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Mexico

Livestock and Products Semi-annual

Production Forecasts Raised Slightly on Better Genetics, Weather and Feeding

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Report Highlights:

Mexican beef and pork production forecasts are slightly higher in 2014 as affordable grain prices and improved climate conditions are helping the sector continue to recover. Import demand for U.S. beef and pork is expected to remain strong as U.S. prices are competitive and exports could be trimmed back as domestic consumers appear to have a greater willingness to pay for product in competition with export markets.

Commodities:

Animal Numbers, Cattle

Meat, Beef and Veal

Production:**2014 and 2013 Beef Production Forecast and Estimate Raised Marginally Higher**

The new Post 2014 Mexican beef production forecast is 1.820 million metric tons (MMT) carcass weight equivalent (CWE), slightly greater than the 2014 official USDA forecast of 1.795 MMT, as continued improvements in feeding practices and genetics are contributing to better weight gains and carcass yields. Mexican industry members continue sourcing animals with better feed conversion to place into northern Mexico's intensive production systems as a means to lower overall feeding costs. Also, the 2012 drought remains an important factor that has pushed cattlemen to select the best calves and heifers for breeding and feeding purposes. This is helping to increase calf production birth rates and leading to better live animal and carcass weights. Moreover, the Mexican government cattle herd repopulation plan (see MX3077) is being implemented in tropical regions and producers seem receptive to carrying out the program. All of these factors should continue to spur steady medium and long-term growth in the beef and cattle sector.

Post's 2013 production estimate is revised upward from the 2013 USDA official estimate as preliminary official figures from the Secretariat of Agriculture, Livestock, Rural Development, Fishery and Food (SAGARPA) are now available. The increase suggests effective adjustments in feeding practices and in breeding cattle selection.

Post's 2012 production is unchanged based on official information from SENASICA-SAGARPA which is in charge of Mexico's federally inspected (i.e., TIF) beef slaughter facilities.

Evolving and Improving Cattle Production Practices Should Build Production in Cattle Head and Weights.

As mentioned above, cattlemen are looking to retain their best genetics to improve upon Mexico's low breeding rate of 1 calf every 2 years. Also, better nutrients in feed rations (i.e., a larger percentage of grains and less dry forage) should improve cattle productivity. If successful, these two measures should not only safeguard domestic production but bolster it in a manner that eventually would allow the Mexican cattle sector to return to traditional calf exports and customary slaughter levels by the end of 2014.

Pasture lands are returning to almost normal conditions in central and southern Mexico allowing cattle to return to these lands for grazing. In northern Mexico, feed lot programs are continuing to grow as international grain prices are attractive and should lower beef production costs. As such, slaughter and carcass weights have moved upward since late 2013 and are expected to move even higher in 2014.

The cattle sector is optimistic that these improving and evolving practices will permit cattle inventory recovery in the coming years. As such, Post's new 2014 cattle ending inventory forecast is increased over the official 2014 USDA forecast. The 2013 cattle ending inventory is increased, as well, for the optimism and growth seen in the industry as there was less loss and more incentive to retain and feed animals.

Consumption:

The new Post 2014 total domestic beef consumption estimate is 1.87 MMT which is slightly higher than the official USDA forecast as population growth, reasonable prices, availability of international supplies and diversion of some domestic supplies from exports to local markets should edge overall beef consumption greater.. Post's new 2013 beef consumption estimate is 1.858 MMT slightly higher than the official USDA estimate due to similar reasons (i.e., increasing production and reduced exports). Consumption estimates for 2012 remain unchanged.

Flat Per Capita Consumption Now...

Post's 2014 forecast and 2013 estimated consumption levels suggest that per capita consumption remains relatively stable between 15 and 16 kilograms per person. Industry sources echo this sentiment and site that higher production costs as well as reduced disposable income in mid and mid-low income households has led to shifting consumption patterns. Industry members suggest that both pork and poultry and processed products (e.g., sausages with fillers) increasingly have been substituted for beef in recent years.

... To Improve as Consumers Value Quality, Safety, and Wholesomeness...

