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THE MARKET FOR BOTTLED DRINKING WATER IN MEXICO

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CANADIAN EMBASSY, MEXICO.**

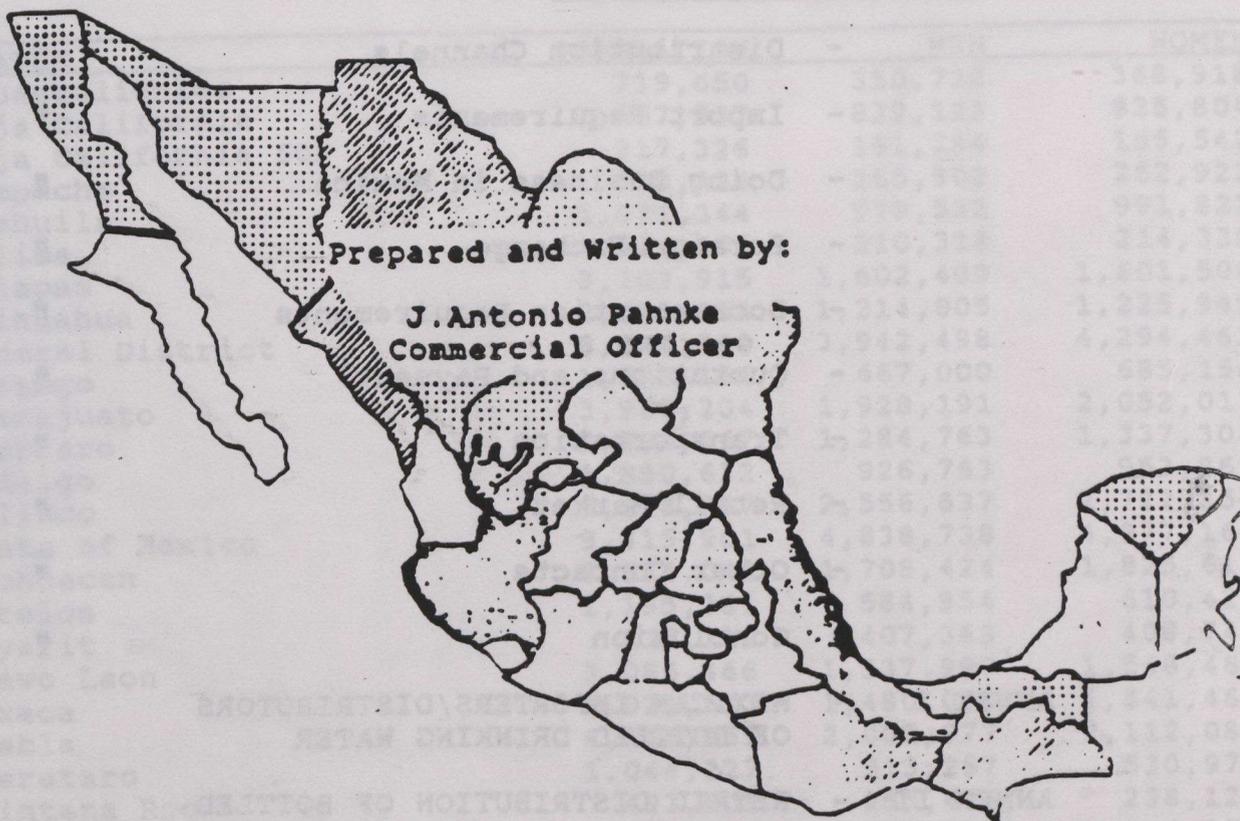
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THE MARKET FOR BOTTLED DRINKING WATER IN MEXICO

The increasing number of inquiries from Canadian bottlers or exporters regarding the marketing opportunities for their product in Mexico has prompted the preparation of this paper.



Canadian Embassy
Mexico City
Mexico

Revised February, 1992

43-2649P3

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THE MARKET FOR BOTTLED DRINKING WATER IN MEXICO

Mexico is a federal representative democratic republic with a land area of just under 2 million square kilometers, measuring approximately one-fifth the size of Canada. It is divided into 31 states and a Federal District in which the capital, Mexico City, is located. According to preliminary figures from the latest population census taken in 1990, currently there are 81,140,922 inhabitants living in Mexico, 10.2% of which reside in the Federal District. If we take into consideration the municipalities located in the State of Mexico which are adjacent to Mexico City, the number practically doubles.

