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Mexico

Oilseeds and Products

Annual

2002

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Report Highlights:

Despite Mexico's current economic slowdown, Mexico's crushing industry continues to expect growth and increased oilseeds' imports, primarily from the United States. This is largely fueled by the livestock industry's ongoing expansion. As crushing capacity and utilization have increased, imports of oil have generally declined.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Mexico [MX1], MX

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SECTION I. SITUATION AND OUTLOOK

Economic Situation and Outlook

The outlook for the overall Mexican economy in CY 2002 continues to be pessimistic as a result of the recession in the United States, which continues to spill over into Mexico. Most private economists agree with the Government of Mexico's (GOM) modest projection of real 1.5 percent GDP growth for 2002, a 0.3 percent decrease from CY 2001. The growth of the Mexican economy has slowed considerably compared to CY 2000, which had a 6.9 percent growth rate. Private economists estimate that this year's economic performance could have negative impacts on the consumer purchasing power, thereby decreasing domestic demand for almost all major imports. Inflation in CY 2002 may be slightly lower than it was in CY 2001. The inflation rate for CY 2001 was 5.2 percent and forecasters are predicting a 4.8 percent inflation rate for CY 2002. Despite these negative indicators, it is the first time that Mexico is weathering a global economic recession while maintaining macroeconomic stability. Recently, Mexico was even granted investment grade status by Standard and Poors, which allows pension fund companies to invest in Mexico.

Situation & Outlook for Oilseeds: Over the next three to five years, imports of U.S. oilseeds should increase, as Mexico recovers from the internal slowdown discussed above. Although the government would like to achieve greater self-sufficiency in oilseed production, several factors limit Mexico's ability to expand production. Soybean production takes place primarily in non-irrigated areas, which are subject to unpredictable weather conditions. Cotton production could continue to be depressed if international prices continue to be less favorable than returns from producing staple crops. Peanut production does not go to oil or meal, and rapeseed and sunflower production are nil. Peanut production is forecast to increase slightly, as are consumption and imports. The GOM's budget constraints will continue to hamper the GOM's program to increase palm oil production.

For MY 2002/03, imports of U.S. oilseeds are forecast to increase, albeit at a slower pace than last year. The U.S. continues to be the major supplier, due to its geographic proximity coupled with market promotion efforts and access to credit guarantees. Imports continue to be dominated by soybeans, followed by rapeseed, cottonseed, peanuts and sunflower seed. The U.S. market share is expected to remain at approximately 80 percent, followed by Canada (rapeseed), Brazil (soybeans) and Poland (rapeseed). U.S. soybean exports to Mexico are expected to increase by approximately 2 percent in MY 2002/03.

Mexican soybean production is expected to remain practically unchanged in MY 2002/03, due to low domestic prices, insufficient government supports, and some white fly infestation in producing regions such as Sinaloa and Sonora. Domestic production will account for less than 3 percent of total consumption, with the rest coming from imports. The estimate of Mexican soybean production for MY 2001/02 has been increased to 129,000 MT as a result of good weather conditions. Despite a lower planted and harvested area than previously anticipated, yields increased during the spring/summer 2001 crop cycle, due to timely and above average rains. The production estimate for MY 2000/01 reflects the latest official Mexican government data.

The GOM plans to provide Mexican farmers incentives to switch production from white corn to crops that Mexico is not self sufficient in producing (i.e., yellow corn, sorghum and oilseeds.) Oilseed industry sources, however, are skeptical about the impact of this new program (See MX 2037), due to its budget limitations and the lack of political commitment toward oilseed producers. Moreover, they indicated that, despite efforts by the GOM to increase production of several oilseeds, unpredictable weather and scarce water supplies are expected to leave Mexico dependent on imports, mainly from the U.S.

Oilmeal imports are expected to continue to increase in the near term albeit at a slower pace than last year. Most of the demand growth is fueled by the livestock industry. Increased consumption of oilseed products is forecast for CY 2002 despite the general negative Mexican economic situation. The poultry sector, for example, is expected to continue growing in CY2002 (See MX 2014). Total oil imports are forecast to decline as domestic production increases.

Marketing

As stated earlier, the U.S. is expected to remain the primary source of imported oilseeds and related products in the coming year. To help ensure that those imports continue to increase, FAS's Agricultural Trade Office (ATO) in Mexico City is here to help, among other industries, the U.S. oilseeds industry. The ATO's primary mission is to assist in the market development and promotion of U.S. food and agricultural products in the Mexican market. There are a wide variety of activities and services that the ATO, along with other private sector representatives called "cooperators," help in developing U.S. agricultural interests in Mexico. The cooperator groups in Mexico that represent the U.S. oilseeds industries are: the American Soybean Association (ASA); the National Sunflower Association; and the National Cottonseed Products Association. They can provide information on all aspects of U.S. oilseeds and products, including sourcing, uses, purchasing and feeding. Technical help in the areas of end-use, processing and technology, as well as education on the United States as a supplier, are part of the U.S. oilseed's Cooperators programs.

Offices of ASA are located in the ATO at Jaime Balmes 8-201, Col. Polanco, 11510 Mexico, D.F. They can be reached by telephone at 011-52-55-5281-0120 or by fax at 011-52-55-5281-6154. Contact with the National Sunflower Association and the National Cottonseed Products Association can be made via the ATO office by telephone or fax at 011-52-55-5080-2000, ext. 4371,4267,4787, 4643 and 011-52-55-5202-0528, respectively. The ATO email address is ato@supernet.com.mx

SECTION II. STATISTICAL TABLES

PS&D Total, Oilseeds

PSD Table						
Country	Mexico					
Commodity	Oilseed, Total				(1000 HA)(1000 MT)	
	Revised2000		Preliminary2001		Forecast2002	
	Old	New	Old	New	Old	New
	2000		2001		2002	
Area Planted	351	240	300	276	0	210
Area Harvested	267	229	278	269	0	203
Beginning Stocks	120	120	123	101	124	138
Production	396	367	411	452	0	341
MY Imports	5847	5601	5911	5808	0	5982
MY Imp. from U.S.	4459	4534	4518	4642	0	4795
MY Imp. from the EC	100	100	0	0	0	0
TOTAL SUPPLY	6363	6088	6445	6361	124	6461
MY Exports	9	3	5	3	0	4
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	5923	5706	5983	5952	0	6118
Food Use Dom. Consump.	232	202	247	206	0	4
Feed,Seed,Waste Dm.Cn.	76	76	86	62	0	266
TOTAL Dom. Consumption	6231	5984	6316	6220	0	6388
Ending Stocks	123	101	124	138	0	69
TOTAL DISTRIBUTION	6363	6088	6445	6361	0	6461
Calendar Year Imports	0	5346	0	5765	0	5937
Calendar Yr Imp. U.S.	0	4163	0	4625	0	4760
Calendar Year Exports	0	4	0	4	0	5
Calndr Yr Exp. to U.S.	0	3	0	3	0	4

PS&D Oilseeds, Soybean

PSD Table						
Country	Mexico					
Commodity	Oilseed, Soybean			(1000 HA)(1000 MT)		
	Revised2000		Preliminary2001		Forecast2002	
	Old	New	Old	New	Old	New
Market Year Begin	09/2000		09/2001		09/2002	
Area Planted	80	77	90	78	0	80
Area Harvested	77	70	82	77	0	76
Beginning Stocks	75	75	95	67	100	75
Production	105	103	120	129	0	127
MY Imports	4400	4374	4525	4525	0	4650
MY Imp. from U.S.	4100	4200	4150	4300	0	4400
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	4580	4552	4740	4721	100	4852
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	4450	4450	4600	4600	0	4770
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	35	35	40	46	0	40
TOTAL Dom. Consumption	4485	4485	4640	4646	0	4810
Ending Stocks	95	67	100	75	0	42
TOTAL DISTRIBUTION	4580	4552	4740	4721	0	4852
Calendar Year Imports	0	3984	0	4474	0	4600
Calendar Yr Imp. U.S.	0	3828	0	4267	0	4350
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Trade Matrix Oilseed Soybean

<i>OILSEED, SOYBEAN</i> HS.1201.0002 & 1201.0003		UNITS: THOUSAND METRIC TONS	
EXPORTS FOR MY 2000/2001 TO:		IMPORTS FOR MY 2000/2001 FROM:	
U.S.	0	U.S.	4,103
OTHER		OTHER	
	0	BRAZIL	206
TOTAL OF OTHER		TOTAL OF OTHER	206
OTHERS NOT LISTED	0	OTHERS NOT LISTED	0
GRAND TOTAL	0	GRAND TOTAL	4,309

SOURCE: Global Trade Information Services, Inc. "World Trade Atlas" Mexico Edition, December 2001.

