



USDA Foreign Agricultural Service

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**Mexico**

**Exporter Guide**

**Annual**

**2005**

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**Report Highlights:**

The hotel, restaurant and tourism, food processing and retail sectors in Mexico all present good opportunities for US agricultural exports. In 2004, exports of agricultural, fish and forestry products to Mexico reached a record nine billion dollars, while imports of same products from Mexico also achieved a record eight billion dollars. For the first eight months of 2005, both exports and imports were ahead of the record 2004 figures, at 6.4 billion dollars and 6.1 billion dollars, respectively.<sup>1</sup>

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

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<sup>1</sup> U.S. Department of Commerce, Bureau of the Census

## Section I: Market Overview

In 2004, the Mexican economy grew at a 4 percent rate (4.4 percent according to the Government of Mexico), the strongest growth in many years. Growth in 2005 will slow somewhat, but is still expected to be around 3.5 percent. Petroleum and remissions from Mexicans in the US are the largest foreign exchange earners, followed by tourism and direct foreign investment.

Under NAFTA, Mexico has become one of the largest and fastest growing markets for US agricultural products. NAFTA was fully implemented in 2003 (except for corn, dry beans and some dairy products) resulting in duty free entry for most US agricultural products. US agricultural fish and forestry exports have more than doubled since the onset of NAFTA (from \$4.1 billion in 1993). In addition, Mexico rebounded from the financial crises of the mid-nineties, and the banking and fiscal reforms have made for a more robust and stable economy. With the additional political reform reflected in the election of a president from a new political party for the first time in 70 years in 2000, Mexico has proven itself to be a modern stable democracy. The next presidential election will occur in July 2006. The three main political parties selected their presidential candidates in November 2005.

Mexico is the United States' second most important trading partner after Canada. Total trade with Mexico in 2004 was 266.6 billion dollars. Mexico continued its overall trade surplus with the United States with total U.S. to Mexico sales equaling 110.8 billion dollars, while total Mexico to U.S. sales reached 155.8 billion dollars. However, as in past years, the United States enjoys a trade surplus in exports of agricultural, fish and forestry products to Mexico. In 2004, these exports reached a record nine billion dollars, while imports of same products from Mexico also achieved a record eight billion dollars. For the first eight months of 2005, both exports and imports were ahead of the record 2004 figures, at 6.4 billion dollars and 6.1 billion dollars, respectively.<sup>2</sup>

In 2003, The United States had a 75 percent import market share in agricultural products, followed by Canada with 6 percent. The market share has dropped slightly from 77 percent in 1998 as Mexico has aggressively initiated trade agreements with other countries and regions. Mexico has negotiated free trade agreements with 32 countries on three continents and is currently negotiating agreements with at least five countries. Mexico is heavily reliant on the U.S. market with 89% of total exports and 86% of agricultural exports going there.

Demographic changes in Mexico bode well for increasing exports. Women continue to join the workforce in larger numbers, which leads to increased demand for consumer-ready food products. In 1990, approximately 30 percent of women were employed; in 1997, this increased to 39.4 percent, and the most recently reported figure in 2000, indicates that 44.6 percent of women from the ages of 15-64 are working outside the home. This figure is generally higher in the eight cities with populations of over 1 million. As more women work away from home, buying patterns are shifting towards fast, easily prepared meals. In addition, 53 percent of Mexico's population is under the age of 25. These up and coming consumers are more oriented towards US products, further accelerating the ever increasing demand for US food products in the market.

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<sup>2</sup> U.S. Department of Commerce, Bureau of the Census

Economic and political stability, the full implementation of NAFTA, increasing per capita income, and lack of arable land make Mexico an excellent long-term prospect for US agricultural products.

