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Market study on the Mexican market
for meat and livestock products
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Market Study on the Mexican Market for Meat and Livestock Products

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MARKET STUDY ON THE MEXICAN MARKET

FOR MEAT AND LIVESTOCK PRODUCTS

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1. BACKGROUND

Livestock production has traditionally been one of Mexico's most important economic activities. Until this century it had been developed extensively, on open pastures, and with very primitive methods. Slowly this industry has been modernized, integrated and made more productive. At present, livestock production accounts for 2.7% of the country's total GDP and for 8.3% of the agricultural sector's GDP.

Mexico's bovine population has increased gradually since the turn of the century. In 1900, it amounted to 5.1 million head; it practically doubled by 1930 and grew again significantly in the 60's and 70's. Since 1988, it has practically remained the same at 35.4 million head.

Mexican pork production on a massive level started to grow during the 50's as a result of technology imports from the United States, which enabled industrial production of grains necessary to feed the pigs. During the 70's large pork producers started to appear in the Northwestern states of Sonora and Sinaloa, as well as in the Central states of Puebla and Tlaxcala. Pork inventories continued to grow rapidly until 1983-1984, when subsidies were no longer granted to the industry and the economic crisis was most severely felt. Meat production fell by over 40% during the following three years and only started to recover in 1988, as the Mexican economy began to grow.

Poultry has traditionally been a major source of protein for the entire population due to its relatively low price and ease of production. As in the case of pork, poultry was raised under traditional, self-sufficiency technologies until this century, when gradual changes brought about the modernization and large scale production of poultry. Starting in the 50's, large companies began to raise poultry for egg and meat production, bringing about a significant growth in productivity and supply. At present, poultry production is concentrated in few companies, while medium and small scale firms have tended to disappear.

Imports of livestock and meat were practically non-existent until the advent of Mexico's trade liberalization policies, undertaken since 1986, with the accession to GATT. Livestock and meat imports were subject to an import permit requirement with occasional import quotas. During the 70's, an average 30,000 live beef cattle were imported in addition to 100,000 tons of beef meat. Beginning in 1985, imports started to grow and reached 457,000 live cattle, 41 million tons of meat and 120 million tons of beef offals in 1990. A relatively small amount of live pigs, but no meat, were imported for genetic improvement, averaging 3,750 animals per year between 1970 and 1987. Starting in 1987, swine imports started to grow, reaching their maximum of 204,000 head in 1988 and 56.4 million tons of pork meat and 86 million tons of offals in 1989. Imports dropped again in 1990, but are expected to grow again in the coming years, as domestic demand increases. Poultry imports have shown a similar pattern to that

of pork imports, reaching their maximum in 1988 with 1.4 million head of live birds and 78 million tons of meat and offals. The rapid response of local producers to the expansion in demand and the prior import permit requirement now effective on poultry imports have brought about the decrease in poultry imports to 204,000 head and 39 million tons of meat.

Canadian exports to Mexico of livestock products have followed the trend in imports. Total exports were valued at Cdn\$26.9 million in 1989 and Cdn\$23.1 million in 1990. The largest export categories were pork meat (Cdn\$9.3 million), live bovine cattle (Cdn\$7.1 million), pork offals (Cdn\$2.7 million) and beef offals (Cdn\$2.1 million). Mexico represents a large and growing market for Canadian products and Canadian suppliers should take advantage of the present trade conditions to penetrate the Mexican market and to strengthen their presence in Mexico.

2. ECONOMIC ENVIRONMENT

With the objective of reducing the inflation rate, the Mexican authorities implemented a stabilization program, called the Economic Solidarity Pact in 1988, which features traditional austerity measures, entailing tight fiscal and monetary policies and unorthodox measures, such as price, wage and exchange rate controls. This program has been the cornerstone of Mexico's economic policy over the past four years and has resulted in a drastic reduction of the inflation rate, from an annual rate of 159% in 1987 to 52% in 1988 and 19.7% in 1989. Inflation rebounded to 29.9% in 1990 but the Mexican government aims to achieve a 14% inflation rate in 1991. Along with the objective of consolidating the progress made in price stabilization, Mexico's macroeconomic policy in 1991 aims to reaffirm gradual and sustained economic recuperation, basically by establishing the necessary conditions to encourage national and foreign investment and by stimulating local demand.

After the 1986 recession, Mexico's gross domestic product (GDP) increased a moderate 1.5% in 1987 and an additional 1.4% in 1988. Domestic economic activity recovered for the third consecutive year in 1989 with a growth rate of 3.1% and further 3.9% in 1990 to reach \$234 billion (1). With an 81.1 million population, per capita GDP was estimated at \$2,874 in 1990. Additionally, manufacturing output grew by 5.2% in 1990 in real terms, private investment and consumption expanded 13.6% and 5.2% respectively and public investment was up 12.8%. During the 1991-1994 period GDP is expected to maintain an average annual growth rate of 2.5%-3%.

1. Note: All values in this report, unless otherwise stated (Mexican pesos, Mex\$, Canadian dollars, Cdn\$, etc) are quoted in United States dollar equivalents.

In an effort to revitalize and open the Mexican economy, the Mexican Government undertook a series of structural changes, including the accession to the General Agreement on Tariffs and Trade (GATT) on August 24, 1986 leading to an extensive trade liberalization process: import permits were eliminated on all but 325 of the total 11,950 tariff items based on the Harmonized System adopted in 1989. Official import prices are no longer applicable, nor the 5% export development tax, and import duties were lowered from a maximum of 100% in 1982 to 20% in January 1988. The weighted average tariff rate is now 10.4%. The automotive and computer industries have also been liberalized, through the elimination of prior import permits, to allow free entry of products in these industries. The approval of the North American free trade agreement will further strengthen trade between Canada, the United States and Mexico.

According to official data from the Mexican Secretariat of Commerce and Industrial Development (SECOFI), Mexico's trade balance in 1990 dropped once again to a \$3 billion deficit from -\$645 million in 1989. Exports increased by 17.6% in 1990, from \$22.8 billion to \$26.8 billion, while imports grew 27.2%, from \$23.4 billion to \$29.8 billion, having already increased 48% from \$12.2 billion in 1988 and 23.8% in 1989.

Total Mexican imports from Canada increased 24% in 1989 and decreased 1.5% in 1990. Total Canadian exports to Mexico amounted to Cdn\$594 million, while total Canadian imports from Mexico were valued at Cdn\$1,730 million in 1990. Mexico and Canada have traditionally been reasonably important trading partners. According to Mexican figures, in 1989, 1.9% of Mexico's imports came from Canada, while 1.2% of its exports were to Canada. This makes Canada Mexico's fifth largest exporter and sixth largest importer.

3. MARKET ASSESSMENT

The following table shows total apparent consumption of meat, including carcasses and cuts, both fresh and frozen, and offals of beef, pork and poultry.

TABLE 1
TOTAL APPARENT CONSUMPTION OF MEAT
(000 metric tons)

	1988	1989	1990	1994e
Production	3,158.0	2,911.5	3,025.4	3,677.4
+ Imports	279.5	277.6	320.4	523.4
- Exports	5.2	8.3	10.7	13.5
TOTAL	3,432.3	3,180.8	3,335.1	4,187.3

Source: Import-Export data by SECOFI
Local production by SARH

As can be seen, local production clearly dominates domestic consumption. Although Mexico's export capacity is increasing, in particular in the case of poultry, it still is rather small. Imports are slowly increasing their participation, from 8.1% in 1988 to 9.6% in 1990 and are expected to reach 523,400 metric tons by 1994 after a 13% annual increase. This estimate is based on the expectancy of a growing economy, the coming into effect of the free trade agreement and the gradual change in consumer habits towards American style prime cuts. Local production, on the other hand, is expected to grow 5% annually given the surge in demand expected as a result of the growth in GDP and disposable income.

3.1 IMPORTS

Mexican imports of meat have traditionally complemented local production to satisfy domestic demand. The Mexican government has stressed the desire for self-sufficiency in meat products, however this has not been the case in the last decade. On the one hand, droughts and other natural conditions have made this impossible during certain years and, on the other hand, imports have been used as a safety valve either to complement domestic production when it was insufficient or to depress prices when this was deemed necessary. The federal government has traditionally regulated imports of certain products through the use of import barriers, such as the prior import permit, which is presently required for imports of poultry, but not on those of beef and pork. With the free trade agreement, however, trade barriers are expected to be lifted.

The following table shows imports by category in volume and value for the 1988-1990 period, including live animals and cold cuts, which are not included in Table 1.

TABLE 2
IMPORTS OF LIVESTOCK PRODUCTS
Volume and Value
(thousand head, million tons and million U.S. dollars)

CATEGORY	1988 vol	1989 vol	1990 vol	1988 value	1989 value	1990 value
LIVE						
Bovine	205.9	95.0	463.5	176.4	84.7	66.0
Pork	204.4	102.6	24.3	14.1	7.8	6.2
Poultry	1436.6	1165.5	203.7	5.8	3.6	7.5
Total	1846.9	1363.1	691.5	196.3	96.1	79.7
MEAT						
Bovine	26.0	38.9	41.2	57.7	85.6	98.3
Pork	54.1	56.4	26.9	75.5	82.7	48.7
Poultry	78.0	42.4	39.1	63.8	31.6	34.4
Total	158.1	137.7	107.2	197.0	199.9	181.4

OFFALS*						
Bovine	41.9	53.9	120.0	40.3	56.5	43.9
Pork	79.5	86.0	93.1	45.3	52.4	61.4
Total	121.4	139.9	213.1	85.6	108.9	105.3
PORK FAT	29.6	29.4	23.4	15.5	14.0	9.5
COLD CUTS	14.0	24.3	27.8	13.8	26.3	26.9
GRAND TOTAL				508.2	445.2	402.8

Source: Own research based on data by SECOFI

* poultry offals are included under poultry

Imports of live animals have traditionally played an important role. This is due, in the first place, to lack of genetic development in Mexico, which has brought about significant imports of breeding animals. Approximately 18% of total imports (in terms of value) of live bovines were breeding cattle in 1989 and 1990 and 8.5% in 1988. The other large import category is that of milk cows, due to the chronic shortage of milk experienced in Mexico. These represented 11%, 40% and 68% of total imports in 1988, 1989 and 1990 respectively. The balance corresponds mostly to animals for slaughter and very little to calves, since Mexico is a major exporter of calves to the United States. In the case of pigs, 7%, 31% and 68% of imports in 1988, 1989 and 1990 were of breeding animals and the rest for slaughter. Finally, in the case of poultry, 38%, 68% and 79% were progenitors during the same years.

