

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## **Mexico**

### **Dairy and Products Semi-annual**

## **Mexico Represents Nearly 25 Percent of U.S. Dairy Exports in 2011**

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**Report Highlights:**

Post Mexico City has lowered its marketing year (MY) 2012 forecast and MY2011 estimate for Mexican dairy production. Better genetics and management are helping improve yields over last year's levels in spite of the record drought which is forcing consolidation and overall herd reductions. Production does not meet demand and Mexico will continue importing dairy products, principally from the United States. In 2011, Mexico became the first \$1 billion market for U.S. dairy and related products.

**Commodities:**

Dairy, Milk, Fluid

**Production:**

The Post MY2012 (January to December) fluid milk production forecast was revised slightly downward to 10.967 million metric tons (MMT) from USDA’s Official forecast of 11.140 MMT as harsh conditions — an exceptional long-term drought — continue affecting the dairy sector, despite government financial support for small and medium-sized producers. Private sources indicate that the total number of milk producers has gone from 200,000 in 2008 to 160,000 today due to higher production costs. Recent analysis indicates that 70 percent of the milk production cost is linked to animal feed. An additional and important factor driving down the number of producers is the perceived low domestic milk price.

The Post fluid milk production estimate for MY2011 is revised downward slightly from the USDA estimate to reflect official data from Mexico’s Secretariat of Agriculture, Livestock, Rural Development, Fishery and Food (SAGARPA). As previously reported, this decrease is due to increased production costs and adverse weather conditions. Milk production costs increased due to high feed and energy prices. Also, the lack of moisture across almost all of Mexico through MY2011 caused a reduction in forage supplies thereby constraining production among small and medium-sized producers. The Post fluid milk production estimate for MY2010 remains unchanged from the USDA/Official estimate.

Starting in late MY2011 and during the first quarter of MY2012, small and medium-sized producers have been sending milking cows, which are at the end of their productive cycle, to slaughter as opposed to rendering facilities. Highly productive cows are being sold to larger vertically integrated farms; most of these farms are associated with large processing companies. Although small and medium-sized producers are exiting the industry or reducing herd sizes, more productive milk cows at large, vertically integrated farms will support MY2012 production at levels similar to MY2011 production. The sustained milk production level is due to better herd genetics and improved production practices.

There is no change to the number of milk cows for MY2010 from USDA’s estimate. The Post MY2011 estimate of milk cows was revised slightly lower from the USDA estimate due to the increased cost of animal feed and slower than anticipated economic recovery which pushed producers to decrease herd size. The number of milk cows for MY2012 is forecast lower than the USDA forecast, as well.

Table 1. Mexico: Total fluid milk production by State, calendar year 2006-2011 and January-March 2012, in thousand liters.

