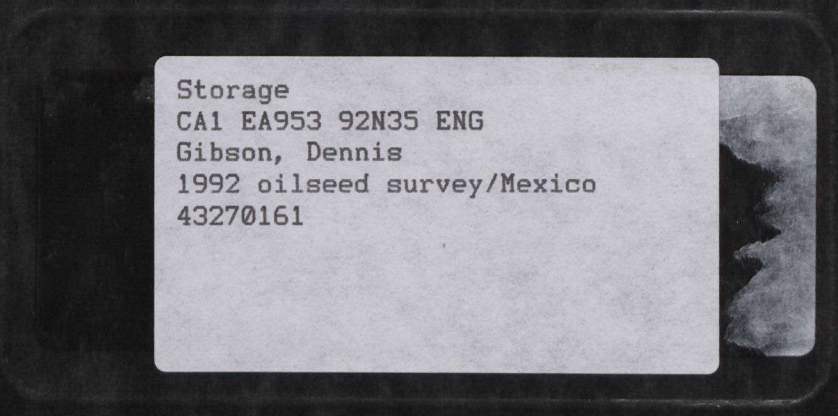

1992 OILSEED SURVEY/MEXICO

Prepared by

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Mexico City

August 28, 1992

OILSEED SURVEY

(1) CONSUMPTION

(a) Human Nutrition

- Vegetable oils and fats per capita consumption in 1991 was estimated at 19.3 Kg. Total fats and oils consumption in 1991 is estimated at 1.6 million tonnes broken down as follows:

  24% animal fats, 76% vegetable fats of which 40% are consumed in solid form.

- Consumer preference even amongst middle and upper income class is based on price and habit. The most commonly consumed oil is a blend of soya, palm and canola oil. This blend is variously described as vegetable oil, cartamo or sunseed oil. Consumption level of domestically produced sesame seed oil, because of its prices, is very low.

- Although health concerns are becoming more evident, the Mexican market continues to be very price sensitive with price, rather than health, being the main factor in purchasing decisions both at processor and retail levels.

- No information of soyfood products (tofu, etc.) per capita consumption, although it would be very small.

- No human consumption of flaxseed or flaxseed products in Mexico.

b) Protein meals

Size of and growth pattern of Livestock Industry

	Cattle	Hogs	Sheep	Goats	Chicken		Turkeys
	Millions of Head				(For eggs)	(For meat)	
1987	34.6	18.7	10.4	5.9	118.4	105.5	8.9
1988	33.8	15.9	10.1	5.8	115.4	118.6	8.8
1989	33.0	16.2	10.2	5.9	119.1	119.2	7.1
1990	32.0	15.2	10.4	5.8	115.2	118.8	7.0
1991 (Est)	31.9	15.9	10.7	6.0	106.6	124.8	6.8

Consumption of protein meals has increased from an estimated 1.8 million tonnes in 1984 to about 2.7 million tonnes in 1991.

Proportion of Protein Meal Use

Poultry	Swine	Dairy	Beef	Aquaculture
35%	30%	24%	10%	1%

- Soymeal still dominates the market (66%) although it has been displaced to some extent by lower cost meal extracted from canola and cottonseed.

The meal extracted from the 297,000 tonnes of double zero canola-type rapeseed imported from Poland in 1991 was all utilized as animal feed.

- The meal market is very price sensitive and although soyameal is the preferred feed, rapeseed meal is very acceptable to the feed manufacturing and livestock industry, particularly when it is price competitive. Since rapeseed is imported for its oil, rapemeal is priced attractively and competitively with soymeal by Mexican crushers/refiners to the feed manufacturing industry to ensure its disposal.

The small amount of flaxmeal that is utilized as animal feed is used as an ingredient in compound feed for horses. It apparently imparts a gloss to the horses coat.

c) Industrial Utilization

Domestic flaxseed production is estimated at less than 3,000 tonnes per annum. Annual imports of oil and seed fluctuate significantly. In 1991 only .3 million tonnes of flaxseed and 1.8 of linseed oil were imported, with utilization of the crushed and imported oil being roughly divided amongst the production of oil based paints, fatty acids for plasticizers and linoleum. Both soybean and rapeseed oil have displaced to some degree the use of linseed oil in printing inks. There is no use of rapeseed oil in plastics, fuels or lubricants. The bulk of vegetable oil production is used as edible oil with a small proportion used in the production of detergents, soap, cosmetics and, in the case of flaxseed, paint, plasticizers and linoleum. In 1992 severe crop damage caused by flooding during the spring-summer cycle, will reportedly result in a significant reduction in harvest volumes from last year i.e. some estimates are less than 1 million tonnes.

(2) PRODUCTION POLICIES

Production Subsidy Programs and Domestic Pricing Policy

The primary government program for stimulating production since 1953 has been the use of guaranteed prices. Soybeans, safflower, cottonseed, sesame and copra were included in the guarantee price policy in 1971. The guaranteed price for soybeans was modified every 15 days during marketing period basis world prices.

With the exception of corn and beans, all guaranteed prices were eliminated in 1989. For soybeans, the guaranteed price was retained but in a different form. In 1989 and 1990 the guaranteed price was based on the Chicago Board of Trade (CBOT) cash price plus US$22.80 (the transportation cost to Mexico) plus 11%.

Commencing with the 1991-92 crop the guaranteed price for soybeans was replaced by a "commercialization price" (which the processor must pay for his domestic supplies) negotiated each year by the processors, growers and the government, based on the growers production cost (900-920,000 pesos/tonne in 1992). The processor is reimbursed, by the Secretaría de Agricultura y Recursos Hidráulicos/ASERCA, the difference between his purchase cost (the growers production cost) and the theoretical landed cost in Mexico of imported soybean (the CBOT cash price and freight, insurance, duties and taxes)

In the case of soybeans, in 1990 and 1991, the government increased the customs duty from 0 to 15% during the harvesting and marketing period (Aug 1 to Jan 31) to strengthen the domestic price for growers.

With the elimination on January 12, 1992 of the agreed retail price control on corn oil all vegetable oils, corn and fats are now free of price controls and are allowed to freely fluctuate basis supply and demand and in competition with each other. Retail prices in August 1992 in a Mexico City supermarket were as follows:

Olive oil	19,990 pesos/946 ml
Corn oil	4,720 pesos/litre
Cartamo (safflower) oil	3,250-3,930 pesos/litre
Sunflower oil	2,990-3,100 pesos/litre
Blended vegetable oil (incl canola)	2,590-3,050 pesos/litre

(Exchange rate X .000389)

(3) DOMESTIC INDUSTRY INFRASTRUCTURE

A) General:

The degree of industry technical expertise is considered to be marginally adequate. There is not considered, by the industry, to be any serious processing, handling or storage facility constraints.

The marketing infrastructure is a mix of totally vertically integrated private firms encompassing the operations of crushing, refining, packing, bottling and distributorship to retail and industrial outlets and a few firms performing a combination i.e. crushing/refining or only one of the foregoing functions. The trend is to fully integrated firms with most of the firms that only crush gradually disappearing. As well, there is a growing trend to importation of crude oil for refining. Vegetable oil for human consumption is marketed in Mexico through various types of retail outlets ranging from North American style super markets and convenience stores to small tiendas and government Conasupo stores supplying basic foodstuffs in the poorer urban and rural areas. Industrial users/processors also account for a large proportion of consumption.

