

Pork Products



THE OPPORTUNITY

Mexico offers important opportunities for Canadian producers of all kinds of pork, ranging from prime cuts to high value-added processed products.

- Mexicans are major consumers of pork. Per capita consumption is expected to rise to about 20 kilograms per capita by the year 2000.
- Canadian pork is considered superior to pork from the United States, and closer in texture and taste to high-quality Mexican pork.
- Mexican producers cannot keep up with demand. Imports accounted for almost one-quarter of the market in 1994.
- The devaluation of the peso will reduce overall meat consumption, but middle-income Mexicans will switch from beef to pork to cut costs.

THE MEXICAN PORK SECTOR

Pork has always been an important component of the Mexican diet. Mexicans consume virtually every part of the pig, including the intestines, brains and *codillos*, pork hocks. Per capita consumption for 1993 was somewhere between 10 to 11 kilograms. According to industry experts, consumption could reach 20 kilograms per capita by the year 2000.

For decades, the Mexican industry developed under the protection of government-imposed price controls

and import restrictions. Although these policies succeeded in fostering the development of small producers, the end effect was an inefficient industry that was ultimately unable to meet the nation's needs.

Beginning in 1988, the government embarked on a sweeping program of reforms, affecting the entire economy. Price controls were eliminated, and imports of pork products were allowed for the first time. Competition from imports increased sharply as a result.

Canada's exports of pork to Mexico have increased steadily since imports were first allowed in 1988. According to official Mexican data, the value of exports rose tenfold from US \$3.6 million in 1989 to US \$36 million in 1994. The sharp devaluation of the peso, which occurred in December 1994, is expected to curtail imports during 1995. The impact of this will be mitigated to some extent by consumers switching from beef to pork.

Some analysts believe that Canada could increase its market share dramatically, from about 14 percent in 1993 to as much as 50 percent of the total market for imported pork. The key is to establish an image of Canadian pork as a safe, high-quality product.

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: Pork Products*. This market information on the Mexican Market for Pork Products has been produced and published by Prospectus Inc. under contract with DFAIT, along with other market profiles and summaries on business opportunities in Mexico. It is available from:

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MEXICAN PORK PRODUCTION

Mexican pork production is not sufficient to satisfy demand, and many processors import meat from the United States and cut it in Mexico. Total production is 9.5 million head, which is equivalent to more than 800,000 tonnes of meat, plus about 130,000 tonnes of offal. Imports are roughly 230,000 tonnes per year, bringing total consumption to more than 1.1 million tonnes.

HOG PRODUCERS

Mexican hog producers are classified by the *Secretaría de Agricultura, Ganadería y Desarrollo Rural (SAGAR)*, Secretariat of Agriculture, Livestock and Rural Development, according to the level of technology they employ. They are described as technified, semi-technified or *rural o transpatio*, family units.

- **Technified producers** account for about 40 percent of Mexican pork production. They maintain specialized sites and operate under strict controls. Reproduction techniques and genetics play an important role. For the most part, the technified sector is able to meet the official Mexican sanitary inspection standards known as *Tipo Inspección Federal (TIF)*.
- **Semi-technified producers** take only limited advantage of advanced breeding methods, and tend to be more traditional. Sanitary control is generally deficient and genetic quality tends to be low. Productivity is lower than in the technified sector. Semi-technified producers account for 30 percent of total production.
- **Family production** of pork is still very common in Mexico, accounting for about 30 percent of production. Sanitary problems

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

Compliance with *TIF* is key to commercially-successful operations. Vertically-integrated companies are in the best position to comply, because they control the entire process from hog production to distribution. Many of them own their own refrigerated trucks and warehouses. For these reasons, pork processing firms are beginning to integrate backwards into hog production.

SLAUGHTERHOUSES

In 1993, there were 444 municipal and private pork slaughterhouses. In addition, there were 109 plants complying with Mexico's *Tipo Inspección Federal (TIF)*, sanitary inspection standards. Twenty-five of these, representing 11 companies, are exclusively pork plants. The others are mainly beef and poultry plants, although some slaughter both beef and pork. About 80 percent of all *TIF* plants are owned and operated by the regional livestock producers unions.

