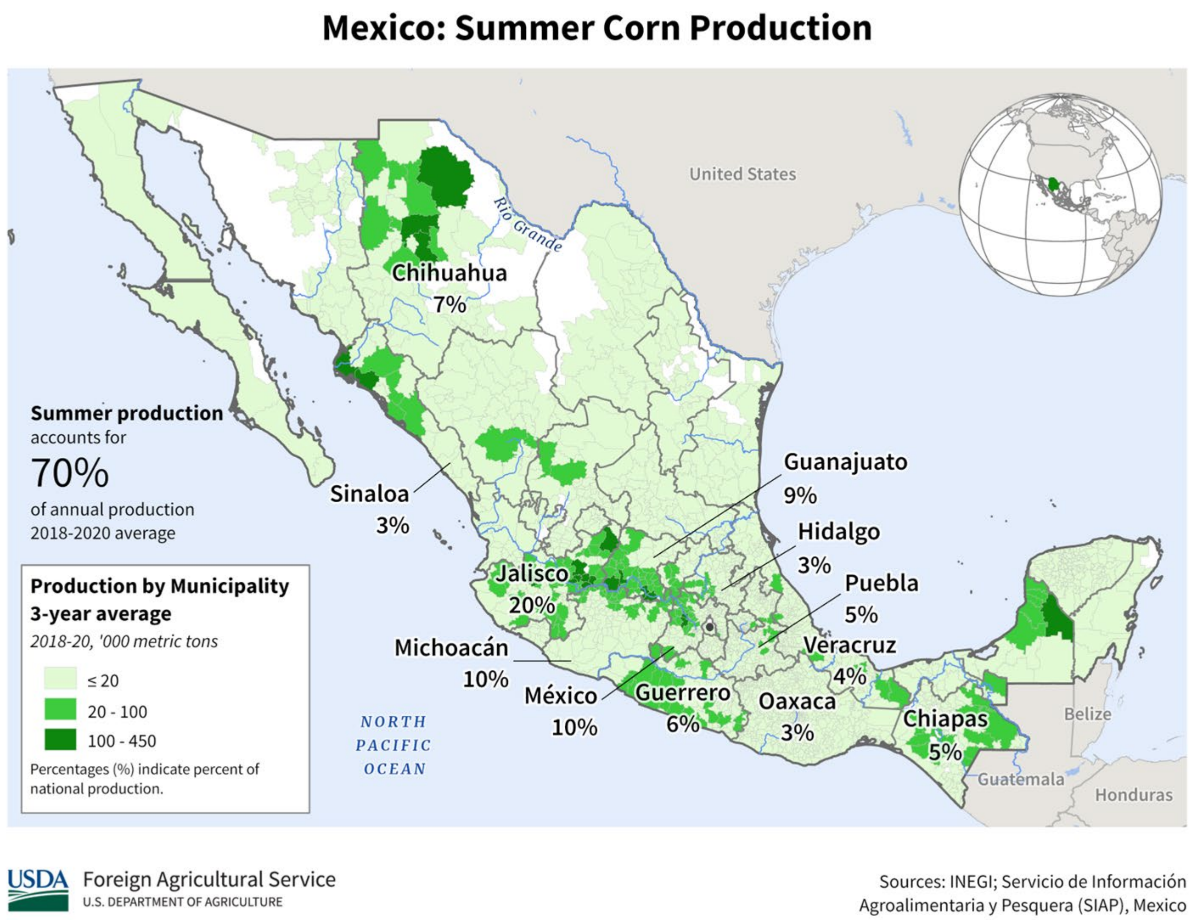
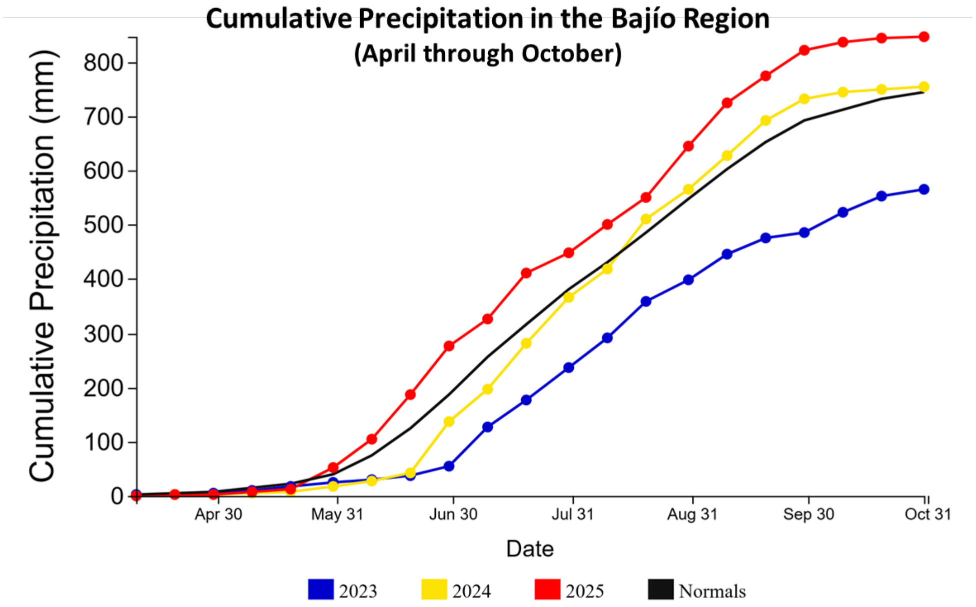
