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## Mexico

### Poultry and Products

### Semi Annual Report

## 2009

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**Report Highlights:**

Mexico's poultry production is forecast to decline slightly in MY 2009 (Jan.-Dec.), due to higher production costs created by the devaluation of the peso. Consumption, however, is expected to increase slightly in MY 2009 as consumers favor lower priced poultry meat over other high priced meats. MY 2009 imports are also expected to increase, as imported poultry products for further processing are forecast to increase in response to a growing demand for cheaper processed poultry products.

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Includes PSD Changes: Yes  
Includes Trade Matrix: Yes  
Semi-Annual Report  
Mexico City [MX1]  
[MX]

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**SECTION I. SITUATION AND OUTLOOK**

The poultry meat production forecast was revised downward for both MY 2009 and MY 2008. In MY 2009, Mexican poultry production will face a reduction from the previous year. This decline is primarily attributable to higher production costs due to the adverse affect of changes to the exchange rate for dollar priced imported grains. However, the decline is expected to be temporary and the historical tendency toward increased production that the Mexican poultry industry has experienced over the past decade will eventually continue if at a slower rate.

Imports of poultry products to be used as raw materials are forecast to increase in MY 2009, primarily in response to growing demand from Mexican consumers for cheaper processed poultry products.

GOM officials continue working on a Mexico equivalency agreement with USDA's Food Safety Inspection Service (FSIS) and Animal and Plant Health Inspection Service (APHIS) that would allow for exports of Mexican produced poultry meat and egg products to the United States.

**Note:** Data included in this report are not official USDA data. Official USDA data are available at <http://www.fas.usda.gov/psdonlineonline>

## SECTION II. STATISTICAL TABLES

Table 1. Mexico: Poultry Meat, Broilers PS&amp;D

<b>PSD Table</b>									
<b>Country : Mexico</b>									
<b>Commodity: Poultry, Meat, Broiler</b>									
<b>Poultry, Meat, Broiler (1000 MT)</b>	<b>2007 Revised</b>			<b>2008 Estimated</b>			<b>2009 Forecast</b>		
	<b>USDA OFFICIAL</b>	<b>Post Estimate</b>	<b>Post Estimate New</b>	<b>USDA OFFICIAL</b>	<b>Post Estimate</b>	<b>Post Estimate New</b>	<b>USDA OFFICIAL</b>	<b>Post Estimate</b>	<b>Post Estimate New</b>
<b>Market Year Begin</b>	<b>01/2007</b>			<b>01/2008</b>			<b>01/2009</b>		
Inventory (Reference)	0	0	0	0	0	0	0	0	0
Slaughter (Reference)	0	0	0	0	0	0	0	0	0
Beginning Stocks	0	0	0	0	0	0	0	0	0
Production	2,683	2,683	2,683	2,775	2,825	2,804	2,860	2,910	2,795
Whole, Imports	0	0	0	0	0	0	0	0	0
Parts, Imports	393	395	393	425	425	438	450	450	460
Intra-EU Imports	0	0	0	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0	0	0	0
Total Imports	393	395	393	425	425	438	450	450	460
Total Supply	3,076	3,078	3,076	3,200	3,250	3,242	3,310	3,360	3,255
Whole, Exports	0	0	0	0	0	0	0	0	0
Parts, Exports	9	9	13	12	12	14	15	15	15
Intra EU Exports	0	0	0	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0	0	0	0
Total Exports	9	9	13	12	12	14	15	15	15
Human Consumption	3,067	3,069	3,063	3,188	3,238	3,228	3,295	3,345	3,240
Other Use, Losses	0	0	0	0	0	0	0	0	0
Total Dom. Consumption	3,067	3,069	3,063	3,188	3,238	3,228	3,295	3,345	3,240
Total Use	3,076	3,078	3,076	3,200	3,250	3,242	3,310	3,360	3,255
Ending Stocks	0	0	0	0	0	0	0	0	0
Total Distribution	3,076	3,078	3,076	3,200	3,250	3,242	3,310	3,360	3,255
Not official USDA Data									