TABLE I

UNITED MEXICAN STATES TOTAL POPULATION, BY SEX AND FEDERATED STATES POPULATION CENSUS 1990

| <u>STATES</u> | <u>POPULATION</u> | <u>MEN</u> | <u>WOMEN</u> |
|---------------------|-------------------|-------------------|-------------------|
| Aguascalientes | 719,650 | 350,732 | 368,918 |
| Baja California | 1,657,927 | 832,123 | 825,804 |
| Baja California Sur | 317,326 | 161,784 | 155,542 |
| Campeche | 528,824 | 265,902 | 262,922 |
| Coahuila | 1,971,344 | 979,522 | 991,822 |
| Colima | 424,656 | 210,318 | 214,338 |
| Chiapas | 3,203,915 | 1,602,409 | 1,601,506 |
| Chihuahua | 2,439,954 | 1,214,005 | 1,225,949 |
| Federal District | 8,236,960 | 3,942,498 | 4,294,462 |
| Durango | 1,352,156 | 667,000 | 685,156 |
| Guanajuato | 3,980,204 | 1,928,191 | 2,052,013 |
| Guerrero | 2,622,067 | 1,284,763 | 1,337,304 |
| Hidalgo | 1,880,632 | 926,763 | 953,869 |
| Jalisco | 5,278,987 | 2,556,637 | 2,722,350 |
| State of Mexico | 9,815,901 | 4,838,738 | 4,977,163 |
| Michoacan | 3,534,042 | 1,708,424 | 1,825,618 |
| Morelos | 1,195,381 | 584,954 | 610,427 |
| Nayarit | 816,112 | 407,369 | 408,743 |
| Nuevo Leon | 3,086,466 | 1,537,997 | 1,548,469 |
| Oaxaca | 3,021,513 | 1,480,050 | 1,541,463 |
| Puebla | 4,118,059 | 2,005,977 | 2,112,082 |
| Queretaro | 1,044,227 | 513,257 | 530,970 |
| Quintana Roo | 493,605 | 255,476 | 238,129 |
| San Luis Potosi | 2,001,966 | 987,588 | 1,014,378 |
| Sinaloa | 2,210,766 | 1,106,532 | 1,104,234 |
| Sonora | 1,822,247 | 915,585 | 906,662 |
| Tabasco | 1,501,183 | 750,305 | 750,878 |
| Tamaulipas | 2,244,208 | 1,112,105 | 1,132,103 |
| Tlaxcala | 763,683 | 376,242 | 387,441 |
| Veracruz | 6,215,142 | 3,075,679 | 3,139,463 |
| Yucatan | 1,363,540 | 674,187 | 689,353 |
| Zacatecas | 1,278,279 | 625,424 | 652,855 |
| TOTAL | 81,140,922 | 39,878,536 | 41,262,386 |

Source: INEGI - XI CENSO GENERAL DE POBLACION Y VIVIENDA, 1990

Prior to Mexico's accession to the General Agreement on Tariffs and Trade during the administration of ex-president Miguel de la Madrid Hürtao (1982-1988), imports of bottled (natural and/or carbonated) water were marginal. The demand for bottled water, consisting mainly of carbonated spring water and potable water further treated by ultraviolet, reverse osmosis and other processes, was supplied by domestic bottlers.

It has often been stated that there is a serious shortage of fresh water in Mexico. This may certainly be true in some desert regions of the country, where rainfall is scarce and periodic long dry spells occur. However, there are numerous underground bodies of water in various regions, some of which are high in sulphur content and not fit for human consumption, or are harnessed and used for recreational purposes or spas. In several Mexican states, underground springs have supplied fresh water and have been exploited for many years by domestic bottling companies.

Imports

Traditionally, the import market has been dominated by the USA. In 1985 the value of imported bottled water supplied by that country amounted to US\$784; in 1988 the USA accounted for 95.5% of the total import value of \$102,606 dollars. Imports of pure mineral water more than quadrupled in 1989, but the dominant player in the supply pattern was France which accounted for 63.6% (USA 16.8%) of the total import value. In 1990 this percentage position remained fairly constant. The past few years have seen a proliferation of brands from other nations coming into the market at the commercial level, including product from Germany, Italy, France, Spain and Israel. Domestic bottlers have also stepped up their supply of bottled drinking water (both mineral and purified), in response to the competition from foreign suppliers and the consumer demand for healthier product.

But significant increases have been recorded for sweetened and/or flavoured mineral and carbonated water, which more than doubled in 1990 from the previous year. In this category the USA predominates the import market, accounting for 97.5% in 1989 and 97.9% in 1990.

TABLE II MEXICAN IMPORTS OF BOTTLED DRINKING WATER
(Values in United States dollars)

| | 1989 | 1990 |
|-----------------------------|---------|---------|
| Pure, natural mineral water | 600,394 | 652,872 |

| | | |
|---|-----------|-----------|
| Carbonated mineral water | 223,207 | 502,817 |
| Potable water | 142,357 | 545,984 |
| <hr/> | | |
| Mineral and carbonated water, sweetened and/or flavoured | 2,757,348 | 5,912,268 |

Source: Secretaría de Comercio y Fomento Industrial

International Trade Policy

Mexico became a member of the GATT in September, 1986 subject to reciprocal tariff treatment with other member nations. As a founding member of the former Latin American Free Trade Area (LAFTA), revised in 1980 as Latin American Association of Integration (ALADI), Mexico exchanges certain preferences with other ALADI member countries. Mexico and Canada signed a reciprocal trade treaty in 1946, and Mexico enjoys "Most Favoured Nation Treatment" on Mexican commodities entering Canada. In July 1974 Canada further extended to Mexico special treatment under its "General Preferential Tariff" ruling, allowing for a wider spectrum of Mexican natural and manufactured goods to enter Canada at reduced tariff rates. In 1988, both Mexico and Canada adopted the harmonised customs system (HS) currently in use. Since May 1989, Mexican ad valorem import duties range from a minimum of 5% to a maximum of 20%, with certain commodities enjoying exemption from import duty payment.

