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## Mexico

### Retail Food Sector

### Retail Food Sector Report

## 2006

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**Report Highlights:**

Supermarkets and department stores, in Mexico, continue to provide US exporters with the best points-of-sale. There are approximately 1,930 retail stores in Mexico selling food and beverages, a figure that includes outlets for major retail chains and government stores, but excludes convenience and small family stores. The major retailers are developing increasingly sophisticated distribution systems. However in the case of frozen foods and perishables, retail stores still depend heavily on local distributors.

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## Section I. Market Summary

There are approximately 1,930 retail stores in Mexico selling food and beverages, a figure that includes outlets for major retail chains and government stores, but excludes convenience and small family stores. The retail market posted a four percent increase in sales from 2004 to 2005. Formal retail space expanded by 7.5 percent in 2005. Based on information available up to 2004, retailers invested an annual average of \$1,400 million to establish new outlets and increase floor space.

The major retailers are developing increasingly sophisticated distribution systems. However in the case of frozen foods and perishables, retail stores still depend heavily on local distributors.

Supermarkets and department stores continue to provide US exporters with the best points-of-sale. Convenience stores are potentially excellent venues for US products. Two main reasons for this success are because these stores offer twenty-four hours a day service and due to the large number of outlets, clients do not have to travel too far. Unfortunately, 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 due their small size and limited purchasing capability.

**Table. 1. Advantages/Challenges for US Exporters Targeting Mexico’s Retail Sector**

Advantages	Challenges
Retail stores are modernizing and adding more freezer space to accommodate frozen foods.	Mexican industry is offering more frozen products that compete with imports.
Mexican consumers believe that US products such as red meat, pork, dairy, poultry and other products are of high quality.	Commercial barriers such as phytosanitary and sanitary regulations continue to pose obstacles for importing some US products.
Major retailers are adopting modern, centralized distribution systems that should help US suppliers compete with the powerful delivery networks 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 continue to make up a large part of Mexico’s retail sector, but offer limited market potential for US exporters due their small size and limited purchasing capability.
Because of NAFTA, US products have preferential import duties. Most US food and agricultural product exports to Mexico became duty-free as of 2003.	Mexico has 12 free trade agreements with over 32 countries including major competitors such as the European Union, Chile, and other Central American and South American countries.
Mexico’s domestic production of milk powder, poultry, red meat, canned fruits, sugar, cereals and pet food cannot meet domestic demand (Source: Bancomext).	Many US firms fail to build the necessary in-country sales and servicing infrastructure.
Geographic proximity to Mexico gives US exporters a competitive advantage over third country suppliers.	Imported products are relatively more expensive and take longer to arrive in the marketplace

## 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 US pavilions at several Mexican trade shows and can assist in contacting distributors and arranging interviews in Mexico.

Once a distributor is established, the US supplier needs to nurture the relationship. Good communication between the supplier, distributor and end-user often is cited by interviewees as one of the most important components to building a successful distribution network in Mexico. US 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 US 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. It is important to develop product information/promotional pamphlets in Spanish. Food and beverages packaged for retail consumption in Mexico must be labeled according to NOM –051-SCFI-1994 regulations (See [www.mexico-usato.com](http://www.mexico-usato.com) and click on Mexican Food laws, then click on NOM 051 food labeling). 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.

#### Private Label.

Currently all retailers, supermarkets, specialty and department stores, have introduced their own private labels. Depending on the format of the business, private label products may account for as much as 20-30% of consumer sales. At a global level, private label products represent 17 percent of consumer product sales, but in Mexico this proportion averages generally around 3 percent, according to a recent domestic study. Private label products generally are marketed at a reduced price from their branded counterparts. In global terms, average prices for private label products tend to be 30 percent less than their branded counterparts. (Source: ACNielsen)

#### 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 Supercenter, Casa Ley, Soriana Comercial Mexicana, 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, 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, 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: National Supermarket and Department Stores Assn. (ANTAD) [www.antad.org.mx](http://www.antad.org.mx)