Note: MY begins on September 2000 and ends August 2001.

PS&D Oilseeds, Peanut

PSD Table	Mexico					
Country	Mexico					
Commodity	Oilseed, Peanut				(1000 HA)(1000 MT)	
	Revised2000		Preliminary2001		Forecast2002	
	Old	New	Old	New	Old	New
Market Year Begin	09/2000		09/2001		09/2002	
Area Planted	111	79	100	80	0	82
Area Harvested	110	78	100	78	0	80
Beginning Stocks	0	0	0	0	0	0
Production	160	134	140	135	0	136
MY Imports	85	75	116	78	0	82
My Imp. from U.S.	50	28	50	27	0	30
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	245	209	256	213	0	218
MY Exports	9	3	5	3	0	4
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	4	4	4	4	0	0
Food Use Dom. Consump.	232	202	247	206	0	4
Feed,Seed,Waste Dm.Cn.	0	0	0	0	0	210
TOTAL Dom. Consumption	236	206	251	210	0	214
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	245	209	256	213	0	218
Calendar Year Imports	0	78	0	85	0	85
Calendar Yr Imp. U.S.	0	41	0	28	0	32
Calendar Year Exports	0	4	0	4	0	5
Calndr Yr Exp. to U.S.	0	3	0	3	0	4

Trade Matrix Oilseed Peanut

<i>OILSEED, PEANUT</i> &1202.2001		H.S. 1202.1099	UNITS: THOUSAND METRIC TONS	
EXPORTS FOR MY 2000/2001 TO:		IMPORTS FOR MY 2000/2001 FROM:		
U.S.	7	U.S.	28	
OTHER		OTHER		
		NICARAGUA	24	
TOTAL OF OTHER	0	TOTAL OF OTHER	24	
OTHERS NOT LISTED	0	OTHERS NOT LISTED	23	
GRAND TOTAL	7	GRAND TOTAL	75	

SOURCE: Global Trade Information Services, Inc. "World Trade Atlas" Mexico Edition, December 2001.

Note: MY begins on September 2000 and ends August 2001.

PS&D Oilseeds, Cottonseed

PSD Table	Mexico					
Country	Mexico					
Commodity	Oilseed, Cottonseed		(1000 HA)(1000 MT)(RATIO)			
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
Market Year Begin	08/2000		08/2001		08/2002	
Area Planted (COTTON)	160	84	110	118	0	48
Area Harvested(COTTON)	79	81	95	114	0	47
Seed to Lint Ratio	0	0	0	0	0	0
Beginning Stocks	12	12	4	5	9	37
Production	130	130	150	188	0	78
MY Imports	290	243	300	300	0	350
MY Imp. from U.S.	290	243	300	300	0	350
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	432	385	454	493	9	465
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	393	345	405	446	0	450
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cm.	35	35	40	10	0	10
TOTAL Dom. Consumption	428	380	445	456	0	460
Ending Stocks	4	5	9	37	0	5
TOTAL DISTRIBUTION	432	385	454	493	0	465
Calendar Year Imports	0	258	0	304	0	355
Calendar Yr Imp. U.S.	0	258	0	304	0	355
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Trade Matrix Oilseed Cottonseed

<i>OILSEED, COTTONSEED</i> H.S.1207.2099		UNITS: THOUSAND METRIC TONS	
EXPORTS FOR MY 2000/2001 TO:		IMPORTS FOR MY 2000/2001 FROM:	
U.S.	1	U.S.	243
OTHER		OTHER	0
TOTAL OF OTHER	0	TOTAL OF OTHER	0
OTHERS NOT LISTED	0	OTHERS NOT LISTED	0
GRAND TOTAL	1	GRAND TOTAL	243

SOURCE: Global Trade Information Services, Inc. "World Trade Atlas" Mexico Edition, December 2001.

Note: MY begins on August 2000 and ends July 2001.

PS&D Oilseeds, Sunflowerseed

PSD Table	Mexico					
Country	Mexico					
Commodity	Oilseed, Sunflowerseed				(1000 HA)(1000 MT)	
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
Market Year Begin	10/2000		10/2001		10/2002	
Area Planted	0	0	0	0	0	0
Area Harvested	1	0	1	0	0	0
Beginning Stocks	23	23	14	19	5	16
Production	1	0	1	0	0	0
MY Imports	22	28	20	20	0	20
MY Imp. from U.S.	19	24	18	15	0	15
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	46	51	35	39	5	36
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	26	26	24	17	0	18
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	6	6	6	6	0	6
TOTAL Dom. Consumption	32	32	30	23	0	24
Ending Stocks	14	19	5	16	0	12
TOTAL DISTRIBUTION	46	51	35	39	0	36
Calendar Year Imports	0	22	0	17	0	17
Calendar Yr Imp. U.S.	0	19	0	13	0	13
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Trade Matrix Oilseed Sunflowerseed

<i>OILSEED, SUNFLOWERSEED</i> H.S.1206.0099		UNITS: THOUSAND METRIC TONS	
EXPORTS FOR MY 2000/2001 TO:		IMPORTS FOR MY 2000/2001 FROM:	
U.S.	0	U.S.	24
OTHER		OTHER	
		CANADA	4
TOTAL OF OTHER	0	TOTAL OF OTHER	4
OTHERS NOT LISTED	0	OTHERS NOT LISTED	0
GRAND TOTAL	0	GRAND TOTAL	28

SOURCE: Global Trade Information Services, Inc. "World Trade Atlas" Mexico Edition, December 2001.

Note: MY begins on October 2000 and ends September 2001.

PS&D Oilseeds, Rapeseed

PSD Table	Mexico					
Country	Mexico					
Commodity	Oilseed, Rapeseed				(1000 HA)(1000 MT)	
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
Market Year Begin	10/2000		10/2001		10/2002	
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Beginning Stocks	10	10	10	10	10	10
Production	0	0	0	0	0	0
MY Imports	1050	881	950	885	0	880
MY Imp. from U.S.	0	39	0	0	0	0
MY Imp. from the EC	100	100	0	0	0	0
TOTAL SUPPLY	1060	891	960	895	10	890
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	1050	881	950	885	0	880
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	0	0	0	0	0	0
TOTAL Dom. Consumption	1050	881	950	885	0	880
Ending Stocks	10	10	10	10	0	10
TOTAL DISTRIBUTION	1060	891	960	895	0	890
Calendar Year Imports	0	1004	0	885	0	880
Calendar Yr Imp. U.S.	0	17	0	13	0	10
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Trade Matrix Oilseed Rapeseed

<i>OILSEED, RAPESEED</i> H.S.12005.0001 & 1205.0099		UNITS: THOUSAND METRIC TONS	
EXPORTS FOR MY 2000/2001 TO:		IMPORTS FOR MY 2000/2001 FROM:	
U.S.	0	U.S.	39
OTHER		OTHER	
		CANADA	819
TOTAL OF OTHER	0	TOTAL OF OTHER	819
OTHERS NOT LISTED	0	OTHERS NOT LISTED	23
GRAND TOTAL	0	GRAND TOTAL	881

SOURCE: Global Trade Information Services, Inc. "World Trade Atlas" Mexico Edition, December 2001.

