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Report Highlights:

In 2020, Mexico's dynamic retail sector delivered a breakout year for retailer and consumer adoption of digital platforms in response to economic and public health challenges due to the COVID-19 pandemic. Retailers adapted to consumer preferences by pursuing an omnichannel marketing strategy serving customers at multiple Points of Sale and price points. Today Mexico's retailers offer integrated in-store and mobile app-based promotions, innovative store formats in convenient locations, and expanded offerings of versatile, value-oriented, and healthy product choices. According to U.S. Department of Agriculture data, Mexico is the United States' second-largest export market for food and agricultural products following Canada. Due to an uneven economic recovery and an ongoing public health situation, market conditions remain uncertain in Mexico's retail sector for the remainder of 2021.

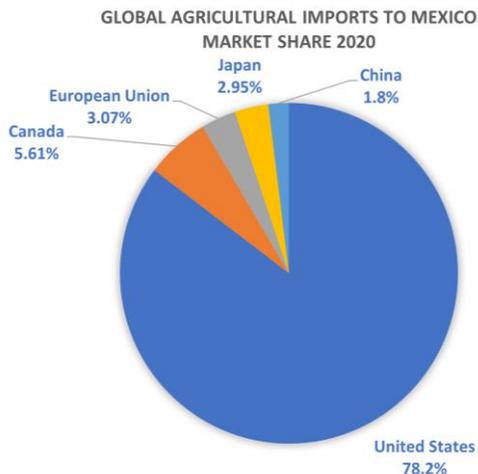
Market Fact Sheet Mexico

Executive Summary

Mexico is the second-largest U.S. trading partner for goods and services. In 2020, U.S. exports of agricultural and related products to Mexico totaled \$18.9 billion, a slight increase of 1.6 percent in comparison to 2019 despite economic headwinds, underscoring the high level of supply chain integration between Mexico and the United States in the agricultural and food processing ingredient sector.

Imports of Consumer-Oriented Products

In 2020, U.S. consumer-oriented exports to Mexico led all other market segments totaling \$8.3 billion, including \$5.9 billion of U.S. processed food exports to Mexico.



Mexico represents the second-largest U.S. export market for consumer-oriented exports.

Retail Industry

Mexico's National Association of Retailers and Department Stores (ANTAD) reports that, in 2020, the Mexican retail sector included 3,435 supermarkets, 2,484 department stores, and 62,377 specialized stores with a majority of sales generated at traditional markets including small mom-and-pop stores and public markets.

Quick Facts

Imports of Consumer Products 2020 (INEGI):

\$45.1 Billion

Mexico's most imported agriculture products (2019):

1. Cereals (22%)
2. Meat (16%)
3. Seeds and oilseeds (12%)
4. Dairy and animal origin products (honey, eggs) (8%)
5. Food residues and animal feed (8%)
6. Food products (6%)

Source: Mexican Ministry of Agriculture (SADER)

Mexico's Top Ten Retailers:

- | | |
|--------------------|---------------|
| 1. Bodega Aurrera* | 6. Soriana* |
| 2. Walmart* | 7. Elektra |
| 3. Liverpool | 8. Superama* |
| 4. Sanborns | 9. Chedraui* |
| 5. OXXO | 10. Suburbia* |

Supermarkets || Source: ANTAD (July 2020)

Products with Potential Growth in Host Market:

Foods across all age groups; organic foods, natural products, healthy products, plant-based products

GDP/Population

Population: 126 million (2020, Mexico Census)

GDP: \$20.8 Trillion (2020)

GDP Real Growth: -8.5% (2020)

Sources: Trade Data Monitor, INEGI 2020 Mexico Census, World Bank

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This report is for informational purposes only, to assist exporters of U.S. food and agricultural products in their sales and promotional efforts in Mexico. U.S. exporters should take normal commercial precautions when dealing with any potential business contract, including checking references.

SECTION I. MARKET OVERVIEW

Mexico continues to be a strong and consistent U.S. export market. In 2020, U.S. agricultural and related exports to Mexico totaled \$18.9 billion, up by 1.6 percent from 2019 despite COVID-19 pandemic-related public health restrictions, highlighting the robust market integration of agricultural products and food processing ingredients between the United States and Mexico¹. According to INEGI, Mexico imported \$20 billion of U.S. agricultural and related products in 2020.

