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Mexico

Product Brief

The Mexican Market for Apples and Pears

2000

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This report is for informational purposes only to assist exporters of U.S. produced food and agricultural products in their sales and promotional efforts in Mexico. The data in this report were collected from local trade and government sources and are not necessarily official U.S. Department of Agriculture (USDA) data. While every effort has been made to provide an accurate list of contacts, telephone and fax numbers change frequently in Mexico. Also, there may be other qualified firms in Mexico and the United States, and their exclusion from any lists or directories is unintentional. Neither the U.S. Agricultural Trade Office nor the USDA endorses any firm contained herein. U.S. exporters should take normal commercial cautions when dealing with any potential importer, including checking credit references.

1. PRODUCT DEFINITION

The products included in this report are fresh apples and pears. Imported dried fruits are not included. These products are included in Chapter Eight of the Mexican Tariff System under sections 08081001 for apples and 08082001 for pears.

2. MARKET SIZE

2.1 APPLES

Production

Mexican production of fresh apples was rather unstable during the 1996-1998 period. Production for 1996, 1997 and 1998 was 428,509, 630,992 and 423,437 tons, respectively. The value of the production for these years was USD \$145.3 million in 1996; USD \$126.7 million in 1997; and approximately USD \$140.0 million in 1998. (See table 1). Production values were calculated according to the average exchange rate of the peso against the dollar for each year: 7.6, 7.9 and 9.2 pesos per one U.S. dollar, respectively.

Mexican apple production consists of Golden, Red Delicious, Rome Beauty, and Dorset Golden varieties, as well as a small quantity of the Starkey variety. The Mexican harvest season is from September to November, although apples are still available in the marketplace through the early months of the following year due to post harvest technology such as refrigeration, controlled atmosphere and/or high vacuum packaging.

Table 1
Mexican Production of Apples 1996-1998
(Tons; Million U.S. Dls.)

	1996	1997	1998
Tons	428,509	630,992	423,437
Value	145.3	126.7	140.0

Source: Secretaria de Agricultura (Secretariat of Agriculture)

Imports

Total Mexican imports of apples increased from \$48.5 million dollars in 1996 to \$62.6 million dollars in 1998, representing an average annual increase of 14.5 percent. During the same period, the volume of these imports represented 89.4 thousand tons in 1996, 115.4 thousand tons in 1997 and 82.4 thousand tons in 1998. See table 2. The varieties imported into Mexico are principally Red

Delicious, Rome Beauty, Granny Smith and Gala.

Mexican statistics on foreign trade are divided into three groups: In-bond imports and exports; definite imports and exports; and temporary imports and exports. This report focuses on the definite imports which are those that are consumed in the domestic market.

U.S. Exports To Mexico

U.S. exports of apples to Mexico decreased from \$47.9 million dollars in 1996 to \$41.0 million dollars in 1998. U.S. apple exports represented 98.82 percent of the Mexican import market in 1996, 99.08 percent in 1997 and 65.45 percent in 1998. The huge drop in the U.S. share of the export market between 1997 and 1998 was the result of the Mexican Government imposing an anti-dumping import duty of 101 percent on U.S. Red and Golden Delicious apples in September, 1997. A suspension agreement was signed in March, 1998 restoring access to the Mexican market. In accordance with this agreement, a minimum price of U.S.\$13.72 per standard 42.lb. carton was fixed for these apple varieties. This has caused the United States to lose market share to Chile. See table 2.

Some of the apple brands found in Mexican retail outlets and public markets include the following: Gilbert Orchards, Red Knight, CMI, Starr Ranch, Stadelman's Apples, Columbia Pride, Skookum, Blue Star, Congdon, Rainier, Jewel, Golden Delicious Apples, Goal Brand Apples, Douglas Fruit Apples, Stemliet, Skookum Chief, Columbia Reach and Burton Fruit.

Foreign Competition

The principal foreign competitors for the Mexican apple market are Canada and Chile. Canada has been able to slowly increase its share of the market from less than one percent in 1996 to 6.4 percent in 1998. Similarly, Chile has also increased its market share from less than one percent in 1996 to a notable 27.7 percent in 1998. This increase in market share was in direct response to the compensatory import duties levied on U.S. apples during this period. See table 2.

