



Agriculture and  
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Canada




## The Pet Food Market in Mexico

July 1998

*(Également disponible en français sous le titre,  
Le marché des aliments pour animaux de compagnie au Mexique)*

Prepared by the  
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 Department of Foreign Affairs and

Canada

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## THE PET FOOD MARKET IN MEXICO

 Team  
Canada

### EXECUTIVE SUMMARY

In 1994 and 1995, the devaluation of the peso, inflation, and high consumer debt combined to create Mexico's worst economic crisis since the 1930s. There was a 36% decrease in per capita Gross Domestic Product (GDP), resulting in a 12% drop in consumer spending. The effects were visible throughout the Mexican economy, including decreased sales of processed foods. Mexico successfully dealt with this short term crisis in the first half of 1995, and the economy started to recover late that year.

Approximately 20% of Mexico's 93 million people can afford imported processed foods. Mexico's processed food market is centred around Mexico City, Guadalajara, and Monterrey but is expanding into Queretaro, Puebla, Morelia, Merida, Hermosillo, Veracruz and Acapulco.

The Mexican pet food market is divided into two segments: dog food (including canned, dried, mixers, biscuits and semi-moist products), and cat food (including canned, dry and semi-moist products). The total pet food market in Mexico steadily climbed from US\$116 million to US\$199 million between 1990-1994, but then dropped to US\$115 million in 1995.

The peso crisis caused pet food sales to fall by US\$80 million between 1994 and 1995, which resulted in 1995 sales figures falling below 1991 levels. Sales are forecasted to rebound in 1998 and 1999, but may dip slightly in the year 2000.

In light of the recovering Mexican economy and the rejuvenating pet food market, consumers should return to purchasing the higher quality products they used before the peso crisis. This may reveal opportunities for exporters now capable of selling to Mexico: as the battle for brand recognition and customer loyalty is reinitiated.

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THE PET FOOD  
MARKET IN MEXICO

 Team  
Canada

## MARKET OVERVIEW

### Market size and projections

Dog food is the largest segment of the market, accounting for over 80% of pet food sales in 1995. Due to the peso crisis, dog food sales declined by US\$70 million between 1994 and 1995 (Table 1), however, sales are forecast to recover in coming years. This drop wiped out much of the positive growth from the previous three years, which averaged at least 15% per year. Sales figures in 1995 were just over US\$115 million, slightly below 1991 pet food sales. Imports of pet food were valued at nearly US\$24 million in 1995, approximately 20% of the total market.

**Table 1. Mexican Pet Food Sales 1991-1995 (US\$ millions)**

Type	1991	1992	1993	1994	1995
Dog food	93.7	111.5	141.6	165.5	94.5
Cat food	22.8	25.6	28.4	33.9	21.4
Total Pet food	116.5	137.1	170.0	199.4	115.9

Source: Euromonitor, *Retailing in Latin America*, 1996.

As shown in Table 2, the volume of consumption of dog food increased by approximately 4% per year between 1991 and 1994. Pet food sales declined in 1995 due to lower disposable incomes. As a result, Mexicans reverted to feeding their pets table scraps. Growth is expected to resume in 1998, and should average an about 7% per year until the year 2000.

Cat food accounted for 18% of pet food sales in 1995. Cat food sales grew by over 10% a year between 1991 and 1994. In 1995, cat food sales began to decline, falling below 1991 levels. Once again, this decrease was largely attributable to the 1994/1995 peso crisis.

**Table 2. Mexican Pet Food Sales by Volume 1991-1995 ('000 tonnes)**

Type	1991	1992	1993	1994	1995
Dog food	85.2	89.2	88.2	97.1	92.2
Cat food	12.7	13.5	14.2	15.8	15.3
Total Pet food	97.9	102.7	102.4	112.9	107.5

Source: Euromonitor, *Retailing in Latin America*, 1996.

Consumption of cat food follows the pattern set by dog food consumption: constant growth between 1991 and 1994, followed by significant declines in 1995. Similarly, consumption levels are expected to rebound in 1998, and are anticipated to grow at an average annual rate of 7% until the year 2000. Cat food consumption should return to its pre-peso crisis levels shortly after the turn of the century.

