



USDA Foreign Agricultural Service

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## Mexico

## Food Processing Ingredients Sector

## Annual

## 2005

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**Report Highlights:**

Mexico offers strong opportunities to the US processed food ingredient supplier. Imports to the sector grew 23 percent from 2001 to 2003 and the US has the largest important share in every major category of the sector including baked goods, snack foods, meat and dairy. The Mexican food processing industry is estimated to have produced almost \$45 billion worth of goods in 2004.

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Includes PSD Changes: No  
Includes Trade Matrix: No  
Annual Report  
Mexico (MX)  
[MX]

## Section I. Market Summary

Mexico offers strong opportunities for suppliers to the processed foods sector. The demand for processed foods is increasing and the industry is keeping pace; the sector grew by an average 9.2 percent annually from 2000 to 2003. US suppliers dominate Mexican imports of raw materials for the sector and are well positioned to capitalize on increased demand for high quality food ingredients. According to the Mexican Secretary of Commerce Business Registry (SIEM), there are 8,111 food manufacturing companies processing a wide range of products including red meat, poultry meat and fish products, dairy products, baked goods, snack foods, prepared fruit and vegetables, oilseed products, beverages, specialized food ingredients and prepared meals. The industry produced \$39.8 billion worth of goods in 2003 and the sector is expected to produce \$44.9 billion in 2004. Trade statistics also provide a favorable picture for US suppliers to the food-processing sector. Mexico imports from the United States six times as much raw material<sup>1</sup> for the industry as it exports. Imports grew 23 percent while exports only ten percent between 2001 and 2003. The figures indicate a strong and growing dependence upon foreign suppliers to the industry.

**Production Value of Mexico's Food Processing Industry (USD Millions)**

Industry	(1) Number of Firms	(2) Total Inputs	(3) 2000	2001	2002	2003	Growth 2000-2003
Meat and Poultry	468	1,647	2,440	2,555	2,571	2,454	0.6%
Dairy	366	3,387	3,684	4,005	3,982	5,455	48.1%
Canned Foods	93	1,294	2,216	2,505	2,559	2,157	-2.7%
Fish and Seafood	42	190	275	292	309	318	14.0%
Flour and Grains	882	1,130	1,284	1,366	1,399	1,504	17.1%
Baked Goods	3,916	1,344	1,853	2,090	2,222	2,879	55.4%
Vegetable Oil	61	1,396	1,951	2,008	2,020	1,928	-1.2%
Confection	249	358	861	861	930	792	-8.0%
Snack Foods	1,059	862	1,949	2,106	2,045	1,934	-0.8%
Other (coffee, gelatins, yeast, concentrates, etc.)	164	1,448	3,198	3,327	3,390	2,921	-8.7%
Animal Feed	149	1,302	1,599	1,775	1,775	1,714	7.2%
Beverage Industry	608	5,851	11,030	12,006	12,870	12,634	14.5%
<b>Total</b>	<b>8,111</b>	<b>21,742</b>	<b>34,192</b>	<b>37,264</b>	<b>38,260</b>	<b>39,834</b>	<b>16.5%</b>

Source: (1) SIEM; (2) INEGI Encuesta Industrial Anual 2001; (3) INEGI Encuesta Industrial Mensual 2004

The following imports of raw materials for the food processing sector experienced the highest rates of growth from 2001 to 2003:

Sunflower seeds (805%)	Fresh and frozen meat (94%)
Various seed oil (223%)	Seafood other than fish (85%)
Olive-Residue oil & Blends (205%)	Pig, poultry fat, rendered (83%)
Flour & Meal of oilseeds (162%)	Rye grain (81%)
Potato flour, meal flakes (155%)	Tree nuts (70%)
Flaxseed (155%)	Fish, fresh or chilled (66%)

<sup>1</sup> Based on 70 categories of "food ingredients" from government statistics in determining the trade balance between the United States and Mexico.

