Agricultural Technology, Machinery and Equipment

THE OPPORTUNITY

Mexico's agriculture sector is badly underdeveloped. Government programs to modernize it are likely to create important long-run opportunities for Canadian suppliers of agriculture technology, machinery and equipment.

- Only about 20 percent of Mexican farms are efficient enough to compete in foreign markets. Average farm size is less than 5 hectares.
- When Mexico joined the North American Free Trade Agreement (NAFTA) in 1994, three-quarters of its agricultural machinery was considered obsolete.
- Experts say that Mexico requires a minimum of 60,000 tractors to replace obsolete machines.
- It is estimated that farmers who buy tractors spend about 40 percent more on basic implements.
- Livestock and poultry producers are already partly mechanized and represent a large market for imported equipment.

Canada has so far captured only a small share of this market, but new opportunities will emerge as farms are aggregated under Mexico's program of agrarian reforms.

MEXICO'S AGRICULTURAL REVOLUTION

The Mexican agricultural sector is in the midst of a massive revolution. But by all accounts, it has not been a very successful revolution. Policy reforms designed to modernize and restructure the sector have so far failed to take hold. Agricultural production fell by 32 percent in 1995. During the 1996 spring planting, two million hectares were taken out of production. And according to the *Confederación Nacional Ganadera (CNG)*, National Cattle Ranchers Association, Mexico's cattle herds declined by almost half during 1995.

These outcomes were partly the result of short-run problems. An extended drought continued to devastate northeastern Mexico during 1995. And the devaluation of the peso in December 1994 doubled the peso prices of imported inputs.

The agricultural sector has always been a source of difficulties for the Mexican government. After the revolution, which began in 1910, there was a massive redistribution of land, as the nation's huge

SUMMARY REPORT

In addition to this market summary, the Department of Foreign Affairs and International Trade (DFAIT) has prepared a market profile entitled ***Opportunities in Mexico: Agricultural Technology, Machinery and Equipment***. This market information on Mexican agricultural technology, machinery and equipment has been produced and published by Prospectus Inc. under contract with DFAIT, along with other market profiles and summaries on business opportunities in Mexico. It is available from:

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Department of Foreign Affairs and International Trade / Ministère des Affaires étrangères et du Commerce international *haciendas*, farms, were broken up. This land was redistributed to the peasants in the form of *ejidos*, communal land holdings. About 90 percent of Mexican farmers work plots smaller than 5 hectares, and 40 percent have less than 1 hectare.

Policies implemented after the revolution further promoted inefficiency. Since the *ejidatarios*, as the holders of *ejidos* are known, did not have title to the land, they had little incentive to invest and could not sell, rent or combine their holdings. In the decades that followed, government policies focussed on subsidizing the sector to keep people in the countryside and to provide the industrial centres with a reliable supply of domestically produced food. As a result, Mexico's agricultural sector employs almost one-quarter of its active labour force to produce less than 9 percent of gross domestic product (GDP). In contrast, Canada's agricultural sector employs 3.6 percent of its active labour force to produce 2.3 percent of GDP.

Two major changes were implemented by the Salinas administration. In late 1991, Article 27 of the Mexican constitution was amended to give holders of *ejidos* title to their land. Then, in October 1993, the government implemented the *Programa de Apoyos Directos al Campo (Procampo)*, which replaced commodity price supports with direct grants for each hectare planted. The objective of both of these changes was to reorganize the agricultural sector according to market principles.

In October 1995, the Zedillo administration unveiled an expanded rural support program called *Alianza para el Campo*, Rural Alliance. It continues *Procampo* and expands it to include livestock producers for the first time. It provides subsidies for new technology and decentralizes the administration of farm programs. Combined with the gradual recovery of the Mexican economy, *Alianza para el Campo* is expected to create substantial new opportunities for foreign suppliers of agricultural technology, machinery and equipment over the medium term.

THE AGRICULTURAL SECTOR

Mexico's agricultural sector has two major components. Small, labour-intensive farms cater to the domestic market. These operations include about 28,000 *ejidos*, communal properties, which account for about half of Mexico's total land area. About 3 million *ejidatarios* work this land. There are also about 3 million small private landowners engaged in agriculture. Small farmers in both categories are known as *campesinos*, country people. About 90 percent of them have less than 5 hectares of land providing little more than subsistence for their own families. These farms coexist with a much smaller number of large-scale, highly mechanized and technologically-advanced operations. These are often linked to multinational corporations either by direct investment, or indirectly though purchasing and financing agreements. The large farms are responsible for most of Mexico's agricultural exports. Only about 20 percent of all Mexican farms are efficient enough to compete in the external market. Mexico's leading exports are fresh fruits and vegetables, nuts, and plantation crops such as coffee and sugar.