Total meat imports have on average been decreasing year to year, in particular those of pork and poultry, as a result of improved domestic productivity in the case of these two species and to the relatively faster response producers can achieve in the face of improved economic conditions due to their shorter cycles. Bovine meat imports, on the other hand, have increased with the economic upturn because American cuts are perceived to be luxury items. This is also true for cold cuts and sausages, which have shown significant growth rates.

Imports of offals have also increased in the past three years, in this case due to the liberalization of import restrictions and because their prices have been competitive with those of similar products made in Mexico, since offals are generally viewed as waste and have no market in their countries of origin.

According to official data from the Mexican Secretariat of Commerce (SECOFI), practically all of Mexico's imports come from the United States, basically because of geographical proximity and perceived quality, although Canada and certain Latin American countries have also shipped livestock products into Mexico. In the case of livestock, imports from the U.S. represent 93% of total imports of live animals, 91% of beef meat, 99% of beef offals, 97% of pork meat and offals, 99% of poultry and 68% of

cold cuts, sausages and processed meats, followed by Denmark, Belgium, Argentina, France, Spain and Germany.

The following table shows Canadian exports to Mexico. (Canadian imports are nil).

TABLE 3
CANADIAN EXPORTS OF LIVESTOCK PRODUCTS TO MEXICO
(Value in \$000 Cdn. dollars
Volume in head and metric tons)

	1988 value	1988 volume	1989 value	1989 volume	1990 value	1990 vol.
BOVINE						
Breeders (#)	4,002	2,792	7,592	5,292	5,017	3,054
Other live (#)	2,558	2,270	2,034	1,493	2,140	1,526
Meat (ton)	322	161	244	117	31	18
Offals (ton)	3,048	2,074	3,641	2,591	2,074	1,408
PORK						
Breeders (#)	145	301	53	100	541	706
Other live (#)	0	0	41	91	701	2,211
Meat (ton)	2,984	2,570	9,424	6,930	9,325	4,748
Offals (ton)	1,080	2,283	2,930	4,993	2,699	4,541
POULTRY						
Live (#)	436	65552	403	148600	374	45600
Meat&offals (t)	341	124	420	509	201	247
PROCESSED MEAT	411	758	142	157	44	95
& FAT						
TOTAL	15,327		26,924		23,147	

Source: Statistics Canada - International Trade Division

As can be seen in Table 3, Canadian exports of livestock and meat to Mexico have been significant in the past three years, although Mexican data do not reflect this, probably because imports from Canada are shipped through the United States and reported as imports from the U.S. The largest categories are pure bred breeding bovines, other live cattle, pork meat, beef and pork offals. Exports of poultry and processed meats are small, although turkey cuts and offals, especially during the Christmas season represented Cdn \$201,000 in 1990.

Opportunities for Canadian exporters exist in all of these categories, although Canada is best known for the quality of its breeding animals.

Offals will continue to represent good export potential because of Mexico's high demand for these products and the competitiveness of Canadian prices on offals.

Beef cuts are expected to represent an increasing market, as the Mexican consumer begins to appreciate the American type of cut over the Mexican one. Although American cuts will continue to be viewed as a luxury item as long as the official price on beef persists, the improved purchasing power will allow more and more consumers to purchase these cuts. The largest buyers of American cuts will probably continue to be hotels and restaurants, which presently buy approximately 80% of total apparent consumption. On the other hand, lean and boneless meats, as well as flattened cuts, will continue to represent the large majority of beef consumed in Mexico. Therefore, Canadian exporters should consider the possibility of shipping either carcasses or prime cuts in the form as they are cut in Mexico. At present Canadian beef is not competitive in Mexico, but it could eventually be.

In the case of pork meat, Canadian exporters should get to know the Mexican way of cutting carcasses, since most large consumers, such as supermarket chains, will expect to get the primal cuts in the same way as those provided by local suppliers, in order to offer the usual cuts to the consumer. This could be done by sending a butcher of the company to Mexico, in order to learn the Mexican method. Although a small market exists for the traditional American cuts, this still represents a relatively small volume. Lean meats are also favored over fat meats in Mexico, as well as boneless cuts and fresh meats rather than frozen meat. Pork legs for prepared hams are expected to represent an important market, in particular through meat packing houses, which then further process the meat.

3.1.1 BEEF

The following table shows total apparent consumption of beef meat.

TABLE 4
APPARENT CONSUMPTION OF BEEF MEAT
(000 tons)

	1988	1989	1990
Production	1,217.3	1,162.8	1,132.7
+ Imports	26.0	38.9	41.2
- Exports	4.2	4.7	4.3
TOTAL	1,239.1	1,197.0	1,169.6

Imports have traditionally represented a very small proportion of apparent consumption. In 1990, they represented 3.5% of total demand, up from 2% in 1988. In terms of value, beef meat imports represented \$98.3 million in 1990, up 70% from \$57.7 in 1988 and 15% over \$85.6 million in 1989. Several factors have been influential in limiting imports: the fact that imported beef usually is not competitive with domestically produced meat; the official price on beef; and the preference of the Mexican

consumer for lean and boneless cuts, as opposed to the American type cuts. It is expected that imports will begin to play a much more important role as a result of the free trade agreement negotiations on the one hand, but also as a result of improved economic conditions, which will lead to a general surge in demand, but in particular in the demand of luxury type beef cuts, both for the home and in hotels and restaurants.

At the same time, exports will become more attractive through the price differential between local and international prices. Mexico has traditionally been a major exporter of bovine cattle. In 1990 it exported 1.2 million head, mostly of calves to be fattened abroad. It is quite possible that this export trend, presently limited by export quotas, could bring about a reduction in local beef production and an increase in imports to cover the growing demand.

The composition of imports has gradually been changing. While fresh and refrigerated meat represented around 70% of total imports in 1988 and 1989, in 1990, this percentage dropped to 56%, while imports of frozen meat increased proportionately. Imports of carcasses have been decreasing slightly to 34% of total imports in 1990, as compared to 39% in 1988; boneless cuts have increased from 32% to 44% of total imports; and normal cuts with bone now represent 22%, as opposed to 29%.

Mexican imports of beef offals have also played a major role, representing 15% of demand in 1989 (2). The following table shows total apparent consumption of beef offals.

TABLE 5
APPARENT CONSUMPTION OF BEEF OFFALS
(000 tons)

	1988	1989	1990
Production	311.3	310.4	302.4
+ Imports	41.9	53.9	120.0
- Exports	0.2	1.0	0
TOTAL	352.0	362.3	422.4

Of total imports in this category, 18% corresponds to frozen tongues, 16% to frozen liver, 9% to fresh offals and the remaining 47% to other frozen offals.

2. I have not used 1990 figures as reference, since reported imports of 120,000 tons seem exceptional as compared to previous years. It may be possible that import data, which are still preliminary, are incorrect, in particular since this surge in volume is not reflected in an increase but a decrease in value.

Beef offals will continue to represent good market opportunities for Canadian exporters, since imported offals are price competitive with Mexican products and the demand for them will continue to increase.

3.1.2 PORK

Table 6 shows total apparent consumption of pork meat. Total production has been decreasing due to a reduction in the real prices of pork and the increase in the costs of feed. These factors have particularly impacted on the small, family producers, which have tended to disappear, in favor of the large, technologically advanced companies. These have gradually been able to cover existing demand. It is expected that the market for pork meat will begin to grow rapidly in response to a growth in demand.

TABLE 6
APPARENT CONSUMPTION OF PORK MEAT
(000 tons)

	1988	1989	1990
Production	861.2	726.7	732.4
+ Imports	54.1	56.4	26.9
- Exports	0.8	0.2	0.6
TOTAL	914.5	782.9	758.7

Imports are also expected to continue increasing, since imported pork meat has been competitive with local meat since 1987, when the price of pork dropped in the United States. Additionally, the service, quality and reliability of foreign suppliers have allowed their penetration into the Mexican market, which, until 1986, showed no imports.

An important factor that has limited imports is the way the carcass is cut in Mexico as opposed to Canada or the U.S. Since the Mexican wholesaler and retailer buy primal cuts from the obradores (3) rather than carcasses, as in the case of beef, they expect imported meat to be shipped the same way. The American type cuts are still rarely consumed in Mexico. Pork meat is presently subject to a 20% ad valorem import duty. It is possible that the free trade agreement will reduce these rates, making imported products more competitive.

Approximately 30% of pork meat shipped to Mexico is fresh and refrigerated, while the majority is shipped frozen. Carcasses have represented a decreasing percentage of total imports, from

3. The term obrador refers to the intermediary between the slaughterhouse and the wholesaler, who cuts the carcass into the commercial pieces common in Mexico. The obrador can be the same as the introducer.