	2006	2007	2008	2009	2010	2011*	2012**
AGUASCALIENTES	383,658	375,401	370,399	367,171	369,253	372,252	369,000

BAJA CALIFORNIA	166,868	207,915	193,422	179,795	174,027	181,190	163,886
BAJA CALIFORNIA SUR	44,634	43,150	46,451	46,104	44,323	41,144	42,193
CAMPECHE	34,241	35,517	35,029	36,271	36,146	36,364	37,815
COAHUILA	1,247,356	1,286,281	1,363,762	1,282,618	1,243,058	1,275,065	1,284,985
COLIMA	39,039	36,146	36,525	32,349	34,883	36,059	34,095
CHIAPAS	327,138	353,085	372,249	366,393	385,455	402,583	396,876
CHIHUAHUA	808,641	817,919	926,222	923,053	934,928	930,020	913,963
DISTRITO FEDERAL	13,138	10,058	12,322	13,652	13,643	13,784	13,802
DURANGO	1,014,535	1,019,227	1,036,581	959,716	1,001,137	999,729	1,042,008
GUANAJUATO	673,007	674,660	684,202	761,759	775,108	793,926	771,000
GUERRERO	81,868	82,001	81,552	84,157	86,892	83,764	86,422
HIDALGO	445,465	460,773	452,977	439,361	419,273	398,540	404,350
JALISCO	1,697,486	1,793,579	1,855,362	1,900,343	1,960,999	1,994,577	2,010,358
MEXICO	476,231	478,211	464,573	464,704	478,261	481,936	483,379
MICHOACAN	328,404	328,185	329,079	331,909	331,038	334,934	341,134
MORELOS	18,551	21,105	18,809	20,901	21,784	20,890	20,850
NAYARIT	64,506	64,536	61,974	60,130	60,742	59,601	60,130
NUEVO LEON	39,473	41,432	39,909	40,586	40,397	37,790	38,751
OAXACA	140,720	142,795	145,213	146,406	147,080	147,933	154,324
PUEBLA	367,963	384,707	384,285	395,211	403,100	405,338	409,003
QUERETARO	198,488	200,835	195,791	192,435	192,422	195,147	229,761
QUINTANA ROO	5,250	5,642	5,623	5,829	5,921	5,562	6,246
SAN LUIS POTOSI	147,591	140,630	141,828	132,285	130,899	128,772	128,246
SINALOA	82,067	88,633	93,779	95,943	102,081	107,909	107,296
SONORA	142,052	137,780	134,921	126,496	129,355	112,055	130,510
TABASCO	115,617	110,603	110,694	111,533	111,416	105,362	106,970
TAMAULIPAS	31,520	29,224	30,209	32,326	30,242	29,666	28,513
TLAXCALA	99,158	110,258	110,924	120,356	115,223	106,574	106,801
VERACRUZ	681,809	692,754	697,288	708,230	722,465	726,409	719,482
YUCATAN	6,769	5,557	5,608	4,366	3,441	3,146	3,026
ZACATECAS	165,309	167,383	163,293	166,655	171,703	174,618	168,111
NACIONAL	10,088,551	10,345,982	10,498,994	10,549,038	10,676,693	10,742,633	10,813,286

Lagunera Area /1 2,122,092 2,205,498 2,255,272 2,090,707 2,092,807 2,117,562 2,197,301

Source: SIAP-SAGARPA: The Agro-food and Fishery Information Service, Secretariat of Agriculture, Livestock, Rural Development, Fishery and Food (SAGARPA)

\*SAGARPA's definitive figures for 2011

\*\*SAGARPA'S preliminary figures for 2012

### Consumption:

The Post MY2012, total fluid milk consumption forecast (domestic and factory use) was revised downward to 10.996 MMT in comparison to the USDA forecast of 11.169 MMT. The Post MY2011 total fluid milk consumption was revised downward slightly from the USDA estimate due to official data. There is no change to the MY2010 consumption estimate.

It is important to note the trade-offs between fluid domestic consumption and factory use. Fluid domestic consumption decreased noticeably from USDA forecasts and estimates as consumers are switching to other prepared and processed dairy products such as yogurts and other preparations that offer attractive prices, a full range of flavors, and a longer shelf life. Private sources estimate that financial constraints among the low to middle income population sectors and the slowdown in population growth have contributed to the drop in fluid milk consumption.

Industry sources report that per capita dairy product (milk, cheese, yogurt, etc.) consumption is estimated at 140 kilograms (63.5 pounds). Also, the same sources report that Mexico shows a per capita consumption of 139.5 liters per year of fluid milk or 385 milliliters per day which is far below the WHO recommendations of at least 500 milliliters per day.

Consumption levels are correlated with the continued recovery of consumer purchasing power as well as changing demographics (e.g., aging of the population). The trend is for the increased consumption of added value dairy products such as yoghurts, cheeses as well as of ultra high temperature (UHT) milk. Dairy products such as lactose free, light, low-fat and flavored milk, formulas, etc., are gaining domestic market share and demanding more fluid milk for processing and production.

#### **Prices:**

On October 9, 2011, LICONSA <sup>[1]</sup> announced a 0.60 pesos (U.S. \$0.04) per liter increase to the price paid to producers in order to benefit small and medium-sized producers for a final price of 5.60 pesos (USD \$0.42) per liter. On the consumer price side, LICONSA announced that the price of milk distributed to low-income households was increased 0.50 pesos (U.S. \$0.03) per liter for a final price of 4.50 (USD \$0.33).

LICONSA's price paid to dairy producers is used as a domestic reference price as many small and medium producers supply milk to LICONSA. During President Calderon's administration LICONSA has purchased more than 3.0 billion liters of milk from Mexican milk producers. This figure represents 70 percent of the amount sold to the low income level population. The remaining 30 percent is imported to be reconstituted or used in the production of added-value products.