Mexico has about 18 million hectares of cultivated land. Crop production varies greatly between regions, depending mostly on rainfall conditions. About one-third of the cultivated area is irrigated. There are six major crops: corn, beans, wheat, sugar cane, coffee and sorghum. Corn and beans are Mexico's traditional staples and they account for about half of all cultivated land.

Conditions for livestock production are found throughout Mexico. Livestock production is much better developed than farming, and there are many vertically-integrated companies that service both the domestic and international markets.

THE AGRICULTURAL TECHNOLOGY, MACHINERY AND EQUIPMENT MARKET

According to some estimates, about three-quarters of all Mexican agricultural equipment was obsolete when Mexico joined the North American Free Trade Agreement (NAFTA) on 1 January 1994. The need for farmers to modernize and adapt to liberalized trade might have been expected to create a large demand for imported technologies. But this has been prevented, for the most part, by the depressed state of the agricultural sector, especially since the devaluation of the peso in December 1994. Real agricultural GDP fell by 15 percent in 1995.

The combination of poor productivity and extremely scarce capital has severely depressed sales of imported agricultural equipment and services. According to estimates by the US Department of Commerce, the Mexican market for agricultural machinery and equipment was worth about US $480 million in 1994. Mexican producers supply more than half of the market, mostly concentrating on tractors and implements. More sophisticated equipment is almost entirely imported. The United States claims about 90 percent of the import market, estimated at about US $200 million in 1994.

There is a small market for agricultural services. Mexico has inadequate resources to conduct agricultural research and to disseminate information to farmers. The *Secretaría de Agricultura, Ganadería y Desarrollo Rural (Sagar)*, Secretariat of Agriculture, Livestock and Rural Development, operates almost 1,000 support centres throughout the country. But budgets have been cut as a result of the economic crisis, and new cost-effective approaches are needed.

There is no reliable data on domestic production of specific types of agricultural equipment. Industry observers maintain that tractor sales provide a good indication of the overall state of the market. Farmers are believed to eventually purchase implements worth about 40 percent of the value of their tractors. Tractors are also used by livestock producers, especially since most of them also grow feed.

Tractors are used to cultivate only about half of all sown land in Mexico. Experts say that Mexico requires a minimum of 60,000 tractors to replace obsolete machines and double that number to become fully mechanized. And 20,000 units per year would be needed for normal replacements. Actual sales, however, were only 10,000 units in 1994, falling to 3,800 the following year, in response to the economic crisis.

FOREIGN TRADE

Mexico's imports of agricultural equipment increased by 57 percent to reach US $201 million in 1994, the first year of the North American Free Trade Agreement (NAFTA). The gain was broadly based but the largest increases were for cultivation equipment, harvesting equipment, and for dairy and poultry production. Reductions were posted for equipment related to primary food processing.

The economic crisis of 1995 had a devastating effect on the market. Imports fell to US $90 million, almost 30 percent lower than the pre-NAFTA level of 1993. Products that escaped the crisis were mainly those used for primary processing. This reflects the fact that the products that benefitted most from the devaluation generally require some form of cleaning, sorting or processing.

The United States accounted for about three-quarters of the import market in 1994. Canada's share is very small, but gradually improving. The overall market share for Canada more than doubled from about half of one percent in 1993 to about 1.2 percent in 1994, the first year of NAFTA.

CUSTOMERS

The vast majority of Mexican farmers operates at a subsistence level, using labour-intensive techniques, and are not considered good prospects for sales of imported equipment and services. The larger corporate farms are the principal customers for advanced technologies. Corporations have traditionally been the main vehicle for avoiding the 100-hectare constitutional limit on the size of private land holdings. They include some large Mexican companies, but many large agricultural operations are tied to multinational enterprises with locked-in lines of supply.