### Advantages/Challenges for US Exporters Targeting Mexico's Food Processing Sector

Advantages	Challenges
The United States is already the leading supplier of ingredients to Mexico's food processing industry.	The European Union, Chile and other Central American and South American countries have free trade agreements with Mexico giving them preferential duties for some products.
Geographical proximity gives US exporters a competitive advantage over third country suppliers.	As Mexico's transportation and distribution infrastructure improves, other countries will be able to deliver product more efficiently to the Mexican market.
Because of NAFTA, US products have preferential import duties compared to products from many third country suppliers. As of 2003, most US food and agricultural product exports to Mexico are duty-free.	Commercial barriers such as labeling, phytosanitary and sanitary regulations and NOMs (Mexican quality standards) continue to pose obstacles for importing some US products.
Rising per capital income, more women in the work force, and increasing foreign investment are driving the demand for processed foods.	US firms must aggressively solicit new business and establish in-country sales and servicing infrastructure.
Raw materials for the industry imported from the US by Mexican food processors are subject to less stringent labeling requirements.	US exporters still must comply with all sanitary and phytosanitary requirements, which are frequently modified.
Mexico's domestic production of milk powder, lactose and sweet whey, poultry, red meat, cocoa, grains and flour, canned fruits, sugar, cereals and pet food cannot meet domestic demand. (Source: Bancomext)	Imported products are relatively more expensive and require advance order time.
Mexican processors view US ingredients such as red meat, pork, dairy, poultry and other products as having high quality.	Strong competition from local producers and increasingly from Asian and European suppliers.

## Section II. Market Entry and Trends

### A. First steps to market entry

Because of the personal nature of conducting business in Mexico, US companies wishing to serve the food-processing sector must establish strong relationships with buyers. The question is: how to build these relationships? US suppliers have essentially two options.

*Sell through a Mexican distributor/representative.* For low-volume or perishable products, Mexican food processors may insist on purchasing from a local supplier. Thus, the US company should consider a Mexican distributor of similar but non-competitive products. The representative may act merely as a sales agent taking orders for product shipped directly, or may also serve as importer who stocks and distributes the product through its own sales force.

*Establish a Mexican sales subsidiary, basically sell direct.* Foreign firms with higher sales volume frequently have their own representative offices in Mexico, providing sales support and/or warehousing with distribution services. Companies in the food processing sector prefer these direct sales to working through a distributor.

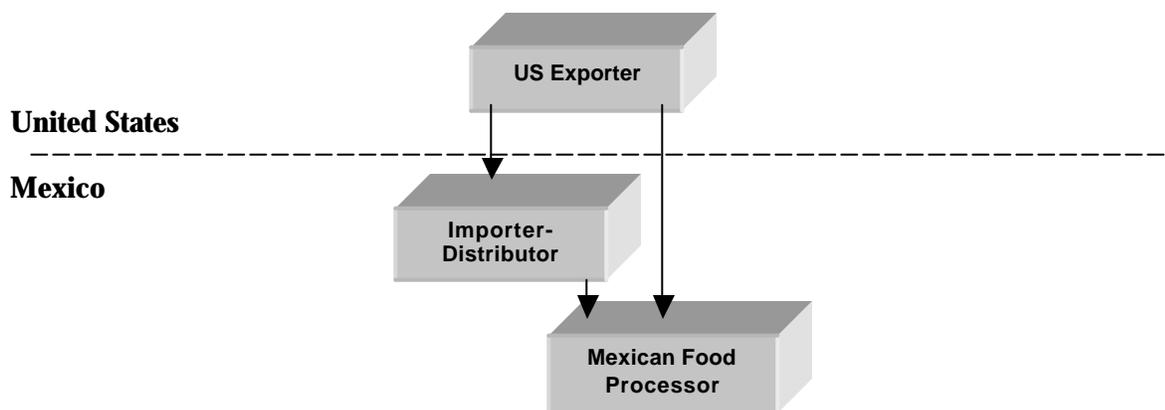
A good first step for US suppliers is to visit Mexico and meet with potential customers and distributors. The Agricultural Trade Offices in Mexico City can help provide contacts lists, suggest specific events and shows relevant to your product, and can set up meetings through our Ag Aide program. See *Section V.* of this report for the contact information.

Visiting with food processors and their buyers in Mexico yields several advantages. First, it gives the US company a general feel for the market. Second, it allows the US exporter to identify specific needs. Third, it will tell the prospective exporter whether the market is worth pursuing. Finally, the visit will help determine the best method to distribute their product.

US suppliers can also consider attending a trade show in Mexico. Mexico does not host an event focusing exclusively on servicing the food processing sector in general. However, there are individual shows for groups of products such as confectionaries (Confit Expo), meats (Expo Carne) and others. For a list of these shows please see GAINS report MX4316 from October 2004. Attending such a show allows US firms to simultaneously investigate the market, meet with buyers and interview potential distributors.

## B. Market Structure

The majority of raw materials used by food processors are purchased directly from the producer through their local direct-hired representative in Mexico. Grupo Herdez (canned goods and sauces), Unilever (vegetable oil and ice cream), Grupo Modelo (beer), Jugos del Valle (non-alcoholic beverages), and Ricolino (candy) reported that they purchase approximately 75 to 80 percent of their raw materials from a supplier with local representatives. Almost all the companies interviewed prefer to deal with the local representatives of foreign raw material suppliers located in Mexico. For those that do not have a representative in Mexico, finding a distributor is critical to provide the link to the buyer.



