

63251950 (E)

doc
CA1
EA612
97A52
ENG

Animal Feed Products



THE OPPORTUNITY

Mexico's animal feed sector offers interesting opportunities for Canadian producers.

- Mexico is a net importer of both prepared feeds and the raw materials used to make them.
- Domestic production of balanced feeds fell by more than 11 percent in 1995 and producers are anxious to modernize to meet the influx of competition under liberalized trade.
- Changes to Mexico's *ejido* system of communal land tenure are encouraging the formation of vertically-integrated agricultural cooperatives.
- There has been a recent trend towards the use of prepared pet food for dogs and cats, which has not been traditional in Mexico.

FEEDING MEXICO'S ANIMALS

Animal feed that is used in Mexico, as in the rest of the world, consists of natural grasses, forage, mixtures of grain and manufactured, balanced rations. Mexico relies more heavily

on natural grasses for raising beef and dairy cattle than most developed countries. A large proportion of Mexican beef is exported to the United States as feeder calves, and then re-imported as carcasses or boxed beef. But the domestic pork and poultry industries are heavily dependent on grain mixtures and manufactured feed preparations.

Mexico was the world's fourth-largest importer of the cereals typically used for animal feed (corn, sorghum, barley, rye and oats) in 1995. Mexican purchases could reach some 10 million tonnes by the end of the century. Since it is not possible to entirely separate cereals used for human and animal consumption, this market summary focuses mainly on preparations designed as balanced animal feed or as raw material for its manufacture.

Agricultural markets were severely disrupted by the sharp devaluation of the peso in December 1994, and the economic crisis which followed. Production of animal food fell by 11.4 percent in 1995 according to statistics published by the balanced animal food section of *Cámara Nacional de la Industria de la Transformación (Canacintra)*, National Chamber of the Manufacturing

SUMMARY REPORT

This market information on Mexican animal feed 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:

InfoCentre

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

Internet: <http://www.dfait-maeci.gc.ca>

*FaxLink is a faxback system which provides summaries on a range of Mexican markets. It must be contacted through your fax machine. Dial from your fax phone and follow the voice prompt instructions.

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

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

© Minister of Supply and Services, January 1997

Cat. No. E73-9/56-1996-1E
ISBN 0-662-25198-9

Disponible en français.

SPONSORED BY

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



Industry. Imports of these products were even more sharply reduced. Participants in the Mexican feed industry see this as an opportunity to recapture some market share, by improving their productivity and quality. This is expected to create opportunities for joint ventures with Canadian feed producers.

Mexicans have not traditionally purchased prepared food for their pets. But pet food has recently emerged as a rapidly-growing market. Because there was no established Mexican pet food industry, American companies moved in to supply virtually all of market, both through subsidiary plants in Mexico and through imports. Mexican manufacturers will need foreign expertise to capture a larger share of this market.

THE ANIMAL FOOD INDUSTRY

The animal food industry consists of two primary subsectors: pet food and feed for livestock. The latter category consists mostly of feed for beef cattle, dairy cattle, hogs and poultry. Livestock feed consists primarily of cereals mixed with additives, including nutrients, minerals, vitamins, and roughage as well as a variety of reactive chemicals. Pet food is mostly canned meat and meat by-products, or dry food for cats and dogs.

LIVESTOCK FEED

A large proportion of Mexican livestock are fed on natural grasses and other vegetation, supplemented by whatever forage is available locally. This is especially true since the devaluation of the peso in December 1994, which has reduced the producers' ability to pay for imported feeds. But there is also a substantial market for balanced feed, which is specifically formulated for each species.

Poultry is the most important species consuming balanced animal feed; in

fact, poultry consume close to half the market. Beef cattle consume only about 10 percent of production. More than 70 percent of balanced feed production is distributed internally by integrated producers, while the rest is sold on commercial markets. Integrated producers include producer's unions, which buy cereals in addition to other foods and blend them for their member's use. In 1995, there were 78 production plants which were affiliated to the balanced animal food section of *Cámara Nacional de la Industria de la Transformación (Canacindra)*, National Chamber of the Manufacturing Industry. Their installed capacity of about 7.2 million tonnes is about 42 percent of estimated total capacity. Production by registered *Canacindra* members fell by 11.4 percent in 1995 to 3.9 million tonnes while total production was estimated at 14.4 million tonnes.