However, the mid to long-term government project to convert all slaughter houses into TIF establishments could spur consumption. In 2005, 32 percent of the meat consumed in Mexico was processed in a TIF-type establishment whereas in 2013, this figure was reported to be 51 percent. Increasingly, it seems, consumers are becoming aware of the health and food safety benefits that TIF establishments offer as well as the established retail and hypermarkets that these TIF establishments supply.

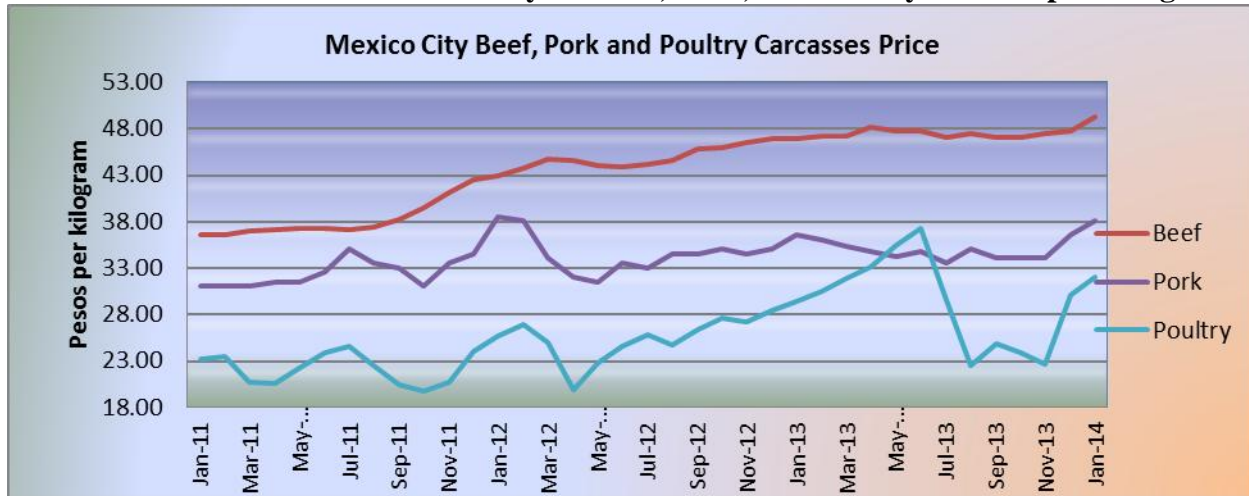
... Of Established Retail Chains with Volume Discounts and Lower Operating Costs That Could Enable Per Capita Consumption to Rise.

Industry sources believe that consumers have a misconception regarding where to find the best beef prices. Many families still purchase beef at local butcher shops or wet markets and not in supermarkets. Commonly, these butcher shops and wet markets have limited warehouse capacity and, although great in number, only move one carcass a week. These low volumes and the need to move all parts of the animal leads to increased costs that is often passed onto the consumer. The alternative to these markets are modern chain stores that can warehouse and distribute large quantities of beef at affordable prices. For example, one source reported that the price of lean meat "*bistec*" can reach 100 pesos per kg (~U.S. \$7.56 per kg) in butcher shops whereas in chain stores, given the large volumes that they handle, can offer the same cut at a price that is 30 percent lower.