### The competitive environment

The pet food market is highly concentrated, as the top three producers (Ralston-Purina 30%, Mars Mexico 15% and Quaker Pet Foods 10%) control over half of the market. Competition has been increasing as manufactures launch new brands along with extensive advertising campaigns. There has also been a significant trend towards private pet food brands. All major supermarkets now offer their private brands of pet food at prices that are, in general, more affordable for consumers.

According to the United States Foreign Agricultural Service, La Junta is the only completely Mexican owned pet food manufacturer, specializing in lower-end pet food. American-owned branch plants account for the majority of pet food production in Mexico, and manufacture products largely supplemented by/with imports from the US. The dominance of the American manufacturers has kept domestic production to a minimum.

Of the US\$29 million in total petfood exports to Mexico in 1996, over 98% originated in the United States. Manufacturers from at least eight other countries exported pet food to Mexico during the same period, however, only Germany has maintained a consistent presence in the Mexican market..

### The Canadian position

Canadian pet food companies currently have a limited presence in Mexico, as American companies have effectively eliminated nearly all foreign competition in the pet food market.

In 1996, Canadian exports of pet food were valued at US\$169,000. This was a significant increase from 1992 when there were no pet food exports to Mexico. In contrast, Canada was the second largest exporter

of pet foods to Mexico in 1996, although Canadian exports of pet food still accounted for less than 1% of total Mexican pet food imports. Forecasted growth of this industry within Mexico should lead to increased opportunities for Canadian pet food exporters.

## **DISTRIBUTION CHANNELS**

### **Overview of distribution system**

#### Importers and intermediaries

Despite recent advances in retailing, Mexico is still a fragmented market with an underdeveloped distribution system. Exporters should retain the services of an agent or distributor in order to ensure national distribution. Agents and distributors will also help Canadian exporters guarantee that they abide by all necessary import regulations.

When looking for an agent/distributor consider the following:

For an Agent:

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

For a Distributor:

- Relationships with local governments;
- Relationships with buyers;
- Condition of facilities;
- Willingness and ability to keep inventory; and
- Relationships with Banks.

Under Mexican law, goods may only be imported by persons/companies listed in the Importers Registry who possess a registered taxation number (Registrio federal de Causontes (RFC), and a local address.

#### Retail distributors

Mexico's retail sector is divided into two segments: modern and traditional.

The modern sector is comprised of supermarkets (between 500 and 4500 sq m); hypermarkets (over 4500 sq m); discounters (low prices and over 2500 sq m); and convenience stores. The targeted clientele of this sector are the middle and upper income consumers. Pet food is retailed almost exclusively, in the modern sector.

Large scale retailers account for 70% of pet food sales, including both imports and domestic brands. The remainder is sold in smaller grocery stores.

### **Direct sales**

It is possible to sell directly to some larger stores in the modern sector but they must be registered in the import registry. Direct sales to smaller stores in the traditional sector is more difficult as direct sales to these stores requires Canadian companies to set up local offices.

### **Promotional considerations**

Recent promotional activity in the Mexican pet food market has been aimed at educating local consumers about the benefits of prepackaged pet food and promoting brand loyalty. Consumers perceive pet food as a non-essential commodity, making it highly price-sensitive.

Pet foods are generally packaged in the these formats: Dog food in 0.75 kg, 5 kg and 15 kg bags; and in 0.44 kg and 0.375 kg cans. Cat food is generally packaged in 0.75 kg and 0.17 kg cans.

Television is the dominant form of media in Mexico, reaching millions of households on a daily basis. The main advantages of this medium are that it reaches people of every social strata and it tends to have a significant impact on consumption decisions. Exporters should note that television is also the most expensive venue for advertising.

There are two dominant television networks in the Mexican market, Televisa, with four channels, and TV Azteca, with two channels. In addition to the aforementioned networks, there is also a public television station.

Mexican newspapers have a poor reputation for editorial independence, and tend to have relatively small readerships. The major daily papers are *Excelsior*, *Reforma*,

*El Universal*, *El Sol de Mexico*, *El Financiero* and *La Prensa*. Regional or local newspapers should also be considered if a promotional campaign is restricted to specific cities or regions.

## **CONSIDERATIONS FOR MARKET ENTRY**

### **Local standards and regulations**

Almost all Mexican regulations refer to HS codes. Pet food is covered under 2309.10.01.

#### Health and food safety

NOM-012-ZOO-1993 regulates all products for animal consumption, including food. The NOM was published in the Diario Oficial (Official Gazette) in January 17, 1995. SAGAR, the Mexican Ministry of Agriculture, is the authority responsible for implementing and enforcing this regulation.