16% in 1988 to only 4% in 1990. Pork legs with the bone, on the other hand, have increased significantly to 51% in 1990. This is a result of the increase in demand for ham in the face of insufficient local production. At the same time, imported pork legs tend to be more standardized in their size and can therefore be processed more easily. The remaining 35% to 40% corresponds to frozen boneless cuts.

Imports of pork offals have traditionally played a major role in total apparent consumption, representing 48% of total demand. Pork offals are in high demand in Mexico, since they are very popular in the Mexican diet. Imports of pork skins represent 67% of total imports of offals. They are mostly imported frozen. The rest is basically composed of frozen livers and other frozen offals.

TABLE 7
APPARENT CONSUMPTION OF PORK OFFALS
(000 tons)

	1988	1989	1990
Production	113.9	100.6	101.4
+ Imports	79.5	86.0	93.1
- Exports	0	0	0
TOTAL	193.4	186.6	194.5

Offals will continue to represent good opportunities for Canadian exporters, since local production cannot meet demand. At the same time, imported offals are quite price competitive in Mexico, since they are usually not consumed in their countries of origin and have therefore a minor value.

Additionally, imports of bacon are also significant. Imports of non processed bacon amounted to \$2 million in 1988, \$1.6 million in 1989 and \$1 million in 1990. Salted, dried, smoked or pickled pork represented import sales of \$1.7 million in 1988, \$4.9 million in 1989 and \$5.7 million in 1990. Of these, 60% corresponded to bacon and 33% to smoked pork skins. Processed lard and pig fat has traditionally been a major import category, amounting to \$14.0 million in 1988 and \$9.5 million in 1990, corresponding to 29.4 and 23.3 million tons respectively. In the area of processed pork meat imports, these amounted to \$3.2 million in 1988, \$3.5 million in 1989 and \$3.7 million in 1990, composed of hams and other pork preparations.

3.1.3 POULTRY

Imports of poultry have represented a decreasing amount of total consumption, as a result of the prior import permit requirement presently imposed on imports of poultry, in order to sustain the growth and increased productivity of domestic production. While

imports accounted for 11% of total apparent consumption in 1988, when the import permit was temporarily removed, they fell to 5% in 1990. As long as the import permit requirement is still in effect, imports of poultry will be limited. It is however possible that it could be eliminated under the free trade agreement negotiations, allowing for a major entry of foreign products if they are price competitive.

TABLE 8
APPARENT CONSUMPTION OF POULTRY
(000 tons)

	1988	1989	1990
Production	654.3	611.0	756.5
+ Imports	78.0	42.4	39.1
- Exports	0	2.5	5.8
TOTAL	732.3	650.9	789.8

Imports of poultry can be divided into the following categories in 1990: Turkey 6%, ducks and geese 2%, whole chicken, hens and roosters 7%, chicken pieces 38%, livers 47%. The proportion of livers has been increasing from 15% in 1988 to 47% in 1990, while that of chicken pieces has been decreasing from 65% in 1988 to 38%. Prime chicken pieces, in particular the breast but also the legs, are rarely price competitive in Mexico, but offals generally are. In the past, U.S. sanitary regulations indicated that poultry frozen for more than 3 months was no longer fit for direct human consumption. The price on this meat therefore dropped and became competitive in Mexico.

3.2 LOCAL PRODUCTION

Of the total Mexican territory of 197 million hectares, 124.6 million hectares, or 63% are pastures used for livestock, of which 70 million ha. are underbrush, 22 million ha. pastures, 16 million ha. have special grasses and 25 million ha. are pasturelands developed through the over exploitation of forests. Of the total pastureland area, 94% is used for extensive livestock raising in the Center, North and dry tropic areas, while the remainder is for semiintensive, semiextensive and occasional use; 60% of total pasturelands are of communal property, while the other 40% correspond to small private properties.

Mexico's livestock industry can be grouped into five areas of the country (see Map 1): The North (Coahuila, Chihuahua, Durango, Nuevo León, San Luis Potosí, Tamaulipas and Zacatecas); the North-Pacific (Baja Californias, Nayarit, Sinaloa, Sonora); the Gulf (Campeche, Tabasco, Veracruz, Yucatán, Quintana Roo); the Center (Aguascalientes, Guanajuato, Hidalgo, Jalisco, México, Michoacán, Morelos, Puebla, Querétaro, Tlaxcala and the Federal

District); and the South-Pacific (Colima, Chiapas, Guerrero, and Oaxaca).

Beef predominates in the states of Veracruz, Chiapas, Jalisco, Chihuahua, Sonora and Michoacán. Pork is mostly raised in the states of Jalisco, México, Michoacán, Querétaro, Sinaloa, Sonora, Guanajuato and Veracruz. Poultry is raised in Jalisco, México, Michoacán, Querétaro, Sinaloa, Sonora and the Federal District.

During the past decades, Mexico's economic policy has stressed industrial growth as the axis of the country's economic development, mostly through protectionist measures in trade, low real wages and consumer subsidies which have mostly been absorbed by the agricultural sector. Additionally, production costs have increased while many of the end products are subject to price controls, and financing has been scarce and expensive. This has brought about a general decapitalization in the agricultural sector and a concentration of production in large companies, while small and medium sized commercial production has often disappeared. The livestock sector's contribution to GDP has decreased significantly in the past few years, dropping from 4.4% in 1970 to 2.7% in 1988, as a result of general decreases in production. This was due mostly to a general reduction in meat demand as a result of decreased per capita income and a reassignment of resources toward other economic sectors. At the same time, the livestock sector has shown an increasing trade deficit due to increased imports as a result of Mexico's trade liberalization policies and existing price controls.

3.2.1. BEEF

Mexico's total inventory of beef, which was estimated at 35.4 million head in 1990, has remained practically the same in the past ten years. Of this total, 40.4% corresponds to females, 33.4% to cattle for fattening, 19.6% to calves and 6.5% to other cattle. The breeds most commonly found in Mexico are of two types: zebu and European breeds. The first group is most common in tropical areas of the country and includes Brahman, Indubrasil, Gyr, Nelore and Guzerat breeds. European breeds are more common in the Northern part of the country and include Charolais, Hereford, Aberdeen Angus, Beefmaster and St. Gertrudis.

Mexico's bovine production can be divided into three types: Extensive, semi-intensive and intensive. The first kind by far predominates. It has a low technical level and is based on pastureland feed and that of agricultural crops. Individual herds usually fluctuate between 100 and 200 head. The types of livestock raised are crossbreeds of zebu and creole breeds with European breeds. The extensive production produces: 1) calves, mostly for export but also for further fattening, with an average weight of 150 kg when weaned; 2) fattened calves from an initial 100 kg to 340 kg within 6 to 10 months for local and urban consumption, and 3) fattened beef from an initial 180-210 kg to

300-400 kg within 2-4 years also for internal and urban consumption with some exports.

The intensive type, on the other hand, utilizes high technology and raises pure breeds, both zebu and European breeds on balanced feeds, fodder and grain. The average final weight is between 350 kg and 440 kg. Herds are from 200 to 500 animals but can be as high as 1,000. All producers within this segment are organized under local unions and associations and within the National Livestock Confederation.

The semi-intensive type raises dual purpose, zebu and crossbreed cattle in pasturelands. Herds tend to be small, from 35 to 50 head. Calves are sold locally and to large cities, while the milk is for local use only.

Mexico's beef meat production in thousands of metric tons between 1986 and 1990 was as follows:

	1986	1987	1988	1989	1990	1991p
Beef	1,248	1,273	1,217	1,162	1,114	935

p=projected

Source: Boletín Mensual de Información Básica del Sector Agropecuario y Forestal, SARH

Approximately 53% of animals slaughtered are females, 42% steers and 5% bulls. This is basically so because a large proportion of the male calves are exported to the U.S. after being weaned. Of the meat sold in Mexico, a large proportion corresponds to females and it therefore tends to be harder and drier.

There is a total of 1,529 slaughterhouses in Mexico, 95% of which are municipal and have a low sanitary quality, while only 5% are what is called TIF (tipo inspección federal or federally inspected) plants or have TIF features, which include very strict sanitary measures. Close to 40% of all slaughterhouses are in the Central zone of Mexico, around Mexico City; 34% are located in the Gulf and Southeast zones; and 26% in the North. There are a total of 31 TIF plants and 35 plants with TIF features, most of which are located in the North, basically to process export meats. The installed capacity of the 28 TIF plants is of 6.5 million head annually or 7085 head per shift, although much of it is not presently being used. Additionally, there are three TIF processing and packing plants in the states of Chiapas, Guerrero and Tabasco. These 31 plants also have the capacity to refrigerate and freeze 15,460 head.

The distribution system for domestic meat is usually rather long. A series of intermediaries intervene in the process, often increasing the final price on the product. The following diagram illustrates the distribution chain:

PRODUCER

Collector		Introducer
	Slaughterhouse	
	Intermediary	
SUBPRODUCTS	OFFALS	CARCASS
Bone meal		Supermarkets
Blood meal	Offal wholesale	Hotels & restaurants
Meat meal		Public markets
Industrial process	Offal retail	Butchers

CONSUMER

Source: SARH

The collector usually collects cattle from small producers to take to the slaughterhouse. The role of the introducers is to receive the truckloads of live cattle at the slaughterhouse, await the carcass, skin and offals at the other end, and distribute them to their customers for their transformation and/or sale. They usually pay the producer cash for the cattle and cover slaughterhouse fees (\$2053 pesos (Cdn c80) per head of beef, \$958 pesos (Cdn c37) in the case of pork). They charge the producer a 3% commission on each operation. Very often they act as financiers for their customers, who pay on average within 8 to 30 days. Presently the role of the introducer if viewed as a "necessary evil" basically because there are not enough slaughterhouses in the vicinity of the producers and in this way the producer relies on the introducer to receive the trucks at the slaughterhouse and also to distribute the product without having to take care of it himself. At the same time, the butchers rely on the introducers for temporary financing. Some producers, in particular the large ones located in the North and in the states of Veracruz, Tabasco and Jalisco, have integrated a slaughterhouse at the production site, thereby circumventing the need for the introducer and at the same time reducing their transportation costs by using refrigerated trucks to transport up to 50 carcasses, rather than the traditional 10 head of live animals, to the large consumer centers. At the retail level, many butchers rely on additional intermediaries to choose their meat without having to go to the slaughterhouse themselves to do so. Out of the total retail price, it is estimated that 30% corresponds to the producer, 22.5% to the introducer and 47.5% to the butchers.

