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INTRODUCTION

Mexico with its large population and liberalized import policy has become an attractive market for US exporters of food and agricultural products. A present population of 93 million should reach 100 million by the year 2000. Despite a major currency devaluation in late 1994, Mexico's import market is recovering. Indeed, Mexico must import many goods in order to fuel its economy and feed its people.

Mexico is a developing nation with a significant and growing share of households -- approximately 22% or 20 million persons -- have the purchasing power and predilection to buy imported consumer-ready products.

Mexico has become one of the most dynamic markets for US food and agricultural exports. US exports to Mexico fell over 30% in 1995, however, the North American Free Trade Agreement (NAFTA) should help exports recover and grow further. A case in point is the expansion of tariff free quotas. Although the devaluation will intensify competition with domestic producers, the import demand for many products is expected to remain strong in the long term.

Growing imports from the United States are being driven by the increasing openness of the Mexican market, a rapidly growing population, an improving affluence and changing taste of its consumers, and the modernization of the food distribution network. The supermarket sector is expanding and most of Mexico's major chains have entered into alliances with US retailing giants. Moreover, discount warehouse outlets are making supermarket shopping accessible to an even wider segment of consumers. The impact of fast-food restaurants, although hampered by the devaluation, is considerable.

Companies interested in receiving additional information are invited to contact:

* the US Agricultural Trade Office (ATO) (525) 202-0168
* the Washington State Apple Commission (509) 663-9600
* the Western US Agricultural Trade Association (360) 574-2627
* the California Tree Fruit Agreement (916) 483-9261
* the Oregon-Washington-California Pear Bureau (503) 223-8139
* the International Apple Institute (703) 442-8850

New entrants to the Mexican market should consider the ATO publications " Selling US Food and Agricultural Products in Mexico: An Exporter's Guide for US Companies" and "Building a Food Products Distribution System in Mexico."

EXECUTIVE SUMMARY

The United States exported to Mexico in 1996:

$48 million worth of apples or 88,401 MT
$20 million worth of pears or 37,240 MT

Apples: Mexican consumption in 1995 totaled 517,000 MT and has been increasing

at 4% per year.

Apples are one of the largest domestically grown crops in Mexico.
Imports now account for 17% of consumption and are increasing.
Mexico is becoming increasingly open to US apple producers.

Pears: Consumption totals 42,000 MT in 1995 and has been growing at an average of 10% per year.

Both imports and production have been increasing.
Mexicans are eager consumers of pear when supply is ample.
Imports account for 76% of consumption, despite the devaluation.

For 1997, the Mexican market is protected by a 12% tariff and safeguard agreement on apples and a 3% duty on pears; however, under NAFTA, pears will enter freely by 1998 and apples by 2003.

Both apples and pears appear to offer significant opportunities for US exporters.

DEMOGRAPHICS

Mexico's rising demographics coupled with irregular economic growth have led to polarized styles and quality of life among its 93 million citizens. Growing at an average rate of 2.12% per year, Mexico will have more than 100 million people by the year 2000. Such dynamics have led Mexico to have 76.64% of its population in urban settings, and 45% of its population under 20.

AGE SPREAD

Age Bracket	# of People Million	% of Total
0 - 4	11.54	12.32
5 - 9	10.33	11.02
10 - 14	10.86	11.58
15 - 19	10.49	11.19
20 - 24	10.20	10.88
25 - 29	8.03	8.57
30 - 34	6.56	7.00
35 - 39	5.52	5.90

40 - 44	4.7	5.02
45 - 49	3.7	3.95
50 -54	2.95	3.15
55 - 59	2.38	2.54
60 - 64	2.17	2.32
65 +	4.28	4.57

Source: General Population Census 1980, 1990 and SIGMA Consultores S.A.

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DEMOGRAPHICS

A full 66% of the population (61 million) live in 125 cities. These cities hold 98% of the upper class, 94% of the middle class, and represent 96% of the nation's purchasing power. The upper and middle classes, an estimated 20 million, can afford to purchase luxury items and are the largest consumers of imported goods, while the remaining 80% (73 million) are concerned with basic necessities or are living in extreme poverty by US standards.