<sup>[1]</sup> Liconsa, S. A. de C.V. is "a state-owned company devoted to the industrialization and distribution of high-quality milk at a reasonable price, whose main purpose is supporting the nutritional resources of disadvantaged families to contribute to human capital development."

#### **Trade:**

Mexico remains a milk production deficit nation and will continue to be an attractive market for U.S. dairy and dairy product exporters. As such, the United States will continue to be the primary supplier of fluid milk to Mexico.

The Post fluid milk import forecast for MY2012 remains unchanged from the USDA forecast at 39,000 MT. The Post MY2011 fluid milk import estimate is revised downward from the USDA/Official

estimate due to higher prices resulting from currency exchange rates and the increase in consumption of other processed dairy products. The Post MY2010 fluid milk import estimate remains unchanged from the USDA estimate.

The Post MY2012 fluid milk export forecast remains unchanged from the USDA forecast at 10,000 MT. This is due to the relatively attractive price of Mexican fluid milk and the perceived cumbersome registration process for new companies to be certified as eligible to export. Figures for MY2011 and MY2010 remain unchanged and reflect official data.

**Stocks:**

No stocks are held due to the lack of refrigeration storage space among producers and end-users. As such, end-users utilize just-in-time delivery for those products which enter value-added processes.

**Production, Supply and Demand Data Statistics:**

Dairy, Milk, Fluid Mexico	2010		2011		2012	
1000 MT	Market Year Begin: Jan 2010		Market Year Begin: Jan 2011		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Cows In Milk (heads)	6,480	6,480	6,500	6,400	6,500	6,400
Cows Milk Production	11,033	11,033	10,878	10,743	10,975	10,813
Other Milk Production	168	168	165	162	165	154
Total Production	11,201	11,201	11,043	10,905	11,140	10,967
Other Imports	41	41	39	38	39	39
Total Imports	41	41	39	38	39	39
Total Supply	11,242	11,242	11,082	10,943	11,179	11,006
Other Exports	9	9	10	10	10	10
Total Exports	9	9	10	10	10	10
Fluid Use Dom. Consum.	5,167	5,167	4,672	4,000	4,669	4,050
Factory Use Consum.	6,066	6,066	6,400	6,933	6,500	6,946
Feed Use Dom. Consum.	0	0	0	0	0	0
Total Dom. Consumption	11,233	11,233	11,072	10,933	11,169	10,996
Total Distribution	11,242	11,242	11,082	10,943	11,179	11,006

**Commodities:**

Dairy, Cheese

**Production:**

The Post MY2012 total cheese production forecast remains unchanged from the USDA forecast even though there is a slight decrease in fluid milk production. The Post MY2011 estimate was revised upward slightly to 270,000 MT from the USDA estimate to reflect available recent private data. The

production increase reflects the trend of consumers switching to other dairy products prepared by the processing industry such as cheeses and the increased availability of imported and domestic raw materials for cheese production. The Post estimate for MY2010 cheese production remains unchanged at 264,000 MT.

**Consumption:**

The Post MY2012 total cheese consumption forecast shows marginal increases over the USDA forecast due to greater demand from low and lower-middle income consumers of fresh cheese. Additionally, the consumption of aged cheese among high-middle and high-income consumers is expected to be greater than the USDA estimate for MY2011. This reflects the most recent industry data that indicates a change in consumption patterns in favor of prepared breakfast and lunch foods that contain some cheese component. The Post MY2010 consumption estimate is unchanged from the USDA estimate.

**Trade:**

As previously reported, on October 21, 2011, Mexico lifted retaliatory duties applied to four HTS codes for cheese (see 2010 GAIN report MX1076 *Mexico Eliminates Trucking Retaliation Tariffs*). Although the retaliatory tariff duties made cheeses from the four HTS codes more expensive, middle and high-income consumers continued demanding them during MY2011.

Private sources from the dairy sector indicate that during 2011, 620,000 MT of dairy products entered Mexico. Sources estimate that 14 percent of this volume included specialty cheeses.

The Post MY2012 import forecast remains unchanged from the USDA forecast. The year over year increase is spurred by Mexico’s economic recovery. The Post MY2011 import estimate is a slight increase from USDA’s estimate. The Post import estimate for MY2010 remains unchanged from the USDA/Official estimate.

