

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY  
USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT  
POLICY

Required Report - public distribution

**Date:** 5/24/2013

**GAIN Report Number:** MX3042

## **Mexico**

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

#### **Production and Consumption Growing with Record Trade**

**Approved By:**

Daniel K. Berman

**Prepared By:**

Gabriel Hernandez, Vanessa Salcido, and Adam Branson

**Report Highlights:**

Dairy production continues growing with anticipated lower feed prices and improved genetics despite challenges that have reduced the number of operators and herd sizes for the past several years. Consumption is increasing as upper-income consumers demand higher-value products and subsidies lower costs for other consumers. The United States exported record values and volumes of dairy ingredients to Mexico in 2012 which exceeded \$1.2 billion and are on pace for another strong year in 2013.

## Commodities:

Dairy, Milk, Fluid

## Production:

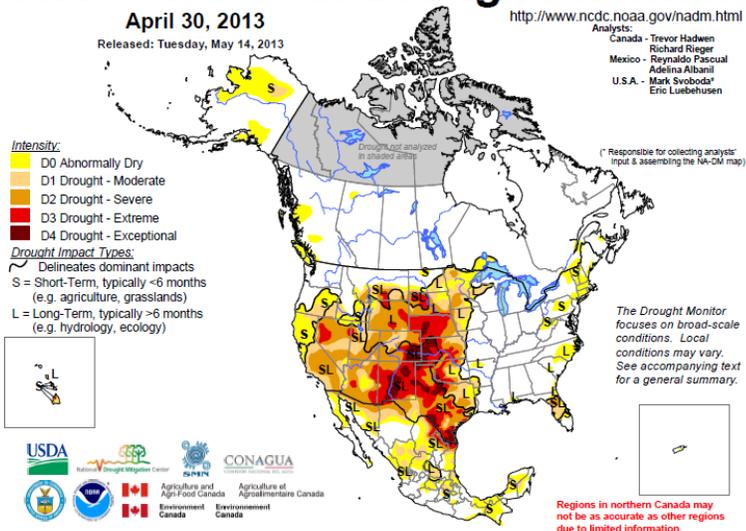
The new Post MY2013 (January to December) fluid milk production forecast is 11.4 million metric tons (MMT) based upon updated official data from Mexico's Secretariat of Agriculture, Livestock, Rural Development, Fishery and Food (SAGARPA). Better production practices, improved genetics, and price incentives from the government are helping increase production. The Post fluid milk production estimate for MY2012 is revised upward from the USDA estimate to 11.4 MMT based on official data and the same above factors of better genetics from greater yielding milk cows and improved production practices among vertically integrated large producers. The Post fluid milk production estimate for MY2011 is unchanged.

## Milk Producers Looking for Water Use Efficiency

The forecast of increasing global grain production levels during MY2013 along with lower domestic grain prices has allowed producers to focus on other important input costs. The availability of water in confinement establishments and the lack of suitable grazing pasture — mainly in northern Mexico due to the prevailing drought (see image, below) — have become increasingly important issues for the dairy sector to address. Industry leaders are encouraging milk producers to improve efficiencies and use better and newer technologies to pump water from wells so as to lower unit costs.

Image 1. Mexico: North American Drought Monitor through April 30, 2013

## North American Drought Monitor



## Better Herd Genetics and Resizing of Herds

As was the case in MY2012, producers in MY2013 are continuing to decrease herd sizes by sending milk cows to slaughter for meat as it is more profitable than retaining them for milk production. Private sources indicate that the total number of milk producers number around 200,000 and that the industry is continuing to struggle with input costs and water scarcity. Given that small and medium-sized producers are reducing herd sizes or exiting the industry, MY2013 production levels will depend upon continued introduction of better herd genetics in vertically integrated farms.

### Milk Cow Numbers

There is no change to the MY2013, MY2012, or MY2011 milk cow forecast or estimates. Continued sales price challenges and input price pressures could, however, force producers to reduce herds further than anticipated in 2013 and will need to be monitored.

Table 1. Mexico: Total fluid milk production by State, calendar year 2006-2012, (Volume: Thousand Liters).