STANDARD HOUSEHOLD INCOME

Class Level	Sub-Level	Population	% Of Total	Annual Household Income
UPPER	HIGH UPPER	360,790	0.38	US$435,000+
CLASS	LOW UPPER	1,538,541	1.64	US$96,800+
MIDDLE	HIGH MIDDLE	2,923,485	3.12	US$29,040+
CLASS	MID-MIDDLE	5,882,809	6.28	US$14,520+
	LOW MIDDLE	8,477,697	9.05	US$9,680+
WORKING	HIGH WORKING	11,848,611	12.64	US$4,840+
CLASS	MID-WORKING	15,006,564	16.01	US$2,904+
	LOW-WORKING	19,910,201	21.24	US$968+
UNDER CLASS		27,775,870	29.64	US$968 or less

Source: SIGMA Consultores, "Mercados Potenciales '96"

Expenditure on food and beverages varies considerably by socioeconomic group. Food purchases as a percentage of total expenditure are high for the poorer classes whose diet consists primarily of basic foodstuffs like corn tortillas, beans, and rice. Imported food products which are likely to be consumed by the lower classes are few and include bulk commodities such as non-fat dehydrated milk and beans.

Food purchases as a percentage of total expenditure for the wealthier classes are much lower. Those in the wealthier classes can afford to buy a wide variety of imported products, including high value consumer ready products (e.g., frozen french fries, prime cuts of meat, and frozen prepared meals).

% of Families that Prefer Imported Products

	High Class	Middle Class	Working Class	Underclass	Average

Fresh Produce	15%	10%	35%	27%	25%
Canned Produce	17%	7%	18%	9%	13%
FrozenProduce	19%	7%	10%	5%	9%

Purchasing power is even more concentrated in Mexico's top 20 cities which hold 44% of the total population and 47% of the nation's purchasing power.

TOP 20 CITIES IN MEXICO AND THEIR SOCIAL ECONOMIC STATUS

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City	Population Million	Upper Class Million	Middle Class Million	% Of City Population made up of upper & mid classes	% of nation's upper & mid Classes
1. Mexico City	18.73	0.743	5.57	29.78	23.93
2. Guadalajara	3.66	0.164	1.07	29.35	4.69
3. Monterrey	3.32	0.183	0.95	28.73	4.30
4. Toluca	1.75	0.052	0.43	24.64	1.83
5. Puebla	1.49	0.056	0.411	27.69	1.77
6. Leon	1.28	0.040	0.307	24.03	1.31
7. Torreon	1.07	0.017	0.249	23.29	1.01
8. Tijuana	0.98	0.018	0.174	17.67	0.73
9. Juarez	0.98	0.018	0.161	16.39	0.68
10.San Luis Potosi	0.82	0.004	0.182	22.20	0.71
11. Merida	0.82	0.014	0.242	29.54	0.97
12. Morelia	0.78	0.027	0.219	28.13	0.93
13. Acapulco	0.74	0.023	0.13	17.53	0.58
14. Tampico	0.74	0.011	0.16	21.72	0.65
15. Queretaro	0.72	0.013	0.187	26.16	0.76
16. Mexicali	0.66	0.012	0.102	15.44	0.43
17. Culiacan	0.63	0.012	0.134	21.33	0.55
18. Chihuahua	0.63	0.018	0.153	24.54	0.65
19. Aguas-calientes	0.62	0.018	0.175	28.09	0.73
20. Veracruz	0.58	0.012	0.135	23.19	0.56
TOTAL	41	1.455	11.142	--	47.75

Source: INEGI

Mexico City accounts for 21% of the total population, or roughly 20 million people, in its extended metropolitan area. The next two major cities are Guadalajara and Monterrey, each with more than 3 million persons. The cities along the US border such as Juarez, Tijuana, and Mexicali, are among the most rapidly growing in the country.

THE MEXICAN MARKET FOR APPLES AND PEARS

US Exports to Mexico

US exports to Mexico of both apples and pears have been increasing rapidly. In 1994 a new agreement significantly opened up additional portions of the United States that could ship apples to Mexico, thus vastly increasing the export potential.

US exports of apples totaled $49 million or 81,156 MT in 1995, down 47% from the prior year. American pear shipments fell 55% to 31,459 MT worth $16 million.

The Mexican Market for Apples

The Mexican market for apples is summarized below.