In 2020, in response to the COVID-19 pandemic, the Government of Mexico issued restrictive public health measures, causing widespread disruptions to economic activity across Mexico’s vibrant industrial and service sectors. As a result, Mexico experienced an 8.9-percent decline in economic growth, its worst economic slowdown since 1932, and following a 0.1-percent contraction in 2019. Meanwhile, Mexico’s agricultural sector remained active during the pandemic, and expanding by 2 percent in 2020.

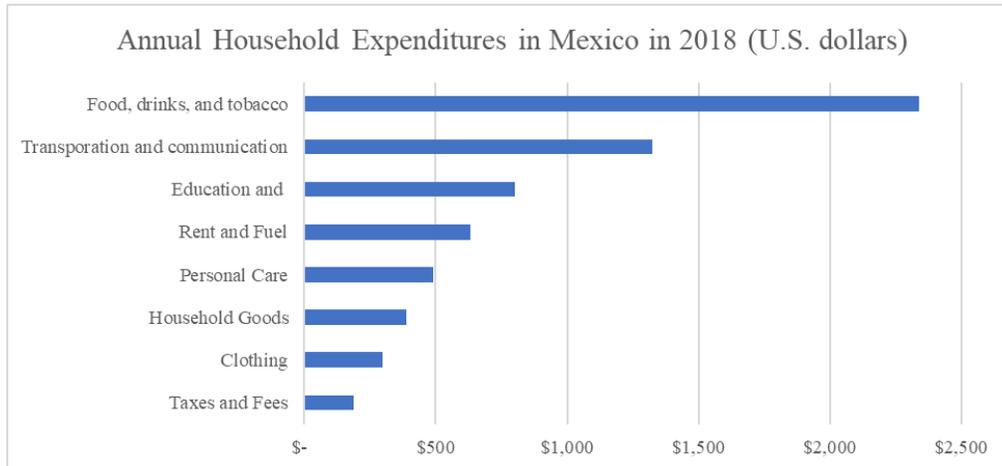
Overall Mexico remains a price-sensitive market. The World Bank classifies Mexico as an upper-middle-income country. According to the OECD, Mexico’s average GDP per capita fell in 2020 to \$19,127, down 3.2 percent from 2019. The 2019 National Household Income and Expenditure Survey (ENIGH, in Spanish) notes that Mexico’s average income is about \$9,951 per year (\$198,432 MXP). According to the World Bank, 53 percent of Mexico’s population lives on less than \$100 per month. The Mexican Market Research Association (AMAI) divides Mexican consumers into six socioeconomic monthly income groups.



Source: AMAI. Note: June 2021 exchange rates averaged \$21.53 Mexican pesos to \$1 U.S. dollar.

¹ Source: USDA, BICO Agricultural and Related products

According to the 2019 Mexico National Household Survey (ENIGH), the average household in Mexico spent \$2,341 per year (\$45,008 MXP), or about 35 percent of overall expenditures, on food, beverage, and tobacco products in 2018.



Source: INEGI, Encuesta Nacional de Ingresos y Gastos de los Hogares (ENIGH) 2018, new series

Mexico Retail Sector Overview and Sales Trends

Retail sales in Mexico including supermarkets, department stores, convenience stores, and specialty stores totaled \$722 billion (\$1.4 trillion Mexican Pesos) in 2019, according to Mexico’s National Association of Retailers and Department Stores (ANTAD).

The report subdivides Mexico’s retail landscape retail into 3,435 supermarkets, 2,484 department stores, and 62,377 specialized stores in 2020.² Mexican shoppers prefer traditional brick-and-mortar vendors, frequenting mom-and-pop stores, and public markets. Additionally, many department stores and specialty stores remained shuttered for much of 2020 and only recently reopened following the relaxation of public health measures in May and June 2021.

Key market drivers and trends

In 2020, the COVID-19 pandemic caused historic shifts across Mexico’s economy rattling household income and agricultural supply chains. Consumers responded to economic hardship and public health concerns by seeking products and shopping channels that offered value, versatility, and convenience. Retailers responded to consumer demands by adopting an omnichannel strategy which offers services at



²Source: [INDICANTAD – ANTAD](#); INEGI and the National Statistical Directory of Economic Units (DENUE), as of December 31, 2020 cited that there are more than 62,018 economic units within Mexico’s retail trade sector.

different points of sale and at every price point. Additionally, retailers in Mexico face aggressive competition as the marketplace continues to mature. Small, independently operated stores are commonly acquired and consolidated into larger retail groups. Retailers must balance strong consumer demand for a broad array of services and narrowing profit margins.