The largest absolute drop in 1995 production by registered producers

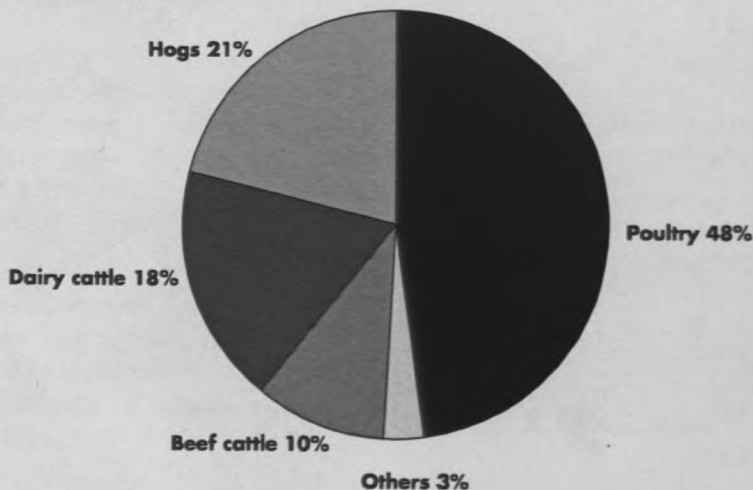
was seen in fattening preparations for poultry, which fell by 193,000 tonnes, and pig feed, which declined by 182,000 tonnes. This reflects a reduced market for meat of all kinds. The drop in feed for egg-producing hens was a relatively modest 7.6 percent, and production of feed for dairy cattle increased slightly during the year.

About 50 percent of the balanced animal feed produced in Mexico comes from the southern states. Yucatán alone accounts for 20 percent of production. Cereals and other crops used as raw materials are grown throughout Mexico.

PET FOOD

The Mexican market for pet food is growing rapidly and is dominated by imports. Dog and cat food are the largest market components, although there is a small market for ornamental fish food and birdseed. Excluding those categories, the market is estimated at about 70 percent dog food

ANIMAL FEED, 1995
Production by Species



Total: 14,410 thousand tonnes

Source: *Cámara Nacional de la Industria de la Transformación (Canacindra)*, National Chamber of the Manufacturing Industry.

and 30 percent cat food. Mexicans traditionally have not tended to purchase prepared food for their pets, so the domestic industry is small. One firm, *La Junta*, is believed to account for less than 10 percent of the market. The balance is served by imports or local production by American companies.

The most popular products are dry dog and cat food. High-nutrition brands such as Science Diet and Iams have been attracting attention recently, at least among the more affluent pet owners. The United States Department of Agriculture has forecast that the dog and cat food market will increase from 27,600 tonnes in 1993 to 74,000 tonnes in 2000. Imports in the latter year are forecast at 72,000 tonnes.

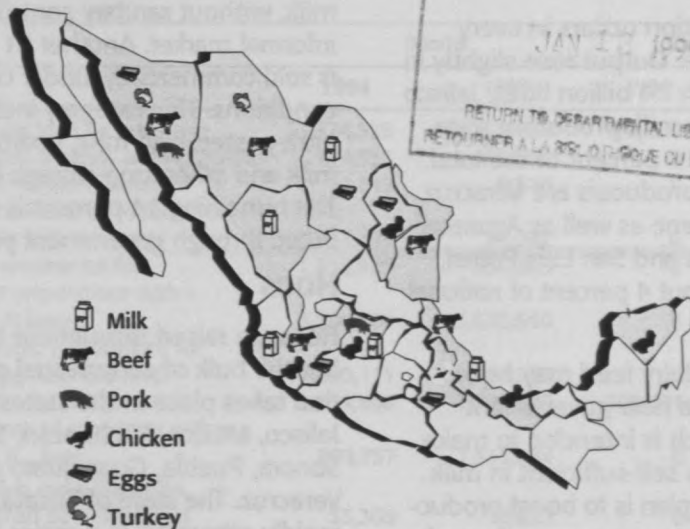
LIVESTOCK PRODUCTION

The use of balanced livestock feeds varies greatly by the species and the type of producer involved. Hogs and poultry require more balanced feed than cattle. The *Secretaría de Agricultura, Ganadería y Desarrollo Rural (Sagar)*, Secretariat of Agriculture, Livestock and Rural Development, distinguishes between three levels of technology in the livestock sector. Traditional family operations depend almost entirely on natural grasses. Supplemental food, if any, consists of farm waste.

