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Mexico

Retail Food Sector

Mexico's Retail Food Sector

2005

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Report Highlights:

Supermarkets and department stores continue to provide US exporters with the best points-of-sale. Convenience stores are potentially excellent venues for US product, though most chains sell relatively few imported goods. Traditional retail stores serve a large number of Mexican consumers but offer less potential for selling imported products. Similarly, outdoor markets (tianguis) sell few import products, except for nuts and deciduous fruits.

Includes PSD Changes: No

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Section I. Market Summary

There are approximately 5,729 retail stores in Mexico selling food and beverages, a figure that includes outlets for major retail chains and government and convenience stores, but excludes small family stores. The retail market posted a seven percent increase in sales from 2002 to 2003. In the same period the net sales growth for the four leading retailers was as follows: Wal-Mart, 9 percent; Comercial Mexicana, 4.9 percent; Gigante, 3.2 percent, and Soriana, 7 percent.

Formal retail space expanded by 8.9 percent in 2003, following a 5.4 percent increase in 2002. The top four retailers invested approximately \$847 million in 2003 to establish new outlets and increase floor space. Soriana planned to spend roughly \$223 million in 2004, increasing to \$300 million in 2005. Wal-Mart expects to invest \$625 million over the next 18 months to open 77 new outlets. Comercial Mexicana will also invest \$181 million during the same period, increasing their retail space by ten percent.

The major retailers are developing increasingly sophisticated distribution systems. Comercial Mexicana opened a facility north of Mexico City that is handling approximately 80 percent of its dry goods. Wal-Mart launched its newest distribution center in Monterrey in July 2003 and inaugurated a 2.1 million square foot facility for fresh and frozen goods in late Fall 2004. Texas-based HEB developed a 300,000-square-foot distribution center just north of Monterrey for both perishable and dry goods. Despite advances in logistics, retail stores still depend heavily on local distributors, especially for frozen food and perishables.

Table. 1. Advantages/Challenges for U.S. Exporters Targeting Mexico's Retail Sector

Advantages	Challenges
Retail stores are modernizing and adding more freezer space to accommodate frozen foods.	Mexican industry offering more frozen products competing with imports.
Belief among Mexican consumers that U.S. products such as red meat, pork, dairy, poultry and other products are of high quality.	Commercial barriers such as labeling, phytosanitary regulations, and NOMs (Mexican quality standards) continue to pose obstacles for importing some U.S. products.
Major retailers are adopting modern, centralized distribution systems that should help U.S. suppliers compete with the powerful delivery systems of Mexican producers.	As Mexico's transportation and distribution infrastructure improves, other countries will be able to deliver product more efficiently to the Mexican market.
Rising per capita income, more women in the workforce, and increasing foreign investment are driving the demand for imported foods.	The traditional "mom & pop" stores and street markets make up a large part of Mexico's retail sector, but offer limited market potential for U.S. exporters.
Because of NAFTA, U.S. products have preferential import duties compared to products from many third countries. As of 2003, most U.S. food and agricultural product exports to Mexico are duty-free.	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.
Mexico's domestic production of milk powder, poultry, red meat, canned fruits, sugar, cereals and pet food cannot meet domestic demand (Source: Bancomext).	U.S. firms must aggressively solicit new business and establish in-country sales and servicing infrastructure.
Geographic proximity to Mexico gives U.S. exporters a competitive advantage over third	Imported products are relatively more expensive and take longer to arrive in the

country suppliers.	marketplace
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SECTION II. ROAD MAP FOR MARKET ENTRY

A. Megamarkets, Hypermarkets, Supermarkets, Club and Warehouse Stores

Entry Strategy

The best way to simultaneously find a distributor and determine the viability of your product in the market is to visit Mexico and meet with prospective representatives. These distributors are constantly visiting customers and introducing new products; if anyone knows whether a given food item has possibilities, it is the distributors. Exporters should also participate in and/or attend Mexican trade shows not only as a way to contact local distributors/sales agents, buyers and businessmen, but also to gain familiarity with the local competition and market trends. The Agricultural Trade Offices (ATO) in Mexico City and Monterrey organize participation in Mexican trade shows and can assist in contacting distributors and arranging interviews in Mexico.