THE MEXICAN MARKET FOR APPLES (000MT)

	1990	1993	1994	1995	2000e
Production	457	598	487	503	601
Imports	5	122	154	86	102
Exports	NA	58	109	72	83
Consumption	462	662	532	517	620
Imports as % of Consumption	1.0	18.0	29.0	17.0	16.5
Per Capita Consumption Kg.	5.5	7.3	5.8	5.6	6.0

* In the absence of current figures, 1993 production is estimated to be the same as 1992.
Source: SAGAR, SECOFI, Bancomext

Consumption

Current per capita consumption of fresh apples is approximately 6 kg. Nearly 60% of this consumption is destined for domestic fresh consumption while the remaining 40% are channeled to the processing industry. The processing industry is estimated to consume 40% of production.

Per capita consumption is expected to rise 12% by the year 2000, reaching 6.3 kg. Imports are a growing percent of consumption. This trend has been attributed to aggressive marketing efforts of US apple growers, particularly from Washington State. Mexican consumers have been quick to accept Red Delicious, Rome Beauty and Granny Smith varieties. The Chihuahua Golden is popular as a lunch-box apple.

Of the aproximately 40% of apples consumed by the processing industry the breakdown is as follows:
* Liquor 48%
* Fruit Juice and Concentrate 28%
* Yogurt 17%
* Dried Fruit 5%
* Ice Cream and Popsicles 2%

Source: INEGI

Production

Although apples represent the largest tree fruit crop in Mexico, production has been growing modestly at 2%, barely keeping up with population growth.

Most of Mexico's apple orchards are irrigated and produce apples of good enough quality to satisfy the tastes of the Mexican market. Indeed, Mexican consumers are not as picky as US consumers in terms of the cosmetic appearance of the fruit as long as it tastes good. Unlike in the United States, nearly 50% of the apples Mexican consumers purchase are used to make shakes (licuados), sauce, and condiment dishes rather than eaten whole and fresh. Therefore a waxed appearance, uniformity of color, and shapeliness are not as important. Industrial clients, chiefly juice manufacturers are even less picky.

MEXICAN APPLE PRODUCTION 1994

	Ha Planted	Ha Cultivated	Production in Tons	Average Yield Ton/Ha	Average Price p/Ton	Production Value
Irrigated	44,259	38,346	368,114	9.6	US$3,050	US$121296024
Perennial	25,022	23,126	119,584	5.17	US$475	US$ 56186811
Total	69,281	61,472	487,698	Avg.7.39	--	US$177482835

Source: SAGAR

The Mexican Market for Apples

The peak harvest season occurs from July through September and overlaps with the Washington State harvest. A calendar of production by variety is shown here.

MEXICAN APPLE PRODUCTION CALENDAR

State	J	F	M	A	M	J	J	A	S	O	N	D

Golden Delicious	X	X	X
Red Delicious	X	X	X
Starking	X	X	X
Rome Beauty		X	X

Imports

Mexican imports of apples have increased substantially in recent years from virtually nothing in 1989 to 154,000 MT in 1994 or nearly 30% of consumption.

The peso devaluation curtailed imports during 1995, but even so imports accounted for nearly 18% of consumption.

The United States has historically been the primary supplier and has increased market share to 99% of imports in 1995.

MEXICAN APPLE IMPORTS (000 MT/Million US$/Market Share)

	USA			CHILE			OTHER*			Total
	000MT	$Mill	%	000MT	$Mill	%	000MT	$Mill	%	000 MT
1989	0.3	--	75.0	0.0	--	0.0	0.1	--	25.0	0.4
1990	4.5	--	100.0	0.0	--	0.0	0.0	--	0.0	4.5
1991	18.8	--	100.0	0.0	--	0.0	0.0	--	0.0	18.8
1992	90.6	--	96.0	3.8	--	3.0	0.3	--	1.0	94.7
1993	115.0	62.2	94.0	3.7	3.7	3.0	4.0*	3.9	3.0	122.3
1994	149.0	94.0	96.6	2.4	1.4	1.5	3.0	2.0	2.0	154.4
1995	81.0	49.4	100.0	0.0	0.0		0.7	0.5	0.0	81.7
2000e	97.0			4.0			1.0			102.0

New Zealand and Canada
Source: SECOFI, Bancomext.

Increased Mexican apple imports have been due to three primary factors:

1) A loosening of import restrictions and the clearance of specified US growing areas for shipment.

2) The superior quality of imported product.

3) Extensive and successful promotional campaigns undertaken by US commodity organizations.

