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Mexico's CNA 2026-2030 Institutional Program

What the new competition authority plans to do - and how businesses should prepare

On 30 June 2026, Mexico published the roadmap that will guide the Comisión Nacional Antimonopolio (CNA) through 2030. The Program does not create new infringements or replace Mexico's competition statute (LFCE). It does show where the authority plans to focus, which results it will measure and what boards, legal, compliance, strategy and M&A teams should monitor.

AT A GLANCE

The Program matters to business for three reasons: it identifies six strategic market areas; reinforces detection of anticompetitive conduct and transactions that should have been notified; and sets annual targets for four institutional outcomes. The draft-to-final comparison reveals another consequential decision: the public scorecard contracted from 10 indicators to 4. Accountability becomes simpler, but several sensitive functions no longer carry an equivalent strategic KPI.

What is the CNA, and what does this Program decide?

The CNA is Mexico's federal competition authority. Under the LFCE, it is a decentralized federal entity under the Ministry of Economy, with technical and operational independence. Its remit includes investigating anticompetitive practices, removing barriers, reviewing mergers and exercising specific competition powers in telecommunications and broadcasting.

The Program translates that mandate into management priorities for 2026-2030. It neither predicts a case outcome nor makes conduct unlawful by itself. Its business value lies in showing how resources, oversight, market studies and preventive tools are expected to be organized.

The four workstreams, translated into business exposure

Program workstream	What it means for business
1 · Anticompetitive conduct	More emphasis on detection, investigations, complaints, leniency, sanctions and compliance with decisions.
2 · Barriers and regulated markets	Barrier and essential-facility cases, plus telecom and broadcasting oversight.
3 · Merger control	Review of notified deals, monitoring of remedies and detection of transactions that should have been filed.
4 · Culture and prevention	Market studies, recommendations and certification of competition compliance programs.

WHY IT MATTERS NOW

The Program turns broad priorities into an observable agenda. Three signals are particularly practical: potentially greater attention in six areas, a faster average target for certain merger reviews and the future implementation of compliance certification. None creates a presumption of infringement, but each supports reviewing exposure, documentation and protocols before an information request, investigation or transaction.

From public priorities to business signals

SIX STRATEGIC MARKET AREAS

Agrifood · Health · Financial · Transport and logistics · Telecommunications and broadcasting · Public procurement

How to read the CNA's stated focus

Priority does not mean exclusivity. These areas are express points of prioritization and may receive studies, recommendations or detection initiatives. The CNA retains authority to act in other markets.

A timing target is not automatic clearance. The 29-to-25-business-day average covers merger filings that do not require an extension. The LFCE allows up to 20 additional business days in exceptionally complex matters.

Certification is not a safe harbor. The Program promotes certification of compliance programs, but does not itself provide immunity, exclude liability or guarantee automatic penalty mitigation.

The 2026-2030 scorecard: four paths that can be monitored

Annual targets allow actual execution to be tested against a public path. These are management and procedural-outcome indicators; they do not capture the full intensity or economic effect of enforcement.

Indicator	2026	2027	2028	2029	2030
Anticompetitive practices	65.50%	65.75%	66.00%	66.25%	66.50%
Barrier cases with measures	60.00%	60.25%	60.50%	60.75%	61.00%
Merger review · days	29	28	27	26	25
Strategic market areas	0%	16.66%	33.33%	66.67%	83.32%

The 83.32% figure is reproduced as published in the official Program. This cumulative indicator treats an area as “analyzed” once at least one advocacy paper, study or research paper has been published.

What actually changed from draft to final Program

Topic	Draft	Final Program
Strategic indicators	10 metrics	4 metrics
Objective 3	Prevent concentration in domestic markets	Ensure efficient merger control
Objective 4	Build knowledge of competition principles	Foster a culture of competition
Strategic market areas	The same six were already identified	All six remain

The most informative change is not sector selection, which was already in the draft. It is the narrower set of outcomes the CNA commits to measuring publicly as strategic performance.

What businesses should watch from 2026 to 2030

The ASDEC business radar

Sector exposure. Which areas first receive studies, advocacy papers, recommendations, information requests or detection initiatives.

Enforcement beyond the percentage. Case openings, conduct theories, commitments, measures, sanctions and sectors. Rolling proportions can smooth short-term shifts.

M&A and gun-jumping. Actual review times, information requests, extensions and outcomes, plus detection and sanctions for transactions that should have been notified.

Telecom and broadcasting. Early approaches to preponderant economic agents, a Mexico-specific telecom concept, substantial market power, asymmetric measures and compliance verification.

Compliance certification. Criteria, process, scope and practical effects, without assuming a legal benefit that lacks a specific basis.

WHAT THE FINAL PROGRAM STOPPED MEASURING PUBLICLY

Six draft indicators did not make the final scorecard: favorable outcomes in amparo judicial review; verification of telecom measures; verification of broadcasting measures; timing of opinions on concessions and permits; the Global Competition Review enforcement rating; and collaboration agreements producing advocacy actions. Removing a KPI does not eliminate the underlying function: several remain expressly embedded in the Program strategies and action lines.

The ASDEC view: Law + Economics + Institutions

LAW The Program organizes priorities, but does not itself change the CNA's statutory powers, business obligations or the elements of an infringement under the LFCE.

ECONOMICS The four indicators measure activity or procedural outcomes. They do not directly capture consumer savings, deterrence, entry, innovation or compliance cost.

INSTITUTIONS Moving from ten metrics to four eases monitoring but reduces granularity. Budget, data quality, technical consistency and judicial resilience remain necessary to assess performance.

What to do now

Exposure map. Match markets, commercial relationships, regulation, public procurement and M&A plans against the Program's four objectives and action lines.

Preventive protocols. Refresh compliance, information-exchange, competitor-contact and early merger-filing assessment procedures.

CNA Watch. Build a 2026 baseline and review studies, investigations, decisions, indicators, guidance and institutional funding every quarter.

ASDEC PERSPECTIVE

The Program is valuable not because it predicts a case, but because it provides an official map of risks and signals. Businesses should not wait until 2030: they can translate its six areas and four objectives into company-specific exposure, document sensitive decisions and compare institutional commitments with actual practice. The first formal checkpoint comes in January 2027, with the 2026 results.

WHAT DOES THIS MEAN FOR YOUR BUSINESS? ASDEC can translate the Program into a company-specific map of competition exposure, transaction priorities and compliance needs. asdec.com.mx

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