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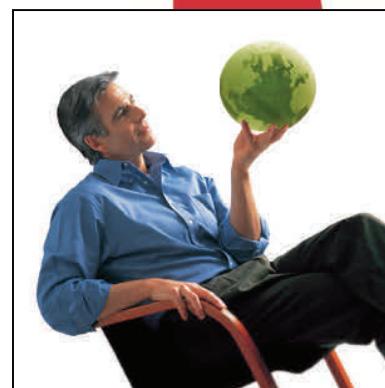
**International
Markets
Bureau**

MARKET INDICATOR REPORT | JULY 2012

Consumer Trends Pork Products in Mexico



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► **EXECUTIVE SUMMARY**

The global meat industry has been confronted with many challenging issues, and consumers see food safety as a prime concern. Mexican meat consumers are no different.

Meat is the largest food category in Mexico, accounting for approximately 25% of total grocery spending. Pork is the second-most popular meat consumed, second only to poultry. In 2010, Mexico imported 786.2 million kilograms (kg) of pork and pork products, at a value of US\$1.42 billion. Mexican consumers prefer their pork chilled and processed, with the most popular product being hot dogs, followed closely by ham.

In 2010, Mexico's pork production market size was 1.17 million tonnes carcass weight and was valued at US\$2.92 billion, while hog production totalled 16 million head, valued at US\$2.5 billion.

The United States and Mexico resolved their longstanding, long-haul trucking dispute in July 2011. As part of the agreement, the 5% tariff duty on American pork going into Mexico was reduced to 2.5%. As a result, expect to see an increase in the volume of U.S. pork product exports destined for the Mexican market place.

While Canada is facing stiff competition from the U.S. and Spain in pork and pork product exports to Mexico, there has been consistent positive growth in unit pricing.

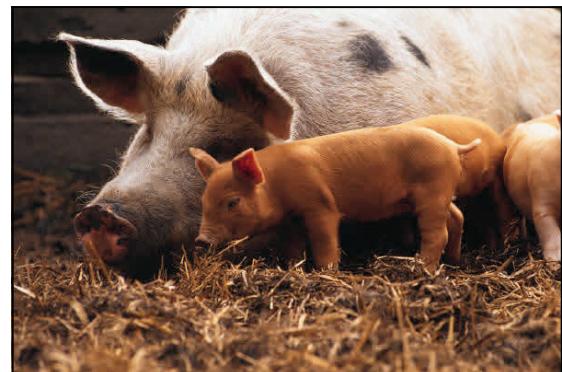
Please note that this report focuses on the processed meat sector in Mexico. For the purposes of this report, the term "chilled processed meat" refers to packaged processed meat sold in self-service shelves of retail outlets, excluding unpackaged chilled processed meat sold over-the-counter.*

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In 2010, unit prices of Canadian cured pork exported to Mexico increased 175% over 2009 figures.

*For a full definition, please consult "Product Definitions" on page 13.





► CONSUMER TRENDS

- ▶ Mexican women purchase the majority of household groceries, and they tend to focus on price, value and convenience.
- ▶ Middle- and lower-income Mexican families traded down to cheaper brands and private label brands, and purchased only the most necessary items in 2010.
- ▶ Many Mexicans altered their buying patterns, purchasing packaged foods every one to two days to better manage their budgets.
- ▶ Despite the Mexican Government's push toward fresh food consumption, packaged and industrialized food products experienced higher growth than fresh food. Mexican consumers are favouring packaged food as opposed to fresh food, because it saves them time, money and is widely available across the country. This preference is blamed for high levels of obesity in Mexico, due to the high sugar and fat content often found in these foods.
- ▶ Many Mexican food consumers have a negative opinion of genetically modified food, but little knowledge of the actual effects of consuming these products.
- ▶ Chilled and processed meat (other than beef) is often used by Mexican consumers to complement a main dish or consumed as hot dogs (largest portion of the total volume of chilled meat at 53%) and sandwiches. It is also consumed as a snack. The popularity of hot dogs in Mexico is mostly related to their low price at US\$3.61 to US\$4.01 per package, depending on the brand.
- ▶ Due to its versatility, ham is a popular meat product. Ham is most often eaten in the Mexican-style sandwich called a *torta* and as a complement to other dishes. Ham has a 32% share of the chilled meat market, and is more expensive than hot dogs, costing US\$6.41 per kilogram. More costly, finer cuts of ham are also available in the Mexican marketplace.
- ▶ Combined, hot dogs and ham account for approximately 85% of the total value sales of the chilled processed meat market. Bacon has a 7% share, chorizo (Mexican-style sausage) has just over 4%, and mortadella and others have less than 1%.
- ▶ There is little demand for canned and preserved meat, which represents a small market niche comprised of pâtés and canned sausages.
- ▶ The frozen processed meat market in Mexico is dominated by red meat.