The Mexican Market for Pears

Pears are popular in Mexico and are being consumed at an increasing rate. The varieties which handle well -- both domestic and imported -- appear to have the most widespread popularity. The Mexican market for pears is shown below.

THE MEXICAN MARKET FOR PEARS (000 MT)

	1990	1992	1993	1994	1995	2000e
Production	18	38	43	47	50	65
Imports	34	39	43	74	32	47
Exports	NA	NA	0	1	40	40
Consumption	52	77	86	120	42	72
Imports as % of Consumption	65	51	50	62	76	65
Per Capita Consumption Kg.	0.60	0.90	0.95	1.30	0.45	0.70

Source: SECOFI, Bancomext

Consumption

Per capita consumption of pears is small--less than 1 kilo. Consumption is based largely on the availability of production and imports. In 1993 and 1994, when insignificant Mexican exports placed larger than usual amounts of pear on the market, the consumer responded by consuming up to 1.3 kg. per capita. In 1995, when a devalued peso favored large exports, few of the national production remained in Mexico and per capita consumption fell to a staggering

The most popular varieties are:
* Bartlett
* Keiffer
* D'anjou

Estimates place the amount of fresh pears destined for the processing industry at less than 10%. Pear juice is ranked eighth in preference by the Mexican consumer. Ranking of tastes is as follows:

1. Orange
2. Apple
3. Mango
4. Grape/Pineapple
5. Tamarind
6. Peach
7. Guava Fruit
8. Pear/Grapefruit

Sun-dried pears, and other dried fruits are popular as Christmas season snacks. Industry observers estimate that close to 10% of domestic pear production is destined to this use.

Production

Mexico produces a variety of pear that is not equal to the higher quality US pears. With domestic production stable, imports will remain a significant source for the fresh pear market into the next century.

Production occurs mainly in the northern state of Chihuahua and the peak harvest season is from July through August.

MEXICAN PEAR PRODUCTION 1994

	Ha Planted	Ha Cultivated	Production in Tons	Average Yield Ton/Ha	Average Price p/Ton	Production Value
Irrigated	761	686	5,073	7.40	US$573	US$2,906,829
Perennial	4,635	4,584	28,035	6.12	US$450	US$12,615,750
Total	5,396	5,720	33,108	Avg.6.76	--	US$15,225,579

Source: SAGAR

Imports and Foreign Competition

Imports prior to the devaluation were growing at close to 10% per year and grew spectacularly in 1994 growing at 70% over 1993. With the devaluation imports fell to 32,000 MT. By the year 2000 imports are expected to rebound to 47,000 MT, growing once again at an average of 10% per year.

By the year 2000 imports are expected to represent more than 70% of consumption. This result is to come from an increasing amount of Mexican production is exported rather than sold domestically. The US dominates pear imports as can be appreciated in the chart below.

Mexican pear imports

	USA			CHILE			OTHER*			Total
	000MT	$	%	000MT	$	%	000MT	$	%	000 MT
1989	28.7	--	75	0.0	--	0.0	0.10	--	0	28.2
1990	33.7	--	100	0.0	--	0.0	0.50	--	2.0	34.2
1991	35.0	--	100	0.0	--	0.0	0.20	--	1.0	35.2
1992	36.6	--	96	0.4	--	1.0	2.00	--	5.0	39.0
1993	41.5	23.5	98	1.4	0.8	1.5	0.20	0.08	0.5	43.1

1994	72.8	35.8	98	1.4	1.4	2.0	0.00	0.00	0.0	74.4
1995	31.5	16.7	100	0.5	0.4	0.0	0.03	0.02	0.0	32.0

New Zealand and Canada
Source: SECOFI, Bancomext

MARKET CONSTRAINTS

US apple and pear exports to Mexico face several market constraints which will gradually disappear under NAFTA. However, phytosanitary restrictions for

apples may continue to limit US potential.

Tariffs and Import Permits

US apple and pear exports to Mexico are limited currently by tariffs.

Under the NAFTA agreement there is no limit on the volume of apples that can be imported from the USA in any year.

However, increasing safeguard limits were established for apples, above which Mexican importers must pay a 20% tariff until the year 2003. This is shown in the table below.

