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## The Beer, Spirits and Wine Market in Mexico

March 1998

*(Également disponible en français sous le titre,  
Le marché de la bière, des spiritueux et du vin au Mexique)*

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Canada

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## THE BEER, SPIRITS, AND WINE MARKET IN MEXICO

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### EXECUTIVE SUMMARY

Approximately 20% of Mexico's 93 million people can afford imported processed foods. Mexico's processed food market is concentrated around the large urban centres such as Mexico City, Guadalajara, and Monterrey. Nearly one-quarter of all food processing occurs in Mexico City. Nevertheless, expansion into Queretaro, Puebla, Hermosillo, and other smaller cities is becoming more common.

In 1995, sales of alcoholic beverages totalled US\$2.3 billion down from US\$3.7 billion in 1994. However, sales of most alcoholic beverages made strong gains in 1996, returning to levels comparable to those of 1994.

As the Mexican economy recovers from the peso crisis, consumers have shown a growing interest in purchasing higher quality products. The combination of continued growth, a further reduction of tariffs, and a new interest in higher quality products has created opportunities for the export of alcoholic beverages to the Mexican market.

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## THE BEER, SPIRITS, AND WINE MARKET IN MEXICO

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### MARKET OVERVIEW

#### Market size and projections

The Mexican alcoholic beverage market continues to be dominated by beer sales which account for nearly 75% of all alcoholic beverage sales in Mexico. Sales of other spirits (tequila, rum, and brandy) make up roughly 22% of the total market, while wine sales capture only 3-4% of total sales.

As shown in table 1, the market for alcoholic beverages grew as a whole between 1990-1994, and then suffered a sharp decline in 1995 during the peso crisis.

**Table 1: Mexican Sales of Alcoholic Drinks By Type, 1991-1995 (US\$ millions)**

Type of Drink	1991	1992	1993	1994	1995
Beer	1,575.6	1,862.7	2,287.6	2,557.0	1,659.0
Wine	355.7	232.2	179.7	163.8	108.0
Brandy	293.5	360.9	376.7	470.6	263.0
Spirits	385.9	369.4	450.4	543.2	274.3

Source: *Euromonitor, Alcoholic Drinks in Mexico, March 1997.*

Consumption of alcoholic beverages also changed significantly during the early 1990's. The beer market, which accounted for 65% of Mexicans' expenditures on alcoholic beverages in 1990, now represents nearly three-quarters of this market. On the other hand, Mexicans' expenditures on wine dropped by over 70% during the same period.

The fluctuations in consumption of certain types of alcohol reflect the notable changes in the Mexican economy during the last few years. While more expensive spirits and wines suffered during the peso crisis, cheaper alcoholic drinks, which enjoy a wide popularity, showed less significant losses. Long-term growth in consumption of all alcoholic beverages is expected to persist as the Mexican economy continues to

strengthen. New products which target middle and upper income groups as well as tourists should also grow as consumer purchasing power improves.

Unlike American, Canadian, or European markets, sales of draught beer in Mexico represent less than 1% of total beer sales, as shown in Table 2. Concerns over water purity during the beer making process are responsible for the limited sales of draught beer.

**Table 2: Mexican Sales of Beer by Pack Type, 1991-1996 (% Volume)**

Pack Type	1991	1992	1993	1994	1995	1996
Returnable Bottles	83.5	80.7	79.5	79.6	79.6	83.9
Cans	16.1	18.9	20.1	20.2	20.2	15.5
Draught	0.4	0.4	0.4	0.2	0.2	0.6

Source: *CNICM, Beer Markets In Central and South America - Country-by -Country Analysis, May 1997.*

The Mexican government recently passed a bill that increased excise taxes (a tax on brewery production) by 19% to 25%. According to a study by the Serfin brokerage house, this price increase, averaging 23% to the end consumer, is expected to result in a 5.2% decline in beer sales in 1998. Sales had previously been forecast to increase by 5.5% in 1998.

Brandy is the most highly consumed spirit in Mexico. Although sales declined during the peso crisis, brandy has experienced impressive overall growth in popularity during the 1990's. Up to 90% of brandy consumption now occurs in private residences.