► RETAIL MARKET

- ▶ According to the United States Department of Agriculture (USDA), store-based retailing in Mexico reached US\$178.39 billion in 2010. Of that total, grocery discounters' sales equalled US\$19.53 billion, hypermarkets' sales reached US\$16.67 billion, convenience stores' sales were US\$5.6 billion, followed by supermarkets with US\$9.28 billion. Warehouse clubs enjoyed US\$7.85 billion in sales.
- ▶ The value breakdown of Mexico's distribution channels for meat, fish and poultry shows independent retailers had the highest share in 2009 with 45.4%, supermarkets/hypermarkets, convenience stores, and specialist retailers garnered 38.9%, 6.5%, and 5.9% respectively.



► RETAIL MARKET (continued)

- ▶ In 2010, the most popular retail format from which to purchase chilled processed food was grocery retailers, of which supermarkets/hypermarkets and small grocery retailers had the majority of sales share. Frozen meat was similar in that supermarkets/hypermarkets were the most popular channels for these purchases, followed closely by independent retailers.
- ▶ The top grocery retail chains in Mexico are Walmart, Hipermercado Soriana, and Chedraui.
- ▶ In response to consumer demand for private label, larger grocery retailers have increased the private label lines they offer.
- ▶ Soriana stores have started offering customer loyalty cards, allowing customers to accumulate points which can be applied toward future grocery purchases.
- ▶ Lower-income families are increasingly purchasing food items from small, independent grocery retailers because of convenience and the ability to buy in small quantities.

Mexico Chilled Processed Meat by Type: % Retail Value Breakdown based on Retail Sale Price

	2005	2006	2007	2008	2009	2010
Bacon	8.3	7.9	8.0	8.2	7.3	6.9
Chorizo	3	3.3	4.0	4.2	3.9	4.4
Ham	29.2	29.6	30.0	30.0	32.4	32.2
Hot dogs	55.3	55.4	55.0	54.50	53.2	53.0
Mortadella	0.8	0.6	0.5	0.5	0.7	0.7
Pâté	0.8	0.8	0.7	0.6	0.4	0.4
Prosciutto	0.4	0.4	0.4	0.5	0.4	0.5
Salami	0.4	0.3	0.5	0.5	0.4	0.4
Others	1.6	1.7	0.8	0.8	1.2	1.3

Source: Euromonitor.

► DOMESTIC CONSUMPTION

- ▶ The volume of the Mexican meat, fish and poultry market totaled 2,965.3 million kg in 2009, and is forecast by Datamonitor to reach 3,269.4 million kg by 2014.
- ▶ Per capita consumption data of meat, fish and poultry in Mexico for 2009 showed the highest spending was on chilled meat products, followed by frozen meat products.
- ▶ In 2009, the meat, fish and poultry market was led by chilled meat products, with a market share of 43.7%, followed by frozen meat products, with 19.2%. The deli food and canned meat products categories were 12.2% and 6.4% respectively.
- ▶ The value of Mexico's chilled meat products sector was US\$13.3 million in 2009, and is forecast to reach US\$14.4 million by 2014. For 2009, the value of frozen meat products equaled US\$5.8 million, the deli food sector was valued at US\$3.7 million, and the canned meat products sector was worth US\$1.9 million. These numbers reflect an overall average growth of 2.3% from 2008 data.