Note: MY begins on October 2000 and ends September 2001.

PS&D Total, Meal

PSD Table	Mexico					
Country	Mexico					
Commodity	Meal, Total				(1000 MT)(PERCENT)	
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
	1999		2000		2001	
Crush	5923	5706	5983	5952	0	6118
Extr. Rate	0.7258146	0.735191	0.7300685	0.7128696	ERR	0.7074207
Beginning Stocks	150	150	150	136	150	56
Production	4299	4195	4368	4243	0	4328
MY Imports	378	356	498	503	0	665
MY Imp. from U.S.	373	356	485	493	0	530
MY Imp. from the EC	0	0	0	0	0	1
TOTAL SUPPLY	4827	4701	5016	4882	150	5049
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	50	50	55	55	0	55
Feed Waste Dom. Consum	4627	4515	4811	4771	0	4973
TOTAL Dom. Consumption	4677	4565	4866	4826	0	5028
Ending Stocks	150	136	150	56	0	21
TOTAL DISTRIBUTION	4827	4701	5016	4882	0	5049
Calendar Year Imports	6	243	5	409	0	455
Calendar Yr Imp. U.S.	0	243	0	400	0	431
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PS&D Meal, Soybean

PSD Table	Mexico					
Country	Mexico					
Commodity	Meal, Soybean				(1000 MT)(PERCENT)	
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
Market Year Begin	09/2000		09/2001		09/2002	
Crush	4450	4450	4600	4600	0	4770
Extr. Rate, 999.9999	0.793258	0.793258	0.793478	0.776087	ERR	0.765199
Beginning Stocks	150	150	150	136	150	56
Production	3530	3530	3650	3570	0	3650
MY Imports	260	246	380	380	0	520
MY Imp. from U.S.	260	246	380	380	0	410
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	3940	3926	4180	4086	150	4226
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	50	50	55	55	0	55
Feed Waste Dom. Consum	3740	3740	3975	3975	0	4150
TOTAL Dom. Consumption	3790	3790	4030	4030	0	4205
Ending Stocks	150	136	150	56	0	21
TOTAL DISTRIBUTION	3940	3926	4180	4086	0	4226
Calendar Year Imports	0	133	0	285	0	310
Calendar Yr Imp. U.S.	0	133	0	285	0	310
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Trade Matrix Meal Soybean

<i>MEAL, SOYBEAN</i> H.S.2304.0001		UNITS: THOUSAND METRIC TONS	
EXPORTS FOR MY 2000/2001 TO:		IMPORTS FOR MY 2000/2001 FROM:	
U.S.	0	U.S.	246
OTHER		OTHER	
TOTAL OF OTHER	0	TOTAL OF OTHER	0
OTHERS NOT LISTED	0	OTHERS NOT LISTED	0
GRAND TOTAL	0	GRAND TOTAL	246

SOURCE: Global Trade Information Services, Inc. "World Trade Atlas" Mexico Edition, December 2001.

Note: MY begins on September 2000 and ends August 2001.

PS&D Meal, Cottonseed

PSD Table	Mexico					
Country	Mexico					
Commodity	Meal, Cottonseed				(1000 MT)(PERCENT)	
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
Market Year Begin	08/2000		08/2001		08/2002	
Crush	393	345	405	446	0	450
Extr. Rate, 999.9999	0.450382	0.513043	0.449383	0.430493	ERR	0.431111
Beginning Stocks	0	0	0	0	0	0
Production	177	177	182	192	0	194
MY Imports	105	98	105	102	0	109
MY Imp. from U.S.	105	98	105	102	0	109
MY Imp. from the EC	0	0	0	0	0	1
TOTAL SUPPLY	282	275	287	294	0	303
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	282	275	287	294	0	303
TOTAL Dom. Consumption	282	275	287	294	0	303
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	282	275	287	294	0	303
Calendar Year Imports	0	100	0	104	0	110
Calendar Yr Imp. U.S.	0	100	0	104	0	110
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Trade Matrix Meal Cottonseed

<i>MEAL, COTTONSEED</i> H.S.2306.1001		UNITS: THOUSAND METRIC TONS	
EXPORTS FOR MY 2000/2001 TO:		IMPORTS FOR MY 2000/2001 FROM:	
U.S.	0	U.S.	98
OTHER		OTHER	
GUATEMALA	1		0
TOTAL OF OTHER	1	TOTAL OF OTHER	0
OTHERS NOT LISTED	0	OTHERS NOT LISTED	0
GRAND TOTAL	1	GRAND TOTAL	98

SOURCE: Global Trade Information Services, Inc. "World Trade Atlas" Mexico Edition, December 2001.

Note: MY begins on August 2000 and ends July 2001.

PS&D Meal, Rapeseed

PSD Table	Mexico					
Country	Mexico					
Commodity	Meal, Rapeseed				(1000 MT)(PERCENT)	
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
Market Year Begin	10/2000		10/2001		10/2002	
Crush	1050	881	950	885	0	880
Extr. Rate, 999.9999	0.552381	0.540295	0.552632	0.534463	ERR	0.539773
Beginning Stocks	0	0	0	0	0	0
Production	580	476	525	473	0	475
MY Imports	5	9	5	10	0	25
MY Imp. from U.S.	0	9	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	585	485	530	483	0	500
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	585	485	530	483	0	500
TOTAL Dom. Consumption	585	485	530	483	0	500
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	585	485	530	483	0	500
Calendar Year Imports	6	7	5	9	0	24
Calendar Yr Imp. U.S.	0	7	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PS&D Meal, Sunflowerseed

PSD Table	Mexico					
Country	Mexico					
Commodity	Meal, Sunflowerseed		(1000 MT)(PERCENT)			
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
Market Year Begin	10/2000		10/2001		10/2002	
Crush	26	26	24	17	0	18
Extr. Rate, 999.9999	0.461538	0.461538	0.458333	0.470588	ERR	0.5
Beginning Stocks	0	0	0	0	0	0
Production	12	12	11	8	0	9
MY Imports	8	3	8	11	0	11
MY Imp. from U.S.	8	3	0	11	0	11
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	20	15	19	19	0	20
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	20	15	19	19	0	20
TOTAL Dom. Consumption	20	15	19	19	0	20
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	20	15	19	19	0	20
Calendar Year Imports	0	3	0	11	0	11
Calendar Yr Imp. U.S.	0	3	0	11	0	11
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PS&D Total, Oil

PSD Table						
Country Mexico						
Commodity	Oil, Total				(1000 MT)(PERCENT)	
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
	1999		2000		2001	
Crush	6115	5862	6179	6113	0	6293
Extr. Rate	0.220278	0.2171614	0.2160544	0.2162604	ERR	0.2216749
Beginning Stocks	15	15	14	18	14	19
Production	1347	1273	1335	1322	0	1395
MY Imports	509	388	563	403	0	385
MY Imp. from U.S.	283	210	321	183	0	148
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	1871	1676	1912	1743	14	1799
MY Exports	10	10	20	5	0	10
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	256	218	267	243	0	250
Food Use Dom. Consump.	1575	1414	1605	1463	0	1506
Feed Waste Dom. Consum	16	16	6	13	0	13
TOTAL Dom. Consumption	1847	1648	1878	1719	0	1769
Ending Stocks	14	18	14	19	0	20
TOTAL DISTRIBUTION	1871	1676	1912	1743	0	1799
Calendar Year Imports	125	508	0	415	0	418
Calendar Yr Imp. U.S.	46	319	0	202	0	197
Calendar Year Exports	0	0	0	4	0	10
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PS&D Oil, Soybean