Beer, brandy, and tequila are the most widely consumed alcoholic beverages in Mexico. This is predominately due to the availability and cheap cost of these drinks. Although middle to upper-income Mexicans also consume beer and tequila, they are also the primary consumers of other alcoholic beverages such as wines, other spirits, and mixed drinks.

Per capita consumption of wine was 0.5 litres in 1995. Considering that only 20 million Mexicans are capable of purchasing wine, consumption is actually four times the official per capita total. Consumption levels are slightly inflated by the the more than one million Canadian tourists and some 50 million US tourists that visit Mexico on an annual basis.

In 1994, wine production began a major shift from producing large quantities of red wine to large quantities of white wine. Seventy-five percent of wine production was red until the peso crisis. Mexican producers increased white wine production, which is now higher than red wine production, in an attempt to regain a portion of this market from the dominant German imports.

Import duties on foreign wines raise the price by approximately 20%. While Chilean imports are tariff-free, Canadian and US imports face a 10% tariff, to be phased out by 2003.

Pre-mixed spirits are also anticipated to grow in popularity. Allied Domecq introduced the first pre-mixed spirit, President Cola (a mix of brandy and cola), in March 1995. Herradura Tequila also lauched a pre-mixed spirit of tequila combined with grapefruit at the end of 1997. Euromonitor predicts that these convenient products will be extremely popular among tourists and middle to upper-income Mexicans.

Mexico's large population gives the impression of a large consumer base, but only one-fifth of the population can afford imported processed foods, especially higher-end alcoholic beverages. Although middle-income and younger consumers often enjoy trying "trendy" drinks, price and quality will remain a priority in expanding the consumer base. Midori, a Japanese melon liqueur, is just one example of a "trendy" drink that has become so popular that the Mexican government has licensed it to be manufactured domestically.

Several other high-priced coffee liqueurs have also appeared on the Mexican market in recent years. While these regionally produced liqueurs tend to lack eye-catching labelling and bottling, manufacturers of these products have shown an interest in establishing strategic alliances with foreign companies.

## COMPETITIVE ENVIRONMENT

### Local capabilities

Mexico is the world's eighth largest producer of beer. There are three beer producers in Mexico: Modelo, Femsa and Cerveceria Rio Bravo (American Craft Brewing). Both Modelo and Femsa are large, well established breweries that have existed for over 100 years and control nearly every aspect of the beer making process. They have strengthened their position in the Mexican market by purchasing smaller producers to eliminate their competition.

Grupo Modelo and Femsa also oversee their own retail outlets (Femsa owns the OXXO stores and Modelo owns the Modelorama franchises), as well as the construction of their own containers and packaging.

American Craft is a small foreign-owned micro-brewery that has only been present in Mexico for a few years. Operating under the label Cerveceria Rio Bravo, America Craft has grown steadily since its appearance on the Mexican market. Nevertheless, it holds a very small share of the market, as much of its beer is shipped north to exploit the demand for Mexican beer in the United States.

Total imports of beer into Mexico currently represent a negligible amount of the market. Any company wishing to export beer to Mexico would most likely have to go through one of the two large beer producers, although the American Craft microbrewery is an example of a successful foreign producer. Large beer companies, such as Anheuser-Busch and Labatt Brewing Co., have purchased interest in Grupo Modelo and Femsa respectively in order to gain access to Mexican brands for distribution in the US.

Beers produced by microbreweries are expected to grow in popularity over the next few years. Lower NAFTA import tariffs (to be phased out by 2003), in conjunction with an increased variety in tastes, will be responsible for the increased popularity of these drinks. Although real growth of microbreweries may be significant, the market share held by these brewers will remain at a minimal level. A small chain of micro-brewery restaurants, called the Sante Fe Beer Factory Restaurant, have already experienced a great deal of success in this market. Another competing micro-brewery restaurant, Cerveceria San Angel, was also recently inaugurated in Mexico City.

Many Mexican grape growers and wine producers did not survive when the market was opened up to foreign competition in 1987. Only a handful of Mexican producers continue to operate with Allied Domecq controlling roughly 65% of the market.

In 1996, Mexico imported US\$25.4 million worth of wines. The majority of these imports originated in Spain, Germany, and Chile. Canadian exports currently face a 10% tariff and were valued at approximately US\$3,000 in 1996.