Import Duties and VAT

Classifications for drinking water under the Harmonised System are as follows: 22.01.1001 mineral water; 22.01.1002 carbonated water; 22.01.9001 potable water; 22.02.1001 sweetened and/or flavoured mineral and/or carbonated water. These commodities are subject to 20% ad valorem duty, except for simple non-mineral, non-carbonated purified (potable) water which pays 10%. A 10% Value Added Tax is applicable, along with customs broker charges.

Distribution Channels

Imported bottled water is distributed wholesale in the market by importers, distributors or representatives of foreign suppliers. These companies sell to retail outlets including supermarket chain stores, department stores, leading restaurants, hotels and tourist resorts, etc. Bottled drinking water of domestic origin is

distributed throughout the country via distributorships established by individual companies or "concessions" which handle a variety of brands by volume. ANNEX I identifies the Mexican companies that import and distribute bottled drinking water, the companies which they represent and their respective countries of origin.

Import Requirements

In order to facilitate the movement of food and beverage products in the market, the Ministry of Health announced recently that it is no longer necessary for such commodities to carry a registration number. However, the importer or representative should send a written notice to the Ministry of Health that the product is being presented for sale in the marketplace. The intention is that the demand will dictate whether or not a product stands up to consumer preferences and remains in the market. The department within the Ministry responsible for the food sector is:

Dirección General de Control
Sanitario de Bienes y Servicios
Secretaría de Salud
Donceles No. 39, Piso 1
Col. Centro
06010 Mexico, D.F.
Tel.: (5) 510-3999, 512-9283, 521-3050

Products may be sold with their original labels affixed. It is still necessary, however, for the foreign supplier and the importer to be identified. This is normally done by the importer, by placing a sticker on each individual package, can or bottle, in Spanish, containing the producer's and/or the exporter's name and address, the importer's data, country of origin and other relevant data. As mentioned earlier, a registration number is no longer required.

Doing Business in Mexico

For the inexperienced Canadian company or individual who is interested in doing business in Mexico, a visit to the nearest International Trade Center is recommended as a starting point to obtain preliminary information on the Mexican marketplace. The following chapters will indicate some of the aspects that should be carefully considered, if any degree of success is to be achieved.

Foreign Exchange

There has been some concern among a few Canadian companies as to

whether Mexican import firms have access to the necessary foreign exchange to cover the costs of imported goods. Mexico does not exercise any control on the transfer of foreign exchange outside the country. Irrevocable letters of credit, bank drafts, money transfers or any other accepted means of payment are readily available through the banking system or money exchange houses. To give the economy more dynamism and efficiency and enable it to respond to the challenges which Mexico will be facing under the North American Free Trade Agreement in future, the present administration has instituted a process to re-privatize the national banking system. At this writing, eleven of eighteen banks have been sold back to the private sector.

Documentation Requirements

Canadian exporters should request detailed instructions from their Mexican customers regarding the documentation requirements that must be complied with. The adherence to such instructions will greatly facilitate the documentation of the goods through Mexican customs and their entry into the country. Failure to comply strictly with these requirements can signify fines to the customer, demurrage costs due to delays at the border and, in extreme cases, the return of goods to point of origin. Mexican importers must apply for and obtain sanitary and/or phytosanitary rulings from the respective ministries for food, animal and plant products prior to importing. Copies of such regulations accompanying shipping papers will usually serve to facilitate border inspection, clearance and entry.

Commercial invoices must be prepared in Spanish (original and seven copies) and visaed at the Mexican Embassy or Consulate in Canada. Bills of lading for ocean, rail, road and air shipment are also required. If the invoice is written out in another language, a translation signed by the exporter, consignee or customs broker attached to the invoice will be accepted by Mexican customs.

Experienced Mexican importers can usually provide the exporter with the name of a customs broker to whom the goods should be consigned. The broker will take responsibility for clearing the goods through customs and forwarding to final destination.

Quotations and Payment

Unless otherwise indicated by the importer, price quotations should be given in U.S. dollars. The usually accepted modes are F.O.B. plant plus freight; F.O.B., C.I.F. or C.A.F. mid-bridge or point of entry. It is then the customer's responsibility to have the goods cleared through customs, payment of import duties and taxes,

transshipment from the border to destination, etc.

