Market Brief
The Private Label Food Market in Mexico

May 2005

FaxLink #0800025
Report prepared by:
Market Research Centre (TMR)
International Trade Canada (ITCan)
125 Sussex Dr., Ottawa, ON K1A 0G2
Fax: (613) 943-1103
E-mail: **mrc@international.gc.ca**
Trade Evaluation and Analysis Division (TEAD)
Agriculture and Agri-Food Canada (AAFC)
930 Carling Ave., Ottawa, ON K1A 0C5
Contact: Andy Archibald, Senior Economist
Tel.: (613) 759-7665
Fax: (613) 759-7505
E-mail: **archibalda@agr.gc.ca**
Reports are available from:
- ITCan's InfoExport Internet site (**www.infoexport.gc.ca**);
- AAFC's Agri-Food Trade Service (ATS) Internet site (**www.agr.gc.ca**).

Quick Facts

Market Highlights

- At present, the market penetration of private-label food products in Mexico is lower than that of any other top Latin American economy. Over the last several years, however, the rate of sales growth for private-label products has been double that of total food sales growth.

Opportunities

- Specific opportunities for Canadian private-label food manufacturers include canned foods, frozen foods, beverages and desserts.

Key Players

- The United States dominates nearly every facet of the Mexican agri-food import market. Other important competitors include Spain, France, Australia and New Zealand.

Customers

- Canadian exporters are most likely to find customers located in Mexico City, Guadalajara and Monterrey. Furthermore, those companies looking to offer goods for private-label use should target national retailers.

Market-Entry Considerations

- Mexican importers of foreign foodstuffs are responsible for obtaining all necessary permits in order to complete the sale. That said, Canadian companies will still need to work closely with the importer to facilitate the process. Canadian companies are well-advised to enlist the services of an experienced customs broker.

MARKET OVERVIEW

- As a signatory to the North American Free Trade Agreement, Mexico is a key destination for Canadian exports. In 2003, Canadian exports to Mexico exceeded $5.8 billion, including $1 billion in agri-food products. Canadian access to the Mexican market is constantly improving under the terms and conditions of the North American Free Trade Agreement (NAFTA).
- After a weak performance from 2001 to 2003, Mexico's gross domestic product (GDP) grew 4.1% in 2004. The strength of the Mexican economy is largely reliant on U.S. demand for Mexican imports, and it was therefore susceptible to the economic downturn experienced by the United States beginning in 2001. As the American economy picked up in 2004 so, too, did the demand for Mexican products.

General Agri-Food Information

- In many ways, the Mexican agri-food market mirrors Canada's, but there are a number of fundamental differences. These differences include the size variation of the major players, the number of participants and the prevailing popularity of traditional Mexican flavours in a wide range of products, from condiments to salted snack foods. Many standard North American products can be easily adapted for the Mexican palette by including local ingredients, usually hot peppers.
- According to official statistics from the Mexican government, the average Mexican household spends 30.7% of their annual income on food purchases. The percentage increases to 55% for the poorest segment of the economy and falls to 15% for the richest.
- Excluding independently owned corner shops, Mexico is home to more than 4250 retail stores selling food and beverage products. In 2002, the retail market expanded by 6% in terms of sales over the previous year. Retail space expanded by 9% in 2003.
- Increasing per-capita income levels are contributing to positive economic growth in most aspects of the Mexican economy. Furthermore, rising levels of wealth mean a growing audience for imported foods. In 2003, approximately 20% of the country (20 million people) had enough purchasing power to buy foreign goods.
- Health foods and convenience foods are currently selling well in Mexico. Specifically, low-fat products such as yoghurt.

- As more and more women enter the work force in Mexico, there has been an increase in the demand for ready-made and convenience foods. These trends will continue for the next several years and will present opportunities for private label product manufacturers as well as suppliers of ingredients to the private label food industry in Mexico.