PSD Table	Mexico					
Country	Mexico					
Commodity	Oil, Soybean				(1000 MT)(PERCENT)	
	Revised2000		Preliminary2001		Forecast2002	
	Old	New	Old	New	Old	New
Market Year Begin	09/2000		09/2001		09/2002	
Crush	4450	4450	4600	4600	0	4770
Extr. Rate, 999.9999	0.170787	0.170787	0.170217	0.170217	ERR	0.178197
Beginning Stocks	5	5	4	12	4	15
Production	760	760	783	783	0	850
MY Imports	70	83	102	107	0	70
MY Imp. from U.S.	70	83	102	107	0	70
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	835	848	889	902	4	935
MY Exports	10	10	20	5	0	10
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	815	820	859	874	0	900
Feed Waste Dom. Consum	6	6	6	8	0	8
TOTAL Dom. Consumption	821	826	865	882	0	908
Ending Stocks	4	12	4	15	0	17
TOTAL DISTRIBUTION	835	848	889	902	0	935
Calendar Year Imports	0	108	0	112	0	92
Calendar Yr Imp. U.S.	0	108	0	112	0	92
Calendar Year Exports	0	0	0	4	0	10
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Trade Matrix Oil Soybean

<i>OIL, SOYBEAN</i> 1507.9099		H.S.1507.1001 &	UNITS: THOUSAND METRIC TONS	
EXPORTS FOR MY 2000/2001 TO:			IMPORTS FOR MY 2000/2001 FROM:	
U.S.	0	U.S.	83	
OTHER		OTHER		
TOTAL OF OTHER	5	TOTAL OF OTHER	0	
OTHERS NOT LISTED	5	OTHERS NOT LISTED	0	
GRAND TOTAL	5	GRAND TOTAL	83	

SOURCE: Global Trade Information Services, Inc. "World Trade Atlas" Mexico Edition, December 2001.

Note: MY begins on September 2000 and ends August 2001.

PS&D Oil, Sunflowerseed

PSD Table	Mexico					
Country	Mexico					
Commodity	Oil, Sunflowerseed				(1000 MT)(PERCENT)	
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
Market Year Begin	10/2000		10/2001		10/2002	
Crush	26	26	24	17	0	18
Extr. Rate, 999.9999	0.346154	0.346154	0.333333	0.352941	ERR	0.333333
Beginning Stocks	10	10	10	6	10	4
Production	9	9	8	6	0	6
MY Imports	164	70	175	45	0	48
MY Imp. from U.S.	154	70	160	45	0	48
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	183	89	193	57	10	58
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	163	73	183	48	0	50
Feed Waste Dom. Consum	10	10	0	5	0	5
TOTAL Dom. Consumption	173	83	183	53	0	55
Ending Stocks	10	6	10	4	0	3
TOTAL DISTRIBUTION	183	89	193	57	0	58
Calendar Year Imports	0	168	0	55	0	55
Calendar Yr Imp. U.S.	0	168	0	55	0	55
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Trade Matrix Oil Sunflowerseed

<i>OIL, SUNFLOWERSEED</i> H.S.1512.1101 & 1512.1999		UNITS: THOUSAND METRIC TONS	
EXPORTS FOR MY 2000/2001 TO:		IMPORTS FOR MY 2000/2001 FROM:	
U.S.	25	U.S.	70
OTHER		OTHER	
TOTAL OF OTHER	1	TOTAL OF OTHER	0
OTHERS NOT LISTED	1	OTHERS NOT LISTED	0
GRAND TOTAL	26	GRAND TOTAL	70

SOURCE: Global Trade Information Services, Inc. "World Trade Atlas" Mexico Edition, December 2001.

Note: MY begins on October 2000 and ends September 2001.

PS&D Oil, Rapeseed

PSD Table	Mexico					
Country	Mexico					
Commodity	Oil, Rapeseed				(1000 MT)(PERCENT)	
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
Market Year Begin	10/2000		10/2001		10/2002	
Crush	1050	881	950	885	0	880
Extr. Rate, 999.9999	0.37619	0.38706	0.375789	0.39661	ERR	0.392045
Beginning Stocks	0	0	0	0	0	0
Production	395	341	357	351	0	345
MY Imports	58	67	59	62	0	80
MY Imp. from U.S.	50	47	50	20	0	30
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	453	408	416	413	0	425
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	453	408	416	413	0	425
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	453	408	416	413	0	425
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	453	408	416	413	0	425
Calendar Year Imports	65	66	0	61	0	80
Calendar Yr Imp. U.S.	46	35	0	26	0	40
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Trade Matrix Oil Rapeseed

<i>OIL, RAPESEED</i> &1514.9099		H.S.1514.1001	UNITS: THOUSAND METRIC TONS	
EXPORTS FOR MY 2000/2001 TO:			IMPORTS FOR MY 2000/2001 FROM:	
U.S.		0	U.S.	47
OTHER			OTHER	
		0	CANADA	20
TOTAL OF OTHER		0	TOTAL OF OTHER	20
OTHERS NOT LISTED		1	OTHERS NOT LISTED	0
GRAND TOTAL		1	GRAND TOTAL	67

SOURCE: Global Trade Information Services, Inc. "World Trade Atlas" Mexico Edition, December 2001.

Note: MY begins on October 2000 and ends September 2001.

PS&D Oil, Coconut

PSD Table	Mexico					
Country	Mexico					
Commodity	Oil, Coconut				(1000 MT)(PERCENT)	
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
Market Year Begin	01/2001		01/2002		01/2003	
Crush	196	160	200	165	0	175
Extr. Rate, 999.9999	0.571429	0.6	0.57	0.593939	ERR	0.605714
Beginning Stocks	0	0	0	0	0	0
Production	112	96	114	98	0	106
MY Imports	63	19	65	11	0	6
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	175	115	179	109	0	112
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	104	69	107	65	0	67
Food Use Dom. Consump.	71	46	72	44	0	45
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	175	115	179	109	0	112
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	175	115	179	109	0	112
Calendar Year Imports	60	19	0	11	0	12
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Trade Matrix Oil Coconut

<i>OIL, COCONUT</i> &1513.1999		H.S.1513.1101	UNITS: THOUSAND METRIC TONS	
EXPORTS FOR MY 2001 TO:			IMPORTS FOR MY 2001 FROM:	
U.S.		0	U.S.	0
OTHER			OTHER	
		0	INDONESIA	9
TOTAL OF OTHER		0	TOTAL OF OTHER	2
OTHERS NOT LISTED		0	OTHERS NOT LISTED	0
GRAND TOTAL		0	GRAND TOTAL	11

SOURCE: Global Trade Information Services, Inc. "World Trade Atlas" Mexico Edition, December 2001.

Note: MY begins on January 2001 and ends December 2001.