Some of the brands of foreign competitors found in the marketplace include: Northern Crisp, Tree Fruits Limited, Fairview Gold, (Canada); Frutam, Frutisol, Alessandri Apples, Clee, Inserfrut, Del Curto, Abbar & Zainy, Dole, Coperfrut, Unifrutti, Univex, Verfrut, Zana, Greenwich and San Clemente (from Chile).

Table 2
MEXICAN IMPORTS
OF APPLES
1995-1998
(Tons; Million U.S. Dls.)

	1996		1997		1998	
	\$	000 Tons	\$	000 Tons	\$	000 Tons
T o t a l M e x i c a n I m p o r t s o f A p p l e s	48.5	89.4	52.4	115.0	62.6	82.4

U.S. Exports to Mexico	47.9	88.4	51.9	114.2	41.0	49.1
U.S. Market Share-%	98.8	98.9	99.1	99.3	65.4	59.6
Exports from Canada	.151	.259	.425	.752	4.0	5.9
Share-%	0.3	0.29	0.8	0.65	6.4	7.2
Exports from Chile	.097	.137	.033	.043	17.3	27.0
Share-%	0.2	0.15	0.06	0.04	27.7	32.8

Source: Banco Nacional de Comercio Exterior (National Bank of Foreign Trade)

Domestic Consumption

Mexican consumption of fresh apples decreased from 518.3 thousand tons in 1996 to 505.8 thousand tons in 1998. Local production continues to represent the principal source of supply, accounting for a steady 82.7 percent and 83.7 percent of the total market in 1996 and 1998, respectively. The Mexican food processing industry utilizes around 40-60 percent of the local harvest for the production of natural and frozen juices and concentrates, cider, puree for baby food, dried fruit, soft drinks, malic acid, yogurts and candies/confectionery. Imports represented a stable share of domestic demand of 17.3 and 16.3 percent in 1996 and 1998, respectively.

Table 3
Mexican Consumption of Apples
(1996-1998)
(Tons)

	1996	1997	1998
Production (1)	428,509	630,992	423,437
Imports (2)	89,829	115,421	82,400
Exports (2)	61	1,059	75
Consumption	518,277	745,354	505,762
Imports as % of consumption	17.3	15.5	16.3

Sources: (1)-Secretaria de Agricultura and own estimates

(2)- Banco Nacional de Comercio Exterior

Mexican Per Capita Consumption

Domestic per capita consumption of apples decreased from 5.56 kgs. (12.32 lbs.) in 1996 to approximately 5.25 kgs. (11.55 lbs.) in 1998. The reason for this decline was that the two sources of supply, production and imports, did not grow at a rate equal to the population. Production fell because of bad weather conditions.

In 1998, Mexico's population was estimated at 96.3 million. It is growing at a rate of 1.88 percent, per year, or about 2.2 million people, annually. Mexico's population should reach 100 million by the year 2000. The population is estimated to be almost equally divided between men (49%) and women (51%),

with life expectancy of 71 years for men and 77 for women. Approximately 61 percent of the population is under 21 years of age.

2.2 PEARS

Production

Mexican production of pears was rather stable and experienced only moderate changes between 1996-98. From 36,487 tons in 1996, local production increased to 37,547 tons in 1997 and decreased slightly to approximately 36,600 tons in 1998. The value for these crops was \$7.9 million dollars in 1996, \$6.5 million dollars in 1997 and \$6.0 million dollars in 1998. Production values were calculated according to the average exchange rate of the peso against the dollar for each respective year (7.6 1996; 7.9 in 1997 and 9.2 pesos per one U.S. dollar, respectively).

Mexican pear production is not highly modernized. Most of the production in Mexico is channeled for regional consumption, with any surplus marketed to the general consumer market. Mexican production consists almost entirely of the Paradise, Parda, Pineapple, San Juan and Keefer varieties. See table 4.

Table 4
Mexican Production of Pears 1996-1998
(Tons; and Million U.S. Dls.)

