

Food and Beverage Processing and Packaging Equipment



THE OPPORTUNITY

The Mexican food processing industry offers many opportunities for Canadian suppliers of processing and packaging equipment for food and beverage products.

- Liberalized trade and a well-travelled middle class are driving an unprecedented demand for attractively-packaged convenience foods.
- Mexican food processors need to modernize and expand to meet the growing market, but generally lack the expertise and the capital to do so.
- Under the North American Free Trade Agreement (NAFTA), the cost of freezers and microwave ovens will fall, which will stimulate the market for convenience foods.
- There is a trend away from shopping at *abarrotes*, small corner stores, towards supermarkets and discount stores which usually do a better job of merchandising packaged convenience foods.
- Mexican food processors need to develop better packaging to compete with imported products from the United States, Europe and Chile.

In addition, more efficient processing and better packaging will be needed to take advantage of new export opportunities resulting from the devaluation of the peso.

AN INDUSTRY IN TRANSITION

Processed food markets are growing rapidly – but so is foreign competition. Processors will have to modernize and restructure to maintain their market share.

Mexico's food processing industry developed under an umbrella of protectionism, but the same government intervention that introduced protection also imposed price controls and kept the cost of capital high. The trade barriers that kept out foreign competitors also blocked imports of much-needed technology. Therefore, companies had neither the incentive nor the means to modernize.

In the late 1980s, the government launched a program of sweeping economic reforms, including trade liberalization, privatization and deregulation. The new policies opened up the economy to unprecedented competition. Mexican food processors were stuck with outdated equipment and insufficient capital, just as highly-efficient foreign competitors gained access to their market.

The availability of new imported products, coupled with the demands of a well-travelled and sophisticated middle class, has put pressure on food processors to develop new, attractively-packaged products to compete with these imports. Increasing demand for consumer-ready foods is expected to continue well into the next century. Mexican

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: Food and Beverage Processing and Packaging Equipment**. This market information on the Mexican market for food and beverage processing and packaging equipment has been researched by Townsend Trade Strategies Inc. 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:

InfoCentre
 Tel: 1-800-267-8376 or (613) 944-4000
 Fax: (613) 996-9709
 FaxLink: (613) 944-4500
 Bulletin Board (IBB): 1-800-628-1581 or (613) 944-1581

The market profiles are available in electronic form from the IBB and in hard copy at a cost of \$10.00 plus shipping and applicable taxes, from Prospectus Inc. Please contact:

Prospectus Inc., Order Department
 Tel.: (613) 231-2727
 Fax: (613) 237-7666

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Department of Foreign Affairs and International Trade Ministère des Affaires étrangères et du Commerce international



food processors are now restructuring in an effort to respond to this rapidly growing market.

The larger, better capitalized companies have been able to expand their markets and rationalize production through acquisitions. Some companies are building greenfield plants, often using technology from American or European partners.

Mexico's trade-oriented economy and changing demographics will have a dramatic impact on food processing in coming years. Under the North American Free Trade Agreement (NAFTA), prices for freezers and microwave ovens are expected to fall. There is a trend towards more modern forms of merchandizing, including supermarkets and discount stores. These factors are expected to increase demand for processed convenience foods. This will create opportunities for suppliers of all types of food processing equipment. The potential is particularly good for high-technology equipment not yet available from Mexican suppliers. The sharp devaluation of the peso that occurred in December 1994 will not diminish the need to modernize, but it will limit financing. Canadian joint venture partners who can bring their own capital will find many potential partners.

THE MEXICAN FOOD PROCESSING INDUSTRY

A handful of corporate giants dominate an industry that continues to include more than 40,000 micro-enterprises selling small volumes in their own neighborhoods.

About 8,000 food processing companies are registered with the *Cámara Nacional de la Industria de Transformación (CANACINTRA)*, Mexican Association of Manufacturers. According to association officials, there are more than 40,000 additional unregistered companies in the industry. These are

mostly small family-owned firms which market their products within a few blocks or a few kilometers of their facilities.

The industry is dominated by a few major players. Mexican family firms that have become industry leaders share shelf-space with a large number of American and European multinational brands. The multinationals typically work with a Mexican partner, or license their brands to Mexican firms.

INDUSTRY GROWTH

The Mexican food processing industry has grown steadily, even in the face of fluctuating economic conditions. The industry maintained growth throughout the so-called "lost decade" resulting from the 1982 debt crisis, and has adapted to periodic devaluations of the peso. The main forces driving demand for processed food are a rising total population and a growing middle class. Since 1988 the industry has also enjoyed an influx of foreign investment.