Once a distributor is established, the U.S. supplier needs to nurture the relationship. Good communication between the supplier, distributor and end-user was cited often by interviewees as one of the most important components to building a successful distribution network in Mexico. U.S. suppliers should closely monitor their distributors' activities by traveling to the market, going on customer calls and supporting distributor promotional activities.

It is possible to bypass a Mexican distributor and to sell directly to retail stores. As discussed below, the major retailers are establishing their own distribution centers and currently import product directly from the United States. But unless the volume is significant, a U.S. supplier will still depend on a local representative. Also, the exporter would need a local distributor to service the remaining retailers that do not import directly.

If introducing a new product, be prepared to provide support and pay for in-store and media promotions to create consumer awareness. If possible, develop product information/promotional pamphlets in Spanish. Food and beverages packaged for retail consumption in Mexico must be labeled according to NOM regulations (Mexican Official Norms). Incorrect metric system designations, imprecise punctuation, or the wrong font size can be enough to have a label and its accompanying product rejected at the border.

The availability of private labels depends on the category. Comercial Mexicana reported that ten percent of its dry goods carried private labels and made up roughly four percent of its sales of non-perishables. Both Carrefour and HEB import their own private labels, the former from France and South America and the latter from the United States. A Mexico City distributor of imported brand name pretzels also sells the same product as a private label. The distributor reported that he sells six times as much of the brand-name pretzel than the generic version – suggesting that Mexicans may be more brand-loyal than price sensitive. He also commented that the brand-name pretzel had a 30 percent margin while the private label had a 10 percent margin.

Roughly 10 percent of top retailers' stock is imported. In specific categories this number can be much lower. Comercial Mexicana reported that 7.7 percent of its goods are imported, while Soriana reported 8.4 percent, Wal-Mart 6.4 percent and Gigante 5.8 percent, respectively.

Market Structure

Store Formats. Mexico's large retailers are similar in size and structure to those in the United States. The following table summarizes the formats.

Table 2. Retail Store Formats

Format	Sq. Feet	Description	Store Names
Megamarket	More than 100,000	Full line of merchandise and additional services such as a pharmacy.	Wal-Mart Super Center, Casa Ley, Soriana Comercial Mexicana, Carrefour, Chedraui
Hypermarket	45,000 - 100,000	Almost a full line of merchandise and additional services.	Wal-Mart, Aurrera, Gigante, Casa Ley, HEB Comercial Mexicana, Comercial V.H., Soriana Carrefour, Chedraui, San Francisco de Asis,
Supermarket	5000 – 45,000	Food items (perishables and dry goods) and limited services, including a pharmacy.	Superama, Sumesa, Casa Ley, Super G Central Detallista Comercial Mexicana Comercial VH Chedraui San Francisco de Asis HEB
Warehouse	over 25,000	No-frills with wholesale discounts. Full line of merchandise.	Bodega Aurrera, Bodega Gigante, Bodega Comercial Mexicana
Convenience Stores	less than 5000	Limited selection of convenience items sold 24 hours.	OXXO, 7-Eleven, Matador, Comextra, Circle K, Duxy; AM PM, Superette Del Rio, Super's Rapidito Bip Bip
Club Stores	greater than 45,000	Full line of merchandise targeted to other wholesalers and semi-wholesalers, business owners and large families.	Sam's Club, City Club, Costco, Pricesmart
Department Stores	Over 25,000	Full line of luxury goods, similar to a Macy's. Also has gourmet food section.	Palacio de Hierro; Liverpool