	1996	1997	1998
Tons	36,487	37,547	36,000
Value	\$7.9	\$6.5	\$6.0

Source: Secretaria de Agricultura y Ganaderia (Secretariat of Agriculture)

Imports

Total Mexican imports of pears increased from \$20.3 million dollars in 1996 to \$34.8 million dollars in 1998, representing an average annual increase of 35.9 percent. During this same period, the volume of imports represented 37.5 thousand tons in 1996, 41.3 thousand tons in 1997 and 51.1 thousand tons in 1998. See table 5. The Anjou, Bosc, Seckel and Bartlett varieties are the most commonly imported pear varieties.

U.S. Exports to Mexico

U.S. exports of fresh pears to Mexico increased from \$20.2 million dollars in 1996 to \$33.8 million dollars in 1998, representing a steady average growth rate of 33.7 percent, annually. The market share for American pears has been stable at 99.42 percent in 1996, 96.58 percent in 1997 and 96.97 percent in 1998. The volume of imports has grown from 37.3 thousand tons in 1996, to 49.8 thousand tons in 1998. See table 5. Some of the American pear brands found in the Mexican retail outlets and public markets include Bosc and Upper River Valley.

Foreign Competition

The principal foreign competitor in this market is Chile, with exports increasing from \$0.114 million dollars in 1996 to \$1.040 millions in 1998. This represents a market share of 0.6 percent and 3.0 percent, respectively. The most common Chilean brand found in the market is Axeas.

Table 5
Mexican Imports of Pears 1996-1998
 (Tons; Million U.S. Dls.)

	1996		1997		1998	
	\$	000 Tons	\$	000 Tons	\$	000 Tons
Total Mexican Imports of Pears	20.3	37.5	23.8	41.3	34.8	51.1
U.S. Exports to Mexico	20.2	37.3	23.0	40.2	33.8	49.8
U.S. Market Share %	99.4	99.5	96.6	97.3	97.0	97.5
Exports from Chile	0.114	0.154	0.804	1.100	1.040	1.300
Chile Share %	0.6	0.4	3.4	2.6	3.0	2.5

Source: Banco Nacional de Comercio Exterior (National Bank of Foreign Trade)

Domestic Consumption

Mexican consumption of fresh pears has increased from 74.0 thousand tons in 1996 to 87.7 thousand tons in 1998. Domestic consumption relies heavily on imports, which have accounted for more than 50 percent of supply in the last three years. In fact, since 1990, with the exception of 1991, imports have represented the principal source of supply to the Mexican market. See table 6.

Table 6
Mexican Consumption of Pears
1996-1998
 (Tons)

	1996	1997	1998
Production (1)	36,487	37,547	36,600
Imports (2)	37,510	41,330	51,100
Exports (2)	32	19	16
Consumption	73,965	78,858	87,684
Imports as % of Consumption	50.7	52.4	58.3

Source: (1) Secretaria de Agricultura and own estimates
 (2) Banco Nacional de Comercio Exterior

The food processing industry utilizes between 60 - 80 percent of the local supply for the production of juices and concentrates, cider, puree for baby food, dried fruit, yogurts, and candies/confectionery.

Mexican Per Capita Consumption

Mexican per capita consumption of pears did not increase significantly over the 1996-1998 period. In 1996, per capita consumption was 0.80 kgs. (1.76 lbs.), increasing only to 0.91 kgs. (2.0 lbs.) in 1998.

3. Domestic Competition

3.1 Apples

There are 23 states that produce apples in Mexico. In 1998, the principal regions for apple production in Mexico were the states of Chihuahua (65 percent of production), Durango (16 percent),

Coahuila (5 percent) and Puebla (5 percent), for a combined total of 91 percent. Cultivated land for apples during the 1996-1998 period was as follows: 71,584 hectares in 1996 (or about 171,801 acres); 67,689 hectares in 1997 (162,453 acres) and 67,288 hectares (166,201 acres) in 1998.

3.2 Pears

There are 21 states that produce pears in Mexico. The principal producing states in 1998 were: Michoacan (46 percent); Puebla (26 percent); Veracruz (7 percent); Chihuahua (6 percent) and Morelos (6 percent). The supply from these five states totaled 91 percent of domestic production. Cultivated land for pears was 4,888 hectares (12,073 acres) in 1996; 5,038 hectares (12,443 acres) in 1997; and 5,000 hectares (12,350 acres) in 1998.