The main industry association grouping fourteen of the largers crushers/refiners and 70% of capacity is the:

Consejo de la Industria Aceitera Mexicana, S.C.
Lord Byron No. 706
Col. Bosque de Chapultepec
11580 México, D. F.
Tel: (011-525) 281-797/281-3630
Fax: (011-525) 281-1462
Director General: Lic. Miguel Machuca López

Other associations are:

Asociación Nacional de Industriales de
Aceites y Mantecas Comestibles
(oils and foodstuffs industries)
Praga No. 39, 3er piso
Col. Juárez
06600 México, D. F.
Tel: (011-525) 533-2847/2859/5257546-50

Fax; (011-525) 525-5124
President: Lic. Enrique García Gámez

Cámara Nacional de la Industria de Aceites, Grasas y Jabones
(oils, greases and soaps industries)
Melchor Ocampos No. 193, A-801
Verónica Anzures
11300 México, D. F.
Tel: (011-525) 260-6589
Fax: (011-525) 260-6925
Presidente: Antonio González Ortiz

b) Crushing and Refining Industry Infrastructure

Because of the highly integrated nature of the industry, the crushing and refining section are treated jointly in this report. Crushing capacity is estimated at 5.95 million tonnes (with less than 50% utilization) while refining capacity is estimated at 1.3 million tonnes. The 78 crushing plants (20 are not operational) and 35 refining plants are operated by 45 independent firms and subsidiaries of holding companies or "grupos". The largest of these are Grupo AGYDSA-Patrona; Hidrogenadora Nacional; Anderson Clayton & Co. (A&C is not operating its oilseeds crushing plants; it is only refining imported crude oil); Grupo El Zapote - La Junta; RAGASA; Grupo Industrial Aceitera; Oleaginosas del Sureste, S.A. de C. V.; Productos de Maíz, S. A., and Arancia.

All of the industry is privately owned. With the exception of such firms as Anderson Clayton and Productos de Maíz, S. A., which are subsidiaries of American firms, most of the industry is privately owned by Mexican interests.

c) Compound Feed Industry Infrastructure

The industry is comprised of 53 privately owned (including some cooperatives) manufacturers of "alimentos balanceados" with a total of 89 plants and 18 manufacturers/suppliers of feed supplements and ingredients.

Compound milling capacity is estimated at 7250 tonnes per month while current output is estimated at 6,500 tonnes per month.

Purina, S.A. de C. V., Av. Reforma No. 295 -25, 06500 México, D. F., a subsidiary of the U.S. Ralston Purina firm, is estimated to have about one-third of the commercial

compound feed market, Malta, S. A., Av. Universidad No. 2069 Nte., Monterrey, N.L., is estimated to have one quarter of the market; La Hacienda, S.A. de C.V., Homero No. 1804, Col. Los Morales, 11510 México, D. F., 15%; and Anderson Clayton & Co., Jaime Balmes No. 11, Torre C, Plaza Polanco, Col. Polanco, 11510 México, D. F., 10%. The latter firm is a subsidiary of a British (Lever Bros.) firm. The integrated livestock sector also produces about 2 million tonnes of feed per year of its own use in feed mills operated by large livestock and poultry producers and some regional and state livestock producers associations. An example is the Bachoco, El Trasgo y El Calvario (it operates its own soymill) firms which are the largest egg and broiler producers in Mexico with a feed milling capacity of close to 100,000 tonnes/month each.

The trend is strongly towards the production of feed by the livestock and poultry producers with a corresponding decline each year in the market share of the feed manufacturing firms such as Purina.

d) Others

There are an estimated seven producers of vegetable shortening and five margarine producers in Mexico. The main firms respectively are Anderson Clayton & Co., Jaime Balmes No. 11, Torre C, Plaza Polanco, Col. Polanco, 11510 México, D. F., and Hidrogenadora Nacional, Clave 444, Col. Vallejo, México, D. F.

No information is available on plant capacity nor production.

None of the soyfood products listed in the questionnaire are manufactured in Mexico. Soyoil, soya paste, soya milk substitute and soya drinks, soya flour and texturized soya protein are the only known soyabean food products known to be produced in Mexico.

There are five known companies involved in the production of vinyl and plastic floor coverings including linoleum. The largest firms are:

Losetas Asfálticas
Canela No. 238
Col. Granjas México
México, D. F.
Fax: (011-525) 657-9989

Irving, S.A. de C.V.
Prol. Sur 128, No. 134
México, D. F.
Tel: (011-525) 271-5471

Pivide, S.A. de C.V.
Kepler No. 128
México, D. F.
Tel: (011-525) 545-7565

There are only two linseed mills: Aceitera de Occidente, in Guadalajara and Aceites Polimerizados in Mexico City.

The linseed oil imported or produced in Mexico is utilized in the manufacture of paint, plasticizers, linoleum and inks. There are about fifteen manufacturers of paints, varnishers and resins in mexico. The largest are:

Pinturas Pittsburg de México, S.A. de C.V.
Av. Presidente Juárez No. 1978
54090 Tlalnepantla, Méx.
Tel: (011-525) 397-822

Dupont, S. A. de C. V.
Homero No. 206
Apdo. Postal 5831
Col. Chapultepec Morales
Del. Miguel Hidalgo
11570 México, D. F.
Tel; 250-9033

Compañía Sherwin Williams
Poniene 140 No. 595
Col. Industrial Vallejo
Del. Atzcapotzalco
México, D. F.
Tel: (011-525) 587-1933

Comercial Mexicana de Pinturas
Campos Elíseos 400
Col. Lomas de Chapultepec
Del. Miguel Hidalgo
11000 México, D. F.
Tel: (011-525) 202-0326

Grupo ICI México
San Lorenzo No. 1009
Col. del Valle
Del. Benito Juárez
03100 México, D. F.
Tel: (011-525) 688-5344

4) TRADE POLICIES

a) Imports

Oilseeds for crushing and refining and crude and refined oil are imported directly by the user i.e. the oilseed processing firm or the vegetable oil refiner/packer.

Although oilseeds and products were removed from the exclusive import control of Conasupo in the early 1980s, importers continue to require phytosanitary "authorization" for imports from the Ministry of Agriculture (SARH). The rationale for the requirement is to protect the domestic soybean producer.

The Mexican government has for the last two years raised the customs duty from zero to 15% (10% in 1990) for the period August 1st to Jan 31st to facilitate the marketing of the Mexican soybean crop at a more remunerative price return for the soybean producer.

The NAFTA when implemented will pressumably eliminate this informal seasonal tariff mechanism and replace it with a tariff rate quota.

There are no known other non-tariff barriers.

See attached tariff schedules

The main companies involved in oilseeds and oilseed products trading in Mexico, specifically with respect to importations are listed on the attached page.

Vegetable oil crushers/refiners generally produce in retail pack and sell directly to end users such as food processors and retail outlet chains or through distributors for resale to retail outlets. Oilseed meal is sold directly to the compound feed manufacturers or the larger integrated commercial livestock operations and regional livestock producer unions or associations.

Port of Entry	Grains/Oilseeds Storage Capacity 000 Tonnes	Annual Throughput Capacity
Tampico (Gulf of Mexico)	27	1680
Veracruz (Gulf of Mexico)	25	1620
Tuxpan	14	840
Coatzacoalcos (Gulf of Mexico)	10	720
Progreso/Mérida (Gulf of Mexico)	20	384
Mazatlan (Pacific coast)	20	960
Guaymas (Gulf of California)		
	204	8604

Veracruz and Tampico have bulk edible oil handling facilities. Storage facilities both at ports and inland are either government-owned (Almacenes Nacionales de Depósito and Bodegas Rurales Conasupo) or private. Oilseed crushers/refiners, compound feed manufacturers and large integrated livestock producers generally have some storage capacity. The trend is to the privatization of all government-owned storage facilities.

