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Mexico

Coffee Annual

Mexico Launches New Policies as Rust Continues to Impact Production

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Report Highlights:

The Post/New marketing year (MY) 2016/17 forecast for coffee production is 2.3 million 60/kg bags. The Post/New MY 2015/16 total production estimate was revised downward to 2.2 million 60/kg bags due to coffee rust outbreaks affecting plantations. Coffee exports for MY 2015/16 and 2016/17 are expected to be lower compared to MY 2014/15, due to rust-related declines in production. Conversely, coffee imports for MY 2015/16 and 2016/17 are expected to increase to meet domestic demand.

Commodities:

Coffee, Green

PRODUCTION

Coffee production in Mexico has been hit hard for the last three years by coffee rust (known locally as *roya del café*). Production has decreased from 4.5 million 60/kg bags five years ago to 2.2 million 60/kg bags in marketing year (MY) 2015/16 (October/September). Coffee rust is a fungal disease that can lead to plant defoliation. In moderate cases, leaf defoliation reduces plants' ability to produce fruit (the seeds of which are the actual coffee bean) in the next cycle. In serious cases, plant mortality occurs. The advance of rust through Central America, Honduras, Panama, and Guatemala, began about five years ago before it reached the area of Chiapas in southern Mexico, spreading northward.

Although there is no official Mexican forecast for coffee production for MY 2016/17, the Post/New forecast (October/September) is 2.3 million 60/kg bags, a slight increase compared to last year's production. Producers agree that production will not be enough to cover demand. This forecast is preliminary as weather and disease events could still affect planted and harvested areas as well as crop yields during this marketing year.

The Post/New MY 2015/16 total production estimate was revised downward from previous estimates to 2.2 million 60/kg bags based on information from private industry contacts. As noted above, the coffee planted area nationwide has been affected by coffee rust. The areas with the highest percentage of area affected are Veracruz, with about 70 percent of total area affected, and Chiapas, with about 60 percent of total area affected. Some growers indicate that coffee rust has advanced due to slow government response and the need of better organization of coffee producers, which is why the government implemented the new [Integrated Program for Coffee](#) (PIAC in Spanish).

Coffee production for MY 2014/15 was revised downward based on official data to 3.1 million 60/kg bags.

Government Efforts to Address Coffee Rust

Since the change of administration in the Secretariat of Agriculture (SAGARPA) in 2015, it has launched new coffee-focused support programs. The federal government designed and is implementing the PIAC program, where the overall objective is to increase production and competitiveness to reach 4.5 million 60/kg bags by MY 2018/19. Among other goals, PIAC aims to develop certified nurseries to supply producers with quality disease-resistant plants, to renovate coffee plantations, and to provide maintenance and rehabilitation to the ones that are viable. Also, the PIAC will help producers by providing technological packages that guarantee sustainability of natural resources. Work will be

coordinated at different government levels to implement actions and have the tools to increase production.

SAGARPA, in coordination with INIFAP (National Institute of Forestry and Agricultural Investigation), is working to obtain coffee seed of different varieties resistant to coffee rust. INIFAP developed a plant variety that is resistant (Oro Azteca), and seeds will be imported from Costa Rica, Guatemala, Nicaragua, and some from Brazil. These seeds will be grown in nurseries to be distributed among coffee plantations. The plan is to renovate coffee plantations around Mexico and to put particular emphasis in the states of Veracruz, Puebla, Chiapas, Oaxaca and Guerrero, which represent more than 90 percent of production and have been hit hardest by coffee rust. Currently, there are 60 million plants that will be used to renovate 20,000 hectares. PIAC plans to renovate 200,000 hectares in the next three years. According to PIAC, small producers will have access to a package that will provide 3,000 plants per producer at a cost of \$6 pesos/plant (USD \$0.33/plant) and a technological package of \$5,000 to \$15,000 pesos (USD \$282.48 to \$847.45). Biofertilizers are being used in Veracruz with good results. SAGARPA will invest about USD \$67.4 million in this plan within the next two years.

