

incorporated into the production, such as better feed and sanitary conditions, which have allowed for increased quality and quantity of meat.

There are approximately 56 slaughterhouses for poultry, 18 municipal and 38 private. The majority of them are concentrated in the states of Mexico and Guanajuato and close to the producing centers rather than to the consumption centers. There are also 4 TIF plants in Sonora, Durango, Aguascalientes and Jalisco, with a total capacity of some 150,000 head per shift and a freezing and refrigeration capacity of 1.5 million carcasses. These plants are presently utilized beyond their capacity and account for 8% of the volume sacrificed. These plants are also the only ones capable of processing meat for export. Finally are the small in-situ operations, which sacrifice animals for internal consumption directly at the family operation under very poor sanitary conditions.

The distribution process of chicken has less intermediaries than that of other meat products. This is also due to the integration of the large farms, which have their own slaughterhouses and directly supply their large clients. Since they are also price-setters, other firms have to compete with these prices and have to eliminate intermediaries. Following is a chart of the distribution process for the technified sector production.

PRODUCER

Intermediaries

Slaughterhouse

Storage

Industrialization

Wholesalers

Supermarkets

Retailers

Broilers

Restaurants

Markets

CONSUMER

Source: SARH

The introducer purchases the chicken at the farm and transports the animals to the slaughterhouse, although some producers directly supply at the slaughterhouse using their own transportation. Some large companies also sell one day old chicken to smaller farms which fatten them with feed, pharmaceuticals and other inputs provided by the large chicken producer and later sell the fattened birds back to the initial producer, who then either slaughters them or takes them (performing the function of an introducer) to a slaughterhouse. Approximately 20% of total production is made by fully integrated firms with their own slaughter facilities.

Chicken is essentially used for direct human consumption, although some waste is used for animal feed. The industrial