► DOMESTIC CONSUMPTION (continued)

- ▶ Mexico's frozen food market was led by the frozen meat products segment (does *not* include poultry, fish or ready-meals), which represented 87.8% of the total value for 2009.
- ▶ In 2009, Mexico's volume consumption of frozen meat products reached 228.6 million kg and is forecast to grow to 465.1 million kg by 2014.
- ▶ The value of the Mexican frozen meat products sector for 2009 was US\$5.8 million. In 2014, that number is expected to be lower, at just US\$5.3 million.
- ▶ Hog production in Mexico for 2010 totalled 16 million head, with a value estimated at US\$2.5 billion (assuming an average slaughter weight on the hoof of 100 kg). The hog industry is described as highly fragmented and has approximately one million registered producers. Granjas Carroll de Mexico with 10% of market share, and Grupo Porcicola Mexicano (Kenken), with 7%, are the two largest. The remaining 83% market share belongs to "other" producers.
- ▶ Mexico's pork production for 2010 was 1.17 million tonnes carcass weight and was valued at US\$2.92 billion.

**Mexico Swine Meat in '000 of heads,
(100 metric ton cut weight)**

	2009	2010	2011
Slaughter (Reference)	15,200	14,600	14,800
Beginning Stocks	0	0	0
Production (Pig Crop)	1,162	1,150	1,179
Intra-E.U. Imports	0	0	0
Other Imports	678	671	671
Total Imports	678	671	671
Total Supply	1,840	1,836	1,850
Intra E.U. Exports	0	0	0
Other Exports	70	78	85
Total Exports	70	78	85
Human Domestic Consumption	1,770	1,758	1,765
Other Uses, Losses	0	0	0
Total Domestic Consumption	1,770	1,758	1,765
Ending Stocks	0	0	0
Total Distribution	1,840	1,836	1,850

Source: USDA GAIN Report.

Mexico Swine Animals in '000 of heads

	2009	2010	2011
Total Beginning Stocks	9,912	9,885	10,500
Sow Beginning Stocks	1,067	1,068	1,085
Production (Pig Crop)	15,966	16,007	16,150
Intra-E.U. Imports	0	0	0
Other Imports	7	8	8
Total Imports	7	8	8
Total Supply	25,885	25,900	26,658
Intra E.U. Exports	0	0	0
Other Exports	0	0	0
Total Exports	0	0	0
Sow Slaughter	20	10	10
Other Slaughter	15,180	14,610	14,790
Total Slaughter	15,200	14,620	14,800
Loss	800	780	750
Ending Inventories	9,885	10,500	11,108
Total Distribution	25,885	25,900	26,658

Source: USDA GAIN Report.



► DOMESTIC CONSUMPTION (continued)

**Mexico Processed Pork Exports (by HS Code)
by Market Value and % Share, in '000 US\$**

Commodity	Partner Country	2008		2009		2010		
		'000 US\$	% Share	'000 US\$	% Share	'000 US\$	% Share	% Change 2010/2009
HS: 021012, Bellies, Streaky and Cuts thereof, Swine Cured	Guatemala	333	31.32	235	62.91	318	62.32	36.47
	El Salvador	122	11.52	130	34.8	184	36.17	35.19
	Cuba	6	0.59	8	2.24	8	1.15	-7.52
	Japan	601	56.57	0	0.06	0	0	-98.09
HS: 021019, Swine Meat Cured, Not elsewhere specified	United States	0	0.02	0	0	23	96.39	0
	Unidentified country	0	0	0	0	1	3.61	0
	Cuba	0	0	11	100	0	0	-100
	Japan	1,892	99.98	0	0	0	0	0
HS: 1601, Sausages and Similar Products, of Meat, Meat Offal or Blood; Food Preparations of these Products	United States	31713	81.82	11,814	63.94	10,297	53.29	-12.84
	Guatemala	4,359	11.25	4,003	21.66	5,272	27.29	31.7
	El Salvador	2,135	5.51	2,082	11.27	2,504	12.96	20.26
	Cuba	553	1.43	575	3.11	1,248	6.46	117.09
	Canada	1	0	2	0.01	0	0	-100
HS: 160241, Hams and Cuts thereof of Swine Prepared or Preserved	United States	179	63.91	238	76.91	1,048	95.69	253.03
	Nicaragua	72	25.89	0	0	0	0	0
	El Salvador	20	7.02	60	19.24	47	4.3	-21.16
HS: 160242, Shoulders and Cut thereof of Swine Prepared or Preserved	Japan	1,079	100	363	100	284	100	-21.77
HS: 160249, Swine Meat and Meat Offal Not elsewhere specified/ Excluding Livers/ Including Mixtures, Prepared or Preserved	United States	241	7.93	707	32.41	1,731	49.78	144.93
	Guatemala	794	26.11	1,144	52.46	1,675	48.16	46.39
	Colombia	66	2.17	0	0	59	1.71	0
	Costa Rica	0	0	0	0	9	0.25	0
	Cuba	0	0.01	0	0.02	2	0.05	257.45
	Canada	0	0	0	0	1	0.04	1,925.71
Total Processed Pork	All	46,116	100	21,715	100	24,712	100	13.8