Producers in Mexico indicate that coffee production for MY 2016/17 (October/ September) is forecast to grow slightly as a result of efforts from growers to control coffee rust and renovation of plantations. Government officials expressed that they expect coffee production in the country to recover most of its past production by MY 2018/19. SAGARPA, the National Service of Health, Food Safety, and Food Quality (SENASICA), the Integrated Coffee Production Chain (Sistema Productivo Café), the Mexican Coffee Association (AMECAFE), and INIFAP are all working to prevent and control coffee rust in Mexico. SENASICA, along with coffee sector organizations, is deeply involved in the establishment of strategies to control the coffee rust. SENASICA reports regularly on the [phytosanitary conditions](#) of coffee, and the most recent bulletin is from February 2016.

There are also efforts from state governments to support coffee production through tree renewal with pest-resistant plants. Other state initiatives include recovery of planted areas and support for various types of price-enhancing certifications (e.g. organic, fair trade, etc.). The state of Veracruz, based on a new local law, is encouraging production, trade, and coffee consumption in the state.

Other Factors Impacting Production

In addition to coffee rust, a number of other factors have led to the relatively flat/downward production levels witnessed in Mexico in recent years. Good agricultural practices were not followed by all producers, many coffee plantations were old and in need of tree renovation, and poor fertilization practices were common. In recent years, the cost of production has increased due to a lack of field labor. Field labor represents more than 80 percent of total production costs.

Production techniques and challenges continue to evolve. Some producers have been able to increase plant density from 2,600 plants per hectare to 5,000 or more. Also, some indigenous communities have begun to interplant other species, such as lime and avocado, amongst their coffee trees to diversify production and provide shade. This improves coffee quality and enhances eligibility for value added certifications like Rainforest Alliance and Shade Grown. SAGARPA manages a program entitled [Integrated Coffee Productive Chain](#) that includes all the actors in the coffee supply chain to help develop and support the sector by providing access to technology, training, industrialization, and trade

channels. Around 35 percent of Mexico's coffee production area is top-quality high altitude coffee, located at an altitude of 900 meters or more above sea level. Another 43.5 percent grows between 600 and 900 meters above sea level.

In general, Mexico is well-suited for coffee production due to its geographic location and climatic conditions. Recent reports indicate that about 96 percent of the coffee produced in Mexico is of the Arabica variety while 3 to 4 percent is of the Robusta variety. Although this production ratio has been maintained for some time, SAGARPA is now supporting the planting of Robusta coffee to try to substitute imports of this variety that the processing industry needs produce soluble coffee. Approximately 1,600 ha in Chiapas and about 2,000 ha in Veracruz have been converted turned to Robusta for this purpose. Larger amounts of Robusta are needed to support Mexico's goal of becoming a major producer of soluble coffee. The large Nestlé plant in the city of Toluca, just outside Mexico City, has been increasing its output of soluble coffee.

Mexico produces excellent organic coffee, a trend which is increasing amongst producers. However, output of organic coffee has decreased by a greater amount than conventional coffee in the areas affected by coffee rust. According to SAGARPA, about 7 to 8 percent of growers were cultivating organic coffee, mainly for export purposes.

Planted and Harvested Area

Like production volume, planted and harvested hectares in Mexico have been on a slow downward trend for a number of years due to adverse weather, such as freezing temperatures and atypical rainfall. Currently, however, coffee rust is the most important factor on the coffee area decrease. Some producers believe that adverse weather events are increasing in frequency due to climate change. Volatile prices have also had an impact.

However, the planted area for MY 2015/16 seems to have rebounded somewhat with an estimated 732,036 ha, up from 727,385 ha in MY 2014/15. The MY 2016/17 planted area is forecast to be similar to MY 2015/16 as the industry as well as the government take action to fight coffee rust and other productivity issues.

