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Post: Mexico City

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Report Highlights:

The Mexican dairy market continues to offer growth potential to both U.S. exporters and domestic producers. Despite pandemic-related economic shocks in 2020, the dairy sector has proven resilient. For producers, a hardy dairy herd, access to water, and sizeable domestic feed production have helped continue to expand yield and milk supply. While ongoing macroeconomic challenges, such as rising inflation and unemployment, have dampened household dairy purchases, a growing population, and the ongoing reopening of key sectors, such as tourism and hotel, restaurant and institutional (HRI), are helping keep dairy demand afloat.

Executive Summary

Fluid Milk: In 2022, production and consumption are forecast basically flat at 12.98 million metric tons (MT) and 13.17 million MT, respectively; imports are forecast at 29,000 MT, a 3-percent decrease; and exports are forecast to fall 12 percent to 15,000 MT.

Cheese: In 2022, production and consumption are forecast to remain flat at 452,000 MT and 563,000 MT, respectively. Imports and exports are forecast to also remain flat at 123,000 MT and 12,000 MT, respectively.

Butter: In 2022, production, consumption, and imports are forecast to remain flat at 236,000 MT, 261,000 MT, and 28,000 MT, respectively. Exports are forecast at 3,000 MT, a 50-percent increase to pre-pandemic numbers.

Skim Milk Powder (SMP): In 2022, production, consumption, and imports are forecast to remain flat at 46,000 MT, 348,000 MT, and 340,000 MT, respectively. Exports are forecast at 38,000 MT, a 6-percent increase.

Dry Whole Milk Powder (WMP): In 2022, production and consumption are forecast to remain flat at 124,000 MT and 113,000 MT, respectively. Imports and exports are forecast to increase 14 percent to 8,000 MT and 6 percent to 19,000 MT, respectively.

Commodities:

Dairy, Milk, Fluid
 Dairy, Cheese
 Dairy, Butter
 Dairy, Milk, Nonfat Dry
 Dairy, Dry Whole Milk Powder

Fluid Milk

Table 1: DAIRY, MILK, FLUID – PRODUCTION, SUPPLY, AND DISTRIBUTION

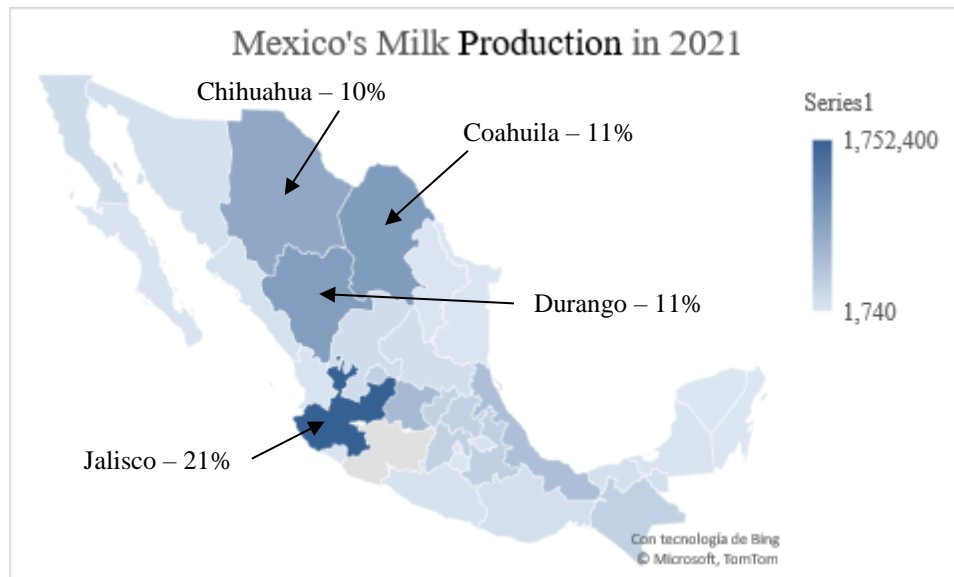
| Dairy, Milk, Fluid Market Year Begins Mexico | 2020 | | 2021 | | 2022 | |
|--|---------------|----------|---------------|----------|---------------|----------|
| | Jan 2020 | | Jan 2021 | | Jan 2022 | |
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Cows In Milk (1,000 HEAD) | 6,550 | 6,550 | 6,600 | 6,600 | 0 | 6,650 |
| Cows Milk Production (1,000 MT) | 12,750 | 12,750 | 12,850 | 12,850 | 0 | 12,980 |
| Other Milk Production (1,000 MT) | 171 | 171 | 172 | 172 | 0 | 172 |
| Total Production (1,000 MT) | 12,921 | 12,921 | 13,022 | 13,022 | 0 | 13,152 |
| Other Imports (1,000 MT) | 33 | 32 | 30 | 30 | 0 | 29 |
| Total Imports (1,000 MT) | 33 | 32 | 30 | 30 | 0 | 29 |
| Total Supply (1,000 MT) | 12,954 | 12,953 | 13,052 | 13,052 | 0 | 13,181 |
| Other Exports (1,000 MT) | 16 | 6 | 17 | 17 | 0 | 15 |
| Total Exports (1,000 MT) | 16 | 6 | 17 | 17 | 0 | 15 |
| Fluid Use Dom. Consum. (1,000 MT) | 4,145 | 4,145 | 4,149 | 4,149 | 0 | 4,166 |
| Factory Use Consum. (1,000 MT) | 8,793 | 8,802 | 8,886 | 8,886 | 0 | 9,000 |
| Feed Use Dom. Consum. (1,000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Dom. Consumption (1,000 MT) | 12,938 | 12,947 | 13,035 | 13,035 | 0 | 13,166 |
| Total Distribution (1,000 MT) | 12,954 | 12,953 | 13,052 | 13,052 | 0 | 13,181 |
| (1,000 HEAD), (1,000 MT) | | | | | | |