Highlight for sales of US Agricultural Fish and Forestry Products to Mexico based on figures from January to August 2005:

- After a dip in 2004 due to the BSE incident in late 2003 and subsequent 10-week market closure, exports of red meat have rebounded and regained momentum, soaring to \$838 million, 45 percent higher than the same time in 2004. This acceleration will increase when the market reopens for bone-in beef.
- Similarly, poultry meat and dairy product exports are 44 and 43 percent higher, respectively, than the same time in 2004. It is likely that new export records will be set for both before year's end.
- Bulk exports are down seven percent by value, mainly due to lower commodity prices, as export volume is up.
- The soybean complex – soybeans, soybean meal and soybean oil – continue their strong growth, with export values rising 7, 27 and 72 percent, respectively, for the period.
- Finally, forest product exports are up a healthy 11 percent to \$333 million.

## Advantages and Challenges for US Exporters in Mexico

Advantages	Challenges
<ul style="list-style-type: none"> <li>◆ The majority of US products now enter Mexico tariff-free</li> <li>◆ Mexican consumers recognize US brands and labels and associate US made products with high quality and value</li> <li>◆ The US has strong reputation for consistency in the quality and supply of US products among retail chains</li> <li>◆ Population in urban centers is growing and the rate of employment among women is continuing to grow</li> <li>◆ Proximity to US market keeps transportation costs to Mexico low</li> <li>◆ The Mexican peso continues to be relatively stable in its relation to the US dollar, making unexpected price fluctuations less likely</li> <li>◆ Continued growth in almost all sectors of the processed food industry in Mexico, and increased investments from national and international based companies, including from the US, will raise the need for inputs</li> <li>◆ The major retailers are developing increasingly sophisticated distribution systems, which will provide more space and better cold chain technology for high-value imports</li> </ul>	<ul style="list-style-type: none"> <li>◆ Mexico continues to explore and use individual product by product policy measures on a few sensitive products to protect the domestic industry, such as considering safeguard and anti-dumping cases</li> <li>◆ Increasing competition from Mexican food processing companies</li> <li>◆ Mexican consumers are very price conscious, and imported US processed products in general are 15-40 percent higher in price</li> <li>◆ Transportation and distribution methods inside Mexico are undeveloped in many regions</li> <li>◆ Imported products are subject to often onerous Mexican quality standards (NOMs) and labeling requirements</li> <li>◆ Phytosanitary and technical barriers and labeling requirements can cause border crossing problems and delays as Mexican import regulations can change rapidly and without notice</li> <li>◆ Mexico has signed 10 trade agreements in the last decade covering 60 percent of the world's GDP, including Europe; thus increasing third country competition</li> </ul>

## Section II. Exporter Business Tips

### Business culture

Personal relationships are the primary base of Mexican business relationships. Mexicans attach great importance to courtesy in all business endeavors. Many will not want to do business, regardless of the viability of the project, with someone who does not practice general courtesy or is considered rude or disrespectful. A warm handshake combined with conversation about the person's well being, family, or other similar topics prior to launching into any conversation related

to business is considered a common courtesy. The concept that “time is money” should be left at the border, and though Mexican businesses are also conscious of the bottom line, courtesy and diplomacy are more important values to most Mexicans than getting immediately “down to business”. In the face of a disagreement, Mexicans tend to be skilled at diplomacy and choose to avoid confrontation and loss of face. In a potential confrontation they strive to reach a consensus without having clearly defined winners and losers. These skills of diplomacy are important when approaching all forms of business in Mexico.

Personally visit your Mexican clients in Mexico. If a Mexican client visits you in the United States, you are expected to wine and dine him. You will be accorded similar treatment when visiting Mexico.<sup>3</sup>

### Entering the Mexican Market

The best way to understand the Mexican market is to visit the marketplace and to talk to buyers, retailers, distributors and other players in order to prepare a more effective entry strategy. US exporters must do their research not only in terms of typical market research, but also finding appropriate business contacts and thoroughly reviewing Mexican import regulations in order to successfully seize market opportunities and overcome market challenges.

US exporters should consider contacting local distributors/importers as an important early step in their efforts to establish themselves in the Mexican market. A good distributor should promote sales and make sure that the imported products are available at points of sale. It is essential to maintain close contact with your representative, especially regarding changes in import procedures and documentation.