4. IMPORT REQUIREMENTS

Tariffs

Mexican import duties are classified according to the standard international Harmonized System, as established under the provisions of the North America Free Trade Agreement (NAFTA). Chapter eight of the Mexican Tariff System, "Edible Fruits and Nuts, Fresh or Dried," contains the tariffs for apples and pears.

As part of the NAFTA agreement, apples (tariff number 08081001) are included in the 10 year phase-out period, and will reach zero duties in January 1, 2003. Imports are levied a 20 percent duty until that date. Fresh apple imports are subject to an annual quota of 63,759.02 MT. Imports within this quota are subject to a preferential ad-valorem tariff of 14 percent. This quota will be in effect from 1999 through 2003, and is assigned to local importers on a first come, first serve basis by Mexican Customs. Imports above the quota are levied a 20 percent ad-valorem duty. On the other hand, pears (tariff number 08082001) were included in the five year phase-out period and reached zero duties in 1998.

In addition, Mexico has a fifteen percent value-added tax (VAT, or IVA in Spanish). Mexican Customs collect the VAT on foreign transactions upon entry of the merchandise into the country. As of June 1999, Mexican Customs no longer charges a nominal customs processing fee of 0.08 percent. The following example illustrates how these duties are calculated as compared to a locally produced item.

	Imported <u>Products</u>	Domestic <u>Products</u>
F.O.B. Invoice value	\$100.00	\$100.00
Ad-Valorem duty (20 percent)	<u>20.00</u>	<u>N.A.</u>
Sub-total	\$120.00	\$100.00
Value added tax (15 percent)	<u>18.00</u>	<u>15.00</u>
Total	\$138.00	\$115.00

Customs brokers use this total figure to calculate their fees which are, on average, 0.5 percent. The basic Mexican import document is the Pedimento de Importacion (customs entry document), which should be presented to Mexican Customs together with the commercial invoice in Spanish, a bill of lading, packing list, and the Sanitary Import Notice. Products qualifying as "North

American" must use the NAFTA certificate of origin to receive preferential treatment. This is issued by the exporter and does not have to be validated or formalized. Mexican Customs Law is very strict regarding proper submission and preparation of customs documentation. Errors in paperwork can result in fines and even confiscation of merchandise as contraband. Exporters are advised to employ competent, reputable Mexican importers or custom brokers.

Health Certificate and Non-Tariff Requirements

There are certain health requirements that U.S. apple and pear exports to Mexico must comply with. For apples, an international phytosanitary certificate must be issued in the packing area. The certificate must indicate that "The apples of this shipment were treated and inspected under the procedures of the work program agreed between SAGAR (Secretariat of Agriculture-Mexico) and USDA, and were found to be free of quarantine pests." Also, an inspector from Mexico is required to be present during this inspection process. Only U.S. growing areas and packing facilities which have been previously approved by Mexican phytosanitary officials can export apples to Mexico. The work plan for apples mentioned above refers to a cold treatment at 3.3 degrees centigrade (37.94 degrees Fahrenheit) a period of 60 days, or at zero degrees centigrade (32 degrees Fahrenheit) for a period of 45 days. This temperature must be monitored and recorded by a graphic temperature recorder, and the time, duration and temperature must be included in the phytosanitary certificate.

In the case of pears, an international phytosanitary certificate must be issued in the production or packing plant and must include an additional statement to the effect that "The pears in this shipment are free of *Cydia molesta* and *Conotrachelus menuphar*, and were produced in the States of Oregon, Washington or California in areas which are not regulated (quarantined) for fruit flies of quarantine relevance." A maximum of two pea leaves, per box of 25 kgs. (55 lbs.), is accepted.

Labeling

There is not a specific labeling requirement for apples and pears. According to the NOM on labeling, (NOM-051-scfI-1994), published in the Diario Oficial (Official Gazette) on January 24, 1996, products that are shipped in bulk are not subject to labeling requirements. The Mexican Health Ministry has an address on the Internet: [Http://www.ssa.gob.mx/nom/index.html](http://www.ssa.gob.mx/nom/index.html) where more information on these NOMS can be obtained.