The current price as of June 1991 was \$5,283 pesos (Cdn\$2.05) per kg. on live cattle and \$8,664 (Cdn\$3.36) per kg. of carcass. Retail prices on beef are federally controlled and basically fluctuate around \$16,000 (Cdn\$6.21) per kilogram depending on the cut. This price is closely observed by supermarkets, since the government has been very strict in their control. Butchers, on the other hand rarely observe this official price because they are much harder to control. Prices per kilogram, as observed during the first week of June 1991 were:

CUT	SUPERMARKET (official price)	PUBLIC MARKET
Live	\$ 5,700 (Cdn\$2.21)	
Carcass	\$ 8,600 (1) (Cdn\$3.34)	
	\$10,800 (2) (Cdn\$4.19)	
Tender cuts: tenderloin,		
T Bone, sirloin, NY	\$17,700 (Cdn\$6.87)	\$28,000 (Cdn\$10.86)
Medium cuts: Flattened leg cuts, stew beef		
lean ground beef	\$15,700 (Cdn\$6.09)	\$18,000 (Cdn\$6.98)
Ribs, minced meat	\$12,500 (Cdn\$4.85)	
Meat with bone & fat	\$ 5,200 (Cdn\$2.02)	\$ 9,000 (Cdn\$3.49)
Ground beef	\$ 4,900 (Cdn\$1.90)	
Tongue	\$19,500 (Cdn\$7.57)	
Kidneys	\$ 5,200 (Cdn\$2.02)	
Liver	\$ 3,950 (Cdn\$1.53)	

(1) slaughterhouse

(2) public market

In the case of what is called in Mexico "American cuts", the June 1991 retail prices cited by local producers were as follows:

CUT	PRICE IN PESOS	PRICE IN CDN DOLLARS
Sirloin	\$25,880	\$10.04
T Bone	\$28,830	\$11.19
Prime Rib	\$24,800	\$ 9.62
New York	\$33,300	\$12.92
Tenderloin	\$35,040	\$13.60

It is estimated that per capita consumption of beef has decreased from a maximum of 11 kg. in 1984 to 9 kg. in 1988 and since. This decrease has been due in the first place to a major reduction in per capita income of approximately 17% in real terms between 1981 and 1988, since beef consumption is very sensitive to income and price; and also to increased competition from substitute products, mostly chicken but also pork meat, which are relatively cheaper. At present 71% of beef is consumed by the higher income classes (defined as 40% of total households), 22% by the middle classes (30% of households) and only 7% by the lower classes (30% of households). The latter tend to consume the less tender cuts equivalent to stew beef, regular short ribs and ground beef from

trimmings. The middle classes favor very flat cuts from the medium tender cuts called bistec and milanese, 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

female per year as compared to 17 in the family unit production, the mortality rate is lower and the number of offspring weaned per female per year is 18.4 in the case of the technified sector vs. 14.5 in the family sector. In the technified sector, the offspring are usually weaned after an average 22-25 days, fattened for 150 days, during which they gain an average 685g per day or a total of 103 kg. to reach a final maximum weight of 112 kg. The average carcass weight fluctuates around 78kg. as compared to 47kg. in the family sector. The feeds used vary according to the six phases of the productive cycle and are based on grains and oilseed meals generally produced by the breeders themselves. The states with greater production in technified units are Jalisco, Sonora, Michoacán and Guanajuato.

In the case of semi-"technified" production, the operation is of the more traditional type, sanitary control is deficient, the genetic quality tends to be low, the type of feed is based on balanced foods purchased commercially and productivity is lower than in the technified sector. It is estimated that this sector accounts for 17% of total production and is concentrated in the central states of Michoacán, Puebla, Tlaxcala, Mexico, Jalisco and the Bajío area (Aguascalientes, San Luis Potosí).

Family unit production is still very common in Mexico, in particular along the coasts, in the tropical and sub-tropical areas, and among low income families. Animals are weaned relatively late, after an average 46 days, and then fed with garbage and some balanced feeds during the last stages before slaughter. Although it is difficult to estimate, production by family units is considered to represent a significant proportion of total local consumption, although sanitary problems are frequent and productivity quite low. There is, however, a tendency towards a greater concentration of production due to the decreased costs associated with economies of scale, vertical integration and technological advances.

It is estimated that approximately 40% of balanced feeds are consumed by the pork raising industry, representing 2.5 million tons of grains (mostly sorghum and some corn) and 700,000 tons of oilseed meals (basically soya). Approximately 67% of all production costs correspond to feed, in addition to the initial cost of the suckling pig (21%), financial expenses (9%), labor (2%) and other (1%). This is why this industry is extremely sensitive to changes in the cost of inputs for feed.

Sanitary problems are still frequent in Mexico, but intensive campaigns have been undertaken to eradicate them. The gravest of them are pork cholera, the Aujeszky illness and several types of parasitosis.

Pork meat production in thousands of metric tons was as follows between 1986 and 1990:

	1986	1987	1988	1989	1990	1991p
Pork	959	915	861	726	757	904

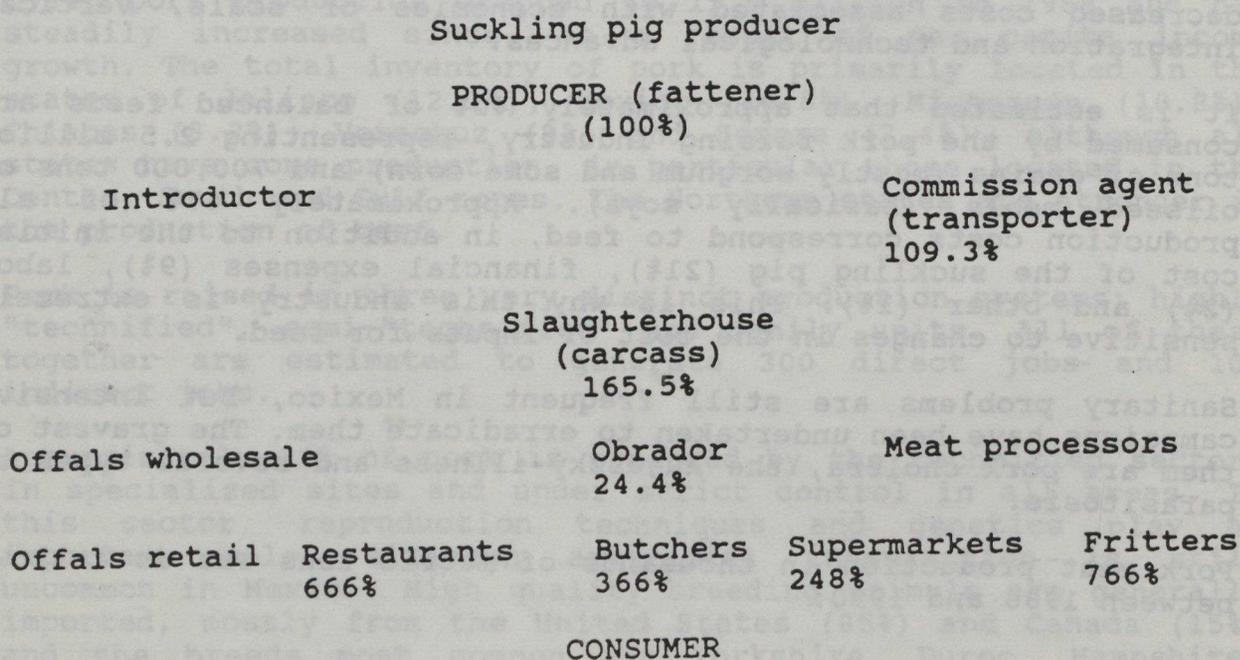
p=projected

Source: Boletín Mensual de Información Básica del Sector Agropecuario y Forestal, SARM

As in the case of beef, although at a lower rate, production decreased from 1.5 million tons in 1984 to 726,000 tons in 1989. This has been due to several factors: the reduction in per capita income and a consequent decrease in demand, the increase in production costs, in particular of feed, and a gradual decrease in the prices for pork. Production has gradually recovered during 1990 and 1991, led by the recovery in purchasing power.

For the slaughter of pork, there are 444 municipal and private slaughterhouses, 65% of which are concentrated in the states of Jalisco, Mexico, Michoacán, Sinaloa, Nayarit and Puebla. Additionally, there are 23 TIF plants either specialized or with a capacity to sacrifice, store and pack pork. They have a total installed capacity of 9,500 head per shift for sacrifice and of 8,350 head for refrigeration, but presently they are only used at 20% of their capacity. These are located predominantly along the Northern border, in the states of Sonora, Baja California Norte, Chihuahua and Nuevo León, since they are mostly used to process export meats, and in the producing state of Jalisco.

As in the case of beef, the distribution process is complex and increases the ultimate sales price up to 7.5 times the initial price of the live animal. The following chart illustrates the distribution flow.