Mexican customers should be fully informed, and agreeable to, the terms and conditions of payment required by Canadian exporters. The Irrevocable Letter of Credit is one of the accepted means of payment, although some importers prefer to effect payment by other instruments such as bank transfer, sight draft, cashier's cheque, international money order, etc. which are less expensive to obtain. In any case, for their own protection, Canadian exporters should ensure that monies are in their banks and available for collection on presentation of shipping documents, invoices, etc. Foreign exchange is readily available through the Mexican banking system for international transactions.

Transportation

Goods moving from Canada to Mexico travel primarily by truck or railcar. Several Canadian trucking firms have established contracts with Mexican counterparts to transport freight overland through the U.S. into Mexico. By law, a Mexican cab and driver must be used to haul loads over local highways to destinations inland. U.S. rail systems connect with Mexican road and railways systems at major border crossings. Direct air cargo services to Mexico City are available from Toronto with Canadian International, and Vancouver via Japan Airlines. Other important Mexican cities including Chihuahua, Hermosillo, Guadalajara, Monterrey and others have direct air connections from major cities in the U.S.

Retail Market

With the relaxation and elimination of certain import restrictions and barriers to trade since Mexico became a member of the General Agreement on Tariffs and Trade, there has been a significant increase in the variety of imported goods, including bottled drinking water. A considerable number of brands previously unknown in Mexico can be found today on supermarket shelves. The Mexican food and beverage market is in expansion, and for a product to find a niche in this highly competitive marketplace, it must be well presented and competitive in price and quality. It takes a lot of dedicated effort and promotion to introduce a foreign product, and the competition in the drinking water market (as will be seen from the number of brands currently available to the consumer) is strong. A survey taken in several commercial outlets gives the variety in bottle sizes and retail prices currently in effect. The Mexican peso slips 0.20 centavos each day, and at this writing the exchange rate is \$3,105 pesos per U.S. dollar.

Other Contacts

A list of the local companies that import and distribute foreign brands of drinking water is given in ANNEX I. Apart from these, there are other firms that are engaged in the importation and distribution of food products and beverages. They may be approached to determine if any interest exists in handling this commodity. A revised list of these contacts is given in ANNEX III.

As indicated earlier, Mexico also bottles natural mineral and carbonated water. The list of domestic bottlers is long and ANNEX IV provides data on the most important ones, together with the brand names which they market.

Conclusion

This paper attempts to provide useful information to the Canadian company that is interested in exploring marketing opportunities for its product in Mexico. Every effort has been made to include the most up-to-date data. However, this work is not intended to be an in-depth market report, and the writer accepts no responsibility for omissions or inaccuracies. Further information may be requested from the Commercial Division of the Canadian Embassy, and the post will do its utmost to provide it, depending on its availability.

Canadian Embassy
Commercial Division
Schiller 529
Col. Polanco
11580 Mexico, D.F.
Tel: (011-525) 254-3288
Fax: (011-525) 545-1769
Telex: 1771191 Asnwerback DMCNME

ANNEX I

MEXICAN IMPORTERS/DISTRIBUTORS OF BOTTLED DRINKING WATER

Local Company

G.E.N., S.A. de C.V.
Cerrada Primavera No. 15
53000 Naucalpan, Edo. de México
Tel: (5)350-5436

Importaciones y Representaciones
Star, S.A. de C.V.
Río San Joaquín 724, 3er. Piso
Col. 10 de Abril
11250 México, D.F.
Tel: (5)580-0480; Fax: (5)395-6417

ABESA, de C.V.
Melchor Ocampo 193- E 7
Col. Verónica Anzures
11300 México, D.F.

Distribuidora Puig, S.A.
M. de Cervantes Saavedra 57
Col. Granada
11520 México, D.F.
Tel: (5)531-3551; Fax: (5)203-5311

Fomento y Representaciones
Ultramar, S.A.
Descartes 54 - 3
Col. Anzures
11590 México, D.F.

Howe, S.A. de C.V.
Monterrey 365
Col. Roma Sur
06760 México, D.F.

Jaymex de México, S.A. de C.V.
Centeno 833-B
Col. Granjas México
08400 México, D.F.
Fax: (5)650-0613

Gigante, S.A. de C.V.
Av. Ejército Nacional 769-A
Col. Nueva Granada
11520 México, D.F.
Tel: (5)545-5161, 250-3011
Fax: (5)250-9171

Brand, Producer & Origin

Glacier
Western Canada Water
Canada

Ambrosia
Premium Water Company
U.S.A.

Fonte Limpia & Pellegrino
San Pellegrino SPA
Italy

Perrier
Perrier
France

Evian
S.A. des Eau Minerales
France

Apolinaris
Apolinaris Brunner
West Germany

Solares
Manantiales de Fuencaiente
Spain

Fonte S. Moderrano
Berceto Parma
Spain

Nevoit/Ares Ltd.
Israel

PURIFIED

AGUA PURIFICADA LAS FUENTES

Poder Ejecutivo No. 21
Tel. (91-73) 14-38-30
Cuernavaca, Mor.