5. WHO BUYS IMPORTED PRODUCTS IN MEXICO

The Mexican retail sector is the most significant buyer of apples and pears in Mexico. The organized part of this sector is represented by the large retail chains and convenience stores, which for the most part are well organized, use modern retailing and marketing techniques, and face fierce domestic competition. The leading retail companies are members of the Asociacion Nacional de Tiendas de Autoservicio y Departamentales-ANTAD (National Association of Retail and Department Stores). The other part of this sector is comprised by the "mom and pop stores" which represent the traditional retail system.

ANTAD announced that for 1999, the companies in the sector will invest close to \$1.5 billion dollars in expansion projects. During 1998, total investment was \$1.8 billion dollars, which represented 390 new stores (45 retail) and 35,000 new jobs. According to ANTAD, sales are expected to increase by 8.6 percent during 1999. ANTAD represents the top 100 chains in the sector, of which 45 are in the retail business, 23 are department stores and 32 are classified as specialized stores (sports, gifts, etc.).

In total, ANTAD has 4,466 members of which 1,077 are in the retail business and represent the leading firms in terms of sales and product coverage. At the national level, Cifra, Comercial Mexicana and Gigante are the most important retail chains. At the regional level, Organización Soriana, Grupo Chedraui and Casa Ley are the leading organizations.

The Cifra Wal-Mart group has 410 establishments of which 191 are retail outlets (Bodegas Aurrera, Sam's, Wal-Marts, Aurrera and Superamas). The floor space for Cifra's retail outlets is by far the largest in Mexico with 1.4 billion square meters (12.2 billion square feet). For 1999, Cifra's plans include investments of \$250 million dollars to open 43 new outlets, 15 of which will be retail stores. For the year 2000 an additional 350 million dollars will be channeled in building new stores and increasing floor space by 14 percent, annually. Cifra currently has a 42 percent share of the market and operates in 33 cities. Cifra buys through direct purchasing.

Comercial Mexicana has 189 establishments, of which 154 are retail stores. The retail stores under this group are: Comercial Mexicana, Bodegas, Mega, Sumesa & Price Costco. During 1998, this group invested \$80 million dollars and opened eight outlets of which five were for their retail business. For 1999, Comercial Mexicana will invest another \$80 million dollars to build nine new stores and \$100 million in the year 2000 for 11 new stores. This group has 959.7 thousand square meters of floor space (10.3 million square feet). Comercial Mexicana has 19 percent of the market share and does some of their buying through direct purchasing.

The Gigante Group has 285 outlets, of which 184 are retail stores. The stores in this group include: Tiendas Gigante, Bodegas Gigante and Super G, with 812.4 thousand square meters (8.7 million square feet) of floor space. During 1998, Gigante inaugurated five new retail stores and remodeled 24 others. For 1999, this group will invest \$132 million dollars to remodel 14 retail stores and open three new stores, of which two will be located in the United States in California. Gigante has 16 percent of the market share and buys through direct purchasing.

Among the regional chains, Soriana is the leading organization with 74 outlets, the majority of which are located in the northern and central parts of Mexico. Their plans for 1999 include opening 12 new stores which will add 17.5 percent to their current floor space of 685 thousand square meters (7.4 million square feet). The Soriana group holds 13 percent of the market and buys through direct purchasing.

During the first four months of 1999, ANTAD reported that retail sales increased 4.9 percent, representing almost half the growth of 9.7 percent experienced during the same period of 1998. According to retail analysts, this small increase is due principally to the negative expectations of the economy at the end of last year and beginning of 1999. However, the positive performance of the Mexican economy has also forced analysts to reevaluate their initial projections. They have projected that sales will probably reach 8.6 percent, slightly above the 8.3 percent of 1998, yet below the 9.3 percent expected for the entire sector during 1999.