MEXICAN TARIFFS AND SAFEGUARDS ON APPLES AND PEARS

	1996		1999		2003	
Product	Safeguard Volume (000 MT)	% Tariff (over safeguard volume)	Safeguard Volume (000 MT)	% Tariff (over safeguard volume)	Safeguard Volume (000 MT)	% Tariff (over safeguard volume)
Apples	60	20	65	20	none	0
Pears	none	0	none	0	none	0

Source: USDA

Tariffs became 12% for apples and 3% for pears in 1997. The tariff on pears is to decline in equal increments over 5 years and will be eliminated by 1998. The tariff on apples is declining at a straight line rate for 10 years, going to zero in 2003.

Health and Phytosanitary Requirements

Mexican phytosanitary policies have resulted in keeping many US apples out of the Mexican market. Until September of 1994, only certain counties in the states of Washington and Oregon had been cleared to supply apples to Mexico. Now other counties in California, Idaho, Colorado, Michigan, New York, Pennsylvania, Virginia, and West Virginia are cleared to export to Mexico as well. In all cases certain limitations still exist, however.

* Only US growing areas and packing facilities which have been inspected and cleared by Mexican phytosanitary officials can ship apples.

* Apples destined to Mexico must receive cold treatment at 3.3 degrees centigrade for a period of 60 days or at 0 degrees centigrade for a period of 45 days. The temperature must be monitored by a graphic temperature recorder and the time and temperature must be recorded on the phyto-sanitary

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certificate.

By comparison, the phytosanitary restrictions for US pear shipments to Mexico are not as problematic. The USDA Animal & Plant Health Inspection Service (APHIS) must make sure that the fruit moth, apple maggot and plum curculio are not present before issuing the required USDA phytosanitary export certificate. Shipments must be substantially free of leaves and debris. And there is a limit of two pear leaves in each box shipped.

To find out how to get operations approved to export to Mexico, contact your nearest APHIS representative.

DISTRIBUTION CHANNELS

Mexico's distribution system is unique in its mix between traditional distribution methods (central market purchasing and delivery) and more sophisticated methods (large regional and national distributors).

Importers and Distributors

Distributors/importers are key to the success of any imported product since only some of the major retail and few of the major food service chains import directly. Retail buyers cite inadequate distribution -- the inability to provide supply continuity and on-time delivery -- as the major obstacle why new-to-the-market US products fail to succeed in their stores.

For any US company entering Mexico, it is important to have someone -- an agent or reliable distributor -- who can maintain regular contact with buyers, interface with the government and handle the requisite paperwork, and ensure that service is maintained.

The traditional purchasing pattern is to go to Central de Abastoses (terminal markets) to choose product and either arrange for delivery or carry the product away. This is done most frequently by the small retailer and restauranteur. However almost all retailers and restauranteurs will utilize this method to some degree if only in time of emergency. It helps keep their inventory at low levels (Just In Time).

Distribution of Fresh and Horticultural Products

Although some major chains do direct buying of apples and pears the principle market for these products the Central de Abastos. Virtually all of Mexico's horticultural production and imports move through these markets.

The major retailers buy their produce from major wholesalers at the Central de Abasto as do smaller wholesalers who in turn supply corner grocery stores (known as abarroteros) and individual restaurants. Consumers can and do purchase here -- but this is believed to account for a small share of sales.

The largest of these wholesale markets -- reportedly the largest in the world --

is located in Mexico City. It is reported that 40% of all fruits and vegetables produced in Mexico and 80% of all fruits and vegetables consumed in Mexico City pass through this one market. A visit to this market is absolutely essential for anyone in the food business interested in understanding Mexico's food distribution system. If you want to see it in full-swing, visit during 6:00 to 9:00 a.m. If you want to have meetings with the trade, go after 10:00 a.m. Because it is a bit of a maze and overcrowded with cars and trucks, it is advisable to get a map at the administration offices before entering. Below are some facts on the Central de Abasto in Mexico City:

Total area	810 acres
Total outlets	2,000.0
Refrigeration capacity	1,500 metric tons
Daily visitors	235,000.0

Association for fruits and vegetable-CEDAAC (Central de Abastos de la Cuidad de Mexico) run by the biggest importer and distributors.

Transportation

Mexico's major markets, with the exception of resort areas and it's border cities, are all in the interior. Thus, overland transportation is generally the best option.