An affordable way to investigate the market is to participate in and/or attend Mexican trade shows, particularly US Pavilions organized at selected shows. A show can serve as a way to contact local distributors/sales agents, buyers and businessmen, and to become familiarized with local competition. In the case of new-to-market companies, be prepared to provide support for in-store and media promotions to familiarize consumers with your products. If possible, develop product information/promotional pamphlets in Spanish.

More information is available on import regulations in the GAINS report MX5064 that includes information on the processes and procedures for exporting products across the US-Mexican border. Furthermore, the US Agricultural Trade Offices (ATO) of the US Embassy with offices in Mexico City and Monterrey can provide general market and sector specific information, as well as assist US exporters in identifying trade contacts and developing their marketing strategies in Mexico.

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<sup>3</sup> The reference for this section is a book by Eva Kras, Management in Two Cultures, Intercultural Press, Inc, 1995, which provides an excellent comparison of the business cultures in the US and Mexico.

### Section III. Market Sector Structure and Trends

#### A. Retail Sector

The retail sector continues its incredible growth. Wal-Mart Mexico, the country's largest retailer, (<http://www.walmartmexico.com.mx/>) had sales growth of almost 14% for the first 30 weeks of 2005 and is projecting medium term sales growth of 15%. Also, Wal-Mart added 16 new stores this year through early August, including 1 Superama, 2 Sam's Clubs, 3 Wal-Mart Supercenters, and 10 Bodegas Aurrera, bringing its total to 426 stores. Soriana (<http://www1.soriana.com/>) grew sales just over 13% for the second quarter of the 2005 and is projecting 14% growth for the year. Through July Soriana opened 14 stores, 9 Mercados, 4 City Clubs and 1 Soriana, bringing its total to 175 stores. In addition, Soriana has 25 stores under construction. In 2005, Soriana is entering the ferociously competitive Mexico City market. Comercial Mexicana (<http://www.comerci.com.mx>) has 180 stores, adding 5 stores through June 2005 while closing 4. Its plans are to build another 12 stores this year. Finally, Chedraui, up until June a regional chain in southeast Mexico, purchased Carrefour's stores and converted a number of them to Chedraui supermarkets.

In addition to sales growth, supermarket chains are introducing new store formats, new sections within stores and are expanding into areas where they did not previously have presence. For example, Soriana's Mercado format is modeled on the traditional Mexican market with a limited selection of staples and low prices. On another front, Waldo's Mart (<http://waldos.cnet18.users.net/content.php?action=index>) has quietly grown its chain of single-price stores to include 148 units across the country. Reportedly, Wal-Mart and Gigante are considering a single-price format. Wal-Mart also is experimenting with specialty areas, like organic foods within supermarkets. Wal-Mart and Sam's Club have just opened 'new product' sections in their respective purchasing departments to introduce products specifically geared to the Mexican consumer. Finally, there is a concentrated movement of club stores like Costco, Sam's Club and City Club to open in resort areas and sell to hotels and restaurants there (thus filling a void as there is no national supplier of HRI products in Mexico).

Finally, a veritable revolution in purchasing and distribution is ongoing. Wal-Mart, Soriana, Comercial Mexicana and Gigante have all introduced distribution centers for fresh and frozen, or dry goods or both. The latter three supermarkets also have formed a single purchasing company for dry goods, Sinergia, in an effort to combat the buying power of Wal-Mart. Consequently, supermarket chains are rapidly reducing purchases from traditional central markets. In addition, the leading chains are quickly moving to systems of preferred suppliers and specialized distributors.

What this means for exporters:

- Traditional retail sales and marketing chains are changing rapidly. Be prepared to make new contacts to keep your products on store shelves.
- Supermarkets are more and more interested in buying directly from suppliers, bypassing traditional distributors.

- If you have been selling into the HRI sector and want to take advantage of the club store movement to supply hotels and restaurants, you will have to label your products as if they were for retail sale.
- Competition is fierce and retailers are constantly searching for new products, so you cannot take the Mexican market for granted. Come every year to trade shows or to your distributors with your new products, as that is what consumers want.