Not a significant exporter, the Post MY2012 cheese export forecast is revised lower than the USDA forecast. The Post MY2011 export estimate also was revised lower than the USDA estimate due to low dairy product prices in the international market which did not draw significant demand response from Mexico. The MY2011 estimate reflects official data, as well. The Post export estimate for MY2010 remains unchanged from the USDA estimate.

**Production, Supply and Demand Data Statistics:**

Dairy, Cheese Mexico  1000 MT	2010		2011		2012	
	Market Year Begin: Jan 2010		Market Year Begin: Jan 2011		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	0	0	0	0	0	0
Production	264	264	267	270	270	270
Other Imports	80	80	75	78	85	85
Total Imports	80	80	75	78	85	85
Total Supply	344	344	342	348	355	355

Other Exports	6	6	7	4	7	5
Total Exports	6	6	7	4	7	5
Human Dom. Consumption	338	338	335	344	348	350
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	338	338	335	344	348	350
Total Use	344	344	342	348	355	355
Ending Stocks	0	0	0	0	0	0
Total Distribution	344	344	342	348	355	355

### Commodities:

Dairy, Butter

### Production:

The Post MY2012 butter production forecast is maintained at 185,000 MT. This forecast is unchanged from the USDA forecast due to slightly lower fluid milk production. The Post MY2011 estimate for butter production remains unchanged since, historically, the production stems from the availability of fluid milk as well as improved processor profits resulting from higher international butterfat prices. Production for MY2010 remains unchanged from the USDA estimate.

### Consumption:

The Post MY2012 butter and butterfat consumption forecast is a 2.3 percent increase from the USDA forecast as use by the bakery and confectionary sectors is expected to be stronger than previously anticipated. During MY2011, the baking, confectionary and food processing industries depended on domestic production, but the new demand will likely be met with imports. The Post estimate for MY2010 remains unchanged from the USDA estimate.

### Trade:

The Post MY2012 import forecast is raised to 35,000 MT from the USDA forecast of 30,000 MT due to a combination of limited domestic production and sustained demand from the bakery and confectionary sectors. The Post MY2011 estimate is revised downward the USDA estimate to reflect official data and is explained by the reduced butterfat import needs of the baking and confectionary sector as these sectors substituted for domestic raw materials. The Post MY2010 import estimate remains unchanged from the USDA estimate.

New Zealand will continue to be the principal supplier of butterfat to Mexico for MY2012. The United States, however, is forecast to maintain market share.

### Production, Supply and Demand Data Statistics:

Dairy, Butter Mexico  1000 MT	2010		2011		2012	
	Market Year Begin: Jan 2010		Market Year Begin: Jan 2011		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	0	0	0	0	0	0

Production	182	182	187	187	185	185
Other Imports	49	49	38	36	30	35
Total Imports	49	49	38	36	30	35
Total Supply	231	231	225	223	215	220
Other Exports	0	0	0	0	0	0
Total Exports	0	0	0	0	0	0
Domestic Consumption	231	231	225	223	215	220
Total Use	231	231	225	223	215	220
Ending Stocks	0	0	0	0	0	0
Total Distribution	231	231	225	223	215	220

### **Commodities:**

Dairy, Milk, Nonfat Dry

### **Production:**

The Post MY2012 production forecast for Non-fat Dry Milk (NFDM) is unchanged from the USDA forecast due to lower fluid milk production. The Post production estimate for MY2011 and MY2010 were kept unchanged, as well.

As previously reported, NFDM is more expensive than whole milk powder (WMP) and is produced, in more substantial volumes, only when there is seasonal overproduction of fluid milk. Sources have reported that Mexico's milk powder production may be able to marginally increase once a new plant in the state of Jalisco is fully operational and capable of managing seasonal surpluses that occur during rainy seasons. (See Dry Whole Milk Powder Production section, below, for additional information).

### **Consumption:**

The Post NFDM MY2012 consumption forecast of 203,000 MT is higher than the USDA forecast of 183,000 MT due to the sustained demand from the industry for production of added-value products. In light of the reduced availability of fluid milk, imports will help meet the sustained demand. The Post consumption estimate for MY2011 is revised upwards to 207,000 MT from the USDA estimate of 193,000 MT as consumer's preferences for added-value products is growing. The Post consumption estimate for MY2010 is unchanged from the USDA estimate.