Back to Basics

Among lower- and middle-income consumers, the COVID-19 pandemic led many shoppers to resume habits acquired during the Swine Flu Pandemic and Great Recession of 2009 when Mexico shutdown for two weeks exacerbating a global economic downturn. During this previous experience, consumers avoided crowded supermarkets and public transportation by staying close to home. Lower income earners focused their purchases on essentials in smaller package sizes and private label products. Middle- and higher-income earners purchased bulk and family sized packages by frequenting smaller, “express format” stores. Since 2009, retailers have expanded their neighborhood strategy and continued targeting specific groups setting the entire retail channel up for an omni-channel strategy offering multiple points-of-sale at physical retail channels as well as digital platforms.

Digital platforms: E-Commerce and Social Media

The COVID-19 pandemic spurred a breakout year for digital retail in Mexico, establishing lasting consumer habits. According to Mexican Association of Online Sales (AMVO, its abbreviation in Spanish), e-commerce retailers witnessed a 90-percent increase in usage from April to June 2020, when in the Government of Mexico enforced its most restrictive public health measures. AMVO forecasts that online shopping in Mexico will more than double from 2020 to 2022, reaching a total market valuation of nearly \$18 billion. As the e-commerce channel develops rapidly, major global players are moving into high gear following the 2016 recession by investing in expanded warehouse space and distribution systems, as well as improved customer experiences for home delivery and in-store pick up.

Prior to the confinement, nearly half of all Mexican consumers did not trust online payment systems to due to concerns about fraud. Today, Mexican e-commerce retailers adapted to customer concerns and now offer multiple payment methods including bank deposits, in-person deposits, cash on delivery, and electronic payment services such as Paypal. According to AMVO data, the frequency of weekly purchases among regular e-commerce app users increased from 42 percent in 2019 to 50 percent in 2020. Many consumers aged 45 years and older have adopted e-commerce shopping habits during the extended quarantine period. Additionally, Mexico’s e-commerce retail channel now includes many international players offering food delivery apps like Uber Eats (USA), Rappi (Colombia), and Didi Foods (China), as well as other platforms for apparel and personal care.

Mexico’s Federal Telecommunications Institute (IFT) administered 97 million mobile broadband subscriptions in 2020, which implies an overall market penetration for mobile internet connectivity approaching 75 percent. Additionally, Mexico has about 83 million social network users who spend an average of 3.5 hours on social networks each day. In Mexico, Youtube and Facebook dominate the

social media landscape. Meanwhile, Instagram is one of the fastest growing platforms. The most frequent social media users are students and working-class citizens accessing online content through their smartphones. Although still in its nascent development, Mexico’s social media influencers are distinct from the United States. Mexican consumers respond more favorably to social media marketing campaigns enlisting “nano influencers,” a group of personalities who are recognized as everyday people including housewives, mothers, teachers, or office workers rather than celebrities.

Health and Wellness

Before the COVID-19 pandemic, the Government of Mexico addressed Mexico’s ranking as first in the world in child obesity³ and second in adult obesity by launching a public health campaign addressing obesity, heart disease, high blood pressure, and diabetes. As consumers slowly emerge from a post-COVID-19 world, they are highly motivated to resume their former lives or to improve their overall health and wellness. As a result, there is high consumer interest in food products containing reduced sugar, salt, and carbohydrates, gluten-free and lactose-free formulations, as well as organic, kosher, ketogenic, and natural product categories. Today, premium quality and branded products are no longer limited to high income earners. With widespread interest in health and wellness, younger and middle-class consumers are now willing to pay extra for health and wellness products, such as body care products that claim to reduce stress, boost immune system responsiveness, promote sleep, and weight management or appearance enhancing benefits.