Highway

The highways are divided into two classes in Mexico: cuotas (toll roads) and libres (free roads). The cuota systems is run by private Mexican corporations on concession from the Mexican government. Cuotas run between every major city in Mexico and to every major border crossing. These roads are modern and kept in excellent condition and greatly reduce the amount of time of travel and transportation time. However the fee for using these roads is high. For example the cuota from Mexico City to Acapulco takes 3 hours to travel while the libre may take as long as six hours. However the cost is in excess $250 pesos (US$30) each direction. Most truckers will either opt for the libres or use a combination of cuotas and libres in long distance travel.

Railroads

The rail systems (Ferrocariles Nacional de Mexico) are still under Governmental control. In 1997 the government plans to privatize the entire rail system (passenger and freight). The companies that are looking to control the private rail systems are mostly joint ventures between Mexican companies and foreign concerns (the majority are US based railroad companies). The rail system will need to undergo extensive renovation to bring it up to international standards.

Currently some US companies offer freight transportation by railroad.

Air Transportation

All Mexican and most foreign airlines offer air freight services to and within Mexico. The price is significantly higher. However air transportation carries two distinct advantages: (1) the transit time of shipping by air over other methods are greatly shortened; (2) the custom procedures will be performed at the airport in the interior, which are less crowded than the border custom clearing areas thus reducing clearence time.

Water Transportation

The Mexican government has begun the process of privatizing the seaports. This is leading to an upgrading of services and facilities in the port areas. The largest and busiest port city is Veracruz. Once freight has landed it must be transported over land to point of destination. (Example- Veracruz to Mexico City 6-8 hours travel time)

Market Segments

Distribution channels in Mexico run a wide variety of modern and traditional methods. The distribution channel to utilize will depend on the market intended to be impacted. The target market in Mexico for apple and pears can be broken down into two groups: Traditional retailing (Abarrotes: Central De Abasto, wholesalers and retailers) and Modern retailing (Supermarkets, Club Stores, Cstores).

Traditional Retail Distribution

Traditionally food products reach the end consumer through small corner grocers known as abarroteros. There are over 400,000 of these types of stores in Mexico. They serve their immediate neighborhood and carry a limited range of goods. They allow consumers to make small purchases on a regular basis because of ease of shopping and proximity. They also perform well during times of economic difficulty because they extend credit to their customers.

These 400,000 outlets are serviced by 22,000 wholesalers (known as mayoristas or media-mayoristas). They supply dry goods, refrigerated and frozen goods, dairy, tobacco, grains among other products. Of these wholesalers 43% have refrigeration capacity, 34% deliver and 13% deliver to restaurants. They are generally located in the Central de Abastos.

While manufacturers can sell directly to these wholesalers they general sell through distributors. There are half dozen large distributors in the market. The largest distributor to this marketplace has 35 outlets covering every state

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in Mexico.

Modern Retail Distribution

Modern supermarkets, convenience stores and clubs stores are abundant in Mexico and rapidly growing.

Supermarkets

There are over 2,000 supermarkets throughout Mexico. Most are concentrated in the larger population centers. The supermarket industry is classified into different categories, depending on the size of the outlet. The industry can be classified as follows:

Megamercados (Megamarkets)- They have a sales area of over 10,000 square meters (100,000 square feet). They handle a full line of products from food, clothing, records and CDs, electronic goods, autoparts and house repair products.

Hipermercados (Hypermarkets)- They have a sales area of between 4,500 and 10,000 square meters (45,000-100,000 sqft). They handle a full line of products.

Supermercados (Supermarkets)- They have a sales area of 500-4,500 square meters (5,000-45,000 sqft). They handle mainly refrigerated, perishable and dry groceries and in most cases pharmacy services.

Bodega (Warehouse stores)- Normally they will have over 2,500 square meters (25,000 sqft.) of sales area and will handle a full line of products with a system of discounts for large purchases. There is little emphasis on decor and services offered to their clients.

Club de Membresia (Club stores)- Generally they have a sales area greater than 4,500square meters (45,000sqft). They handle a full line of products. They sell mainly wholesale and half wholesale (less that case). The people who shop in these club stores are required to have a membership.

There are three major national chains:

Gigante-Operates Hypermarkets (Gigante-35), Bodegas (Bodega G-152) and supermarkets (Gigantes-4) nationwide.