	2006	2007	2008	2009	2010	2011	2012*
AGUASCALIENTES	383,658	375,401	370,399	367,171	369,253	372,252	369,599
BAJA CALIFORNIA	166,868	207,915	193,422	179,795	174,027	181,190	159,231
BAJA CALIFORNIA SUR	44,634	43,150	46,451	46,104	44,323		
CAMPECHE	34,241	35,517	35,029	36,271	36,146	41,144	40,566
COAHUILA	1,247,356	1,286,281	1,363,762	1,282,618	1,243,058	1,275,065	1,287,918
COLIMA	39,039	36,146	36,525	32,349	34,883	36,059	35,548
CHIAPAS	327,138	353,085	372,249	366,393	385,455	402,583	402,727
CHIHUAHUA	808,641	817,919	926,222	923,053	934,928	930,020	979,502
DISTRITO FEDERAL	13,138	10,058	12,322	13,652	13,643	13,784	12,678
DURANGO	1,014,535	1,019,227	1,036,581	959,716	1,001,137	997,155	1,037,913
GUANAJUATO	673,007	674,660	684,202	761,759	775,108	784,770	789,760
GUERRERO	81,868	82,001	81,552	84,157	86,892	83,764	88,809
HIDALGO	445,465	460,773	452,977	439,361	419,273	398,540	364,018
JALISCO	1,697,486	1,793,579	1,855,362	1,900,343	1,960,999	1,991,577	2,024,968
MEXICO	476,231	478,211	464,573	464,704	478,261	482,082	468,734
MICHOACAN	328,404	328,185	329,079	331,909	331,038	339,389	350,057
MORELOS	18,551	21,105	18,809	20,901	21,784	20,890	22,421
NAYARIT	64,506	64,536	61,974	60,130	60,742	60,104	55,779
NUEVO LEON	39,473	41,432	39,909	40,586	40,397	37,790	38,622
OAXACA	140,720	142,795	145,213	146,406	147,080	147,933	147,348
PUEBLA	367,963	384,707	384,285	395,211	403,100	404,132	425,768
QUERETARO	198,488	200,835	195,791	192,435	192,422	195,147	336,644
QUINTANA ROO	5,250	5,642	5,623	5,829	5,921	5,562	6,128
SAN LUIS POTOSI	147,591	140,630	141,828	132,285	130,899	128,772	125,820
SINALOA	82,067	88,633	93,779	95,943	102,081	105,875	103,507
SONORA	142,052	137,780	134,921	126,496	129,355	112,055	110,764
TABASCO	115,617	110,603	110,694	111,533	111,416	101,522	106,960
TAMAULIPAS	31,520	29,224	30,209	32,326	30,242	29,666	28,242
TLAXCALA	99,158	110,258	110,924	120,356	115,223	109,978	109,952
VERACRUZ	681,809	692,754	697,288	708,230	722,465	723,106	717,290
YUCATAN	6,769	5,557	5,608	4,366	3,441	3,153	3,009
ZACATECAS	165,309	167,383	163,293	166,655	171,703	172,867	159,310
TOTAL	10,088,551	10,345,982	10,498,994	10,549,038	10,676,691	10,724,288	10,946,015

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

\*SAGARPA's preliminary figures for 2012

### Consumption:

The Post MY2013, total fluid milk consumption estimate (domestic and factory use) is revised upward to almost 11.5 MMT as the industry forecasts sustained consumption of added-value products for middle and upper income consumers with sustained support from LICONSA for lower income consumers. The Post MY2012 total fluid milk consumption estimate was revised upward, as well, from the USDA estimate due to official Mexican data. The estimate for MY2011 is unchanged.

### **Mexico's Population Demographics Influence Dairy Product Consumption**

For MY2012 and MY2013 it is important to note the trade-offs between fluid domestic consumption and factory use. As previously reported, consumers continue switching to other prepared and processed dairy products such as yoghurts and other preparations that offer attractive prices, a full range of flavors, a longer shelf life, and nutritional and functional benefits.

Fluid milk continues to be the strongest pillar of dairy consumption. Despite the appearance of new products (e.g., diverse categories of specialty dairy products for infants, youth, and elder consumers), private sources anticipate a slight increase in the consumption of low-priced milk targeting low-income populations.