Private Label

- At present, the market penetration of private-label food products in Mexico is lower than that of any other top Latin American economy. Over the last several years, however, the rate of sales growth for private-label products has been double that of total food sales growth. The emergence of Wal-Mart as a dominating force in the Mexican retail food segment has helped drive awareness and consumer acceptance of private-label foods. As a result, the majority of leading supermarket chains in Mexico have now introduced their own brands of private-label food products, including beverages, to compete with Wal-Mart.
- Worldwide, private-label foods are making significant inroads. In the United Kingdom, nearly 40% of all food sales in supermarkets are private-label and the products covered are no longer seen as being of inferior quality to brand name products. In fact, several U.K. retailers, including Tesco and Sainsbury's, have succeeded in creating a well-respected image for their private-label foods. Private-label growth is expected to continue in other markets, with the United States reaching the same level of saturation as the United Kingdom by 2014.
- Mexican retailers of private-label products have made strides in maintaining and growing private-label sales by improving the quality and perceptions of their own- brands, whilst keeping prices significantly lower than branded products. As a result, private-label products are beginning to sell to a much wider target audience, using consistent quality and lower prices to undercut brand loyalty.
- Many retailers are now looking for different levels of sophistication in their private-label offerings. Wal-Mart, for example, offers two separate types of products: Great Value, aimed at the low-cost customer; and Sam's Choice, a "premium" brand aimed at the more quality-conscious customer.

OPPORTUNITIES

- Given the rapid growth of private-label foods in other countries, including the United States and Canada, Canadian suppliers should see excellent opportunities in Mexico during the near term. Private-label goods have yet to reach the same high levels of penetration in the Mexican market as seen elsewhere in Latin America. However, recent changes in the retail market will likely increase private-label prominence over the course of the next several years.
- Specific opportunities for Canadian private-label food manufacturers include canned foods, frozen foods, beverages and desserts.
- Most of the major Mexican retailers are likely open to the possibility of marketing a store brand if they are not already doing so. As such, Canadian exporters looking to avoid the complications of marketing and establishing a national brand image may find significant opportunities in the Mexican market.

KEY PLAYERS

- In 2004, Mexico imported over $18.2 billion in agri-food products, a 10.2% increase over 2003. The United States supplied over 68% of Mexican agri-food imports that year, down from 74% in 2003. In 2004, Canadian agri-food exports to Mexico reached an historic high of $1.9 billion, a 58% increase over 2003 totals. Canada's market share also increased substantially, rising from 5.9% in 2003 to 8.4% in 2004. The most significant and impressive category of growth for Canadian exporters was in consumer ready food products.

- Other important competitors in the Mexican market include Spain, France, Australia and New Zealand. Europe's contribution to the Mexican import market is growing as a result of the Mexico-European Union Free Trade Agreement signed in 2000.
- The Mexican canned food market is dominated by La Costena, Sabormex and Herdez, which together control 70% of the domestic market.
- In terms of beverages, the majority of leading supermarket chains in Mexico have now introduced their own brands of private-label products. The largest player in the private label soft drink market in Mexico is Canada's Cott Beverages. Cott produces private label soft drinks for all major supermarkets in the country.

CUSTOMERS

- The retail segment, especially the supermarket format, offers the best opportunities for Canadian suppliers of private-label products although some companies may also find demand in convenience store chains. Smaller format stores, however, do not have centralized distribution systems and are therefore unsuitable as customers for foreign private-label products.
- In 2004, the Mexican supermarket segment was dominated by Wal-Mart (Walmex) and Comercial Mexicana, followed by a number of smaller retailers, as shown in Table 1.

Table 1. Market Share of the Mexican Supermarket Segment, 2004

Supermarket Chain	**Market Share (%)**	**Country of Origin**
Wal-Mart (Walmex)	34	United States
Comercial Mexicana	22	Mexico
Grupo Gigante	13	Mexico
Soriana	10	Mexico
Carrefour	8	France
Coppel	7	Mexico
HEB	2	United States
Other	4	Not applicable
Total	100	

Source: Hanhausen & Doménech Consultores, S.C. Mexico Food Processing and Ingredient Study, April 2004

- Aside from supermarket retailers, Canadian companies may also find opportunities with the convenience store format. However, convenience stores usually carry a much smaller selection of products, focussing on one or two different brands, meaning that sales prospects for private-label goods are limited. Some of the largest convenience store chains are associated directly with major food and beverage manufacturers and will thus refuse to sell competing products in their stores.
- Rising per-capita incomes are increasing the number of Mexican consumers who are able to purchase imported foodstuffs. Greater spending power in the middle income bracket is leading to a dramatic rise in demand for imported foods.
- Mexico's domestic agri-food industry is disorganized, making it difficult for producers to get fair prices for products from distributers, wholesalers and end users. On average, only 30% of the price paid by consumers goes to the producer, meaning Mexican companies are unable to generate profits large enough to support internal infrastructure improvements and expansion.