Production

Calendar year 2021 production is estimated at 12.85 million MT. Production in 2022 is forecast at 12.98 million MT, a 1–percent increase. Mexico’s poor macroeconomic conditions and pandemic-related market shocks pushed many milk producers into bankruptcy or into downsizing their herd. Vertical integration increased and benefited bigger dairy companies with the resources to buy out some of these smaller producers and stay afloat. Some troubled milk producers were able to save their dairies by joining or forming cooperatives.

Despite a struggling economy with a lack of governmental incentives and rising input costs, the dairy herd and its milk production continue to grow. In 2021 and 2022, milk producers expect to face low milk prices and continued high feed costs, putting some downward pressure on dairy herd growth. Producers report feed costs are cutting into profit margins, with feed accounting for up to 80 percent of production costs. Yield per cow is expected to increase, as Mexico’s large milk producers continue investing in improved genetics and better manufacturing practices.

In 2022, other milk production, such as goat milk, is expected to remain flat due to the lack of governmental support to incentivize production.



Source: Mexico's Agricultural Statistics Service (SIAP)

The top milk production states are Jalisco, Chihuahua, Coahuila, and Durango, which together accounted for 53 percent of total production during the first half of 2021.

Mexico's dairy production sector is comprised of approximately 250,000 dairies, the majority of which are micro and small operations with less than 100 dairy cows each. The Lagunera Region (or La Laguna) consists of Durango and Coahuila States and is the biggest milk-producing region in Mexico, with large, industrialized dairies that have heavily invested in technologies and genetics to improve milk quality, yield, heat resistance, and disease resistance. The La Laguna region accounts for 39 percent of national milk production by volume and 22 percent by value, followed by the Jalisco region at approximately 30 percent of national production by volume and 20 percent by value.

Holsteins are the main breed used in more industrialized dairies due to the breed's milk fat percentage and yearly production. Dairies in the La Laguna region average 37 liters per cow per day, compared to dairies in Mexico's southeast that average 9 liters/cow/day using breeds mixed with Cebu cattle (*Bos indicus*).

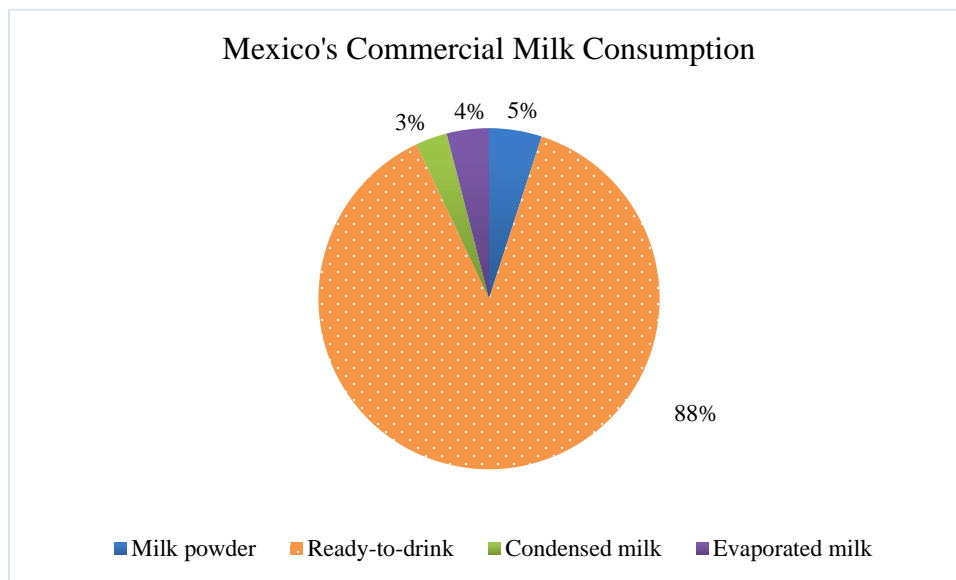
Milk production is stronger during the first half of the year compared to the second half, while milk demand is the inverse – stronger in the second half of the year. A gap exists between the highest and lowest points of production throughout the year. Opportunities exist for dairies and dairy processors to invest in dehydration facilities and other processing technologies to extend shelf life.