Source: SARM

The suckling pig producers sell the suckling on average 15 days after weaning to the fatteners, who then raise them and sell them to collectors, transporters or introducers. The more "technified" producers usually are integrated and have their own slaughterhouses. They distribute approximately 80% of their production as carcasses or cuts directly to the consumption sites with refrigerated trucks and only send 20% as live animals to other slaughterhouses. The introducer and/or the commission agent deal directly with the producer and receive the live animals at the slaughterhouse and supervise the process. The going price on live animals is \$5,100-\$5,350 pesos (Cdn\$1.98-\$2.08) per kilogram at the slaughterhouse, depending on the area they are coming from, while the price of carcass is \$7,500 (Cdn\$2.91) pesos. Approximately 80% of the pork sold in Mexico is cut the Mexican way (with a hatchet), directly at the slaughterhouse, and only 20% is cut the American way (with a saw) to be sold to meat processors to produce smoked chops and loin. Usually, the complete dead animal is taken to the obrador, who often is the introducer himself, to be cut into the different pieces. Pork is practically never sold as carcass, but in primal cuts directly by the obrador. The meat is not refrigerated after being slaughtered nor during transportation to the obrador because, since it is cut with a knife, it is easier to cut when warm. Refrigerated meat takes three times longer to be cut. (One person cuts 30 animals a day when warm and only 10 when cold).

The offals are mostly sold to wholesalers and the head is often sold directly to head dealers who break it and sell the different parts predominantly to meat processors to prepare queso de puerco (pork head cheese). The packers purchase 80% of all legs to produce smoked ham, spine for spine ham, ribs for smoked ribs, trimmings for sausages, salami, chorizo, etc. and lard for smoked bacon. Butchers and supermarkets purchase what is called capote in Mexico, or the boneless, fatless meat, such as boneless legs, whole loins and tenderloins; ribs, spines, racks without the hipbone, upper hind legs and front feet in addition to fat, liver, kidneys and tongues. Butchers and supermarkets then cut the larger pieces into retail pieces, such as chops, loins and thin leg steaks cut sideways (as opposed to leg steaks as cut in the United States and Canada). As in the case of beef, the Mexican consumer favors lean meats with no visible fat and boneless cuts. It is estimated that 85% of the meat is sold fresh for final consumption and 15% to meat processors. The friers buy the fat (manteca), the skins to prepare cracklings (chicharrón) and fried meat (carnitas).

Going prices on pork during the first week of June 1991 were as follows:

CUT	WHOLESALE (obrador)	SUPER- MARKET	PUBLIC MARKET
Live	\$5,100-\$5,350 (Cdn\$1.98-\$2.08)		
Carcass	\$7,400-\$7,600 (Cdn\$2.87-\$2.95)		
Tenderloin		\$19,900 (7.72)	\$18,000 (6.98)
Loin boneless	\$13,500 (5.24)	\$24,900 (9.66)	\$17,000 (6.60)
Loin regular	\$ 9,500 (3.69)		
Smoked boneless loin		\$25,500 (9.89)	
Ribs	\$10,500 (4.07)	\$16,400 (6.36)	\$16,000 (6.21)
Smoked chops		\$15,490 (6.01)	\$17,000 (6.60)
Leg	\$10,500 (4.07)	\$17,500 (6.79)	
Spine	\$ 7,500 (2.91)	\$11,300 (4.38)	\$11,000 (4.27)
Bacon	\$ 8,000 (3.10)	\$11,900-25,500 (smoked)	(4.62-9.89)
Feet	\$ 1,500 (0.58)	\$ 9,600 (3.72)	\$ 5,000 (1.94)
Fat	\$ 2,400 (0.93)	\$ 4,900 (1.90)	
Head	\$ 1,800 (0.70)		
Tongue		\$ 5,650 (2.10)	
Hides	\$ 6,000 (2.33)	\$23,000 (8.92) (fried)	\$24,000 (9.31)
Offals	\$85 (0.03)	times the live weight	

Note: All numbers in brackets correspond to Canadian dollar equivalents)

Total per capita consumption of pork has shown a significant decrease, from close to 20kg to the present 10kg due to a contraction both in demand (lower per capita income) and supply (higher production costs, decreasing prices of pork). Although prices of pork tend to be on average lower than the prices of beef, despite not being government controlled, the difference has not been sufficient to bring about a substitution of consumption towards pork. This may be so because, as in the case of beef, pork is consumed mostly by the higher and medium income classes, although it is not as drastic as in the case of pork. Here, 62% is consumed by higher income classes, 26% by the medium income classes and 12% by the lower income classes (as compared to 71%, 22% and 7% respectively in the case of beef). Processed meats and cold cuts are also purchased predominantly by the higher classes, although these favor the leaner and purer meats, such as smoked ham and loin, bacon, salami and raw ham; while the lower classes buy sausages, chorizo, pork pies and pork cheese, which have lower prices. The cooked ham is under official price control and is therefore not produced with pork leg, but with other ingredients. Other varieties of ham are more expensive and are purchased by higher income classes.

3.2.3 POULTRY

The total inventory of chicken for meat production steadily increased until 1985, when it reached 137.8 million head. It dropped to 102.7 million in 1986 and has since then increased to the present 118.8 million. Of these, 97% are chicken for

fattening and the rest are laying hens and roosters (progenitors and reproducers). Poultry production is concentrated in the states of Jalisco (12%), Mexico (11%), Michoacán (9%), Querétaro (7%), Puebla (7%), Veracruz (6%), Nuevo León (6%) and Sonora (6%). As can be seen, most production is centered around the country's largest cities, in particular Mexico City, Guadalajara and Monterrey.

Poultry production is the most "technified" livestock sector in Mexico and it is estimated to employ some 33,000 people. There are three types of farms: those raising progenitors, which sell pure breeding animals for genetic improvement. These are imported, since Mexico does not have pure breeds. These farms are very modern, due to the high value of these animals, and include automated feeding, lighting and environmental control equipment, in addition to top quality feeding and sanitary programs. There are at present nine firms in this field, with a capacity for the incubation of 3.4 million eggs per month. Of these firms, four produce 68% of reproducers sold in the Mexican market. The next step are farms which produce reproducers to further produce chicken for feeding. These farms are also modern and use technology similar to that of the progenitor farms, although some simpler operations also exist. The capacity of these farms, of which there are an estimated 86, is of 89 million eggs per month. Finally are the chicken raising firms, estimated at 2,135, which have a capacity from 2,000 to 100,000 head per cycle. Only 4.4% of all firms produce 55% of the country's total chicken production. Often these three functions are integrated into one firm, in particular the reproducers and chicken raising firms. The latter can then further be divided into three types according to their technological sophistication.

The highly automated firms have automatic feeding, lighting and sanitary processes, in addition to the best sanitary and feeding programs. They also have the highest volumes of production, since they raise 50,000 chicken or more. There are only some 260 farms in this category, which supply 70% of the Mexican market. This concentration is mostly due to the increased competitiveness of farms vertically integrated in the production of feed. Poultry feed is based on sorghum (62%) and soya meal (25%), although sesame, safflower, sunflower, fish and meat meal, corn and wheat are also used. Total production of feed by these companies is estimated at 600 thousand tons or 32% of the total production of 1.9 million tons.

The semi-technified sector comprises a variety of firms, with different levels of technical sophistication. Some use modern processes at some levels, while others have adapted obsolete machinery. Sanitary supervision is not always satisfactory. These firms purchase commercial feeds and have no capacity for feed production, thereby significantly increasing their costs, since feeds account for 67% of the total production costs, followed by the cost of the chicken (20%). These farms raise from 2,000 to 50,000 chicken per cycle and are estimated at 1,770. These farms

tend to disappear or to be purchased by the larger producers, since they are not as price competitive.

Mexico's technical parameters have improved significantly in the "technified" sectors, as a result of better feeding and sanitary patterns, and are similar to those in other developed countries: the feed to meat conversion index has decreased from 4.5 kg of feed per kg. of meat in 1980 to 2.5 kg in 1990. The average carcass weight is 1.4 kg on chicken and 1.2 kg on hens. The extraction rate has also increased to approximately 400%. Genetics have also played an important role in this sector to increase productivity. Most progenitors are imported, since genetics are not very developed in Mexico yet. On the other hand, reproducing hens are produced in Mexico. Pure breeds most commonly used in Mexico are White Cornish and White Plymouth Rock. The commercial lines which issue from these are Hybro, Arbor Acres, Ross, Hubbard, Indian River, Pilch, Peterson, Shaver Starbro and Cobbs-Vantress.

On the other end are a multitude of family operations which represent the majority of producers but which are basically oriented towards their own consumption. Some eggs are for consumption, while others are for further reproduction. They use low productivity cross-breeds, often have sanitary problems and high mortality rates, and have bad feeds, based on garbage and whatever the animals pick outdoors. Only sporadically are the chicken fed grains or other balanced feed.

Meat production, on the other hand has steadily increased since 1980, at an average annual rate of 7%. The number of animals sacrificed reached 445 million in 1990, as compared to 259.5 million in 1980 and meat production increased from 399.2 million tons of carcass to 756.5 million tons (11.5% of which corresponds to laying hens and breeding animals). This has been due to an increase in both the numbers and the weight per bird as a result of the increased productivity experienced by the industry. At the same time, demand has been shifting from beef and pork meat towards chicken due to its lower price and for health considerations, since chicken is known to have less fat content. Chicken meat consumption as a percentage of total meat consumption has increased from 12.7% in 1980 to 24.5% in 1990. The following table shows poultry meat production in thousand tons between 1985 and 1990.