Source: ANTAD

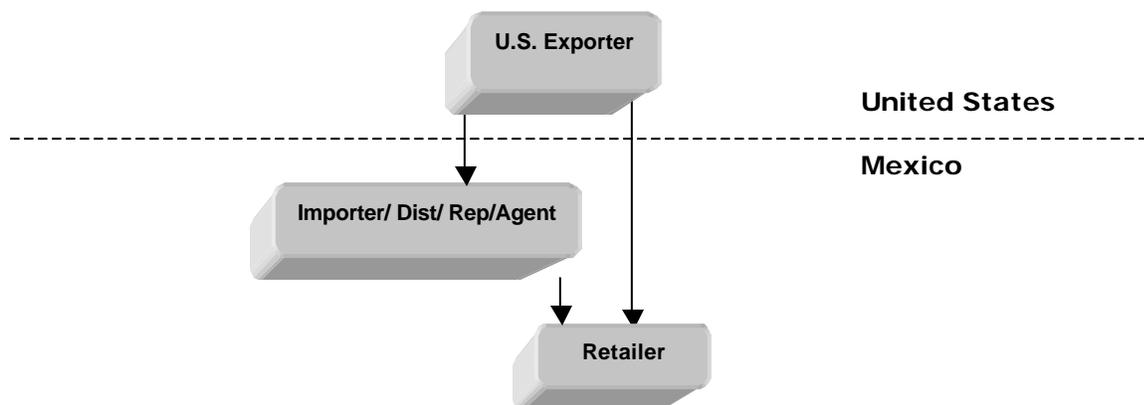
Consumers from all socioeconomic levels shop at stores in these categories, although primarily those from the middle and upper-income groups. The exceptions are the "Club" formats, which require members to pay a yearly fee, effectively excluding lower income consumers. These consumers more commonly shop in the "bodega" or warehouse stores that offer bulk items in a no-frills environment.

It is important to note that Club stores in Mexico have become important sources of supply for small businesses and hotels and restaurants. It is very common for restaurant owners and distributors to buy U.S. meat, fresh fruits and other products in bulk at Costco and Sam's Club. These stores are effectively competing with the *Central de Abastos* (the traditional wholesale market) as a "wholesaler."

More stores are offering ready-to-eat foods, although these are limited. Superama, for example, prepares Japanese "California rolls" and sells whole roasted chickens. Wal-Mart and Carrefour serve prepared Mexican dishes that customers pack themselves into styrofoam

containers for immediate consumption at home. Many retailers have their own in-store bakeries.

Distribution. U.S. exporters normally ship their product to distributors that import, stock and deliver to the retailer's distribution center or individual stores. Wal-Mart, Gigante, Soriana, Comercial Mexicana, Carrefour and HEB are all capable of direct purchasing and may deal directly with foreign suppliers. Even the largest retailers depend heavily on local distributors for imported product, however.



Soriana, Gigante and Comercial Mexicana recently received the authorization of the Mexican Anti-Trust Commission to create Sinergia, which will cooperate in purchasing and distribution to reduce costs and compete with the market leader, Wal-Mart. Combined, these chains sell less than the U.S.-owned giant, which controls 54 percent of the market. It is not yet known when and how this new cooperative purchasing mechanism will affect suppliers.

Table 3. Major Retailers

Retailer Name and Outlet Type	Ownership	Sales US\$ Millions	Number of Outlets	Locations City/Region	Purchasing Agent Type
Wal-Mart de México, SA de CV Supercenters (89), Supermarkets (48), Clubs (61), Warehouses (162)	Wal-Mart, 62.4%	12,547	360	All major cities	Direct, local distributors; importers
Grupo Gigante, SA de CV Hypermarkets (61), Supermarkets (100), Clubs (3, closing 2/05), Warehouses (52), Gigante USA (8)	Local	2,736	224	All major cities and California	Direct, local distributors; importers
Controladora Comercial Mexicana, SA de CV Hypermarkets (66), Megamarket (36), Warehouses (32), Supermarkets (18), Club (CostCo)(24)	Local	3,121	176	Mexico City and Central Mexico	Direct, local distributors; importers

Organización Soriana, SA de CV Hypermarkets (135), Supermarkets (23), Clubs (13)	Local	3,194	171	All major cities (except Mexico DF and State of Mex.)	Direct, local distributors; importers
Grupo Comercial Chedraui, SA de CV Hypermarkets (61), Warehouse (6), Supermarkets USA (5), convenience (9)	Local	1,001*	81	Major cities in Southern and Central México, and California	Direct and local distributors
Grandes Superficies de México, SA de CV "Carrefour" Hypermarkets (27)	French owned	810*	27	All major cities	Direct, local distributors; importers
Supermercados Internacionales HEB, SA de CV Hypermarkets (8), Supermarkets (12)	US owned	N/A	20	Northern Mexico	Direct, local distributors
Central Detallista, SA de CV "Calimax" Supermarkets (44)	Local	N/A	44	North Western Mexico (Baja Cal. and Sonora)	Direct, distributors
Casa Ley Hypermarkets (52), Megamarkets (8), Supermarkets (49)	Safeway 49%	N/A	109	Western Mexico	Local distributors
Comercial VH Hypermarkets (25), Convenience (21)	Local	N/A	46	Northern Mexico	Direct, local distributors
Super San Francisco de Asis, SA de CV Hypermarkets (2), Supermarkets (33)	Local	N/A	35	Southern Mexico	Direct, and local distributors