Advantages and Challenges for U.S. Exporters

| Advantages | Challenges |
|--|---|
| Increased awareness in health and body care generates greater demands for healthy products, offering a huge array of U.S. products an advantage. | The Government of Mexico recently implemented a new labeling regulations in 2020, which require that certain products exceeding nutrition thresholds for calories, fats, salts, and sugars display front-of-pack labels, and restrict advertisements and promotions targeting children. |
| Consistent private-public supply chain investments ensure reliable and timely deliveries of perishables, preserving product quality and adding to U.S.-Mexico supply chains connections by land, air, and sea | Although not customary points of sale for relatively expensive U.S. products, lower-end retailers and smaller hotels are the fastest growing segment for Mexico’s hospitality industry. |
| Mexican retailers, hotels, and restaurant chains are familiar with U.S. products and best practices. | Local manufacturers are adapting quickly to meet retail and hospitality industry needs, raising their competitiveness with U.S. products. |

³ Source: UNICEF

| Advantages | Challenges |
|---|--|
| Industry practices are gaining in sophistication to ensure end-to-end cold chain distribution nationwide. | Cold chain distribution remains limited at the “last mile” of delivery and in southern Mexico, where distribution hubs remain underdeveloped. |
| The shared border between the United States and Mexico gives U.S. exporters a competitive logistical advantage over other third country suppliers. | With Mexico’s food distribution network continuing to improve, Mexico’s market becomes attractive for other countries trying to export their products. New third-country FTA’s also add further competition for U.S. products. |

SECTION II. ROAD MAP FOR MARKET ENTRY

Small-to-medium sized potential exporters can work with the appropriate U.S. State Regional Trade Group (SRTG) to take advantage of the SRTG's resources for marketing and promotion support in Mexico. To learn more services available from the SRTGs, find the SRTG for your geographic region in the list below and visit the website.

- Western U.S. Agricultural Trade Association (WUSATA)
- Southern U.S. Trade Association (SUSTA)
- Food Export-Midwest (previously named MIATCO) (Food Export)
- Food Export-Northeast (Previously named Food Export USA) (Food Export)

Many U.S. companies seeking to export to Mexico attend trade shows such as [Expo ANTAD](#) (retail), to gain insight on the Mexican market, establish new contacts, and get to know buyers, potential business partners, importers, and distributors. In addition to recognizing the differences between Mexican and U.S. [business culture](#), it is important for U.S. exporters to consider regional purchasing patterns. Some products might fit perfectly in certain regions, but not in the whole country.

U.S. companies will value working with an experienced and professional importer or distributor as local partner. Distributors or importers will help with issues related to regulations, procedures, labeling, and customs clearance. The main supermarket chains have their own purchasing and importing departments. Companies attempting to approach large chains should have enough production capacity to meet the large product volumes they typically require. We encourage you to check our [Exporter Guide](#) and [Mexico’s Food Processing Ingredients report 2020](#) for a detailed view. In addition, the ATO Mexico City launched a series of educational videos available on the following [website](#).

Additional information on product requirements, labeling issues, and other topics is available via [FAS GAIN](#) system.

SECTION III. COMPETITION

Mexico's retail food sector is a crowded and highly competitive marketplace. A largely self-sufficient domestic market can source about 90 percent of its inputs locally, including fruits, vegetables, and packaging materials. For the remaining 10 percent, the United States is supplier of choice. U.S. agricultural exporters enjoy a sterling reputation in Mexico due to consistent product quality, stable supplies, and proximity. Additionally, preferential market access under the North American Free Trade Agreement (NAFTA) signed in 1994 and its successor agreement the United States-Mexico-Canada Trade Agreement, which entered into force in July 2020, further enhance bilateral trade.

Other major exporters to Mexico include Canada, Ireland, Brazil, Chile, and China. Since joining NAFTA, Mexico has negotiated trade agreements with more than 45 countries. The latest agreements include the new 11-member Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), formally created in March 2018. The agreement entered into force in Canada, Australia, Japan, Mexico, New Zealand, and Singapore on December 30, 2018.

Walmart first entered the Mexican market in 1991 and today operates 2,599 units, of which 2,060 are primarily lower-income format *Mi Bodega Aurrerá* stores, representing their largest revenue base in Mexico. Walmart also operates *Walmart Supercenters*, *Walmart Express* (formerly Superama), and Sam's Club branded channels in Mexico. Walmart operates distribution facilities to process and to distribute imported and domestic merchandise to its physical stores as well as its direct-to-consumer sales on its e-commerce platforms in Mexico. In 2021, Walmart aims to invest 25 percent of their budget to improve inventory management, logistics, and refurbish physical stores and its local e-commerce site: walmart.com.mx. Walmart will also refurbish selected stores.