Consumption

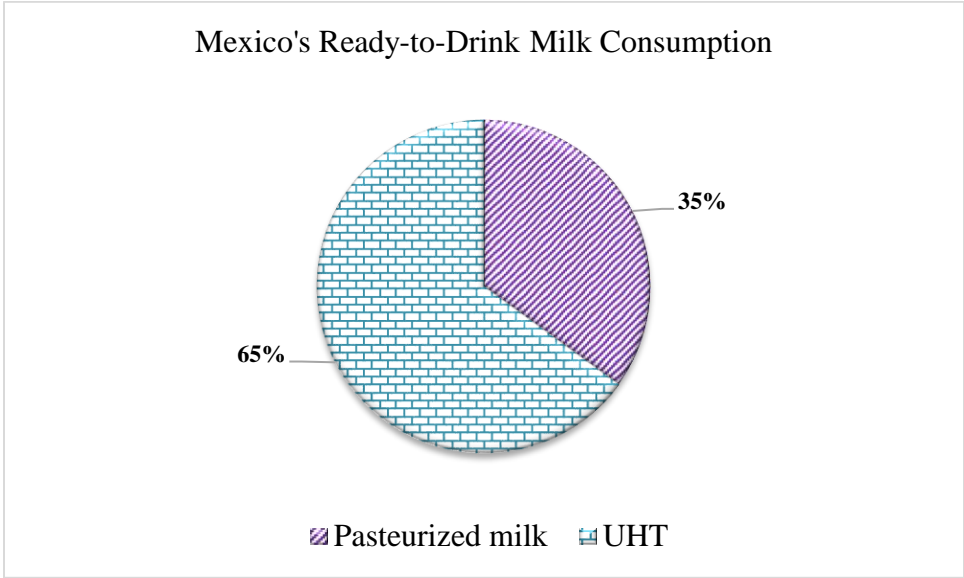
In 2021, consumption is estimated at 13.04 million MT. Household milk consumption is estimated at 4.15 million MT and industrial milk consumption at 8.9 million MT. The effects of the 2020 pandemic on retail consumption of milk and dairy products in 2021 and 2022 are still unclear. However, in 2021, domestic consumption has stabilized following the pandemic-related drop in 2020.

Consumption for 2022 is forecast at 13.17 million MT, a 1–percent increase. Household milk consumption is forecast at 4.17 million MT and industrial milk consumption at 9 million MT. Social programs (e.g., LICONSA - milk distribution program) to support the poor, retail and institutional reopenings, and growing commercial use are expected to help drive demand.

In Mexico, 77 percent of households have access to and consume fluid milk. However, compared to Canada’s milk consumption of 76 liters per person and the United States’ milk consumption of 68 liters per person, Mexico is the lowest in North America at 62 liters per person. Mexico’s urban consumers are consuming more dairy-based products over milk. Milk producers are increasingly using promotional campaigns to drive milk consumption. Industry sources report growth in consumer uptake of ultra-high temperature (UHT) milk as a result of pandemic lockdowns, which pushed consumers toward packaging with longer shelf life.



Source: CANILEC



Trade - Imports

Imports in 2021 are forecast at 30,000 MT. In 2022, imports are forecast at 29,000 MT, a 3–percent decrease based on sufficient domestic milk production to meet national consumption needs. The Mexican dairy industry estimates it will be able to satisfy national demand with approximately 85 percent domestic milk and 15 percent imported milk. Fluid milk imports mostly reach Mexico’s northeast states and the U.S.–Mexico border region due to logistics and freight costs.

Trade - Exports

In 2021, exports are estimated at 17,000 MT. In 2022, exports are forecast at 15,000 MT, a 12–percent decrease, as domestic milk use is expected to draw from exports. Guatemala and the United States are expected to remain the main export destinations due to geographical proximity.