The increased consumption of added value dairy products such as pasteurized milk, sweetened milk, yoghurts, cheeses as well as of ultra high temperature (UHT) milk is an ongoing trend given that the sector is responding to the needs of consumers. Consumers, both younger and elder, are seeking innovative products that offer functional as well as nutritional benefits. The dairy industry is responding to the increased demand for specialized products, such as lactose-free products, high-calcium, and even light or low-fat milk products. Consequently, specialized dairy products continue gaining domestic market share and greater volumes of fluid milk is being directed to processing use.

Industry sources estimate that Mexico has a domestic milk production deficit of around 30 percent as Mexicans are now consuming more milk or dairy products on a per capita basis. Also, the industry is witnessing some consumption shifts (i.e., increased recognition of milk's nutritional benefits), population growth, and increased purchasing power. These continued trends driving consumption should encourage a production response.

As previously reported, 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's per capita consumption in 2012 was 132 liters per year of fluid milk or 363 milliliters per day. Experts point out that this is far below the World Health Organization (WHO) recommendation of at least 500 milliliters per day and are trying to push demand accordingly.

### **A Crusade for Better Nutrition for Low-Income Consumers**

LICONSA recently announced that in compliance with the Government of Mexico (GOM) "Crusade Against Hunger" strategy (See MX3005), which establishes objectives and measures to help alleviate hunger and poverty, it will focus on increasing demographic coverage of the "Social Supply" of milk through agreements with public and private institutions. More specifically, LICONSA will try to address the needs of the population aged between 6 months and 5 years that live subject to "hunger" conditions.

As previously reported, LICONSA, in response to the GOM efforts to reduce the prevailing high rates of those who are overweight or obese in the infant population, reduced the amount of dairy fat in products that it supplies to the lowest-income sectors of the population. LICONSA eliminated 50 percent of the fat content in its fluid milk and powdered milk products while attempting to maintain the nutritional content equal to its whole milk products.

NOTE: 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.” END NOTE.

**Prices:**

On October 9, 2011, LICONSA announced a 0.60 pesos (U.S. \$0.04) per liter increase to the price paid to producers for a final price of 5.60 pesos (USD \$0.42) per liter. This agreement was applied from the beginning of 2012 and it has continued as of the beginning of 2013. 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). This price is maintained in 2013.

Recently, LICONSA declared that an increase to the 2013 authorized budget must be granted in order to maintain prices for both producers and consumers during 2013.

**Trade:**

Mexico remains a milk production deficit nation and will continue to be an attractive market for U.S. dairy and dairy product exporters. Although the domestic industry has been observing steady production growth, imports remain a necessity and the United States will remain the primary foreign supplier of milk to Mexico.

Given recent increases in international milk prices, the Post fluid milk import estimate for MY2013 remains 43,000 MT; unchanged from the USDA official estimate. The Post MY2012 and MY2011 fluid milk import estimates reflect recent data and remain unchanged from the USDA estimates of 39,000 MT and 38,000 MT; respectively.

The Post MY2013 fluid milk export estimate is maintained at 11,000 MT, mainly due to the fact that Mexico remains in a supply deficit. Post’s new MY2012 estimate was revised downward to 13,000 MT based on official data and the reduced availability of milk for export as more was used in the preparation of added-value products. MY2011 exports remain unchanged.

**Stocks:**

No stocks are held due to the lack of refrigeration or 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	2011		2012		2013	
	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: Jan 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Cows In Milk	6,400	6,400	6,350	6,350	6,300	6,300
Cows Milk Production	11,046	11,046	11,153	11,274	11,150	11,270
Other Milk Production	167	167	159	160	159	152
Total Production	11,213	11,213	11,312	11,434	11,309	11,422
Other Imports	38	38	39	39	43	43
Total Imports	38	38	39	39	43	43

<b>Total Supply</b>	11,251	11,251	11,351	11,473	11,352	11,465
<b>Other Exports</b>	10	10	14	13	11	11
<b>Total Exports</b>	10	10	14	13	11	11
<b>Fluid Use Dom. Consum.</b>	4,100	4,100	4,168	4,168	4,171	4,171
<b>Factory Use Consum.</b>	7,141	7,141	7,169	7,292	7,170	7,283
<b>Feed Use Dom. Consum.</b>	0	0	0	0	0	0
<b>Total Dom. Consumption</b>	11,241	11,241	11,337	11,460	11,341	11,454
<b>Total Distribution</b>	11,251	11,251	11,351	11,473	11,352	11,465
1000 HEAD, 1000 MT						

**Commodities:**

Dairy, Cheese

**Production:**

The Post MY2013 total cheese production forecast for MY2013 is maintained at 270,000 MT as production levels reflect the sustained demand for aged cheeses and fresh cheese products. The Post MY2012 production estimate was revised slightly downward from the USDA official estimate as less fluid milk was available for cheese production as it was directed to other added-value products and imports were able to meet demand. The MY2011 production estimate was kept unchanged from the USDA estimate to reflect available data.