| Table 1.- Mexico - Coffee Production Selected States – MT not Processed | | | |
|--|--------------------|--------------------|--------------------|
| STATE | Production 2013/14 | Production 2014/15 | % Change 2014/2013 |
| Chiapas | 402,100 | 382,951 | -4.7 |
| Veracruz | 353,697 | 278,975 | -21.1 |
| Oaxaca | 129,781 | 83,076 | -0.2 |
| Puebla | 148,900 | 181,384 | 21.8 |
| Others | 131,547 | 111,324 | -15.3 |
| TOTAL | 1,166,025 | 1,037,710 | -11.0 |
| Source: SIAP/SAGARPA | | | |

| Table 2.-Mexico – Coffee Production 2015/16 (Oct/Sept) Estimates until March 2016 Selected States | | |
|--|-------------------|----------------------------------|
| STATE | Area Planted (Ha) | Production (MT) not processed |
| Chiapas | 258,815 | 318,354 |
| Veracruz | 145,426 | 143,391 |
| Oaxaca | 139,692 | 63,538 |
| Puebla | 73,618 | 119,921 |
| Others | 114,485 | 87,249 |
| TOTAL | 732,036 | 732,453 |
| Source: SIAP/SAGARPA | | |

Approximately, 98 percent of the Arabica varieties planted in Mexico are Bourbon, Caturra, Catimor, Catuai, Maragogipe, Mundo Novo, Garnica, and Typica. However, this is expected to change as new, more pest-resistant varieties will be planted. Coffee is produced in 15 states. In a typical year, the main producer is the state of Chiapas with 41 percent of production, followed by Veracruz with 28 percent of production, and Oaxaca with 11 percent of production. As indicated in Tables 1 and 2 above, rust has had a disproportionate impact on Chiapas production in MY 2015/16. Harvesting usually begins in September and ends by the month of March, depending on the area.

Yields continue to differ widely in Mexico due to variations in management and weather; however, most yields have decreased due to coffee rust impacts. Yields for MY 2016/17 are forecast to be slightly better compared to MY 2015/16, assuming that better management is achieved to control and prevent coffee rust issues. Yields for MY 2015/16 are estimated at about 1.3 MT/Ha, lower compared to yields of 1.5 MT/Ha during MY 2014/15. At the state level, yields in Veracruz for MY 2015/16 are expected at 1.4 MT/Ha, lower compared to MY 2014/15 yields of 2.0 MT/Ha. Chiapas' yields also are expected to be lower for MY 2015/16 at 1.4 MT/Ha from 1.5 MT/Ha in MY 2014/15. Puebla is expected to have yields of 2.3 MT/Ha for MY 2015/16, from yields of 3.0 MT/Ha during MY 2014/15.

CONSUMPTION

Domestic coffee use (both roasted and soluble coffee) for MY 2016/17 is forecast at 2.3 million 60kg/bags, assuming relatively stable domestic prices. Per capita consumption of coffee in Mexico had been increasing; however, due to lower production, consumption demand will be met by importing coffee. Opinions differ on the impact of lower domestic supplies on consumption, as there is uncertainty regarding whether there will be sufficient imports to meet domestic demand. Average annual consumption is typically 1.3 kg/per capita to 1.5 kg/per capita. Consumption has been driven by promotions and the growing number of coffee shops in Mexico. Ground coffee consumption has increased and is the second largest share of domestic use. Soluble coffee is still very important and has about 67 to 69 percent share of consumption. Post/New MY 2014/15 and MY 2015/16 coffee use estimates were revised upward from previous estimates to 2.3 million 60kg/bags, based on current official information. According to AMECAFE, about 40 percent of domestic coffee production is marketed for local consumption, and the remaining 60 percent is for export purposes. However, due to lower domestic production, producers will try to fulfill their international contracts first and leave the residual for domestic consumption. Official sources confirm that Mexico lacks a reliable consumption monitoring system.