Traditional farms make up the vast majority of livestock producing units. Semi-technical operations combine grazing on native vegetation with supplemental cereal-based feeds, but they do not use other modern practices such as scientific breeding. Technical producers use all or most of the modern techniques available, including irrigated pastures, balanced feeding, controlled calving, artificial insemination and range management. These operations are a very small proportion of total livestock

LIVESTOCK ACTIVITY

Principal productivity areas



Source: *Cámara Nacional de la Industria de la Transformación (Canacintra)*, National Chamber of the Manufacturing Industry, 1996.

units, but they dominate overall production, especially for exportable products.

BEEF CATTLE

Mexican cattle are raised primarily on native grasses. Natural rangelands are found throughout Mexico, and several states have programs to develop improved grass varieties. In some parts of the country, nearly continuous production of natural vegetation means that supplemental feeds are needed only during two or three months of the year. Nonetheless, a large proportion of Mexico's beef production is on arid or semi-arid land, and the nation exports large numbers of feeder cattle to the United States. Exports of feeder cattle rose from about 1 million head in 1994 to 1.6 million in 1995, as a result of the devaluation of the peso and the continuation of a prolonged drought.

The northern states of Chihuahua, Tamaulipas, Nuevo León, Durango, Sinaloa, Zacatecas, and Coahuila began to see a return to normal

rainfall in late 1996, following a five-year drought. Northern Mexico has a normally-dry climate, but precipitation was 40 percent lower than normal in 1995. Even though this area is the most heavily irrigated in Mexico, the severity and duration of the drought have had severe impacts on agriculture throughout the region. Many cattle died, and others were sold prematurely at low weight and at distress prices. According to US Department of Agriculture estimates, the 1996 opening beef cattle inventory stood at about 11.5 million head compared with 13 million at the beginning of 1994.

About one-quarter of all beef production comes from four states: Chihuahua, Durango, Sonora and Zacatecas. These states are export-oriented. The most popular breeds are Hereford, Angus and Charolais. Most ranchers in this region produce beef and ship steers to feedlots for finishing, often in the United States. The more technical producers have irrigated pastures and operate their

57575438

own feedlots. Feed is usually grain, crop wastes, cotton ginning and industrial by-products.

DAIRY CATTLE

Dairy production occurs in every Mexican state. Output rose slightly in 1995 to reach 7.4 billion litres. Jalisco is the leading milk-producing state, with almost 16 percent of the total. Other major producers are Veracruz, with 9.5 percent, as well as Aguascalientes, Puebla and San Luis Potosí, each with about 4 percent of national production.

Demand for dairy feed may be bolstered by a new government initiative which is intended to make Mexico nearly self-sufficient in milk by 2000. The plan is to boost production by 10 percent per year, through higher prices and the promotion of new technology. Mexico imports 10 million litres of milk per day, about 36 percent of domestic consumption.

According to US Department of Agriculture estimates, Mexico's 1996 year-opening inventory of dairy cows was about 2 million, unchanged from 1995, but down from 2.2 million at the beginning of 1994.

Technical Mexican milk producers tend to identify with modern — but not state-of-the-art — producers in New England, which tend to be about the same size. Holsteins are the most popular breed, and many technical operators produce their own forage, which is supplemented with commercially balanced feed.

Traditional dairy producers are mostly located in the tropical regions where natural grasses are available year-round. The most common breeds are Swiss-Zebu and Holstein-Zebu varieties. These operations generally lack facilities for proper cooling and handling. Recently, some producers have been forming cooperatives so as to install shared facilities, in associ-

ation with multinational dairy producers such as Nestlé.

About 35 percent of all of Mexico's milk is sold as *leche bronca*, course milk, without sanitary control in the informal market. Another 51 percent is sold commercially, under controlled conditions. This category includes ultra-pasteurized milk, powdered milk and other long-storage types. The remaining 14 percent is distributed through government programs.

HOGS

Hogs are raised throughout Mexico, but the bulk of commercial production takes place in the states of Jalisco, México, Michoacán, Sinaloa, Sonora, Puebla, Guanajuato and Veracruz. The state of Yucatán is rapidly emerging as a major hog producer, especially since the building of new production plants as part of the *Henequen* Farm project. Chiapas has a higher population of pigs than any state except Jalisco and Sonora, but most of the production is destined for immediate local consumption.