	1985	1986	1987	1988	1989	1990
Poultry	588.6	672.6	672.9	654.3	611.0	756.5

Source: Boletín Mensual de Información Básica del Sector Agropecuario y Forestal, SARH

The Mexican poultry industry has gradually become more productive through its vertical integration and the technical improvements

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

process of chicken includes the production of broth, soups, sausages and other processed meat products, although this still represents only a small proportion of total meat production. There are only few plants making chicken meat products, which are still not very common in Mexico.

The slaughterhouse usually delivers the chicken as carcass. One distribution channel goes from slaughterhouse to warehouse, usually in predetermined sporadic quantities. These are then sold to retailers, who either get it at the warehouse or at their own establishment. Approximately 60% of the meat is sold this way. In 30% of the cases, the warehouse does not intervene and the slaughterhouse directly sells the meat to the retailer. This is the case with very large firms which have their own refrigerated transportation. Another 15% is sold directly to the consumer by fully integrated firms, which purchase the live chicken and process it to sell it at the firm itself or to restaurants. The remainder is sold directly by the producer to meat processing firms.

The price to the final consumer of whole chickens is 54% higher than the cost of the live chicken. In the case of prime pieces, such as breast and legs, the difference is of 123%. In addition to the prime cuts consumed mostly by the high and middle income classes, offals are in high demand, in particular liver, as well as the wings, the feet, the neck and the back, which are used for soups and broths, or shredded in tacos and other dishes. At public markets, the chicken is usually sold whole with the head, feet and some offals (liver, heart and sweetbread) or it can be sold by piece. At supermarkets the whole chicken does not have either head nor feet and the offals are included separately. Individual pieces are also sold. Presently it is more common to purchase pieces than whole chicken. In Mexico there are many small takeout shops specializing in broiled chicken, which is very popular. These broilers are an important purchaser of whole chicken. Offals are often sold fresh directly to the consumer or to meat processing plants. The blood, feathers and other offals are also sold to meal producing plants.

Going prices on chicken were as follows during the first week of June 1991:

CUT	SUPERMARKET	PUBLIC MARKET
Live	\$3,800 (1.47)	
Carcass	\$4,600 (1.78)	
Whole	\$ 5,490 (2.13)	\$ 7,000 (2.72)
Breast	\$11,800 (4.58)	\$12,000 (4.66)
Leg	\$11,500 (4.46)	\$10,000 (3.88)
Back	\$ 2,500 (0.97)	\$ 3,000 (1.16)
Wings	\$ 5,750 (2.23)	
Feet	\$ 2,600 (1.01)	
Offals	\$ 5,700 (2.21)	

Note: Numbers in brackets correspond to Canadian dollar equivalents.

Per capita consumption of chicken meat has increased significantly in the last decade, from 5.7 kg. in 1980 to 9.1 kg. in 1990. This has been mostly due to its lower relative price. Chicken also doubled its participation in total meat consumption, from 12% to 24%, between 1980 and 1990. As in the case of pork and beef, the higher income classes consume 77% of chicken meat sold, the middle income classes 19% and the lower classes 4%. The higher income classes favor breasts and legs, while the lower income classes purchase wings, offals and heads. Consumption is also concentrated around urban areas, which account for approximately 30% of total consumption. Rural areas, on the other hand, usually have family operations and cover their needs internally. It is estimated that 98% of the urban population and 25% of the rural population consume chicken meat.

4. MARKET ACCESS

Sales in Mexico are usually made through local agents and distributors, normally operating on a commission basis. Decisions should be taken on whether to use an agent, joint venturing or licensing with a Mexican company. Mexico's market is highly competitive and companies which maintain an active presence in the market and establish a good track record by virtue of competitive price and reliability usually do well.

As a result of Mexico's accession to GATT, the Mexican Government has gradually opened the economy to international suppliers. Import duties have been lowered from a maximum 100% in 1983, to 20% since December, 1988. The official import price system has been totally eliminated and import permits are required on only 325 of the total 11,950 items in the Mexican Tariff Act. Mexico adopted the Harmonized System of Tariff Nomenclature on July 1, 1988.

Imports of meat and cattle are subject to a 0% to 20% ad valorem duty assessed on the F.O.B. invoice value. In addition, a 0.8% customs processing fee is assessed on the invoice value. The 15% value added tax, usually assessed on the cumulative value of invoice plus the above taxes, is waived on imports of meat and livestock products. Import duties applicable to items in this study are as follows:

HARMONIZED SYSTEM NUMBER	DESCRIPTION	DUTY	PERMIT
02.01.xxxx	Fresh beef	0%	
02.02.xxxx	Frozen beef	0%	
02.03.xxxx	Pork	20%	
02.06.10-29	Beef offals	20%	
02.06.3001	Pork pellets	10%	
02.06.3099	Pork offals	20%	

02.06.4101	Pork livers	20%	
02.06.4901	Pork hides	0%	
02.06.4999	Other pork offals	20%	
02.06.80xx	Other offals	10%	
02.06.90xx	Other offals	10%	
02.07.10xx	Whole poultry fresh	10%	yes
02.07.21xx	Whole chicken frozen	10%	yes
02.07.22xx	Whole turkeys frozen	10%	yes
02.07.23xx	Whole ducks & geese frozen	10%	yes
02.07.3101	Duck & goose fat livers	10%	
02.07.3999	Other poultry pieces & liver	10%	yes
02.07.41	Chicken pieces & liver frozen	10%	yes
02.07.42	Turkey pieces & liver frozen	10%	yes
02.07.43	Other poultry pieces	10%	yes
02.07.50	Frozen poultry liver	10%	
02.09.0001	Bacon	10%	yes
02.10	Processed meats	10%	
16.01	Sausages	15%	
16.02	Processed meat products	20%	

Additionally, a special permit is required from the Secretariat of Health (Secretaria de Salud) and from the Secretariat of Agriculture and Hydraulic Resources (Secretaria de Agricultura y Recursos Hidráulicos). The Canadian exporter needs to fill out a special application form for these permits indicating the names of the importer and exporter and the exact merchandise that will be shipped. The exporter will then receive an official authorization indicating the necessary documents and the conditions that have to be met before the animals or the meat is shipped. In the case of live animals an official health statement issued by a veterinarian and legalized by a Mexican consulate in Canada is required. The contents of this certificate varies, but usually should include an indication of vaccines given, as specified by the official authorization, and the absence of certain diseases. The authorization will usually be valid for 90 days once issued. Never ship livestock or meat without the necessary authorizations and certificates, since they will not be allowed into the country without them.

Due to the complexity of phytosanitary regulations, the Canadian exporter should contact the Mexican importer, his customs broker, or the National Livestock Confederation to inform them of the goods he intends to ship, in order to initiate the necessary formalities, at least three months before the shipping date.

There are no official metric requirements applicable to imports into Mexico, However, since the metric system of units is by law the official standard of weights and measures in Mexico, importers will usually require metric labeling for packaged goods, although the English system is also used. Dual labeling is acceptable. Imported products must be labeled with a small sticker label in Spanish containing the information listed in the attached description. Mexico adheres to the International System of Units (SI). Electrical standards are the same as in Canada.

Electric power is 60 cycles with normal voltage being 110, 220 and 400. Three phase and single phase 230 volt current is also available.

Prepared by:
Caroline Verut
for the Canadian Embassy
Mexico City
June 1991

APPENDIX 1
IMPORTERS/DISTRIBUTORS/USERS
OF IMPORTED MEAT

When dialing from Canada, all telephone and fax numbers listed below, except those preceded by an area code in brackets, should be preceded by the following numbers: 011-525. If there is a different area code, dial 011-52, the area code and the number.

INDALMEX S.A. de C.V.
Av. de la Luz 34
Col. Cuautitlán Izcalli
54830 Cuautitlán, Estado de México
Phone: 872-2535 872-3300 ext. 218, 307, 308
Fax: 872-6099
872-2239
Contact: Lic. Jorge Saint Martin
Meat buyer for supermarket chain

LACTIVAL S.A. de C.V.
Encarnación Ortiz 1608
Col. del Gast
02950 México D.F.
Phone: 355-0985
Fax: 355-5384
Importer of cold cuts

IMPORTERS & DISTRIBUTORS OF AMERICAN AND MEXICAN TYPE MEAT CUTS

ALIMENTOS EN SU HOGAR S.A. de C.V.
Canela 104-B
Col. Granjas México
06400 México D.F.
Phone: 657-4424
Fax: 657-6892
Contact: Dr. Claudio Lemionet - International Department
Alfredo Valencia - Director General

or
Horacio 124-503
Col. Chapultepec Morales
Phone & Fax: 255-3842
Meat buyer

ALIMENTOS SANIMEX S.A. de C.V.
Calzada de la Viga 216
Col. Lorenzo Boturini
México D.F.
Phone: 740-9676 740-8333
740-8668 740-8873
Fax: 740-8248
Contact: Sr. Moisés Nankin
Meat buyer

ARDURA DE MEXICO S.A. de C.V.
Av. Central 143
Col. Unidad Industrial Vallejo
07700 México D.F.
Phone: 754-6197 752-4227
Fax: 586-6191
Contact: José Manuel Ardura
Pork meat buyer

CARNE BUENISISMA
Francisco Silva Romero 327
Col. Sector Reforma
Guadalajara, Jalisco
Phone: (36) 17-8013 17-3479
Contact: Lic. Rolando Ramírez Jiménez
Javier Ramírez Macías
Beef and pork meat buyers

CARNES Y ALIMENTOS SAN NICOLAS S.A. de C.V.
Porfirio Díaz 600 Pte.
San Nicolás de los Garza
66400 Nuevo León
Phone: (83) 52-5517 32-0690
Fax: (83) 76-5636
Contact: Carlos or Mario González
Pork meat buyer

CARNES Y CORTES LA FLORIDA S.A. de C.V.