#### 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 and 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 (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.

For additional information on the retail sector, please refer to the GAINS Mexican retail report MX5303

## **B. Food Processing Sector**

In Mexico, food processing is categorized under the Foods, Beverages & Tobacco division. This division is made up of 13 branches: meat & dairy, fruits & vegetables, wheat, corn, coffee, sugar, oil and edible fats, forage, alcoholic beverages, beer & malts, soft drinks, tobacco and other food products. According to the Business Registry of the Mexican Secretariat of Economy (SIEM), there are over 8,000 food & beverage processing companies, generating over half a million jobs, and handling a range of over 20,000 different products.

Mexico offers very good opportunities for suppliers to the processed foods sector. The demand for processed foods is increasing, and the industry is keeping pace; the sector's production value grew by an average 11.5 percent annually for the last five years. It is worth mentioning, however, that such growth is increasing at a decreasing rate; i.e., in 2000 the sector grew 20% from the previous year, whereas last year's growth was only 8%.

There are several emerging consumer and industry trends that are shaping the food processing industry. Mexico is the world's largest per-capita consumer of soft drinks, which is a serious health issue in this age of healthy eating. An increase in the number of people plagued by diabetes and obesity, along with an aging population coincides with a market shortage of items geared towards these groups. Nonetheless, the consumption of fruit (fresh and prepared), meat products and dairy (especially yogurt and similar goods) is on the rise. A new class of Mexican consumers is demanding products that are healthy, convenient and innovative.

Additionally, companies in the food-processing sector have formed strategic alliances with foreign companies in search of technology, raw materials and capital. U.S. suppliers dominate Mexican imports of raw materials and foreign direct investment for the sector. Between 1999 and 2004, US\$ 3.86 billion in foreign investment flowed into 645 companies registered in this manufacturing division, out of which 50% received U.S. capital. Also, Mexico imports from the United States six times as much of raw material for the industry as it exports, and imports to the sector grew 23 percent between 2001 and 2003. The figures indicate a strong and growing dependence upon foreign suppliers to the industry, and U.S. suppliers are well positioned to take advantage of these opportunities.

The following imports of raw materials for the food-processing sector experienced the highest rates of growth from 2004 to 2005:

Tobacco (54%)	Other animal products (29.2%)
Live animals (53.3%)	Live plants and flowers (23.3%)
Meat and seafood preparations (47%)	Fisheries and seafood (23%)
Cereal preparations (36.6%)	Vegetables, roots and tubers (19.7%)
Juice, vegetable extracts (32.8%)	Raw meat (18.2%)
Coffee, tea and spices (32.7%)	Dairy products, eggs and honey (17.1%)

Market studies have revealed some of the products with the highest growth potential in this sector. The products listed below follow new trends in the international markets such as the proliferation of Mexican-style restaurants, or the market demand for organic food. Others have potential due to the recognized craftsmanship of Mexican bakers, brewers and candy makers. Whatever the reason, the production of processed foods and beverages will certainly demand raw materials from other countries, and U.S. suppliers have a clear advantage to provide them.

#### A. Products available in the Mexican market that have good sales potential

- Beef, pork, turkey and chicken meat
- Marinated poultry
- Bovine, sheep and goat fat
- Pizza crust & toppings
- Dairy products
- Sunflower oil
- Yogurt
- Ice cream bars
- Fruit flavored drinks
- Dry soup preparations
- Concentrates (fruit juice and other
- Beef cuts boneless
- Mechanically de-boned poultry
- Raw turkey
- Mixed fruit juice
- Spicy candy
- Wheat flour
- Breakfast bars
- Soybean and soybean oil
- Mixed and salted nuts
- Instant soups
- Multi-grain baked goods

beverage concentrates)

B. Products not available in large quantities that have good sales potential

- Malt extracts
- Meal flakes (i.e. oat, bran & soy)
- Cookie dough and baking mix inputs
- Sunflower seeds
- Spices
- Potato flakes
- Natural and artificial spices and flavorings

### C. Hotel, Restaurant, Institutional (HRI) Sector

Mexico's hotel, restaurant and institutional food services (HRI) sector continues to provide export opportunities. During 2004, Mexico recovered from the worldwide tourism slump receiving a record 20.6 million international visitors who spent over \$10.7 billion. Tourism's contribution to the economy during the year reached \$54 billion representing 7.7 percent of the national GDP.