According to statistics from the *Instituto Nacional de Estadística, Geografía e Informática (INEGI)*, National Institute for Statistics, Geography and Informatics, the real GDP of the food industry, including beverages, rose by an average 2.7 percent annually in the five years which ended in 1991.

PRODUCT TRENDS

The leading Mexican food processors have adapted rapidly to the liberalized trade environment and emerging consumer demands. The better-capitalized companies have invested in new machinery and equipment. They automated their facilities, improved production efficiency, and increased the shelf-life of their products. New products, such as yoghurt drinks and cold cuts required advanced packaging and better distribution networks.

Smaller companies have generally been less successful. Many have been purchased by larger firms jostling for

market dominance. Others have had to close their doors. The *Cámara Nacional de la Industria de Transformación (CANACINTRA)*, Mexican Association of Manufacturers, estimates that it lost 20 percent of its food industry members in 1993 as a result of stronger competition and cheaper imports.

Processed Food Subsectors

- baked goods
- beverages
- canned goods
- confectionery and candy
- dairy products
- edible oils
- processed meats
- salty foods

FOOD PROCESSING AND PACKAGING EQUIPMENT

Mexico meets its own needs for basic equipment, but advanced technology is almost entirely imported.

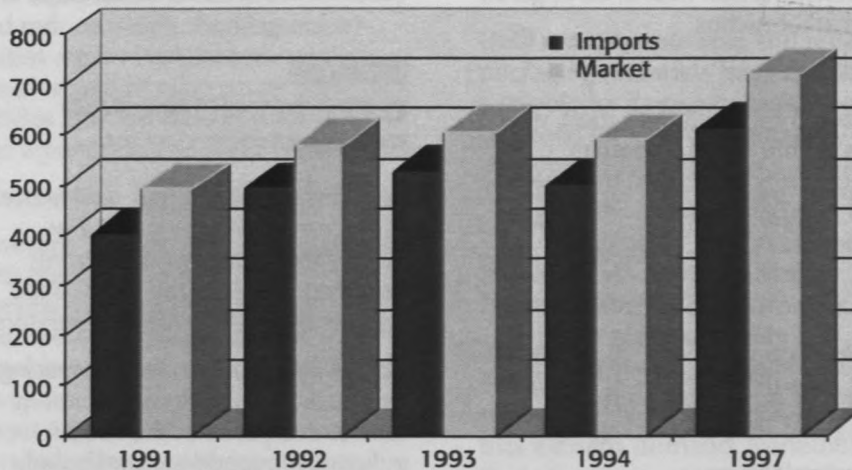
Foreign firms tend to supply the more sophisticated technology needs of the major food processors. Micro-enterprises depend mainly on low-technology equipment from domestic producers, but some shop around for reconditioned machinery from the United States.

In 1993, the Mexican market for food processing equipment amounted to US \$730 million. Import penetration has risen slowly but steadily over the past several years, from 83 percent in 1991, to 86 percent in 1993. Imports are forecast to exceed 87 percent of the market by 1997.

Domestic production of food processing equipment has been limited mainly to small-scale equipment based on simple technology. Mexican-made machinery is usually designed to handle only one step of a food-processing chain. It is common

Food Processing and Packaging Equipment

US \$ millions



Source: Information derived from *Secretaría de Comercio y Fomento Industrial (SECOFI)*, Secretariat of Commerce and Industrial Development, trade data and interviews.

for suppliers to specialize in custom-made equipment, rather than standard lines. These producers now face stiff competition from imports of medium-capacity mass-produced machines. These imports can be very price competitive, even considering the devalued peso.

The U.S. is the largest foreign supplier of food processing and packaging equipment to Mexico, with a 1993 import market share of 44 percent. Geographic proximity allows for fast delivery and service as well as the

ready availability of replacement parts. For these reasons, end users tend to be quite familiar with American-made equipment. Nonetheless, Germany and Italy each claimed a 15 percent import market share in 1993. Canada's share was about 2 percent.

CUSTOMERS

In almost every subsector, the top three or four producers claim 80 percent or more of the market. Small- and medium-sized enterprises compete for what is left.