- Many supermarkets are beginning to centralize purchasing operations in order to match the efficiency levels exhibited by Wal-Mart. Sinergia, a joint venture formed by Organizacion Soriana, Grupo Gigante and Comercial Mexicana, is an attempt to create the same centralized purchasing mechanisms that have allowed Wal-Mart to gain control of the Mexican supermarket segment.
- Pricing is the most important factor influencing purchase decisions for the major retailers. In order to remain competitive with Wal-Mart, the other national retailers will seek to undercut Wal-Mart's prices while still remaining profitable.
- Canadian exporters are most likely to find customers located in Mexico City, Guadalajara and Monterrey. Furthermore, those companies looking to offer goods for private-label use should target national retailers.
- Discount supermarkets have the fastest-growing share of the overall retail market. Of the discount supermarkets, Wal-Mart and Soriana do most of their purchasing directly. Casa Ley, Comercial Mexicana and Gigante purchase directly while also working with local distributors.
- The largest convenience store retailer, Cadena Comercial OXXO, purchases through importers and wholesalers. 7-Eleven, the second-largest chain, purchases directly from manufacturers. Comextra, the smallest of the chains, works with importers.
- Canadian companies without an industrial capacity in Mexico are advised to enlist the services of a local distributor when attempting to sell products to Mexican supermarkets. This practice, however, is changing as supermarkets move to follow the example of Wal-Mart by centralizing the purchasing function within the retailer itself. Once Mexican supermarket chains establish the necessary internal infrastructure for central distribution, they will begin purchasing products directly from the manufacturer rather than through an intermediary.
- It is recommended that Canadian exporters obtain the services of an import agent. An agent will remain in regular contact with government authorities (e.g. regarding customs or required certificates) and buyers in order to avoid problems in the import process. An agent must be listed in the Sistema de Información Empresarial Mexicano (SIEM [National Register of Importers and Exporters]) and must be a Mexican citizen or represent a local corporation. SIEM has a Web directory of over 600 000 industrial, commercial and service businesses available at **www.siem.gob.mx** (in Spanish).

Suggested business practices

- Personal relationships are vital for successful business relationships in Mexico. While Mexican businesses are very conscious of the bottom line, courtesy and diplomacy are extremely important to successful business ventures. It is important to begin conversations with questions about a person's well-being and that of their family before launching into the details of a business proposal.
- Personal visits are important. Some Mexican importers may not respond to phone calls, faxes or e-mails, preferring face-to-face meetings to discuss business. If a Mexican client comes to visit a Canadian supplier, the supplier is expected to take the time to entertain them with dinner and drinks; Canadians will receive the same treatment when they visit Mexico.
- The conduct of business in Mexico tends to be more formal than in other parts of North America. Business meetings should be scheduled at least two weeks in advance. Canadians should carry plenty of business cards printed in both English and Spanish. Business discussions over lengthy lunch meetings are common. Punctual and quick meetings are not the norm. Since meetings can be frequently cancelled, it is advisable for individuals to confirm all appointments close to the meeting time.
- Spanish is the official language in Mexico. Even though most international managers have a strong base in English, it is advisable to have Spanish translation assistance during business meetings. This will ensure effective

communication and prevent misunderstandings. In addition, product literature should be available in Spanish.
- Sales to Mexican companies involve contracts and conditions similar to those in Canada. Nevertheless, before hiring a representative or agent, it is important for companies to investigate the legal implications of working with a local partner. Contracts may be written in English and should always be reviewed by Canadian and Mexican lawyers before signing.
- Collaborating with provincial and industry associations and participating in trade shows and missions are excellent ways to make contacts, understand import procedures and develop effective entry strategies. Promotional activities in co-operation with Mexican retailers are another way to gain exposure and better understand this extremely competitive market.