Pork production is heavily dependent on the availability and price of feed. Sorghum, soymeal and corn are the most popular feeds, although Mexican law reserves domestic corn for human consumption. According to media reports, the Mexican government has recently been restricting the issuance of corn-tariff quota permits in order to drive up the demand for domestic sorghum, which is in surplus, especially in Tamaulipas.

The pork industry has been hard hit by recent increases in the price of feeds, because of the devaluation of the peso and drought in the northern states. As a result, imported pork from the US and Canada has become more competitive. Since late 1993, wheat from Canada has been selling in Mexico at prices that are competitive with US sorghum and corn, and

some of it has been purchased for hog feed by producers' unions.

The size of Mexico's swine herd at the beginning of 1996 was estimated by the United States Department of Agriculture at 11.1 million head, compared with 12.5 million at the beginning of 1995. A small number of producers dominate the market. Highly technical producers account for about 40 percent of Mexican pork production, semi-technical operations produce 30 percent, and the rest comes from traditional family operations.

The technical producers maintain specialized sites and operate under strict controls. The most common breeds are Yorkshire, Duroc, Hampshire, Spotted and Landrace. Feeds are selected according to the six phases of the productive cycle. They are based on grains and oilseed meals and are generally produced locally by the breeders.

Semi-technical producers use commercially purchased balanced feeds. As a result, they are extremely sensitive to changes in the feed costs, which comprise about two-thirds of production costs. The feed is usually made from sorghum, corn and oilseed meals, mostly soya. Many semi-technical producers are beginning to import lower-cost animal feed from the United States.

Traditional production of pork is still very common in Mexico, accounting for about 30 percent of production and 40 percent of the national stock of pigs. These operations are especially prevalent along the coasts, in the tropical and sub-tropical areas, and among low-income families. Some producers use balanced feeds during the first few weeks after birth and just prior to slaughter. Sanitary problems are frequent and productivity is quite low.

POULTRY

Mexico's poultry industry is highly concentrated, with more than half of all poultry meat and eggs coming from five companies. Poultry meat production rose slightly in 1996 as the economic recovery began to take hold. Production is forecast to increase by about 7 percent in 1997, on the strength of higher consumer demand and a larger grain crop. According to industry observers, feed costs are almost 60 percent of total production costs. Canadian wheat is considered competitive with sorghum for poultry feed. About three-quarters of domestic production of poultry feed is for fattening, and the remainder for egg production.

FOREIGN TRADE

Mexico is an important importer of both balanced animal feed and the raw materials used in its manufacture. Imports of food preparations fell by almost 30 percent in 1995, to US \$79 million as a result of the peso devaluation. About 30 percent of the total was dog and cat food. Close to half of the total is identified in the Mexican customs data only as "other." Canada's import market share rose to 1.3 percent in 1995, on the strength of a large increase in the "other" category. Nonetheless, Canadian sales remained at less than US \$1 million.

The raw materials used by the balanced feed industry cannot be entirely separated from the same products used for human consumption. Using a list of typical balanced feed ingredients published by *Cámara Nacional de la Industria de la Transformación (Canacintra)*, National Chamber of the Manufacturing Industry, it is estimated that Mexican imports totalled almost US \$1.5 billion in 1995, down from about US \$1.7 billion the

MEXICAN IMPORTS OF ANIMAL FOOD PREPARATIONS

US dollars

	World		Canada	
	1994	1995	1994	1995
Dog and cat food for retail sale	33,324,528	23,379,784	22,024	60,769
Poultry feed of seeds and vegetables	434,535	194,053	0	137
Feed, with added minerals	14,012	8,516	0	0
Prepared sweetened fodder, beet pulp with molasses	38,478	35,092	0	0
Food for ornamental fish	1,339,925	588,923	0	367
Stimulant preparations with a vitamin H base	3,500,001	3,620,640	0	0
Concentrated preparations for producing balanced feed	11,890,111	9,466,287	0	0
Substitutes for milk for calves	3,434,808	1,824,689	209,724	188,594
Preparations of stimulants with a vitamin B ₁₂ base	899,757	1,331,284	0	0
Lactic solids more than 10%, but less than 50% by weight	53,309	13,823	0	0
Lactic solids more than 50% by weight	920,178	933,182	0	0
Others	54,612,504	36,548,864	112,519	724,565
Total	110,462,146	77,945,137	344,267	974,432

Source: *Instituto Nacional de Estadística, Geografía e Informática (INEGI)*, National Institute for Statistics, Geography and Informatics.

year before. Canada's share of this market was only US \$1.3 million, almost all of which was oats. This compilation does not include wheat, which has recently seen increased use in animal feed products produced in Mexico.