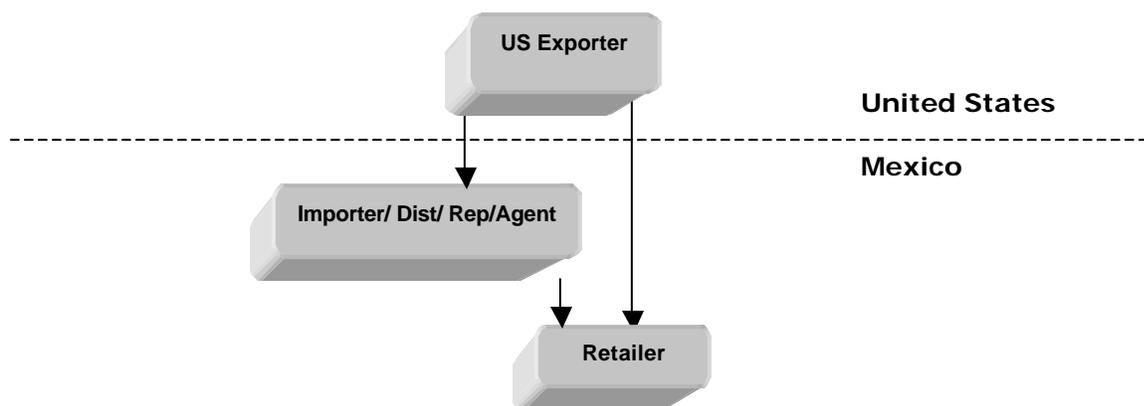
Consumers from all socioeconomic levels shop at stores in these categories, although primarily clients tend to be from the middle and upper-income groups. The exceptions are the "Club" formats, which require members to pay a yearly fee, effectively excluding lower income consumers. These consumers more 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, hotels and restaurants. It is very common for restaurant owners and distributors to buy US 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. Superama, Wal-Mart, Comercial Mexicana, Gigante, and Soriana serve prepared dishes, sold by weight, that customers pack themselves for immediate consumption at home. Almost every retailer has an in-store bakery, tortilla shop, pharmacy and ATM machines.

**Distribution.** US 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, and HEB are all capable of direct purchasing and may deal

directly with foreign suppliers. However, even the largest retailers depend heavily on local distributors for imported products.



Soriana, Gigante and Comercial Mexicana received the authorization of the Mexican Anti-Trust Commission to create SINERGIA, a purchasing and distribution enterprise created specifically to help these retailers compete with the market leader, Wal-Mart. Even when their sales are combined, they sell less than the US-owned giant, which controls 45 percent of the market.

**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 (110), Supermarkets (57), Clubs (75), Warehouses (247) <a href="http://www.walmart.com.mx">www.walmart.com.mx</a>	Wal-Mart, 62.4%	16,147	489	All major cities	Direct, local distributors, importers
Grupo Gigante, SA de CV Hypermarkets (90), Supermarkets (133), Warehouses (39), Gigante USA (8) <a href="http://www.gigante.com.mx">www.gigante.com.mx</a>	Local	2,853	270	All major cities and California	Direct, local distributors, importers
Comercial Mexicana, SA de CV Megamarket (52), Warehouses (36), Supermarkets (71), Club (Costco)(32) <a href="http://www.comerci.com.mx">www.comerci.com.mx</a>	Local	3,664	191	México City and Central México	Direct, local distributors; importers
Organización Soriana, SA de CV Soriana (159), Mercado Soriana (56), City Club(21) <a href="http://www.soriana.com.mx">www.soriana.com.mx</a>	Local	3,331	236	All major cities	Direct, local distributors; importers
Grupo Comercial Chedraui, SA de CV	Local	1,045	94	Major cities in South and	Direct and local

Hypermarkets (60), Warehouse (10), Supermarkets USA (5), Convenience (19) <a href="http://www.chedraui.com">www.chedraui.com</a>				Central México, and California	distributors
HEB, SA de CV Hypermarkets (9), Supermarkets (12) <a href="http://www.heb.com">www.heb.com</a>	US owned	N/A	21	Northern Mexico	Direct, local distributors
Calimax Supermarkets (44) <a href="http://www.calimax.com.mx">www.calimax.com.mx</a>	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) <a href="http://www.comercialvh.com.mx">www.comercialvh.com.m x</a>	Local	N/A	46	Northern Mexico	Direct, local distributors
Super San Francisco de Asis, SA de CV Hypermarkets (2), Supermarkets (36)	Local	N/A	38	Southern Mexico	Direct, and local distributors

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

Figures from 2006.

The top retail food chains are increasingly supplying their stores via centralized distribution centers. 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 distribution centers. Suppliers report paying a 2.5 to 8.0 percent fee to the retailers for shipments delivered to the retailer's distribution centers, instead of delivery to the independent stores, thus reducing their distribution/delivery costs.

## 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: US 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 drinks are brisk.