Table 7
BREAKDOWN OF PRINCIPAL RETAIL UNITS
MEXICO-1999

ORGANIZATION NAME	NUMBER OF UNITS
(National Coverage)	
Gigante	184
Tiendas Gigante	117
Bodegas Gigante	40
Super G	26
Grupo Cifra	191
Bodegas	63
Sam`s	30
Wal-Mart	27
Aurrera	33
Superama	36
Comercial Mexicana	154
Comercial Mexicana	81
Bodegas	26
Megas	14
Price	16
Carrefour	19
Government stores	832
Northern Mexico	
Casa Ley (State of Sinaloa)	80
Soriana (City of Monterrey)	74
Gulf States	
Chedraui (State of Veracruz, Tamaulipas, Quintana Roo)	47
Mexico City	
Sumesa - (Comercial Mexicana)	17
Retail Stores - SUBTOTAL	<u>1,294</u>
Convenience Stores	
Cadena Comercial OXXO	748
Seven Eleven	237
Convenience Stores SUBTOTAL	<u>1,900</u>
GRAND TOTAL	3,239

Source: ANTAD; and own estimates

The traditional "mom and pop stores" (tiendas de abarrotes, ultramarinos & recauderias) represent many small units, approximately 400,000 stores, scattered across the country, and are potentially an important market sector. This is a very fragmented sector for selling fruits and does not currently employ modern marketing or merchandising methods. It will take time for these retail units to incorporate up-to-date retail systems.

6. DISTRIBUTION OF PRODUCT IN MEXICO

The importation of apples and pears into Mexico is done primarily by retailers and wholesalers. Some of the major retailers import directly from the producers and/or through a wholesaler. Retailers try to offer apples and pears to their clients throughout the year. In the months retailers cannot secure apples from their suppliers they will buy from a local wholesaler. The following retail organizations--

(Gigante, Cifra, Comercial Mexicana, Soriana, Casa Ley and 7/Eleven)-- have organized their own distribution centers and are importing directly to some degree.

It is estimated that local wholesalers located in the municipal supply centers control as much as 60-70 percent of supply. These wholesalers represent the traditional distribution systems in this country. Most large cities in Mexico have some kind of Central de Abasto (supply centers). For example, the principal wholesale market in Mexico City is the Central de Abasto. This central food, produce and seafood market, because of its size and concentration, services the entire Mexico City Metropolitan area plus most of the cities in surrounding states. All of their fruit is sold fresh. This is where most of the small and medium sized restaurants, retailers, neighborhood markets, as well as some of the larger establishments, buy their daily fruit supplies. This is a well accepted form of business, and the principal way that small and medium size food establishments procure their fruit. Wholesalers sell both national and imported products.

U.S. firms wishing to penetrate the Mexican market should have a locally based distributor/representative in order to establish a successful business relationship with domestic buyers. In fact, most large retail buyers will require a local distributor in order to start buying.

7. TRADE EVENTS AND SPECIALIZED PUBLICATIONS

Trade events

There are trade events which specifically promote agricultural products in Mexico. Several state and city fairs promote agricultural products and three small events that promote apples specifically are: Expo Feria regional del Queso y la Manzana (Regional Fair of Cheese and Apples) held annually in August in San Bernardo, Durango; contact: Teodulo Herrera, Tel: (52)(152) 60090; Feria de la Manzana (Apple Fair) annually from October to November in Huejotzingo, Puebla; contact: Martha Harrison, Tel & fax: (52)(227) 60003; Feria de la Manzana (Apple Fair) annually in July at Temapache, Veracruz; contact: Pedro Sobrevilla, Tel: (52)(784) 49041, fax: 49090.

There are several major trade events that target the retail/foodservice sectors and provide good opportunities to test the market and contact potential distributors/importers and businessmen. The leading trade show for the retail sector is the ANTAD exhibition which is scheduled annually in March in Guadalajara. This event is organized by the National Association of Retail and Department Stores (Asociacion Nacional de Tiendas de Autoservicio y Departamentales, A.C.-ANTAD), which can be contacted at phone: (011)(525) 580-1772; fax: 395-2610.

The principal exhibition for the foodservice sector is the Resthotel Abastur show, which is held annually in October (October 6-8, 1999) in Mexico City at the World Trade Center. The organizer of this event is Remex, who can be contacted at phone: (011)(525) 237-9988; fax: 657-5926. Another exhibition is EXPHOTEL '99 which is scheduled for June 2,000, in Cancun, which also targets the foodservice sector in Cancun and the Caribbean region, organized by the company Trade Shows which can be contacted phone: (52)(298) 83-3766.