### *Distribution and Transportation*

The first step towards distributing in Mexico is getting the product across the border. The method for distribution and transportation is an important consideration for exporters when selecting a distributor or import process because Mexican food processors consider several factors when deciding between domestic and imported raw materials and transportation costs and potential delays are chief among these. Also, because Mexico's climate is often hot and varied, storage and refrigeration costs are also considered. Since the largest Mexican markets for processed food products are located in the interior of the country, ground

transportation is the most logical option for delivery. The Mexican national railway is antiquated, although recent privatization will increase its usage for bulk shipments. Maritime transportation of bulk commodities may be considered for delivery to Cancun. Bimbo, for example, imports wheat from the United States, which is shipped to Merida and then transported by truck to the company's main processing plants.

Trucking companies cannot bring merchandise directly from the United States to Mexico. A US trucking company drives the shipment to the border and transfers its trailer to a Mexican rig. The best way to ship by truck is to use an internationally bonded carrier that has relationships with Mexican carriers. Thus, US exporters typically are only responsible for delivering to the border where the importing company takes care of transporting the goods to the processing plant.

### C. Sector Trends

#### *Foreign Direct Investment*

Between 1999 and 2004, \$3.86 billion in foreign direct investment (FDI) flowed into 645 of Mexico's food, beverage, and tobacco firms. Of these, the United States invests in 315 companies, or about 50 percent of the total. The types of firms that receive investment are food processors, 19.4 percent; soft drink manufacturers, 16.4 percent; fruits and vegetable processors, 7.1 percent; and 5.1 percent of the FDI went to other types of food firms.

Examples of some of the larger companies with foreign investment include: Grupo Modelo (35 percent Anheuser Busch); Harinera la Espiga (affiliated with General Mills); Gamesa (100% Pepsico); Agroindustrias del Noroeste (Smithfield Foods); Carroll's Foods de Mexico S.A. de C.V. (Carroll's Foods, Inc); Farmland Industrias, SA (Farmland, Kansas City, MO); Tyson de Mexico, S.A. de C.V. (Tyson USA); Delimex de Mexico S.A. de C.V. (Heinz Corporation); Gollek Interamerica, S. de R.L. de C.V. (Kellogg's Company); Grupo Herdez, S.A. de C.V. (McCormick Inc. / Hormel Foods, USA); Grupo La Moderna, S.A. de C.V. (Miller Milling Co.); J.M. Smucker de Mexico, S.A. de C.V.; and Kellogg de Mexico, S.A. de C.V. (Kellogg Company).

#### *Plants Abroad*

Successful Mexican processing companies have expanded beyond Mexico, and this growth is expected to continue in the US and will expand further to other parts of Latin America. Examples of foreign expansion from Mexico include:

- Grupo Bimbo (Bimbo Bakeries USA) operations in 17 plants in California, Texas and Ohio, as well as facilities in Latin America (in total, 29 plants abroad);
- Grupo Industrial Maseca (Gruma Corporation, Irving, Texas) production of tortillas and tortilla flour in the US through two companies: Azteca Milling (five plants producing tortilla flour) and Mission Foods (14 plants producing tortillas, chips, and snacks);
- Jugos del Valle production in Brazil, which represents approximately eleven percent of the company's sales;
- Grupo Modelo's malting plant in the United States;
- Ricolino, the confection line of Grupo Bimbo's plants in the United States and the Czech Republic.

### *Consumption Trends*

The food processing sector is responding to changes in consumption trends in Mexico. Based on national statistics more women are working, comprising approximately 39.3 percent of the formal workforce in 2003 increasing the demand for already prepared meals and ready to eat fruits and vegetables. In addition, Mexican consumers are increasingly interested in healthy products, so the food processing sector is responding with healthier options. Certain products and product flavors are increasingly popular and the food processing sector is adapting to those needs. For example, lime and chile flavored snack foods, nut mixes and yougurts have all experienced 50 percent or more growth in sales in the last five years. The industry is becoming increasingly responsive and flexible to product specific demand.