Oilseed in bulk, vegetable oil and meal are moved by both truck and rail, inland from ports and border crossings to crushers/refiners and feed manufacturers.

More storage capacity on the Pacific coast of Mexico, particularly at Manzanillo, to receive shipments of oilseeds, bulk vegetable oil (and wheat) and malting and feed barley from Vancouver would facilitate the servicing of the adjacent smaller crushers/refiners (and flour millers and malt houses) located in Northwestern and Central Mexico with Canadian oilseeds (and grains). Generally these operations cannot afford to purchase and store 14,000 tonne vessel loads.

Canadian oilseeds and products are presently only being imported in small volumes because of non-competitive prices with Polish canola. When they were imported in 1989 (and 1990 and 1991 in the case of small quantities of canola oil and flaxseed) the buyers were crushers/refiners and food processors (for use as food ingredients).

Low erucic acid rapeseed oil whether crushed and refined from Canadian canola or European rapeseed is not retail marketed as a distinct pure oil in Mexico. The very competitive nature of the market and its price sensitivity require the Mexican vegetable oil processing industry to purchase the lowest priced oilseeds and crude vegetable oils and to blend them based on the least cost formulation. There is currently no regulation that requires refiners and distributors to identify the proportion of oils in a blend or to even ensure that the contents correspond to the label description. For example, oil described as cartamo (safflower) is often not pure safflower but a blend of safflower, sunflower and low euricic acid rapeseed (or canola) oils. In other cases the oil is merely identified as vegetable oil with an indication on the bottom of the label that it contains "soyoil and/or sunflower and/or canola oil, etc".

It should also be noted that the term canola is used generically in Mexico for oil produced from the Brassica Napus or Campestris varieties of double zero rapeseed. Although canola was registered as a trade mark in Mexico by the Canola Council of Canada several years ago, because canola has never been retail marketed as a distinct oil (only as an ingredient in blended vegetable oil) no effort has been made to legally control the use of the term. Processors and consumers now use the term in a generic sense and it is not perceived as a Canadian oil or an oil with any special health qualities. Labels merely list it at the bottom as one of the possible ingredients of the vegetable oil eventhough the origin may be Poland.

Because of the drought suffered by Europe this year and the reduced production in Poland there is a likelihood that Canadian canola will be in demand from November, 1992 onwards. To date (August), in 1992 it is understood that two fifteen thousand tonne shipments of Canadian canola with a CIF Pacific ports value of US$7.4 million have been sold to Mexican processors.

Little substantial growth potential is projected for flaxseed or linseed oil beyond its volume of recent years.

b) Exports

There are no Mexican governmental programs to encourage exports of oilseeds or products. Mexico exports a small amount of sesame seed each year, primarily to the United States. There are also exports of cartamo (safflower) oil to California. Mexican exports in total of oils and fats in 1991 are estimated at only 1.6 thousand tonnes.

5) FINANCING

The common method of payment/financing for imported oilseeds and oil is payment basis an irrevocable and confirmed letter of credit in favour of seller. Oil or seed is generally not sold on the basis of credit terms extended by seller. Price rather than financing is the crucial factor in this market at this time.

Although Canadian banks (Royal Bank and Banks of Nova Scotia and Montreal and the Canadian Imperial Bank of Commerce) have representatives in Mexico, only Mexican banks are permitted by law to provide and perform the usual banking services. EDC financing is available to Mexican buyers through the Mexican commercial banks.

The availability of United States Commodity Credit under GSM 102/103 for soybeans undoubtedly enhances its competitive advantage. U.S. soybean oil shipments to Mexico are eligible for assistance under the US Export Enhancement Program. As well, subsidized European rapeseed oil purchases and the apparent willingness (presumably to

obtain hard currency) of Poland to market its rapeseed into Mexico at prices substantially below international oilseed prices are all overwhelmingly important factors in this very price sensitive market. Crude oils are also being imported from Argentina utilizing an export subsidy provided by the Argentine government. Aid programs are not utilized to supply this market.

6) COMPETITORS MARKET STRATEGIES

As already noted, the marketing strategy employed by suppliers of oilseed and products to this market is exclusively price competitiveness. Product quality is also of course an important element. In addition to low prices, the ability of Poland to completely capture the Mexican low erucic acid rapeseed market in 1990 and 1991 is due to the fact the Mexican crushers/refiners consider the Poland product to be equal to canola in quality. In some cases the Polish crude oil has a more desirable color (less green).

7) CANADIAN MARKETING STRATEGIES

The principal marketing strategy weakness is that Canadian canola seed is unfortunately not price competitive with Polish rapeseed. At the beginning of 1992 the price difference between canola and Polish rapeseed was US$12. However, there has not been any Polish offer since June of this year, due to the dramatic drop in rapeseed production in that country due to drought.

As it appears that Poland intends to try, production volumes permitting to maintain its market dominance, some way must be found to narrow the price differential and provide a supply service that Poland cannot match.

The establishment of a Mexico/Canada joint venture supply capability on the Mexican Pacific coast which could receive and hold at a reasonable cost canola and canola oil (and wheat and malting and feed barley) would enable Canadian exporters to take advantage of the lower cost transportation route from the Prairies/Vancouver to the Mexican Pacific coast. From this storage facility grains and oilseeds could be supplied to the smaller Mexican crushers/refiners (and millers/food processors/mallsters/feed manufacturers) and those plants with limited storage capacity.

Under present market conditions our potential for canola or canola oil sales are constrained. Imports of canola/LEAR rapeseed and product in the 1987-1990 period have, depending on price relationships with substitute oilseeds, reached 353 thousand tonnes. It is estimated that a storage facility to service the smaller users and those with limited storage capacity with Canadian canola and product through the Pacific coast

would enable Canadian suppliers to recapture up to one-half of the total seed for crushing market, provided, of course, the price differential is eliminated. The prospects for exports of canola meal to Mexico are limited in view of the supply of lower cost meal from Mexican crushers and the competition from US soyameal.

It is anticipated that under a free trade environment with the US and Canada over the long term, the production of oilseeds (soybean and safflower) in Mexico will decrease significantly signalling increased imports from foreign suppliers. Thus it is estimated that depending on favourable price relationships, the import volume of LEAR/canola and products could increase substantially. Should Canadian canola seed become price competitive and regain some market share an effort should be made to position it as a premium oil similar to olive oil. Olive oil retails for about 20,000 pesos per litre vis a vis the price of blended vegetable oils containing canola oil of about 3,050 pesos per litre. Even a small portion of this higher pricing margin would provide sufficient incentive and resources for the Mexican distributors and retailers to promote canola as a distinct health oil. However, this would not preclude the continued blending for canola oil with other oils in least cost formulations.

In this regard some effort should be directed by Canadian suppliers and/or the Canola Council of Canada at persuading with financial assistance a major Mexican crusher/refiner distributor to market canola oil labeled as "pure Canadian Canola oil" and promote and establish it in the consumers mind as a superior health oil. Should this occur, an effort should be made to restrict the use of the term to Canadian origin canola. This would, of course involve the use of Mexican legal counsel and consequent legal expenses.

8) There are no "significant discrepancies" in our view in the Oil World statistics vis a vis official Mexican statistics and our knowledge of this market.

Mexican oilseed production in 1992/93 is estimated by the Mexican Oil Industry Council at 1,246,300 tonnes with soybeans accounting for 713,000 tonnes of that total.