**Table 2. Mexico: Mexico City broilers wet market monthly prices 2006-2008, pesos/kilogram**

TABLE 2.MEXICO: MEXICO CITY BROILERS <sup>®</sup> WET MARKET MONTHLY PRICES 2006-2008 PESOS/KILOGRAM				
MONTH	2006	2007	2008	% Change 07/08
JANUARY	23.04	27.00	19.05	(29.44)
FEBRUARY	22.50	24.50	20.08	(18.04)
MARCH	22.73	21.00	22.38	6.57
APRIL	19.25	21.22	25.20	18.75
MAY	26.50	22.96	26.79	16.68
JUNE	19.00	26.13	22.39	(14.31)
JULY	20.33	22.50	22.29	(0.93)
AUGUST	20.58	23.91	21.63	(9.53)
SEPTEMBER	21.50	24.86	22.22	(10.61)
OCTOBER	21.25	25.67	25.84	0.66
NOVEMBER	20.48	30.06	24.80	(17.5)
DECEMBER	23.58	24.42	24.30	(0.5)
<b>ANNUAL AVG.</b>	<b>21.73</b>	<b>24.52</b>	<b>23.08</b>	<b>(5.9)</b>

<sup>®</sup> WHOLE CHICKEN INCLUDING OFFAL

SOURCE: NATIONAL POULTRY ASSOCIATION, UNA.

**Table 3. Mexico: Mexico City Chicken Leg Quarter Wholesale Monthly Prices 2006-2008, Pesos/Kilogram**

TABLE 3.MEXICO: MEXICO CITY CHICKEN LEG QUARTER WHOLESALE MONTHLY PRICES 2006-2008 PESOS/KILOGRAM				
MONTH	2006	2007	2008	% Change 07/08
JANUARY	17.00	21.06	22.05	4.7
FEBRUARY	17.96	20.61	20.79	0.87
MARCH	18.91	18.23	20.83	14.26
APRIL	18.30	19.99	22.22	11.15
MAY	20.87	25.07	25.24	0.67
JUNE	24.66	23.81	25.85	8.56
JULY	18.57	23.99	21.83	(9.00)
AUGUST	22.42	24.78	20.26	(18.24)
SEPTEMBER	20.05	23.65	19.26	(18.56)
OCTOBER	20.00	20.50	20.85	1.70
NOVEMBER	21.66	23.79	23.79	0
DECEMBER	24.50	24.46	26.29	7.48
<b>ANNUAL AVG.</b>	<b>20.41</b>	<b>22.49</b>	<b>22.43</b>	<b>(0.26)</b>

SOURCE: NATIONAL INFORMATION MARKET SERVICE, (SNIIM)

2006 EXCHANGE RATE AVG.: U.S. \$1.00 = 10.90 PESOS

2007 EXCHANGE RATE AVG.: U.S. \$1.00 = 10.92 PESOS

2008 EXCHANGE RATE AVG.: U.S. \$1.00 = 11.14 PESOS

Table 4. Mexico: Imports of Poultry Products by H.S.T. Code, Jan.-Oct. 2008 in MT.		
H.S. TARIFF NUMBER	DESCRIPTION & COUNTRY OF ORIGIN	VOLUME MT
0105.11.01	Day old chicks, which do not need feeding during transport	
	U.S. & TOTAL (Thousand head)	1,455
0105.11.02	Breeding stock, layer-type with selected breed certificate when imports are no more of 15,000 heads in each operation	
	U.S. & TOTAL (Thousand head)	745
0105.11.99	Other	
	U.S. & TOTAL	22
0105.19.99	Other (Chickens)	
	U.S. & TOTAL (Thousand head)	1,395
0207.11.01	Other fresh or chilled whole poultry	
	U.S. & TOTAL	5,797
0207.12.01	Other frozen whole poultry	
	U.S. & TOTAL	3,535
0207.25.01	Whole frozen turkey	
	U.S.	2,533
	CHILE	1,040
	OTHER	0
	TOTAL	3,573
0207.33.01	Whole ducks, geese & guineas frozen	
	U.S. & TOTAL	868
0207.26.01	Mechanically deboned turkey meat	
	U.S. & TOTAL	18,571
0207.26.99	Fresh & chilled turkey parts	
	U.S. & TOTAL	91,758
0207.13.01	Mechanically deboned chicken meat fresh or Chilled	
	U.S. & TOTAL	124,512
0207.14.01	Mechanically deboned chicken meat frozen	
	U.S.	33,211
	CHILE	5,335
	TOTAL	38,546
0207.13.99	Fresh & chilled chicken parts	
	U.S. & TOTAL	10,113
0207.14.99	Frozen poultry parts	
	U.S.	10,691
	OTHER	12,645
	TOTAL	23,336
0207.13.03	Chicken Leg Quarter, Fresh/chilled	
	U.S.	49,356
	OTHER	0
	TOTAL	49,356
0207.14.04	Chicken Leg Quarter, Frozen	
	U.S.	74,277
	OTHER	1,846
	TOTAL	76,123
0207.27.01	Mechanically deboned turkey meat, frozen	
	U.S.	7,649
	OTHER	663
	TOTAL	8,312
0207.27.99	Frozen turkey parts	
	U.S.	35,301
	OTHER	2,093
	TOTAL	37,394
0207.36.99	Duck, geese or guineas cuts, frozen	
	U.S. & TOTAL	82
0207.14.02 & 0207.36.01	Poultry livers	