CUSTOMERS

Mexico's agricultural sector has two major components. Small, labour-intensive farms cater to the domestic market. About 90 percent of farmers have less than five hectares of land. These farms coexist with a much smaller number of large-scale, highly mechanized and technologically-advanced operations. They are often linked to multinational corporations either by direct investment, or indirectly through purchasing and financing agreements.

In addition to large integrated producers, producer associations which link small *ejidos*, communal farms, on a regional basis are also potential customers for Canadian animal feed products. Some of these organizations buy raw materials and mix their own balanced feeds, but they also buy commercial preparations. Some of them buy directly from foreign suppliers. The growth of such cooperatives is expected over the next few years because of changes to the Mexican constitution which now allow the assembly of *ejidos* into integrated joint ventures.

About 70 percent of Mexican pet food sales are sold by large supermarkets, and the rest in smaller grocery stores. These stores buy primarily from Mexican distributors, although a few large supermarket chains are affiliated with American wholesalers.

COMPETITORS

The balanced animal feed section of *Cámara Nacional de la Industria de la Transformación (Canacintra)*, National Chamber of the Manufacturing Industry, had 78 members in 1995. Multinational firms include Ralston Purina and Anderson Clayton, each of which has operations throughout the country. Major multinationals that are not members include BASF and *Química Hoescht*. The former has just expanded production at one of its two Morelos feed plants, using new technology that will reportedly triple production with the same labour force.

La Hacienda is a Mexican company with operations in several states. Other *Canacintra* members in this category are located in 21 states. There are more than 200 manufacturers of balanced feeds in Mexico that are not members of *Canacintra*. Many of them are cooperatives formed by local livestock producers.

Some large livestock operators operate their own integrated feed production facilities. For example, Pilgrim's Pride recently acquired the assets of the *Unión de Avicultores de Querétaro*, Association of Aviculturists of Querétaro, and is the second-largest chicken producer in the country.

Some of the feed producers in northern Mexico are operating below the break-even point and a few are reportedly on the verge of closing. Production is being maintained in the south, which was not affected by the prolonged drought that plagued the northern states until late 1996.

TRENDS AND OPPORTUNITIES

The agricultural sector was severely harmed by the peso devaluation of December 1994. By mid-January

1995, the peso stood at roughly half of its former value relative to the US dollar. Imports were cut drastically and Mexico registered its first agricultural trade surplus since 1987. But the agriculture sector was not able to increase production sufficiently to take advantage of the export boom caused by the cheaper peso. Agricultural gross domestic product (GDP) fell by 15 percent during 1995, compared with 10 percent for the overall economy. The economy began to recover in the last quarter of 1995, and Mexico is expected to register a small deficit in agricultural trade in 1996.

RATIONALIZATION AND MODERNIZATION

Prior to the devaluation, the larger livestock producers and feed manufacturers had been rationalizing their operations. They recognized the need to modernize to improve productivity and quality, to compete in the newly liberalized trade environment. Now that the economy is in a state of gradual recovery, modernization is once again a major priority. Many observers believe that this will create opportunities for joint ventures with foreign companies. This is especially true since the crisis has left most of them very short of capital.

Two major agricultural reforms, which are part of the government's broad liberalization package, are further driving the trend towards modernization. They are reform of the land tenure system and removal of agricultural price supports.

LAND TENURE

Land reform was a primary goal of the Mexican Revolution which began in 1910. Large estates were broken up and redistributed to the people in the form of communal holdings known as *ejidos*. The *ejido* system gave peasant farmers a plot of land that was communally owned but individually maintained. Plots were

handed down to the next generation, but could not be sold or rented. *Ejido* plots were intended to be large enough to provide enough food for family consumption and limited exchange for subsistence goods. But they were never expected to be significant commercial operations. As a result, the average farm in Mexico is only about 5 hectares.