Source: Expansion, ANTAD, company annual reports, and telephone interviews.

*Figures from 2002.

The top retail food chains are increasingly supplying their stores via centralized distribution centers (DCs). In this respect, Wal-Mart is well ahead of the competition in terms of percentage of goods that are delivered to stores in Wal-Mart vehicles. Most frozen food distributors report that they still deliver directly to stores, while dry goods suppliers claim that they are making far more deliveries to DCs. Suppliers report paying a 2.5 to eight percent fee to the retailers for shipments delivered to the DCs, an amount that they believe is justified since they no longer have to deliver to each store.

Comercial Mexicana opened a facility north of Mexico City in 2003 that is handling approximately 80 percent of its dry goods. Wal-Mart launched its distribution center in Monterrey in July 2003 and plans to inaugurate a 2.4 million square foot facility for frozen goods in 2004. Wal-Mart DCs offer state-of-the-art logistics technology featuring a system called "retail link" that informs suppliers on how their product is selling and when re-stocking is required. Texas-based HEB develop a 300,000-square-foot DC just north of Monterrey for both perishable and dry goods.

B. Convenience Stores, Gas Marts, Kiosks

Entry Strategy

The entry strategy for supplying these store formats is essentially identical to supplying the large retail stores: U.S. suppliers will most likely need to work through a local distributor. It is also important to note that convenience stores in Mexico offer a limited number of products, and brand selection is equally small. Thus, frozen foods, gourmet items, wines, and other up-scale products will have limited prospects.

Demand for competitively priced imported products at convenience stores, gas marts and kiosks is growing moderately. Typical imported products include: snacks, candies, pet food, cookies, alcoholic beverages, beer, prepared dinners and cake mixes. Portion control products are gaining popularity, and sales of high-energy soft drinks are brisk.

Market Structure

Convenience stores are those selling a limited number of convenience items 24 hours a day. Retail space is less than 1700 square feet, but OXXO's average store is only 1200 square feet. Although the stores appear similar to their U.S. counterparts, a closer inspection reveals that the product selection is less extensive. The refrigerated section offers a limited number of soft drinks, juices, yogurts, cheese and sandwiches. The frozen section is usually one small freezer with only ice cream bars. They typically also offer hot dogs, sandwiches and microwaveable products.

Convenience stores are located in major and medium-sized cities, usually in middle and upper class neighborhoods. In general, convenience stores normally source their products with agents/distributors, although some chains such as 7-Eleven have purchased directly from the exporter.

OXXO is the leading chain in the industry with approximately 3,000 stores. The company also operates 584 outlets under the name "Matador" which are smaller in size and carry lower priced products. 7-Eleven has more than 500 stores in all major cities and Comextra (Extra) has 484.

Convenience stores are the fastest-growing store format in Mexico. OXXO has tripled its number of outlets in just five years. 7-Eleven doubled the number of stores in the same time period. This growth may be coming at the expense of the "traditional" stores: according to Mexico's Small Business Chamber of Commerce (Canacope), for every convenience store that opens, five "Mom & Pop" shops close.

It is interesting to note that OXXO is owned by Grupo Femsas (the holding company for Coca-Cola and Cerverceria Cuauhtemoc) and Comextra/Extra is owned by Grupo Modelo. OXXO does not sell products competitive to the brands of the parent company (i.e. does not stock Pepsi or Corona beer). Similarly, Extra does not sell Cuauhtemoc beer (such as Sol and Dos Equis) but does sell imported beers from Anheuser-Busch, a major investor in Modelo.