Table 4. Mexico: Imports of Poultry Products by H.S.T. Code, Jan.-Oct. 2008 in MT.		
H.S. TARIFF NUMBER	DESCRIPTION & COUNTRY OF ORIGIN	VOLUME MT
	U.S. & TOTAL	4
0407.00.01	Table eggs, fresh, including hatching eggs	
	U.S. & TOTAL	203
1601.00.01	Sausages of broiler or turkey	
	U.S.	17,145
	OTHER	0
	TOTAL	17,145
1602.31.01	Processed meat (Turkey)	
	U.S.	1,345
	OTHER	113
	TOTAL	1,458
1602.32.01	Prepared or preserved chicken meat or offal	
	U.S.	11,026
	OTHER	783
	TOTAL	11,809
1602.39.99	Other processed poultry meat	
	U.S.	12
	FRANCE	6
	OTHER	0
	TOTAL	20
0207.13.02	Chicken carcasses	
	U.S. & TOTAL	10,769
0207.14.03	Chicken carcasses	
	U.S. & TOTAL	112
0207.26.02	Turkey carcasses	
	U.S. & TOTAL	0
0207.27.03	Turkey carcasses	
	U.S. & TOTAL	0

SOURCE: GLOBAL TRADE INFORMATION SERVICES, INC. "WORLD TRADE ATLAS" MEXICO EDITION, OCTOBER 2008.

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

#### CHICKEN MEAT

##### Production

Mexican chicken meat production was forecast to decrease in MY 2009 (Jan.-Dec.) by 0.3 percent due to the stabilization of Mexican production after overproduction in MY 2008. The number one factor affecting chicken production in Mexico is the exchange rate. While world grain prices have generally declined since summer 2008, the cost of production for Mexican producers has failed to follow due to the concurrent devaluation of the peso keeping dollar-based grain prices relatively high. Today in Mexico, 65 percent of the total cost of poultry production is linked to dollar-based inputs. For example, the Mexican Poultry Producers Association (UNA) estimates that for every 1,000 pesos/ton (\$68.44/ton)<sup>1</sup> increase in coarse grains prices, poultry prices increase by about 2 pesos/kg (\$0.14/kg).

The MY 2008 production estimate was revised down 0.7 percent based on final industry data but remains one percent higher than MY 2007. In 2008, high grain prices caused higher prices for chicken meat (highest in April and May), thus consumer demand decreased. This forced producers to initially raise birds to a higher slaughter weight. However to compensate for higher weighted birds producers moved to depopulate flocks. Thus, during August and

<sup>1</sup> Exchange: 14.61 pesos per dollar, Source Banxico February 17, 2009

September within the Mexico City metropolitan area producers began offering chicken breast, as well as legs and thighs, at lower prices.