PROCESSORS

There are an estimated 150 meat processing companies in Mexico, producing a wide variety of fresh pork cuts and processed pork products. They use both domestic and imported half-carcasses as well as imported carcasses and prime cuts. Foreign multinationals account for about 15 percent of production. The domestic firms benefit from a detailed knowledge of local tastes that is needed to produce many popular value-added cuts.

FOREIGN TRADE

Mexico's pork imports for 1994 have been estimated by the *Comisión Nacional de Porcicultores (CONAPOR)*, National Commission of Pork Producers, at 221,404 tonnes or about 22 percent of the market. According to official government data, imports in 1994 had a value of US \$257 million. Import penetration for 1994 was estimated by *CONAPOR* at about 24 percent by volume.

More than 30 percent of Mexican imports consist of offal. Carcasses and other unprocessed meat make up almost 30 percent and live animals about 8 percent of the total.

Import Share of the Mexican Pork Market

Year	National production in tonnes			Meat and offal	Import share
	Meat	Offal	Total	Imports in tonnes	Percentage
1990	757,851	125,601	883,452	57,303	6.49
1991	811,849	134,550	946,399	173,676	18.35
1992	819,782	135,865	955,647	200,820	21.01
1993	807,320	133,800	941,120	210,861	22.41
1994	795,048	131,766	926,814	221,404	23.89
1995	782,962	129,763	912,725	232,474	25.47
1996	771,060	127,790	898,850	244,098	27.16
1997	759,338	125,848	885,186	258,303	29.18
1998	737,795	123,935	861,730	269,118	31.22
1999	736,428	122,051	858,479	282,574	32.92
2000	755,233	120,195	875,428	296,703	33.90

Source: *Comisión Nacional de Porcicultores (CONAPOR)*, National Commission of Pork Producers.

The balance consists mostly of processed pork, including sausages, bacon, hams and other value-added products.

Canada's total pork exports to Mexico in 1994 were valued at US \$36 million, a market share of 14 percent.

Canada is mainly an exporter of raw products such as pork carcasses and frozen meat. More than half of the value of exports in 1994 was accounted for by frozen hams, offal and other pork meat. Carcasses were 16 percent of the total. About 90 percent of exported Canadian pork products end up at Mexican processors. Deli-products represent a new market and exports in this area are gradually increasing.

CUSTOMERS

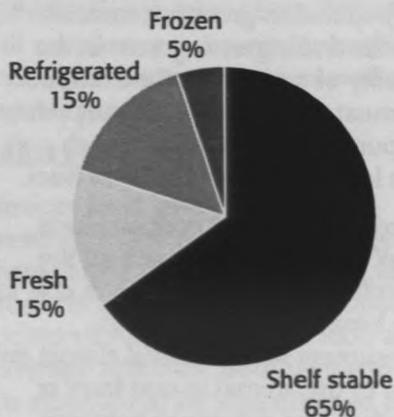
Although a large proportion of Mexicans have very low incomes by Canadian standards, the absolute numbers of people in the higher-income brackets is still relatively large. The devaluation of the peso in December 1994 has cut deeply into the spending power of most Mexicans. Those with pre-devaluation family incomes of US \$25,000 or more make up only 15 percent of the population. But there are about 13 million people in this category, and they are considered the most important market for imported foods.

As a result of the devaluation of the peso, real incomes declined by almost 10 percent in the first five months of 1995. In the middle-income groups, declining real income has a positive influence on pork demand, because it encourages substitution for beef. In the lower income groups, the consumption of all meats is likely to decline.

RETAIL STORES

The Mexican retail sector is highly diverse. On one hand, it has a very large number of small retail outlets often referred to as "mom and pop" stores. There are only 300 people per retail unit compared with about 900 in Canada. On the other hand, the market is dominated by very large retail supermarkets, which account for 40 percent of sales, with only 5 percent of outlets. Experts predict that the market share of supermarkets will expand further to about 70 percent over the next several years.

Mexico Supermarket Shelf Space



Source: Interviews.

FOOD SERVICE SECTOR

The food service sector includes hotels, restaurants and caterers. Some of them import high-quality pork products. Many major hotels buy prime cuts, which they further cut and process in their own facilities. Some restaurants and restaurant chains also purchase imported pork products. For example, VIPS is a nation-wide restaurant chain which imports full truckloads (FTL) directly from foreign suppliers.