The most promising customers, for suppliers that are new to the Mexican market, are operators of newly assembled larger farms. This category is expected to grow gradually as land holdings are aggregated under Mexico's land reforms. Modernization is typically part of such projects. Among existing operations, livestock and poultry producers are considered better prospects than crop producers.

The constitutional amendment that enabled the assembly of larger farms became effective in late 1991, but most observers believe that real change will take many years. Access to capital has long been the most serious obstacle to farm mechanization. The new law allows *ejidos*, communal properties, to "associate" with private investors, including foreign investors. The government is supporting the creation of *agroasociaciones*, agricultural joint ventures, through the *Fondo de Capitalización e Inversión del Sector Rural (Focir)*, Rural Capitalization and Investment Fund.

COMPETITORS

Domestic manufacturers of machinery for crop production concentrate mainly on tractors and basic implements. They supply about half the market. Mexican companies also claim about half the market for equipment for raising livestock. Multinational enterprises dominate local production, and they import more sophisticated equipment.

DOMESTIC COMPETITORS

The two most important manufacturers are New Holland and John Deere, each of which controls roughly 40 percent of the agricultural equipment market. Massey-Ferguson produces in Mexico through a joint venture with the state-owned company *Tractores Sidena*, which operates under the Massey-Ferguson name. The remaining domestic producer is *Universal Tractores de México*.

Many foreign companies have subsidiaries or joint ventures in Mexico to manufacture or distribute equipment for raising livestock, producing milk and eggs, and for primary food processing.

Foreign Competitors

American suppliers accounted for about three-quarters of the import market in 1994, with an even higher share in some product markets. The US share fell to about two-thirds in 1995, however, because American products were disproportionately hurt by the economic crisis. Equipment manufactured by Case International is actively promoted by Mexican distributors. Caterpillar has developed close relations with the major regional distributors of heavy machinery in Mexico and its leasing operation is well established. But it has focussed on equipment for the construction and mining industries.

Japan has increased its profile in Mexico with a technical assistance program. Since Japanese producers specialize in equipment for small- to medium-sized farms, they are expected to be an important competitor in the future.

Since the advent of the North American Free Trade Agreement (NAFTA), Canadian producers have increased their market share from about 0.5 percent in 1993 to about 1.5 percent in 1995. Sales in 1994 were about US $2.4 million, but fell to half that level in 1995. Tractors accounted for more than 40 percent of 1995 sales. Combines, threshing machinery, and milking machinery are other areas of relative strength. According to some reports, Canadian companies are considering entering the market for used equipment which has so far not been developed in Mexico.

Trends and Opportunities

The Economic Crisis

Mexico entered 1995 in the midst of serious economic crisis. The peso was sharply devaluated during the last week of 1994, and by mid-January it stood at roughly half of its former value relative to the US dollar. As a result, imports were sharply cut and Mexico registered its first agricultural trade surplus since 1987. Unfortunately, most of the agriculture sector was not able to increase production sufficiently to take advantage of the export boom fueled by the cheap peso. Exports of fresh fruits and vegetables increased by 40 percent and 46 percent respectively. Coffee exports doubled. But more than 80 percent of the cultivated area is planted in grains and oilseeds, which are not, in general, internationally competitive. Overall, agricultural GDP fell by 15 percent during 1995, compared with 10 percent for the overall economy.

Drought

Much of Mexico has suffered from a severe drought now in its fifth year. The northern states of Chihuahua, Tamaulipas, Nuevo León, Durango, Sinaloa, Zacatecas, Jalisco and Coahuila have suffered the most and by June 1996 had received emergency funds totaling $1.5 billion Mexican pesos. Northern Mexico normally has a dry climate, but precipitation was 40 percent lower than normal in 1995. The crops most heavily affected by the drought are beans, wheat and other grains. Livestock production has also been devastated.

Product and Service Opportunities

Field Equipment

The best opportunities are in equipment used for export-oriented production. This includes implements for the cultivation of tomatoes, fresh fruits and vegetables, tobacco and cotton. Canadian manufacturers may have a competitive advantage in equipment for raising wheat and other grains. Mexican grain production has been declining, but the government is determined to help domestic grain producers. Since government assistance is now focussed on profitability rather than income support, this gives an advantage to leading-edge, but cost-effective, equipment.

Livestock Equipment

Higher livestock productivity is mostly being sought through improved herd genetics, and the Mexican market in this area is slowly gaining ground against the US-dominated import market. Other methods include controlled and technical grazing systems, improved pastures, and higher levels of horizontal and vertical integration.