Poultry producers continue to be major users of imported feedstuffs from the United States. Mexico, a grain deficient country, lacks sufficient supplies to cover domestic demand. Furthermore, imported yellow corn contains superior nutritional values and produces a more favorably colored meat for consumers. According to the UNA, feed consumption for chicken meat production in MY 2008 was 7.5 MMT, (4.7 MMT of feed grains, 1.5 MMT of oilseeds and protein meals, and 1.3 MMT of other raw materials). UNA's total estimate of feed consumption increased only 1.14 percent from MY 2007 (Jan-Dec).

Consolidation with the Mexican industry is expected to continue. Medium-size companies will likely continue to merge into cooperatives and associations, with smaller players becoming contract producers. However, investment in additional infrastructure could be postponed until the effects of the economic crisis become more certain. Furthermore, the marketing and promotion of poultry meat is expected to slightly decrease, while current investigation and research on egg, chicken and turkey is expected to continue.

### **Consumption**

The consumption estimate for MY 2009 was revised downward to 3.24 MMT. In spite of the financial crisis, chicken producers continue to enjoy similar demand for their products, and poultry consumption will remain steady due to the affordability of chicken relative to other meats. Moreover, increased usage in processed food products, along with improved product quality, will continue to support poultry consumption. For 2009, the exchange rate's impact on production cost, and therefore consumer prices, could result in lower demand for broiler chicken.

Consumption for MY 2008 was revised downward 3.23 MMT. For most of 2008, poultry producers paid higher grain prices and thus, demand decreased due to higher chicken meat prices. Consumption for MY 2007 was revised downward as result of slower imports and higher export data.

The past year was a very volatile year for poultry prices. For the first half of the year consumer prices for chicken leg quarters (CLOs) were significantly higher compared to prices registered in 2007. However, prices fell throughout the year primarily because of the overproduction and, despite all the price volatility, CLOs eventually registered a small decrease in average yearly price from 22.49 pesos/kg (US\$1.54/kg) to 22.43 pesos/kg (US\$1.53/kg). The average broiler price for 2008 was 23.08 pesos/kg (US\$1.58/kg) which was 5.8 percent lower than in 2007.

## Trade

The forecast for imports of chicken cuts, mainly CLQs and mechanically separated chicken, for MY 2009 was revised higher over the previous estimate. The meat processing industry expects to import more raw materials such as mechanically separated chicken and turkey meat due to higher demand for cheaper meat inputs for the production of such items as mortadella, sausage, pastry or hams. These lower priced products maybe the only source of protein for medium and low income consumers who have been affected by the financial crisis. Imports of chicken meat for MY 2008 were revised upward from previous estimates, also due to increased demand from the processing industry.

Another important factor behind the increased estimate for imports is the elimination of the quarantine for products from the state of Arkansas. Mexico imposed an import ban from the state due to an outbreak of low-pathogenic avian influenza (LPAI) in July 2008. As of October 10, 2008, Mexico lifted the import quarantine for all products from the state. (See GAIN reports [MX8057](#) and [MX8080](#)).

The United States is the main supplier of chicken meat to Mexico. However, imports from Chile of mechanically frozen deboned chicken meat represented 13.8 percent of total Mexican imports in the first 10 months of 2008. This is due in part to changing disease conditions within North America which are causing importers to diversify their suppliers.

The top three products imported by Mexico are fresh or chilled mechanically deboned chicken meat, fresh and chilled turkey parts, and frozen chicken leg quarters. Although, imports of poultry products has been increasingly diversified. Recently, Mexican poultry producers have seen higher imports of chicken breasts principally for the self-service supermarkets. Supermarkets import a higher quantity of cuts when prices in the U.S. are cheaper than in the domestic market, as we can now see with some cuts (i.e., thighs, leg quarters and drumsticks<sup>2</sup>).

Exports of Mexican chicken meat have increased slowly. Exports consist of value added products such as ready to eat products (RTE) produced from U.S raw materials. According to UNA one of the principal problems is the restrictions created by the lack of recognition of disease free areas in Mexico by USDA. The Mexican industry has been working with USDA, USAPEEC (U.S.A Poultry and Egg Export Council) and SAGARPA in order to obtain the recognition of *Newcastle*-free status in Nayarit, Baja California, Chihuahua, Coahuila, Durango y Nuevo Leon, as well as to obtain an USDA/FSIS approved establishment for the export of Mexican-origin poultry products to the United States. In addition, UNA has sought the increase of export quotas to the European Union.