Source: Global Trade Atlas.





► FOODSERVICE INDUSTRY

- ▶ Mexico's foodservice industry was valued at US\$37 billion for 2010, based on value sales for total foodservice.
- ▶ Euromonitor is forecasting total foodservice industry value to reach US\$46 billion in 2015.
- ▶ In 2011, the majority of Mexico's foodservice value came from restaurants (55%) and street and mobile vendors (33%). Forecasts show little change through to 2014, with restaurants losing a few percentage points to street and mobile vendors.
- ▶ Due to safety concerns within the country, the Mexican tourism industry is suffering. Tourism is highly important to the consumer foodservice (CFS) industry in Mexico, as one quarter of the tourism GDP relies on prepared foodservices for travelers. Concerns about safety within the country are expected to rise and could take years to resolve.
- ▶ The foodservice industry in Mexico is highly fragmented, with no companies making more than 0.3% of total sales. Walmart is in the number one spot (0.3%) for retail sales in the CFS industry.
- ▶ To counter poor tourism sales in the CFS sector, restaurants kept prices low in 2010 (resulting in lower profit margins) and launched a number of price-based promotions to encourage more domestic consumption.

Mexico - Units, Transactions and Value Sales in Consumer Foodservice

	2005	2006	2007	2008	2009	2010
Units ('000)	553.7	568.6	599.2	609.0	594.1	596.7
Transactions (millions)	7,592.2	7,691.8	7,996.3	8,260.6	8,011.8	8,199.1
Sales in US\$ billions	34.2	35.1	37.0	38.0	35.6	36.8

Mexico - Forecast Units, Transactions and Value Sales in Consumer Foodservice

	2011	2012	2013	2014	2015
Units ('000)	607.6	621.1	637.3	656.3	677.9
Transactions (millions)	8,421.5	8,686.7	8,982.4	9,340.2	9,751.9
Sales in US\$ billions	38.2	39.8	41.5	43.6	46.0

Source for both: Euromonitor.

Note: Exchange rate of US\$0.071 used for all calculations.

Note 2: At the time of preparing this report, 2011 forecast data is the latest available.

Mexico Foodservice Analysis - Meat Product Sales - Historic/Forecast - US\$ millions

Product	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Canned meat products	189.34	196.5	208.04	219.56	229.82	239.33	248.23	256.55	264.24	271.75
Chilled meat products	303.38	315.01	333.77	352.52	368.84	384.28	399.26	413.00	425.31	437.09
Frozen meat products	2,960.64	3,058.16	3,154.02	3,248.14	3,337.14	3,423.9	3,507.79	3,586.72	3,662.75	3,735.28
Fresh pork	426.97	448.68	484.54	520.45	496.51	526.89	554.35	581.86	609.33	636.87

Source: Datamonitor. *Note:* At the time of preparing this report, 2011 forecast data is the latest available.



► FOODSERVICE INDUSTRY (continued)

Mexico Consumer Foodservice Independent vs. Chained Outlets by Format, 2010

Format	Independent	Chained	Total
Cafés/Bars	27,644	1,489	29,133
100% Home Delivery/Takeaway	1,830	1,085	2,915
Full-Service Restaurants	172,563	2,623	175,186
Fast Food	17,833	18,321	36,154
Street Stalls/Kiosks	352,521	817	353,338
Pizza Consumer Foodservice	2,857	1,576	4,433
Self-Service Cafeterias	-	-	-
Consumer Foodservice	572,391	24,335	596,726