H.S. CODE	DESCRIPTION OF GOODS	RATE OF DUTY % AD VAL.
12.01 00 01	Soya beans, whether or not broken	Free
12.02	Ground-nuts, not roasted or otherwise cooked, whether or not shelled or broken:	
10	- In shell:	
01	- - For sowing	Free
99	- - Other	Free
20 01	- Shelled, whether or not broken	Free
12.03 00 01	Copra	Free
12.04	Linseed, whether or not broken:	
00 01	- Of linseed ("Linum usitatissimum")	Free
00 99	- Other	Free
12.05	Rape or colza seeds, whether or not broken:	
00 01	- Rape seeds	Free
00 02	- ~~Colza~~ seeds ("Brassica napus or Brassica campestris") CANOLA	Free
12.06	Sunflower seeds, whether or not broken:	
00 01	- For sowing	Free
00 99	- Other	Free
12.07	Other oil seeds and cleaginous fruits, whether or not broken:	
10 01	- Palm nuts and kernels	Free
20	- Cotton seeds:	
01	- - Other than for sowing	Free
02	- - For sowing	Free
30 01	- Castor oil seeds	Free
40 01	- Sesamum seeds	Free
50 01	- Mustard seeds	5
60	- Safflower seeds:	
01	- - Other than for sowing	Free
99	- - For sowing	Free
	- Other:	
91 01	- - Poppy seeds (*)	10
92 01	- - Shea nuts (karite nuts)	Free
99	- - Other:	
01	- - - Of marijuana ("Cannabis sativa")	Free
	- - -	
99	- - - Other	Free
12.08	Flours and meals of oil seeds or oleaginous fruits, other than those of mustard:	
10 01	- Of soya beans	Free
90	- Other:	
01	- - Of cotton	15
02	- - Of sunflower	15
99	- - Other	15

(*) An import permit is required

H.S. CODE	DESCRIPTION OF GOODS	RATE OF DUTY % AD VAL.
15.07	Soya-bean oil and its fractions, whether or not refined, but not chemically modified:	
10 01	- Crude oil, whether or not degummed	10
90 99	- Other	20
15.08	Ground-nut oil and its fractions, whether or not refined, but not chemically modified:	
(**) 10 01	- Crude oil	10
(**) 90 99	- Other	20
15.09	Olive oil and its fractions, whether or not refined, but not chemically modified:	
10	- Virgin:	
(**) 01	- - In tanker lorries or tanker vessels	10
(**) 99	- - Other	10
90	- Other:	
(**) 01	- - Refined, in tanker lorries or tanker vessels	20
(**) 02	- - Refined, weighing less than 50 kg including immediate containers	20
(**) 99	- - Other	20
15.10 00 01	Other oils and their fractions, obtained solely from olives, whether or not refined, but not chemically modified, including blends of these oils or fractions with oils or fractions of heading No. 15.09	10
15.11	Palm oil and its fractions, whether or not refined, but not chemically modified:	
10	- Crude oil:	
(**) 01	- - Amber, crude	10
(**) 99	- - Other	10
(**) 90 99	- Other	20
15.12	Sunflower-seed, safflower or cotton-seed oil and their fractions, whether or not refined, but not chemically modified:	
	- Sunflower-seed or safflower oil and their fractions:	
(**) 11 01	- - Crude oil	10
(**) 19 99	- - Other	20
	- Cotton-seed oil and its fractions:	
(**) 21 01	- - Crude oil, whether or not gossypol has been removed	10
29 99	- - Other	20
15.13	Coconut (copra), palm kernel or babassu oil and their fractions, whether or not refined, but not chemically modified:	
	- Coconut (copra) oil and its fractions:	
(**) 11 01	- - Crude oil	10
(**) 19 99	- - Other	20
	- Palm kernel or babassu oil and their fractions:	
21 01	- - Crude oil	10
(**) 29 99	- - Other	20
15.14	Rape, colza or mustard oil and their fractions, whether or not refined, but not chemically modified:	
(**) 10 01	- Crude oil	10
(**) 90 99	- Other	20

(**) Imports to free zones of Mexico now pay a customs duty.

H.S. CODE .			DESCRIPTION OF GOODS	RATE OF DUTY % AD VAL.
15.15			Other fixed vegetable fats and oils (including jojoba oil) and their fractions, whether or not refined, but not chemically modified:	
			- Linseed oil and its fractions:	
	11	01	- - Crude oil	10
(**)	19	99	- - Other	20
			- Maize (corn) oil and its fractions:	
(**)	21	01	- - Crude oil	10
(**)	29	99	- - Other	20
(**)	30	01	- Castor oil and its fractions	10
(**)	40	01	- Tung oil and its fractions	10
(**)	50	01	- Sesame oil and its fractions	10
(**)	60	01	- Jojoba oil and its fractions	10
(**)	90		- Other:	10
	(**)	01	- - Oiticica oil	10
	(**)	02	- - Of copahu, crude	10
	(**)	03	- - Of almond	10
	(**)	99	- - Other	10
21.03			Sauces and preparations therefor; mixed condiments and mixed seasonings; mustard flour and meal and prepared mustard:	
	10	01	- Soya sauce	20
	20	01	- Tomato ketchup and other tomato sauces	20
	30		- Mustard flour and meal and prepared mustard:	
		01	- - Mustard flour	20
		02	- - Prepared mustard	20
	90	99	- Other	20

OILSEED SURVEY, 1992

Attached please find the 1992 oilseed survey questionnaire (which is the same as last year) which we are sending to you at the request of Agriculture Canada/Grain Marketing Bureau.

TAA will be sending to each addressee, by bag, a copy of the questionnaire (in case its legibility was too degraded by the facsimilie process to be useable) and Oil World's annual statistics pertaining to each addressee's territory.

Please note the following:

- The oilseed survey questionnaire, as was the case last year, replaces the annual oilseed industry report and the oilseeds portion of the Grains and Oilseeds Survey.

- Emphasis should be on policy and domestic infrastructure questions that are difficult or impossible to answer from sources available in Canada.

- No specific space has been left after any of the questions. Respondents are to determine the adequate length of answers and are free to add any relevant information considered relevant even if not specifically requested and/or attach any pertinent documents or articles considered useful.

- If any question is not applicaple to your territory, please so indicate and pass on to the next.

- Posts are not expected to collect statistical data. Rather. they are to review the Oil World statistics sent by bag and note any errors or omissions that could affect the Canadian oilseed industry's assessment of the oilseed sector of the particular country reviewed.

- We request receipt of your faxed responses, in TAA, by August 24th. If for any reason this deadline is a problem, please advise us as soon as possible. There will, of course, be some allowances here for slippage, but, we anticipate that any responses received after September 18th will not be included in the survey to be distributed to the industry. Missing responses are likely to be conspicuous by their absence.

- Please also send us a copy of your responses by bag.

OILSEED SURVEY - 1992

Attached please find the 1992 oilseed survey questionnaire (which is the same as last year) which we are sending to you at the request of Agriculture Canada/Grain Marketing Bureau.

TAA will be sending to each addressee, by bag, a copy of the questionnaire (in case its legibility was too degraded by the facsimile process to be useable) and Oil World's annual statistics pertaining to each addressee's territory.

Please note the following:

- The oilseed survey questionnaire, as was the case last year, replaces the annual oilseed industry report and the oilseeds portion of the Grains and Oilseeds Survey.

- Emphasis should be on policy and domestic infrastructure questions that are difficult or impossible to answer from sources available in Canada.