In 2004, Mexico's Secretary of Tourism, reported 13,060 hotels with 515,904 rooms in Mexico with 43 percent of them being Four and Five star hotels. According to the National Chamber of the Restaurant Industry (CANIRAC), Mexico has around 221,000 established restaurants, which reported sales of \$14 billion in 2004.

US suppliers continue to enjoy favorable market conditions as Mexican consumers become more discerning and American restaurants and hotel chains expand operations in Mexico. US products are perceived to be of higher quality than those of local producers, especially red meat, poultry and dairy products. American products dominate imports with the main competition coming from local firms. Of all food products consumed in hotels, approximately 15 percent is imported.

Independent distributors continue to be the main suppliers for the HRI sector, however, they have been experiencing greater competition from large club stores which have been aggressively pursuing their share of this market.

The largest growth is seen in tourist destinations such as the Mexican Caribbean (Cancun and recently the Mayan Riviera), Huatulco in the South and, Los Cabos and Puerto Vallarta on the West Coast. The main distribution centers continue to be the large central markets located in Mexico City, Monterrey y Guadalajara. However, with the modernization of port and airport infrastructure as well as logistic centers in many places, cities such as Cancun receive most of its imported items directly.

While some hotels and restaurants do import directly, US suppliers need to serve the market through an established distributor. Some hotels and restaurants, especially those belonging to chains/franchises, have centralized controls that limit their individual ability to purchase new items, however, they are always looking for new products.

The best prospects for US exporters are with the large hotel groups and international-class restaurants since smaller establishments use fewer processed foods and a limited number of imported goods. Many restaurants make purchases of US products directly from club stores, particularly for frozen meat, poultry and dairy products.

For additional information on the HRI sector, please refer to the upcoming Mexico GAINS HRI report to be released in early 2006.

#### Section IV. Best High Value Product Prospects

US consumer ready product sales continued their climb to record levels increasing 7 percent to \$3.4 billion in 2004 with record sales across many product categories: poultry meat, dairy, fresh vegetables, processed fruit and vegetables, breakfast cereals and mixes, processed meat and wine and beer. In addition, record sales were registered for intermediate and bulk products.

#### US EXPORTS OF CONSUMER READY AND INTERMEDIATE AGRICULTURAL PRODUCTS

(In Thousands of US Dollars; Calendar Year Information)

Product	2002	2003	2004	Jan-Aug 04	Jan-Aug 05
Dairy Products	201,961	251,385	387,263	228,079	325,925
Poultry Meat	173,825	259,536	330,652	200,366	288,990
Snack Foods	157,813	179,657	190,606	111,267	144,310
Bfast cerals/dry mixes	49,767	57,318	60,608	36,534	36,438
Processed Fruits and Vegetables	329,832	383,768	402,906	252,753	253,332
Wine/beer	43,456	57,299	66,006	44,206	50,274
Red Meats (fresh/chilled/frozen)	1,077,403	1,126,343	1,067,870	470,885	725,950
Red Meats (prepared/preserved)	89,211	157,087	91,624	53,095	60,109
Rice	103,465	140,398	182,823	129,150	109,282
Soybean Meal	86,757	150,812	216,477	144,434	184,026
Wheat flour	5,700	9,998	7,846	5,089	5,540
Forest products	384,301	396,817	458,614	300,852	333,294

\*Indicates the percent growth shown in the first six months of 2004 as compared to the same period in 2003.

\*\*The large decrease in sales of fresh/chilled frozen red meats and the small increase in prepared/preserved red meats were due to the BSE case in the United States and subsequent import ban. US red meat sales to Mexico are an excellent long-term prospect.