Sources report that the principal consumers of NFDM are dairy processors who reconstitute the material and sell it as pasteurized or Ultra-high-temperature (UHT) milk. Some, as well, sell NFDM to the confectionary industry.

### **Trade:**

The Post MY2012 import forecast for NFDM has been revised upward from the USDA forecast as domestic production is not sufficient to meet domestic demand. The Post import estimate for MY2011 was revised upward to reflect official data. The MY2010 estimate is unchanged from the USDA estimate.

As previously reported, during December 2010, the Secretariat of Economy (SE) announced TRQs for milk powder (and dairy blends) for 2011. (See 2010 GAIN reports [MX0095](#) & [MX0096](#)). It is expected that 70 percent of NFDM imports will be rehydrated into fluid milk, UHT milk, and other added-value products such as chesses, yogurts, and ice cream formulations. The remaining 30 percent is used by the bakery sector. Sources report that these industries prefer NFDM as it is easier to use in the preparation of a number of products.

**Stocks:**

LICONSA used to be the largest owner of milk powder stocks. Due to industry pressure, however, LICONSA switched to purchasing domestic fluid milk and has reduced its consumption of NFDM and its need to maintain stocks.

**Production, Supply and Demand Data Statistics:**

Dairy, Milk, Nonfat Dry Mexico	2010		2011		2012	
1000 MT	Market Year Begin: Jan 2010		Market Year Begin: Jan 2011		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	0	0	0	0	0	0
Production	13	13	13	13	13	13
Other Imports	155	155	180	194	170	190
Total Imports	155	155	180	194	170	190
Total Supply	168	168	193	207	183	203
Other Exports	0	0	0	0	0	0
Total Exports	0	0	0	0	0	0
Human Dom. Consumption	168	168	193	207	183	203
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	168	168	193	207	183	203
Total Use	168	168	193	207	183	203
Ending Stocks	0	0	0	0	0	0
Total Distribution	168	168	193	207	183	203

**Commodities:**

Dairy, Dry Whole Milk Powder

**Production:**

The Post MY2012 dry whole milk powder (WMP) production forecast is unchanged from the USDA forecast and remains the same as the MY2011 estimate. This is due to reduced fluid milk availability. The Post estimate for MY2011 and MY2010 total dry WMP production figures are unchanged from the USDA estimates. As previously reported, LICONSA continues purchasing domestic fluid milk, thus,

lowering demand for dry WMP production. As previously stated, the production of WMP depends on the availability of fluid milk, especially, the seasonal surplus of fluid milk.

**Consumption:**

Dry WMP consumption for MY2012 is unchanged from the USDA forecast as consumer purchasing power recovery is allowing middle and high-income consumers to buy processed and added-values dairy products instead of products with WPM. The Post MY2011 estimate was revised upward slightly from the USDA estimate as middle and high-income consumers had not started to migrate to other products as anticipated. Low-income consumers are the traditional market covered by LICONSA and rehydrated milk made from WMP. The Post MY2010 consumption estimate remains unchanged from USDA estimate.

**Trade:**

The Post MY2012 import estimate remains unchanged from the USDA forecast of 25,000 MT. Although LICONSA has been switching to buying and supplying fluid milk, the demand for dairy products from low-income consumers led to slightly higher imports for dry WMP and resulted in a slight increase in the Post MY2011 estimate from the USDA estimate. MY2010 figures remain unchanged.

**Production, Supply and Demand Data Statistics:**

Dairy, Dry Whole Milk Powder Mexico	2010		2011		2012	
1000 MT	Market Year Begin: Jan 2010		Market Year Begin: Jan 2011		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	0	0	0	0	0	0
Production	173	173	168	168	168	168
Other Imports	15	15	27	30	25	25
Total Imports	15	15	27	30	25	25
Total Supply	188	188	195	198	193	193
Other Exports	7	7	7	8	7	7
Total Exports	7	7	7	8	7	7
Human Dom. Consumption	181	181	188	190	186	186
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	181	181	188	190	186	186
Total Use	188	188	195	198	193	193
Ending Stocks	0	0	0	0	0	0
Total Distribution	188	188	195	198	193	193

**Commodities:**

Dairy, Milk, Fluid

Dairy, Cheese

Dairy, Butter

Dairy, Milk, Nonfat Dry

Dairy, Dry Whole Milk Powder

**Policy:**

**General Tariffs**

Currently, all U.S. dairy product exports enter Mexico duty-free.