Prices and Per Capita Consumption

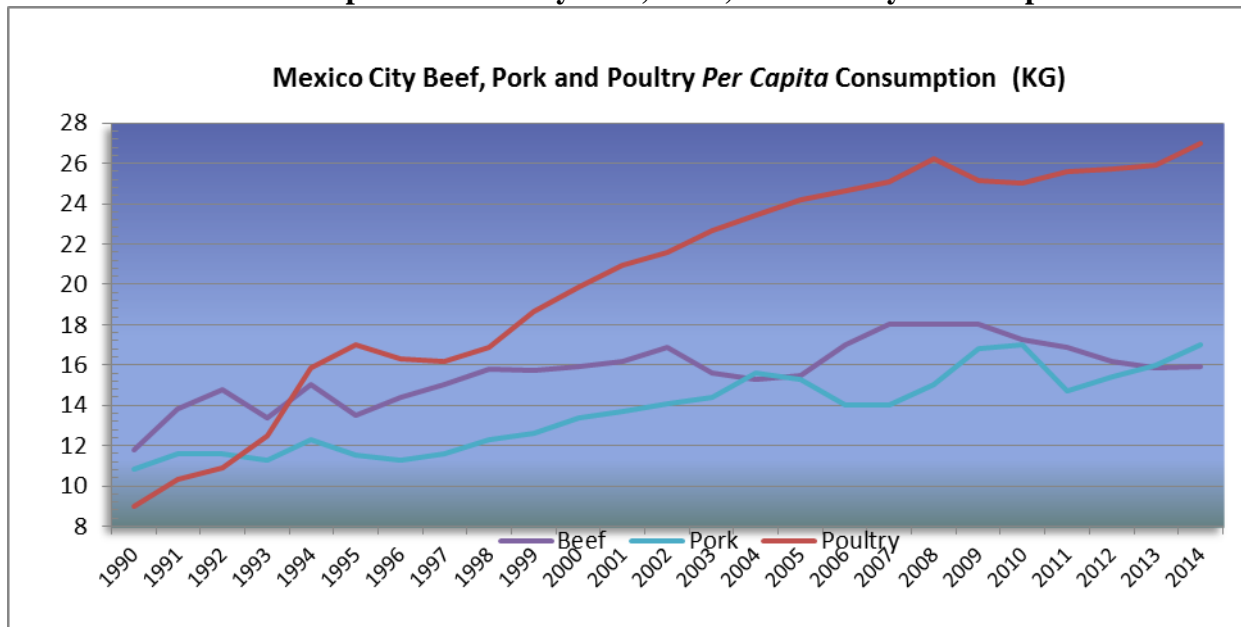
In 2013, pork prices averaged 34.87 pesos per kg (~U.S. \$1.18 per lb.) and beef prices averaged 47.36 pesos per kg (non-fine cuts at ~U.S. \$1.60 per lb.). During 2013, prices for pork and beef increased and consumption levels remained relatively flat.

Chart 1: Mexico: Prices in Mexico City for Beef, Pork, and Poultry in Pesos per Kilogram



Source: SNIIM, Comentarios de Mercados Pecuarios. <http://www.economia-sniim.gob.mx/nuevo/>

Chart 2: Mexico: Per Capita Mexico City Beef, Pork, and Poultry Consumption



Source: AMEG, CMP, UNA, SIAP-SAGARPA.

Trade:

Post forecasts Mexico's 2014 beef imports unchanged from USDA's official forecast of 235,000 MT CWE. Post's 2013 beef import estimate is lowered marginally to 220,000 MT CWE based on trade data. Limited supplies/higher prices from the United States along with higher weights for Mexican domestic cattle and the closure of the Russian market for Mexican exports (i.e., less need for

replacement product) are all likely causes that Post believes led to lower import demand in 2013. Post's 2012 beef import estimate is unchanged and based on official data.

The improved quality, food safety, and sophistication of Mexican beef operations has opened doors for increased and targeted Mexican beef exports over the past several years. Post's 2014 Mexican beef export forecast is 185,000 MT CWE and its 2013 estimate is 170,000 MT CWE. The revision to 2013 is based on available trade data which likely accounts for the loss of the Russian market for part of the year and the higher costs of certifying product to Russia which curbed incentive to export there as better prices were found within Mexico. As demand within Mexico grows and beef supplies remain tight, 2014 exports could also be lower than the official USDA forecast as reflected in the new Post forecast.

Seeking Out Niche Markets and Marketing or Process Claims

Nevertheless, an increasing share of domestic production is processed and distributed with certifications and superior quality standards. As such, Mexican industry and government officials are continuing to look for expanded or new trade opportunities in the United States, Japan, Angola, Panama and several Asian countries. Primary cuts exported to the U.S. continue to be rib eye, chuck roll, T-bone steaks, and tenderloins. However, private sources have indicated that given Mexico lacks a quality grading program, like that in the United States, most Mexican beef is given a no-roll classification. As such, several industry members are looking to be innovative and find ways to obtain higher premiums for their products in international markets that can garner a kosher, halal or even a USDA process verified program certification. At present, southern Mexican producers seem reluctant to try and market beef as grass-fed even though it may qualify as such.