MARKET-ENTRY CONSIDERATIONS

Import Regulations

- Mexican importers of foreign foodstuffs are responsible for obtaining all necessary permits in order to complete the sale. That said, Canadian companies will still need to work closely with the importer to facilitate the process. Canadian companies are well-advised to enlist the services of an experienced customs broker.
- Exporters should be aware of the various import regulations relevant to their products. Mexico's Secretaría de Economía (SE [Secretariat of the Economy]) regulates all general policies for international trade negotiations, including import and export requirements.
- The Secretaría de Salud (SSA [Ministry of Health]) is responsible for setting sanitary regulations regarding the importation of processed food and beverages. Importers of these types of products must be registered by the Ministry; thus, Canadian exporters should confirm that their importers are SSA-registered.
- Canadian exporters should ensure that their products comply with the Normas Oficiales Mexicanas [Mexican Official Standards] (NOMs), which establish the sanitary specifications of food products destined for human consumption.
- Mexican food companies typically only use food additives that have been approved by the United States Food and Drug Administration. The Mexican market does not make a good testing ground for new additives or food ingredient types, with the exception of ingredients already internationally recognized and approved for human consumption.

Duties

- Under the provisions of the NAFTA, nearly all Canadian agri-food products enjoy duty free access to the Mexican marketplace. The only remaining exceptions are maize and beans, which are subject to tariff rate quotas until January 1, 2008. In addition, poultry, eggs, dairy and sugar were excluded from the NAFTA and are therefore subject to Mexico's tariff rates for World Trade Organization member countries.

Documentation

- The documents required for exporting to Mexico can vary with the method of shipment: boat, train, truck or mail. For statistical purposes, Canada requires exporters to complete an Export Declaration (Form B13A), information about which is available electronically at www.statcan.ca/english/exports/overview.htm.

- The basic documents required by Mexican customs authorities include: an import declaration (pedimento de importación), a commercial invoice, a bill of lading, a packing list, a certificate of origin and a sanitary import notice.
- If the product(s) will be travelling through the United States, exporters must also obtain a transportation and exportation bond.
- As a general rule, all documents, receipts and invoices should be addressed to the importer, complete with the importer's tax identification number referred to as the Registro Federal de Contribuyentes (RFC).
- Mexican customs law is extremely strict. Exporters are encouraged to contact Canada's Border Clearance Representative (BCR) for assistance and are advised to employ competent Mexican importers or custom brokers to prepare documents. The BCR is stationed full time at Nuevo Laredo, Mexico, the second-busiest international border crossing in the Americas. The BCR is available to consult with companies prior to shipping to ensure all paperwork is in order and will be on-site to troubleshoot if a shipment is held up at the border.
- Labels must be in Spanish as indicated in NOM-051-SCFI-1995, the main source of rules governing label requirements for pre-packaged food and beverages. If other languages are also used, the Spanish lettering must be at least the same size font and typographic proportions. A comma must be used as a decimal point when defining quantity on packages, as required by NOM-008-SCFI-1993. Imported products using a period as a decimal point are likely to be rejected by Mexican officials. In addition, all measurements must be in metric. Label costs are almost always the responsibility of the exporter.
- Canadian exporters can send sample labels to an authorized verification unit. Most verification units provide comprehensive services including the verification, revision and printing of approved labels.
- All labels must include the following information:

    product name;
    list of ingredients;
    net contents and drained bulk;
    name and tax address of both the exporter and importer;
    country of origin;
    lot number;
    expiry dates; and
    any special storage requirement(s)
    brand name
    product description
    nutritional information

Local Certificates

- Different product types require different certificates to enter Mexico. For an animal product, the importer must pay for a hoja de requisitos zoosanitarios (HRZ [a form listing zoo-sanitary requirements applicable to the product in question]).Similarly, when exporting plant products, the importer must first obtain the phytosanitary requirements from SAGARPA and pass them along to the Canadian supplier. The supplier must use these requirements to obtain an appropriate phytosanitary certificate from the CFIA.
- For processed food and beverage products, the regulating body is the Mexican Ministry of Health. Prior to exporting these products, it is the importer's responsibility to apply for the appropriate documentation.

Financing

- Four main methods of financing exist in Mexico: advance payment, letter/line of credit, bill of exchange, and open account trading. Letters of credit, which carry the lowest risk, are typically used when dealing with foreign suppliers; however, some Mexican distributors prefer to work with suppliers that provide extended credit of 90 days rather than paying through the usual letter of credit. Imports are usually financed through 60-90 day lines of credit, but also through cash-in-advance for smaller and less-frequent importers.