PS&D Oil, Cottonseed

PSD Table	Mexico					
Country	Mexico					
Commodity	Oil, Cottonseed				(1000 MT)(PERCENT)	
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
Market Year Begin	08/2000		08/2001		08/2002	
Crush	393	345	405	446	0	450
Extr. Rate, 999.9999	0.16285	0.165217	0.162963	0.163677	ERR	0.164444
Beginning Stocks	0	0	0	0	0	0
Production	64	57	66	73	0	74
MY Imports	9	10	9	11	0	12
MY Imp. from U.S.	9	10	9	11	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	73	67	75	84	0	86
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	73	67	75	84	0	86
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	73	67	75	84	0	86
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	73	67	75	84	0	86
Calendar Year Imports	0	8	0	9	0	10
Calendar Yr Imp. U.S.	0	8	0	9	0	10
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PS&D Oil, Palm

PSD Table						
Country	Mexico					
Commodity	Oil, Palm			(1000 HA)(1000 TREES)(1000 MT)		
	Revised 2000		Preliminary 2001		Forecast 2002	
	Old	New	Old	New	Old	New
Market Year Begin	01/2001		01/2002		01/2003	
Area Planted	0	3	0	6	0	6
Area Harvested	0	3	0	6	0	6
Trees	0	0	0	0	0	0
Beginning Stocks	0	0	0	0	0	0
Production	7	10	7	11	0	14
MY Imports	145	139	153	167	0	169
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	152	149	160	178	0	183
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	152	149	160	178	0	183
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Consumption	0	0	0	0	0	0
TOTAL Dom. Consumption	152	149	160	178	0	183
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	152	149	160	178	0	183
Calendar Year Imports	0	139	0	167	0	169
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Trade Matrix Oil Palm

<i>OIL, PALM.</i> &1511.9099		H.S.1511.1001	UNITS: THOUSAND METRIC TONS	
EXPORTS FOR MY 2001 TO:			IMPORTS FOR MY 2001 FROM:	
U.S.	0	U.S.	0	
OTHER		OTHER		
	0	COSTA RICA	67	
TOTAL OF OTHER	0	TOTAL OF OTHER	67	
OTHERS NOT LISTED	0	OTHERS NOT LISTED	97	
GRAND TOTAL	0	GRAND TOTAL	164	

SOURCE: Global Trade Information Services, Inc. "World Trade Atlas" Mexico Edition, December 2001.

Note: MY begins on January 2001 and ends December 2001.

Mexico's Import Tariffs for 2002

OILS																
Commodity	SOYBEAN		PEANUT		PALM		COTTONSEED		COCONUT		PALM KERNEL		RAPSEED		CORN	
H.S	1507		1508		1511		1512		1513		1513		1514		1515	
subfraction	10.01	90.99	10.01	90.99	10.01	90.99	21.01	29.99	11.01	19.99	21.01	29.99	10.01	90.99	21.01	29.99
United States	1.0	2.0	1.0	2.0	1.0	2.0	1.0	2.0	1.0	2.0	1.0	2.0	1.0	2.0	1.0	2.0
Canada	1.0	2.0	1.0	2.0	1.0	2.0	1.0	2.0	1.0	2.0	1.0	2.0	1.0	2.0	1.0	2.0
EU	10.0	20.0	EXCL	EXCL	EXCL	EXCL	10.0	20.0	EXCL	EXCL	EXCL	EXCL	10.0	20.0	10.0	20.0
Sweden	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL
Norway	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL
Iceland	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL
Israel	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL
Guatemala	7.7	15.0	7.7	15.0	1.1	15.0	7.7	15.0	7.7	15.0	7.7	15.0	7.7	15.0	7.7	15.0
El Salvador	7.7	15.0	7.7	15.0	1.1	15.0	7.7	15.0	7.7	15.0	7.7	15.0	7.7	15.0	7.7	15.0
Honduras	7.7	15.0	7.7	15.0	1.1	15.0	7.7	15.0	7.7	15.0	7.7	15.0	7.7	15.0	7.7	15.0
Nicaragua	6.0/5.0	12.0/10.0	6.0/5.0	12.0/10.0	6.0/5.0	12.0/10.0	6.0/5.0	12.0/10.0	6.0/5.0	12.0/10.0	6.0/5.0	12.0/10.0	6.0/5.0	12.0/10.0	6.0/5.0	12.0/10.0
Costa Rica	2.0	4.0	2.0	4.0	Ex	4.0	2.0	4.0	2.0	4.0	2.0	4.0	2.0	4.0	2.0	4.0
Colombia	EXCL	EXCL	EXCL	EXCL	PAR	PAR	EXCL	EXCL	EXCL	EXCL	PAR	PAR	EXCL	EXCL	EXCL	EXCL
Venezuela	EXCL	EXCL	EXCL	EXCL	PAR	PAR	EXCL	EXCL	EXCL	EXCL	PAR	PAR	EXCL	EXCL	EXCL	EXCL
Bolivia	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL
Chile	EXCL	EXCL	EXCL	EXCL	PAR	PAR	EXCL	EXCL	EXCL	EXCL	PAR	EXCL	EXCL	EXCL	EXCL	EXCL
Uruguay	EXCL	EXCL	EXCL	EXCL	Ex	Ex	EXCL	EXCL	EXCL	EXCL	Ex	EXCL	EXCL	EXCL	EXCL	EXCL

EXCL Excluded
 PAR Partial (Preferential tariff: 28% lower than the ad-valorem tariff)
 Ex. Exempt

OILSEEDS							
Commodity	SOYBEAN		SUNFLOWER	RAPESEED	COTTONSEED	PEANUT	
H.S	1201		1206	1205	1207	1202	
subfraction	00.02	00.03	00.99	00.01	20.99	10.99	20.01
United States	Ex	1.0	Ex	Ex	Ex	Ex	Ex
Canada	Ex	1.0	Ex	Ex	Ex	Ex	Ex
EU	Ex	11.7/10.1	Ex	Ex	Ex	Ex	Ex
Sweden	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL
Norway	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL
Iceland	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL
Israel	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL	EXCL
Guatemala	EXCL	EXCL	Ex	Ex	Ex	Ex	Ex
El Salvador	Ex	Ex	Ex	Ex	Ex	Ex	Ex
Honduras	Ex	Ex	Ex	Ex	Ex	Ex	Ex
Nicaragua	Ex	9.0/7.5	Ex	Ex	Ex	Ex	Ex
Costa Rica	Ex	2.0	Ex	Ex	Ex	Ex	Ex
Colombia	EXCL	EXCL	EXCL	EXCL	Ex	PAR	PAR
Venezuela	EXCL	EXCL	EXCL	EXCL	Ex	PAR	PAR
Bolivia	Ex	3.0	Ex	Ex	Ex	Ex	Ex
Chile	Ex	Ex	Ex	Ex	Ex	Ex	Ex
Uruguay	Ex	Ex	EXCL	EXCL	EXCL	Ex	Ex

EXCL EXCLUDED. In this case the rate of duty must be in accordance with the Article 1 of the General Import Tariff Schedule, without any reduction
PAR Partial (Preferential tariff: 28% lower than the ad-valorem tariff)
Ex. EXEMPT

OILMEALS					
Commodity	SOYBEAN	SUNFLOWER	RAPESEED	COTTONSEED	PEANUT
H.S	2304	2306	2306	2306	2305
subfraction	00.01	30.01	40.01	10.01	00.01
United States	1.5	1.5	1.5	1.5	1.5
Canada	1.5	1.5	1.5	1.5	1.5
EU	11.7/10.1	11.7/10.1	11.7/10.1	11.7/10.1	11.7/10.1
Sweden	EXCL	EXCL	EXCL	EXCL	EXCL
Norway	EXCL	EXCL	EXCL	EXCL	EXCL
Iceland	EXCL	EXCL	EXCL	EXCL	EXCL
Israel	EXCL	EXCL	EXCL	EXCL	EXCL
Guatemala	11.6	11.6	11.6	3.1	11.6
El Salvador	11.6	11.6	11.6	3.1	11.6
Honduras	11.6	11.6	11.6	3.1	11.6
Nicaragua	3.0/Ex	3.0/Ex	3.0/Ex	0.6/Ex	3.0/Ex
Costa Rica	3.0	3.0	3.0	3.0	3.0
Colombia	EXCL	PAR	3.2/2.1	PAR	3.2/2.1
Venezuela	EXCL	PAR	3.2/2.1	PAR	3.2/2.1
Bolivia	EXCL	EXCL	EXCL	EXCL	EXCL
Chile	Ex	Ex	Ex	Ex	Ex
Uruguay	Ex	Ex	Ex	Ex	Ex
EXCL	Excluded				
PAR	Partial (Preferential tariff: 28% lower than the ad-valorem tariff)				
Ex.	Exempt				
SOURCE: SECRETARIAT OF ECONOMY (SE)					