BAKED GOODS

The baked goods industry is comprised of about 38,000 enterprises. Most are small family firms that supply a few city blocks with bread and tortillas, but most of the production is carried out by a few very large manufacturers. *Grupo Industrial Bimbo* and *Grupo Maseca* are two of the largest firms in Mexico. *Tablix*, a relative newcomer, is expanding in the south-east through acquisitions of regional bakeries. Conglomerates such as *Gamesa* (PepsiCo), *Nabisco*, and *Marinela*

LEADING FOOD PROCESSORS

US \$ millions

1992-93

Company	Sales
Grupo Industrial Bimbo	1,516
Compañía Nestlé	1,383
Anderson Clayton	474
Grupo Industrial Maseca	473
Sigma Alimentos	383
Herdez	292
Ganaderos Productores de Leche Pura	284
Agrobios	174
Lechera Guadalajara	130
Danone de México	124
Ingenio Tres Valles	109
Productos de Leche	96
Helados Holanda	89
Molinos Azteca	75
Corporación Azucarera de Tala	70
Derivados de Maíz Alimenticio	58
Laboratorios y Agencias Unidas	57
Ingenio Adolfo López Mateos	43
Others	1,323
Total	7,153

Source: *Expansión*. August 17, 1994.

(*Bimbo*), dominate the cake and cookie sector.

BEVERAGES

Mexicans consume more carbonated beverages per capita than any country except the United States. Coca-Cola is reputed to have about 55 percent of the market. Frozen juices are not as well developed due to the relative lack of freezer space.

The bottled water market is very crowded, with more than 40 brands competing for available shelf-space. Milk mixes from Procter and Gamble (*Chocomilk*), and Nestlé (*Quik*) have found a loyal customer base among young consumers. The market for beverage mixes prepared with water is dominated by Kraft.

The Mexican *Te La Pastora* shares the overall tea market with *McCormick* and *Laggs*. Most of the major American processed coffee brands can be found on supermarket shelves, and there is also a large market for roasted coffee beans.

Imports of Food Processing and Packaging Equipment, 1993

Category	US \$ thousands
heating and cooking	126,234
dairy	15,009
agricultural produce	10,861
bakery	42,023
confectionery and sugar	7,710
beverages	2,213
meat/poultry	14,075
other processing equipment	52,000
packaging	262,440
Total	532,565

Source: Derived from the *Banco Nacional de Comercio Exterior (BANCOMEXT)*, Mexican Trade Commission.

Mexican beer is produced by major brewers such as *Cervecería Moctezuma*, *Grupo Modelo* and *Cervecería Cuauhtémoc*. The latter firm is part of the food, beverage and packaging conglomerate *Valores Industriales*.

CANNED PRODUCTS

The two leading Mexican companies in the canned products subsector are *Herdez* and *La Costeña*. Other major players, including *Del Monte* and *Anderson Clayton*, are subsidiaries of multinationals. Some Mexican companies have established agreements for the exclusive representation or production of foreign product lines. For example, *Herdez* produces or imports for McCormick, Heinz, Knot's Berry Farm, American Home Food, and Hormel.

CONFECTIONERY AND CANDY

Major confectioners include *Cerezo*, *Del Angel*, *Elite*, *Nacional de Dulces* and *Turin*. The majority of chocolate manufacturers are regional, with only four major players — Nestlé, *Nacional de Dulces*, *Chocolatera de Jalisco*, and *Ricolino*. Two specialty companies, *Ferback* and *Turin*, cater to the high-end of the market.

Those confectioners intent on exporting have expanded their production facilities and are currently working on dual packaging projects, one for Spanish-speaking markets and another for American, Canadian and European consumers.

DAIRY PRODUCTS

The large multinational dairy products producers, including Nestlé, Carnation, Danone and Kraft are well represented in their respective markets, capturing about half of the total market for dairy products.

Yoghurt and cheese have been the most rapidly-growing processed products. Demand has risen sharply as a result of broadened tastes of the Mexican middle class. Milk drinks are also popular because they resemble the traditional *licuado* milk-shakes.

There is no tradition of "health foods" in Mexico, but low-calorie, low-fat dairy products are beginning to shape new consumption habits, carving out new market niches.

EDIBLE OILS

Mexicans fry a lot of their food, which makes edible oil an important subsector. It is estimated that there are 78 companies in this industry. They are located in 18 different states, mainly in central and northern Mexico. Because oil is considered a staple, it is given excellent shelf-space and is competitively priced. Equipment is needed both for bottling and for bulk packaging.