KEY CONTACTS AND SUPPORT SERVICES

Canadian Government Contacts

Canadian Embassy in Mexico
Calle Schiller No. 529
Rincon del Bosque, Colonia Polanco
11560 Mexico, DF Mexico
Contact: Marcello DiFranco, Trade Commissioner
Tel.: (52 55) 5724-7934
Fax: (52 55) 5724 7982
E-mail: **marcello.difranco@international.gc.ca**
Internet: **www.canada.org.mx**
Contact: Adriana Carrillo, Trade System Specialist
Tel.: (52-55) 5387-9314
Fax: (52-55) 5724-7982
E-mail: **adriana.carrillo@international.gc.ca**
Internet: **www.canada.org.mx**
Contact: Adriana Vega, Trade Commissioner Assistant
Tel.: (52-55) 5724-7938
Fax: (52-55) 5724-7982
E-mail: **adriana.vega@international.gc.ca**
Consulate of Canada in Guadalajara
Hotel Fiesta Americana, Local 31
Aurelio Aceves No. 225
Col. Vallarta Poniente
44100 Guadalajara, JL Mexico
Contact: Juan-Carlos Munoz, Commercial Officer
Tel.: (52-33) 3615-6215, -6266 or -6270
Fax: (52-33) 3615-8665
E-mail: **juan-carlos.munoz@international.gc.ca**
Consulate of Canada in Monterrey
Zaragoza 1300 Sur y Constitucion
Edificio Kalos, Piso C-1, Suite 108-A
06400 Monterrey, NL Mexico
Contact: Jean-Charles Joly, Trade Commissioner
Tel.: (52-81) 8344-3200 or -2753
Fax: (52-81) 8344-3048
E-mail: **jeancharles.joly@international.gc.ca**
Agriculture and Agri-Food Canada (AAFC)
930 Carling Ave.
Ottawa, ON K1A 0C5
Contact: Richard Clegg, Senior International Market Development Officer, Mexico
Tel.: (613) 759-7743
Fax: (613) 759-7506
E-mail: **cleggr@agr.gc.ca**
Internet: **www.agr.gc.ca**
Border Clearance Representative (BCR)
Nuevo Laredo, Mexico
Contact: Luis A. Pérez
Tel.: (52-867) 719-00-03
Cell: (956) 206-8771
Fax: (52-867) 719-07-64
E-mail: **luispere@prodigy.net.mx**

Business Development Bank of Canada (BDC)
5 Ville Marie Place, Suite 400
Montreal, QC H3B 2G2
Tel.: (877) 232-2269 or (514) 496-7966
Fax: (514) 283-0617
Internet: **www.bdc.ca**
Canadian Commercial Corporation (CCC)
50 O'Connor St., 11th Floor
Ottawa, ON K1A 0S6
Tel.: (800) 748-8191 or (613) 996-0034
Fax: (613) 995-2121
E-mail: **info@ccc.ca**
Internet: **www.ccc.ca**
Canadian Food Inspection Agency (CFIA)
59 Camelot Dr.
Nepean, ON K1A 0Y9
Tel.: (613) 225-2342
Fax: (613) 228-6653
E-mail: **cfiamaster@inspection.gc.ca**
Internet: **www.inspection.gc.ca**
Export Development Corporation (EDC)
151 O'Connor St.
Ottawa, ON K1A 1K3
Tel.: (613) 598-2500
Fax: (613) 237-2690
E-mail: **export@edc4.edc.ca**
Internet: **www.edc.ca**
EDC in Mexico
Calle Schiller 529
Rincon del Bosque, Colonia Polanco
11560 Mexico, DF Mexico
Contact: Doug Fourtney, Regional Director: Mexico and Central America
Tel.: (52-55) 5387-9316
Fax: (52-55) 5387-9317
E-mail: **douglas.fourtney@international.gc.ca**
Health Canada (HC)
International Affairs Directorate
Brooke Claxton Building, Room 814A
Postal Locator 0908A, Tunney's Pasture
Ottawa, ON K1A 0K9
Tel.: (613) 941-3136
Fax: (613) 952-7414
Internet: **www.hc-sc.gc.ca**
International Trade Canada (ITCan)
125 Sussex Dr.
Ottawa, ON K1A 0G2
Internet: **www.itcan-cican.gc.ca**
Market Research Centre (TMR)
Contact: Sean McLean, Trade Commissioner and Senior Market Analyst
Tel.: (613) 996-0688
Fax: (613) 943-1103
E-mail: **sean.mclean@international.gc.ca**
Internet: **www.infoexport.gc.ca**
Market Support Division (TMM)
Contact: Clément Côté, Trade Commissioner
Tel.: (800) 267-8376 or (613) 995-1773
Fax: (613) 944-0050
E-mail: **clement.cote@international.gc.ca**
Mexico Division (NMX)
Contact: Vance McEvoy, Trade Commissioner