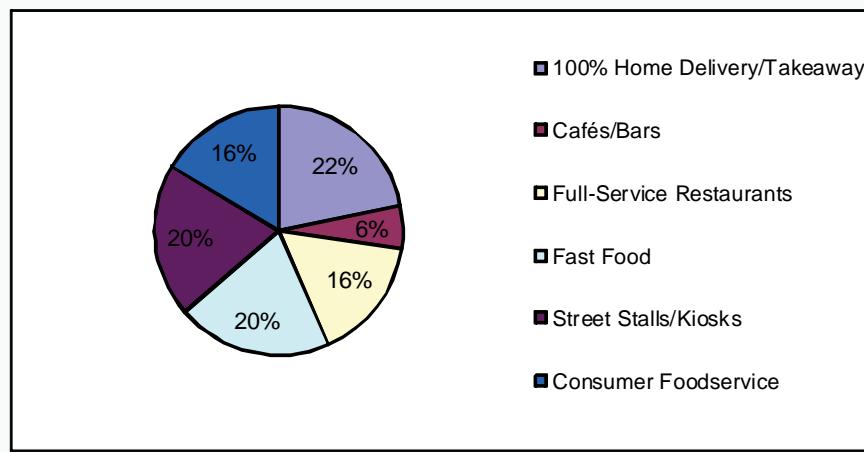
Source: Euromonitor.

Mexico Consumer Foodservice Eat-In vs. Takeaway, % Value 2010

Format	Eat-In	Takeaway
100% Home Delivery/Takeaway	-	100.0
Cafés/Bars	93.4	6.6
Full-Service Restaurants	93.4	6.6
Fast Food	17.5	82.6
Street Stalls/Kiosks	22.8	77.3
Self-Service Cafeterias	-	-
Consumer Foodservice	66.3	33.7

Source: Euromonitor.

Mexico Consumer Foodservice by Format % Value Breakdown, 2010



Source: Euromonitor.



► COMPETITION

- ▶ In 2010, 85% of Mexico's total pork and pork products import volumes came from the United States. Canada was the second-largest supplier, with 13% volume imports of pork and pork products into Mexico.
- ▶ Canada has seen a steady increase in unit value across several pork and pork product sub-categories since 2008.
- ▶ Unit pricing for processed pork and pork products grew in 2010 for most of Mexico's partner countries. Mexico's import of pork and pork products from Italy garnered the highest unit pricing (US\$19.90 per kilogram) of all the pork and pork product imports into the country.
- ▶ Mexico's imports of Canadian processed pork placed third in the country import list, reaching US\$7.4 million in sales and 719,191 kg in volume.
- ▶ The 2011 drought in Mexico worsened as the year progressed and reached conditions that had not been seen for decades. The result has been the limited availability of feed, generating higher prices and depressing live swine imports. Since grains represent 60% of swine production costs, producers also incurred production cost increases in the latter part of 2011.
- ▶ The Mexican Government will continue to stress the importance of reducing the amount of fat, sugar and sodium in consumers' diets, so expect to see manufacturers introducing chilled meat products with lower levels of fat and sodium.

Mexico Import Statistics — Commodity: Pork and Pork Products

Partner Country	2008			2009			2010		
	US\$	Quantity	Unit Price	US\$	Quantity	Unit Price	US\$	Quantity	Unit Price
World	1,053,955,722	642,529,592	1.64	1,081,256,181	763,078,472	1.42	1,418,052,306	786,193,747	1.8
U.S.	952,758,420	578,229,693	1.65	980,553,974	686,322,479	1.43	1,234,236,476	673,465,179	1.83
Canada	81,572,717	57,882,908	1.41	86,911,871	72,045,632	1.21	165,004,085	106,152,953	1.55
Spain	9,187,559	58,2473	15.8	7,898,792	493,687	16	11,128,473	719,191	15.5
Chile	5,907,760	4,429,967	1.33	3,400,309	3,432,643	0.99	4,597,705	4,706,484	0.98
Denmark	3,137,095	1,282,764	2.45	1,903,168	751,379	2.53	2,377,216	1,112,090	2.14
Italy	869,178	40,831	21.3	46,3352	19,542	23.71	664,478	33,333	19.9
Germany	25,589	1,769	14.5	8075	870	9.28	38,996	3,794	10.3
France	0	0	0	0	0	0	4,777	723	6.61
Australia	27,306	17,500	1.56	0	0	0	0	0	0
New Zealand	26,636	15,103	9.52	0	0	9.53	0	0	0
Colombia	443,462	46,584	1.76	12,240	12,240	0	0	0	0

*Unit Price is in US\$ per kilogram.