PROCESSED MEATS

Production of processed meats is dominated by five major firms: *Alimentos KIR*, *Donfer*, *Sigma*, *Parma* and *Zwanenberg*. They claim more than three-quarters of the total market. Meat processing tends to be accomplished with fairly basic equipment. Nonetheless, an emerging demand for packaged meats such as deli products and cold cuts is driving demand for more sophisticated systems.

SALTY FOODS

Street vendors selling all manner of quick snacks have a long tradition in Mexico. Recently, some of their market share has been eroded by the big snack food marketers. For example, PepsiCo sells snack foods under the *Sabritas* and *Frito-Lay* labels. Another major competitor is *Grupo Industrial Bimbo*, with the brand names *Barcel* and *Chips*.

The market leader is *Sabritas*, which employs more than 5,000 workers in plants that run at virtually full capacity. It faces stiff competition from *Barcel* which is also very effective in getting its product to market.

Peanut packagers have also managed to create their own market niche in mixed nuts, with little competition from outside. *Mafer* claims 60 percent of the available shelf-space, followed by *Sabritas*. Other leading

peanut packagers, *Nipon* and *Martín Cubero* have excellent distribution systems, but do not achieve sales volumes comparable to *Mafer's*.

OPPORTUNITIES FOR EQUIPMENT SALES


Processing, packaging and waste reprocessing are opportunity areas for Canadian companies than can cater to the specialized needs of Mexican food processors.

Market opportunities for processing and packaging equipment exist in almost every area of the food industry. Prospects are particularly good in the quick-freezing and packaging sector. This niche has largely been ignored so far, because of a relative lack of home freezing units. Under the North American Free Trade Agreement (NAFTA), home freezers are expected to become much more widely available. Waste reprocessing equipment is also of particular interest to Mexican food processors.

Food packaging will also provide interesting opportunities. If Mexican consumer-ready products are to hold their markets against foreign competitors, they must adapt to more sophisticated packaging. For instance, eye-catching, brightly coloured wrappers on candy imported from Chile is currently taking market share from Mexican products. New packaging techniques which help to extend the shelf-life of products are also needed.

BAKED GOODS

Processing and packaging equipment used by the larger distributors has traditionally been based on medium-level technology. Now, in response to rising demand for wheat-based products and the need for longer, more automated production runs, the larger firms are beginning to shop for state-of-the-art equipment. Packaging equipment is also in demand in the high end of the bakery subsector.



Micro-bakeries are struggling to adapt to the recent elimination of flour subsidies. They must now invest in new equipment to increase efficiency and reduce waste. Packing opportunities are limited, however, since bread is sold in plain paper bags, and tortillas in brown paper or directly into a purchaser's cloth napkin.

BEVERAGES

Beverage packaging is fairly standard, with brand name products being marketed in bottles or cans. Juices and nectars are regularly merchandised in one-litre and 250-millilitre tetrapaks, and in one-litre bottles. About 80 percent of all soft drinks are purchased in reusable containers.

CANNED PRODUCTS

Mexican-made equipment for canned food processing accounts for between 40 percent to 50 percent of the market. Imports tend to fill market niches, ranging from large-volume, high-efficiency machines, to smaller-scale, semi-automatic equipment.

There is also a healthy import market for used and rebuilt equipment from the U.S. and Canada. This less-sophisticated equipment meets the needs of many small- and medium-sized firms, where servicing can often be done by in-house technicians.

CONFECTIONERY AND CANDY

There is growing recognition that the confectionery and candy subsector needs to upgrade its packaging. Industry watchers say this subsector is 10 to 15 years behind its competition. Domestic processing and packaging equipment consists mainly of sugar mixers and medium-technology packaging equipment. Some packaging is still done by hand. Imported products include cleaners, predryers, roasters, presses, refiners and pulverizers.

DAIRY PRODUCTS

Few domestic equipment manufacturers are in a position to supply the large dairy companies with

the highly sophisticated equipment they need. Almost all of their equipment is imported from the U.S. or Europe.

Until recently, reusable and recyclable packaging materials have not been available for dairy products. However, the need for environmentally-appropriate packaging is gradually becoming understood, and there will be growing demand for such products in the future.

EDIBLE OILS

The edible oil subsector is unusual because it uses state-of-the-art technology and has an installed capacity that exceeds demand. Nonetheless, there are some opportunities for packaging equipment suppliers. Advanced packaging materials and labellers are among the more promising prospects.

Milling equipment typically comes from the U.S., while the equipment used for refining and secondary production is imported from Italy, Germany and the U.S.. *Fábrica de Jabón la Corona* recently purchased equipment from Husky, a Canadian company.