**Consumption:**

The Post MY2013 total cheese consumption forecast is unchanged from the USDA official forecast as consumption of aged cheeses among high-middle and high-income consumers remained stable. Moreover, low and lower-middle income consumers continued demanding fresh cheese products. The MY2012 consumption estimate was revised slightly downward from the USDA estimate reflecting industry data that suggests other dairy products are an increasingly important component of the diet of middle-income consumers. The Post MY2011 consumption estimate is unchanged from the USDA estimate.

**Trade:**

The Post MY2013 cheese import forecast is kept unchanged from the USDA forecast. The Post import estimate for MY2012 was revised marginally downward from the USDA estimate reflecting trade data. MY2011 figures remain unchanged.

The Post MY2013, MY2012, and MY2011 cheese export estimates are unchanged from the USDA estimates.

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

Dairy, Cheese Mexico	2011		2012		2013	
	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: Jan 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post

<b>Beginning Stocks</b>	0	0	0	0	0	0
<b>Production</b>	270	270	270	264	270	270
<b>Other Imports</b>	78	78	90	89	92	92
<b>Total Imports</b>	78	78	90	89	92	92
<b>Total Supply</b>	348	348	360	353	362	362
<b>Other Exports</b>	4	4	4	4	4	4
<b>Total Exports</b>	4	4	4	4	4	4
<b>Human Dom. Consumption</b>	344	344	356	349	358	358
<b>Other Use, Losses</b>	0	0	0	0	0	0
<b>Total Dom. Consumption</b>	344	344	356	349	358	358
<b>Total Use</b>	348	348	360	353	362	362
<b>Ending Stocks</b>	0	0	0	0	0	0
<b>Total Distribution</b>	348	348	360	353	362	362
1000 MT						

### **Commodities:**

Dairy, Butter

### **Production:**

The Post MY2013 butter production forecast is maintained unchanged at 185,000 MT as strong demand from the processing industry for the preparation of other products is expected to compete for the availability of fluid milk for butter production. The Post MY2012 and MY2011 estimate for butter production is unchanged from the USDA estimate.

### **Consumption:**

The new Post MY2013 butter and butterfat consumption forecast is at similar levels from the MY2013 USDA official forecast as use by the bakery and confectionary sectors is expected to be maintained. During MY2013, the baking, confectionary and food processing industries use of butter and butterfat is expected to remain relatively stable and the slight shortfall will be met with imports. The Post estimate for MY2012 was revised marginally downward due to limited availability and reduced imports. The MY2011 estimate is unchanged from the USDA estimate.

### **Trade:**

The Post MY2013 import of butter and butterfat is maintained at 45,000 MT due to sustained demand from the bakery and confectionary sectors and limited domestic production. The Post MY2012 import estimate was revised downward due to recent available trade data reflecting a decrease in imports. The import estimate for MY2011 is unchanged from the USDA estimate.

As in MY2012, New Zealand will continue to be the principal supplier of butter or butterfat to Mexico for MY2013. The United States is forecast to maintain its market share.

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

<b>Dairy, Butter Mexico</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
-----------------------------	-------------	-------------	-------------

	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: Jan 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	0	0	0	0	0	0
Production	187	187	190	190	185	185
Other Imports	36	36	40	37	45	45
Total Imports	36	36	40	37	45	45
Total Supply	223	223	230	227	230	230
Other Exports	0	0	0	0	0	0
Total Exports	0	0	0	0	0	0
Domestic Consumption	223	223	230	227	230	230
Total Use	223	223	230	227	230	230
Ending Stocks	0	0	0	0	0	0
Total Distribution	223	223	230	227	230	230
1000 MT						

### Commodities:

Dairy, Milk, Nonfat Dry

### Production:

The production forecast of Non-fat Dry Milk (NFDM) for MY2013 is revised significantly upward from the USDA official forecast. SAGARPA is forecasting a significant increase due to anticipated seasonal fluid milk production surpluses and the ability of the fully operational NFDM plant in the state of Jalisco to manage those supplies. Traditionally, NFDM is only manufactured in substantial volumes when there is a seasonal (i.e., rainy season) overproduction of fluid milk. Also, the new Post production estimate for MY2012 was revised significantly upward from the USDA official estimate based on preliminary figures from SAGARPA that reflect the processing of seasonal surpluses into NFDM.