TRADE

Certain Mexican government policies make estimation of coffee imports difficult. There is a [Sectorial Promotion Program \(PROSEC\)](#) managed by the Secretariat of Economy that allows the importation of a product at a preferential tariff as long as the product is transformed into a different product. The stated goal of the program is to increase competitiveness and supply chain efficiency in certain sectors and thus provides preferential access regardless of whether finished products are for domestic users or for export. In the case of coffee, products under the following harmonized system (HS) numbers are included: 0901.12, 0901.21, 0901.22, and 2101.11.01. Coffee imported under this program is classified under HS number 9802.0022 –“Import of goods via special operations of the Industry of Coffee”. However, all types of coffee (beans, roasted, and soluble) are classified together, masking the actual type of coffee imported. According to official data, about 725,000 60/kg bags were imported for MY 2014/15. Most coffee under this special tariff is imported from Vietnam and Brazil. Imports for MY 2015/16 are expected to be similar or higher and imports for MY 2016/17 are forecast to continue this trend to cover domestic demand.

Increasing imports of coffee are attributed in part to increased demand by middle-income consumers who are searching for different options from domestic soluble brands, as well as by high-income consumers who want fashionable value-added imported coffee. Imports of roasted coffee increased as consumers now have more options for freshly-made coffee via the increasing number of specialty coffee shops in the country. However, since 2014, coffee imports have also increased to cover demand due to lower domestic production. Coffee imports for MY 2015/16 and 2016/17 are expected to increase once again due to lower domestic supplies. Mexico is importing large quantities of coffee beans—mainly Robusta variety—as the Nestle plant in the city of Toluca in the State of Mexico, has increased its soluble coffee production capacity. However, this company has also increased the use of Arabica coffee in its products.

Although there is no official Mexican forecast for coffee imports, the Post MY 2016/17 forecast for total imported coffee is 1.8 million 60/kg bags, which is a slight increase over MY 2015/16 estimated imports. The larger volume of imported coffee is the result of lower coffee production and increasing

demand. Total coffee imports for MY 2015/16 are estimated to be just under 1.8 million 60/Kg bags; however, some industry sources believe that imports will be closer to 2.2 million bags to cover domestic demand.

On April 1, 2014, the Secretariat of Economy (SE) published a regulation modifying a previous announcement of a duty free import quota for roasted and ground coffee in the *Diario Oficial* (Federal Register). This continues a policy of promoting the packaging of coffee in 40-gram containers for household consumption. The impacted HS tariff lines are 0901.21.01; 0901.22.0; and 0901.90.99. (See GAIN Report [MX 4031](#) *Modifications to Duty Free Imports of Coffee in 40 Gram Containers*.) The regulation will remain in effect until December 31, 2018. Undoubtedly, prices will play a key role in the volume to be imported.

Although there is no official Mexican forecast for coffee exports for MY 2016/17, the Post/New forecast is 1.8 million 60/kg bags. However, this number is still tentative and will tend to change depending on final production and international prices. Exports for MY 2015/16 were revised downward from the previous estimate due to lower domestic supplies. Exports for MY 2014/15 were revised slightly upward from previous estimates, while still reflecting low overall exports due to lower supplies.

The United States continues to be the main international market for Mexican green coffee. The MY 2015/16 export estimate to the United States was revised downward from previous estimates as exports were influenced by low international prices, and lower domestic production volumes due to coffee rust. The MY 2014/15 export estimate was revised slightly upward based on U.S. trade data.

STOCKS

Post expects MY 2016/17 ending stocks to be similar or slightly higher than the MY 2015/16 revised estimate due to low production. Ending stock estimates for MY 2015/16 were revised upward from previous estimates, but still could decrease due to low production estimates. MY 2014/15 stocks estimates remained unchanged based on available data. AMECAFE reports that Mexico has never had a reliable system to record ending stocks; therefore, data is largely anecdotal from industry sources.

MARKETING

In order to offset relatively low per capita consumption levels and to counter the belief that there are negative health effects associated with consuming coffee, the Mexican coffee industry is promoting the health benefits of high-quality Mexican blends. Consumers with relatively greater purchasing power have been targeted by the specialty coffee sector for years, while soluble coffee consumption is more popular among consumers with lower incomes.

A large U.S.-headquartered retail store specializing in coffee sales reported that it has opened more than 300 stores in Mexico. They have also begun offering Mexican sub-origin labeled coffee such as “Chiapas.” These coffees are often bought by intermediaries who purchase directly from private farmers or cooperatives. The rapid growth in coffee shops has attracted foreign and domestic investment, especially since the consumption of coffee in fast-food chains has developed into a new market as well. As a result of successful negotiations with powerful retailers, many small local brands

are reaching supermarket and hypermarket shelves. Some of the companies behind this gradual change in distribution are specialty coffee shops.