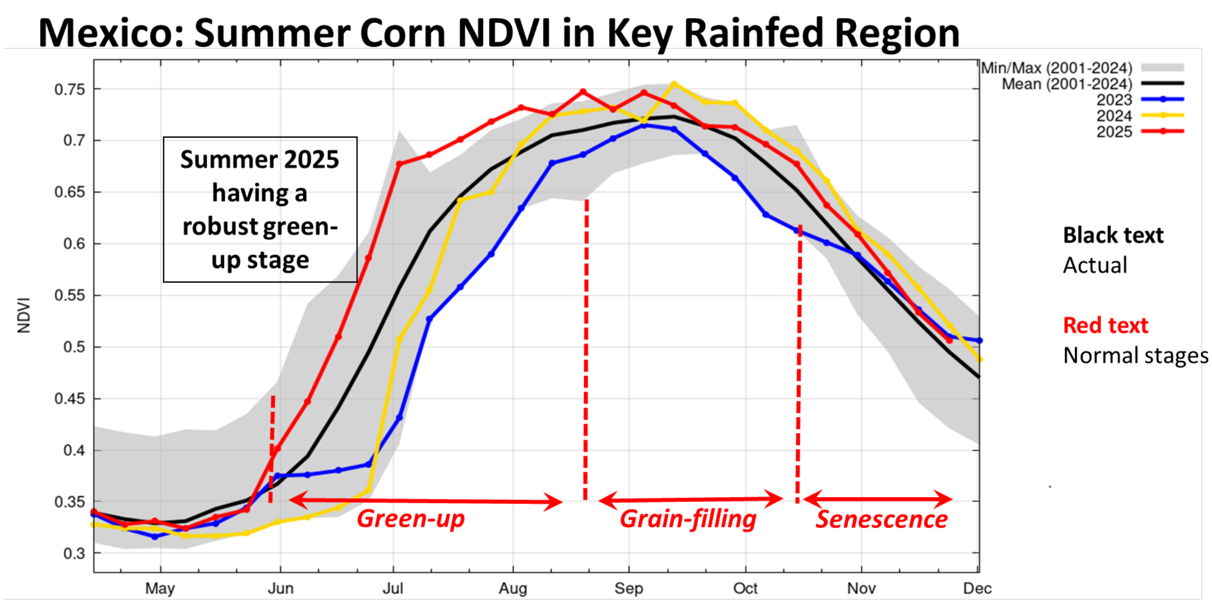