PROCESSED MEAT

Competition from imported processed meat producers is challenging domestic suppliers to import more efficient technology that can lower production costs. The equipment market is driven by strong price competition, strict sanitary requirements, and a demand for less labour intensive processes. More sophisticated equipment and storage facilities can satisfy all three of these needs.

In order to export, meat processors must first get their plant accredited as a *Tipo Inspección Fiscal (TIF)* plant, which means it complies with high sanitary and production standards. Equipment is typically changed every five-to-ten years, fuelling demand for high technology equipment from foreign suppliers.

SALTY FOODS

Except for the very large producers, Mexican salty food manufacturers tend to use medium-level technology. Since this is a very image-conscious industry, there are major opportunities in packaging. Plant managers are looking for multi-tasking equipment that can weigh, fill and pack in one production run.

MARKET ENTRY STRATEGIES

A local presence is essential and a Mexican agent or partner is a good way to get established. However, it takes time to understand the market and its players

ESTABLISHING A LOCAL PRESENCE

Canadian firms that have been active in Mexico stress that a local presence is essential for success. This can mean retaining the services of a Mexican representative, agent or subcontractor, or establishing a strategic partnership with a Mexican producer. Alternatively, a Canadian company may open its own office in Mexico. No matter what approach is chosen, it is important to demonstrate a commitment to the market and assure clients that after-sales service will be available.

Distributors are commonly found through contacts made at food industry trade shows. Many experienced distributors are members of regional or industry associations. These associations can be important contact points for finding qualified distributors or disseminating information on new products.

THE REGULATORY ENVIRONMENT

Few barriers stand in the way of Canadian equipment producers who want to move into Mexico.

Annual Food Industry Trade Shows

Trade show	Products	City
CONFITEXPO	confectionery	Mexico City
EXPO ALIMENTOS	foods, raw materials, machinery	Monterrey
EXPO PAN	bakery	Mexico City
EXPO CANILEC	milk and dairy	Mexico City
EXPOPAK	packaging	Mexico City

PRODUCT STANDARDS

There are no mandatory standards for food processing and packaging machinery. However, industry watchers predict the introduction of approval requirements by the *Dirección General de Normas (DGN)*, Bureau of Standards, that falls under the umbrella of the *Secretaría de Comercio y Fomento Industrial (SECOFI)*, Secretariat of Commerce and Industrial Development.

Products that meet Canadian, European or American standards are unlikely to be the subject of certification problems. Inquiries on Mexican standards can be made with the *DGN* in Mexico City (see Key Contacts in Mexico). Mexican product specifications must be submitted in metric units.

SANITARY AND SAFETY REQUIREMENTS

The *Secretaría de Salud (SS)*, Secretariat of Health, is working on new sanitary regulations. Unusually stringent standards are not expected.

Potentially hazardous equipment such as pressure vessels must be registered and approved by the *Secretaría de Trabajo y Previsión Social (STPS)*, Secretariat of Labour and Social Welfare. The Secretariat will issue a Certificate of Inspection. Compliance with the more stringent American, Canadian and European standards is usually sufficient to ensure certification.

Mexico adheres to the International System of Units (SI). Importers will usually require metric labelling for packaged goods. Dual labelling is acceptable.

Electrical voltage is the same as in Canada. Electric power is 60 cycles, with normal voltage of 110, 200 and 440 volts with a frequency of 60 Hz. Three-phase and single-phase 230 volt current is also available. Sixty-cycle, 115/120 volts is the norm throughout Mexico, including industrial machinery. Power supply for industrial operation is 440 volts, three-phase, 60-cycle.

The high altitudes of many major plant locations may necessitate changes to some industrial processes, machinery and packaging.

KEY CONTACTS

CANADA

Canadian Government

Department of Foreign Affairs and International Trade (DFAIT) is the Canadian federal government department most directly responsible for trade development. The **InfoCentre** is the first contact point for advice on how to start exporting. It provides information on export-related programs and services; helps find fast answers to export problems; acts as the entry point to DFAIT's trade information network; and can provide companies with copies of specialized export publications.

InfoCentre

Tel.: 1-800-267-8376 or
(613) 944-4000

Fax: (613) 996-9709

FaxLink: (613) 944-4500

InfoCentre Bulletin Board (IBB):

Tel.: 1-800-628-1581 or
(613) 944-1581

Commercial Division of the Embassy of Canada in Mexico City promotes trade with Mexico. There are several trade commissioners at the Embassy, and there is a satellite office in Monterrey. Trade commissioners can provide a range of services including introducing Canadian companies to potential customers in Mexico; advising on marketing channels; assisting those wishing to participate in trade fairs; helping identify suitable Mexican firms to act as agents; and compiling credit and business information on potential foreign customers.