Embryos and sperm are typically imported. The few Mexican suppliers are usually local ranches using imported equipment. Mexican veterinarians are considered to be well trained and prepared for handling insemination technology. The use of bio-genetics has created a demand for embryo and sperm storage facilities as well as lab equipment.

Irrigation Equipment

The government of Ernesto Zedillo issued a new water development program called *Programa Hidráulico 1995-2000,* early in its term. The program calls for the expenditure of about $1.7 billion Mexican pesos on new irrigation projects by the end of the century. The goal of the program is increased international competitiveness. This involves consideration of both technical costs and yields, and therefore the expansion will require research as well as equipment.

Services

There is also a market for agricultural services in Mexico. Budget cutbacks as a result of the devaluation have reduced the ability of the government and agriculture associations to conduct research and promulgate best-practice technologies. Cost-effective methods of delivering these services, possibly by adapting existing Canadian technologies, will find niche markets throughout Mexico. In addition, *Fondo para la Infraestructura Rural y Agropecuaria (FIRA)*, the Fund for Rural Infrastructure and Farming, finances feasibility studies for agricultural development projects.

THE REGULATORY ENVIRONMENT

Agriculture policy is the responsibility of the *Secretaría de Agricultura, Ganadería y Desarrollo Rural (Sagar)*, Secretariat of Agriculture, Livestock and Rural Development.

Government programs include financial assistance for infrastructure development and new equipment purchases as well as training and technical assistance. In October 1995, the Zedillo administration announced the *Alianza para el Campo*, Rural Alliance Program. This program builds upon a previous program known as *Programa de Apoyos Directos al Campo (Procampo)*, which was announced by the Salinas administration in October, 1993. *Procampo* was the centrepiece of the previous government's effort to introduce market forces into the sector and to rationalize crop production.

The main goal of *Procampo* was the replacement of price supports with per-hectare income supports. It was explicitly designed to comply with the requirement of Article 704 of the North American Free Trade Agreement (NAFTA), that member countries move towards agricultural support measures with "minimal or no trade distorting or production effects."

Procampo was designed as a 15-year program, with benefits phased out gradually over the last five years. *Alianza para el Campo* commits the government to continue this plan, with future benefits indexed for inflation based on 1995-96 levels. It expands *Procampo* to include benefits for livestock producers and includes a new program called *Produce*, which provides input and technology subsidies. *Produce* aims to reduce the cost of domestically produced tractors by 40 percent: a 20-percent federal subsidy, 10 percent from the state, and 7 to 10 percent from tractor manufacturers. All of the major tractor producers have agreed to the program.

Another part of *Alianza para el Campo* will make bank loans more readily available. *Fondo para la Infraestructura Rural y Agropecuaria (FIRA)*, the Fund for Rural Infrastructure and Farming, a unit of the *Banco de México*, Bank of Mexico, will now be allowed to support agricultural loans through the commercial banks and through *Banco Nacional de Crédito Rural (Banrural)*, Rural Credit Bank. *Banrural* has been criticized as ineffective by agricultural experts, and access to greater resources with less bureaucracy is expected to improve it substantially.

MARKET ENTRY STRATEGIES

The ability to provide after-sales service and a reliable supply of replacement parts is important for any durable good. But it is critical in a market where expensive equipment may be used for ten years longer that it would be in Canada. And the fact that Mexican farmers have not generally adopted preventative maintenance strategies means that requirements for parts and service tend to be urgent.

Many Canadian companies have found that a partnership or joint venture with a Mexican company is the best way to establish a local presence. Generally, this requires training of Mexican staff. Promotional literature, manuals and training programs must be prepared in Spanish. Companies that can provide financing — especially through leasing — have a distinct advantage in this market.

Most agricultural equipment is sold through distributors who have close ties to the local agricultural associations. This is a very regionalized activity and, in most cases, Canadian manufacturers will be most successful by developing relationships with distributors in each target region.

Canada enjoys an excellent general reputation for high-quality products and technological expertise. But individual Canadian suppliers are not well known in the agricultural sector. Establishing a profile and making contacts is therefore usually the first step for a company contemplating moving into Mexico.