### International competition

Imports account for a shaky 1% of the Mexican beer market. Since the peso crisis imported beers have had difficulty succeeding in Mexico. In 1995, the United States was the source of 95% of Mexico's imported beer. Other sources include the Netherlands (2%) and Guatemala (1.25%).

Wine imports make up approximately 16% of the total market in Mexico. Most imports come from Chile (tariff-free), Spain, and Germany, all of which have long traditions of exporting wine to Mexico. These wines are available in supermarkets as well as speciality stores.

The brandy market in Mexico is also dominated by domestic producers. The main producers - Allied Domecq, Compania Vinicola del Vergel (a subsidiary of Bacardi and Company), Compania Vinicola de Aguascalientes, and Casa Madero - who sell directly to wholesalers and retailers, account for over 95% of brandy sales in Mexico. Spanish imports held 98% of the remaining market in 1995.

### Canadian position

Canadian companies have a limited presence in the Mexican beer market. They accounted for less than half of one percent of total Mexican imports in 1995. This could change over time, as young people have a

growing taste for North American style beers - particularly Budweiser and Labatt products.

In 1994, Femsa formed a strategic alliance with John Labatt Ltd. Labatt acquired 22% of Femsa for US\$510 million, with the option to acquire an additional 8% by 1998. During 1997, US brewer, Anheuser-Busch increased its share of Modelo by 13.5% to bring its total share of the company to 50.2%. Opportunities for strategic partnering with either Modelo or Femsa are limited, but may exist with Mexico's first micro-brewery Cerveceria Rio Bravo (the Mexican branch of American Craft Brewing International Limited).

Canadian exports of wines and spirits currently have a limited presence in the Mexican market.

## **MARKET LOGISTICS**

### **Channels of distribution**

Historically, bars and restaurants dominated beer sales in Mexico. Recently, however, there has been dramatic growth in sales of beer through other sources such as grocery stores. Bars and restaurants currently account for approximately 25-30% of beer sales in Mexico. This shift in sales is partially attributable to an increase in sales of canned beer, which are easily transported and stored by consumers. Many retail outlets (80% as of 1993) are involved in exclusive distribution agreements with one of Mexico's larger brewers.

In Mexico, retailing is broken down into two sectors: modern and traditional.

The modern sector is comprised of supermarkets, hypermarkets, discounters, and convenience stores. The expansion of this sector, specifically of grocery and convenience stores, has allowed consumers greater access to beer. The modern sector has been steadily increasing its market share - a trend that is expected to continue. Middle to upper-income consumers are the main clientele for this sector.

The traditional sector includes general stores, food specialists, kiosks, liquor stores, open/closed markets, and non-specific outlets. While this sector has lost substantial market share to the modern sector, it remains important in Mexico's food distribution system. Traditional sector stores are where Mexicans buy the products they use on a regular basis (eg. bread, milk, eggs). This sector has also performed well during economic downturns since store owners are more willing to extend credit to their customers.

Total national distribution is only possible with successful entry into both sectors.

### **Direct sales**

It is possible to sell directly to some larger retailers in the modern sector, but they must be registered in the import registry. Direct sales to smaller stores in the traditional sector are less likely. Selling directly to smaller traditional stores necessitates that a Canadian company set up a local office. Under Mexican law, goods may only be imported by a person/company listed in the Importers Registry who has a registered taxation number (Registrio federal de Causontes (RFC), and a local address.

### **Agents and Distributors**

Despite recent advances in retailing, Mexico remains a fragmented market with an underdeveloped distribution system. Therefore, to ensure proper distribution for the product, exporters should retain the services of an agent/distributor. More than one agent/distributor may be required to ensure national distribution.

#### *Agents*

An agent is a good way to introduce a new product to the Mexican market. Agents generally solicit business' and enter into agreements on behalf of the exporter they are representing, but do not take

ownership over products they sell.

When looking for an agent, consider the following:

- Region covered;
- Products handled;
- Product knowledge;
- Commission required;
- Reputation;
- Track record;
- After sales service; and
- Size and quality of sales staff.

Exporters must ensure that the exporter-agent relationship is not interpreted as an employer-employee relationship, as this can have serious ramifications under Mexican tax and labour laws.

### *Distributors*

In Mexico, distributors usually handle products on an exclusive basis. This makes the choice of a distributor very important because Mexico has few national distributors.