For imported products, the importer must obtain from SAGAR an "hoja de requisitos" and check that all the sanitary and/or phytosanitary requirements established are met. At the border, SAGAR will verify that all documents mentioned in the "hoja de requisitos" are complete and valid, inspect a sample of the product, and issue a "compliance certificate" that is needed for customs procedures.

The contact for SAGAR is:

Dr. Eduardo Serrano  
Import/Export Regulations  
Recero 14, piso 12  
03230 Mexico D.F.  
Tel: (525) 524 4697 / 534 7489 / 534 8994  
Fax: (525) 534 9496

#### Packaging and labelling

According to SECOFI/DGN, labels must comply with the general labelling requirements established by NOM-050-SCFI-1994 (English translation available in HQ) and with some additional specific requirements established by NOM-012-Zoo-1993 (no English version available).

All labels must be in Spanish; additional languages can appear as long as the Spanish label is predominate; labelling must be presented in a manner that does not mislead the consumer; and must not misrepresent the nature or characteristics of the product. Labels cannot be not easily removable. Stickers can be used as long as they remain securely attached until the product reaches the consumer.

The label must contain the following information:

- product name or description;
- list of ingredients in decreasing quantitative order;
- net content in metric units;
- manufacturer's name and address;
- name and address of importer;
- country of origin;
- batch identification number;
- date of manufacture and expiration; and
- nutritional information (see Appendix A).

Note: Labels must be applied before entering Mexico.

Mexico frequently revises its labelling requirements, so Canadian exporters should consult a local agent or the Embassy to ensure that the latest standards are met.

### **Documentation and procedures**

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 accompanied with 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 several 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 content;
- 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.

### *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 it 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\$1250, although a statement of origin should be included on the invoice.

In the event that goods do not meet NAFTA rules of origin and a NAFTA certificate unattainable, the exporter should include a general certificate of origin. The General Certificate is required to avoid countervailing duties that Mexico applies to goods from specific countries. Failure to provide this document will result in the application of the countervailing duty regardless of the country of origin. The product would not meet NAFTA "rules of origin" criteria only if a company shipped goods to Canada from a third country and, in turn, re-exported the product to Mexico.

### *Authentication of documents*



Documents requiring authentication, 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. The notarized documents can then be authenticated, at no cost to the exporter, by forwarding them to:

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 pet food are to be phased out over the next six years. Currently the tariff is set at 6%, and is decreasing at a rate of 1% per year. Imports also face a 0.8% Customs Service Fee and a 15% VAT tax, which is calculated ad valorem on the c.i.f. value.

### **Transportation and storage**

The best method of shipping pet food to Mexico is by road or intermodal.

Road transportation is the most popular method of transport to Mexico, and is increasingly common. Most products take only five to ten days to reach Mexican destinations (not including customs clearance). The major drawback to road transportation is the need to transfer goods from an Canadian carrier to a domestic carrier within 20 km of crossing the Mexican border.

Intermodal transportation is also increasing in popularity, as highway trailers can be shipped by rail and sea. Most intermodal operators offer a complete transportation package on a contract basis, and will usually negotiate freight charges with rail and truck operators on behalf of the exporter. Transit time from Toronto or Montreal to the Mexican boarder can be as little as four of five days.

### **Export financing and payment**

There are four methods of financing international trade transactions with Mexico: Advance payment, Letter or 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.

The Canadian Export Development Corporation (EDC) does not have a financing program available to aid Canadian companies with exporting consumer goods to Mexico. However, they do have other financial instruments that can lower the risk of exporting. Presently, the EDC does not have any sort of "blanket" insurance policy. Instead, insurance options are handled on a case by case scenario. Additional information can be obtained directly from the EDC (see Appendix D).

### **Cultural and business practices**

Companies that conduct business in Canada and the United States tend to overlook cultural differences. These companies have become accustomed to adapting their products and marketing techniques to appeal to varying markets. 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 other cultures do business. This lack of exposure to Canadian business practices means that they may react adversely 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 the Mexican ways of doing things.

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. 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 and showing a great deal of patience, can a business achieve optimum success in the Mexican market.