Soriana operates 795 total stores in 2020. Soriana's formats include 368 *Soriana Hiper* hypermarkets, 125 *Soriana Super*, 163 *Soriana Mercado* (low-income), 105 *Soriana Express*, 34 *City Club* (members-only warehouse club), and in 2020, Soriana began sole operation of 93 Super City convenience stores. Soriana plans to launch an e-commerce platform and open new stores.

Grupo La Comer is the smallest retail chain in Mexico. It operates four store formats: *City Market*, *Fresko*, *La Comer*, and *Sumesa*. *Grupo La Comer's* main target segments are high-income and middle-income consumers. *Sumesa* stores were scheduled to close in 2020, but many continue to operate. La Comer intends to open 6 new stores in 2021 and intends to have 100 units by 2022.

Chedraui operates 321 stores across 25 states in Mexico, covering niche markets ranging from high- to low-income market segments. Their brands include 202 *Tiendas Chedraui* hypermarkets, 64 *Súper Chedraui* (smaller metropolitan areas with less than 25,000 citizens), 11 *Súper Che* express format stores, and *Supercito* express format stores. The company primarily focuses its larger store formats in Southeastern and Central Mexico, including Mexico City. *Chedraui* aims to grow its express format business targeting Mexico's low-to-middle income population. Chedraui also operates a "Select" concept offering organic, kosher, and gourmet products, in addition to traditional grocery items. In 2018, *Chedraui* bought 63 stores from Texan-retailer *Fiesta Mart*. *Chedraui* is the only Mexican retailer with a market presence in the United States (123 stores).

H-E-B, a Texan retailer, has operated in Northern and Central Mexico since 1997. Today, H-E-B is widely accepted in the Northern and Central regions where it operates 71 stores and plans to open 8 additional stores each year.

Supermarkets: Mexico's leading supermarket chains are *Walmart*, *Soriana*, *Chedraui* and *Grupo La Comer*. Regional supermarket chains play an important role as well, such as *Casa Ley* (Pacific Coast), *Merza* (Central), *Calimax* (Baja), *Alsuper* (Northeast), and *H-E-B* (Northeast and Central), among other smaller chains. Overall, more than 100 supermarket chains in Mexico operate approximately 6,482 supermarket outlets according to INEGI's National Statistical Directory of Economic Units (DENUE).

Convenience stores: Prior to 2020, convenience stores offer in one place a wide range of products and services such as fast food, cellphone credit, wire transfers, etc., and their operations are 24/7 which makes them attractive to the consumers. Convenience stores rely on-the-go purchases, as these stores are located at metro stations, avenues, and gas stations. According to Euromonitor, COVID-19 related public health measures caused convenience stores in Mexico to lose about 2 percent in retail sales from 2019. In 2021, convenience stores rely upon to the return of office workers, students, and laborers to workplaces and schools. One of their marketing strategies is to offer more grocery goods, products and sanitizing products to attract consumers. Mexico has a total of thirteen convenience store chains, including Oxxo, 7-Eleven, and Circle K, which compete for Mexico's market. Express Format Stores like Mi Bodega Aurrera (Walmart) or Supercito (Chedraui) offer sundry items and everyday essentials as well as staple foods in a store layout similar to a convenience store. They are typically located in smaller cities or rural areas where major supermarket chains are not available.

Wholesale/Membership-only Warehouse Clubs: Walmart operates approximately 163 Sam's Club outlets in Mexico. Costco operates approximately 39 outlets. Soriana operates approximately 34 City Club outlets. All either currently operate e-commerce websites dedicated to Mexico or are imminently planning to launch e-commerce operations.

E-commerce Retail: 2020 was the year that Mexican consumers adopted digital retail channels as part of their lifestyle. For most Mexican consumers, health concerns, and access to scarce goods drove many consumers to adopt e-commerce purchases. International leaders such as Amazon (USA) and Mercado Libre (Argentina) dominate Mexico's digital retail sector.