Av. Morelos Sur 901

Cuernavaca

62050 Morelos

Phone: (73) 14-0965 18-4855

Fax: (73) 18-9307

Contact: Lic. Albino Lara

Beef meat buyer

DINAMICA ALIMENTICIA S.A. de C.V.

Filiberto Gómez 98

Col. Tlalnepantla

54000 Estado de México

Phone: 390-4855

Fax: 390-7296

Contact: Sr. Arturo Mendoza

DISTRIBUIDORA DE PRODUCTOS REFRIGERADOS

J. López Hickman 603

Col. Caracol

64810 Monterrey, Nuevo León

Phone: (83) 44-1875 40-4295

40-4740

Fax: (83) 40-2415

GRUPO COSMOS S.A. de C.V.

Tennyson 133

Col. Polanco

11560 México D.F.

Phone: 203-4420

Fax: 254-0656

Contact: Sr. Elías Lanson

Meat buyer

GRUPO DISTRIBUIDOR TUCAN S.A. de C.V.

Fresnillo 60-5

Col. 20 de Noviembre

15310 México D.F.

Phone: 702-2226 702-3858

Fax: 795-0491

Contact: Sr. Rodolfo Arellano

Pork meat buyer

D.A.Y.E.C. S.A. de C.V.

Tamaulipas 12

Col. Chapultepec

62450 Cuernavaca

Morelos

Phone: (73) 15-8419 15-7419

15-7219

Fax: (73) 15-7991

Contact: Ing. Andrés Muller Steiger

Meat buyer

DISTRIBUIDORA DE PRODUCTOS REFRIGERADOS S.A.

J. López Hickman
Col. Caracol
64810 Monterrey, Nuevo León
Phone: (83) 44-1875 40-4295
40-4740
Fax: (83) 40-2415
Contact: Sr. Moisés Hernández

LA FORTUNA DE MONTERREY S.A. de C.V.

Químicos 223
Col. Tecnológico
Monterrey, Nuevo León
Phone: (83) 58-2903 55-6033
58-3520 55-6034
Fax: (83) 55-6034
Contact: Lic. Fidel Cantú Martínez

OPERADORA DE PRODUCTOS PECUARIOS

Av. los Angeles 1101 Ote.
Col. del Norte
64500 Monterrey, Nuevo León
Phone: (83) 51-1788 51-3723
(83) 51-7972 51-0746
Contact: Ing. Andoni Arruti
Beef meat buyer

PROMOTORA DE CARNES ALPRO S.A. de C.V.

Lago Cuitzeo 113
Col. Anáhuac
México D.F.
Phone: 396-0022 396-0424
396-0223
Fax: 341-3691
Contact: Lic. Jaime F. Maliachi
Buyer of pork

PROVEEDORA DE PERECEDEROS S.A. de C.V.

Centeno 421-A
Col. Granjas México
08400 México D.F.
Phone: 650-6422 650-6618
657-6700
Fax: 657-7232
Contact: Sra. Socorro Macías
Meat buyer

RIBER

Terán 427
San Nicolás de los Garza
66400 Nuevo León
Phone: (83) 50-0933
Fax: (83) 76-8307

ROGELIO COUTTOLENC CORTES S.A. de C.V.

Calle 10 No. 8

Col. San Pedro de los Pinos

03800 México D.F.

Phone: 516-6838 271-4589

Fax: 277-8163

Contact: Sr. Gustavo Couttolenc Echeverría
Importer of pork meat

SUPER BOCADOS CAMARGO

Tuxtla 402

Col. Mitras Norte

64320 Monterrey, Nuevo León

Phone: (83) 70-0196 71-0093

Fax: (83) 73-4151

Contact: Adán or Gilbero Cano
Meat buyer

SUPER CARNES SALINAS S.A.

Abraham Lincoln 175 Pte.

Col. Mitras Norte

64320 Monterrey, Nuevo León

Phone: (83) 73-2101 73-2102

Fax: (83) 73-5577

Contact: Lic. Juan Francisco Salinas
Meat & offals buyer

UNIVERSAL DE COMERCIO EXTERIOR S.A. de C.V.

José Vasconcelos 220 piso 4

Col. Condesa

06140 México D.F.

Phone: 211-0044 211-0052

Fax: 211-0101

Contact: Dr. Enrique Morales
Meat buyer

MEAT PROCESSORS AND PACKERS (EMPACADORAS)

The majority of meat processors in Mexico buy imported meat, but not all of them import it directly. Imports are usually handled by large distributors and/or by brokers along the Mexico-U.S. border. However, most small and medium sized meat processors are interested in importing directly and wish to receive more information.

ALFA ALIMENTOS S.A. de C.V.

Lamartine 346

Col. Polanco

11570 México D.F.

Phone: 250-1400

Contact: Ms. Rosita Pérez

ALIMENTOS PAR S.A. de C.V.
Sierra Nevada 6-12-14
Parque Industrial Nezahualcóyotl
57800 México D.F.
Phone: 855-5822 855-2359
855-2957
Fax: 855-6599
Contact: Sr. Francisco Pardo Arroyo
Meat buyers

CARLOS PASTRANA
Madero 306
52400 Tenancingo
Estado de México
Phone: (724) 211-85 201-87
Fax: (724) 211-85
Contact: Carlos Pastrana Guadarrama
Meat buyers

CARNICERIA Y TOCINERIA LA POPULAR S.A.
Basilio Vadillo 928
Sector Libertad
Guadalajara, Jalisco
Phone: (36) 43-7207 43-7206
Fax: (36) 43-7155
Contact: Eliseo Ramos Cervantes
Meat buyer

CONSORCIO DE EMPACADORAS B.R., S.A. de C.V.
Juárez Sur 506-A
Toluca, Estado de México
Phone: (721) 485-56 327-69
Contact: Carlos Guerra
Beef buyers

DISTRIBUIDORA DE CARNES SUPERIORES S.A.
F. Gómez 89
Tlalnepantla
Estado de México
Phone: 390-5102 390-5182
Fax: 390-5142
Contact: Sr. Huerta
Lic. Ernesto Mendoza Tel. 390-4855

DONFER S.A. de C.V.
Rojo Gómez 41
Col. Guadalupe del Moral
09300 México D.F.
Phone: 686-2400 686-9699
686-8842
Contact: Francisco Rión
Pork and turkey meat importer. One of the largest meat processors
in Mexico with brands Donfer, Alpino and Riojano.

EL RIOJANO S.A.
Av. Ermita Iztapalapa 756
Col. Granjas San Antonio
09070 México D.F.
Phone: 685-1725 685-3731

EMPACADORA BERNINA S.A. de C.V.

Col.
México D.F.
Phone: 396-7587 396-7359
Fax:
Contact: Sr. Andrea Bosshard

EMBUTIDOS REMIREZ S.A. de C.V.
Alhambra 614
Col. Portales
03300 México D.F.
Phone: 539-2463 672-5199
Fax: 672-5195
Contact: Antonio Remírez
Pork meat buyer

EMPACADORA ARAGON S.A.
Av. 506 No. 90
Unidad San Juan de Aragón
07920 México D.F.
Phone: 551-6257
Contact: Oscar Amaro
Meat buyer

EMPACADORA CURIEL S.A.
Iztaccihuatl 294
Col. Moctezuma 2a sección
15500 México D.F.
Phone: 762-2995
Contact: Sr. Curiel
Pork buyer

EMPACADORA ELVIRA S.A.
Antonio Plaza 14
Col. Algarín
06880 México D.F.
Phone: 519-3168 519-3773
Contact: Agustín Barrios
Meat buyer

EMPACADORA FRITZ S.A.
24 Sur 2113
Col. Bella Vista
72500 Puebla, Pue.
Phone: (22) 43-3744 43-3617
43-5783
Fax: (22) 37-6000
Contact: Ing. Ricardo Rausch
Meat importer

EMPACADORA HARRY S.A.
San Lorenzo 909
Col. del Valle
03100 México D.F.
Phone: 688-4466 604-1698
Contact: Harry Luebtke
Meat buyer. Interested in buying ham.

EMPACADORA HERCAM S.A.
Municipio Libre 15
Col. Portales
03570 México D.F.
Phone: 532-8810
Fax: 539-1380
Contact: Alfredo Camarena
Pork buyer

EMPACADORA JANDA S.A.
Calz. Tulyehualco 1-0
Col. Sta. Isabel Industrial
09820 México D.F.
Phone: 582-0069 582-6715
Contact:
Interested in buying turkey

EMPACADORA JAVIER S.A.
Matamoros 1
Col. Centro
56600 Chalco, Estado de México
Phone: (597) 317-09 316-06
Fax: (597) 311-98
Contact: Oscar Corona Reynosa
Meat & offal buyer

EMPACADORA KLAUS SCHRAERMAYER GOERTZ S de R.L. de C.V.
Israel 321
Central de Abasto
San Luis Potosí, S.L.P.
Phone: (48) 18-0889 18-0330
Contact: Mr. Schraermeyer
Meat buyer

EMPACADORA LA ESMERALDA
Calle 4 No. 46
Col. Olivar del Conde
01400 México D.F.
Phone: 651-3651
Contact: Lic. José María Cedillo
Meat buyer

EMPACADORA LA MONTAÑESA S.A.
Miguel Negrete 4
Col. Postal
03440 México D.F.
Phone: 696-1111
Contact: Roberto Revilak
Meat buyer

EMPACADORA MURGATI S.A.
López Mateos 52
Col. 10 de abril
53320 Naucalpan, Estado de México
Phone: 373-5898
Fax: 373-4562
Contact: Pedro Apilano
Meat & offals buyer