Note: to telephone Mexico City, dial: 011-52-5 before the number shown below. For contacts in other cities in Mexico, consult the international code listing at the front of your local telephone directory for the appropriate regional codes, or contact the international operator.

Commercial Division

The Embassy of Canada in Mexico
Schiller No. 529
Col. Polanco
Apartado Postal 105-05
11560 México, D.F.
México
Tel.: 724-7900
Fax: 724-7982

Canadian Business Centre
Centro Canadiense de Negocios
Av. Ejército Nacional No. 926
Col. Polanco
11540 México, D.F.
México
Tel.: 580-1176
Fax: 580-4494

Canadian Consulate
Edificio Kalos, Piso C-1
Local 108-A
Zaragoza y Constitución
64000 Monterrey, Nuevo León
México
Tel.: 344 3200
Fax: 344-3048

International Trade Centres have been established across the country as a convenient point of contact to support the exporting efforts of

Canadian firms. Co-located with the regional offices of the Department of Industry (DI), 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 marketing research and market planning; provide access to government programs designed to promote exports; and arrange for assistance from the Trade Development Division 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 the capabilities, experience and interests of more than 30,000 Canadian exporters. To register on WIN Exports, call: (613) 996-5701.

Market Intelligence Service provides Canadian businesses with detailed market information on a product-specific basis. The service assists Canadian companies in the exploitation of domestic, export, technology transfer, and new manufacturing investment opportunities. The intelligence is used by Canadian businesses in decisions regarding manufacturing, product development, marketing, and market expansion. The information includes values; volume and unit price of imports; characteristics of specific imports (e.g. material, grade, price range, etc.); names of importers; major countries of export; identification of foreign exporters to Canada; Canadian production; Canadian exports; and American imports. Two-thirds of the clientele for this service are small businesses. Call: (613) 954-4970.

Canadian International Development Agency (CIDA) is an important possible source of financing for Canadian ventures in Mexico. A special fund is available through the CIDA under the Industrial Cooperation Program or CIDA/INC.

CIDA's Industrial Cooperation 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. INC supports the development of linkages with the private sector in Mexico by encouraging Canadian enterprises to share their skills and experiences with partners in Mexico and other countries. A series of INC mechanisms help enterprises to establish mutually beneficial collaborative arrangements for the transfer of technology and the creation of employment in Mexico.

Industrial Cooperation Division
Canadian International Development Agency
200, Promenade du Portage
Hull, PQ K1A 0G4
Tel.: (819) 997-7905/7906
Fax: (819) 953-5024

Export Development Corporation (EDC) is a unique financial institution that helps Canadian business compete internationally. EDC facilitates export trade and foreign investment by providing risk management services, including insurance and financing, to Canadian companies and their global customers.

EDC's programs fall into four major categories:

- export credit insurance, covering short and medium-sized credits;
- performance-related guarantees and insurance, providing coverage for exporters and financial institutions against calls on various performance bonds and obligations normally issued either by banks or surety companies;
- foreign investment insurance, providing political risk protection for new Canadian investments abroad; and
- export financing, providing medium- and long-term export financing to foreign buyers of Canadian goods and services.

Ottawa (Head Office):
151 O'Connor Street
Ottawa, ON K1A 1K3
Tel.: (613) 598-2500
Fax: (613) 237-2690

International Financing Institutions, including the World Bank and the Inter-American Development Bank, provide funds to Mexico for a wide variety of specific projects. These banks can provide details of upcoming projects and identify the Mexican executing agencies.

Embassy of Mexico, Mexican trade commissioners in Canada, and Mexican consulates can provide assistance and guidance to Canadian companies in need of information about doing business in Mexico.

Embassy of Mexico
45 O'Connor Street
Suite 1500
Ottawa, ON K1P 1A4
Tel.: (613) 233-8988
Fax: (613) 235-9123

SPONSORING ORGANIZATIONS

**Baker & McKenzie
Barristers & Solicitors**
BCE Place
181 Bay Street
Suite 2100
Toronto, ON M5J 2T3
Tel.: (416) 865-6910/6903
Fax: (416) 863-6275

Business and Professional Associations

**Machinery and Equipment
Manufacturers' Association of
Canada**
116 Albert Street
Suite 701
Ottawa, ON K1P 5G3
Tel.: (613) 232-7213
Fax: (613) 232-7381

The Canadian Council for the Americas is a non-profit organization formed in 1987 to promote business interests in Latin American and Caribbean countries. The CCA promotes events and programs targeted at expanding business and building networking contacts



between Canada and the countries of the region. It also publishes a bimonthly newsletter.