When looking for a distributor, use the same criteria specified for an agent plus the following:

- Their relationships with local governments;
- Their relationships with buyers;
- The condition of their facilities;
- Their willingness and ability to keep inventory; and
- Their relationships with Banks.

## **Market Entry Considerations**

### **Suggested business practices**

#### *Cultural etiquette*

Companies that do business in Canada and the United States tend to consider cultural differences as a normal part of conducting their business. These companies have become accustomed to adapting their products and marketing techniques to appeal to varying markets. Canadians have also become accustomed to different cultural behaviours and reactions depending on the specific situation. Within Canada and the United States, these differences are relatively minor and the overall style of conducting business tends to be quite uniform.

Doing business in Mexico is significantly different. Differences in tastes and marketing methods are only a small part of the overall picture. There are major cultural differences that affect virtually every aspect of business relationships. Mexicans have a long tradition of protectionism which has insulated them from the ways that other countries do business. Lack of exposure to Canadian business practices means that they may react badly to visitors who do not share their own values. In order to establish a successful business relationship it is essential for Canadian exporters to understand and adapt to Mexican customs.

It may, at first, appear that goods could be shipped to Mexico with the same kind of adaptations that are common within the Canadian market. This is certainly true in some cases. However, establishing a long-term presence in the local market is a key to operating successfully in Mexico. Only by maintaining a high degree of cultural sensitivity, showing a great deal of patience, and establishing a long-term presence in the market, can a business hope to succeed in Mexico.

### **Import regulations**

Copies of all shipping documents should be faxed to the importer and/or customs broker before the shipment leaves Canada. This allows the importer to make revisions and/or acquire special permits if needed. The original documents should accompany the shipment, and the importer/broker should be advised when and how the goods were shipped.

### Required documentation

#### *Commercial Invoice*

A commercial invoice must accompany every shipment. The invoice should be in Spanish or be accompanied by a Spanish translation. The invoice should be accurate, complete and signed by the exporter. Any errors or omissions can result in delays, fines or confiscation. The invoice must contain the following information:

- place and date of issue;
- complete name and address of the buyer/importer in Mexico;
- complete name and address of the exporter;
- detailed description of the merchandise, including identifying marks, numbers, types and quantities;
- all freight and insurance charges;
- signature of responsible officer, along with name and title; and
- shippers invoice number and customer's order number.

The importers *Registro Federal de Causantes (RFC)* (taxation registration number) should also appear on the invoice.

Copies of catalogues or other promotional literature should also be sent along with numerous copies of the commercial invoice. The number required will vary depending on the importer or customs broker used, although up to 11 copies may be needed.

#### *Export Declaration Form (Form B13)*

This form is required by Canada Customs and is used by the Canadian government to provide input in the System of National Accounts. The exporter is responsible for the completion of the export declaration although the work is often prepared by the exporters agent, broker or carrier.

An export declaration is necessary for:

- commercial shipments valued at C\$2000 or more;
- goods in transit through the US; and
- goods exported from a bonded warehouse;

#### *Packing List*

A packing list is only necessary when there are multiple packages and the commercial invoice does not provide the necessary information. The list should include:

- the number of packages and a detailed list of their contents;
- the net, gross and legal weight of each package expressed in metric units;
- the volume and/or measurements of each package; and
- the volume and/or measurements of the shipment as a whole.

Four to seven copies will be required depending on the mode of transportation used.

#### *Bill of Lading*

This document is the shipper's acknowledgement of receipt of the shipment. It should contain the following information:

- types of packages and their weights and measurements;
- names and address of the shipper, Mexican importer, and the consignee or customs broker;
- ports of origin and destination;



- description of goods;
- list of freight and other charges; and
- the number of bills of lading in the full set.

#### *Import Permit*

An import permit is not required for alcoholic beverages. However, all imports of alcoholic beverages have to be notified to the Secretaria de Salud with an import notification letter.

#### *Certificate of Origin*

There are two variations of this certificate for Mexico: the NAFTA Certificate of Origin and the General Certificate of Origin.

The NAFTA Certificate is a uniform document used by all three countries. Its purpose is to confirm that the goods meet the NAFTA rules of origin, and is only needed if preferential treatment is being sought under NAFTA. It can be completed in English or Spanish, at the importer's discretion. The certificate must be signed by the exporter, and is valid for shipments made within any 12 month period specified on the certificate. The certificate is not required for shipments valued at less than US\$1200, although a statement of origin should be included on the invoice.