Article 27 of the Mexican Constitution was amended in 1992 to implement a four-point agrarian reform. No further communal land distribution will be done. *Ejidros* can form *agroasociaciones*, joint ventures, with each other and with outside investors. A system of agrarian law courts was established, and *ejidatarios* can now obtain clear title to their property.

This change has been slow to take effect, but a recent government program, *Fondo de Capitalización e Inversión del Sector Rural (Focir)*, Rural Capitalization and Investment Fund, is now supporting *agroasociaciones* with loans, loan guarantees, technical support and help with export promotion. This is expected to lead to increased vertical integration, possibly including new feed facilities run by communal farms.

PRICE SUPPORTS

A second major reform was implemented in October 1995, when the Zedillo administration announced the *Alianza para el Campo*, Rural Alliance. This new initiative builds upon a previous program known as *Programa de Apoyos Directos al Campo (Procampo)*, which was announced by the Salinas administration in October, 1993. That program was the centrepiece of the government's effort to introduce market forces into the sector, and to rationalize crop production. Traditionally, farmers have specialized in the most heavily subsidized crops, notably corn and beans.

The program initially included nine basic crops: corn, sorghum, wheat, soybeans, cotton, rice, barley, safflower and dry beans. Farmers with land planted in these crops were entitled to \$440 Mexican pesos per hectare for the 1995 to 1996 season. The plan applies only to land that was included in a special agricultural census conducted in 1993. Once they qualified for *Procampo*, the eligible area was fixed, and farmers were free to grow other crops on the subsidized land, in response to market forces. The 1995 changes included the expansion of the program to include livestock producers.

Procampo was explicitly designed to comply with the requirement of Article 704 of the North American Free Trade Agreement (NAFTA), which stipulates that member countries move towards agricultural support measures with "minimal or no trade distorting or production effects." Given the gradual removal of import duties on agricultural products under NAFTA, it would have been impossible for Mexico to maintain prices that exceeded international levels. Domestic corn, for example, sold for three times the international level in 1993.

REGULATORY ENVIRONMENT

Many agricultural products imported into Mexico are subject to a series of health regulations administered by the *Secretaría de Salud (SS)*, Secretariat of Health. Animal foods are not generally subject to these regulations at time of importation, although they are subject to general health regulations. The chief executive officer of *Purina de México* was jailed briefly in March 1996 before being released on bail on charges that the company sold contaminated chicken feed to farmers in Chiapas.

Prepared animal food formulations must be registered with *Secretaría*

de Agricultura, Ganadería y Desarrollo Rural (Sagar), the Secretariat of Agriculture, Livestock and Rural Development. The regulations are subject to sudden changes. In June 1994, for example, the Mexican government suddenly imposed regulations requiring that shipments of cattle feed from the US had to be certified as free from sheep derivatives. Exporters should arrange for their agent or importer to verify the specific regulations that might apply to a particular product prior to export.

All products destined for retail sale, such as pet food, must be labelled in accordance with government regulations. A new set of rules was set out in the *Diario Oficial*, National Gazette, on 26 December 1995. These regulations have been in a state of constant revision since 1994, and exporters should verify the requirements with the importer prior to shipment. Spanish-language labels must be affixed to the product before they can enter Mexico.

MARKET ENTRY STRATEGIES

Most animal foods are sold in Mexico through distributors or agents. Some Canadian firms in other sectors have found that joint ventures with potential competitors can also be an effective entry strategy. Some of them have gaps in their product lines, and others are seeking technical assistance.

Potential distributors or partners can be identified by participation at agricultural trade shows or through contact with Mexican industry associations. For example, the balanced animal feed section of *Cámara Nacional de la Industria de la Transformación (Canacintra)*, National Chamber of the Manufacturing Industry, publishes a directory of its members. The associations representing beef, dairy, hog and poultry producers are familiar with distri-

butors operating in those subsectors. The Canadian Embassy in Mexico City can also help with market intelligence and introductions, as can the consulates in Guadalajara and Monterrey.

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

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

Fax: (613) 996-9709

FaxLink:* (613) 944-4500

InfoCentre Bulletin Board (IBB):

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

Internet: <http://www.dfait-maeci.gc.ca>

*FaxLink is a faxback system which provides summaries on a range of Mexican markets. It must be contacted through your fax machine. Dial from your fax phone and follow the voice prompt instructions.

The Trade and Economic 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.