- No specific space has been left after any of the questions. Respondents are to determine the adequate length of answers and are free to add any relevant information considered relevant even if not specifically requested and/or attach any pertinent documents or articles considered useful.

- If any question is not applicable to your territory, please so indicate and pass on to the next.

- Posts are not expected to collect statistical data. Rather, they are to review the Oil World statistics sent by bag and note any errors or omissions that could affect the Canadian oilseed industry's assessment of the oilseed sector of the particular country reviewed.

- We request receipt of your faxed responses, in TAA, by August 24th. If for any reason this deadline is a problem, please advise us as soon as possible. There will, of course, be some allowances here for slippage, but, we anticipate that any responses received after September 18th will not be included in the survey to be distributed to the industry. Missing responses are likely to be conspicuous by their absence.

- Please also send us a copy of your responses by bag.

OILSEED SURVEY

(1) CONSUMPTION:

a) Human nutrition:

- Fats & Oils consumption per capita
- Of which: % animal fats; % vegetable fats
  % solid (ghee, margarine, lard, butter)
- Consumer preferences (i.e. type of oil) and trends (i.e. health issues, coloration, switch from solid to liquid fats, etc.)
- Consumption of soyfood products per capita (tofu, miso soy sauce, natto, tempeh, soybean drink)
- Flaxseed and flaxseed products for human consumption.

b) Protein meals:

- Size of livestock industry
- Consumption patterns for protein meal (percentage that is used by the poultry, hog, aquaculture, dairy or beef industries respectively).
- Growth patterns of livestock industry and of protein meal consumption. Meals utilized.
- Is Canola or Flax meal well known? What is their market image vis-a-vis soymeal?

c) Industrial utilization:

(eg. utilization of linseed oil in paint or linoleum products; high Erucic Acid. Rapeseed all for plastics, fuel etc. lubricants).

(2) PRODUCTION POLICIES:

- Production subsidy programs
- Domestic pricing policies

.../2

(3) DOMESTIC INDUSTRY INFRASTRUCTURE:

a) General:

- Degree of technical expertise in the industry;
- Processing, handling or storage facility constraints, etc.
- Describe the marketing infrastructure
- Main industry associations (include full address and indication of membership profile when possible)

b) Crushing industry infrastructure:

- Number of companies involved in crushing of oilseeds.
- Total crushing capacity
- Which are the main companies involved?; What is their approximate market share?; Type of ownership (government? Private? National vs. International capital); provide their addresses when possible.

c) Refining industry infrastructure:
(Same information required as 3b)

d) Compound feed industry infrastructure:
(Same information required as in 3b)

e) Others:

- Description of margarine/ghee or vegetable shortening production capacity/infrastructure
- Number and names of major companies involved in the processing of soyfood products. (tofu, miso soy sauce, natto, tempeh, soybean drink)
- Companies involved in Linoleum production (from linseed oil).
- Companies involved in further processing of oilseeds and oilseed products.

.../3

(4) TRADE POLICIES:

a) Imports
- How are imports handled? (Private firms? Government Agencies? International tenders?)
- What are the present import policies? Have there been any recent changes? Are any changes expected?
- Tariff barriers

TARIFFS

Oilseeds	Crude Oil	Oilseed Meal	Refined Oil
Rape			
Soya			
Sunflower			
Mustard			
Flaxseed			
Sesame			
Groundnut			
Cottonseed			
Palm oil			
Coconut			
Olive			
Other			

- Non tariff barriers (Quotas, licensing requirements, differential exchange rates, preferential treatment of specific suppliers, phytosanitary restrictions, etc.)
- Main companies involved in oilseeds and oilseed products trading. How do end users (eg. livestock producers or feed companies) organize their purchases?
- Main ports of entry. Unloading capacity for bulk seed and bulk oil shipments, storage facilities, etc.
- Internal distribution network from port of entry to plant (railways, truck transportation).
- Identify any potential constraints affecting our capacity to serve this market.

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- How are imports handled? (Private firms? Government Agencies? International tenders?)
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TARIFFS

Oilseeds	Crude oil	Oilseed Meal	Refined oil
Rape			
Soya			
Sunflower			
Mustard			
Flaxseed			
Sesame			
Groundnut			
Cottonseed			
Palm oil			
Coconut			
Olive			
Other			

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- Internal distribution network from port of entry to plant (railways, truck transportation).
- Identify any potential constraints affecting our capacity to serve this market.

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- If Canadian oilseeds or oilseed products are being, imported who are the main buyers and the main end users?. What are they being used for? Give details of product image/identification/ substitutability as well as perceived problems and strengths, etc. if possible. Include industrial uses if applicable.
(eg. linoleum or paint industry uses of flaxseed)

b) **Exports:**

- Domestic support systems designed to encourage export such as direct subsidies, duty draw-backs on exports, etc.
- Domestic support systems design to encourage export of oilseed products (instead of unprocessed commodities) such as differential export taxation on processed products, export license controls or domestic crushing subsidies.

(6) FINANCING:

- Indicate prevalent financing trends for imports/exports.
- Method of payment.
- Canadian or International banking institutions represented in the country
- Indicate availability of commercial credit programs offered by potential competitors (eg. US GSM programs) or concessional/subsidized credit (eg. US EEP program) and degree of usage/ significance to local importers.
- Use of aid programs such as US PL-480 or EC export aid.

(7) COMPETITORS MARKETING STRATEGIES:

- Indicate marketing strategies used by competitors or potential competitors in that market.
- Highlight weaknesses and strengths.

(8) CANADIAN MARKETING STRATEGIES:

- Indicate weaknesses and strengths.
- What Canadian Actions would you recommend

.../5

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(8) CANADIAN MARKETING STRATEGIES:

- Indicate weaknesses and strengths.
- What Canadian Actions would you recommend

.../5

to strengthen our position? (Incoming/outgoing missions? Seminars? CIGI courses?) Provide if possible a brief cost benefit analysis for any recommendation.
- What is our real potential in this market under present market conditions (including price competitiveness) and how would your recommendations affect it?
- List of Canadian oilseed company agents.

(9) **STATISTICAL ANALYSIS:**

- Please carefully review the attached tables for oilseeds supply and utilization (from Oil World Annual) and indicate significant discrepancies, if any, from your knowledge of this market. If possible try to explain these discrepancies.

- In the figures given for rapeseed and rapeseed products (production/imports/exports) differentiate if possible between Low Erucic Acid and/or Canola type rapeseed and High Erucic Acid rapeseed.

B.Badani/gm
May 16/91

MEXICO : Area of Oilseeds (1000 ha)

Area	91/92p	90/91	89/90	88/89	87/88
Soybeans.....	330	236	490	139	471
Cottonseed.....	257	186r	189	298	222
Groundnuts.....	40*	40*	40*	39*	40
Sunflowerseed...	16*	17	3	16	10
Rapeseed.....	3*	3*	3*	3*	3*
Sesameseed.....	87	120*	66*	77r	89r
Copra(a).....	139p	140*	140*	150*	171
Linseed.....	4*	4*	4*	4*	4*
Castorseed.....	6*	6*	6*	6*	6*
Total.....	882	752	941	733	1015

(a)Total mature area.

MEXICO : Oilseed Production (1000 T)

Crop	91/92p	90/91	89/90	88/89	87/88
Soybeans.....	637	567	992r	226	828
Cottonseed.....	286	263	255	491	414
Groundnuts.....	39*	39*	39*	37	41
Sunflowerseed...	10*	11	2	12	8
Rapeseed.....	3*	3*	3*	3*	3*
Sesameseed.....	48	71r	31	34r	51r
Copra(a).....	170*	175*	173	200	201
Linseed.....	3*	3*	3*	3*	3*
Castorseed.....	4*	4*	4*	4*	4*
Total.....	1200	1136	1502	1009	1553

(a)Production: only copra as such (i.e. other uses of coconuts not included).