Purchasing decisions at OXXO are generally made at the national level and three-quarters of the products are delivered directly to the stores by OXXO or FEMSA subsidiary vehicles. Products with longer shelf lives are distributed to stores via five regional OXXO warehouses located throughout the country.

"Kiosks" can be found on highways (usually near tollbooths) and other high traffic areas. One chain, Duxy, has 51 locations nationwide. These outlets can vary from permanent small stores to mobile trucks. Kiosks offer soft drinks, hot beverages, snacks and confectionery products.

Pemex, the state-owned oil company, now allows private operation of its service stations. Virtually all of Mexico's 6,659 Pemex service stations are privately owned and operated as franchises. Many of these have chosen to install convenience stores on the premises. OXXO is one of the leaders in number of stores. Hydrosina, one of the largest franchise operators, has an agreement with Extra for developing new stores at Pemex stations.

Table 4. Major Convenience Store Chains

Retailer Name and Outlet Type	Ownership	2002 Sales US\$ Millions	Number of Outlets	Locations City/Region	Purchasing Agent Type
Cadena Comercial OXXO, SA de CV	Subsidiary of FEMSA/Cerveceria Cuauhtémoc	NA	3,000	Major cities and regions	Direct Purchase and local distributors
Matador	Part of OXXO	NA	584*	Major cities	Direct Purchase and local distributors
7-Eleven México, SA de CV	Joint venture with local ownership	NA	500	Major cities	Direct purchase and local distributors
Comextra (Extra)	Subsidiary of Grupo Modelo	NA	484	Major cities	Direct purchase and local distributors
Circle K	Local ownership	NA	50	Major cities	Direct purchase and local distributors
Duxy	Local ownership	NA	51	Major toll highways	Direct purchase and local distributors
Comercial Nortena (Super's Rapidito Bip Bip)	Local ownership	NA	73	Cd. Juárez	Direct purchase and local distributors
Almacenes Distribuidores de la Frontera (Superettes; Del Rio)	Local ownership	NA	125	Chihuahua	Direct purchase and local distributors
AM PM	NA	NA	34	Baja California and México City	Direct purchase and local distributors

Source: ANTAD, annual reports, and telephone interviews.

*2002 figure

C. Traditional Markets -- Small Independent Grocery Stores, "Mom & Pop" Shops, Wet Markets and High-End Specialty Stores

Entry Strategy

Given the fact that most products are supplied out of central markets or Club stores, U.S. exporters should contact local large wholesalers and *Centrales de Abastos*, which deliver or serve these stores. Given the limited number of products sold in this format, only inexpensive, non-perishable dry goods are appropriate. The exception is deciduous fruit).

Distributing to high-end specialty stores is similar to selling to other major retailers. This will almost certainly be accomplished through a local distributor.

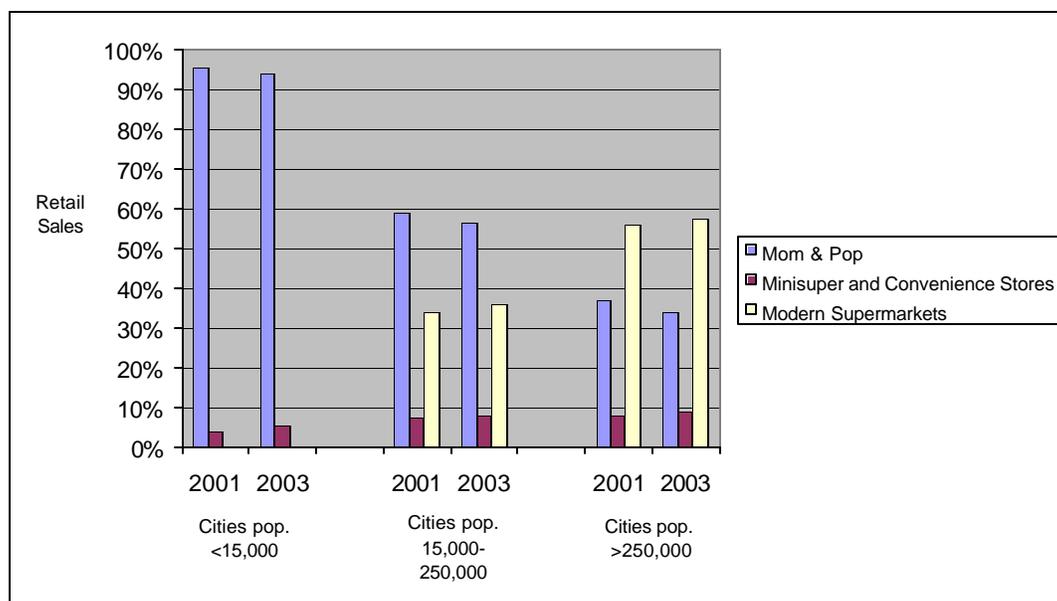
Market Structure

There are four types of retail channels in this category.