IMPORTERS AND DISTRIBUTORS

Importers and distributors include the *Centrales de Abastos* which are

large distribution hubs in urban areas that bring together smaller brokers, import agents and concessionaires. They play an important role in distributing products which are imported in relatively small volumes. On the other hand, they add as much as 30 percent to product cost, and many foreign suppliers prefer to deal directly with retailers for food service establishments.

COMPETITION

The Mexican pork processing industry is dominated by a group of large firms. Most are either Mexican-owned or have alliances with foreign companies. The formal supply of processed meat is dominated by *Sigma Alimentos*. *Sigma* imports about 20 percent of its sales, mainly through a joint venture with Oscar Meyer. *Zwanenberg*, another major producer, buys imported meat because of the shortage of carcasses that meet *Tipo Inspección Federal (TIF)*, sanitary inspection standards.

The most important types of meat produced by the Mexican pork processing industry are cold-cuts, sausages and smoked products. These account for 300,000 tonnes of processed meat annually. Other important products include ready-to-cook cuts for the taco industry as well as certain pre-cut portions for certain retailers and food-service clients.

Restructuring

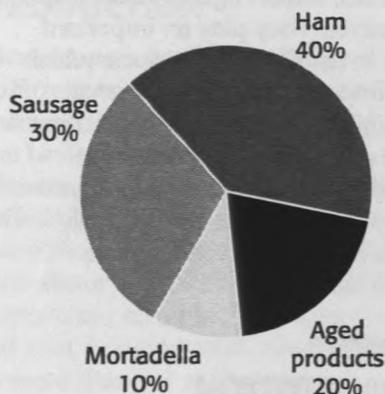
The pork industry is in the process of restructuring in response to increased competition and liberalized trade. Mexican producers believe that they have to prepare for the time when American and Canadian producers succeed in penetrating the Mexican market. The next five-to-ten years are considered a head-start.

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Market for Processed Pork



Source: Interviews.

The industry is consolidating itself. Important vertical and horizontal linkages are being forged at every level of the industry:

- hog producers are either being absorbed by processors or coming together into alliances;
- processors are expanding vertically. Some are acquiring breeding facilities, others are developing or buying into their distribution network;
- some processors are creating horizontal links with American producers and processors, for example, the alliance between *Sigma Alimentos* and John Morell; and
- independent distributors are forming alliances in order to cut costs, limit risks and improve service.

This restructuring trend is already evident in many parts of the industry. It is expected that the North American Free Trade Agreement (NAFTA) and recent agrarian reforms will accelerate this trend.

Foreign Competitors

The United States dominates the market for imported pork. Some importers deal exclusively in American products, often in association with firms in the United

States. Other important sources of imported pork are Spain and Denmark.

Canadian pork enjoys a very good reputation in Mexico. In comparison to American pork, Canadian products are perceived as having better texture, containing less salt and being less greasy. The genetic stock of Canadian pork is considered superior to American pork. High-quality Mexican pork is considered superior to both American and Canadian products.

PRODUCT TRENDS AND OPPORTUNITIES

Consumer demand is driven mainly by population growth, seasonal trends and a growing trust in the quality of pork meat. Consumption of meat of all kinds is directly related to purchasing power, although pork is a lower-cost substitute for beef.

Mexican buyers of pork products seek to fill their lines with all the possible types of cuts. This is due to the broad tastes of Mexican consumers who demand almost any part of the animal in one form or another. The difference between buyers is mainly the quality and price range of products they carry. Some key demands are readily identifiable:

- carcasses for the in-store butcheries of the large retail stores and certain restaurants and hotels;
- high-end deli-products such as smoked meat and cold-cuts for retail stores carrying a line of prestigious goods;
- internal organs for large and small retailers located in the lower-class or semi-rural areas; and
- non-sliced or packaged cold-cuts particularly for the "mom and pop" stores.

Food service buyers frequently structure their buying lists according to the events they are holding, pre-tailored specifications, and the quality and taste preferences of the chefs. Quality tends to lead over price considerations.

OPPORTUNITIES FOR CANADIAN SUPPLIERS

Industry experts in Mexico believe that, assuming Canadian pork products continue to be price competitive relative to American products, Canada could eventually achieve a 50 percent share of the import market. They add that this would require a much larger allocation of resources for promotion. In particular, there is a need for better consumer understanding that Canadian pork is very high quality.