## Section V. Key Contacts and Further Information

The primary mission of the US Agricultural Trade Office (ATO) in Mexico City is to assist in the market development and promotion of US 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 US agricultural interests in Mexico. If you have any questions or comments regarding this report or need assistance exporting US food and beverage products to Mexico, please contact the ATOs in Mexico City or Monterrey.

The ATO Mexico City has changed its location along with the nine cooperators that were formerly co-located at the Jaime Balmes address. The addresses below are updated and should be used for all contacts.

### US Agricultural Trade Office, Mexico City

Bruce Zanin, Director  
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#### US WHEAT ASSOCIATES

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**WASHINGTON STATE APPLE COMMISSION**

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## Appendix I. Statistics

### A. Key Trade and Demographic Information

Agricultural Imports from All Countries (1)	\$11,800 million
US Market Share (1)	73 percent
Consumer Food Imports from All Countries (1)	\$5,713 million
US Market Share (1)	70 percent
Edible Fishery Imports from All Countries (1)	\$206 million
US Market Share (1)	27 percent
Total Population/Annual Growth Rate	105.36 million/ 1.1 percent
Urban Population (Urbanization 75%)	78.80 million
Number of Metropolitan Areas (3)	8
Size of the Middle Class (4)	31 percent of total population
Per Capita Gross Domestic Product	\$6,758
Unemployment Rate	3.6 percent
Percent of Female Population Employed (5)	45 percent
Exchange Rate	US\$1 = \$10.5 Mexican Peso (12/05)

#### Footnotes

(1) United Nations Statistical Data

(2) Figures based on growth of 1.1 percent from 104.21 million 2003 figure

(3) Population in excess of 1,000,000; in order from largest: Mexico City, Guadalajara, Monterrey, Puebla, Leon, Toluca, Ciudad Juarez, Tijuana

(4) This measurement is from 1996, measuring the percent of the population in the middle two income brackets, no more recent income bracket information has been published

(5) Calculated using total number of women 15 –64 years old: 30,255,456 and total number of women employed: 13,490,915, Source INEGI 2000

**B. Mexican Imports****Mexican Imports from the United States and the World**  
(In Millions of USD)

	Imports from the world			Imports from the US			US Market Share		
	2001	2002	2003	2001	2002	2003	2001	2002	2003
<b>Consumer Oriented Ag Total</b>	5659	5438	5713	3851	3795	4016	68	70	70
Snack Foods (Excl. Nuts)	296	284	312	165	167	181	56	59	58
Breakfast Cereals & Pancake Mix	36	43	44	34	41	42	93	96	94
Red Meats, Fresh/Chilled/Frozen	1515	1586	1507	1156	1250	1227	76	79	81
Red Meats, Prepared/Preserved	192	173	161	177	154	136	93	89	85
Poultry Meat	300	246	351	280	233	340	93	95	97
Dairy Products (Excl. Cheese)	737	546	610	232	171	234	31	31	38
Cheese	191	179	190	69	67	76	36	37	40
Eggs & Products	24	29	33	23	27	32	93	91	98
Fresh Fruit	481	411	416	349	295	285	73	72	68
Fresh Vegetables	119	121	115	104	101	96	88	83	83
Processed Fruit & Vegetables	354	365	431	231	238	280	65	65	65
Fruit & Vegetable Juices	42	31	29	34	24	19	81	78	63
Tree Nuts	59	49	62	50	43	56	85	87	90
Wine & Beer	113	125	144	46	54	61	41	44	43
Nursery Products & Cut Flowers	51	49	57	33	29	33	65	59	57
Pet Foods (Dog & Cat Food)	118	113	111	114	105	107	97	94	97
Other Consumer-Oriented Products	1031	1086	1141	753	795	811	73	73	71
<b>Fish and Seafood Products</b>	<b>156</b>	<b>167</b>	<b>206</b>	<b>53</b>	<b>53</b>	<b>56</b>	<b>34</b>	<b>31</b>	<b>27</b>
Salmon	8	6	5	2	1	1	19	21	26
Surimi	3	2	1	1	1	1	39	48	33
Crustaceans	47	53	56	17	16	15	36	30	28
Groundfish & Flatfish	35	49	74	9	11	15	27	22	20
Molluscs	8	7	12	3	3	3	34	39	28
Other Fishery Products	56	50	58	22	21	21	39	41	36