Table 5 summarizes some of the regulations currently implemented by the GOM for imports of live poultry and poultry meat from the United States.

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<sup>2</sup> Source: Georgia Department of Agriculture, prices compared from Sept 2008 to January 2009. [http://agr.georgia.gov/00article/0,2086,38902732\\_0\\_40311595,00.html](http://agr.georgia.gov/00article/0,2086,38902732_0_40311595,00.html)

Table 5. Mexico: Current Import Regulations for Poultry and Poultry Products.

ITEM	RAW POULTRY FOR RETAIL & FOR FURTHER PROCESSING	FULLY COOKED POULTRY MEAT AND EGG PRODUCTS	TABLE, SPF AND HATCHING EGGS	LIVE BIRDS
Export Status from All U.S. States <b>1/</b>	YES	YES	YES <b>1</b>	YES
Required Language On Cleaning And Disinfection Of Trucks	YES	NO	YES	YES
Required Sealing Of Trucks At Point Of Origin	NO	NO	NO	YES
Required Language that Product is Fit for Human Consumption and Freely Marketed in the U.S.	YES	NO	<b>2</b>	<b>2</b>
Agar Gel or ELISA Test Required	<b>3</b>	NO	<b>3</b>	<b>3</b>
Certification Requirements On Exotic Newcastle Disease <b>4</b>	YES	YES	YES	YES

**1/** These imports are only approved to proceed to Federal Inspected Plants (TIF) meat processing facilities authorized by SAGARPA. It remains prohibited the import of products and poultry by-products original of Arkansas, E.U.A. that come from birds sacrificed between May 10 until July 14, 2008.

**1** Boxes of table eggs as well as SPF eggs must show the stamp of the competent authority.

**2** SPF, hatching eggs and live birds should be freely marketed in the U.S.

**3** When a plant and farm/flock is registered under the National Poultry Improvement Plant (NPIP), the Agar Gel or ELISA test will not be required; otherwise the tests will be required by SAGARPA.

**4** Exotic Newcastle Disease statement for meat, meat products and by products. - "That the product comes from flocks that have a monitoring program of 70 birds that began after 12 days of age, using viral isolation tests and identification of velogenic strains through a test that indicates intracerebral pathogenicity in chicks of one day of age and that is carried out for each lot that is delivered for slaughter, obtaining negative results for Velogenic Newcastle disease, or that comes from a country free of Velogenic Newcastle Disease."

For additional information regarding poultry meat and egg products exports to Mexico see the FSIS Export Library at

[http://www.fsis.usda.gov/Regulations\\_&Policies/Mexico\\_Requirements/index.asp](http://www.fsis.usda.gov/Regulations_&Policies/Mexico_Requirements/index.asp)

(Export Requirements for meat and poultry products).

The Mexican phytosanitary requirements sheets (HRZ's) for each kind of import product to Mexico are available at

<http://148.245.191.4/zooweb/inicio.aspx>

**Source:** Made with information with information from the Sanitary sheet from Mexican Animal Health direction.

## Policy

Domestic poultry producers have faced a difficult year beginning with increased grain prices and then ending with the peso devaluation. The rapid increase in grain prices forced many producers to liquidate future grain contracts for a loss. They continued to suffer losses when it was necessary to purchase grains on the international market at higher rates because of the peso devaluation. In response, the Mexican Secretariat of Agriculture (SAGARPA) announced a series of government support programs intended to help the livestock sector cope with high international corn prices. The "Extraordinary Program" establishes that under the "Forward Contracts" and the "Anticipated Purchases" (see GAIN Reports [MX7024](#) & [MX7071](#)) programs, poultry producers sourcing domestic crops will be granted a subsidy of 200 pesos per MT (13.69 \$/ton). (See GAIN Report [MX8017](#)). The eligible crops were yellow and white corn and sorghum from the Tamaulipas, Baja California, Sinaloa and Sonora states of 2007/08 fall/winter crop. According to SAGARPA records, for 2008, poultry producers asked for support payments for the purchase of 974,000 MT of grains.