Domestic Supply Constraints and Strong Demand Hold Live Cattle Exports Lower

The Post new forecast for live cattle exports in 2014 is revised lower to 1 million head, slightly down from the official USDA figure, due to a number of factors. These factors include: the perception that not enough heifers are remaining on hand for breeding purposes as well as the need of Mexican feedlot operators to keep products moving through their facilities which has pushed them to bid competitively with foreign buyers. Post, also, is revising the 2013 export estimate to 990 thousand head, slightly lower from the official USDA figure, due to new trade data. The 2012 Post estimate remains unchanged.

Live Cattle Imports Grow to Bolster Production

Mexican producer needs to repopulate beef and dairy herds have pushed import forecasts for 2014 and estimates for 2013 higher. These animals are only for breeding purposes but numerous feedlot operations have expressed an interest in sourcing U.S. animals directly for slaughter. At present, this practice is not allowed as there is no Mexican zoosanitary requirement sheet (HRZ) that has been negotiated with USDA authorities.

Policy:

Single Window for Trade Has Not Yet Met Expectations

Mexico implemented the "New Single Window for Trade" (VUCEM by its Spanish acronym) at all border crossing points by early October 2013. The program had been undergoing trials at certain crossing points throughout the year. The system allows brokers to electronically file documentation that accompanies cargo shipments of any and all products and was specifically intended to streamline the Customs clearance process. Trade sources report, however, that the electronic system requires more

time than the previous paper system. Mexican authorities are working on improving efficiencies and looking for ways to expedite document and product reviews.

Federally Inspected Type (TIF) Establishments Supported

In late January 2014, SAGARPA announced nearly U.S. \$50 million in government support to promote abattoirs and processing plants under federal oversight and inspection. SENASICA claims that the support will be used to help guarantee the production and processing of safe meat and poultry products.

Trade Liberalization Not Everyone's Best Friend

As previously reported, Mexican meat sector representatives report that they feel threatened by Trans Pacific Partnership (TPP) negotiations and that the domestic meat sector could be challenged as other TPP negotiating members may be able to offer less expensive beef products into Mexico. They acknowledge that countries like Chile, Singapore, Peru, Malaysia and Vietnam present opportunities for Mexican exports but other countries such as Australia, New Zealand, and Canada represent a challenge to them in these third-country markets.

Marketing:

It is clear that the Mexican market is strategic for U.S. exports; in volume, Mexico is one of the United States' top export markets for meat products. The majority of said volume is covered by beef and pork, with very little contribution of other "non-traditional" meats like: veal, lamb, and even bison. In both beef and pork, U.S. products have maintained a positive image in the mind of the Mexican consumer, who is aware of the high quality and safety and is familiar with the meat products available from the United States. The market is well-developed, mature but not saturated, and with knowledgeable, specialized players from both countries.

For beef, there is not much difference between accessing the Mexican retail, foodservice, and processing industry. Importers, distributors, and brokers basically cover all three sectors in their portfolios, so there is no need to approach any sector in particular with a different strategy. The current marketing trend is to position and differentiate U.S. products based on quality in medium and high-end markets. The increase in demand for higher quality beef by the Mexican consumer can be easily confirmed by the different options available in supermarkets' displays, as well as the average restaurant menu. The macro-economic stability and the current trend of healthy eating and staying fit reinforce opportunities for top-quality U.S. products to enter the market quite easily.

Still, there are also opportunities in beef where the consumer is already aware of the difference in quality when using U.S. products and the product is widely used in everyday recipes. Products like knuckle, inside- and outside-round are part of the average, traditional Mexican dishes, prepared at home and consumed every day. Availability of these products has decreased, due to supply issues in the domestic industry and a shift of U.S. exports to other markets, mainly Asia. As a result of price sensitivity in this specific niche, the focus needs to change to prioritize volume rather than price.