#### *Certificate of Compliance*

The sale and production of alcoholic beverages in Mexico is governed by *NOM-142-SSA1-1995*. As such, all alcoholic beverages produced for sale in Mexico must be tested and a certificate of compliance obtained from the *Secretaría de Comercio y Fomento Industrial (SECOFI)*, *Dirección General de Normas* (Secretariat of Commerce and Industrial Development, Bureau of Standards) or from an agency accredited by them. This certificate must accompany the goods when they are imported. Canadian exporters will have to obtain the appropriate documentation from the importer. The certification number and NOM logo must be included on the products' label.

#### Authentication of documents

Documents that need to be authenticated, such as certificates of sale and letters authorizing an exporter's local agent or importer to act on their behalf, must first be notarized in Canada. Then, the notarized documents can be authenticated by sending them to (there is no fee for this service):

Department of Foreign Affairs and International Trade  
Authentication and Service of Documents (JLAC)  
125 Sussex Drive, Ottawa K1A 0G2  
Telephone: (613) 992-6602  
Facsimile: (613) 992-2467

#### **Customs duties, tariffs and taxes**

Under NAFTA, tariffs on all alcoholic beverages will be reduced to zero by the year 2003. Tariffs on brandy, beer and wine currently stand at 10%. Brandy and wine tariffs are set to be reduced by 2% per annum until they reach zero in 2003. Beer tariffs, on the other hand, will also be reduced by 2% per year until the end of 2000 when they will decline from 6% to zero. In addition, there is a special 21.5% tax (IESPS - Impuesto Especial Sobre Productos y Servicios) on products and services related to imports as well as a 15% value added tax.

#### **Local standards, certificates or registrations needed**

Many products, both imported and domestic, are governed by specific quality standards known as *Normas Oficiales Mexicanas* (NOMs). These standards cover product-specific technical issues, including special labelling requirements. Alcoholic beverages are governed by *NOM-142-SSA1-1995*, which defines an alcoholic beverage as any beverage with an alcohol level ranging from 2% to 55% at 20 degrees celsius. This NOM was published on July 9, 1997 and regulates both health and labelling requirements.

#### Health and food safety

*Secretaría de Salud* (Secretariat of Health) enforces health and food safety standards, as set out by *the Ley General de Salud* (Health Act). This act regulates the production of food and beverages, restricted food additives, micro organisms, chemicals and other residues in the production process. These regulations apply to both domestic and imported goods.

The *Secretaría de Salud* performs random inspections of products currently on the shelves to ensure compliance with the regulations. If a product fails to meet the NOM standards it will be pulled from the shelves, and the store is subject to heavy fines.

#### Packaging and labelling

According to NOM-142-SSA1-1995 the labels on alcoholic beverages must include the following:

- name or trade mark of the product;
- generic name of the product;
- net contents;
- alcohol level (using the abbreviation %Alc);
- name and full address of the importer;
- all information must be in Spanish (stickers can be used).

As of March 1994, compliance with labelling requirements have become the responsibility of the exporter. This means exporters can no longer make arrangements to have Spanish stickers applied to products after they enter Mexico before their sale.

A sample of the product should be sent to Mexican customs officials to ensure that NOM labelling requirements are met.

Mexican officials are currently establishing warehousing firms to become special verification units for alcoholic beverages. These verification units will inspect all goods, at the expense of the exporter, to guarantee that products adhere to the new Spanish-language label rules. Verification units have yet to be approved by the Mexican government and until that time, suppliers, through their importers, will need to have the Direction general de normas (SECOFI DGN) approve all labelling.

#### **Export credit risks, restrictions on letters of credit or currency controls**

There are four methods of financing international trade transactions with Mexico: Advance payment, Letter/Line of Credit, Bill of Exchange, and Open Account Trading. The recommended method is a Letter of Credit with the usual term of 90 to 180 days, as it carries the lowest risk. Lines of credit from Mexican financial institutions should not exceed the limits outlined in Table 3, and caution should be used with Letter/Lines of credit opened by second-tier banks.

The Canadian Export Development Corporation (EDC) does not have a financing program available to aid Canadian companies with exporting consumer goods to Mexico. However, the EDC does have other financial instruments that can lower the risk of exporting -assessed on a case by case basis. Additional information can be obtained directly from the EDC (see Appendix D).