## OTHER REFERENCE MATERIAL

### Print

- Canada - Export-i Mexico Exporting Guide, "Documents & Regulations for Exporting to Mexico," Minister of Supply and Services, Third Edition 1994.
- Euromonitor "Retailing in Latin America." 1996.
- Euromonitor "The Market for Package Food in Latin America," 1996.
- Exporter's Encyclopaedia, Dun & Bradstreet Inc, 1996.
- Export-i Financing Exports to Mexico, A Practical Guide for Canadian Business, Minister of Supply and Services, 1996.
- Market Survey of Mexican Importers, Distributors and Manufacturers in the Processed Food Sector, Canadian Embassy of Mexico, 1996.
- Mexico - An Introduction, Canadian Foreign Service Institute Centre for Intercultural Learning Anthology, 1997.
- World Trade Almanac, 1996.
- National Trade Data Bank, USDA Foreign Agricultural Service, Food Market Reports, *Mexico's Food Market*, 1996.

### Electronic

- Canadian Embassy in Mexico Website - <http://www.canada.org.mx/>
- Customs Guide to the Americas - <http://americas.fiu.edu/customs/mexico.htm>
- INFOMEX - <http://www.infomexmr.com>
- Mexican Regulations for Labelling of Food & Beverages, Dow Jones and Company, Inc. 1997.
- Exporti - <http://www.dfait-maeci.gc.ca/exporti>

## APPENDIX A -- STATISTICAL TABLES

### MEXICAN IMPORTS OF PET FOOD 1992-1996 (US\$ 000s) SITC CODE 08195

Country	1992	1993	1994	1995	1996
US	12 722	21 474	33 200	23 762	29 211
<b>Canada</b>	0	1	22	61	169
Argentina	0	0	0	0	39
Germany	0	46	32	26	14
Korea	0	0	0	15	8
Thailand	0	0	0	15	7
Other Countries	0	5	70	50	26
<b>World</b>	12 722	21 526	33 324	23 929	29 474

Source: *International Trade Databank*, 1997

## APPENDIX B -- TRADE SHOWS AND PROMOTIONAL VENUES

SHOW	LOCATION/ DATE	CONTACT
ANTAD	Guadalajara, Jalisco, March 13-16, 1998	Expo Guadalajara Av. Mariano Otero No. 1499 Col. Verde Valle Guadalajara, Jalisco, Mexico 44550 Tel: (52) 3 671 0055 Fax: (52) 3 671 0044 info@expoguadalajara.com

### Labelling Information

#### Additional Labelling Information

##### Ingredients:

If a product contains a compound ingredient that accounts for 25% or more of the product. The constituent ingredients of said compound need to be placed in parentheses in decreasing order beside the compound.

##### Nutritional Information:

This information is voluntary, unless a claim is made on the packaging regarding the product's nutritional properties (i.e. contains 12 essential vitamins and minerals).

When a nutritional declaration is made it must include the following:

- The energy content expressed in KJ (Kcal) per 100 grams;
- The amount of proteins, carbohydrates and fats in a 100 gram serving;
- Vitamins need to be expressed in metric units per 100 grams or in the percentage of the daily recommended allowance (RDA);
- The amount of any other nutrient about which a claim is made; and
- Any nutrient or ingredient regulated by an applicable legal code.

For further information consult NOM-086-SSA1-1994.

## APPENDIX C -- PET FOOD IMPORTERS IN MEXICO

### **WAL-MART de México, S.A. de C.V.**

Antiguo Camino a San Mateo 2  
Anexo Coamilco  
Naucalpan, Edo. De México  
Telephone: (525) 327-9311  
Facsimile: (525) 363-0080

### **Alimentos Pecuarios del Sureste, S.A.**

Sr. Guillermo Medero  
Gerente General  
Km. 335 carr. Fortín Córdoba  
Córdoba, Veracruz 94500  
Telephone: (271) 6-1313/6108  
Facsimile: (271) 6-1819

### **Consupharma S.A. de C.V.**

Lic Claudia Torelli  
Directora De Mercadotecnia  
Pico de Verapaz No. 435 - 2o. Piso  
Col. Jardines de la Montana  
Mexico, Distrito Federal 14210  
Telephone: 626-7655  
Facsimile: 679-7514

### **Técnica Mexicana de Alimentación, S.A. de C.V.**

Lic. Lila E. Piña Mojica  
Comercio Exterior  
Av. Adolfo Lopez Mateos No. 81  
Col. Santiago Tepalcapa  
Cuautitlan Izcalli, Edo. de Mexico 54769  
Telephone: 89f3-1244 al 46  
Facsimile: 893-1405/202-8236