AGUA PURIFICADA MODELO

Juárez No. 867 Ota.
Tel. (91-671) 320-30
Cuicacán, Sin.

AGUA PURIFICADA SOL

Las Hayas No. 42
Tel. (91-281) 721-69
Col. Reforma
Xalapa, Ver.

AGUA Y HIELO DEL DISTRITO

FEDERAL, S.A. DE C.V.

Nautla No. 29
Tel. 564-74-75
Fax: 564-24-89

Col. Roma Sur
06760 México, D.F.

AGUAS PURIFICADAS DE MEXICO

Naranja No. 348
Tels. 547-93-40 y 547-93-20
Col. Sta. Ma. la Ribera
06400 México, D.F.
Agua purificada AGUAPURA.

AGUAS PURIFICADAS LA VICTORIA

27 de Febrero No. 1789
Tel. (91-931) 355-66 y 355-77
Col. Alasta
Villahermosa, Tab.

AGUASED

Bvd. García de León No. 87
Tel. (91-451) 464-38
Morelia, Mich.
Agua purificada.

AQUA VITA

Vasconcelos Pte. No. 675-2
Tel. (91-83) 38-19-20
66200 San Pedro Garza García, N.L.
Agua purificada y agua desmineralizada.

CELANESE MEXICANA, S.A.

Av. Revolución No. 1425
Tels. 548-69-60 y 548-57-74
Fax: 550-22-25 y 550-46-18
Telex: 17-72431 CELAME
Col. Tlacopac
01040 México, D.F.
Fabricante de resina PET, materia prima para fabricación de envases de agua purificada.

DISTRIBUIDORA DE AGUA PURIFICADA, S.A. DE C.V.

Camino a la Huasteca No. 354
Tels. (91-83) 36-32-11 y 36-31-47
Sta. Catarina, N.L.
Agua purificada HUASTECA.

ELECTROPURA, S.A. DE C.V.

Bahía de Párua No. 34
Tels. 545-71-83, 531-41-90 y 545-07-71
Col. Anáhuac
11300 México, D.F.
Aguas purificadas e industriales.

EMBOTELLADORA O'KEY DE CORDOBA, S.A.

Km. 342 Carr. Córdoba-Veracruz
Tels. (91-271) 212-12 y 221-12
Córdoba, Ver.
Agua purificada MEYALLI.

GARDEL S.A.

Elias Reynoso S. No. 307
Tels. (91-83) 58-32-16 y 58-53-66
Monterrey, N.L.
Agua purificada GARDEL.

INDUSTRIAL ZAZ, S.A. DE C.V.

Tamaulipas No. 125 Esq. Naranja
Tels. (91-62) 15-61-95, 15-67-76 y 15-62-49
Hermosillo, Son.
AGUALAB, AGUADEST y AGUAPURA.

PLANTA ELECTROPURA DE YUCATAN, S.A.

Calle 29 No. 149 x 36 y 38
Tel. (91-99) 27-05-89
Col. Buenavista
Mérida, Yuc.
Planta electropura.

PRODUCTOS RALIN DE COZUMEL, S.A. DE C.V.

35 Av. Sur No. 700
Tel. (91-987) 206-29
77600 Cozumel, Q. R.
Hielo y agua purificada.

PURIFICADORA DE AGUA LA LOMITA

Priv. la Lomita No. 1607
Tel. (91-14) 15-22-56
Col. Mirador
31270 Chihuahua, Chih.

PURIFICADORA DE HERMOSILLO, S.A. DE C.V.

Carr. a Tecoripa Km. 3
Tels. (91-62) 12-12-93 y 17-43-37
Hermosillo, Son.
Agua purificada FRESC.

PURIFICADORA DONAJI

Priv. Fray A. Garay No. 110
Tel. (91-951) 565-20
Oaxaca, Oax.

SAN JUAN

Carr. a Reynosa No. 1328
Tel. (91-83) 37-23-02
Guadalupe, N.L.
Agua purificada SAN JUAN.

AGUA DESTILADA GARVI, S.R.L.

Jerez No. 128
Tel. (91-83) 47-39-67
Col. Mitras Centro
Monterrey, N.L.
Agua purificada GARVI.

AGUA ELECTROPURA BEBE, S.A.

Av. Juárez No. 1303 Nte.
Tels. (91-83) 75-02-69 y 75-76-20
64490 Monterrey, N.L.

AGUA PURIFICADA CALIFORNIA

Perú No. 319 Esq. Belice
Tel. (91-491) 821-40
Fracc. Sta. Elena
20230 Aguascalientes, Aga.
Hielitos FALI, agua CALIFORNIA.

AGUA PURIFICADA CRISTAL

España No. 704
Tel. (91-491) 807-30
20210 Aguascalientes, Aga.

AGUA PURIFICADA FRESKAGUA

Calle 9 No. 308
Tel. (91-271) 218-62
Córdoba, Ver.