The Canadian Council for the Americas

Executive Offices
145 Richmond Street West
Third Floor
Toronto, ON M5H 2L2
Tel.: (416) 367-4313
Fax: (416) 367-5460

Canadian Exporters' Association

99 Bank Street
Suite 250
Ottawa, ON K1P 6B9
Tel.: (613) 238-8888
Fax: (613) 563-9218

Canadian Manufacturers' Association

75 International Boulevard
Fourth Floor
Etobicoke, ON M9W 6L9
Tel.: (416) 798-8000
Fax: (416) 798-8050

The Canadian Chamber of Commerce

55 Metcalfe Street
Suite 1160
Ottawa, ON K1P 6N4
Tel.: (613) 238-4000
Fax: (613) 238-7643

Forum for International Trade and Training Inc. (FITT Inc.)

155 Queen Street, Suite 608
Ottawa, ON K1P 6L1
Tel.: (613) 230-3553
Fax: (613) 230-6808

Language Information Centre

240 Sparks Street RPO
Box 55011
Ottawa, ON K1P 1A1
Tel.: (613) 523-3510

Canadian Freight Forwarders Association

Box 929
Streetsville, ON L5M 2C5
Tel.: (905) 567-4633
Fax: (905) 542-2716

Open Bidding Service

P.O. Box 22011
Ottawa, ON K1V 0W2
Tel.: 1-800-361-4637 or
(613) 737-3374

Canadian Standards Association

178 Rexdale Blvd.
Rexdale, ON M9W 1R3
Tel: (416) 747-4000
Fax: (416) 747-4149

Standards Council of Canada

45 O'Connor Street
Suite 1200
Ottawa, ON K1P 6N7
Tel.: (613) 238-3222
Fax: (613) 995-4564

KEY CONTACTS

MEXICO

Mexican Government

Secretariat of Commerce and Industrial Development

Secretaría de Comercio y Fomento Industrial (SECOFI)
Dirección General de Servicios al Comercio Exterior
Alfonso Reyes No. 30, Piso 10
Col. Hipódromo Condesa
06170 México, D.F.
México
Tel.: 729-9256/9257
Fax: 729-9343

Secretariat of Commerce and Industrial Development Bureau of Standards

Secretaría de Comercio y Fomento Industrial (SECOFI)
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53950 Tecamachalco, Estado de México
México
Tel.: 729-9300
Fax: 729-9477

National Institute for Statistics, Geography and Informatics

Instituto Nacional de Estadística, Geografía e Informática (INEGI)
Edificio Sede
Av. Héroe de Nacosari No. 2301 Sur
Fraccionamiento Jardines del Parque
20270 Aguascalientes, Aguascalientes
México
Tel.: 918-6947
Fax: 918-6945

National Council for Low-Income Food Support

Compañía Nacional de Subsistencias Populares (CONASUPO)
Av. Insurgentes No. 489, Piso 4
Col. Hipódromo Condesa
06100 México, D.F.
México
Tel.: 272-2614/0472, 271-1131
Fax: 272-0607

Secretariat of Labour and Social Welfare

Secretaría del Trabajo y Previsión Social (STPS)
Periférico Sur No. 4271, Edificio A
Col. Fuentes del Pedregal
14140 México, D.F.
México
Tel.: 568-1720, 645-3969/5466
Fax: 645-5466

Secretariat of Health

Secretaría de Salud (SS)
Lleja No. 7, Piso 1
Col. Juárez
06600 México, D.F.
México
Tel.: 553-7670
Fax: 286-5497

BUSINESS AND PROFESSIONAL ASSOCIATIONS

National Chamber of the Preserved Foods Industry

Cámara Nacional de la Industria de Conservas Alimenticias (CANAINCA)
Calderón de la Barca No. 359-200
Col. Polanco
11560 México, D.F.
México
Tel.: 531-5939, 250-8929, 203-3987
Fax: 203-9798

National Chamber of the Oils, Greases and Soaps Industry

Cámara Nacional de la Industria de Aceites, Grasas y Jabones
Melchor Ocampo No. 193, Torre A,
Piso 8
Col. Verónica Anzures
11300 México, D.F.
México
Tel.: 260-6925
Fax: 260-6589