MEXICO : Soybean Balance (1000 T)

	Sept Aug 91/92F	Sept Aug 90/91	Sept Aug 89/90	Sept Aug 88/89	Sept Aug 87/88
Open'g stocks...	440*	50*	30*	60*	100*
Crop.....	637	567	992r	226	828
Imports.....	1260*	1777*	847*	1274*	849*
Crushings.....	2000*	1845*	1730*	1450*	1640*
Other use.....	137*	109*	89*	80*	77*
Ending stocks...	200*	440*	50*	30*	60*

MEXICO : Cottonseed Balance (1000 T)

	Aug July 91/92F	Aug July 90/91	Aug July 89/90	Aug July 88/89	Aug July 87/88
Open'g stocks...	- *	- *	13*	27*	- *
Crop.....	286	263	255	491	414
Imports.....	90*	46*	41*	42*	36*
Crushings.....	333*	275*	274*	500*	378*
Other use.....	43*	34*	35*	47*	45*
Ending stocks...	- *	- *	- *	13*	27*

MEXICO : Sunflowerseed Balance (1000 T)

	Oct Sept 91/92F	Oct Sept 90/91	Oct Sept 89/90	Oct Sept 88/89	Oct Sept 87/88
Open'g stocks...	5*	2*	2*	1*	17*
Crop.....	10*	11	2	12	8
Imports.....	240*	192*	100*	116*	237*
Crushings.....	240*	198*	100*	126*	258*
Other use.....	4*	3*	2*	2*	3*
Ending stocks...	11*	5*	2*	2*	1*

MEXICO : Crushings and Net Imports of Oilseeds (1000 T)

Crushings	Oct Sept 91/92F	Oct Sept 90/91	Oct Sept 89/90	Oct Sept 88/89	Oct Sept 87/88	Oct Sept 86/87	Jan Dec 1991	Jan Dec 1990	Jan Dec 1989	Jan Dec 1988	Jan Dec 1987
Soybeans.....	1990.0*	1845.0*	1747.6*	1493.9*	1583.5*	1640.0*	1913.8*	1755.4*	1611.0*	1463.5*	1715.0*
Cottonseed.....	335.0*	284.4*	275.0*	496.0*	391.8*	235.5*	297.4*	277.5*	425.4*	444.3*	262.7*
Groundnuts(a)...	12.5*	11.5*	11.5*	14.0*	15.0*	9.0*	11.8*	11.5*	13.9*	14.1*	10.7*
Sunflowerseed...	240.0*	198.0*	100.0*	126.0*	258.0*	428.0*	225.0*	121.0*	100.6*	238.7*	397.3*
Rapeseed.....	330.0*	255.0*	134.5*	265.0*	175.0*	283.8*	280.0*	204.5*	234.0*	165.0*	329.4*
Sesameseed.....	5.0*	10.6*	6.9*	- *	11.9*	12.6*	8.7*	10.2*	- *	7.8*	13.4*
Copra.....	169.3*	172.5*	177.9*	198.3*	192.8*	177.1*	173.0*	171.0*	198.0*	199.0*	175.0*
Linseed.....	4.3*	2.8*	5.0*	4.8*	5.9*	9.9*	2.7*	4.9*	4.6*	5.9*	8.7*
Total.....	3086.1	2779.8	2458.4	2598.0	2634.0	2795.9	2912.3	2556.0	2587.6	2538.4	2912.2
Net imports											
Soybeans.....	1330.0*	1577.0*	938.7*	1239.2*	892.3*	1017.1*	1507.3*	895.0	1110.4	1097.9	1062.3
Cottonseed.....	90.0*	48.8*	40.8*	33.8*	43.9*	27.7*	60.2*	45.0	37.6	43.8	20.3
Groundnuts(a)...	12.8*	8.8*	8.8*	12.9*	9.9*	-0.7*	14.4*	8.2*	10.9	13.2	1.0
Sunflowerseed...	240.0*	192.4*	100.3*	116.2*	237.0*	411.2*	249.0*	114.9	104.5	211.3	294.0
Rapeseed.....	335.0*	270.7*	116.0*	292.2*	154.6*	295.6*	296.7*	238.0	219.0	170.9	350.3
Sesameseed.....	-46.0*	-43.8*	-28.6*	-32.4*	-32.7*	-35.3*	-44.9*	-28.2	-29.5	-35.3	-31.3*
Linseed(b).....	1.7*	0.2*	2.5*	2.2*	3.7*	7.5*	0.3*	1.7*	1.2*	3.9*	3.6*
Total.....	1963.5	2054.1	1178.4	1664.1	1308.7	1723.1	2082.9	1274.7	1454.2	1505.8	1700.2

(a)Shelled basis. (b)Derived from statistics of known trading partners, considering 1 month shipping time.

MEXICO : Balance of Oils and Fats (1000 T)