Tel.: (613) 944-7103
Fax: (613) 996-6142
E-mail: **vance.mcevoy@international.gc.ca**

Agriculture and Agri-Food Canada--Regional Trade Contacts, Mexico

Derek Banfield
St. John's, NL
Tel.: (709) 772-5907
E-mail: **banfieldd@agr.gc.ca**
Valerie Bruce
Charlottetown, PEI
Tel.: (902) 566-7303
E-mail: **brucev@agr.gc.ca**
Heather Gregory
Winnipeg, MB
Tel.: (204) 984-6204
E-mail: **gregoryh@agr.gc.ca**
Jeffrey Lang
Vancouver, BC
Tel.: (604) 666-1066
E-mail: **langjd@agr.gc.ca**
Shelley Manning
Halifax, NS
Tel.: (902) 896-0098
E-mail: **mannings@agr.gc.ca**
Robert Bouchard
Montreal, QC.
Tel.: (514) 283-3815 ext. 561
E-mail: **bouchardr@agr.gc.ca**
George Adnam
Regina, SK
Tel.: (306) 780-5589
E-mail: **adnamg@agr.gc.ca**
Hector Urbina
Winnipeg, MB
Tel.: (204) 983-3835
E-mail: **urbinah@agr.gc.ca**
Bernard Mallet
Moncton, NB
Tel.: (506) 452-3706
E-mail: **malletb@agr.gc.ca**
Bill Robinson
Guelph, ON
Tel: (519) 837-5822
E-mail: **robinsonb@agr.gc.ca**
Adele M. Deschamps
Edmonton, AB
Tel.: (780) 495-5527
E-mail: **deschampsad@agr.gc.ca**

Canadian Industry Associations

Canadian Association of Importers and Exporters
438 University Ave., Suite 1618
Toronto, ON M5G 2K8
Tel.: (416) 595-5333

Fax: (416) 595-8226
E-mail: **info@caie.ca**
Internet: **www.importers.ca**
Canadian Food Exporters Association (CFEA)
885 Don Mills Rd., Suite 301
Don Mills, ON M3C 1V9
Tel.: (888) 227-8848 or (416) 445-3747
Fax: (416) 510-8044
E-mail: **info@cfea.com**
Internet: **www.cfea.com**
Canadian Manufacturers and Exporters Association (CME)
1 Nicholas St., Suite 1500
Ottawa, ON K1N 7B7
Tel.: (613) 238-8888
Fax: (613) 563-9218
Internet: **www.cme-mec.ca**
Food and Consumer Products of Canada (FCPC)
885 Don Mills Rd., Suite 301
Toronto, ON M3C 1V9
Tel.: (416) 510-8024
Fax: (416) 510-8043
E-mail: **info@fcpmc.com**
Internet: **www.fcpmc.com**

Mexican Government Contacts

Embassy of Mexico in Canada
45 O'Connor St., Suite 1500
Ottawa, ON K1P 1A4
Tel.: (613) 233-8988
Fax: (613) 235-9123
E-mail: **info@embamexcan.com**
Internet: **www.embamexcan.com**
Consulate General of Mexico-Montreal
2055 Peel St., Suite 1000
Montreal, PQ H3A 1V4
Tel.: (514) 288-2502 or -2707
Fax: (514) 288-8287
Internet: **www.consulmex.qc.ca**
Consulate General of Mexico-Vancouver
810, 1130 W Pender St.
Vancouver, BC V6E 4A4
Tel.: (604) 684-3547, -1859 or 683-0674
Fax: (604) 684-2485
E-mail: **mexico@consulmexvan.com**
Internet: **www.sre.gob.mx/vancouver**
Directorate General of Customs (Direccion General de Aduanas)
Av. Hidalgo No. 77
Modulo 04, 1-3 Piso
Colonia Guerrero
CP 06300, Mexico, DF, Mexico
Tel.: (52-55) 5228-3436
Fax: (52-55) 5228-3440
Directorate General of Foreign Trade Services (Direcion General de Servicios del Comercio Exterior)
Insurgentes Sur No. 1940
P.H. Colonia Florida
CP 01030, Mexico, DF, Mexico

