

Production in this category is dominated by four major firms that claim more than three-quarters of the total market.

There is a rising demand for processed meat products as a result of population growth and changing consumption patterns. Consumption was estimated by the U.S. Department of Commerce at about US \$600 million in 1994.

Imports are not growing as quickly as in some other food subsectors. Canada's 1994 exports of processed meats to Mexico were only US \$2.4 million. About 49 percent of this was pork products and another 28 percent was poultry. In spite of the lackluster export performance, Mexican meat proces-

### Major Private Supermarket Chains

Chain	Number of Stores
<b>CIFRA</b>	
CIFRA	50
Aurrera	35
Superama	38
Sam's Club	20
Wal-Mart	12
<b>GIGANTE</b>	
Gigante	156
Bodega Gigante	34
Super G, Carrefour	9
<b>Comercial Mexicana</b>	
Price Club	17
Mega	2
Bodega	27
Sumesa	17
K Mart	4
De Todo	2
Soñana	48
Automercado	14
Grupo Zaragoza	32
Casa Ley	55
<b>CALIMAX</b>	32
San Francisco Asis	22
Comercial V.H.	17
Almacenes Coppel	14
Super Mercado Modemo	13
Azcunaga	9
Super Maz	6
Las Nuevas Fábricas	7
Casa Cholita	7
Chedraui	25

Note: Excludes about 400 government-owned stores operated by IMSS and ISSSTE.

Source: Canadian Embassy in Mexico.

### Processed Food Consumption in Mexico, 1992-1993 US \$ '000s

	1992	1993	Percentage change
Milk, packaged	371,874.6	375,479.0	1.0
Milk, concentrated	59,402.3	80,702.5	35.9
Yoghurt	141,589.0	164,803.0	16.4
Butter	56,961.1	76,455.0	34.2
Cheese	232,726.8	239,559.0	2.9
Ice cream	169,255.8	219,171.0	29.5
Processed fish	148,912.6	184,341.5	23.8
Processed meat	520,787.2	558,971.0	7.3
Vegetables, frozen	89,510.3	127,425.0	42.4
Vegetables, dried	25,225.6	26,334.5	4.4
Vegetables, prepared	686,788.2	705,085.0	2.7
Fruits, frozen	7,323.6	9,344.5	27.6
Fruits, dried	148,912.6	161,405.0	8.4
Fruits, prepared	160,304.8	165,652.5	3.3
Juices	137,520.4	162,254.5	18.0
Nuts, mixed	309,217.4	298,174.5	-3.6
Nuts, prepared	59,402.3	73,057.0	23.0
Coffee and tea	70,794.5	62,013.5	-12.4
Coffee and tea extracts	16,274.6	18,689.0	14.8
Spices	144,843.9	156,308.0	7.9
Vegetable fats	289,687.9	295,526.0	2.0
Sugar and maple syrup	2,441.2	5,097.0	108.8
Confectionery	596,464.1	588,703.5	-1.3
Cocoa	197,736.4	227,666.0	15.1
Chocolate, canned	67,539.6	76,455.0	13.2
Chocolate bars	1,012,280.1	976,925.0	-3.5
Baby foods	26,853.1	27,184.0	1.2
Flour for pastry	111,481.0	137,619.0	23.4
Diet products	67,539.6	98,542.0	45.9
Pasta	53,706.2	54,368.0	1.2
Cereals	289,687.9	309,218.0	6.7
Bread and cookies	478,473.3	466,375.5	-2.5
Sauces, mustard	422,325.9	410,308.5	-2.8
Soups	255,511.2	275,238.0	7.7
Other	760,023.8	736,516.5	-3.1
<b>Total</b>	<b>8,189,378.9</b>	<b>8,550,967.0</b>	<b>4.4</b>

Source: U.S. Department of Commerce, International Trade Administration.

sors with capital to invest are developing new consumer-ready lines which have been posting healthy growth rates. This suggests opportunities for joint ventures between Canadian and Mexican producers.

Traditionally, Mexicans have purchased cold cuts at the local market where they can see them being trimmed for sale. Changing lifestyles have left Mexican households with less time to shop, and prepackaged products are gaining in popularity. Increased nutritional awareness is also driving sales of lean cold cuts and processed meats

made of turkey or chicken. Every supermarket now has a well-stocked deli counter with meat loaf and packaged meats. Deli cases are also appearing in the fast growing convenience store sector and even in "mom-and-pop" stores around the country.

### PROCESSED SEAFOOD

Mexicans are important consumers of processed seafood, particularly canned fish. The most popular products are canned sardines and tuna, but shrimp,