## Market Structure

In the year 2006 there will be 6,000 stores and mini supers in Mexico. The most aggressive chains are owned by the two largest brewery groups in Mexico, FEMSA with “OXXO” and Modelo with “EXTRA”.

For many Mexicans, “mom and pop” and “corner” stores are the most important retail distribution channels. For massive consumption items these retail outlets can account for up to 77% of their sales. Nevertheless, these small groceries have had to follow more and more the same marketing concept of the convenience stores. Some analysts believe that convenience stores will eventually replace grocery stores and corner shops. The extended schedule (sometimes 24 hours) seems to compensate sufficiently for the limited supply of products and frequently higher prices. The pioneer in Mexico is 7-Eleven that arrived in 1976 with a format proven in the United States. At the moment, 7-Eleven operates 500 stores that generate an income of nearly \$600 million a year.

In the year 2000, OXXO began to implement an expansion strategy of opening 500 stores per year. They grew from 1,468 stores to 3,500 by the close of 2004 and revenues are close to \$1.6 million. Also “EXTRA”, although more cautious, has followed a similar policy of growth and it hopes to close 2006 with 750 units.

Other convenience store/retail chains that populate mainly the North include Matador, Pothook BIP-BIP, Del Rio and AM.PM. They owe their market penetration to their proximity with the United States, where the format is common. Altogether there are 5,000 convenience stores with annual sales over \$2.6 million. Analysts believe that by the end of 2006, there will be 6,000 stores with annual sales of \$3.1 million.

“Kiosks” can be found on highways (usually near tollbooths) and other high traffic areas. One chain, Súper Kompras Micro, has 31 locations nationwide. These outlets can vary from permanent small stores to mobile trucks. Kiosks offer soft drinks, hot beverages, snacks and confectionery products.

Petroleos Mexicanos (Pemex), the state-owned oil company, now allows private operation at its service stations. Virtually all of Mexico’s 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 terms of 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	2005 Sales US\$ Millions	Number of Outlets	Locations City/Region	Purchasing Agent Type
Cadena Comercial OXXO <a href="http://www.oxxo.com.mx">www.oxxo.com.mx</a>	Cerveceria Cuauhtémoc	\$1.600 M	3,500	Major cities and regions	Direct Purchase and local distributors
Matador	Part of OXXO	NA	NA	Major cities	Direct Purchase and local distributors
7-Eleven México, SA de CV <a href="http://www.7-eleven.com.mx">www.7-eleven.com.mx</a>	Joint venture with local ownership	\$600 M	500	Major cities	Direct purchase and local distributors

Comextra (Extra) www.gmodelo.com.mx	Subsidiary of Grupo Modelo	NA	750	Major cities	Direct purchase and local distributors
Circle K	Local ownership	NA	100	Major cities	Direct purchase and local distributors
Super Kompras Micro	Local ownership	NA	31	Major toll highways	Direct purchase and local distributors
Comercial Nortena (Supers Rapidito Bip Bip)	Local ownership	NA	76	Cd. Juárez	Direct purchase and local distributors
Almacenes Distribuidores de la Frontera (Superettes; Del Rio)	Local ownership	NA	160	Chihuahua	Direct purchase and local distributors
AM PM	NA	NA	36	Baja California and México City	Direct purchase and local distributors

Source: ANTAD, annual reports, and telephone interviews.

### 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, US exporters should contact local large wholesalers at 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.