Cheese

Table 2: DAIRY, CHEESE – PRODUCTION, SUPPLY, AND DISTRIBUTION

| Dairy, Cheese Market Year Begins Mexico | 2020 | | 2021 | | 2022 | |
|---|---------------|----------|---------------|----------|---------------|----------|
| | Jan 2020 | | Jan 2021 | | Jan 2022 | |
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Beginning Stocks (1,000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Production (1,000 MT) | 446 | 446 | 448 | 448 | 0 | 452 |
| Other Imports (1,000 MT) | 114 | 114 | 125 | 123 | 0 | 123 |
| Total Imports (1,000 MT) | 114 | 114 | 125 | 123 | 0 | 123 |
| Total Supply (1,000 MT) | 560 | 560 | 573 | 571 | 0 | 575 |
| Other Exports (1,000 MT) | 11 | 11 | 18 | 12 | 0 | 12 |
| Total Exports (1,000 MT) | 11 | 11 | 18 | 12 | 0 | 12 |
| Human Dom. Consumption (1,000 MT) | 549 | 549 | 555 | 559 | 0 | 563 |
| Other Use, Losses (1,000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Dom. Consumption (1,000 MT) | 549 | 549 | 555 | 559 | 0 | 563 |
| Total Use (1,000 MT) | 560 | 560 | 573 | 571 | 0 | 575 |
| Ending Stocks (1,000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Distribution (1,000 MT) | 560 | 560 | 573 | 571 | 0 | 575 |
| | | | | | | |
| (1,000 MT) | | | | | | |

Production

Production in 2021 is estimated at 448,000 MT and is forecast to reach 452,000 MT in 2022, a 1-percent increase. More and more, milk producers, especially the larger industrialized operations, are looking to vertically integrate, join cooperatives, or create joint ventures. For these producers, key advantages of turning milk into cheese include the added value and extended shelf life from processing milk into cheese.

Jalisco, Chihuahua, Querétaro, San Luis Potosí, Michoacán, and Chiapas States produce most of Mexico's cheese (both industrial and artisan), with soft crust cheeses representing 75 percent of production. Cheese production remains mostly artisanal and small scale, aimed at satisfying regional demand. Some dairies set up their own small processing facilities and sell cheese locally. Industrial cheese operations account for a quarter of all cheese produced in Mexico.

Consumption

Post estimates consumption in 2021 at 559,000 MT, with a 1–percent increase to 563,000 MT in 2022. The slow growth is due to ongoing poor macroeconomic conditions and growing inflation diminishing households purchasing power. One bright spot is the reopening of the hotel, restaurant, and institution (HRI) sector, which has helped drive up consumption.

Mexico’s cheese consumption has room to grow. According to the National Milk Processors Association (CANILEC), Mexico’s per capita consumption for cheese is close to 4 kg per year, considerably lower than the United States at 17 Kg per year or Canada at 14 kg per year. Marketing innovative and ready-to-go cheese products, as well as promoting cheese’s nutritious qualities, could help increase cheese consumption.

Mexico’s 2021 per capita dairy consumption is estimated as follows:

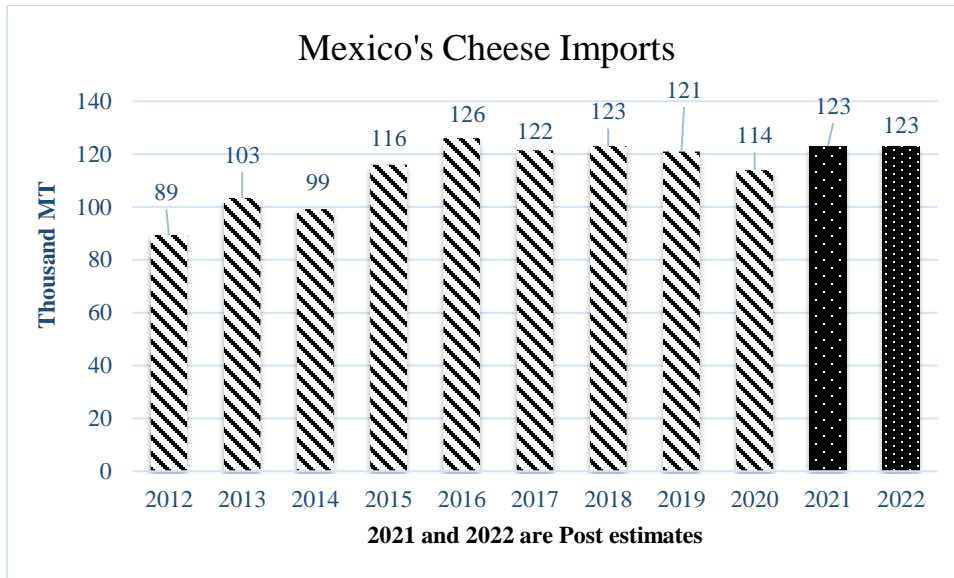
| | |
|--------------|---------------------------|
| Fluid milk | 85 kg/year/person |
| Cheese | 4 kg/year/person |
| Yoghurt | 7 kg/year/person |
| Cream | 1 kg/year/person |
| Butter | 0.5 kg/year/person |
| Others | 29 kg/year/person |
| | |
| Total | 127 kg/year/person |

Source: CANILEC

Trade - Imports

Imports in 2021 are estimated at 123,000 MT and are forecast to remain flat in 2022 at 123,000 MT. Mexico’s economy is not expected to recover to pre-pandemic levels until 2023 or later, negatively affecting its 129 million citizens with growing inflation and unemployment. The HRI sector has helped increase demand for cheese imports, but not enough to counteract the adverse macroeconomic conditions.