<b>Agricultural Products Total</b>	<b>11627</b>	<b>11495</b>	<b>11800</b>	<b>8606</b>	<b>8635</b>	<b>8623</b>	<b>74</b>	<b>75</b>	<b>73</b>
<b>Ag Fish &amp; Forestry Total</b>	<b>12698</b>	<b>12613</b>	<b>12995</b>	<b>9170</b>	<b>9200</b>	<b>9168</b>	<b>72</b>	<b>73</b>	<b>71</b>

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

## C. Mexican imports from Major Suppliers

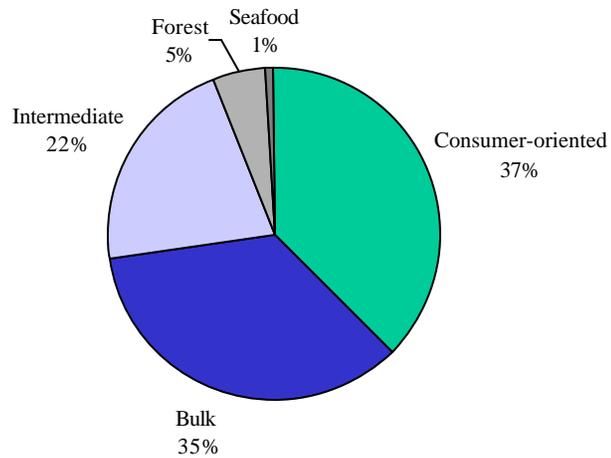
**Mexican Imports from Top 15 Suppliers of Consumer Foods and Edible Fishery Products**  
(In Thousands of USD)

<b>CONSUMER-ORIENTED PRODUCTS</b>				<b>FISH &amp; SEAFOOD PRODUCTS</b>			
	<b>2001</b>	<b>2002</b>	<b>2003</b>		<b>2001</b>	<b>2002</b>	<b>2003</b>
<b>United States</b>	<b>3851191</b>	<b>3794690</b>	<b>4016133</b>	<b>United States</b>	<b>53378</b>	<b>52597</b>	<b>56423</b>
Chile	272211	268410	303182	China (Peoples Republic of)	7130	13982	29136
Canada	373673	351270	271343	Chile	16540	15731	19981
New Zealand	246516	226596	256932	Costa Rica	6850	7829	11232
Spain	65042	69728	80584	Venezuela	8490	8938	10591
Australia	95987	93334	80362	Canada	6535	8166	10575
Argentina	88441	51134	73263	Norway	7005	7641	8190
Germany	67099	54133	66806	Spain	8901	10711	7706
Netherlands	66386	68563	66552	Taiwan (Estimated)	4418	6136	6030
Ireland	37085	47135	49606	Ecuador	8755	6688	5784
France	41890	35994	44431	Thailand	1472	3773	5243
Uruguay	46464	39374	44380	India	4282	3674	3683
Poland	96166	36829	36375	Argentina	1970	1588	3040
Denmark	24503	25222	31434	Colombia	1521	2727	2757
Belgium	33989	32679	30510	Philippines	1216	1461	2715
Other	252175	242602	251022	Other	17840	15779	22598
<b>World</b>	<b>5658818</b>	<b>5437693</b>	<b>5712915</b>	<b>World</b>	<b>156303</b>	<b>167421</b>	<b>205684</b>

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

**D. Charts comparing composition by product category for US sales of agricultural, fish and forestry products**

Product segment's share of Mexico's \$8.49 billion market for US agricultural, fish and forestry products 2004



Product segment's share of Mexico's \$6.1 billion market for US agricultural, fish and forestry products 1999