FEED DEMAND STRATEGIC INDICATOR TABLES FOR MEXICO				
MEAT PRODUCTION				
		Last Year	Current Year	Out Year Forecast
Calendar Year:	1998	1999	2000	2001
Poultry				
Poultry Meat:	1,586,000	1,784,000	1,891,000	1,986,000
Eggs:	1,686,000	1,829,000	1,879,000	1,898,000
Pork:	960,000	989,000	1,034,000	1,040,000
COMPOUND FEED SECTOR				
		Last Year	Current Year	Out Year Forecast
Calendar Year:	1998	1999	2000	2,001
Compound Feed Capacity	24,500,000	28,600,000	30,030,000	31,531,000
Total Compound Feed Produced	17,937,000	19,335,000	20,301,000	21,316,000
----- by integrated producers	12,197,000	12,685,000	13,319,000	13,985,000
----- by commercial producers	5,740,000	6,650,000	6,982,000	7,331,000
FEED GRAIN USE				
		Last Year	Current Year	Out Year Forecast
Marketing Year:	1998	1999	2000	2001
Corn (Domestic consumption: feed)	4,320,000	4,400,000	8,600,000	8,858,000
Other (specify)	N/A	N/A	N/A	N/A
PROTEIN - ENERGY USAGE				
		Last Year	Current Year	Out Year Forecast
Marketing Year:	1998	1999	2000	2001
Total Protein Meal (feed waste domestic consumption)	4,035,000	4,284,000	4,476,000	4,610,000
Soy Bean Meal (feed waste domestic consumption)	3,290,000	3,500,000	3,600,000	3,708,000
Other Protein Meal, e.g. Palm Kernel Meal, Rape Meal (feed waste domestic consumption)	745,000	784,000	876,000	902,000
Fish Meal	N/A	N/A	N/A	N/A
Palm Crude Oil (feed waste domestic consumption)	N/A	N/A	N/A	N/A
TRADE (Metric Tonnes)				
		Last Year	Current Year	Out Year Forecast
Calendar Year:	1998	1999	2000	2001
Corn				
Imports:	5,214,510	5,494,502	5,322,476	5,829,117
Exports:	225,188	11,568	3,985	7,334
Soy Beans				
Imports:	3,846,000	1,066,000	3,985,000	4,486,000
Exports:	360	796	1,728	157
Soy Bean Meal				
Imports:	106,051	217,970	133,298	284,925
Exports:	87	228	116	8,203
Fish Meal				

Imports:		3,282	2,671	2,724	2,778
Exports:		690	547	552	557
Palm Crude Oil					
Imports:		132,593	92,328	100,102	100,000
Exports:		2	0	2	0
PROTEIN PRODUCTS TARIFFS AND TAXES		Bound Rate (%)	Applied Rate (%)	Other Import Taxes/Fees	
Report Year:	Product Description 1/				
0505.90	FEATHER MEAL	41.6	13.0	N/A	
1501.00.00.60	YELLOW GREASE	265.2	260.0	N/A	
1502.00.00.40	INEDIBLE TALLOW	18.8	10.0	N/A	
1511	PALM OIL	47.0	10.0	N/A	
1518	ANML/VG FTS &OILS	47.0	10.0	N/A	
2301.10	MEAT AND BONE MEAL	41.6	18.0	N/A	
2301.20	FISH MEAL	41.6	18.0	N/A	

SECTION III. NARRATIVE ON SUPPLY, DEMAND, POLICY, & MARKETING

Production General

Total oilseed production in Mexico is expected to decrease approximately 25 percent in MY 2002/03, due to financial uncertainties caused by the current slowdown in the Mexican economy and low prices for soybeans and cotton. As a result, a shift in the balance among different crops is expected. Soybean production, which last year represented about 29 percent of all Mexican oilseed output, is expected to increase to approximately 37 percent in MY 2002/03. Peanut production will likely represent 40 percent of total oilseed production in MY 2002/03 compared to 30 percent a year ago, due to the severe contraction in cotton production. Cotton producers discouraged by low prices, weak demand and insufficient government support, have reduced sharply their planting intentions for the MY 2002/03, approximately 60 percent lower than a year ago.

According to Mexico's National Association of Oils, Fats and Shortening (ANIAME), the official program to develop production of African palm oil in the states of Tabasco, Veracruz, Campeche and Chiapas has been hampered by budgetary problems. Reportedly, only 5,500 hectares are currently producing, far from the hoped-for 2002 program objective of 20,000 hectares.

A per hectare base payment of 874 pesos per hectare (US\$98/acre) will be given to soybean, cotton, and other crops for the spring/summer 2002 crop cycle and for the fall/winter crop of 2002/03. These payments are part of the PROCAMPO program. This payment is 5.43 percent greater than what the Secretariat of Agriculture, Livestock, Rural Development, Fisheries and Foodstuffs (SAGARPA) paid during the same period in 2001/02. Private sources pointed out that despite the set of supports that the GOM released last year to promote soybean and cotton production (See MX1051), it had an imperceptible impact.

Soybean Production

Mexican soybean production is expected to remain practically unchanged in MY 2002/03, due to depressed soybean prices, insufficient supports and general uncertainty in the markets. For MY 2002/03 (Sept-Aug), the initial production forecast is 127,000 MT, based on private projections. For MY 2001/02, the soybean production estimate has been increased based on updated Mexican official data. Production of soybeans, by state, for the 2001 spring/summer crop year is as follows:

PRODUCTION OF SOYBEANS, BY STATE, FOR
THE 2001 SPRING/SUMMER CROP YEAR

State	Area Planted (Hectares)	Area Harvested	Production (MT)	Yield (MT/Ha)
Sinaloa	23,967	23,638	47,350	2.0
Tamaulipas	27,425	24,495	30,516	1.2
Chiapas	11,978	11,955	27,500	2.3
San Luis Potosi	6,045	5,269	3,952	0.8
Veracruz	3,645	3,548	5,890	1.7
Other	835	506	112	0.2
TOTAL	73,895	69,411	115,320	

Source: SAGARPA, Secretariat of Agriculture

ANIAME considers SAGARPA's production estimate to be too high. In fact, it estimates that soybean production for the 2001 spring/summer crop will be no more than 85,000 MT. Official sources, however, insisted that the larger output is due to an increase in harvested area in Sinaloa, where all crop land is irrigated. Moreover, above-normal precipitation during the past year in the central part of the state significantly increased reservoir levels in the main dams. FAS/Mexico uses official Mexican government statistics for historical purposes. The MY 2000/01 production estimates of 103,000 MT as well as the figure for area harvested, reflects official Mexican government data.

Cottonseed Production

The outlook for the Mexican cotton production in MY 2002/03 (August-July) is totally depressed as producer prices remain unattractive. Production is expected to decrease to 220,000 bales in 2002, based on a sharp reduction in planted area. According to the Confederation of Mexican Cotton Associations, it is already evident that the area planted in MY 2002/03 will be substantially less than the revised estimated of last year (118,000 has). The confederation also stated that the sluggish demand for domestic cotton is also depressing prices. Moreover, insufficient government support is contributing to an expected decrease in cotton production for MY 2002/03.