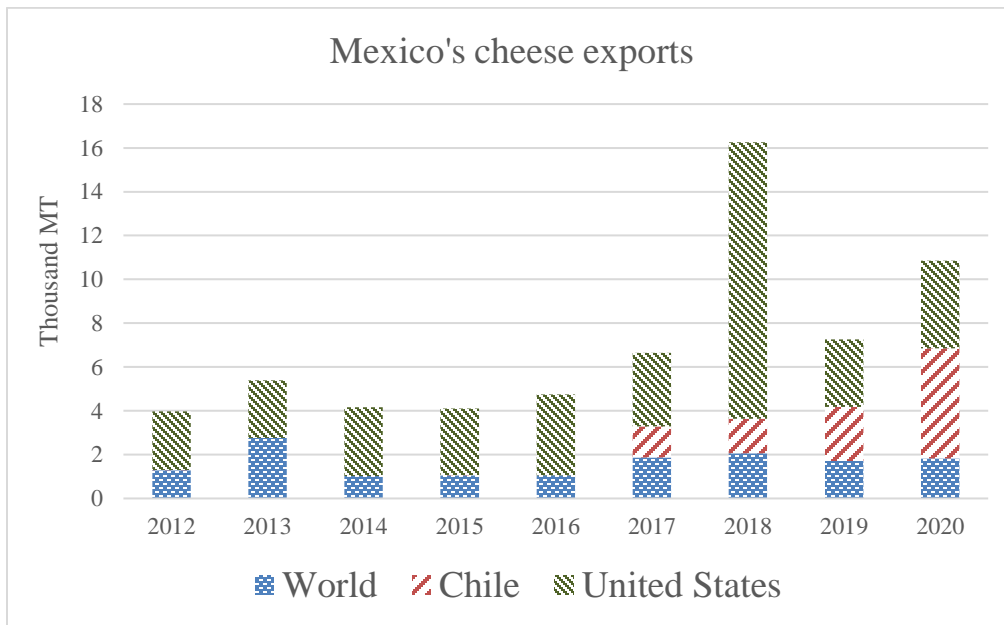
Imported cheeses do not directly reach most consumers; rather, they are used for ingredients in other food products (e.g., pizza). For direct cheese purchases, consumers still rely heavily on local cheeses, which are available at affordable prices. The United States is expected to remain the dominant supplier of cheese exports to Mexico, at 80–percent market share, followed by the Netherlands at 9 percent.



Source: TDM

Trade - Exports

Exports in 2021 are estimated at 12,000 MT and are forecast to remain stable in 2022 at 12,000 MT. Even though exports grew from 2020 to 2021, this trend is not expected into 2022. In 2021, the U.S. economic recovery drove demand for Mexican cheese exports. Chile also saw growth as a cheese export destination due to the presence of Mexican businesses already operating in Chile and the low price point at which they offered cheese.