### *General Industry Trends*

Following are some of the important trends in Mexico's processed food industry:

- *Growth in the market in general.* Mexico's food processing sector has been expanding at a brisk pace of 5.2 percent per year over the past three years.
- *Multi-grain/wheat bread.* Multi-grain bread production, mostly from small and mid-sized bakeries, increased from 78,000 tons in 1999 to 115,000 tons in 2002, a 47 percent increase. According to national statistics, annual domestic production of wheat bread/wholemeal bread has grown by more than 35,000 tons between 1999 and 2002.
- *Foreign investment.* Although foreign investment dropped significantly in 2002, the food processing industry remains one of the principal sectors for foreign investment receiving \$3.86 billion from 1999 to 2004.
- *Joint ventures.* Joint ventures are becoming more popular. For example, Sigma Alimentos established a subsidiary in alliance with ConAgra Foods for prepared meals using the brand names Banquet, Sugerencias del Chef, El Cazo Mexicano and Menu del Sol. Sigma also has distribution rights for Oscar Mayer products.
- *Some imported goods are being replaced by growing domestic production.* It is not cost effective to export some locally available produced products, such as fresh fruit and vegetables, because of high freight costs.
- *Demand for high quality ingredients.* Although Mexican food processors tend to be price-sensitive, they also demand high quality ingredients for increasingly sophisticated products.

### **Section III. Competition**

Domestic suppliers are the biggest competitors to US exporters of ingredients to Mexico's food processing industry. Regarding imports, the competition varies depending on the wide variety of products used as food ingredients. The following list provides a summary of the main competitors in each subsector:

#### *Meat*

- Top suppliers of imports: United States (84%), Canada (9%) and Australia (3%)

#### *Dairy*

- Top suppliers of imports: United States (42%), New Zealand (25%) and Uruguay (5%)

*Baked Goods*

- Top suppliers of imports: United States (56%), Ireland (8%) and Germany (5%)

*Snack Foods*

- Imports are still dominated by the United States with over a 95 percent import market share

*Beverages*

- Top suppliers of imports: United States (41%), Spain (16%), France (9%)

*Flour and Grains*

- Top suppliers of flour imports: United States (91%), France (5%) and Spain (2%)

**Section IV. Best Product Prospects****A. Products Present in the Market which have Good Sales Potential**

- |                                 |                    |                            |
|---------------------------------|--------------------|----------------------------|
| - Red meat                      | - Fluid milk       | - Cheese including cheddar |
| - Pork meat                     | - Sweet whey       | - Imported Cheese          |
| - Beef cuts boneless            | - Milk powder      | - Soybean and soybean oil  |
| - Turkey meat                   | - Not-fat dry milk | - Soybean meal             |
| - Chicken meat                  | - Butter           | - Rape and colza seeds     |
| - Marinated poultry             | - Lactose          | - Fruit flavored drinks    |
| - Mechanically de-boned poultry | - Spicy candy      | - Pizza crust              |
| - Bovine, sheep and goat fat    | - Sunflower        | - Dry soup preparations    |
| - Chicken and turkey parts      | - Wheat flour      | - Instant soups            |
| - Raw turkey                    | - Linseed          | - Concentrates             |
| - Pepperoni                     | - Yogurt           | - Multi-grain baked goods  |
| - Italian sausage               | - Breakfast bars   | - Mixed and salted nuts    |
| - Mixed fruit juice             | - Ice cream bars   |                            |

**B. Products Not Present in the Market in large quantities which have Good Sales Potential**

- |                 |  |
|-----------------|--|
| - Malt Extracts | - Cookie Dough and Baking mix inputs           |
| - Spices        | - Natural and artificial spices and flavorings |
| - Meal flakes   | - Sunflower seeds                              |
| - Potato flakes |  |

**Section V: ATO Contact Information**

If you would like to learn more about what services the U.S. Agricultural Offices (ATO) in Mexico can provide, please contact us. Our email, telephone and facsimile numbers are listed below. We look forward to working with you to promote exports of US agricultural products to Mexico.

**US Agricultural Trade Office, Mexico City, Mexico**

Bruce Zanin, Director  
Jaime Balmes 8-201  
Colonia Polanco  
11510 Mexico, D.F.  
Tel: (011-5255) 5280-5291; 5281-6586  
Fax: (011-5255) 5281-6093  
Email: atomexico@usda.gov

**US Agricultural Trade Office, Monterrey, Mexico**

Dan Martinez, Director  
Oficinas en el Parque Torre II  
Blvd. Diaz Ordaz No. 140, Piso 7  
Col. Santa Maria, 64650  
Monterrey, Nuevo Leon  
Tel: (011-5281) 8333-5289  
Fax: (011-5281) 8333-1248  
Email: atomonterrey@usda.gov