Figure 4. Geographic distribution of summer corn production by municipality. It is about 85 percent rainfed. Generally, greater than 100,000 metric tons of corn are produced in each dark green municipality. Source: *Servicio de Información Agroalimentaría y Pesquera* (SIAP), Mexico




Source: University of California Santa Barbara, CHIRPS

Figure 5. Mexico's rainy season performed adequately in 2025 (June through October), after somewhat recovering in 2024 and weathering a tough drought in 2023. The chart includes dekadal (roughly every 10 days) data. Source: UC Santa Barbara, CHIRPS plotted with the Global Agricultural and Disaster Assessment System (GADAS).

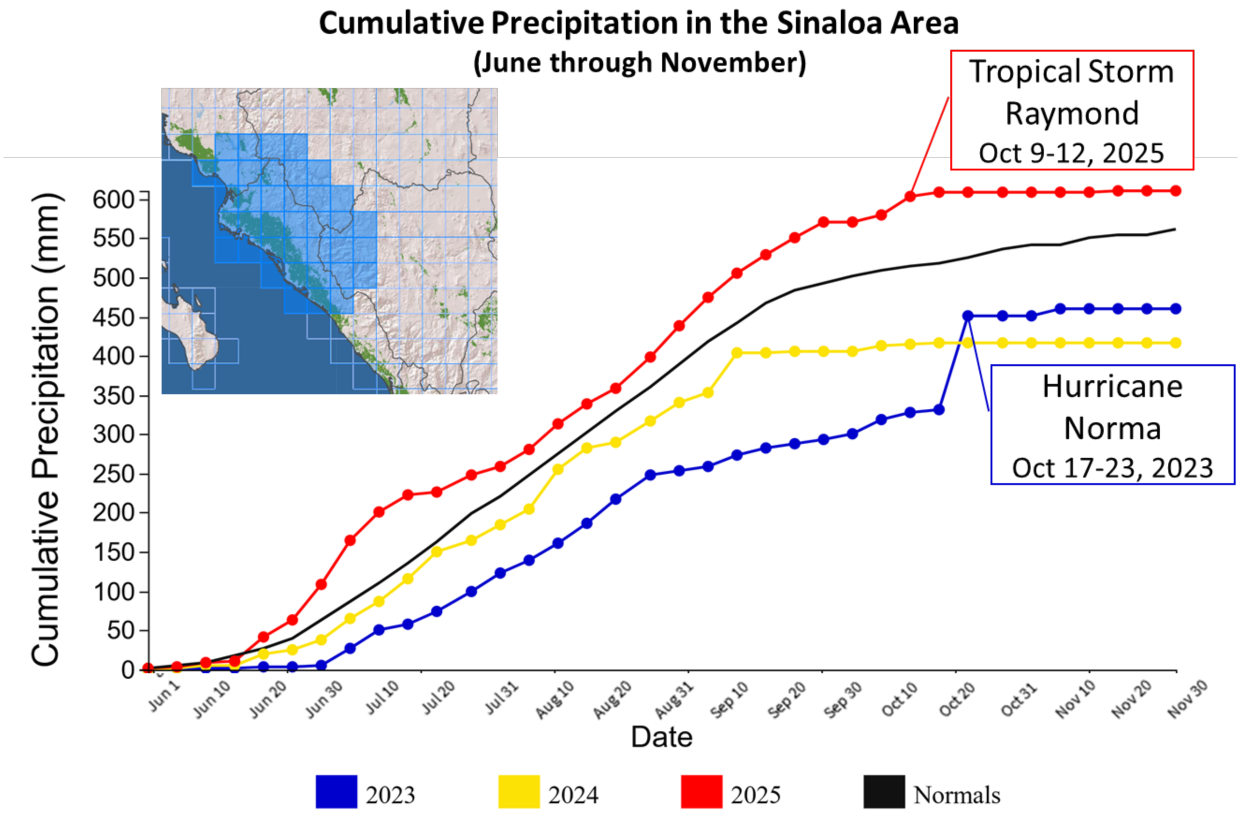



Coverage: Corn Croplands in Jalisco, State of Mexico, Michoacán, Guanajuato, Guerrero, and Puebla

Source: NASA/GIMMS & USDA/FAS/IPAD Global Agricultural Monitor (GLAM); ASRC Federal Sentinel-2-derived Corn Mask

Figure 6. The satellite-derived Normalized Difference Vegetation Index (NDVI) data indicate better yield potential this season compared to the last two years. Source: MODIS 8-day Terra NDVI data (250m) plotted with the NASA/USDA Global Agricultural Monitor (GLAM).


Figure 7. Geographic distribution of winter corn production by municipality. It is about 60 percent irrigated. Generally, greater than 500,000 metric tons of corn are produced in each dark green municipality. Source: *Servicio de Información Agroalimentaría y Pesquera* (SIAP), Mexico




Source: NOAA CPC

Figure 8. In and around Sinaloa, the rainy season performed better than normal in 2025 (June through October), after insufficient rainfall in 2024 and 2023. The chart includes pentad (roughly every 5 days) data. Source: NOAA Climate Prediction Center plotted with GADAS.