	Oct Sept 91/92F	Oct Sept 90/91	Oct Sept 89/90	Oct Sept 88/89	Oct Sept 87/88	Oct Sept 86/87	Jan Dec 1991	Jan Dec 1990	Jan Dec 1989	Jan Dec 1988	Jan Dec 1987
Open'g stocks...	112.0*	104.0*	159.0*	69.0*	54.0*	199.0*	109.0*	128.0*	98.0*	48.0*	105.5*
Production											
Soybean oil.....	340.3*	315.5*	298.8*	255.5*	270.8*	280.4*	327.3*	300.2*	275.5*	250.3*	293.3*
Cotton oil.....	48.6*	41.2*	39.9*	71.9*	56.8*	34.1*	43.1*	40.2*	61.7*	64.4*	38.1*
Groundnutoil....	5.3*	4.9*	4.9*	6.0*	6.4*	3.8*	5.0*	4.9*	5.9*	6.0*	4.5*
Sunfloweroil....	96.2*	79.4*	40.1*	50.5*	103.5*	172.0*	90.2*	48.5*	40.4*	95.8*	159.3*
Rapeseed oil....	122.0*	94.4*	49.8*	98.1*	64.8*	105.0*	103.6*	75.7*	86.6*	61.1*	121.9*
Sesame oil.....	2.5*	5.2*	3.4*	- *	5.9*	6.2*	4.3*	5.1*	- *	3.9*	6.7*
Corn oil.....	14.0*	12.6*	11.2*	14.5*	24.4*	17.8*	13.1*	11.5*	11.1	25.7	19.8
Coconut oil.....	106.6*	108.7*	112.1*	124.9*	121.5*	111.5*	109.0*	107.7*	124.7*	125.4*	110.3*
Butter,as fat...	29.5*	27.9*	26.5*	23.6*	23.5*	24.2*	28.0*	27.9*	23.6	23.5	23.5
Lard.....	62.3*	59.8*	59.4*	66.6*	69.1*	67.6*	59.8*	57.0*	65.5*	69.4*	68.4*
Fish oil.....	13.7*	13.9*	13.3*	14.0*	11.0*	13.8*	14.3*	12.9	15.3	9.7	15.0
Linseed oil.....	1.4*	0.9*	1.7*	1.6*	2.0*	3.3*	0.9*	1.6*	1.5*	1.9*	2.9*
Tallow&Grease...	88.0*	85.6*	86.7*	92.7*	77.2*	66.2*	85.8*	83.6*	96.5*	81.2*	63.7*
Total.....	930.4	850.0	747.7	819.8	836.7	906.1	884.3	776.8	808.3	818.1	927.3
Imports											
Soybean oil.....	70.0*	69.4*	55.7*	97.3*	65.2*	21.6*	94.2*	45.3	89.9	87.3	27.1
Cotton oil.....	8.4*	8.6*	5.0*	2.5*	3.9*	3.5*	6.0*	7.1	2.0	4.8	2.0
Groundnutoil....	0.9*	0.8*	1.6*	0.9*	1.4*	-	0.4*	1.9*	0.7*	1.9	-
Sunfloweroil(a).	168.0*	192.6*	170.3*	226.0*	197.7*	40.6*	159.3*	176.0	238.4	207.2	58.6
Rapeseed oil(a).	143.0*	121.5*	130.8p	27.5*	7.0*	- *	152.3*	153.3p	28.8p	17.1	0.2*
Corn oil(a).....	14.3*	10.7*	6.7*	2.5*	5.3*	0.9*	13.6*	9.5*	1.7*	2.7*	4.1*
Olive oil.....	1.3*	1.0*	1.1*	1.0*	0.9*	0.2*	1.3*	0.8*	1.2	1.3	0.3
Palm oil.....	80.0*	72.3*	86.0*	33.5*	4.9*	3.1*	68.5*	87.6p	46.0	10.4	2.4
Palmkern oil....	5.0*	0.7*	7.6*	2.0*	-	-	1.9*	7.5*	2.1	-	-
Coconut oil.....	23.0*	28.5*	13.3*	42.8*	37.0*	5.0*	28.0*	6.2	35.9	35.9	21.9
Butter,as fat...	31.0*	29.9*	18.9*	22.3*	19.2	15.6*	32.7*	22.2	24.8	18.5	15.4
Lard.....	34.0*	35.7*	29.8*	41.5*	47.1*	34.8*	35.8*	30.0*	29.4	56.0*	39.0
Fish oil.....	34.0*	37.7*	26.5*	10.4*	0.8*	0.5*	41.2*	31.0*	13.6	1.0	0.5
Linseed oil.....	2.2*	2.0*	2.5*	3.4*	0.9*	0.3*	1.8*	2.6*	3.1	1.5	0.3
Tallow&Grease...	190.0*	178.4*	180.9*	196.1*	153.9*	137.1*	193.0*	176.0*	182.0*	169.2	162.2
Total.....	805.0	789.9	736.8	709.6	545.2	263.0	830.0	757.1	699.6	614.7	333.9
Exports(c)	2.0*	1.8*	7.9*	19.3*	6.3*	1.5*	1.6*	1.5*	24.9	6.8	2.3
Dom.Disappear(b)											
Soybean oil.....	402.3*	386.9*	369.6*	322.8*	341.0*	363.0*	395.5*	364.4*	350.4*	325.5*	357.4*
Cotton oil.....	57.0*	49.8*	44.9*	74.4*	60.7*	37.6*	49.1*	47.4*	63.7*	69.2*	40.1*
Groundnutoil....	6.2*	5.7*	6.5*	6.8*	7.7*	3.8*	5.4*	6.8*	6.6*	7.9*	4.5*
Sunfloweroil....	257.2*	255.2*	227.5*	247.2*	274.8*	283.1*	237.9*	231.0*	253.8*	276.2*	247.6*
Rapeseed oil....	253.0*	201.9*	179.6*	118.5*	75.7*	104.0*	228.9*	212.0*	106.4*	80.1*	117.6*
Sesame oil.....	2.5*	5.2*	3.4*	- *	5.9*	6.2*	4.3*	5.1*	- *	3.9*	6.7*
Corn oil.....	28.3*	23.3*	17.9*	17.0*	29.8*	18.7*	26.7*	21.0*	12.8*	28.4*	24.0*
Olive oil.....	1.3*	1.0*	1.1*	1.0*	0.9*	0.2*	1.3*	0.8*	1.2	1.3	0.3
Palm oil.....	77.5*	76.3*	74.0*	31.5*	4.9*	3.1*	76.5*	77.6*	41.0*	10.4*	2.4*
Palmkern oil....	5.0*	0.7*	7.6*	2.0*	-	-	1.9*	7.5*	2.1	-	-
Coconut oil.....	130.6*	142.2*	135.4*	152.7*	148.5*	116.5*	137.0*	121.9*	158.7*	153.3*	124.1*
Butter,as fat...	60.5*	57.8*	45.3*	45.8*	42.7*	39.8*	60.7*	50.1*	48.4	41.9	38.9
Lard.....	96.3*	95.5*	89.2*	108.1*	116.2*	102.4*	95.6*	87.0*	95.0*	125.4*	107.4*
Fish oil.....	47.7*	51.6*	39.8*	24.4*	11.7*	14.3*	55.5*	43.9*	28.8	10.6	15.5
Linseed oil.....	3.6*	2.9*	4.1*	5.0*	2.8*	3.5*	2.7*	4.2*	4.7*	3.5*	3.2*
Tallow&Grease...	272.0*	274.0*	285.6*	262.8*	237.1*	216.3*	275.8*	270.6*	279.5*	238.4*	226.9*
Total.....	1701.0	1630.1	1531.6	1420.1	1360.6	1312.6	1654.7	1551.4	1453.0	1376.0	1316.4
Ending stocks											
Soybean oil.....	33.0*	25.0*	27.0*	42.0*	12.0*	17.0*	46.0*	20.0*	39.0*	24.0*	12.0*
Sunfloweroil....	35.0*	30.0*	15.0*	40.0*	30.0*	10.0*	30.0*	20.0*	28.0*	28.0*	8.0*
Rapeseed oil....	37.0*	25.0*	11.0*	10.0*	3.0*	7.0*	57.0*	30.0*	13.0*	4.0*	6.0*
Palm oil.....	12.5*	10.0*	14.0*	2.0*	- *	- *	7.0*	15.0*	5.0*	- *	- *
Coconut oil.....	9.0*	10.0*	15.0*	25.0*	10.0*	- *	10.0*	10.0*	18.0*	16.0*	8.0*
Tallow&Grease...	18.0*	12.0*	22.0*	40.0*	14.0*	20.0*	17.0*	14.0*	25.0*	26.0*	14.0*
Total.....	144.5	112.0	104.0	159.0	69.0	54.0	167.0	109.0	128.0	98.0	48.0
Population.....	92.3*	90.5*	88.6p	86.8	84.9	83.0	90.5*	88.6p	86.8	84.9	83.0
Caput use(kilos)	18.4*	18.0*	17.3*	16.4*	16.0*	15.8*	18.3*	17.5*	16.7*	16.2*	15.9*

(a)Derived from statistics of known trading partners. (b)Residual of the balance. (c)All sunseed oil.