## Appendix I. Largest Food Processors in Mexico

Company	Industry	Sales US\$ Millions 2003	End-Use Channel	Production Location	Procurement
Agro Industrial Exportadora, S.A. de C.V.	Processed fruit and vegetables	1,280**	Export	Jalisco	
Alfa, S.A. de C.V. (holding); Sigma Alimentos S.A. de C.V.	red meat, poultry, dairy, prepared and frozen meals	4,177;105	Retail	Nuevo Leon (2) (HQ), San Luis Potosi, Chihuahua, Jalisco (2), Hidalgo, Mexico City; Total: 8	Direct
Grupo Bafar S.A. de C.V.	red meat, poultry, and dairy	203	Retail	Chihuahua (HQ), Cd. Obregon; Sonora; Total: 2	Direct
Industrias Bachoco	tobacco, poultry, red meat and eggs	1,100*	Retail, HRI	Total: 400	Direct & Brokers
Grupo MacMa	prepared gourmet meals, cookies and confection	18*	Retail	Celaya, Gto.	
Qualtia Alimentos S.A. de C.V.	red meat, poultry products and dairy	NA	Retail	Nuevo Leon (HQ); Total: 3	Direct
Grupo Corvi	Confection	1,263**	Retail	Mexico City (HQ); Total: 4	Direct
Grupo Industrial Lala S.A. de C.V.	Dairy	NA	Retail	Nuevo Leon, Coahuila (HQ) Durango (4); Total: 7	Direct
Ragasa Industrias S.A. de C.V.	Oilseed	NA	Retail & Processors	Nuevo Leon (2) (HQ), Tamaulipas; Total: 4	Direct
Grupo Minsa	corn flour, tortillas and other products	188	Retail and Processors	Edo de Mexico (HQ), Sinaloa, Coahuila, Jalisco, Veracruz, Chiapas; Total: 6	
Grupo Bimbo S.A. de C.V.	confection, baked goods and snacks	4,166	Retail	Total: 44	Direct
PepsiCo Inc (holding); Gamesa S.A. de C.V.; Sabritas S.A. de C.V.	snack food	NA	Retail	Gamesa: Nuevo Leon (2) (HQ); Total: 8 Sabritas: Total: 7	Direct
Grupo La Moderna S.A. de C.V.	baked goods and wheat flour	265	Retail		
Nacional de Alimentos y Helados, SA de CV (Botanas Bokados)	snack food	NA	Retail	Nuevo Leon (HQ); Total: 1	Direct
Nutrisa	Health foods and snacks	30	Retail		Direct
Jugos del Valle S.A. de C.V.	fruit juice	367	Retail	Edo. de Mex, Mexico City (HQ), Nuevo Leon, Zacatecas, Baja California, Veracruz; Total: 8 Mexico, 1 Brazil	Direct & Brokers
Grupo Herdez	400 prod. - canned fruit and veg., pasta, sauces, etc.	455	Retail, HRI	Ensenada, Yavaros, S.L.P. (2), Celaya, Mexico DF (2), Cuemavaca, Veracruz, Chiapas; Total: 10	
Grupo Azucarera de Mexico (holding company)	Refined sugar and honey	64	Retail	Mexico City (HQ), Jalisco, Michoacan, Veracruz (2), Tabasco; Total: 5	
Fomento Economico Mexicano, S.A. de C.V. (FEMSA) (holding); Cerveceria Cuauhtemoc Motezuma	alcoholic drinks	7,248; 1,943	Retail & Food Service	Nuevo Leon (HQ); Total: 6	Direct & Distributors
Grupo Modelo	alcoholic drinks	3,743	Retail & Food Service	Zacatecas, Coahuila, Sonora, Sinaloa, Jalisco, Oaxaca, Mexico City (HQ); Total: 7	Direct
Grupo Continental (holding)	soft drinks	888	Retail & Food Service	Tamaulipas (HQ); Total: 17	Direct
Pepsico (holding); Grupo de Embotelladoras Unidas	soft drinks	329*	Retail	Guadalajara, Morelia, Uruapan and Celaya	Direct
Embotelladoras Arca	soft drinks	1,244	Retail & Food Service	Nuevo Leon (2) (HQ); Total: 18	Direct
Gruma S.A. de C.V. (holding); GIMSA S.A. de C.V., Molinera de Mexico S.A. de C.V., Gruma Corp.	corn & wheat flour, tortillas	2,057; 125, 51, 87	Processing Ind. & Retail; Bakery Industry, Retail & HRI	Nuevo Leon (HQ), Total: 17; Total: 9; USA: 13	Direct & Distributors