Mexican producers have difficulty producing high-quality, luxury deli-products as well as bacon. Mexican consumers have come to prefer American style bacon such as "Bacon-Maker". This is an exception to the general finding that consumers find American pork to be excessively greasy and salty compared with both high-quality Mexican and Canadian pork.

Mexican pork processors are interested in creating alliances with foreign producers as a means of improving their cost competitiveness and quality standards. They have a positive perception of the Canadian industry. In particular, they regard the Canadian genetic stock as superior.

DISTRIBUTION CHANNELS

The distribution system for domestic pork is complex and costly. It has been estimated that the cost of retail pork is increased 7.5 times over the producer's price for the live animal. There can be as many as five levels, or intermediaries, between the producer and the consumer.

The integrated producers have their own slaughterhouses and are able to bypass the intermediaries. They distribute approximately 80 percent of their production as carcasses or prime cuts directly to retail stores and food service establishments.

The distribution system for imported meat is much simpler than that for domestic pork. Imports usually go directly to a meat processor or to an abattoir or distributor for sale to supermarkets, butcher shops, hotels and restaurants. In general, this gives imported pork products a cost advantage.

THE REGULATORY ENVIRONMENT

SANITARY INSPECTION

The Mexican *Secretaría de Agricultura, Ganadería y Desarrollo Rural (SAGAR)*, Secretariat of Agriculture, Livestock and Rural Development, requires sanitary inspections for a wide variety of unprocessed animal products. The regulations are subject to change, and exporters will need assistance from the importer and/or a customs broker to determine the specific requirements for each product.

SECRETARIAT OF HEALTH'S SANITARY IMPORT AUTHORIZATION

The *Secretaría de Salud (SS)*, Secretariat of Health's regulations encompass a variety of processed foods and beverages, but most processed foods no longer require prior authorization. Every food importer must register with the *Secretaría de Agricultura, Ganadería y Desarrollo Rural (SAGAR)*, Secretariat of Agriculture, Livestock and Rural Development, and provide notice of all food products that will be imported. Regardless of the product involved, the importer is also responsible for obtaining

authorization for products that require a prior sanitary import authorization.

SECRETARIAT OF AGRICULTURE'S SANITARY IMPORT AUTHORIZATION

Products requiring prior sanitary authorization by the *Secretaría de Agricultura, Ganadería y Desarrollo Rural (SAGAR)*, Secretariat of Agriculture, Livestock and Rural Development, include a variety of unprocessed plant or animal products. SAGAR uses separate application forms for import authorizations for live animals and animal products. In addition to product descriptions, the forms require a specification of the intended use of the product. The authorization received from SAGAR will specify requirements for health and sanitation certificates as well as any restrictions.

LABELLING

Mexican food labelling laws are presently in the process of change. There is one regulation covering all products and another which imposes additional requirements on food and beverage products. Both regulations are expected to be strengthened in 1995, according to draft regulations

that were published for "public consultation" in June 1994.

Under the current regulations, in addition to the generic requirements, food and beverage labels must include the following:

- product description
- date of expiration
- list of ingredients
- nutritional content (if nutritional quality is claimed)

New regulations for both generic and food products are expected in late 1995 or early 1996.

MARKET ENTRY STRATEGIES

Many of the industry experts interviewed for this study expressed surprise that Canada has not been more persistent in promoting its pork products in Mexico. They regard Canadian pork as superior to American products, and believe that it would do well in Mexico, if it were effectively presented. Some observers believe that Canada could claim half of the import market.

Some of the buyers interviewed complained that they knew of no

Minimum Requirements for Spanish Labels (All Consumer Products)

1. Name of the product or good (including a product description, if not described in the name of the product or good).
2. Name or trade name and address of the importer (this information may be displayed on a separate label and may be added after importation).
3. Country of origin of the product.
4. Net contents in accordance with *Normas Oficiales Mexicanas (NOMs)*, official Mexican standards, *NOM 030-SCFI-1993*.
5. Warnings or precautions in the case of dangerous products.
6. Instructions for use, handling and/or preservation of the product.

Source: Government of Canada translation of Article Five of the March 7, 1994 Decree, as amended by letters of clarification from the *Secretaría de Comercio y Fomento Industrial (SECOFI)*, Secretariat of Commerce and Industrial Development.

source of Canadian pork and others noted that Canadian forays into the market have been sporadic and not followed up with a permanent presence.