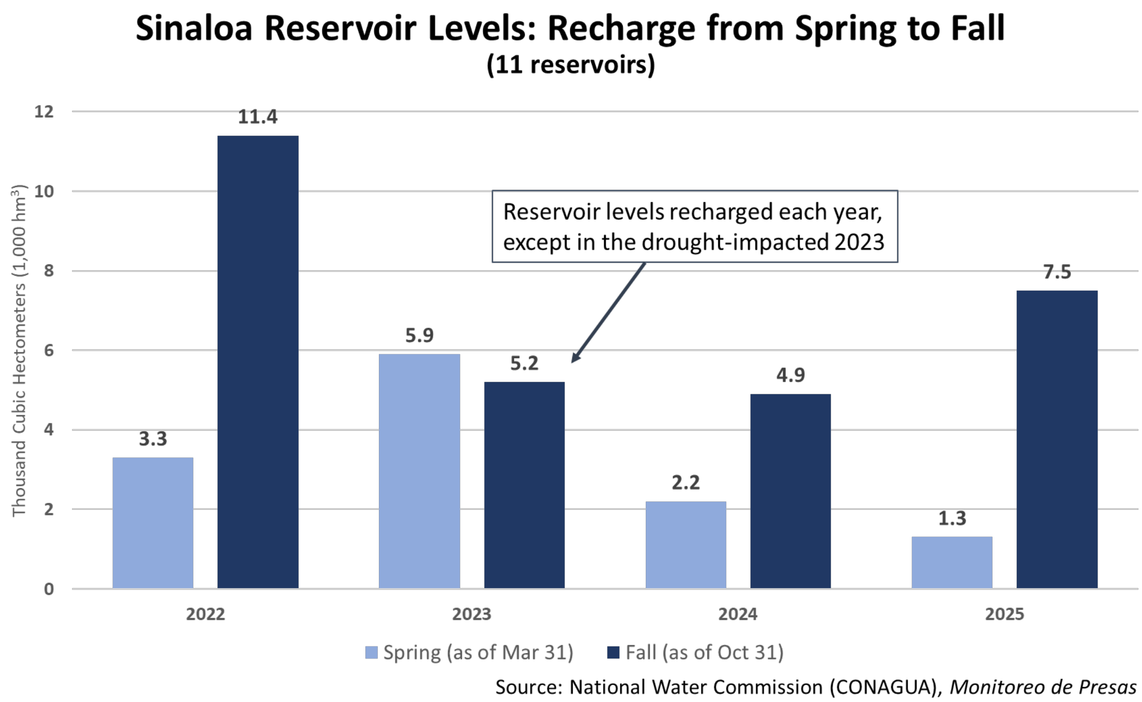



Figure 9. CONAGUA monitors water levels at dams daily throughout Mexico. This chart shows data for the last four years before and after the rainy season. As of October 31, the reservoirs in Sinaloa have been refilled better in 2025 than the two previous years, indicating farmers will have access to more water for irrigation. Source: *Comisión Nacional del Agua* (CONAGUA), *Monitoreo de Presas*