The cotton production estimate for MY 2001/02 has been revised upward, due to better than expected growing conditions and increased planted area. For MY 2000/01, both planted and harvested area estimates have been revised upward to reflect new official Mexican data.

Peanut Production

According to industry sources, given normal weather conditions, peanut production is forecast to increase slightly in MY 2002/03 compared to last year. Despite the fact that planted area was lower than previously estimated, production was slightly higher in MY 2001/02 than a year before, due to favorable weather in the main producing areas such as Chihuahua and Puebla. In Chihuahua, for example, crop conditions during the growing season were much better than last year and contributed to good yields. The MY 2000/01 production estimate as well as the areas planted and harvested have been revised downward reflecting official Mexican government statistics. Reportedly, many Mexican processors are experiencing reduced demand. These processors are facing a slowdown in the economy, with higher retail prices for their products and weaker purchasing power. Industry sources see little chance for near-term improvement.

Consumption, Total

Only a marginal increase in consumption of oilseed products for MY 2002/03 is expected as a result of economic slowdown and sluggish demand. The livestock sector, however, is benefitting from the low soybean prices. Poultry producers indicate that although the market for poultry meat continues to grow, the cost of production has remained more or less stable. The poultry industry is a major consumer of soybean meal. Therefore, total oilseed demand for MY 2002/03 is expected to increase 2.7 percent compared to revised MY 2001/02. The total oilseed consumption estimates for MYs 2000/01 and 2001/02 have been revised downward based on more current industry information.

For soybeans, consumption is expected to continue to rise by approximately 4 percent as a result of higher consumer demand for soybean oil products. Despite the economic slowdown, the outlook for the livestock sector, especially poultry and hogs, continues to brighten, thereby driving demand for imported beans and meals, which come mainly from the United States.

According to ANIAME, investment in new crushing plants and increased capacity continued during CY 2001. Two new crushing plants to extract palm oil, for example, were opened in Chiapas and Campeche. This trend is expected to continue in the foreseeable future.

For cottonseed, MY 2002/03 consumption is expected to increase slightly at 460,000 MT as the dairy industry continues to prefer it over other alternatives, such as rapeseed. The consumption estimates for MYs 2000/01 and 2001/02, have been revised downward and upward, respectively, to reflect more recent information.

Consumption of rapeseed in MY 2002/03 is expected to decrease slightly, as prices have increased. As in previous years, price and credit availability, rather than quality or strong consumer preference, continue to drive Mexican importers' decisions to purchase oilseeds and oilseed products. Rapeseed consumption estimates for MYs 2000/01 and 2001/02 have been revised downward according to ANIAME data.

For sunflower seed consumption, the MY 2001/02 estimate has been revised downward based on ANIAME information. As previously mentioned, importers have shifted from sunflower seed to soybean purchases, due to attractive prices and the availability of credit from soybean suppliers. For MY 2002/03, sunflower seed consumption is expected to increase slightly, due to better prices.

Trade, Total

For MY 2002/03, Mexico's soybean imports are expected to increase approximately 3 percent. The main factor behind this growth is the fairly positive outlook for Mexico's hog and poultry sectors. In the case of the poultry industry, poultry meat and egg sectors are expecting to grow 6 and 3 percent respectively in MY 2002/03 (see MX 2014). It should be noted that the MY 2002/03 soybean import estimate assumes that the Government of Mexico will not enforce any regulation against transgenic soybeans (see MX2027). The soybean import estimate for MY 2000/01 has been revised downward reflecting official information from the Secretariat of Economy (SE). Note that there are differences between U.S. export and Mexican import data.

The United States, along with Brazil, will continue to be the main suppliers of oilseeds to the Mexican market. Thanks to their geographic proximity and lower freight costs, U.S. suppliers should remain price-competitive and continue to marginally increase their market share. Imports of oilseeds are expected to increase approximately 3 percent in MY 2002/03.

Canada has continued to be the primary canola supplier (which is counted in the rapeseed PSD) to the Mexican market. Canola imports decreased from 1.0 MMT in CY 2000 to 885,000 in CY 2001 in response to unfavorable international prices. This decrease was offset by an increase in soybean imports. This trend is expected to continue in MY 2002/03 given higher international canola prices. Peanut and cottonseed import estimates for MY 2000/01 were adjusted downward based on SE's official numbers. For MY 2002/03, cottonseed imports are forecast to increase to 350,000 MT, as a result of lower domestic production and strong demand from the dairy sector.

Mexico's MY 2002/03 peanut exports are forecast at 4,000 MT. Meanwhile, imports are forecast to increase for MY 2002/03, due to favorable international prices. The United States, Nicaragua and Argentina will continue to be Mexico's main suppliers. As a result of lower prices, peanut imports from Argentina have become very attractive for Mexican importers. Traditionally, Argentina has been one of Mexico's principal peanut suppliers. Argentina's good crop quality and attractive prices in CY 2001, impelled Mexican importers to increase Argentine peanut imports by approximately 33 percent in CY 2001.

Under NAFTA, the United States established a duty-free TRQ for Mexican peanuts (shelled/in-shell). This TRQ quantity has increased 3 percent per year; over-quota duties declined by 15 percent each year between 1994 and 2000, and will reach zero by 2008. Industry sources indicated that Mexican suppliers should easily fill the NAFTA peanut quota of 4,277 MT in 2002. Peanut exports estimated for MYs 2000/01 and 2001/02 were revised downward based on SE data.

Policy

The dutiable season for soybeans is October 1 through December 31, during which U.S. soybeans will be charged 1 percent. The tariff will be zero on January 1, 2003.

Marketing

Mexico will continue to be a net importer of oilseeds and the U.S. will continue to be the principal supplier, although there is the possibility of competition from Canadian rapeseed. Oilseed demand, however, is price elastic, which causes substitution among competing oilseeds. Therefore, price will continue to be the overriding factor in marketing the product.

OIL MEALS**Production General**

As in past years, high protein soybean meal accounts for more than 80 percent of total Mexican oil meal production. Production of oil meal from imported rapeseed and canola seed, account for approximately 11 percent of total meal usage and is expected to increase 2 percent, due to higher oilseed imports. Meal production estimates for MYs 2000/01 and 2001/02 were revised downward from previous estimates, reflecting updated industry information.

Consumption

With the anticipated recovery of the Mexican economy in late MY 2002/03, consumption of all oil meal products should increase, but it is expected that imported products will meet most of the increased demand. Soybean meal is likely to continue to be the ingredient of choice for the poultry and swine industries. Rapeseed meal consumption should continue at approximately 10 to 11 percent of total meal consumption. Both rapeseed and cottonseed meal are used mainly by the dairy industry. Total oil meal consumption figures were revised downward for both MYs 2001/02 and 2002/03, reflecting the most recent information.

Soybean meal consumption increased in MY 2001/02 over last year's revised estimate and is expected to continue increasing, due to the expanding poultry industry. The forecast for the swine industry is expected to improve slightly in MY 2000/01; in particular, large producers with vertically integrated operations could expand production and their use of protein meals.

The cottonseed meal consumption estimate was revised upward in MY 2001/02, due to a slight recovery in the dairy sector. Increased fluid milk production is expected in MY 2002/03; this, combined with better herd management, should raise consumption.

Rapeseed meal consumption estimates for MY s 2000/01 and 2001/02 were revised downward, due to uncompetitive prices relative to other oil meals and its high acid content. However, for MY 2002/03, consumption of rapeseed meal is expected to increase, due to expected growth in the dairy industry.