MEXICO : Balance of Oilmeals (1000 T)

Production	Oct Sept 91/92F	Oct Sept 90/91	Oct Sept 89/90	Oct Sept 88/89	Oct Sept 87/88	Oct Sept 86/87	Jan Dec 1991	Jan Dec 1990	Jan Dec 1989	Jan Dec 1988	Jan Dec 1987
Soybean meal....	1594.0*	1477.8*	1399.8*	1196.6*	1268.4*	1313.6*	1532.9*	1406.1*	1290.4*	1172.3*	1373.7*
Cotton meal.....	154.0*	130.8*	126.5*	228.2*	180.2*	108.3*	136.8*	127.6*	195.7*	204.4*	120.8*
Groundnutmeal...	7.0*	6.4*	6.4*	7.8*	8.4*	5.0*	6.6*	6.4*	7.8*	7.9*	6.0*
Sunflowermeal...	142.6*	117.6*	59.4*	74.8*	153.2*	253.8*	133.7*	71.9*	59.8*	141.8*	235.9*
Rapeseed meal...	198.0*	153.0*	80.7*	159.0*	105.0*	170.3*	168.0*	122.7*	140.4*	99.0*	197.6*
Sesame meal.....	2.2*	4.8*	3.1*	- *	5.4*	5.7*	3.9*	4.6*	- *	3.5*	6.0*
Corngerm meal...	15.8*	14.2*	12.6*	16.4*	27.6*	20.1*	14.8*	13.0*	12.5*	29.0*	22.4*
Corngl.feed.....	109.2*	98.3*	87.5*	113.1*	190.6*	139.1*	102.2*	89.7*	86.7*	200.8*	154.8*
Copra meal.....	60.9*	62.1*	64.1*	71.4*	69.4*	63.7*	62.3*	61.6*	71.3*	71.6*	63.0*
Linseed meal....	2.8*	1.8*	3.3*	3.1*	3.9*	6.4*	1.8*	3.2*	3.0*	3.8*	5.7*
Fish meal.....	87.0*	88.5*	85.0*	86.4*	84.1*	100.3*	90.2*	82.8	90.4	78.5	104.3
Total.....	2373.5	2155.4	1928.4	1956.9	2096.2	2186.6	2253.1	1989.7	1958.0	2012.7	2290.3
Imports											
Soybean meal(a).	315.0*	326.4*	379.1*	306.4*	138.5*	119.3*	308.0*	269.8	335.1	269.3	50.0
Cotton meal.....	31.0*	27.7*	16.0*	23.1*	27.5*	2.6*	21.7*	25.3	10.7	42.1	2.5*
Rapeseed meal(a)	6.5*	- *	8.9*	0.4*	- *	5.3*	- *	8.3*	1.0	-	5.3*
Corngl.feed(a)..	132.0*	128.0*	95.1*	70.0*	26.2*	7.0*	123.4*	107.0*	62.9*	46.0*	8.9*
Fish meal.....	17.0*	16.0*	37.1*	38.2*	11.2*	2.2*	15.9*	24.0	40.9	26.1	2.7
Total.....	501.5	498.1	536.2	438.2	203.4	136.4	468.9	434.2	450.5	383.5	69.4
New Supplies (b)											
Soybean meal....	1909.0*	1804.2*	1778.9*	1503.1*	1406.9*	1433.0*	1840.9*	1675.9*	1625.5*	1441.6*	1423.8*
Cotton meal.....	185.0*	158.5*	142.5*	251.3*	207.8*	110.9*	158.5*	152.9*	206.4*	246.5*	123.3*
Groundnutmeal...	7.0*	6.4*	6.4*	7.8*	8.4*	5.0*	6.6*	6.4*	7.8*	7.9*	6.0*
Sunflowermeal...	142.6*	117.6*	59.4*	74.8*	153.2*	253.8*	133.7*	71.9*	59.8*	141.8*	235.9*
Rapeseed meal...	204.5*	153.0*	89.6*	159.4*	105.0*	175.6*	168.0*	131.0*	141.4*	99.0*	202.9*
Sesame meal.....	2.2*	4.8*	3.1*	- *	5.4*	5.7*	3.9*	4.6*	- *	3.5*	6.0*
Corngerm meal...	15.8*	14.2*	12.6*	16.4*	27.6*	20.1*	14.8*	13.0*	12.5*	29.0*	22.4*
Corngl.feed.....	241.2*	226.3*	182.6*	183.1*	216.8*	146.1*	225.6*	196.7*	149.6*	246.8*	163.7*
Copra meal.....	60.9*	62.1*	64.1*	71.4*	69.4*	63.7*	62.3*	61.6*	71.3*	71.6*	63.0*
Linseed meal....	2.8*	1.8*	3.3*	3.1*	3.9*	6.4*	1.8*	3.2*	3.0*	3.8*	5.7*
Fish meal.....	104.0*	104.5*	122.1*	124.6*	95.3*	102.5*	106.1*	106.8	131.3	104.7	106.9
Total.....	2875.0	2653.5	2464.7	2395.0	2299.7	2322.9	2722.1	2423.9	2408.5	2396.2	2359.7

(a)Derived from statistics of known trading partners, considering 1 month shipping time. (b)Residual of the balance.

MEXICO : Imports, by Country (1000 T)

Soybeans	Jan Dec 1991	Jan Dec 1990	Jan Dec 1989	Jan Dec 1988	Jan Dec 1987
U.S.A.....	1487.8*	844.5*	1110.4*	1097.9	1062.3
Argentina.....	19.5*	43.4	-	-	-
China,PR.....	- *	7.1p	-	-	-
Oth Countries...	- *	0.1*	- *	-	-
Total.....	1507.3*	895.0	1110.4	1097.9	1062.3
Soybean oil					
France.....	22.1*	5.0*	-	-	-
Germany.....	-	-	-	0.6*	1.4*
Netherlands.....	- *	13.0	-	-	-
Spain.....	- *	3.2*	-	-	-
U.S.A.....	17.7*	2.6*	36.5*	19.5*	20.7*
Argentina.....	47.4*	17.3*	21.4*	54.7*	5.0*
Brazil.....	7.1*	4.2	32.1*	12.5*	-
Oth Countries...	- *	- *	- *	- *	- *
Total.....	94.2*	45.3	89.9	87.3	27.1
Soybean meal					
U.S.A.....	308.0*	269.8*	320.9*	269.3*	50.0
Brazil.....	-	-	14.2*	-	-
Oth Countries...	- *	- *	- *	- *	-
Total.....	308.0*	269.8	335.1	269.3	50.0
Cottonseed					
U.S.A.....	56.8*	40.2*	31.6*	31.6*	10.3*

(Cont'd next column)

(Stats. cont'd) Cottonseed	Jan Dec 1991	Jan Dec 1990	Jan Dec 1989	Jan Dec 1988	Jan Dec 1987
China,PR.....	- *	- *	2.1*	12.3*	10.0*
Oth Countries...	3.3*	4.8*	3.9*	- *	- *
Total.....	60.2*	45.0	37.6	43.8	20.3
Cotton oil					
U.S.A.....	4.9*	1.0*	2.0*	4.8*	2.0*
Argentina.....	1.1*	2.0	-	-	-
Brazil.....	. *	4.1	-	-	-
Oth Countries...	. *	- *	- *	- *	- *
Total.....	6.0*	7.1	2.0	4.8	2.0
Cotton meal					
U.S.A.....	21.7*	4.1*	6.7*	42.1*	2.5*
Nicaragua.....	-	19.8*	4.0*	-	-
Oth Countries...	- *	1.3*	- *	- *	- *
Total.....	21.7*	25.3	10.7	42.1	2.5*
Groundnuts(a)	14.6*	8.2*	10.9	13.2	2.0
Groundnutoil	0.4*	1.9*	0.7*	1.9	-
Sunflowerseed					
Canada.....	-	-	-	4.1*	-
U.S.A.....	1.7*	1.9*	10.2*	170.7*	233.9*
Argentina.....	215.7*	96.5*	55.0	11.7*	52.6*
Australia.....	31.5*	16.5*	39.3*	24.9*	7.5*
Oth Countries...	0.1*	. *	- *	- *	- *
Total.....	249.0*	114.9	104.5	211.3	294.0

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