Top Imports of Consumer-Oriented Products to Mexico and Global Competition in 2020

| Annual Series: January – December 2020 | | |
|--|-----------------|----------------------|
| Commodity | Partner Country | Value in \$ Millions |
| Dairy Products | World | \$2,099 |
| | United States | \$1,501 |
| | New Zealand | \$221 |
| | Netherlands | \$86 |
| Pork and Pork Products | World | \$1,661 |
| | United States | \$1,451 |
| | Canada | \$187 |
| | Spain | \$19 |
| Poultry and Poultry Products | World | \$1,059 |
| | United States | \$987 |
| | Chile | \$59 |
| | Brazil | \$10 |
| Beef and Beef Products | World | \$886 |
| | United States | \$728 |
| | Canada | \$81 |
| | Nicaragua | \$69 |
| Soup & Other Food Preparations | World | \$852 |
| | United States | \$653 |
| | Guatemala | \$58 |
| | Uruguay | \$33 |

Source: INEGI and Trade Data Monitor

SECTION IV. BEST PRODUCT PROSPECTS

Current U.S. export sales trends indicate that intermediate- and consumer-oriented products will drive future growth. Niches of opportunity continue to appear as Mexico's domestic processing sector diversifies and consumers shift to demand healthy, convenient, and high-quality foods, as indicated by recent consumer habits during the COVID-19 pandemic.

Based on Post assessments, the U.S. food and agricultural products with the highest sales potential are:

- Healthy and environmentally-friendly processed foods (i.e. lower sodium, fat, sugar, etc.)
- Dairy products – functional yogurts, added with probiotics, and lactose-free.
- Plant-based beverages and products – e.g. soy, almond, coconut, rice, oat, beverages/yogurt/pudding/ice cream products.
- Convenience Foods - such as ready-to-eat, meal helpers, and frozen foods.
- Family-size packaging for household and food products

- Pet foods (80 percent of households in Mexico own at least one pet).

Fastest Growing Mexican imports of Consumer-Oriented Products – 2019 and 2020

(Amount in \$ Millions, Growth Rate %)

| Product Category | 2019 Imports from U.S. | 2020 Imports from U.S. |
|-----------------------------------|-------------------------------|-------------------------------|
| Pulses | 114 (-16.9%) | 147 (28.9%) |
| Seafood products | 68 (-9.3%) | 84 (24.3%) |
| Fruit and Vegetable Juices | 28 (-15.4%) | 34 (21.4%) |
| Fresh Vegetables | 210 (39.1%) | 238 (13.6%) |
| Processed Fruits | 167 (6.8%) | 187 (12.2%) |
| Vegetable oils nesoi | 155 (-5.6%) | 172 (11.6%) |
| Eggs and Products | 187 (11.7%) | 207 (10.6%) |
| Processed Vegetables | 313 (0.1%) | 340 (8.5%) |
| Rice | 280 (0.9%) | 294 (5.0%) |
| Tree Nuts | 350 (-7.6%) | 363 (3.6%) |

Source: INEGI and Trade Data Monitor

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

The primary mission of the U.S. Agricultural Trade Offices (ATO) in Mexico City and Monterrey is to assist the market development and promotion of U.S. food and agricultural products in the Mexican market. There are a wide variety of activities and services that the ATOs, along with other private sector representatives called “cooperators,” make available to help develop U.S. agricultural interests in Mexico. If you have any questions or comments regarding this report or need assistance exporting U.S. food and beverage products to Mexico, please contact the ATO in Mexico City or Monterrey.

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MAIN TRADE SHOWS IN MEXICO

| Trade Show | Description | Website |
|------------------------------|--|--------------------------------|
| Expo ANTAD | Trade show organized by the National Retailers and Department Stores Association. Takes place annually in Guadalajara. | Expo ANTAD |
| Expo Café | Trade show related to coffee and coffee shops suppliers. The show has two editions per year: one in Guadalajara and the second one in Mexico City. | Expo Cafe |
| Gourmet Show | Trade show related to gourmet products, including new categories like vegan, organic, wines and spirits and chocolate products. | Gourmet Show |
| Expo Cerveza Mexico | Craft beer trade show. Takes place annually in Mexico City. | Cerveza Mexico |
| Agro Baja | Agricultural and Fishery exhibition. Takes place annually in Mexicali. | Agro Baja |
| Expo Carnes y Lácteos | Beef, Pork, Poultry meat and dairy trade show. The event takes place annually in Monterrey. | Expo Carnes |

ADDITIONAL INFORMATION

FAS/ Mexico Web Site: We are available at: <http://www.mexico-usda.com.mx/> or visit the FAS headquarters' home page at: <http://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 <https://www.gob.mx/agricultura> and Mexico's equivalent to the U.S. Department of Commerce, or Secretaría de Economía (SE) can be found at <https://www.gob.mx/se/>. 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