1. The independent “small grocer” that has a cash register and checkout counter, and up to ten stores operated by the same owner.
2. The small grocery store (“tienda de abarrotes”) that sells a line of dry goods, canned goods or non-food items plus some perishable items.
3. The wet market, which is an informal open air and/or roofed market.
4. High-end specialty stores that carry mostly imported products.

Morgan Stanley estimates that just over half of food and general merchandise spending occurs in formal retail channels. A Mexican rice company, for example, estimates that only 30-35 percent of its products are sold in the modern retail channel. The following table details sales through different channels.

Table 5. Retail Sales by Outlet by Population Center



Source: AC Nielsen 2004. Note: there are no modern supermarkets in small towns.

Thus, the small, family-owned stores and markets are important sales points for food products. Unfortunately, because they cater to mostly low-income customers and quick convenience purchases, the prospects for selling higher value-added products through these channels are highly limited.

Sub-Sector Profile

Small grocery stores or mini-supers are usually found in smaller urban centers throughout the country and/or in residential neighborhoods. They are visited on a regular schedule by wholesalers or the large food and beverage processors with staples such as bread, dairy products and snack foods. Candy, alcoholic beverages, dry goods and fruits and vegetables are also sourced directly at hyper-markets such as Wal-Mart, Club stores like Sam's Club, and *Centrales de Abastos* (giant food distribution markets found in every city).

The smallest stores, Mom & Pops or "tiendas de abarrotes" (supply stores), are located on practically every block in Mexico's cities and towns. Their clients are commonly neighborhood residents, who tend to make smaller purchases and have access to short term credit. It is estimated that there are approximately 400,000 stores of this type across the country. A store may measure as little as 100 square feet and carry a limited variety of products and a small inventory. Refrigeration space is limited.

"Wet markets" are either fixed or roving markets that mainly offer fresh fruits, vegetables and meats. These markets are not a sales point for imported processed foods, but other imported food products, such as rice and apples, are sold through this channel.

There are a few small chains of specialty stores or independent operators that deal in fine foods and alcoholic beverages. These import directly and also use the services of domestic distributors. Located primarily in the Mexico's three largest cities, these stores cater to the high end of the food and beverage market. In addition to offering retail sales, these stores also distribute directly to bars and restaurants. The oldest and most prestigious of these high-end specialty stores is La Europea, which has 26 stores in several cities including Mexico City, Guadalajara, Queretaro and San Miguel de Allende. In addition to an extensive list of wines and spirits, La Europea also carries a broad selection of imported canned seafood, pastas, preserves and specialty foods. A source at this company noted that most of its foreign suppliers are European or Chilean.

Table 6. High-End Specialty Stores

Retailer Name and Outlet Type	Ownership	Number of Outlets	Locations City/Region	Purchasing Agent Type
Vinos, Licores Naucalpan, SA de CV ("La Divina")	Local	128	Major cities	Importer and local distributor
La Europea México, SA de CV ("La Europea")	Local	26	Major cities	Import through subsidiary: Importaciones Colombres, SA de CV
Vinoteca México, SA de CV.	Local	13	Monterrey and major cities	Importer and local distributor
La Castellana	Local	7	Mexico City and Monterrey	Importer and local distributor

SECTION III. COMPETITION

Competition in supplying products to the retail sector

Local producers are the main suppliers of consumer ready products. Mexico has a relatively strong food processing industry and leading Mexican brands have well-developed national distribution networks, are well-positioned in the market and enjoy high brand awareness with consumers. Some of these companies include Grupo Industrial Bimbo (bread products) considered to have one of the country's best distribution systems, Nestle (food products in general), Herdez (food products in general), Sabritas (snack foods) Grupo Industrial Lala (dairy products) and Jugos del Valle (canned fruit juices).