Also, producers have established business contacts with the National Association of Supermarkets and Department Stores (ANTAD) and commercial chains like Wal-Mart in order to promote retail sales of Mexican coffee.

AMECAFE, SAGARPA, and the coffee sector typically hold the [Cup of Excellence](#) Competition annually in Mexico. The competition aims to promote the marketing of quality Mexican coffee in international markets. However, due to the government reorganization and the coffee rust effects on production, this competition will not be held in 2016.

Production, Supply and Demand Data Statistics:

Table 3. Mexico - Coffee Production, Supply and Demand

| Coffee, Green Market Begin Year | 2014/2015 | | 2015/2016 | | 2016/2017 | |
|---|---------------|----------|---------------|----------|---------------|----------|
| | Oct 2014 | | Oct 2015 | | Oct 2016 | |
| Mexico | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Area Planted | 0 | 0 | 0 | 0 | 0 | 0 |
| Area Harvested | 0 | 0 | 0 | 0 | 0 | 0 |
| Bearing Trees | 0 | 0 | 0 | 0 | 0 | 0 |
| Non-Bearing Trees | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Tree Population | 0 | 0 | 0 | 0 | 0 | 0 |
| Beginning Stocks | 169 | 169 | 123 | 123 | 0 | 70 |
| Arabica Production | 3100 | 2980 | 3200 | 2050 | 0 | 2100 |
| Robusta Production | 200 | 200 | 200 | 200 | 0 | 200 |
| Other Production | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Production | 3300 | 3180 | 3400 | 2250 | 0 | 2300 |
| Bean Imports | 720 | 1441 | 900 | 1550 | 0 | 1600 |
| Roast & Ground Imports | 70 | 70 | 75 | 75 | 0 | 75 |
| Soluble Imports | 175 | 137 | 175 | 170 | 0 | 180 |
| Total Imports | 965 | 1648 | 1150 | 1795 | 0 | 1855 |
| Total Supply | 4434 | 4997 | 4673 | 4168 | 0 | 4225 |
| Bean Exports | 1525 | 1530 | 1400 | 1080 | 0 | 1100 |
| Rst-Grnd Exp. | 175 | 174 | 150 | 124 | 0 | 125 |
| Soluble Exports | 835 | 854 | 900 | 594 | 0 | 600 |
| Total Exports | 2535 | 2558 | 2450 | 1798 | 0 | 1825 |
| Rst,Ground Dom. Consum | 470 | 788 | 500 | 780 | 0 | 795 |
| Soluble Dom. Cons. | 1306 | 1528 | 1673 | 1520 | 0 | 1530 |
| Domestic Consumption | 1776 | 2316 | 2173 | 2300 | 0 | 2325 |
| Ending Stocks | 123 | 123 | 50 | 70 | 0 | 75 |
| Total Distribution | 4434 | 4997 | 4673 | 4168 | 0 | 4225 |
| (1000 HA) ,(MILLION TREES) ,(1000 60 KG BAGS) | | | | | | |

Trade Matrixes

| Mexico: Green Coffee Imports in Metric Tons (MY Oct/Sep) (HTS: 090111 and 090112) | | | |
|--|------------|--------|-------------|
| Origin | MY 2014/15 | Origin | MY 2015/16* |
| U.S. | 7,575 | U.S. | 3,000 |

| | | | |
|--------------------|---------------|--------------------|---------------|
| Vietnam | 3,595 | Vietnam | 730 |
| Brazil | 19,826 | Brazil | 7,323 |
| Other not listed | 11,946 | Other not listed | 2,159 |
| Grand Total | 42,942 | Grand Total | 13,212 |