Source: Global Trade Atlas.



► COMPETITION (continued)

Mexico Processed Pork Import Statistics, US\$

Partner Country (by Rank)	2008			2009			2010		
	US\$	Quantity	% Share	US\$	Quantity	% Share	US\$	Quantity	% Share
1. United States	161,732,726	49,843,197	89.29	156,977,474	47,862,809	90.6	181,568,823	89.67	89.67
2. Spain	9,150,778	2,446,876	5.05	7,898,792	2,659,566	4.56	11,128,573	2,736,702	5.5
3. Canada	7,170,691	580,487	3.96	6,100,657	493,687	3.52	7,393,934	719,191	3.65
4. Denmark	1,695,929	426,313	0.94	1,427,785	345,697	0.82	1,335,165	342,583	0.66
5. Italy	869,178	23,370	0.48	463,352	118,425	0.27	664,478	142,005	0.33
6. Chile	49,237	40,831	0.03	266,179	19,542	0.15	361,730	33,333	0.18
7. Germany	25,589	1,769	0.01	8,075	870	0	38,996	3,794	0.02
8. France	0	0	0	0	0	0	4,777	723	0
9. Colombia	443,462	46,584	0.24	116,640	12,240	0.07	0	0	0

Source: Global Trade Atlas.

Mexico's Top Processed Pork Imports and Top Sourcing Country by Market Value in C\$, 2010

Commodity	Country	C\$	% Market
HS: 1601 Sausages and similar products, of meat, meat offal or blood; food prep of these products	United States	89,039,895	95
HS: 021012 Bellies, streaky and cuts thereof, swine cured	United States	54,580,694	92
HS: 160249 Swine meat and meat offal, excluding livers/including mixtures, prepared or preserved	United States	34, 829,329	98
HS: 021019 Swine meat cured	Spain	7,691,719	67
HS: 160241 Hams and cuts thereof of swine prepared or preserved	United States	5,542,563	77
HS: 021011 Hams, shoulders and cuts thereof, swine bone-in cured	Spain	2,098,654	97
HS: 160242 Shoulders and cut thereof of swine prepared or preserved	Spain	200,667	81

Source: Global Trade Atlas.



► COMPETITION (continued)

Mexico – Top 10 Meat (Fish and Poultry) Brand Shares by Value (%)

Company	Brand	2008	2009
Alfa, S.A. de C.V.	Overall	17.1	17.6
Pilgrim's Pride Corporation	Overall	8.5	8.4
Tyson Foods, Inc.	Overall	6.2	6.1
Kurson Kosher	Overall	5.2	5.2
Buenaventura Grupo Pecuario	Overall	5.0	4.9
Grupo Herdez	Herdez	3.6	3.6
Kraft Foods, Inc.	Overall	2.4	2.4
Qualtia Alimentos	Overall	1.6	1.7
Bachoco S.A. de C.V.	Overall	1.4	1.4
Pescados Industrializados S.A.	Overall	1.1	1.2

Source: Datamonitor.

Top 5 Chilled Processed Food Company Shares % Value Based on Retail Sales Price

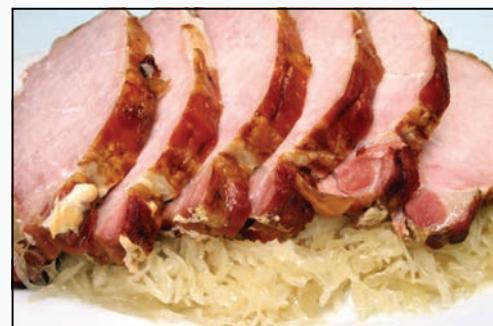
Company	2005	2006	2007	2008	2009
Sigma Alimentos SA de CV	42.69	42.48	45.57	44.45	44.66
Grupo Barar	13.87	13.79	14.01	13.83	13.79
Qualtia Alimentos SA de CV	11.81	11.71	11.71	11.72	11.72
Saljamex SA de CV	-	-	-	4.66	4.67
Empacadora Campo Frio SA de CV	4.88	4.84	4.87	4.28	4.22

Source: Euromonitor.