There are also several American and multinational producers/importers in Mexico, including: Campbell's, Bacardi, General Mills, Gerber, Kellogg's, Kraft Foods, Procter & Gamble, Frito Lay-Pepsico, Pilgrim's Pride, Purina, and Tyson.

Competition among importers depends on the category. Competition from Europe has increased as a result of the Mexico-European Union Free Trade Agreement, although meat and dairy products were excluded from the treaty. Canada, Australia and New Zealand export notable amounts of meat and dairy products to Mexico. New Zealand butter, for instance, is well-positioned in Mexico City retailers.

The major retailers are developing increasingly sophisticated distribution systems. Comercial Mexicana opened a facility north of Mexico City that is handling approximately 80 percent of its dry goods. Wal-Mart launched its newest distribution center in Monterrey in July 2003 and plans to inaugurate a 2.1 million square foot facility for frozen goods in 2004. Texas-based HEB developed a 300,000-square-foot distribution center just north of Monterrey for both perishable and dry goods. Despite advances in logistics, retail stores still depend heavily on local distributors, especially for frozen food and perishables. When delivering to a distribution center, distributors pay a fee of 2.5 to eight percent to retailers.

Supermarkets and department stores continue to provide U.S. exporters with the best points-of-sale. Convenience stores are potentially excellent venues for U.S. product, though most chains sell relatively few imported goods. Traditional retail stores (Mom & Pop stores) serve a large number of Mexican consumers but offer little potential for selling imported product.

Following is a summary of the main foreign competitors in their respective categories:

- **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%).
- **Confection.** Top suppliers of sugar imports: United States (63%), Brazil (11%), Guatemala and Colombia (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.
- **Beverages.** Top suppliers of imports: United States (41%), Spain (16%), France (9%).
- **Fruits, vegetables and grains.** Almost all of the yellow corn consumed in Mexico originates from the United States while white corn is nearly entirely domestic. Corn importers must obtain a permit to buy yellow corn. Top suppliers of cereals imports: United States (91%), Canada (8%). For imports of vegetables and fruits the suppliers are United States, Canada and Chile, with the following shares of the import market: Vegetables: United States (78%), Canada (10%) and Chile (6%). Fruits: United States (69%), Chile (24%) and Canada (2%).
- **Pet Food.** Top suppliers of imports: United States (87%), France (4%).

SECTION IV. BEST PRODUCT PROSPECTS**A. Products Present in the Market Which have Good Sales Potential**

Apples	Bread, pastry, cake, biscuits, etc.
Canned corn	Candies
Cheese and curds	Chocolate and preparations containing chocolate
Fresh and frozen meat cuts of beef and pork	Fresh and fruit juices and concentrates
Fresh vegetables in dinner presentations	Frozen chicken parts
Frozen dinners	Frozen french fries
Frozen turkey parts	Further processed dark meat poultry products (precooked and fully cooked)
Frozen desserts	Frozen pastries and breakfast products
Fruits, nuts and edible plant preparations	Frozen vegetables
Ice cream	Jumbo frankfurters
Jams	Kosher food
Mesquite smoked turkey breasts	Pears
Pork	Prepared foods from cereal
Pizzas	Raw dark meat cuts of poultry and turkey
Salad dressings	Sauces and preparations
Seafood	Smoked sausage
Smoked turkey	Snacks, corn chips, potato chips
Soups, broths and other similar preparations	

B. Products Not Present in Significant Quantities but Which Have Good Sales Potential

Mixed nut assortments, beer nuts	Peanuts with and without shell
Peanut butter	Popcorn
Specialty beer	Cranberries
Apricots	Blueberries
Cherries	Dehydrated vegetables

SECTION V. POST CONTACTS AND FURTHER INFORMATION

The primary mission of the U.S. Agricultural Trade Office (ATO) in Mexico City 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," make available to help develop U.S. agricultural interests in Mexico.

If you have any questions or comments regarding this report or need assistance exporting processed food products to Mexico, please contact the U.S. Agricultural Trade Office in Mexico City at the following address:

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