Mexican buyers for retail and food service companies regard Canadian pork products as superior, but note that this is not necessarily perceived by consumers. Point-of-sale product promotion is common in Mexico, and retailers usually expect suppliers to support these efforts. Canadian companies can promote the quality, taste, leanness and good reputation of their products by helping retailers to convey these qualities to consumers.

At the processing level, Canadian firms can emphasize the similarity of texture, fat content and taste between Canadian and Mexican pork. They can also point out that Canadian pork has optimal pH levels and, therefore, longer shelf-life.

Many Canadian companies have found that partnerships or strategic alliances with local companies are an effective way of entering the Mexican market. Vertically-integrated companies that want to fill gaps in their product lines are often good prospects. Mexican importers and distributors may be interested in switching to Canadian products, provided that the necessary long-term marketing support is provided.

TRADE SHOWS

Participation in trade shows is a time-proven method of introducing new products and making contacts with potential customers and partners. There are several relevant shows held regularly in Mexico:

- *Expo-Guadalajara*, held annually in Guadalajara, usually in December;
- *Convención Nacional de Empacadores de Carnes Frías y Embutidos y Exposición*

Internacional de Proveedores, a national meat packers' convention and suppliers' exposition held annually during February in Monterrey;

- *Exposición y Convención Nacional de Comercio Detallista*, a national Mexican food and consumer product retailers' convention and trade show held annually during March in Guadalajara;
- *Expo-alimentos*, a food and beverage industry exhibition held annually during September in Monterrey; and
- *Abastur*, the national salon for the hotel and restaurant industries, sponsored by the International Food Service Manufacturer's Association, held in Mexico City during October.

KEY CONTACTS

CANADA

Canadian Government

Department of Foreign Affairs and International Trade (DFAIT)

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

InfoCentre

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

Note: to telephone Mexico City, dial: 011-52-5 before the number shown. 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.

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Canadian Business Centre

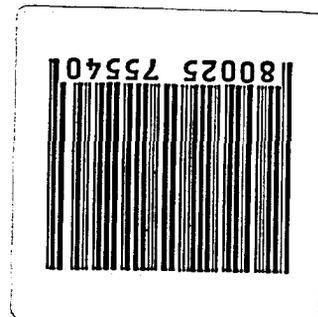
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International Trade Centres have been established across the country as a convenient point of contact to support the exporting efforts of Canadian firms. Co-located with the regional offices of the Department of Industry (DI), the centres operate under 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 market research and planning, provide access to government programs designed to promote exports, and arrange for assistance from the trade commissioners in Ottawa and trade officers abroad. Contact the International Trade Centre nearest you.

World Information Network for Exports (WIN Exports) is a computer-based information system designed by DFAIT to help Canada's trade development officers abroad match foreign needs to Canadian capabilities. It provides users with information on the capabilities, experience and interests of more than 23,000 Canadian exporters. To register on WIN Exports, call (613) 996-5701, or fax 1-800-667-3802 or (613) 944-1078.

International financing institutions, including the World Bank and the Inter-American Development Bank, provide funds to Mexico for a wide variety of specific projects. DFAIT helps Canadian exporters interested in pursuing multilateral business opportunities that are financed by international financing institutions. For further information, call (613) 995-7251, or fax (613) 943-1100.

Market Intelligence Service (MIS) 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. MIS is offered free of

charge by fax, letter or telephone. For more information, call (613) 954-5031, or fax (613) 954-2340.

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Canadian International Development Agency (CIDA)

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 (CIDA/INC). This program provides financial contributions to stimulate Canadian private-sector involvement in developing countries by supporting long-term business relationships such as joint ventures and licensing arrangements. For more information, call (819) 997-7905/7906, or fax (819) 953-5024.

Export Development Corporation (EDC)

EDC is a customer-driven, financial services corporation dedicated to helping Canadian businesses succeed in the global marketplace. EDC provides a wide range of risk management services, including insurance, financing and guarantees to Canadian exporters and their customers around the world.

EDC has established relationships with leading commercial and public sector institutions in Mexico and Latin America. Exporters can call (613) 598-2860 for more information. Smaller exporters, with annual export sales under C \$1 million, should call the Emerging Exporter Team at 1-800-850-9626. Exporters in the information technology industry can call EDC's Information Technologies

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information about doing business in
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