Trade and Economic Division
The Embassy of Canada in Mexico
Schiller No. 529
Col. Polanco
11560 México, D.F.
México
Tel.: (52-5) 724-7900
Fax: (52-5) 724-7982

Canadian Consulate
Edificio Kalos, Piso C-1
Local 108-A
Zaragoza y Constitución
64000 Monterrey, Nuevo León
México
Tel.: (52-8) 344-3200
Fax: (52-8) 344-3048

Canadian Consulate
Hotel Fiesta Americana
Local 30-A
Aurelio Aceves No. 225
Col. Vallarta Poniente
44110 Guadalajara, Jalisco
México
Tel.: (52-3) 616-6215
Fax: (52-3) 615-8665

International Trade Centres have been established across the country as a convenient point of contact to support the exporting efforts of Canadian firms. 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 24,000 Canadian exporters.

For general information, call (613) 944-4WIN (4946); to register on WIN Exports, call (613) 996-2057, or fax 1-800-667-3802 or (613) 944-1078.

Program for Export Market Development (PEMD)

PEMD is DFAIT's primary export promotion program. It supports a variety of activities to help Canadian companies expand into export markets. PEMD shares up to 50 percent of eligible expenses. Program financial assistance is a repayable contribution, not a grant, and must be approved in advance. For general information, call the InfoCentre at 1-800-267-8376. For applications for assistance through this program, call the International Trade Centre nearest you. In Quebec, PEMD is administered by the 13 regional offices of the Federal Office of Regional Development (FORD Q).

Agriculture and Agri-food Canada

International Market Services Division

Agriculture and Agri-Food Canada
930 Carling Avenue
Ottawa, ON K1A 0C5
Tel.: (613) 759-7753
Fax: (613) 759-7506

Canadian International Development Agency (CIDA)

CIDA is an important possible source of financing for Canadian ventures in Mexico. A special fund is available through CIDA under the Industrial Cooperation Program (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, or fax (819) 953-5024.

Export Development Corporation (EDC)

EDC helps Canadian exporters compete in world markets by providing a wide range of financial and risk management services, including export credit insurance, financing to foreign buyers of Canadian goods and services, and guarantees.

EDC has established relationships with leading commercial and public sector institutions in Mexico and Latin America. For information on the full range of EDC services, call (613) 598-2500, or fax (613) 598-6858.

Revenue Canada

Revenue Canada, Trade Administration Branch provides service in English, French and Spanish. Revenue Canada publications and customs notices are also available by calling or faxing the NAFTA Information Desk: 1-800-661-6121 or (613) 941-0965; fax: (613) 952-0022.

Business and Professional Associations

Canadian Feed Industry Association

325 Dalhousie Street
Ottawa, ON K1N 7G2
Tel.: (613) 241-6421
Fax: (613) 241-7970

Canadian Dehydrators Association

#4, 10008 29 A Avenue
Edmonton, AB T6N 1A8
Tel.: (403) 450-0169
Fax: (403) 450-0604

Canadian Hay Association

206-1235 17th Avenue SW
Calgary, AB T2T 0C2
Tel.: (403) 541-0911
Fax: (403) 541-0915

Canadian Council for the Americas Executive Offices

360 Bay Street
Suite 300
Toronto, ON M5H 2V6
Tel.: (416) 367-4313
Fax: (416) 367-5460

Alliance of Manufacturers and Exporters Canada

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

Alliance of Manufacturers and Exporters Canada

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

The Canadian Chamber of Commerce

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

Forum for International Trade and Training Inc.

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

Language Information Centre

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

Open Bidding Service

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

Canadian Standards Association

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

Standards Council of Canada

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

Mexican Embassy in Canada

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

MEXICO

Government Departments

Secretariat of Agriculture, Livestock, and Rural Development, Animal Health Directorate

Secretaría de Agricultura, Ganadería y Desarrollo Rural (Sagar)
Dirección General de Salud Animal
Av. Recreo No. 14, Piso 11
Col. Actipán
03230 México, D.F.
México
Tel.: (52-5) 534-4966/1580
Fax: (52-5) 534-8724

Secretariat of Health, Statistics and Informatics Division

Secretaría de Salud (SS)
Dirección General de Estadística e Informática
Leibnitz No. 20, Piso 3
Col. Anzures
11590 México, D.F.
México
Tel.: (52-5) 250-0925, 254-8034
Fax: (52-5) 250-0984