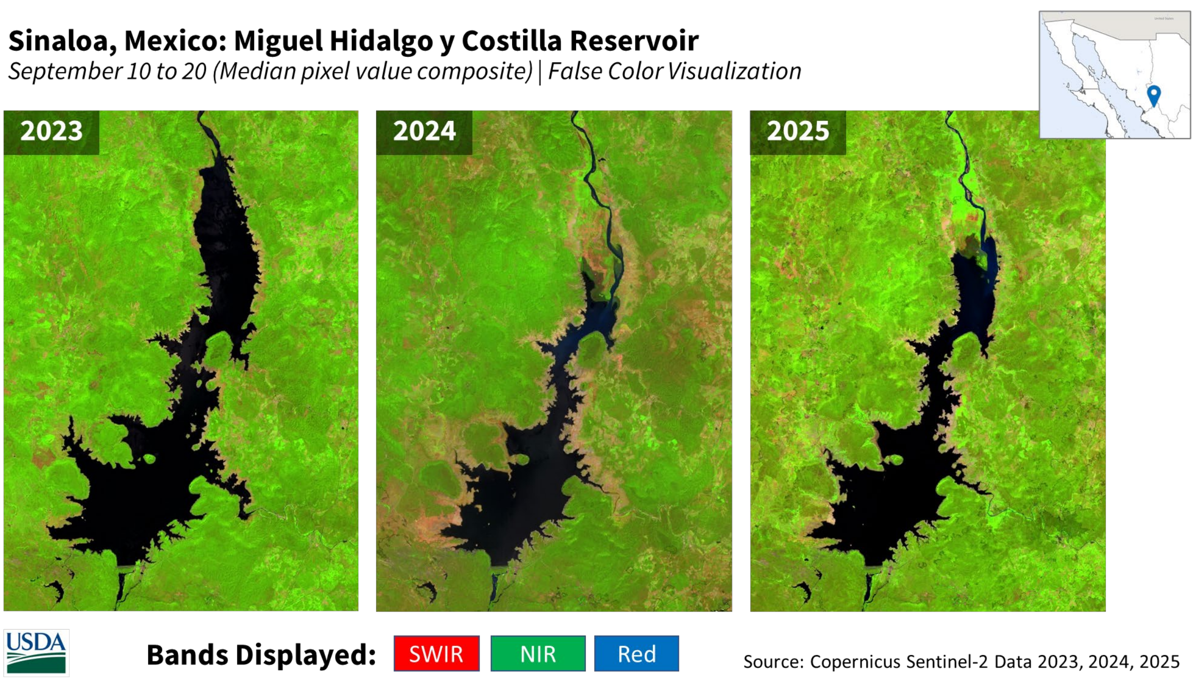



Figure 10. Sentinel-2 satellite imagery shows the extent of water levels in mid-September each year for the Miguel Hidalgo and Costilla reservoir as an early observation for the winter season. Source: Copernicus Sentinel-2 imagery visualized via Google Earth Engine.

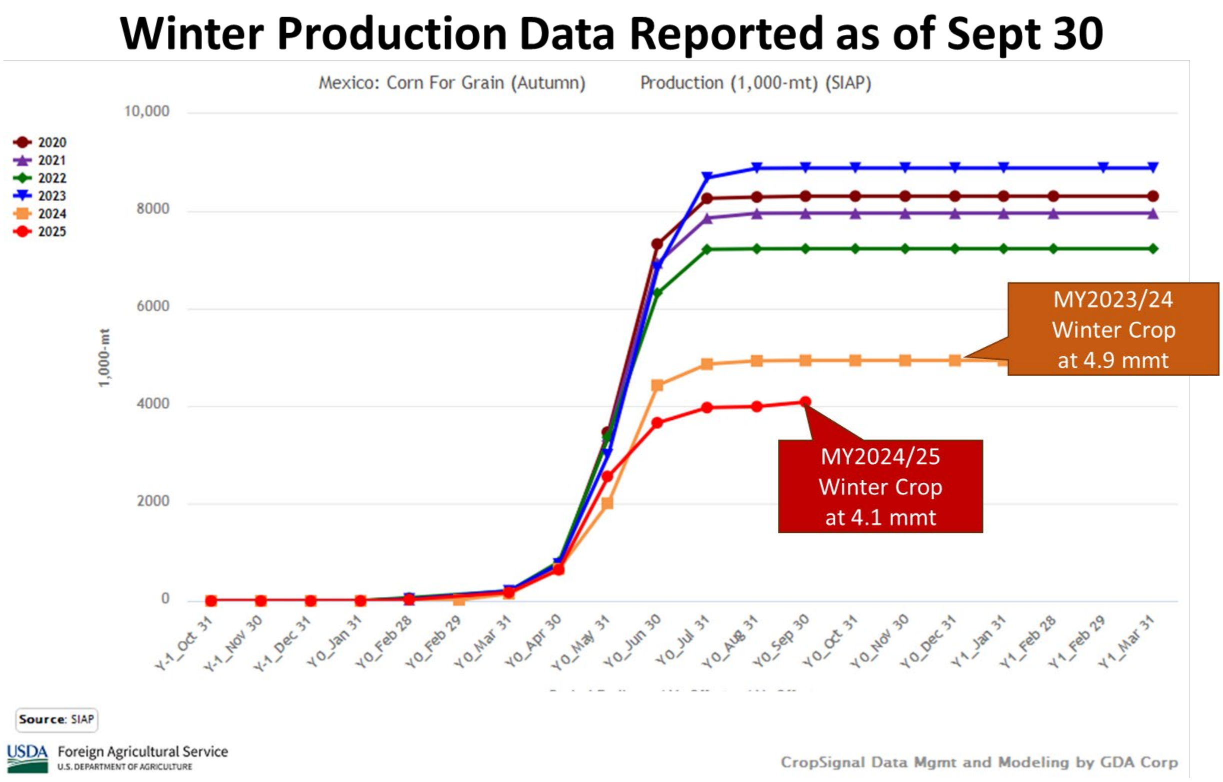



Figure 11. SIAP provides advanced estimates monthly as they receive planting and harvest reports. These advanced winter production estimates show how drought-impacted winter corn had been in MY 2023/24 and MY 2024/25 in comparison with previous years. Source: *Servicio de Información Agroalimentaria y Pesquera* (SIAP), Mexico

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