AGUA PURIFICADA GEISER

Elias Reynoso Santana No. 307
Tels. (91-83) 59-01-06 y 59-01-11
Col. Buenos Aires
Monterrey, N.L.

AGUA PURIFICADA KABALA

Gonzales Ortega No. 3913
Tel. (91-14) 13-52-08
Col. Granjas
Chihuahua, Chih.
Agua KABALA, servicio a empresas.

EL MANANTIAL

Netzahualcoyotl No. 8
Tel. (91-678) 399-99
Col. López Mateos
Mazatlán, Sin.
Agua electropura.

SUPER AGUA

Carr. a la Resurrección No. 5426
Tels. (91-22) 35-20-85 y 35-23-30
Puebla, Pue.
Agua purificada y destilada.

Sr. Luis Martín Rivera
IMPORTADORA Y DISTRIBUIDORA UCERO, S.A. DE C.V.
Fuerza Aérea Mexicana No. 128
Col. Federal
15700 México, D.F.
Tel: (5) 762-7055, 762-8543
Fax: (5) 785-4433

Sr. Elías A. Lima
Av. Juárez No. 127-10
Col. Centro
06030 México, D.F.
Tel: (5) 535-7516, 535-7519

Sr. Vicente Ariztegui
FIMEXPO, S.A. DE C.V.
Plaza Necáxa No. 2 - 2
Col. Cuauhtémoc
06500 México, D.F.
Tel: (5) 533-6292, 533-6294
Fax: (5) 207-8599

Sr. Alfredo Chávez
COMERCIALIZACION, IMPORTACION
EXPORTACION, S.A. DE C.V.
Comté No. 135
Col. Anzures
11590 México, D.F.

Sr. Sabetay Arguete
ALIMENTOS LAIMA, S.A.
Ayuntamiento No. 13
Col. Centro
06030 México, D.F.
Tel: (5) 521-7019, 521-6351, 512-4957
Fax: (5) 518-3882

Sr. Indalecio Fernández
Sales Manager
DISTRIBUIDORA PUIG, S.A.
París 255
Col. Del Carmen
Coyoacán, México, D.F.
Te; (5) 554-2903, 554-8692
Fax: (5) 554-2874

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COMERCIALIZADORA MEXICANA TOMI, S.A. DE C.V.
Barranca del Muerto 525, 3er Piso
Esq. Otoño
Col. Mercéd Gómez
03930 México, D.F.
Tel: (5)680-7315, 680-4188, 368-8837, 368-8839
Fax: (5)660-9531

Sr. Mario Zarur
EL PUERTO DE BEIRUT, S.A. DE C.V.
Villahermosa No. 6, 1er Piso
Col. Condesa
06100 México, D.F.
Tel: (5)277-3433, 277-3702
Fax: (5)277-6553

Sr. John Moore
MORI EXPORTADORA DE MEXICO, S.A. DE C.V.
Adolfo Prieto 1638-B
Col. del Valle
03100 México, D.F.
Tel: (5)524-1047, 524-1588, 563-3715
Fax: (5)524-0128, 531-9755

VENDITODO, S.A. DE C.V.
Homero 502
Col. Polanco
11560 México, D.F.
Tel: (5)255-2541
Fax: (5)545-0207

LOMELI INTERNATIONAL TRADE CENTRE
López Mateos Norte 400, Piso 5
Guadalajara, Jal., México
Tel: (36)163-122, 163-128, 163-127
Fax: (36)163-171

JAYMEX DE MEXICO, S.A. DE C.V.
Centeno 833-B
Col. Granjas México
08400 México, D.F.
Tel: (5)650-0613
Fax: (5)650-0613

GRUPO MADONNA
Venustiano Carranza 24-C
Col. Lázaro Cárdenas
Naucalpan, Edo. de Méx.
Tel: (5)709-9526, 709-8524
Fax: (5)709-7410

ANNEX II

RETAIL DISTRIBUTION PRICES OF BOTTLED DRINKING WATER
(Prices in Local Currency)

| <u>Brand Name</u> | <u>Bottle Size</u> | <u>Superama</u> | <u>Aurrera</u> | <u>Gigante</u> |
|----------------------|--------------------|-----------------|----------------|----------------|
| Pellegrino | 1.5 lts. | 5,447 | - | - |
| Fonte Limpia | 1.5 lts. | 5,650 | 5,650 | - |
| Canada's Heritage | 1.5 lts. | 3,950 | - | - |
| Alpina (p) | 1.5 lts. | 2,850 | - | 2,945 |
| Ambrosia | 1.5 lts. | - | 3,950 (*) | 4,950 |
| Ambrosia (*) | 3.7 lts. | 6,450 | - | - |
| Ambrosia (*) | 9.4 lts. | 17,750 | - | - |
| Hayat (*) | 1.5 lts. | - | 3,450 | - |
| Evian | 1.0 lt. | - | 4,350 | - |
| Evian (*) | 1.5 lts. | - | 5,250 | - |
| Gabal (*) | 1.5 lts. | - | 1,650 | - |
| Santa María | 1.5 lts. | - | 3,660 | - |
| Osmopura | 1.5 lts. | - | 2,400 | - |
| Agua Pura | 1.0 lt. | - | 1,780 | - |
| Aurrerá (*) | 1.5 lts. | - | 1,700 | - |
| La Noria (p) | 1.5 lts. | - | 2,750 | - |
| Mundet (p) | 1.5 lts. | - | 2,460 | - |
| Mundet (p) | 3.7 lts. | - | 4,500 | - |
| Aguas de Sierra | 1.5 lts. | - | - | 2,735 |