Rural Capitalization and Investment Fund

Fondo de Capitalización e Inversión del Sector Rural (Focir)
Dirección Adjunta de Promoción de Negocios
Av. Alfonso Reyes No. 115
Col. Condesa
06140 México, D.F.
México
Tel.: (52-5) 272-1881/1641,
515-6431/6451
Fax: (52-5) 272-1689

National Institute of Forestry, Agriculture and Livestock Research

Instituto Nacional de Investigaciones Forestales Agrícolas y Pecuarias (INIFAP)
Av. Serapio Randón No. 83
Col. San Rafael
06470 México, D.F.
México
Tel.: (52-5) 546-4027, 566-3638
Fax: (52-5) 566-3799

National Grain Distributing Company

Compañía Nacional de Subsistencias Populares (Conasupo)
Insurgentes Sur No. 489, Piso 4
Col. Hipódromo Condesa
06100 México, D.F.
México
Tel.: (52-5) 584-1922, 722-7333
Fax: (52-5) 722-7312

National Institute for Statistics, Geography and Informatics

Instituto Nacional de Estadística, Geografía e Informática (INEGI)
Dirección de Políticas y Normas en Informática
Patriotismo No. 711 - A, Piso 10
Col. San Juan Mixcoac
03730 México, D.F.
México
Tel.: (52-5) 598-7617/7490
Fax: (52-5) 598-7738

Secretariat of Commerce and Industrial Development

Secretaría de Comercio y Fomento Industrial (Secofi)
Insurgentes Sur No. 194
Col. Florida
01030 México, D.F.
México
Tel.: (52-5) 229-6560/6562/6100
Fax: (52-5) 229-6568

Mexican Business and Professional Organizations

National Chamber of Manufacturing Industries, Animal Feed Products Division
Cámara Nacional de la Industria de la Transformación (Canacintra)
Sección de Fabricantes de Alimentos Balanceados para Animales
Av. Watteu No. 70, Piso 2
Col. Nonoalco, Mixcóac
Delegación Benito Juárez
03910 México, D.F.
México
Tel.: (52-5) 563-4600
Fax: (52-5) 563-4881

National Cattle Ranchers Association
Confederación Nacional Ganadera (CNG)
Av. Mariano Escobedo No. 714
Col. Anzures
Delegación Miguel Hidalgo
11590 México, D.F.
México
Tel.: (52-5) 254-3210/3245/3218/
1953/2574
Fax: (52-5) 254-1953/2574

National Poultry Producers Association
Unión Nacional de Avicultores (UNA)
Av. Medellín No. 325
Col Roma Sur, Delegación Cuauhtémoc
06760 México, D.F.
México
Tel.: (52-5) 264-1460,
564-9322/0387
Fax: (52-5) 584-2594

Association of Aviculturists of Querétaro
Unión de Avicultores de Querétaro
Calle Nogal No. 13, Esq. Huijote
Fraccionamiento Arboledas
76140 Querétaro, Querétaro
México
Tel.: (52-42) 12-3707
Fax: (52-42) 12-9820

Selected Mexican Companies
Purina, S.A. de C.V.
Paseo de la Reforma No. 295
Piso 14
Col. Cuauhtémoc
06500 México, D.F.
México
Tel.: (52-5) 208-2233/0729,
628-5500
Fax: (52-5) 533-1655, 208-0729

Productora de Alimentos Pecuarios de Nuevo León (PAPSA)
Av. Juárez Arista, S/N
65500 Salinas Victoria, Nuevo León
México
Tel.: and Fax: (52-8) 237-0427/
4028/4029/0430

Anderson Clayton & Co., S.A. de C.V.
Jaime Balmes No. 11, Torre C, Piso 6
Col. Polanco
11510 México, D.F.
México
Tel.: (52-5) 326-0300/0301
Fax: (52-5) 395-0224

BASF Mexicana, S.A. de C.V.
Insurgentes Sur No. 975
Col. Ciudad de los Deportes
03710 México, D.F.
México
Tel.: (52-5) 325-2613/2512
Fax: (52-5) 611-4597

La Hacienda, S.A. de C.V.
Av. Lauro Villar No. 68
Col. Providencia, Delegación Azcapotzalco
02440 México, D.F.
México
Tel.: (52-5) 382-0446/3012
Fax: (52-5) 382-3004

DOCS
CA1 EA612 97A52 ENG
Animal feed products. --
54575438