

trimmings. The middle classes favor very flat cuts from the medium tender cuts called bistec and milanesa, which are only available in Mexico. The high classes favor the tender cuts, such as ribs and tenderloin and special cuts, such as the "American cuts". It is important to note that 77% of the beef consumed in Mexico is of Spanish type cuts, 22% of American type cuts and 1% of offals and processed meat. At the household level, an even greater proportion of Spanish cuts is used, since American cuts are practically unavailable at the retail level, since they are not carried by supermarkets and only by top quality butchers. American cuts are mostly consumed by hotels and restaurants.

The Spanish cut is much leaner than the American cut because the animal is usually fattened on pastures, not on grain. On the other hand, the cuts are quite different from the American cuts since they eliminate both fat and bone; are made with different instruments (knife rather than saw) and are more labor intensive; and the carcass is initially cut at different points. For Canadian exporters this is important to note, since many potential customers in Mexico, such as supermarket chains, will require the carcass to be cut the Spanish way rather than the American way. Since, on the other hand, transportation costs for carcasses are higher than those for retail cuts due to their lower volume, it would be important for the Canadian exporter to send someone to Mexico to learn how to cut the usual way in Mexico.

3.2.2 PORK

The total inventory of pork is estimated by SARH at 17.3 million head in 1990. After an all time high of 19.4 million head in 1984, pork production dropped to 15.9 million in 1988 and has steadily increased since, as a result of per capita income growth. The total inventory of pork is primarily located in the states of Jalisco (12.1%), Mexico (10.8%), Michoacán (10.8%), Chiapas (8.2%), Veracruz (8%) and Sonora (7.4%), although all states have some production, in particular those located in the Center, South and Gulf zones. The Northern states are stronger in the production of beef.

Pork is raised in three very distinct production systems: highly "technified", semi-"technified" and family units. All of these together are estimated to generate 300 direct jobs and 100 indirect jobs.

Approximately 32% of pork is produced by the technified sector, in specialized sites and under strict control in all areas. In this sector, reproduction techniques and genetics play an important role, although artificial insemination is still uncommon in Mexico. High quality breeding animals are generally imported, mostly from the United States (85%) and Canada (15%) and the breeds most common are Yorkshire, Duroc, Hampshire, Spotted and Landrace. Productivity is significantly higher in the "technified" sector: the fertility rate is of 21 offspring per