Source: Trade Data Monitor, LLC

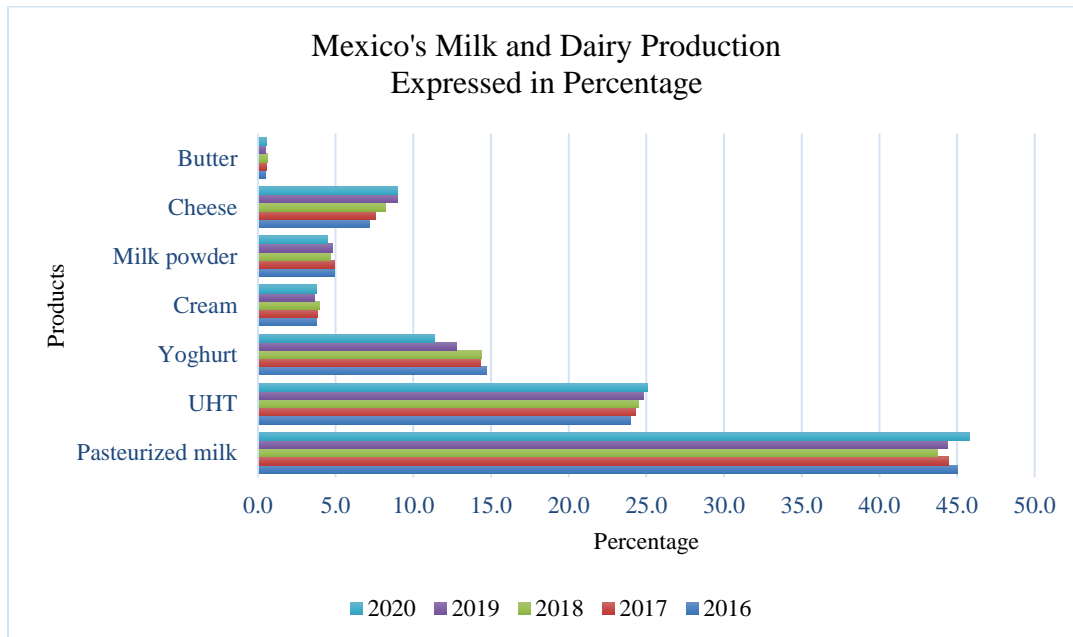
Butter

Table 3: DAIRY, BUTTER – PRODUCTION, SUPPLY, AND DISTRIBUTION

| Dairy, Butter Market Year Begins Mexico | 2020 | | 2021 | | 2022 | |
|---|---------------|----------|---------------|----------|---------------|----------|
| | Jan 2020 | | Jan 2021 | | Jan 2022 | |
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Beginning Stocks (1,000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Production (1,000 MT) | 233 | 233 | 235 | 235 | 0 | 236 |
| Other Imports (1,000 MT) | 42 | 42 | 35 | 28 | 0 | 28 |
| Total Imports (1,000 MT) | 42 | 42 | 35 | 28 | 0 | 28 |
| Total Supply (1,000 MT) | 275 | 275 | 270 | 263 | 0 | 264 |
| Other Exports (1,000 MT) | 9 | 9 | 9 | 2 | 0 | 3 |
| Total Exports (1,000 MT) | 9 | 9 | 9 | 2 | 0 | 3 |
| Domestic Consumption (1,000 MT) | 266 | 266 | 261 | 261 | 0 | 261 |
| Total Use (1,000 MT) | 275 | 275 | 270 | 263 | 0 | 264 |
| Ending Stocks (1,000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Distribution (1,000 MT) | 275 | 275 | 270 | 263 | 0 | 264 |
| (1,000 MT) | | | | | | |

Production

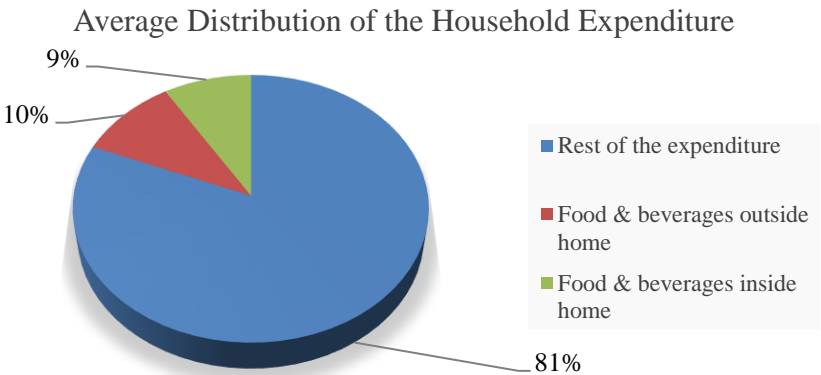
In 2021, production is estimated at 235,000 MT. In 2022, production is forecast basically flat at 236,000 MT. The reopening of the HRI sector and ongoing demand from the industrial bakery and confectionary sectors have helped keep demand steady. Mexico’s large scale butter production is led by three companies, with one major player commanding 70 percent of market share. As with cheese, butter has also been increasingly produced by dairies as a value-added product to sell locally or regionally.



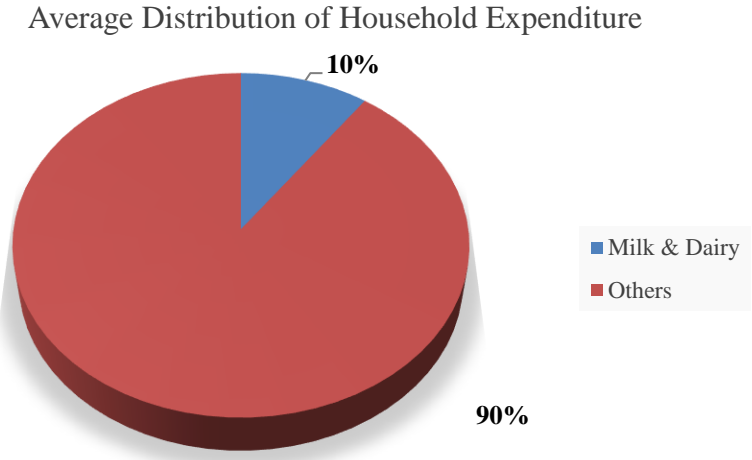
Consumption

In 2021, consumption is estimated at 261,000 MT. In 2022, consumption is forecast at 261,000 MT, remaining flat. Larger, industrial processors in sectors such as HRI, bakery, and confectionary, are driving butter consumption. However, at the household level, consumers are split between butter and plant-based alternatives, such as margarine.