Successful firms often make their first contacts by attending trade shows in Mexico. Companies that cannot commit the resources required for a full exhibit can often participate through Canada Information Booths operated by DFAIT at many major shows.

Contacting Mexican agricultural associations is another good approach. Most farmers are members, and many associations publish directories. They are regionally focussed, and most help their members to evaluate alternative technologies. Government agricultural experts, especially in the regional offices of *Secretaría de Agricultura, Ganadería y Desarrollo Rural (Sagar)*, Secretariat of Agriculture, Livestock and Rural Development, are also good contacts.

KEY CONTACTS

CANADA

Canadian Government

Department of Foreign Affairs and International Trade (DFAIT)

DFAIT is the Canadian federal government department most directly responsible for trade development. The **InfoCentre** should be the first contact point for advice on how to start exporting. It provides information on export-related programs and services, acts as an entry point to DFAIT's trade information network, and can provide copies of specialized export publications and market information to interested companies.

InfoCentre
Tel.: 1-800-267-8376 or
(613) 944-4000
Fax: (613) 996-9709
FaxLink:* (613) 944-4500
InfoCentre Bulletin Board (IBB):
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(613) 944-1581
Internet: http://www.dfait-maeci.gc.ca

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The Trade and Economic Division of the Embassy of Canada in Mexico can provide vital assistance to Canadians venturing into the Mexican market. The trade commissioners are well-informed about the market and will respond in whatever measures possible to support a Canadian firm's presence in Mexico.

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Canadian Consulate
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Local 30-A
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Fax: (52-3) 615-8665

International Trade Centres have been established across the country as a convenient point of contact to support the exporting efforts of Canadian firms. The centres operate under the guidance of DFAIT and all have resident trade commissioners. They help companies determine whether or not they are ready to export, assist firms with market research and planning, provide access to government programs designed to promote exports, and arrange for assistance from the trade commissioners in Ottawa and trade officers abroad. Contact the International Trade Centre nearest you.

World Information Network for Exports (WIN Exports) is a computer-based information system designed by DFAIT to help Canada's trade development officers abroad match foreign needs to Canadian capabilities. It provides users with information on the capabilities, experience and interests of more than 24,000 Canadian exporters. For general information, call (613) 944-4WIN (4946); to register on WIN Exports, call (613) 996-2057, or fax 1-800-667-3802 or (613) 944-1078.

Program for Export Market Development (PEMD)

PEMD is DFAIT's primary export promotion program. It supports a variety of activities to help Canadian companies expand into export markets. PEMD shares up to 50 percent of eligible expenses. Program financial assistance is a repayable contribution, not a grant, and must be approved in advance. For general information, call the InfoCentre at 1-800-267-8376. For applications for assistance through this program, call the International Trade Centre nearest you. In Quebec, PEMD is administered by the 13 regional offices of the Federal Office of Regional Development (FORD Q).

Canadian International Development Agency (CIDA)

CIDA is an important possible source of financing for Canadian ventures in Mexico. A special fund is available through CIDA under the Industrial Cooperation Program (INC). This program provides financial contributions to stimulate Canadian private-sector involvement in developing countries by supporting long-term business relationships such as joint ventures and licensing arrangements. For more information, call (819) 997-7905, or fax (819) 953-5024.

Export Development Corporation (EDC)

EDC helps Canadian exporters compete in world markets by providing a wide range of financial and risk management services, including export credit insurance, financing to foreign buyers of Canadian goods and services, and guarantees.

EDC has established relationships with leading commercial and public sector institutions in Mexico and Latin America. For information on the full range of EDC services, call (613) 598-2500, or fax (613) 598-6858.

Revenue Canada

Revenue Canada, Trade Administration Branch provides service in English, French and Spanish. Revenue Canada publications and customs notices are also available by calling or faxing the NAFTA Information Desk: 1-800-661-6121 or (613) 941-0965; fax: (613) 952-0022.

Business and Professional Associations

Canadian Council for the Americas
Executive Offices
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Alliance of Manufacturers and Exporters Canada
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Language Information Centre
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MEXICO

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Industry Associations and Chambers

National Cattle Ranchers Association
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Mexican Association of Machinery Distributors
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National Association of Dairymen
Asociación Nacional de Productores de Leche (Anple)
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Dairy Cattle Breeders Association
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Fax: (52-42) 24-3933

Trade Publications

Claridades Agropecuarias
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