EMPACADORA PONDEROSA S.A.
José Santos Chocano 970
Col. Anáhuac
San Nicolás de los Garza
66450 Nuevo León
Phone: (83) 76-6122
Fax: 76-0427
Contact: Lic. José Inés Cantú

EMPACADORA RIO FRIO S.A. de C.V.
Río Lerma 102
Col. Manantiales
Cholula, Puebla
Phone: (22) 47-1742 47-1189
Contact: Fidel Pichel
Meat buyer

EMPACADORA SAN EMILIO
Hidlago 47
San Antonio Tultitlán
54900 Tultitlán, Estado de México
Phone: 872-0576 872-0465
Fax: 872-0576
Contact: Emilio Sánchez
Lard and turkey importer

EMPACADORA SK S.A. de C.V.
Camino San Rafael 90
Guadalupe
Nuevo León
Phone: (83) 77-0200 77-0312
77-0364 34-0001
Fax: (83) 34-0043
Contact: Lic. Mauricio Chapa
Beef meat buyer

EMPACADORA TAJO S.A.
Heliotropo 132
Col. Sta. María la Ribera
06400 México D.F.
Phone: 547-7102
Contact: José Olvera
Pork buyer

EMPACADORA TREVIÑO S.A. de C.V.
Ejército Nacional 505-904
Col. Anáhuac
11520 México D.F.
Phone: 255-5082 255-5174
Fax: 255-5102
Contact: Lic. Alfonso Alfaro
One of the largest importers and distributors of meat & offals

and
Miguel Barragán 811 Pte.
Col. Industrial
64440 Monterrey, Nuevo León
Phone: (83) 74-6000 74-6532
Fax: (83) 72-1762
Contact: Ing. Gorena or Mario Mireles

and
Guadalajara, Jalisco
Phone: (36) 19-0979
Fax: (36) 19-5898

EMPACADORA VIENA S.A. de C.V.
Calle 13 No. 33
Col. Moctezuma la. sección
15500 México D.F.
Phone: 784-7255 784-6655
Fax: 784-6655
Contact: Alberto Curiel
Meat buyer

EMPACADORA WUNSCH S.A. de C.V.
Calle 10 No. 6
Col. San Pedro de los Pinos
03800 México D.F.
Phone: 516-6838
Contact: Alejandro Gama
Meat buyer

EMPACADORA XALOSTOC S.A. de C.V.
Electricidad y Luis G. Sada 13
Frac. Industrial Xalostoc
55340 Estado de México
Phone: 569-3855 569-2446
Fax: 569-2413
Contact: Sr. Francisco Lozano Alexandre
Rafael Figueroa
Beef meat buyer

INDUSTRIAL DE ABASTOS S.A.
Av. de las Granjas 800
Col. Ferrería
02310 México D.F.
Phone: 394-0088 394-0148
394-0176 394-0082
Contact: Lic. José Luis García Nájera
Mexico City's largest slaughterhouse and refrigerated warehouse.
Meat buyer

INDUSTRIAL ALIMENTICIAS CHACIN S.A. de C.V.
Llanura 27
Col. Ampliación las Aguilas
01710 México D.F.
Phone: 680-1828 651-3617
Fax: 680-1828
Contact: José Manuel Leyva
Meat & offals buyer

INDUSTRIAS SUCARNE S.A. de C.V.
Torno 161
Col. Sevilla
15840 México D.F.
Phone: 768-9588 768-9170
768-9296
Fax: 740-7011
Contact: José Luis Hernández
Pork & offals, turkey buyer

JAMON SERRANO DE MEXICO S.A. de C.V.

Zempoala 75

Col. Narvarte

03020 México D.F.

Phone: 538-6958 538-6211
538-8860

Contact: José Luis Ruedas
Raúl Benavides

Pork buyer

PARMA/INAIC

Av. de las Fuentes 41A 4o y 5o piso

Col. Lomas de Tecamachalco

53950 Naucalpan, Estado de México

Phone: 589-2800 589-2359
589-2049

RYC ALIMENTOS S.A. de C.V.

19 Oriente 16

Col. El Carmen

Puebla, Pue.

Phone: (22) 43-8918 43-8937
Fax: (22) 37-3736

Contact: Ing. Lozano Torres
Meat & offals buyer

SIGMA ALIMENTOS S.A. de C.V.

Ernesto Pugibet 2

Col. Industrial Xalostoc

55340 Ecatepec, Estado de México

Phone: 569-2311

Contact: Maricela Negrete

Large meat processor with brands Fud, Iberomex, Viva and San
Rafael. Meat buyer.

ZWANENBERG DE MEXICO S.A.

Estacas 34

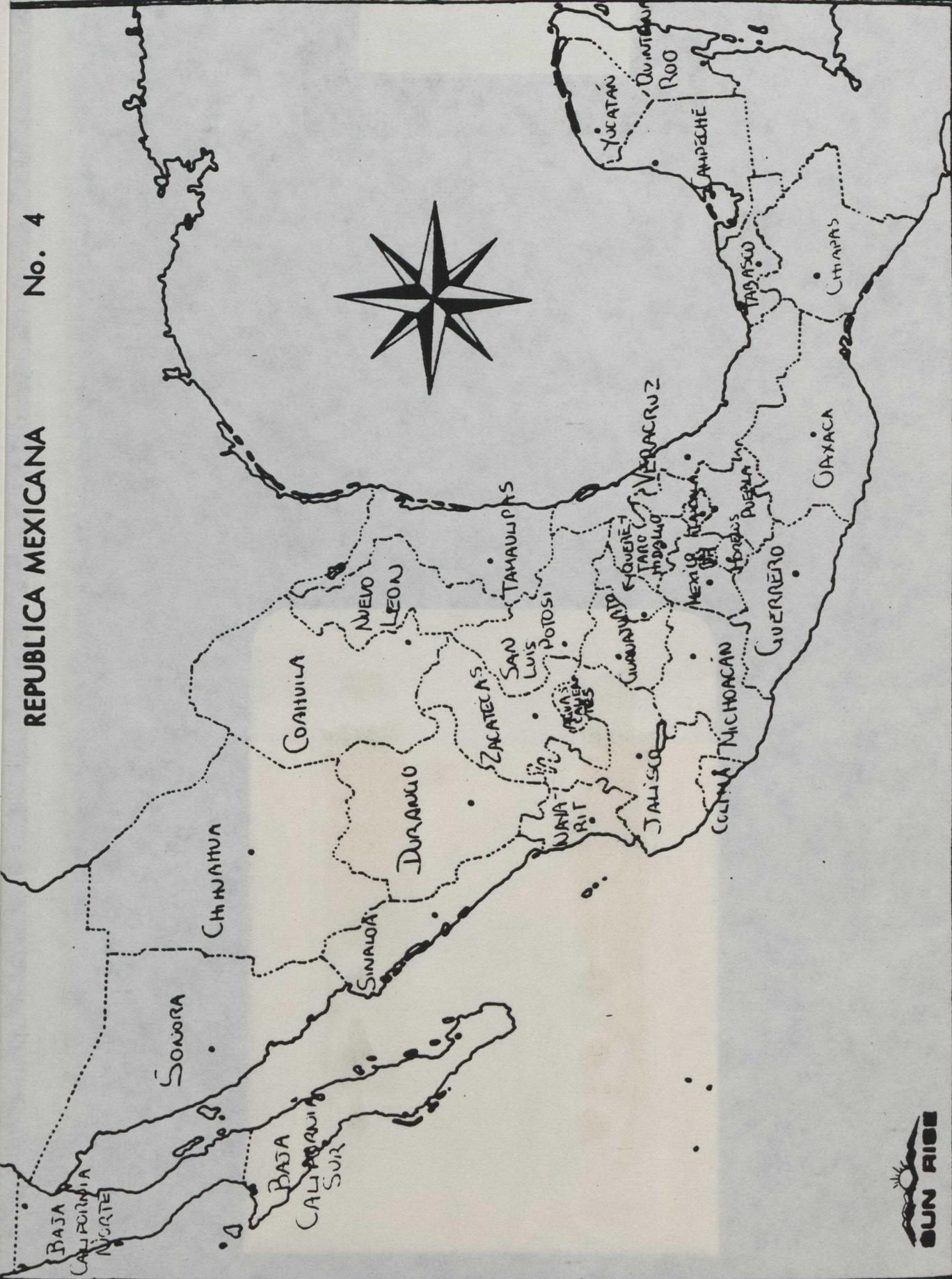
53070 Naucalpan, Estado de México

Phone: 359-5375 359-5365
358-4410 358-4266

Fax: 358-2229

Contact: Marta Lechuga

Large meat processor. Meat buyer.



JAMON SERRANO DE MEXICO S.A. de C.V.

Col. Narvarte
03020 Mexico
Phone: 538-6950
538-8350

Contact: José Luis Rueda
Raul Beravides
Pork buyer

FARMA/INAC
Ave. de las Puercas 41A 4o y 5o piso
Col. Lomas de Chapultepec
53950 Naucalpan, Estado de Mexico
Phone: 589-2400 589-2159
589-2149

RYC ALIMENTOS S.A. de C.V.
19 Oriente 19
Col. El Carden
Puebla, Pue.
Phone: (22) 23-8911 43-8937
Fax: (22) 23-8973
Contact: Ing. Florencio
Meat & offals buyer

SIGMA ALIMENTOS
Ernesto Padilla 2
Col. Industrial
55340 Ecatepec
Phone: 589-2159
Contact: Maria
Large meat processor
Rafael. Meat buyer

ZWANENBERG DE MEXICO
Estacas 34
53070 Naucalpan
Phone: 359-59
358-44
Fax: 358-22
Contact: Marta
Large meat processor

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DOCS
CA1 EA953 91M19 ENG
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for meat and livestock products
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