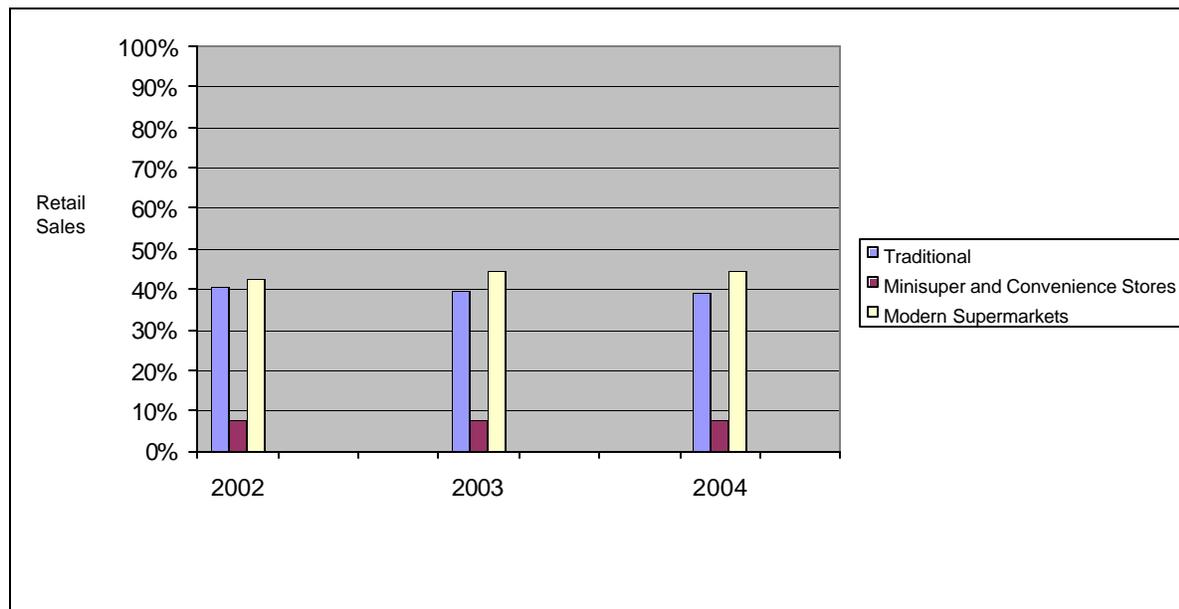
Distributing to high-end specialty stores is similar to selling to other major retailers. This will almost certainly be accomplished through a local distributor.

#### 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.

It is estimated that close to half of food and general merchandise spending occurs in formal retail channels. The following table details percentages in food distribution through different channels.

**Table 5. Market Share Supermarket vs. Traditional Outlet**

Source: AC Nielsen 2005.

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 distributors for 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 (wholesale food distribution markets found in every city).

The smallest stores, Mom & Pops or "tiendas de abarrotes" (grocery 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. 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 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 25 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") <a href="http://www.ladivina.com.mx">www.ladivina.com.mx</a>	Local	160	Major cities	Importer and local distributor
La Europea México, SA de CV ("La Europea") <a href="http://www.laeuropea.com.mx">www.laeuropea.com.mx</a>	Local	25	Major cities	Import through subsidiary: Importaciones Colombres, SA de CV
Vinoteca México, SA de CV. <a href="http://www.vinoteca.com">www.vinoteca.com</a>	Local	14	Monterrey and major cities	Importer and local distributor
La Castellana <a href="http://www.lacastellana.com.mx">www.lacastellana.com.mx</a>	Local	6	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. Butter from New Zealand, for instance, is well-positioned with Mexico City retailers.

The major retailers are developing increasingly sophisticated distribution systems. Despite advances in logistics, retail stores still depend heavily on local distributors, especially for frozen food and perishables.

Supermarkets and department stores continue to provide US exporters with the best points-of-sale. As mentioned before, convenience stores 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:

<b>Top suppliers of Mexican imports:</b>	
<b>Beef</b>	United States (90%), New Zealand (9%), and Australia (1%).
<b>Dairy</b>	United States (76%), New Zealand (10%), Argentina (6%), Australia (4%).
<b>Confection</b>	United States (46%), China (12%), Canada (5%), Spain (1%).
<b>Baked Goods</b>	Spain (65%), United States (26%), Germany (4%), and U.K. (3%).
<b>Snack Foods</b>	United States (79%), Italy (8%), Peru (1%).
<b>Beverages</b>	United States (95%), France (5%).
<b>Vegetables</b>	United States (100%).
<b>Apples:</b>	United States (86%), Chile (12%), Canada (2%), Argentina (1%).
<b>Corn</b>	Almost all of the yellow corn consumed in Mexico originates from the United States while white corn is nearly entirely domestic.
<b>Cereals</b>	United States (91%), Canada (8%)
<b>Pet Food</b>	United States (89%), France (7%), Argentina (1%).

#### SECTION IV. BEST PRODUCT PROSPECTS

##### A. Products Present in the Market Which have Good Sales Potential

Apples	Bread, pastry, cake, biscuits, etc.
Popcorn	Candies
Dairy products, cheese and ice cream	Chocolate and preparations
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
Jams	Pears
Pork	Prepared foods from cereal
Baked goods	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	Almonds
Peanut butter	Kosher food
Herb teas	Cranberries
Apricots	Blueberries
Cherries	Dehydrated vegetables

## SECTION V. POST 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 (please see the ATO website at [www.mexico-usato.com](http://www.mexico-usato.com) for a list of our services and links to the cooperators).

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

### US Agricultural Trade Office, Mexico City, Mexico (CENTRAL/SOUTH MEXICO)

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