Notes: (*) denotes discount sale price of 20%; Hayat 10%; Evian 3.6%; Gabal 34%.
(p) denotes purified water (all others natural spring water)

Survey conducted February 25, 1992

MEXICAN IMPORTERS/DISTRIBUTORS OF BOTTLED DRINKING WATER

Local Company

Alimentos Siral, S.A. de C.V.
Puente Juárez 190
54090 Tlalnepantla, Edo. de México

Cía. de Comercio Exterior F.C.,
S.A. de C.V.
Emilio Castelar 230 - 9
Col. Polanco
11560 México, D.F.

Jona Internacional, S.A. de C.V.
Blvd. Toluca 13, 1er Piso
Fracc. Alce Blanco
Naucalpan, Edo. de México

Brand, Producer & Origin

Canada's Heritage
Nora Beverages
-Canada

Aguas de Sierra
Spain

Hayat
Turkey

ANNEX III

MEXICAN IMPORTERS, AGENTS, REPRESENTATIVES & DISTRIBUTORS
OF PROCESSED FOOD PRODUCTS AND BEVERAGES

Ing. Eduarگو Morales
Director General
SAT-COM, S.A. DE C.V.
Av. Ejército Nacional 728, 3er piso
Col. Polanco
11550 México, D.F.
Tel: (5)254-1852, 545-9593, 255-4588
Fax: (5)531-3028

Sr. David Cheren
PETRO CORPORATION INTERNATIONAL
Calle 5 No. 24-F
San Bartolo Naucalpan, Edo. de Méx.
Tel: (5)360-0231, 360-1082
Fax: (5)562-9017

Sr. Isaac Cojab
SUPER IMPORTADO
Cofre de Perote 244-B
Lomas de Chapultepec
11000 México, D.F.
Tel: (5)202-4127

Sr. Eduardo Chávez Ponce
G.I. URBI, S.A. DE C.V.
Lafayette 14
Col. Anzures
11590 México, D.F.
Tel: (5)254-1803

Sr. Francisco Rivera Duarte
CIA. EUROLATINA DE COMERCIO, S.A. DE C.V.
Anatole France 27
Col. Polanco-Reforma
11550 México, D.F.
Tel: (5)570-6659, 570-6679

Sr. Pablo Oria
INDUSTRIAL SIDRERA, S.A.
Paseo Jacarandas 328 Altos
Col. Sta. María Insurgentes
06430 México, D.F.
Tel: (5)547-9336, 547-9337
Fax: (5)541-0557

ANNEX IV

MEXICAN BOTTLERS OF MINERAL AND PURIFIED DRINKING WATER

MINERAL

AGUAS MINERALES DE COYAME, S.A.
Carr. Costera del Golfo Esq. Jaime Nunó
Tels. (91-294) 300-80 y 300-83
Catemaco, Ver.
Agua mineral COYAME.

**ARTICULOS MUNDET PARA
EMBOTELLADORES, S.A.**
Sabino No. 329
Tels. 541-32-40 y 547-90-09
Col. Sta. Ma. La Ribera
06400 México, D.F.
Sidral MUNDET y otros refrescos.

**BALNEARIO Y MANANTIALES DE
LOURDES, S.A. DE C.V.**
Francisco Zarco No. 389
Tels. (91-48) 12-31-32, 12-83-13 y 14-06-06
San Luis Potosí, S.L.P.
Aguas minerales AGUAS DE LOURDES.

CARTA BLANCA DE CD. JUAREZ, S.A.
Henry Dunant No. 5155
Tels. (91-16) 16-73-01 al 03
Col. Progresistas
Cd. Juárez, Chh.
Agua mineral PERAFIEL

CASA GUAJARDO, S.A.
Av. Universidad Norte No. 3671
Tel. (91-83) 51-52-06
Fax: (91-83) 31-32-68
Monterrey, N.L.
Agua mineral LA FUENTE.

**CERVEZA CORONA DE GUADALAJARA,
S.A. DE C.V.**
Ruiz de Alarcón No. 857 esq. Mariano Otero
Tels. (91-36) 22-93-93 y 22-90-80
Guadalajara, Jal.
Agua mineral TEHUACAN y GARCÍ-CRESPO.