Operadora Comercial Mexicana-Operates Hypermarkets (Comercial Mexicana-68), Bodegas (Comercial Mexicana- 24) and Club Stores (Price Club-13)

Grupo Cifra- Operates Hypermarkets (Aurrera-36, Grand Bazar-3), Bodegas (Bodega Aurrera- 56), Supermarkets (Superama-36), Club Stores (Sam's Club's-28),

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Megamercados (Walmart- 19)

The major regional chains are:

Casa Ley- Operates Hypermarkets and Supermarkets (Casa Ley-72) in the northern tier of the country. Based in Culican, Sinaloa.

Organizacion Soriana- Operates hypermarkets (Soriana-54) in the northern part of the country. Based out of Monterey, NL

Tiendas Chedraui- Operates supermarkets (Chedraui-37) in the southeastern part of the country. Based in Jalapa, Veracruz.

Governmental Retail Chain

ISSSTE- The social security administration has a chain of supermarket (694) which comprises the largest number of supermarkets under one banner in Mexico. They operate under the acronym, ISSSTE. They run the full range from the upscale megamercado to the smaller supermarkets. The prices are usually more competitive since they are government run.

Company name Type (Brand name-units		Number of units
Gigante		191
Hypermarkets	(Gigante-152)	
Warehouse Stores	(Bodega G-35)	
Supermarkets	(Gigante-4)	
Grupo Cifra		178
Megamarkets	(Walmart-19)	
Hypermarkets	(Aurrera-36)	
Hypermarkets	(Gran Bazar-3)	
Warehouse Stores	(Bodega Aurrera-56)	
Supermarkets	(Superama-36)	

Club Stores	(Sam's Club)	
Comerical Mexicana		105
Hypermarkets	(Comercial Mexicana-68)	
Warehouse Stores	(Comercial Mexicana-24)	
Club Stores	(Price Club-13)	
Kmart		4
Megamarkets	(Kmart-4)	
Government Outlets		694
Supermarkets/Pharmacies	(Issste-694)	

Regional Name of operation (HQ location)	Number of units

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Agricultural Situation

DISTRIBUTION CHANNELS

NORTH	
Casa Ley (Sinaloa)	72
Soriana (Monterrey, NL)	54
Central de Detallistas (Baja California)	37
Comercial VH (Sonora)	32
Futurama (Chihuahua)	21
Operadora Merco (Coahuila)	14
Areli (Tampaulipas)	13
MEXICO CITY	
Sumesa	17
SOUTH	
Chedraui (Veracruz)	37
Super San Fransisco (Yucatan)	22
Fenix (Veracruz)	13
Super Bodega de Corodoba (Veracruz)	11
SUBTOTAL	1,518
OTHERS*	1,260
TOTAL	2,778

*Estimation Source: Abarrotes y Mas magazine & ANTAD

Club Stores

Club Stores have become a major distributing force in Mexico. The two largest are Sam's (28 units) and Price (13 units). They target the institutional markets, the three largest being grocery, foodservice and stationary trades. Price Club has a large selection of fruit and vegetables in their outlets.

Convenience Stores

Convenience stores in Mexico were started by the beer companies as an outlet for their products. Most C-Stores carry a limited supply of fruits and vegetables but is not considered a major out for these types of products. The chain largest is OXXO, 624 outlets through out the country, is owned by Cerveceria Cuauhtemoc of Monterrey, Nuevo Leon. The latest entries into the marketplace have been the US based chains, 7-Eleven, Circle K, and Dairy Mart. C-Stores have traditional been freestanding retail outlets. However Pemex (Petroleos Mexicanos), the governmental gasoline distribution company, which franchises or owns all of the gas stations in the country, have focused on bring c-stores to their locations. Currently only 9% of the ?Pemex? stations have C-stores attached.

Convenience store

Agricultural Situation
DISTRIBUTION CHANNELS

Convenience store	Units
?Cadena? ?Comercial? ?OXXO?	624
7Eleven	198
?Tiendas? de ?Conv?. (12+12)	39
Other*	750
TOTAL	1,611

* Estimation
Source- ?Abarrotes? Y ?Mas? magazine; ?ANTAD?

Industry Associations

The largest association for the supermarket and C-store trade is ?ANTAD?, ?Asociacion? ?Nacional? de ?Tiendas? de ?Autoservicios? y ?Departamentales? (nat association of supermarket and department stores). Their main offices are in Mexico City and once a year hold the largest trade show for the supermarket trade in Guadalajara, ?Jalisco? (generally in March).

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