Mexico's per capita consumption is low, at approximately 0.4 kg per year per person. Some of the highest per capita consumption is in countries such as France or New Zealand, at 8.0 kilograms or 5 kilograms, respectively. As macroeconomic conditions remain unfavorable and food inflation steadily rises, butter is becoming increasingly unaffordable for more households.



Source: National Statistics Service (INEGI)



Source: INEGI

Trade - Imports

In 2021, imports are estimated at 28,000 MT. Likewise, 2022 imports are also forecast at 28,000 MT, remaining flat. Domestic production is expected to keep up with slow demand from the HRI and industrial processing sectors. Households which prefer to use butter may seek affordable local alternatives before turning to imported butter. New Zealand is expected to remain as Mexico's top butter provider, with the United States ranked second.

Trade - Exports

In 2021, exports are estimated at 2,000 MT. In 2022, exports are forecast at 3,000 MT, a 50-percent increase to pre-pandemic numbers. There is little butter supply available for Mexico to export, as most of its supply is used in-country.

Nonfat Dry Milk – Skim Milk Powder (SMP)

Table 4: DAIRY, MILK, NONFAT DRY – PRODUCTION, SUPPLY, AND DISTRIBUTION

| Dairy, Milk, Nonfat Dry Market Year Begins Mexico | 2020 | | 2021 | | 2022 | |
|---|---------------|----------|---------------|----------|---------------|----------|
| | Jan 2020 | | Jan 2021 | | Jan 2022 | |
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Beginning Stocks (1,000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Production (1,000 MT) | 45 | 45 | 45 | 45 | 0 | 46 |
| Other Imports (1,000 MT) | 309 | 310 | 350 | 334 | 0 | 340 |
| Total Imports (1,000 MT) | 309 | 310 | 350 | 334 | 0 | 340 |
| Total Supply (1,000 MT) | 354 | 355 | 395 | 379 | 0 | 386 |
| Other Exports (1,000 MT) | 36 | 36 | 45 | 36 | 0 | 38 |
| Total Exports (1,000 MT) | 36 | 36 | 45 | 36 | 0 | 38 |
| Human Dom. Consumption (1,000 MT) | 318 | 319 | 350 | 343 | 0 | 348 |
| Other Use, Losses (1,000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Dom. Consumption (1,000 MT) | 318 | 319 | 350 | 343 | 0 | 348 |
| Total Use (1,000 MT) | 354 | 355 | 395 | 379 | 0 | 386 |
| Ending Stocks (1,000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Distribution (1,000 MT) | 354 | 355 | 395 | 379 | 0 | 386 |
| | | | | | | |
| (1,000 MT) | | | | | | |

Production

Nonfat dry milk, or skim milk powder (SMP) production in 2021 is estimated at 45,000 MT. Production in 2022 is forecast at 46,000 MT. Growth is limited by the existence of only five dehydrating facilities, which are not always working at full capacity. Approximately 80 percent of milk powder imports are from the United States due to the geographical proximity and price. It is cheaper for Mexico to import milk powder than to produce it.

Consumption

Consumption in 2021 is estimated at 343,000 MT and forecast to increase 2 percent to 348,000 MT in 2022. The reopening of the HRI sector has represented growth in demand and consumption, especially for baked goods and desserts offered to guests. Milk powder is a versatile ingredient prominently used in Mexico's food industry. More and more, dairy processors a wider array of products to accommodate consumer needs according to type of families, income, shelf life, and other factors.

Trade - Imports

Imports are estimated at 334,000 MT in 2021 and forecast to increase 2 percent to 340,000 MT in 2022. The reopening of the HRI sector has created growth in demand, which domestic production has not been able to meet, using imports to supplement the limited supply. Social programs, such as the milk distribution program LICONSA, also use milk powder to fortify its milk supply. The United States is the main SMP supplier to Mexico at 99-percent market share.

Trade - Exports

Exports are estimated at 36,000 MT in 2021. Post forecasts exports to increase by 6 percent to 38,000 MT in 2022. Export markets include Latin American countries, to which Mexico may send milk powder as regional aid.