**NOM-155-SCFI-2012 & NOM-183-SCFI-2012**

On May 3, 2012 the Secretariat of Economy (SE) published in Mexico's Federal Register (*Diario Oficial*) the Mexican Official Norms NOM-155-SCFI "Milk-Denomination, physical-chemical specifications, commercial information and testing methods" and NOM-183-SCFI-2012 "Dairy formula and combined dairy formula-Denomination, physical-chemical specifications, commercial information and testing methods". These NOMs replace NOM-155-SCFI-2003, and encompass milk, dairy formulas, and combined dairy formulas in an effort to eliminate possible consumer confusion. The National Chamber of Milk Industries (CANILEC) has expressed dissatisfaction with this revised regulation as they perceive this modification is unnecessary and over-regulates the industry and will affect self-service stores that produce and sell their own brands. This, in turn, could affect the entire industry and increase production costs.

**Marketing:**

It is worth noting that Mexico became the first U.S. \$1 billion market for U.S. dairy and related product exports in 2011. Total U.S. dairy product exports were approximately \$1.2 billion. NFD, cheese, and whey accounted for the bulk of the export values and amounted to approximately \$600 million, \$200 million, and \$130 million, respectively. Through the first 3 months of 2012, year over year [export values](#) are considerably higher than last year and suggest promising opportunities for U.S. dairy products throughout the year. The United States exported \$313 million of dairy products in the first 3 months of 2012 compared to \$240 million for the first 3 months of 2011.

The Mexican dairy industry is beginning to invest in publicity and promotion for added-value dairy products. These products, according to industry sources, require lower levels of raw material for their preparation and are more affordable. As such, industry members believe marginal promotion efforts could spur consumption of these products.

In 2010, the total dairy products (UHT and pasteurized fluid milk, cheese, yoghurt, cream, chilled dairy snacks, and condensed/evaporated milk) market size was estimated at U.S. \$9.65 billion. The industry is considered highly fragmented with a large number of small-scale artisan producers that distribute products locally or regionally. Fluid milk and added-value product processing is dominated by two brands; Lala and Alpura.

The U.S. Dairy Export Council (USDEC) is active in promoting the U.S. dairy industry in Mexico. In addition, the Foreign Agricultural Service (FAS) Agricultural Trade Offices (ATOs) promote U.S. dairy exports, as well. The ATOs and USDEC develop promotion and sales opportunities for U.S. dairy products in the Mexican market. USDEC, as well, organizes buying missions for potential Mexican importers/distributors to visit U.S. suppliers.

**Author Defined:**

**For More Information**

FAS/Mexico Web Site: We are available at [www.mexico-usda.com](http://www.mexico-usda.com) or visit the FAS headquarters' home page at [www.fas.usda.gov](http://www.fas.usda.gov) for a complete selection of FAS worldwide agricultural reporting.

**For further information, direct marketing questions to:**

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MX2016	Livestock and Products Semi-Annual	3/21/2012
MX1106	Dairy Blends TRQ Announced	12/30/2011
MX1105	Milk Powder TRQ Announced	12/30/2011
MX1092	New Meat and Poultry Letterhead Certificates Required	12/6/2011
MX1083	Dairy and Products Annual	11/14/2011
MX1076	Mexico Eliminates Retaliatory Tariffs	10/21/2011

**Useful Mexican Web Sites:** Mexico's equivalent to the U.S. Department of Agriculture (SAGARPA) can be found at [www.sagarpa.gob.mx](http://www.sagarpa.gob.mx), equivalent to the U.S. Department of Commerce (SE) can be found at [www.economia.gob.mx](http://www.economia.gob.mx) and equivalent to the U.S. Food and Drug Administration (SALUD) can be found at [www.salud.gob.mx](http://www.salud.gob.mx). These web sites are mentioned for the readers' convenience but USDA does NOT in any way endorse, guarantee the accuracy of, or necessarily concur with, the information contained on the mentioned sites.