The consumption of sunflower seed meal has been revised downward in MY 2000/01 to 15,000 MT, due to high prices. For MY 2002/03, however, a slight increase of consumption is forecast, due to the expectation of more affordable prices and an economic recovery by the end of 2002.

Trade

Meal imports continue to makeup an increasing percentage of supply. In MY 2000/01, imported meal accounted for 8 percent of total meal availability. In MY 2001/02, this increased to 10 percent and is forecast to increase approximately 13 percent in MY 2002/03, reflecting lower international prices. Soybean and sunflower seed meal imports were revised downward in MY 2000/01, according to official statistics released by SE. For MY 2002/03, however, soybean meal is forecast to rise given dynamic demand within the poultry industry.

The rapeseed and cottonseed meal estimates for MY 2000/01 were revised upward in line with SE's official data. This trend is expected to continue in MY 2002/03 given the continued demand of the dairy sector.

Marketing

Protein meal imports remain a function of price. Since the opening of the Mexican market, crushers are able to import less expensive meals, if they are available. The import market is driven by border prices.

OILS

Total oil production figures were revised upward for MYs 2000/01 and 2001/02, due to increased crush, mostly from imported beans. Production for MY 2002/03 is expected to increase approximately to 5 percent. Industry sources stated that the crushing pace continues to be largely determined by domestic demand for oil meals and the livestock that consume it. Increased demand for oil is expected to be met by domestic oil production.

Soybean oil is the major oil produced domestically, accounting for 61 percent of total production in MY 2002/03. For the past two years, around 95 percent of domestically produced soybean oil had its origin in imported product from the United States. That figure is expected to remain constant in MY 2002/03.

Rapeseed oil production is forecast to account for approximately 27 percent of total oil production in MY 2002/03, a lower share than a year ago. For MYs 2000/01 and 2001/02, the rapeseed oil production estimates have been lowered from previous estimates, due to unfavorable seed prices. This negative trend in rapeseed oil production is expected to continue in MY 2002/03. At the same time, the sunflower seed oil production estimate for MY 2001/02 has been revised downward based on new information provided by industry sources. Production decreased from previous years, due to high seed cost and competition from lower-priced oils like corn oils. For MY 2002/03, sunflower seed oil production is expected to remain unchanged, as seed prices continue to be unattractive.

Palm oil production is forecast to increase to 14,000 MT in MY 2002/03, due to expected higher yields. According to ANIAME, approximately 3,000 has. were planted in MY 2001/02. Yields should increase in the second year of production, as the palms have matured. Palm oil production estimates for MYs 2000/01 and 2001/02 have been revised upward, reflecting ANIAME information and new SAGARPA data. Production of coconut oil is also forecast to increase in MY 2002. According to ANIAME information, approximately 60 percent of coconut oil is consumed by soap manufacturers and the remaining 40 percent is used for margarine production.

Consumption

Total oil consumption figures from MYs 2000/01 and 2001/02 have been revised upward from previous estimates to reflect more recent information. Consumption is expected to increase in MY 2002/03 assuming there will be low oil prices during the remainder of the year. As domestic vegetable oil prices continue to be depressed, demand by the industrial and retail sectors should help improve the overall demand situation for oils. According to industry sources, oil processors continue to compete fiercely with each other to gain market share through discounts in retail prices. A similar situation is occurring with oil prices in the industrial sector.

Soybean oil is the dominant vegetable oil consumed in Mexico, holding a 51 percent share of the market. Food processing and blending with other oils continue to account for most consumption. Rapeseed oil is expected to maintain a 24 percent market share in MY 2002/03. Rapeseed oil consumption estimates for MYs 2000/01 and 2001/02 were revised downward, as a result of higher international prices. As already mentioned, prices continue to be the main factor in marketing the product.

Sunflower oil's share of the Mexican market decreased to 3 percent in MY 2001/02 from 5 percent the previous year, due to uncompetitive prices. This market share is expected to continue in MY 2002/03 as a result of unattractive prices. Most of the sunflower seed oil is sold to retail consumers as cooking oil. Lesser amounts are sold at wholesale for industrial uses, including the snack food and bakery industries. Cottonseed oil estimates for MYs 2000/01 and 2001/02 were revised downward and upward, respectively, based on revisions by ANIAME and SAGARPA. Cottonseed oil consumption is forecast to increase 2 percent in MY 2002/03.

MYs 2000/01 and 2001/02 consumption estimates for coconut oil have been revised downward, based on revisions by ANIAME and SAGARPA. However, for MY 2002/03, consumption is forecast to increase by 3 percent from the current year. The palm oil consumption estimate for MY 2000/01 has also decreased, reflecting more recent information from ANIAME. Similarly, a 3 percent increase for palm oil is expected during MY 2002/03.

Trade

With the ongoing slowdown of the Mexican economy, oil imports are forecast to decline approximately 3 percent for MY 2000/01. Palm oil in MY 2002/03 is forecast to account for 44 percent of total oil imports, while rapeseed and soybean oils are forecast to account for 21 and 18 percent, respectively.

Soybean oil imports are expected to decrease approximately 35 percent in MY 2002/03. Industry sources stated that with the expansion of crushing capacity and the expectation of affordable international oilseed prices, this trend could continue in the coming years. The soybean oil import estimates for MYs 2000/01 and 2001/02 were revised downward based on revised SE's information.

For sunflower oil, import estimates for MYs 2000/01 and 2001/02 have been lowered based on revised Mexican data. Importers expect this trend will continue in MY 2002/03, due to unaffordable international prices. SE's official statistics indicate that the United States was Mexico's main supplier of sunflower oil in CY 2001. For rapeseed oil, import estimates for MYs 2000/01 and 2001/02 have increased, reflecting official data. According to industry sources, there is a relatively high substitutability between soybean oil and sunflower and rapeseed oils. Price continues to be the overriding factor in marketing vegetable oils and oilseeds in the Mexican marketplace. For palm oil, the import estimate has been lowered for MY 2000/01, reflecting revised official data. Also, the MY 2001/02 palm oil import estimate was revised upward based on revised SE data.

**INDICATIVE OILSEED PRICES
CRUDE OIL
(U.S. Dollars/MT)**

Oil	October 2001	March 2002	Delivered
Soy (S.Am)	370.00	389.00	Veracruz
Sun (S.Am.)	550.00	575.00	Veracruz
Cotton(rail)	N/A	N/A	
Rapeseed	470.00	490.00	Colima
Palm	385.00	390.00	Veracruz

Source: ANIAME

Trade Policy

On March 22, 2002, SE announced in the Mexican Federal Register ("Diario Oficial) new import duties for palm oil, coconut oil and almond oil (see the table below). According to SE sources, the new approved import duties are the highest rates allowed by the World Trade Organization (WTO) for these oils. This provision will be temporary for coconut and almond oil (until March 31, 2002). This measure was reportedly aimed at protecting local coconut and palm almond oil producers.

**NEW IMPORT DUTIES FOR PALM OIL,
COCONUT OIL AND ALMOND OIL**

H.S. Code	Description	Import Duty (%)
1511.10.01	Palm Oil (crude oil)	10
1511.90.99	Palm Oil (refined oil)	20
1513.11.01	Coconut Oil (crude oil)	45
1513.19.99	Coconut Oil (refined oil)	45
1513.21.01	Almond Oil (crude oil)	45
1513.29.99	Almond Oil (refined)	45

Source: The Secretariat of Economy

As there is a high degree of substitution between coconut and palm almond oils, SE considered it necessary to temporarily increase the duties as a short-term strategy aimed at increasing the earnings of local producers. It should be noted, however, that this new tariffs only applies to countries that do not have a free trade agreement with Mexico; consequently, it will not affect U.S. exports of these products.