MY2011 estimates were revised upwards, as well, based on official information from SAGARPA.

### Consumption:

The Post NFDM MY2013 consumption forecast is revised substantially upward to 291,000 MT as increased production volumes will create affordable prices and strong industry demand for use in the processing of other added-value products. LICONSA has created branch locations for the production and distribution of processed milk (UHT whole, nonfat and light) which has increased consumption.

The Post consumption estimate for MY2012 was revised significantly upward for the above-mentioned reasons. The Post consumption estimate for MY2011 was revised upward from the USDA estimate as new data from SAGARPA became available.

As previously reported, industry sources report that the principal consumers of NFDM are dairy processors who reconstitute the material and sell it as pasteurized or UHT milk. Also, the confectionary industry continues using small quantities of NFDM in their processes.

### Trade:

The Post MY2013 import forecast for NFDM is 236,000 MT up 4.8 percent up from the official USDA forecast as even with Mexico's increased production, it is still not sufficient to cover industry demand. MY2012 import figures were revised upward based on official data and MY2011 estimates remain unchanged from the USDA estimate.

**Stocks:**

LICONSA used to be the largest owner of NFDM stocks. Due to the implementation of the Acquisition of Domestic Milk Program, LICONSA switched to purchasing domestic fluid milk and has reduced its consumption of NFDM and need to maintain stocks.

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

Dairy, Milk, Nonfat Dry Mexico	2011		2012		2013	
	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: Jan 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	0	0	0	0	0	0
Production	13	26	12	55	13	55
Other Imports	194	194	225	236	225	236
Total Imports	194	194	225	236	225	236
Total Supply	207	220	237	291	238	291
Other Exports	0	0	0	0	0	0
Total Exports	0	0	0	0	0	0
Human Dom. Consumption	207	220	237	291	238	291
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	207	220	237	291	238	291
Total Use	207	220	237	291	238	291
Ending Stocks	0	0	0	0	0	0
Total Distribution	207	220	237	291	238	291
1000 MT						

**Commodities:**

Dairy, Dry Whole Milk Powder

**Production:**

The Post MY2013 dry WMP production forecast is revised significantly downward compared to USDA official figures. During 2012, as stated earlier, LICONSA announced that it would reduce the amount of dairy fat in its products in compliance with the GOM efforts to reduce the prevailing high rates of children and infants who are overweight or obese. Sources report this change contributed to decreased production. The MY2012 figure was revised downward due to the same factors. The Post estimate for MY2011 total dry WMP production is unchanged.

**Consumption:**

Dry WMP consumption forecasts for MY2013 and estimates for MY2012 were revised downward compared to the USDA official figures as consumer purchasing power recovery has allowed middle and high-income consumers to buy processed and added-values dairy products instead of products made

with WPM. In addition, consumer health interests may have contributed to lower consumption.

However, the use of WPM is still a prevailing practice among low-income urban households that lack refrigeration and therefore limit purchases of fresh milk products. Low-income consumers are the traditional market covered by LICONSA and rehydrated milk made from WPM. The Post MY2011 consumption estimate was kept unchanged from the USDA estimate.

**Trade:**

The new Post MY2013 import forecast is revised downward from official USDA data to 12,000 MT as LICONSA, once the main importer, continues trying to purchase domestic milk rather than imported WPM. Similarly, for MY2012, the import figures were revised downward as a result of LICONSA’s continued purchase of domestic fluid milk. MY2011 figures remain unchanged.

While being a net importer, Mexico’s exports of WPM during MY2011 were small and stable. This trend is not likely to change in MY2013. Moreover, private sources indicate that the dairy industry is strong and capable of increasing their export capacity for WPM, but that the limited availability of fluid milk is an obstacle. MY2013 and MY2012 export estimates were revised downward based on the lack of fluid milk for production into WPM.