**Table 3. Lines of Credit Available Through Mexican Institutions (in US\$)**

**Bank**

**Line of Credit**

Banca Serfin, S.A.	20 million
Bancomer, S.A.	75 million
Banco Nacional de Comercio Exterior, S.N.C.	90 million
Banco Nacional de México, S.A. (Banamex)	125 million
Banco Nacional de Obras y Servicios Públicos, S.N.C. (Banobras)	20 million
Comisión Federal de Electricidad (CFE)	30 million
Nacional Financiera, S.N.C. (Nafin)	28 million
Petròleos Mexicanos (Pemex)	14.6 million
Teléfonos de México, S.A. de C.V. (Telmex)	35 million

Source: Canadian Export Development Corporation, 1997.

## PROMOTIONAL EVENTS

### Event / Description

Expo Alimentos '98  
Monterrey, Mexico  
September 2-4, 1998  
(Food and Beverage Show)

Expo of the Americas  
Mexico City, Mexico  
May 27-29, 1998  
(Food Equipment &  
Food and Beverage Show)

Hostal '98  
Guadalajara, Mexico  
September 10-13, 1998  
(Products and Services related  
to the Hotel & Restaurant Industry)

Restaurant, Hotel & Food Show '98  
Monterrey, Mexico  
November 5-7, 1998  
(Newest products of the food & beverage  
industry, machinery & equipment)

ABASTUR 98  
Mexico City, Mexico  
October 7-9, 1998

### Organizer

Cintermex,  
Centro Internacional de Negocios,  
Monterrey, A.C., Ave. Fundidora 501  
Monterrey, N.L., Mexico C.P. 64010  
Tel: (52) 8 369-6910  
Fax: (52) 8 369-6911  
[cintermex@ss20.mty.itesm.mx](mailto:cintermex@ss20.mty.itesm.mx)  
[www.cintermex.org.mx](http://www.cintermex.org.mx)

E.J. Krause & Associates Inc.,  
6550 Rock Spring Drive, #500  
Bethesda, MD, U.S.A.  
20817-1126  
Tel: (301) 493-5500  
Fax: (301) 493-5705  
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## KEY CONTACTS AND SUPPORT SERVICES

## Mexican Government Contacts in Canada

Mexican Embassy  
45 O'Connor Street  
Suite 1500  
Ottawa, ON, K1P 1A4  
Telephone: (613) 233-8988  
Facsimile: (613) 235-9123

Bancomext Toronto  
66 Wellington St. W.  
P.O. Box 32, Suite 2712  
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E-mail: [honeyman@em.agr.ca](mailto:honeyman@em.agr.ca)

Business Development Bank of Canada  
Specialized financing for small and medium sized  
business  
Telephone: 1-800-463-6232

Canadian Commercial Corporation  
*Export contract advice and assistance*  
Telephone: 1-800-748-8191

Department of Foreign Affairs and  
International Trade  
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125 Sussex Drive  
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Alliance of Manufacturers and Exporters  
Canada  
*Canada's leading business network*  
Telephone: (613) 238-8888 or  
(416) 798-8000

NORTHSTAR  
Trade Finance Inc.  
Telephone: (604) 664-5828

**Mexican government offices in Mexico**

Secretaría de Hacienda y Crédito Público  
(Hacienda)  
Palacio Nacional  
1 Patio Mariano  
06066 México, DF, México  
Telephone: (52-5) 518-2060/2711  
Facsimile: (52-5) 542-2821, 510-3796

Banco de Mexico  
Apartado Postal 98 Bis  
06059 Mexico City, Mexico  
Telephone: (011-55-5) 237-2000  
Facsimile: (011-55-5) 237-2370

Cámara Nacional de Comercio  
(National Chamber of Commerce)  
Avda Insurgentes Sur 1844, Col. Guadalupe  
Inn. 06769 México, DF  
Telephone: (52-5) 534-5169

**Chambers of commerce and industry associations**

Control Sanitario de Bienes y Servicios  
Lleja 7, Piso 7  
Col. Juárez  
06600 México, DF, México  
Telephone: (52-5) 518-3696  
Facsimile: (52-5) 521-9628