Tel.: (52-55) 5226-6188
Fax: (52-55) 5229-6529
Ministry of Agriculture, Livestock, Rural Development, Fisheries and Food (Secretaría de Agricultura, Ganadería y Desarrollo Rural, Pesca y Alimentacion [SAGARPA])
Municipio Libre 377, Colonia Santa Cruz
CP 03310 Mexico
Tel.: (52-55) 9183-1000
E-mail: **contacto@sagarpa.gob.mx**
Internet: **www.sagarpa.gob.mx** (In Spanish)
Ministry of Foreign Affairs (Secretaría de Relaciones Exteriores [SRE])
2 Ricardo Flores Magon Ave.
Colonia Tlaltelolco
CP 06995, Mexico, DF, Mexico
Tel.: (52-55) 5782-4144
Fax: (52-55) 5327-3025
Internet: **www.sre.gob.mx** (In Spanish)
Ministry of Health (Secretaría de Salud [SSA])
Unidad de Atención al Público
Donceles No. 39
P.B. Colonia Centro
CP 06010 Mexico, DF, Mexico
Tel.: (52-55) 5510-1075
Internet: **www.salud.gob.mx** (In Spanish)
Note: Open Monday to Friday, 9:00-13:00
National Register of Importers and Exporters (Sistema de Información Empresarial Mexicano)
Tel.: (01-800) 410-2000
Fax: (52-55) 5229-6134
Internet: **www.siem.gob.mx/portalsiem** (In Spanish)

Mexican Industry Association Contacts

Asociacion de Importadores y Representantes de Alimentos y Bebidas, A.C. (AIRABAC [Association of Importers and Representatives of Food Products and Beverages])
Tuxpan 41-202
06760 Mexico, DF Mexico
Tel.: (52-55) 5584-2609 or 5564-2770
Fax: (52-55) 5564-5341 or 5606-9724
Asociación Nacional de Importadores y Exportadores de la República Mexicana (ANIERM [Association of Importers and Exporters of the Republic of Mexico])
Av. Monterrey No. 130
Col. Roma
06700 Mexico, DF Mexico
Tel.: (52-55) 5584-9522
Fax: (52-55) 5584-5317
Internet: **www.anierm.org.mx** (In Spanish)
Asociación Nacional de Tiendas de Autoservicio y Departamentales (ANTAD)
[National Retailers Association of Mexico])
Horacio 1855, Piso 6
Col. Chapultepec Morales
CP 11570 Mexico, DF Mexico
Tel.: (52-55) 5580-1772
Fax: (52-55) 5395-2610
Internet: **www.antad.org.mx** (In Spanish)
Cámara Nacional de la Industria de la Transformación (Canacintra [National Chamber of Manufacturing Industries])

San Antonio 256, Col. Ampliación Nápoles
03849 Mexico, DF Mexico
Tel.: (52-55) 5563-3400
Fax: (52-55) 5598-9467
Internet: **www.canacintra.org.mx**

Print

Hanhausen & Doménech Consultores, S.C. Mexico Food Processing and Ingredient Study. April 2004.