Mexico Pork Producers % Market Share by Value, 2010

Company	% Share
Grupo Porcicola Mexicano (Keken)	10
Grupo Kowi SA de CV	8
Norson	7
Sonora Agropecuaria	6
Grupo Baifar	5
Others	64

Source: USDA Gain Report.



Mexico, Top 5, Frozen Food Company Shares by Value (%)

Company	2008	2009
Alfa, S.A. de C.V.	43.2	43.0
McCain Foods Ltd	0.8	0.9
H.J. Heinz Company	0.8	0.8
Frigorizados La Huerta SA	0.7	0.7
ConAgra Foods Inc.	0.7	0.7

Source: Datamonitor.



► NEW MEAT PRODUCTS

According to Mintel, there were 27 new pork products released in Mexico over the 12 months commencing in August 2010. Below you will find a representative sample of the various product types. The following are some examples:



Gunter's Italian retails various packages of cold meats such as salami and ham, as well as provolone cheese. The packs are sold in 750 gram (g) tubs that are made of flexible material and are positioned as premium products. The unit sells for US\$12.01.

The Importadora Primex prosciutto roll comes in a 454 g flexible package and retails for US\$10.07.



Cochinita Pibil en Salsa Achiote Yucateca (Shredded Roast Pork in Yucatan Achiote Sauce) is offered under the Rancho Buen Sabor brand by Indistrua en Alimentos MEAT, S.A. de C.V. It comes frozen in a 300 g paper-board box priced at US\$3.31. This product is microwaveable.



Embutidos Corona, S.A. de C.V. is offering a baked ham that is low in salt and 98% fat free. This product comes in a 300 g plastic wrapper priced at US\$2.41.



Kowi Salchicha Supreme (sausages) from Frigorifico Kowi are available in a flexible, plastic sachet containing 5 sausages. This chilled product retails for US\$2.04.



Mortadela slices from Intercarnes are marketed under the Bafar brand. This shelf-stable product comes in a 200 g, easy-to-open, plastic pack and retails for US\$0.70.



Fried pork meat has been introduced into the Mexican market by Roberto Rivera Aguirre. The chilled product falls under the Carnitas Carmelo label, contains no preservatives, and is sold in a 500 g plastic stand-up bag which is priced at US\$6.95.



Smoked sliced bacon produced by Empacadora Bonnacarne under the brand name Nu-Tres retails in a 250 g, flexible, plastic package for US\$1.90.

Source for all: Mintel GNPD.



► EXPORT RESOURCES

Canadian exporters shipping food and agriculture products to Mexico are advised to ensure their products meet applicable Mexican import regulations, have the proper certification and are correctly labelled. It is also advisable to use reputable and experienced freight forwarders and customs brokers.

Expo Carnes is Mexico's biggest meat and poultry trade show and took place in February 2011 in Monterrey. The show organizers report that 3,700 visitors attended the 2011 show.

A list of Mexican meat importers can be found at the following link:
<http://www.meat1.com/meat-suppliers/mexico.html>.

► PRODUCT DEFINITIONS

Canned/Preserved Meat and Meat Products

Meat and poultry sold in cans, glass jars or aluminum/retort packaging, including processed plain meat products such as sausages, hot dogs, ham, corned beef, spam, luncheon meat, and pâté. This does not include meat or poultry packaged with vegetarian ingredients and/or sauces, as these products fall into the category of canned ready-meals. However, ambient meat snacks from China called *Huo tui* are included.

Chilled processed meat

Packaged processed meat (including beef, pork, lamb, and poultry) sold in self-service shelves of retail outlets, excluding unpackaged chilled processed meat sold over-the-counter. This definition includes burgers (meat or poultry based), nuggets, sausages, frankfurters, mortadella, pâté, ham (standard or smoked), salami (including regional specialties), pepperoni, chorizo, chilled snacks, as well as ambient products with shelf life of 2-6 months, such as salami and dried sausages, and vegetable meat analogues. Packaged raw pieces/cuts of meat and minced meat are excluded.

► RESOURCES

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The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada assumes no liability for any actions taken based on the information contained herein.

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