**CERVEZAS Y REFRESCOS DE JALAPA,
S.A. DE C.V.**
Av. Lázaro Cárdenas No. 521
Tels. (91-281) 422-11 y 522-11
Xalapa, Ver.
Agua mineral PERAFIEL

CODICOME DEL CENTRO, S.A. DE C.V.
Diagonal 14 Pte. No. 3324
Tels. (91-22) 48-04-44 y 48-02-19
Col. Villa San Alejandro
Puebla, Pue.
Agua mineral PERAFIEL

COMERCIAL CHAVEZ GONZALEZ, S.A.
Paseo Bolívar No. 718-A
Tels. (91-14) 15-33-89 y 16-65-85
Fax: (91-14) 15-28-86
Chihuahua, Chh.
Agua mineral PERAFIEL

**COMERDIS DE OCCIDENTE,
S.A. DE C.V.**
Petróleos Mexicanos No. 503
Tels. (91-491) 452-18, 454-93
455-44 y 452-27
Aguascalientes, Ags.
Agua mineral PERAFIEL

CIA. TOPO-CHICO, S.A.
Salinas No. 1417
Tel. (91-83) 76-90-00
Col. Topo Chico
64260 Monterrey, N.L.
Embotelladores de agua mineral TOPO CHICO.

**DISTRIBUIDORA DE XALAPA,
S.A. DE C.V.**
Av. Lázaro Cárdenas y Rafael Valenzuela
Tels. (91-281) 517-23, 511-88 y 517-77
Col. Rafael Lucio
Xalapa, Ver.
Agua mineral de tehuacán GARCÍ-CRESPO.

DISTRIBUIDORA PERAFIEL, S.A.
Norte 31-A No. 60
Tel. 587-10-22
Col. Nva. Industrial Vallejo
07700 México, D.F.

DISTRIBUIDORA SABE, S.A.
Priv. Chihahépetl No. 2308
Tel. (91-22) 40-16-43
Col. Volcanes
72090 Puebla, Pue.
Agua mineral de manantial ETIQUETA AZUL

**EMBOTELLADORA AGUASCALIENTES,
S.A.**
Av. de la Convención de 1914 Sur No. 1102
Tel. (91-491) 544-88
Aguascalientes, Ags.
Agua mineral de tehuacán EL RIEGO.

**EMBOTELLADORA GARCÍ-CRESPO,
S.A.**
Campos Eliseos No. 345-14a. Piso
Tels. 202-30-52 y 259-17-68
Col. Chapultepec Polanco
11560 México, D.F.
Embotelladores de agua mineral gasificada y
natural, de sabor y luna.

EMBOTELLADORA LA FAVORITA, S.A.
Av. Vallarta No. 3300
Tels. (91-36) 16-82-10, 16-82-11 y 16-82-15
Guadalajara, Jal.
Agua mineral de tehuacán EL GRIEGO.

EMBOTELLADORA SAN LUIS, S.A.
Glorieta Juárez Lado Ota.
Tel. (91-48) 18-16-33
San Luis Potosí, S.L.P.
Agua mineral TOPO CHICO.

**EXTRACTORA Y EMBOTELLADORA D
AGUAS MINERALES, S.A. DE C.V.**
Carr. Zapopan-Tesistán Km. 2.5
Tels. (91-36) 21-87-75, 22-46-59 y 47-40-
45200 Tesistán, Jal.
Agua mineral PERAFIEL

PRODUCTOS BALSECA, S.A.
Calle Adolfo L. Mateos s/n
Km. 2.5
Tels. (91-238) 208-82, 201-82 y 202-82
Apto. Postal 5
75700 Tehuacán, Pue.
Agua mineral BALSECA

MAC'MA, S.A. DE C.V.
Arroz 180
Fracc. Industrial Santa Isabel
Col. Iztapalapa
09820 México, D.F.
Tel: (5) 581-8500

Sr. David Hennessy
Director General
IMPORTADORA Y DISTRIBUIDORA
MEDJUGORJE, S.A. DE C.V.
Sm. 63, Lote 4, Manzana "L"
Calle 11 Norte
Cancún, Q. Roo, México
Tel: (988) 30365, 72707
Fax: (988) 30773

Lic. José Luis Villaseñor
Pico de Tolima No. 29
Jardines de la Montaña
14210 México, D.F.
Tel: (5) 660-4504, 652-9644
Fax: (5) 568-4188

Sr. Alejandro Bretón
Purchasing Manager
MAYAB EMPACADORA DEL CARIBE, S.A. DE C.V.
Coruña 161
Col. Alamos
03400 México, D.F.
Tel: (5) 530-4773, 538-1361
Fax: (5) 530-4773

Sr. Salvador de la Parra
EL TRIUNFO (C/O Cremería Cotija)
Local 2-57 Letra E
Central de Abasto
Aztapalapa, México, D.F.
Tel: (5) 694-0620, 694-2298
Fax: (5) 694-1448

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DUE DATE

| DATE DUE | DATE DE RETOUR | | |
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Pahnke, J. Antonio

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