National Chamber of the Beer Industry

Cámara Nacional de la Industria de la Cerveza y de la Malta
Horacio No. 1556
Col. Chapultepec Morales
11570 México, D.F.
México
Tel.: 280-9850/9852
Fax: 280-0201

National Chamber of the Perfume and Cosmetics Industry

Cámara Nacional de la Industria de Perfumería y Cosmética
Gabriel Mancera No. 1134
Col. del Valle
03100 México, D.F.
México
Tel.: 575-1883, 559-9018
Fax: 575-2121

National Chamber of the Tortilla Production Industry

Cámara Nacional de la Industria de Producción de Masa y Tortilla (CNIPMT)
av. Juárez No. 97-401
Col. Centro
06040 México, D.F.
México
Tel.: 510-0850, 518-3240

National Chamber of the Restaurants and Seasoned Foods Industry

Cámara Nacional de la Industria de Restaurantes y Alimentos Condimentados
Aniceto Ortega No. 1009
Col. del Valle
03100 México, D.F.
México
Tel.: 604-3546, 688-9378
Fax: 604-4086

Mexican Association of Manufacturers

Cámara Nacional de la Industria de Transformación (CANACINTRA)
Av. San Antonio No. 256
Col. Ampliación Nápoles
03849 México, D.F.
México
Tel.: 563-3400/0510
Fax: 598-5888, 611-0633

National Chamber of Commerce of Mexico City

Cámara Nacional de Comercio de la Ciudad de México (CANACO)
Paseo de la Reforma No. 42

Col. Centro
06048 México, D.F.
México
Tel.: 592-2677/2665
Fax: 592-3571

National Chamber of the Milk Industry

Cámara Nacional de Industriales de la Leche (CANILEC)
Benjamín Franklin No. 134
Col. Escandón
11800 México, D.F.
México
Tel.: 271-2100/3848
Fax: 271-3798

National Chamber of the Pharmaceutical Industry

Cámara Nacional de la Industria Farmacéutica
Av. Cuauhtémoc No. 1481
Col. del Valle
033610 México, D.F.
México
Tel.: 688-9477/9817
Fax: 604-9808

National Chamber of the Bakery Industry

Cámara Nacional de la Industria Panificadora
Dr. Liceaga No. 96
Col. Doctores
06220 México, D.F.
México
Tel.: 578-9277
Fax: 761-8924

National Chamber of the Fishing Industry

Cámara Nacional de la Industria Pesquera
Manuel María Contreras No. 133-401
Col. Cuauhtémoc
06500 México, D.F.
México
Tel.: 566-9411, 546-5234
Fax: 705-1102

National Chamber of the Sugar and Alcohol Industries

Cámara Nacional de las Industrias Azucarera y Alcohólica
Río Niágara No. 11
Col. Cuauhtémoc
06500 México, D.F.
México
Tel.: 533-3040 through 49
Fax: 511-7803, 207-6592

National Chamber of Processed Corn

Cámara Nacional del Maíz Industrializado
Londres No. 39-101
Col. Juárez
06600 México, D.F.
México
Tel.: 514-1220, 533-0704
Fax: 533-0704

National Council of Cold-Meat Packers

Consejo Nacional de Empacadores de Carnes Frías y Embutidos
Miguel Angel de Quevedo No. 350
Col. Coyoacán
04000 México, D.F.
México
Tel.: 658-1120/8347
Fax: 658-3688

Trade Shows

CONFITEXPO
Av. Baja California No. 32-A
Col. Roma
06760 México, D.F.
México
Tel.: 564-0329
Fax: 564-0329

EXPO ALIMENTOS
Av. Fundidora No. 501
Primer Nivel, Local 22
Col. Obrera
64010 Monterrey, Nuevo León
México
Tel.: 369-6660/6969
Fax: 369-6660

EXPO PAN
Congresos, Exposiciones y Promociones, S.A.
José María Bustillos No. 49
Col. Algarín
06880 México, D.F.
México
Tel.: 519-6600
Fax: 538-8679

EXPO CANILEC
National Chamber of the Milk Industry
Cámara Nacional de Industriales de la Leche (CANILEC)
Benjamín Franklin No. 134
Col. Escandón
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Tel.: 271-2100/2884
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CA1 EA612 95F51 ENG

Food and beverage processing and
packaging equipment. --

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