Domestic producers have also been looking for alternative financing options to avoid or minimize the effects of the markets on their revenue streams. To address the devaluation of the peso SAGARPA has also established a minimum parity pesos-dollar rate of 12.50 for all future contracts registered in the forward contract program. (See GAIN report [MX9007](#)). Meanwhile, the public agency for agricultural finance, Financiera Rural, signed an agreement with the Mexican poultry industry called "Credit Alternatives for Financial Strengthening". The agreement's primary purpose is to provide credit to the poultry feed sector. Currently valued at one billion pesos this account has lessened fears regarding the lack of capital for this sector, due to higher grain prices. The details of this agreement have yet to be finalized, such as the amount of credit available for each producer and the interest rates have yet to be established. To ensure the lowest interest rate is available to the producer members, SAGARPA has guaranteed funding of 100 million pesos for liquid guaranty.

In order to export to Mexico, USDA/FSIS must seek official approval from SAGARPA for each establishment that wishes to export meat products to Mexico. In November 2008, after many months without action, SAGARPA began to approve the outstanding requests from USDA/FSIS dating as far back as May 2007. The initial approvals installed export authority for 109 new U.S establishments. Of this total, 79 U.S establishments seeking authority to export poultry products were approved.

December 22, 2008, SAGARPA revoked the eligibility to export product to Mexico for 30 U.S establishments due to multiple port of entry violations. Three of these establishments were poultry plants. However, after USDA provided proof that the required corrective actions were taken in the establishments, most plant's eligibility was re-instated within the first month of 2009.

The Animal Health area of SAGARPA announced on January 29, 2008 that the importation of frozen meat and frozen meat products in "combos" would be prohibited. In addition, on February 12, 2009, SAGARPA announced that new inspection procedures for products shipped in "combos" would be in place as of April 20, 2009. This new procedure is part of a plan to modernization and harmonization international procedures with NAFTA partners.

## Marketing

The USA Poultry & Egg Export Council (USAPEEC), a non-profit, industry-sponsored trade organization dedicated to increasing exports of U.S. poultry and egg food products in all foreign markets, is very active in the Mexican market. USAPEEC's Mexico office has actively promoted poultry products in various large retail and food service exhibitions within

USDA/Agricultural Trade Show Pavilions like ANTAD and Abastur. Along Mexico's poultry industry, USAPEEC's Mexico office has been promoted the exchange of information and technical expertise between both the U.S. and Mexican poultry industries. For cooked and processed poultry products, USAPEEC has also participated in Exphotel and Expo-Agroalimentaria.

In October 2006, the National Poultry Institute (NPI) was created to provide scientific fact-based information to consumers, researchers and health professionals regarding poultry and poultry products. The NPI has advisers from different universities and specialists in poultry production. Industry members believe that the efforts of NPI have succeeded in increasing domestic consumption of poultry and poultry products in Mexico.

Poultry meat in Mexico is currently sold as whole birds, although sales of chilled or refrigerated poultry cuts meats are continuing to increase principally in supermarkets. The share of supermarket sales are expected to increase according with increasing consumer acceptance of poultry cuts and other RTE poultry products.

#### **OTHER RELEVANT REPORTS**

MX8013: Poultry and Products Semi Annual Report  
<http://www.fas.usda.gov/gainfiles/200803/146293968.pdf>

MX8057: Poultry and Products Annual Report  
<http://www.fas.usda.gov/gainfiles/200809/146295692.pdf>

MX8052: Livestock and Products Annual  
<http://www.fas.usda.gov/gainfiles/200810/146296082.pdf>

MX8017: Annual Grain & Feed Report  
<http://www.fas.usda.gov/gainfiles/200803/146293969.pdf>

MX8050: Update on Grain & Feed  
<http://www.fas.usda.gov/gainfiles/200807/146295326.pdf>

MX8072: October Update on Grain & Feed  
<http://www.fas.usda.gov/gainfiles/200810/146306303.pdf>

MX8075: Mexico Announces Support Program for Sinaloa White Corn 2008  
<http://www.fas.usda.gov/gainfiles/200811/146306401.pdf>

MX8080: Trade Policy Monitoring Annual  
<http://intranetapps/GainFiles/200812/146306629.pdf>