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

Dairy, Dry Whole Milk Powder Mexico	2011		2012		2013	
	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: Jan 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	0	0	0	0	0	0
Production	168	168	168	150	168	150
Other Imports	30	30	15	9	15	12
Total Imports	30	30	15	9	15	12
Total Supply	198	198	183	159	183	162
Other Exports	8	8	7	5	7	5
Total Exports	8	8	7	5	7	5
Human Dom. Consumption	190	190	176	154	176	157
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	190	190	176	154	176	157
Total Use	198	198	183	159	183	162
Ending Stocks	0	0	0	0	0	0
Total Distribution	198	198	183	159	183	162
1000 MT						

**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 products enter Mexico duty-free.

**Marketing:**

U.S. dairy exports to Mexico reached more than one billion dollars for a second consecutive year and surpassed \$1.2 billion in 2012. Mexican imports of dairy products from the United States increased by 7 percent. The U.S. is the main foreign supplier of dairy products in the market with 73 percent of imported product market share in 2012.

The production deficit discussed earlier implies that there is an annual demand for around 600,000 MT of imported dairy products and dairy ingredients. As the Mexican food industry continues growing, so too has the demand for dairy products. The food processing sector grew by 6 percent in 2012 and the retail and food service sectors continue to grow, as well. Strong investments in these sectors have increased the demand for dairy products, like fluid milk, cheese, yogurt and dairy ingredients.

Mexico is considered a price sensitive market for dairy products. In 2012 Mexico imported a total of 66,215 MT of U.S cheese, a 28 percent increase from the previous year. The U.S. is the biggest supplier of imported cheeses with 71.5 percent market share. Imports of U.S. fluid milk decreased around 11 percent from the previous year due to higher prices. The U.S. still remains the main supplier of imported milk, however, with a 94 percent market share. Total volume of other U.S. dairy ingredients reached 300,185 MT in 2012, increasing 10 percent over the last year. The product with the largest volume from the U.S. was skimmed milk powder (204,178 MT), followed by whey ingredients (69,521 MT), and others.

**Dairy Product Trends**

- Consumers are expected to shift towards more sophisticated cheeses (imported types such as Brie, Camembert, Roquefort, Gruyere, etc.) with higher unit prices.
- Both Ultra Pasteurized-UHT milk and fresh/pasteurized milk have a positive perception among consumers in terms of freshness and quality; however UHT milk is seeing stronger volume growth because it is considered to be more practical.

The U.S. Dairy Export Council (USDEC) is active in promoting the U.S. dairy industry in Mexico.

USDEC organizes buying missions for potential Mexican importers/distributors, to visit the United States and is available, contact information below, to provide additional information on the market in Mexico.

**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:**

U.S. Dairy Export Council (USDEC)

Circuito Médicos No. 55 Interior 302  
 Ciudad Satélite, Naucalpan,  
 Estado de México, 53100 México  
<http://www.usdec.org>

Agricultural Trade Office, Mexico City  
 Liverpool 31, Col. Juarez  
 C.P. 06600 México, D.F.  
 Phone: (011-52-55) 5140-2600  
[atomexico@fas.usda.gov](mailto:atomexico@fas.usda.gov)  
<http://www.mexico-usda.com>

Agricultural Trade Office, Monterrey  
 Blvd. Diaz Ordaz No. 140, Torre 2, Piso 7  
 Col. Santa Maria  
 C.P. 64650 Monterrey, Nuevo Leon  
 (011-52-81) 8333-5289  
[atomonterrey@fas.usda.gov](mailto:atomonterrey@fas.usda.gov)  
<http://www.mexico-usda.com>

**Other Relevant Reports Submitted by FAS/Mexico:**

<b>Report Number</b>	<b>Subject</b>	<b>Date Submitted</b>
MX3005	Mexico Pushes Crusade Against Hunger Campaign	1/29/2013
MX2097	Milk Powder TRQ Announced – Little Effect on U.S. Forecast	12/21/2012
MX2096	Dairy Blends TRQ Announced – Little Effect on U.S. Forecast	12/21/2012
MX2074	Dairy and Products Annual – High Input Prices Continue to Pressure Domestic Production	10/26/2012
MX2031	New NOMS for Dairy Products May Shift Import Patterns	5/16/2012
MX2028	Dairy and Products Semi-Annual	5/14/2012
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.