Expo Abasto is the most important exhibition for the principal Centros de Abasto (fruit and produce supply centers) in Mexico, and is scheduled annually in July. In 1999, this event will take place in Expo-Guadalajara from July 15-17; contact: Veronica Gonzalez (011)(52)5649-0070; fax: 5650-

0138;e-mail:conaccadfl.telmex.net.mx; Web:http://www.conacca.org.mx.

The Agricultural Trade Office (ATO) in Mexico organizes a U.S. pavilion at ANTAD and EXPHOTEL to promote business contacts with local distributors and buyers. American firms interested in participating should contact the ATO at: (011)(52) 5280-5291; fax: (52) 5281-6093. Other trade events include Expo de las Americas, which is focused on the HRI sector and is scheduled for February 22-24, 2000, organized by E.J. Krause of Mexico, phone: (011)(52) 5669-2570.

Specialized trade publications

There are several trade magazines related to fruit and agricultural topics that circulate in Mexico. The leading publications are: "Agro-Sintesis," published monthly by Agrosintesis; Tel: (011)(52) 56693125; contact: Ing. F. Gonzalez Iñigo; "2000 Agro," published quarterly by Publicaciones Sayrols, S.A., Tel & Fax: (011)52 56603533, E-mail: teorema@adf1.telmex.net.mx; contact: Wendy Coss; "Enlace," published monthly by ASIA, Tel: (011) 52 5610-2533 Fax: (011) 52-55492483; contact: Marcel Morales; "Al Grano," published quarterly by ASTECA, Tel (011)43 144514 & Fax: (011)43 144698; contact: Luis M. Zuarth; "CPM," published bi-monthly by United Agri Products <http://www.crop-net.com>; contact: Jeffry Powell. The leading buyer's guide in the industry is "Directorio de la Comercializacion de las Hortalizas y Frutas Mexicanas," published annually by the Union Nacional de Organismos de Productores de Hortalizas y Frutas; Tel: (011)(52) 40225 Fax: 40626; Contact: Ing. Mario Robles Escalante.

The principal specialty magazines for the retail sector are: "Cadenas," published monthly by ANTAD Tel: (011)(52) 5580-1772; fax: 5395-2610; and "Abarrotes y Mas," published bi-monthly by Servialimentos Publishing, Tel: (011) (52) 5514 8020 & Fax: 208 7864; Contact: Gerard Delaney, Manager.

8. KEY TRADE CONTACTS

As of February 1999, a number five was added to telephone numbers in the Mexico City area. However, for long distance calls from the United States this additional five is not dialed.

Firm/institution/agency	Contact	Address	Phone/fax/internet
U.S. Embassy Agricultural Trade Office- ATO USDA	Chad R. Russell Director	Jaime Balmes 8-201 Col. Los Morales Polanco. Mexico 11510 Mexico D.F.	Phone: (011)(525)2805291 280-5277, 281-6586 Fax: (525) 281-6093
Northwest Pear Bureau	Herb Diede, President	4382 SE International Way Milwaukee, OR 97222-4635 Mailing address: P.O. Box 22026 Milwaukee, OR 97269-2026	Phone:(503) 652 9720 Fax: (503) 652 9721 Email: Kmoftitus @apears.comm Homepage: http://www.usapears.com
Grupo P.M., S.A. de	Luis Moreno		Tel: (52)73262952 &

C.V. Mexican representative for the Northwest Pear Bureau:			73262957 Fax: (52) 73 26 2962 Email:74173.352@compuserve.com.
Washington State Apple Commission	H. Terry Elwell, Export Director International	2900 Euclid Av. Wenatchee, WA 98807 Mailing Address: P.O. Box 18 Wenatchee, WA 98807	Ph: (509) 663-9600 Fax: (509)662-5824 Email:WSJensen@compuserve.com Homepage:http://www.bestapples.com
U.S. Apple Association	Kraig Naasz, President	6707 Old Dominion Dr. Suite 320 McLean VA, 22101-4556	Ph: (703) 556-9300 Fax: (703) 556-9301 Email:Pkimball@Kimball.com
Animal & Plant Health Inspection Service-APHIS; USDA		Sierra Nevada 115 Mexico D.F. 01100 Mexico	Phone: (011)(525) 5204444 Fax: (525)
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