PepsiCo Inc (holding): Sonic's	confection	NA	Retail	Total: 1	Direct
Grupo Sanborns S.A. de C.V. (holding): Controladora y Administradora de Pastelerías S.A. de C.V.	bakery products	1,703; 75	Retail & Food Service	Total: 160	Direct & Distributors
Fomento Economico Mexicano, S.A. de C.V. (FEMSA) (holding): Coca Cola FEMSA	soft drinks	7,248; 3,168	Retail & Food Service	Total: 8	Direct
Nestle de México	Pet food, coffee, cereals, ice cream, powdered milk, confection, etc.	NA	Retail	Edo. de Mexico, Queretaro, Tlaxcala, Cuautepec, Chiapas, Jalisco, Puebla, Mexico City (HQ), Monterrey; Total: 16	Direct
Unilever de México	Ice Cream, margarine, sauce, vegetable oil	NA	Retail	Edo de Mex, Mexico City (HQ), Morelos; Total: 3	Mostly Direct

\* Figures from 2002, \*\* Figures of 000s USD, HQ = Headquarters  
Source: Bolsa Mexicana de Valores.

## Appendix II. Mexican Food Processing Industry Contacts

Organization	Contact	Address and Web Information	Telephone and Fax
Alfa SA de C.V.: Sigma Alimentos SA de C.V. (dairy and meat)	Daniel Moreno; Purchasing Director	Ave. Gomez Morin 1111 Sur Carrizalejo; Garza Garcia, N.L.; CP 66200; www.sigma.com.mx	Tel +52 (81) 8152 5100 ext 11349; Fax +52 (81) 8152 5100
Almidones Mexicanos (starch, glucose raw mat)	Guillermo O. Hope; Trade Import Export Manager	Calle 26 #2756; Col. Zona Industrial; 44940 Guadalajara Jal.	Tel: 52 (33) 3668-4520; Fax: 52 (33) 3668-4521
Arancia Com Products (corn milling and syrup)	Jesus Carlos Valencia; Trade Import Export Manager	Bldv Manuel Avila Camacho 2900; Piso 9; Fracc. Los Pirules; C. P. 54040 Tlalhepanla Edo. de Mex.; www.aracomproducts.com.mx	Tel +52 (55) 5366-5600; Fax +52 (55) 5366-5651
Cargill Servicios (dist. grains, sugar, and animal feed)	Robert Aspel; Trade Import Export Manager	Bosque de Queles 168, Piso 3; Col Bosque de las Lomas; 11700 Mexico City; www.cargill.com	Tel +52 (55) 5246 7400; Fax +52 (55) 5246-7891
Cerveceria Cuauhtemoc-Moctezuma (beer)	Emilio Herrera; Trade Import Export Manager	Bldv de los Ferrocarriles 247; Col Industrial Vallejo; 02300 Mexico City; www.femsa.com	Tel: 52 (55) 5333-2400; Fax: 52 (55) 5333-2419
Chupa-Chups Industrial Mexicana (lollipops)	Emilio Martinez Garcia; Plant Manager	Av. Central Mza. 5 y 6; Col. Pque Industrial; 50200 Toluca Edo de Mex; www.chupachups.com	Tel: 52 (722) 279-0110; Fax: 52 (722) 279-0111
Danone de Mexico (yoghurts, cheese, etc)	David Hernandez; Purchasing Director	Guillermo Gonzalez Camarena 333; Col Centro Cd. Santa Fe; 01210 Mexico City; www.danone.com	Tel: 52 (55) 5258-7200; Fax: 52 (55) 5292-2593
Dawn Mixco Internacional (baking mixes and raw material dist.)	Manuel Fernandez and Miguel Gonzalez; Purchasing Managers	Carr. Monterrey-Saltito Km 3.7; 66350 Santa Catarina, N.L.; www.dawnfoods.com.mx	Tel: 52 (81) 8388-5088; Fax: 52 (81) 8388-7088
Embotelladoras Arca SA de C.V. (bottling)	Ing. Raul Montemayor Director	Ave. San Jeronimo #813 Pte; Col. San Jeronimo; 64640 Monterrey, N.L.; www.e-arca.com.mx	Tel +52 (81) 8151 1400; Fax +52 (81) 8151 1449
Extractos y Maltas (malt)	Felipe Suberbie Cortina; General Director	Poniente 146 #725; Col. Industrial Vallejo; 02300 Mexico City	Tel: 52 (55) 5567-9022; Fax: 52 (55) 5567-8019
Galdisa (grain, seed, dried fruit, candy and snacks)	Alejandro Hurtado Figueroa; Trade Director	Pico de Verapaz 449-A; Col. Jardines en la Montana; 14210 Mexico City; www.galdisa.com.mx	Tel: 52 (55) 5630-4616; Fax: 52 (55) 5630-4623