Electronic

Agriculture and Agri-food Canada. "Frozen Food: Market Brief Mexico, 2003." June 2003. Accessed from **ats.agr.ca/info/mkinfo-e.htm** on September 6, 2004.
The Boston Consulting Group. "Private Label: Threat to Manufacturers, Opportunity for Retailers." June 15, 2003. Accessed from **www.bcg.com/publications/files/PrivLabel.pdf** on August 30, 2004.
Datamonitor. "Wal-Mart: Private Labels on Parade." February 21, 2003. Accessed from **www.just-food.com** on September 6, 2004.
Economist Intelligence Unit Limited. Business Latin America. "Targeting Asian Supermarkets." 2003. Accessed from **db.eiu.com** on September 6, 2004.
---. Business Latin America. "Mexico: Trading Places." December 1, 2003. Accessed from **db.eiu.com** on September 6, 2004.
---. Business Latin America. "Business Outlook: South America and Mexico.' July 26, 2004. Accessed from **db.eiu.com** on September 6, 2004.
---. Business Latin America. "Consumer Goods and Retailing: Mexico." August 23, 2004. Accessed from **db.eiu.com** on September 6, 2004.
Gonzalez, Oscar. InfoAmericas. "The Latino Way for Frozen Foods." March 27, 2003. Accessed from **tendencias.infoamericas.com/article_archive/2003/039/039_industry_analysis.htm** on September 10, 2004.
Hernandez, Carlos. M&M Planet Retail. "Top 30 Grocery Retailers in Latin America, 2003." July 22, 2004. Accessed from **www.planetretail.net/Home/PressReleases/PressRelease.asp?PRID=20375** on September 14, 2004.
InfoAmericas. Tendencias. "The Mexican Packaging Market." June 2001. Accessed from **tendencias.infoamericas.com/article_archive/2001/0601/0601_industry_analysis.pdf** on September 7, 2004.
Just-Drinks.com. "Mexico: Cott Moves into Mexico." June 24, 2002. Accessed from **www.just-drinks.com** on September 7, 2004.
Lyford, Conrad and Jaime Malaga. "Trade Agreements and U.S. Agribusiness: Lessons from Mexican Retailing after NAFTA." 2002. Accessed from **cnas.tamu.edu/publications/powerpoint/malga1trade.ppt** on September 15, 2004.
Luhnow, David and Chad Terhune. Resource Center of the Americas. "Low-Budget Peruvian Cola Gives Pepsi, Coke a Kick." October 27, 2003. Accessed from **https://www.americas.org/item_460** on September 26, 2004.
Malkin, Elisabeth. New York Times. "Mexican Retailers Unite Against Wal-Mart." July 9, 2004. Accessed from **www.globalexchange.org/campaigns/sweatshops/2269.html** on September 9, 2004.
Pierce, John J. Private Label Magazine. "Exotic Tastes, Wide Appeal." November 2003. Accessed from **www.privatelabelmag.com** on September 6, 2004.
Price, John. InfoAmericas. Tendencias. "Can Mexico Outgrow its Maquiladora Past? A Special Report on Mexican Foreign Direct Investment." March 6, 2003. Accessed from **tendencias.infoamericas.com/article_archive/2003/038/038_regional_trends.pdf** on September 5, 2004.
Sosland, Mayer. Milling and Baking News. "Private Label Power." February 4, 2003. Accessed from **www.bakingbusiness.com/co_article.asp?ArticleID=60246** on September 8, 2004.
United States. Department of Agriculture. Foreign Agricultural Service. "Mexico: Agricultural Situation-A Profile of Mexico's Agricultural Sector, 2003." May 29, 2003. Accessed from **www.fas.usda.gov** on September 9, 2004.
---. "Mexico: Product Brief, 2003." June 18, 2003. Accessed from **www.fas.usda.gov** on September 9, 2004.

---. "Mexico: Product Brief-Frozen Foods Market Brief, 2003." June 18, 2003. Accessed from **www.fas.usda.gov** on September 9, 2004.
---. "Mexico: HRI Food Service Sector Report, 2003." August 29, 2003. Accessed from **www.fas.usda.gov** on September 9, 2004.
---. "Mexico: Retail Food Sector Report, 2003." September 3, 2003. Accessed from **www.fas.usda.gov** on September 9, 2004.
---. "Mexico: Exporter Guide Annual, 2003." September 29, 2003. Accessed from **www.fas.usda.gov** on September 9, 2004.
United States. Central Intelligence Agency. The World Factbook. "Mexico." September 14, 2004. Accessed from **www.cia.gov/cia/publications/factbook/geos/mx.html** on September 19, 2004.
World Trade Atlas. "Canada: Exports-Total to Mexico." September 2004.
---. "Mexico: Imports-Total from World," September 2004.
Export Development Canada (EDC): **www.edc.ca**
ExportSource: **exportsource.ca**
Foreign Affairs Canada (FAC): **www.fac-aec.gc.ca**
Food and Agricultural Organization (FAO) of the United Nations: **www.fao.org**
International Business Opportunities Centre (IBOC): **www.e-leads.ca**
International Trade Canada (ITCan): **www.itcan-cican.gc.ca**
LatinTrade.com: **www.latintrade.com**
Mexican Commercial Controller: **www.comerci.com.mx** (In Spanish)
Mexico Data Online: **www.mexicodataonline.com**
NAFTA Office of Mexico in Canada: **www.nafta-mexico.org**
InfoExport: **www.infoexport.gc.ca**
Strategis: **strategis.gc.ca**