Dry Whole Milk Powder (WMP)

Table 5: DAIRY, DRY WHOLE MILK POWDER – PRODUCTION, SUPPLY, AND DISTRIBUTION

| Dairy, Dry Whole Milk Powder Market Year Begins Mexico | 2020 | | 2021 | | 2022 | |
|--|---------------|----------|---------------|----------|---------------|----------|
| | Jan 2020 | | Jan 2021 | | Jan 2022 | |
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Beginning Stocks (1,000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Production (1,000 MT) | 122 | 122 | 123 | 123 | 0 | 124 |
| Other Imports (1,000 MT) | 3 | 4 | 7 | 7 | 0 | 8 |
| Total Imports (1,000 MT) | 3 | 4 | 7 | 7 | 0 | 8 |
| Total Supply (1,000 MT) | 125 | 126 | 130 | 130 | 0 | 132 |
| Other Exports (1,000 MT) | 20 | 20 | 16 | 18 | 0 | 19 |
| Total Exports (1,000 MT) | 20 | 20 | 16 | 18 | 0 | 19 |
| Human Dom. Consumption (1,000 MT) | 105 | 106 | 114 | 112 | 0 | 113 |
| Other Use, Losses (1,000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Dom. Consumption (1,000 MT) | 105 | 106 | 114 | 112 | 0 | 113 |
| Total Use (1,000 MT) | 125 | 126 | 130 | 130 | 0 | 132 |
| Ending Stocks (1,000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Distribution (1,000 MT) | 125 | 126 | 130 | 130 | 0 | 132 |
| (1,000 MT) | | | | | | |

Production

In 2021, dry whole milk powder (WMP) production is forecast at 123,000 MT. In 2022, production is estimated at 124,000 MT, a 1–percent increase. Production is limited by the availability of dehydrating infrastructure. Mexico benefits from its close proximity to the United States for an affordable and steady supply of WMP.

Consumption

In 2021, consumption is estimated at 112,000 MT. In 2022, consumption is forecast at 113,000 MT, a 1–percent increase. Demand for WMP is driven by industrial dairy processors developing products for consumers seeking dairy products labeled as healthy, fortified, and grab-and-go. According to Nielsen, consumption trends show that as people resumed their regular activities (e.g., work, school, leisure) following the COVID-19 outbreak, retail sales of drinkables and dairy products increased by 17 percent from June 2020 to June 2021. The ongoing reopening of the HRI sector, which uses WMP in confectionary and bakery processes, is also boosting demand through 2021 and in 2022.

Trade - Imports

In 2021, imports are estimated at 7,000 MT. In 2022, imports are forecast at 8,000 MT, a 14–percent increase. Mexico heavily depends on WMP imports to satisfy demand for baby formula, wellness products, fortified products, and others. Price and logistics incentivize imports over domestic production. The United States supplies Mexico with 52 percent of its WMP imports and is on track to retain this market share, followed by Uruguay and New Zealand.

Trade - Exports

In 2021, exports are estimated at 18,000. In 2022, exports are forecast of 19,000 MT, a 6–percent increase. Mexico’s top export markets continue to be Colombia, Cuba, Venezuela, Belize, and Guatemala, which benefit from affordable Mexican prices for the product and its steady availability. However, increasing domestic demand may hinder export growth.

Other Relevant Reports Submitted by FAS Mexico

| | |
|-----------------------------|--|
| MX2021-0051 | Mexico Publishes Draft Conformity Assessment Procedure for Cheese |
| MX2021-0047 | Mexico to Work Six Dairy Regulations and Two Still Pending at the WTO Dairy and Products, WTO Notifications, Trade Policy Monitoring |
| MX2021-0037 | Dairy and Products Semi-annual |
| MX2020-0059 | Dairy and Products Annual |
| MX2020-0056 | Mexico Announces Changes to its Milk Powder Import Procedures Dairy and Products, WTO Notifications, Trade Policy Monitoring |
| MX2020-0024 | Dairy and Products Semi-annual |

FAS Mexico Website: We are available at <https://www.fas.usda.gov/regions/mexico> or readers may visit the FAS headquarters' homepage at www.fas.usda.gov for a complete selection of FAS worldwide agricultural reporting.

Useful Mexican Web Sites: Mexico's equivalent to the U.S. Department of Agriculture (SADER) can be found at www.gob.mx/agricultura, equivalent to the U.S. Department of Commerce (SE) can be found at www.gob.mx/se and equivalent to the U.S. Food and Drug Administration (SALUD) can be found at <https://www.gob.mx/salud>. These websites are mentioned for the readers' convenience but USDA does NOT in any way endorse, guarantee the accuracy of, or necessarily concur with, the information contained on the mentioned sites.

Attachments:

No Attachments