Secretaría de Comercio y Fomento  
Industrial  
(SECOFI)  
Calle Alfonso Reyes No. 30  
Cal. Condesa  
06140 México, DF, México  
Telephone: (52-5) 211-0036, 286-1757,  
286-1823, 286-1461  
Facsimile: (52-5) 244-3000, 286-0804,  
286-1551, 286-1543

**Canadian banks in Mexico**

Royal Bank of Canada  
Hamburgo 172, Piso 5  
Col Juárez  
06600 México D.F.  
Telephone: 98-505-207-2252  
Facsimile: 98-505-208-1592

Bank of Montreal  
Horacio NO. 1855 - Desp. 301  
Col. Polanco  
11560 México, D.F.  
Telephone: 98-505-203-8211/8443  
Facsimile: 98-505-203-8542

Bank of Nova Scotia  
Hamburgo No. 213, Piso 10  
Col Juárez  
06600 México, D.F.  
Telephone: 98-505-256-0622  
Facsimile: 98-505-511-1300/5832

Toronto-Dominion Bank  
Paseo de la Reforma No. 389 Piso15  
Col. Cuauhtémoc  
06500 México, D.F.  
Telephone: 98-505-207-3816/3844  
Facsimile: 98-505-207-3836

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- Business Mexico, Vintage Industry Finally Comes of Age, November, 1996.
- Corporate Mexico, Higher Beer Tax Will Cost Breweries 5% of Sales this Year: Serfin, January 7, 1998.
- Dun & Bradstreet Inc., Exporter's Encyclopedia, 1996.
- ERC Statistics International, Beer Markets in Central and South America - Country- by-Country Analysis, May 1997.
- Euromonitor, Alcoholic Drinks in Mexico, March, 1997.
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- Journal of Commerce and Commercial, Mexico Seeks Special Verification Units to Check Alcoholic Beverages, January 9, 1998.
- U.S. Department of Agriculture, Mexico: Annual Wine Report, December 10, 1996.
- U.S. Department of Agriculture, Mexico: Annual Brandy Report, December 10, 1996.
- World Trade Atlas, 1997.

## OTHER REFERENCE MATERIAL

### Useful Internet Sites

- Agri-Food Trade Service <http://atn-riac.agr.ca>
- Canadian Embassy in Mexico <http://www.canada.org.mx/>
- DFAIT Website <http://www.dfait-maeci.gc.ca>
- Exporti - Information Source on Mexico <http://www.dfait-maeci.gc.ca/exporti/menu-e.asp>
- InfoExport <http://www.infoexport.gc.ca>
- INFOMEX <http://www.infomexmr.com>
- Strategis <http://strategis.ic.gc.ca/engdoc/main.html>
- Trade Show Central <http://www.tscentral.com>

## READER EVALUATION

Please help the Team Canada Market Research Centre to produce market reports which meet your information needs by completing this evaluation form and returning it by facsimile at (613) 943-8820. Thank you for your valuable input.

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### 1. How did you obtain a copy of this market report?

- InfoCentre FaxLink system     Government worldwide web site  
 InfoCentre help line         InfoCentre bulletin board system  
 Local government office     Other: \_\_\_\_\_

### 2. How would you describe this market report?

	Strongly agree	Agree	No opinion	Disagree	Strongly disagree
Useful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well organized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well written	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideal length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**3. In what form do you prefer to obtain these reports?**

- Print       Electronic

**4. Based on the information in this report, what specific action(s) does your organization plan to take in this market? Check all that apply.**

- Seek an agent/distributor       Contact Canadian trade office abroad  
 Visit the market       Participate in a trade show abroad  
 Do more research       Nothing  
 Other: \_\_\_\_\_

**5. What other market reports would be of benefit to your organization? Please identify specific products and countries.**

\_\_\_\_\_

\_\_\_\_\_

**6. Which of the following categories best describes your organization? Check one only.**

- Processor/manufacturer       Government  
 Trading house       Student/academia  
 Export service provider       Consultant  
 Industry/trade association       Other: \_\_\_\_\_

**7. What were your organization's total sales last year, in Canadian dollars?**

- Less than 10 million       10 million to 50 million  
 More than 50 million       Not applicable

**Additional comments/suggestions for improvement:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**OPTIONAL** — The name of your organization is: \_\_\_\_\_

Canada