Gastronomia Avanzada (baked goods)	Claudia Cobian; Research and Development	Oriente 237 No. 161; Agricola Oriental Mexico D.F.	Tel: 55 5716 7691; Fax: 55 5716 7601
General Mills (imports of food products)	Gustavo Equihua; Operations Director	Ave. Magnocentro 11, Piso 6; Col. Centro Urbano Interlomas; 52760 Huixquilucan, Edo de Mexico; www.generalmills.com	Tel: 52 (55) 5089-0202; Fax: 52 (55) 5089-0244
Gruma SA de C.V.: GIMSA SA de C.V. (corn flour and products)	Ing. Jose Kipper Hinojosa Purchasing Director	Calzada del Valle Ote 407; 62220 San Pedro Garza Garcia, N.L.; www.gruma.com	Tel +52 (81) 8399 3300; Fax +52 (81) 8399 3300
Grupo Bafar SA de C.V. (processed meat)	Ing. Edgar Navarro; Purchasing Director	Km. 7.5 Carretera a Cuauhtemoc; Col. Las Animas; 31450 Chihuahua, Chihuahua; www.bafar.com	Tel +52 (614) 439 0100; Fax +52 (614) 439 0123
Grupo Bimbo: Barcel, Ricolino, Marinela, Pan Bimbo, (baked goods, confection, snacks)	Ing. Jose F. Suarez de la Torre; Purchasing Director	Av. Prolongacion Paseo de la Reforma #1000; Col. Desarrollo Santa Fe; 01210 Mexico City; www.grupobimbo.com	Tel +52 (55) 5268 6600; Fax +52 (55) 5268 6640
Grupo de la Rosa (confection)	Jorge Arturo Orozco; Production Manager	Calle Juarez No. 170; Tlajomulco de Zuniga; 45640 Jalisco	Tel: (33) 379 80850; Fax: (33) 379 80126
Grupo Gamesa (cookies and crackers)	Jose Carlos Rodriguez; International Purchasing Manager; Gilberto Recio; Inputs Purchasing Manager	Lazaro Cardenas #2404 Pte Edificio Los Soles; Col. San Agustin; 66270 San Pedro Garza Garcia, N.L.; www.gamesa.com.mx	Tel +52 (81) 8399 5155; Fax: 8399 5555; Fax +52 (81) 8399 5155
Grupo Herdez (sauces and canned goods)	Adriana Legoretta; Director of Investor Relations	Monte Pelvoux #215; Col. Lomas de Chapultepec; 11850 Mexico City; www.grupoherdez.com.mx	Tel: 52 (55) 5201-5602; Fax: 52 (55) 5201-5646
Grupo Minsa (corn flour products)	Carmen Diaz; Agrarian Business Director	Prol. Toltecas 4; Col. Los Reyes Ixtacala; 54090 Tlalhepanla, Edo. de Mex; www.minsa.com	Tel: 52 (55) 5722-1900; Fax: 52 (55) 5722-1906
Grupo Modelo (beer)	Jose Pares Gutierrez; Director of Investor Relations	Campos Eliseos #400; Col. Lomas de Chapultepec; 11000 Mexico City; www.gmodelo.com.mx	Tel: 52 (55) 5283-3600; Fax: 52 (55) 5283-3600
Grupo Taifeld		Oficinas Generales y Tienda; Martin Mendale 1419; Colonia del Valle; 03100; Mexico City.	Tel: 55 5524-5744; Fax: 5524-0756
Hershey Mexico (chocolate and candy)	Guadalupe Bracho; Materials Manager	Carr. Guadalajara-El Castillo, Km. 8.05; Col. Corredor Industrial; 45681 El Salto, Jal.; www.hersheys.com	Tel: 52 (33) 3678-3232; Fax: 52 (33) 3678-3292
Industrial Aceitera (vegetable oil and lard)	Hector Garcia Padilla; Purchasing Director	Enrique Sada Mugerza 5; Col. Centro Comercial Saltillo; 53100 Naucalpan de Juarez Edo. de Mex.; www.iasa.com.mx	Tel: 52 (55) 5393-8500; Fax: 52 (55) 5562-8127
Jugos del Valle (fruit juice, nectars and drinks)	Lic. Miguel Vargas Lopez; Trade Import-Export Director	Ejercito Nacional 904, Col. Palmas Polanco; 11560 Mexico City; www.jvalle.com.mx	Tel: 52 (55) 5876-2809; Fax: 52 (55) 5876-1086
Kelloggs (cereals)	Jahiro Quiroz; Production-Manufacturing Director	Km 1 Carr. Campo Militar; Col. San Antonio de la Punta; 76200 Queretaro, Qro.; www.kellogg.com.mx	Tel: 52 (442) 211-1300; Fax: 52 (442) 216-3861
Kraft Foods de Mexico	Guillemina Reyes Pichardo; Trade Import-Export Director	Homero 425, Int. 201; Col. Chapultepec Morales; 11570 Mexico City	Tel: 52 (55) 5258-8774; Fax: 52 (55) 5258-8868

