

- there is a shortage of adequate refrigerated storage. In particular, there is a lack of Thermokeen units; and
- there is a lack of loading and unloading infrastructure at the distribution level.

Production innovations are considered unusual. In the sausage industry, *Zwanenberg* recently developed a pepperoni sausage product presented in individual portions, targeted at children – but this is a rare exception.

FOREIGN TRADE

In 1994, Mexico imported one-quarter of all its pork requirements. Canada's share is about 14 percent of imports and more than 3 percent of consumption.

Mexico's pork imports for 1994 have been estimated by the *Comisión Nacional de Porcicultores (CONAPOR)*, National Commission of Pork Producers, at 221,404 tonnes or about 22 percent of the market. According to official government data, imports in 1994 had a value of US \$257 million. This was a 34 percent increase, from the previous year, driven mainly by a 42 percent rise in imports from the United States. Import penetration for 1994 was estimated by CONAPOR at 24 percent by volume.

More than 30 percent of Mexican imports consist of offal. Carcasses and other unprocessed meat make up almost 30 percent and live animals about 8 percent of the total. The balance consists mostly of processed pork, including sausages, bacon, hams and other value-added products.

Most unprocessed imported products have little value-added and are cheaper than competing Mexican products. On the other hand, value-added products enjoy more prestige than the equivalent Mexican products. Mexicans are very brand-conscious and are willing to pay extra for prestige brands.

MEXICAN PORK IMPORTS US \$ MILLIONS

	1992	1993	1994
Live swine for breeding	12.3	6.5	8.0
Live swine for meat	7.8	1.8	12.4
Carcasses and half-carcasses, fresh	11.5	10.2	17.6
Carcasses and half-carcasses, frozen	2.5	2.7	0.3
Hams, shoulders and cuts thereof, bone-in, fresh	26.7	21.1	31.1
Hams, shoulders and cuts thereof, bone-in, frozen	13.0	8.0	9.9

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