## APPENDIX D -- KEY GOVERNMENT CONTACTS AND SUPPORT SERVICES

### Canadian government contacts

#### **Canadian Embassy**

Mailing Address  
Apartado Postal 105-05  
11580 México, DF, México  
Telephone: (011-52-5) 724-7900  
Facsimile: (011-52-5) 724-7982/7984

#### **Agriculture and Agri-Food Canada**

Sir John Carling Building  
930 Carling Avenue  
Ottawa, ON, K1A 0G2  
Contact: Grant Honeyman  
Telephone: (613) 759-7743  
E-mail: honeyman@em.agr.ca

#### **Department of Foreign Affairs and International Trade**

Mexico Division  
125 Sussex Drive  
Ottawa, ON, K1A 0C5  
Contact: Kim O'Neil  
Telephone: (613) 996-8625  
Facsimile: (613) 996-6142

#### **Export Development Corporation (EDC)**

151 O'Connor Street  
Ottawa, ON, K1P 5T9  
Telephone: (613) 598-2500  
Facsimile: (613) 598-2503

**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

**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 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  
 Toronto-Dominion Bank Tower  
 M5K 1A1  
 Telephone: (416) 867-9292, 867-9325  
 Facsimile: (416) 867-1847  
 Email:  
[cc-toronto@bancomext.gob.mx](mailto:cc-toronto@bancomext.gob.mx)  
 Email:  
[btoronto@pathcom.com](mailto:btoronto@pathcom.com)

**Bancomext Vancouver**  
 Grandville St, 1365-200  
 V6C 1S4  
 Telephone: (604) 682-3648, 844-1261  
 Facsimile: (604) 682-1355, 844-7866  
 Email:  
[cc-vancouver@bancomext.gob.mx](mailto:cc-vancouver@bancomext.gob.mx)

**Bancomext Montreal**  
 1201 Mc Gill College  
 Suite 1540  
 H3A 3M8  
 Telephone: (514) 287-0899/1699  
 Facsimile: (514) 287-1844  
 Email:  
[info@bancomext-mtl.com](mailto:info@bancomext-mtl.com)  
 Email:  
[cc-montreal@bancomext.gob.mx](mailto:cc-montreal@bancomext.gob.mx)

## 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

**Cámara Nacional de Comercio (National Chamber of Commerce)**  
 Avda Insurgentes Sur 1844, Col. Guadalupe

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

Inn. 06769 México, DF  
Telephone: (52-5) 534-5169

## Chambers of commerce and industry associations

### Control Sanitario de Bienes y Servicios

Lieja 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

### National Bank of Canada

(Representative Office)  
Lope de Vega 117, Piso 10  
Colonia Lolanco  
C.P. 11540  
Mexico D.F.  
Mexico  
Telephone: (525) 245-7030  
Facsimile: (525) 531-6930

### Toronto Dominion Bank

Torre Diana  
Avenida Paseo de la Reforma No.  
Colonia Cuauhtemoc  
Delegacion Cuathemoc  
Mexico D.F.  
Codigo Postal 06500  
Mexico

### The Bank of Nova Scotia

(Representative Office)  
Apartado Postal 6-931  
06600 Mexico, D.F.  
Mexico  
Telephone: (525) 256-0622  
Facsimile: (525) 511-1300

### Canadian Imperial Bank of Commerce

Campos Eliseos 400  
Despacho 402  
Colonia Chapultepec Polanco  
11000-Mexico, D.F.  
Mexico  
Telephone: (525) 281-1283  
Facsimile: (525) 280-3069

### Bank of Montreal

(Representative Office)  
Horacio # 1885-301  
Colonia Los Morales Polanco  
Delegacion Meguel Hidalgo  
#11510 Mexico D.F.  
Mexico  
Telephone: (525) 203-8211  
Facsimile: (525) 203-8542

### Royal Bank of Canada

(Representative Office)  
Representacion en Mexico  
Apartado Postal 6-1020  
Hamburgo 172-Piso 5  
006600 Mexico, D.F.  
Mexico  
Telephone: (525) 208-1592  
Facsimile: (525) 207-2252/2242

### 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.**

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**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:**

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