| Mexico: Green Coffee Exports in Metric Tons (MY Oct/Sep) (HTS: 090111 and 090112) | | | |
|--|-------------------|--------------------|--------------------|
| Destination | MY 2014/15 | Destination | MY 2015/16* |
| U.S. | 57,030 | U.S. | 8,823 |
| Belgium | 5,979 | Belgium | 736 |
| Japan | 1,477 | Japan | 80 |
| Germany | 2,903 | Germany | 229 |
| Other not listed | 24,418 | Other not listed | 5,748 |
| Grand Total | 91,807 | Grand Total | 15,616 |

| Mexico: Roasted Coffee Imports in Metric Tons on a Green Bean Equivalent Basis (HTS: 090121 and 090122) (MY Oct/Sep) | | | |
|---|-------------------|--------------------|--------------------|
| Origin | MY 2014/15 | Origin | MY 2015/16* |
| U.S. | 2,159 | U.S. | 709 |
| United Kingdom | 781 | United Kingdom | 339 |
| Other not listed | 1,153 | Other not listed | 506 |
| Grand Total | 4,093 | Grand Total | 1,554 |

| Mexico: Roasted Coffee Exports in Metric Tons on a Green Bean Equivalent Basis (HTS: 090121 and 090122) (MY Oct/Sep) | | | |
|---|-------------------|--------------------|--------------------|
| Destination | MY 2014/15 | Destination | MY 2015/16* |
| U.S. | 963 | U.S. | 366 |
| Other not listed | 9,475 | Other not listed | 1,179 |
| Grand Total | 10,438 | Grand Total | 1,545 |

| Mexico: Soluble Coffee Imports in Metric Tons on a Green Bean Equivalent Basis (HTS: 21011101, and 210112) (MY Oct/Sep) | | | |
|--|-------------------|--------------------|--------------------|
| Origin | MY 2014/15 | Origin | MY 2015/16* |
| U.S. | 4,825 | U.S. | 1,840 |
| Colombia | 1,807 | Colombia | 449 |
| Other not listed | 1,623 | Other not listed | 402 |
| Grand Total | 8,255 | Grand Total | 2,691 |

| Mexico: Soluble Coffee Exports in Metric Tons on a Green Bean Equivalent Basis (HTS: 21011101, and 210112) (MY Oct/Sep) | | | |
|--|-------------------|--------------------|--------------------|
| Destination | MY 2014/15 | Destination | MY 2015/16* |
| U.S. | 32,349 | U.S. | 6,125 |
| Other not listed | 18,886 | Other not listed | 4,984 |
| Grand Total | 51,235 | Grand Total | 11,109 |

SOURCE: Global Trade Information Services, Inc. World Trade Atlas Mexico Edition, December 2015.

* As of December 2015

| Table 4. Mexico: Monthly Exchange Rate | | | | |
|---|-------------|-------------|-------------|-------------|
| Averages for 2013-2016 | | | | |
| MX Pesos per U.S. \$1.00 | | | | |
| | 2013 | 2014 | 2015 | 2016 |
| January | 12.71 | 13.20 | 14.68 | 18.02 |
| February | 12.69 | 13.28 | 14.92 | 18.47 |
| March | 12.54 | 13.22 | 15.21 | 17.69 |

| | | | | |
|---|-------|-------|-------|-------|
| April | 12.21 | 13.29 | 15.22 | 17.49 |
| May | 12.95 | 12.93 | 15.26 | |
| June | 12.94 | 12.99 | 15.46 | |
| July | 12.77 | 12.97 | 15.92 | |
| August | 12.89 | 13.14 | 16.50 | |
| September | 13.08 | 13.21 | 16.85 | |
| October | 13.00 | 13.47 | 16.58 | |
| November | 13.07 | 13.59 | 16.63 | |
| December | 13.00 | 14.44 | 17.03 | |
| Annual Avg | 12.76 | 13.29 | 15.85 | |
| Source: Mexican Federal Register | | | | |
| Note: Monthly rates are averages of daily exchange rates from the Banco de Mexico | | | | |

Other Relevant Reports Submitted by FAS/Mexico:

| Report Number | Subject | Date Submitted |
|-------------------------|----------------------|----------------|
| MX 5021 | Coffee Annual Report | 05/18/2015 |

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