Grupo Industrial Lala (dairy)	Ing. Juan Antonio Towns; Purchasing Director	Lazaro Cardenas #185 y Valle Guadiana; Parque Industrial Lagunero; 35070 Gomez Palacio, Dgo; www.grupolala.com	Tel +52 (871) 750 0504; Fax +52 (871) 750 0504
La Madriena (liquor and wine)	Miguel Angel Cortina; Inventory Manager	Arroz 89; Col. Santa Isabel Industrial; 09820 Mexico City	Tel: 52 (55) 5445-1200; Fax: 52 (55) 5445-1270
Nacional de Alimentos y Helados S.A. de C.V. (snacks and ice cream)	Jorge Elizundia; General Manager	San Jeronimo 880 Pte; Col. San Jeronimo; 64640 Monterrey, NL	Tel +52 (81) 8122 2300; Fax +52 (81) 8122 2300
Nestle de Mexico (milk prod., formula, cereal, coffee, drinks, flour mixes, dog food, chocolates)	Dr. Felix Martinez; Trade Import-Export Director	Av. Ejercito Nac. 453; Col. Granada; 11520 Mexico City; www.nestle.com.mx	Tel: 52 (55) 5262-5000; Fax: 52 (55) 5250-7965
Nutrisa (all-natural foods and frozen yoghurts)	Sofia de Hoyos Correa; Nutrition Coordinator	Periferico Sur 5482; Col. Pedregal de Carrasco; 04700 Mexico City; www.nutrisa.com.mx	Tel: 52 (55) 5424-6600; Fax: 52 (55) 5424-6600
Productos Rich (Industrial baked goods)	Alberto Roca; Research and Development Manager	km 0.5 Carretera Amomulco-Santiago Tianguistenco; Ocoyoacac; Toluca Edo. De Mexi.	Tel: 52 (55) 5387 3678; Fax: 52 (55) 555387 3678
Pepsi-Cola de Mexico (prod of concentrates for bottled soft drinks)	Hugo Gomez; Tools Trade Vice President	Av. Vasco de Quiroga 3000, Piso 4; Col. Santa Fe; 01210 Mexico City; www.pepsi.com.mx	Tel: 52 (55) 5261-4500; 52 (55) 5261-4599
Pilgrims Pride (prod. and dist of poultry products)	David Goldstein Weitzman; Consultant	Oklahoma 112; Col Napoles; 03810 Mexico City	Tel: 52 (55) 5448-8300; 52 (55) 5448-8386
Procter and Gamble	Jose Luis Oviedo; Trade-Import-Export Director	Loma Florida 32; Col. Lomas de Chapultepec; 05100 Mexico City; www.pg.com.mx	Tel: 52 (55) 5724-2000; Fax: 52 (55) 5724-2254
Productos del Monte (canned foods, sauces, etc)	Alejandro Geis; Production-Manufacturing Director	Av. Colonia Del Valle 615; Piso 3; 03100 Mexico City; www.delmonte.com	Tel: 52 (55) 5536-3040; Fax: 52 (55) 5687-5975
Productos Gerber (baby food)	Moises Acosta; Trade Import-Export Director	Av. Epigmenio Gonzalez 59; Col. Industrial; 76150 Queretario, Qro.	Tel: 52 (442) 211-8300; Fax: 52 (442) 217-9384
Qualtia Alimentos Procesados (meat)	Francisco Burgos; Purchasing Director	Ave. Condutores #600; Col. La Grande; San Nicolas de los Garza, NL; www.qualtia.com	Tel +52 (81) 8030 3000; Fax +52 (81) 8030 3000
Sabritass (snacks)	Jorge A. Meyer Franco; Logistics-Warehouse Director	Av. de las Palmas 735; Col. Lomas de Chapultepec; 11000 Mexico City; www.sabritas.com.mx	Tel: 52 (55) 5227-7400; Fax: 52 (55) 5227-5619