As for pork, the market is highly driven by food processors, which mainly use bone-in hams as a source for sausages, deli, and other added-value products. Industry sources calculate that 70 percent of total pork imports are for food processing, leaving the other 30 percent to the fresh, unprocessed products, directly distributed to the retail and foodservice sectors. In pork, there are also opportunities for specialized products that, again, are included in traditional Mexican meals like Boston butt (which can

be used for the famous *trompo/pastor* dish). Additionally, the bone-in loin and ribs are currently becoming a popular entrée, especially in sports-themed restaurants/bars.

Finally, for non-traditional meats mentioned before, like veal and lamb, although trade is significantly low, some market opportunities lie in high-end urban and tourist destinations, where specialty restaurants seek to offer “exotic” dishes and where consumers are more familiar with the taste and use of said products. Still, the distribution and commercialization of these other types of meat will probably be through the same channels as beef and pork, so importers can work with them as compliments to their regular line of products.

Marketing and promotional activities, mostly for beef and pork, are very common in Mexico as the country is considered a strategic market for the U.S. meat industry. Through two Agricultural Trade Offices (located in Mexico City and Monterrey) and via local offices of the U.S. Meat Export Federation (USMEF), exporters can access information and assistance useful to approach the Mexican market. As referred in our 2013 Exporter Guide and other GAIN reports where market entry recommendations are listed, U.S. exporters should seek meetings with potential Mexican partners in the retail, foodservice, and food processing industries by participating in shows like Expo-Carnes (next edition to be held in Monterrey in February 2015), ANTAD (held every year in Guadalajara in mid-March), ABASTUR (also every year in Mexico City around September) and other conferences, seminars, and industry-related events.

Production, Supply and Demand Data Statistics:

Animal Numbers, Cattle Mexico	2012		2013		2014	
	Market Year Begin: Jan 2012		Market Year Begin: Jan 2013		Market Year Begin: Jan 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stks	20,090	20,090	18,521	18,521	17,637	17,760
Dairy Cows Beg. Stocks	3,200	3,200	3,200	3,200	3,200	3,250
Beef Cows Beg.	6,900	6,900	6,750	6,750	6,750	6,775

Stocks						
Production (Calf Crop)	6,800	6,800	6,700	6,700	6,675	6,675
Total Imports	10	10	16	29	20	35
Total Supply	26,900	26,900	25,237	25,250	24,332	24,470
Total Exports	1,539	1,539	1,000	990	1,050	1,000
Cow Slaughter	1,575	1,575	1,450	1,450	1,425	1,400
Calf Slaughter	300	300	300	300	300	300
Other Slaughter	4,500	4,500	4,450	4,450	4,525	4,525
Total Slaughter	6,375	6,375	6,200	6,200	6,250	6,225
Loss	465	465	400	300	300	300
Ending Inventories	18,521	18,521	17,637	17,760	16,732	16,945
Total Distribution	26,900	26,900	25,237	25,250	24,332	24,470

1000 HEAD, PERCENT

Not Official USDA Data

Meat, Beef and Veal Mexico	2012		2013		2014	
	Market Year Begin: Jan 2012		Market Year Begin: Jan 2013		Market Year Begin: Jan 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	6,375	6,375	6,200	6,200	6,250	6,225
Beginning Stocks	0	0	0	0	0	0
Production	1,821	1,821	1,775	1,808	1,795	1,820
Total Imports	215	215	225	220	235	235
Total Supply	2,036	2,036	2,000	2,028	2,030	2,055
Total Exports	200	200	205	170	220	185
Human Dom. Consumption	1,825	1,825	1,785	1,848	1,800	1,860
Other Use, Losses	11	11	10	10	10	10
Total Dom. Consumption	1,836	1,836	1,795	1,858	1,810	1,870
Ending Stocks	0	0	0	0	0	0
Total Distribution	2,036	2,036	2,000	2,028	2,030	2,055

1000 HEAD, 1000 MT CWE, PERCENT, PEOPLE, KG

Not Official USDA Data

Commodities:

Animal Numbers, Swine

Meat, Swine

Production:**2014 Forecast and 2013 Estimate Increased Marginally as Production Practices Improve and Producers Anticipate Market Demand**

The new Post 2014 Mexican pork production forecast is 1.295 MMT CWE slightly up from the official USDA data, due to the continued incorporation of new breeding lines, better farm management techniques, and increasing slaughter weights that have allowed production of more meat from fewer hogs. The revised 2013 production estimate is marginally higher from the USDA estimate to 1.281 MMT CWE, based on preliminary official figures from SAGARPA that take into account the aforementioned trends. Industry members are expected to strengthen and expand the productivity of nearly 5,600 farms to be able to meet anticipated demand for pork cut exports for the Japanese and Korean markets as well as the potential opening of the Chinese market. Post's 2012 production estimate is unchanged.

Porcine Epidemic Diarrhea (PED) Virus Present in Mexico

According to private sources, the PED outbreak has hit some of the major producing areas of the country; including Michoacan, Jalisco, and the "El Bajio" region. Reportedly, PED hit the city of La Piedad, Michoacan, in July 2013 and spread to the neighboring state of Jalisco. Sources indicate that adverse climate conditions with lower temperatures later acted as a vector to spread the virus to the "El Bajio" states of Guanajuato, Queretaro, and to the valley of Mexico and Puebla as well as the northern states of Sinaloa and Sonora. Despite the geographic spread of PED in Mexico, sources report that the virus has not hit an excessive number of farms. The virus presence, however, was one of the leading causes for Post to revise its loss forecast for 2014 and loss estimate for 2013. Industry sources report the sector is becoming vigilant with biosecurity measures and looking for vaccination options to prevent the spread of the virus. As such, even greater losses are not yet anticipated.

But Production Forecast Slightly Higher As Operators Carry Animals to Heavier Weights with Better Genetics and Attractive Grain Prices

Despite PED, Post is forecasting slightly higher production in 2014 and revised its 2013 estimate greater as swine operations are carrying animals to heavier weights and continuing to introduce better genetics. Industry sources report that swine continue to be slaughtered at around 115 kg live weight with a carcass weight of around 82 kg. These members report that swine are held in feed lot operations for around 50 days.

As previously reported, pork feed is based on yellow corn and sorghum and represents approximately 64 percent of the production cost. Industry sources report that although these feed grains are a staple, some northern Mexico producers are feeding hogs with Durum wheat, which is seasonally over supplied, as a special request from interested customers who reportedly find, the taste, color and tenderness of resulting pork cuts an added-value asset. As previously reported, spokespersons for the Mexican pork sector report that pork producers in the states of Sonora and Sinaloa have been requested

to supply specific Asian markets with pork meat from animals exclusively fed on wheat but given current low prices for yellow corn this appears to be done only upon request.

Consumption:

The Post 2014 total pork consumption estimate is 1.96 MMT CWE slightly lower than the official USDA figure as imports are expected slightly lower than the USDA forecast and competition with poultry prices has led to relatively stable, albeit growing, demand. Post’s 2013 estimate of pork consumption was revised downward to account for weaker imports. Post’s 2012 estimate remains unchanged based on official data.

In order to promote consumption, pork sector sources report that they are trying to hold prices unchanged to attract more consumers despite increasing costs for biosecurity and animal health measures.

Trade:

The Post 2014 import forecast is 790,000 MT CWE slightly down from the official USDA data based on the slight increase in production, the sustained demand from the processing sector for picnic and hams, as well as for other cuts or mechanically deboned meat that has a competitive price in Mexico. The Post 2013 pork import estimate is revised downwards to 755,000 MT CWE based on trade data and the slight increase in domestic production. The majority of Mexico’s pork imports remain hams and picnic as well as mechanically deboned meat (MDM) for the preparation of sausages, deli hams, and other cold cuts. Post’s 2012 pork import figures were kept unchanged from official data.

The Post pork export estimate for 2014 is raised slightly from the USDA official forecast to 125,000 MT CWE as the country looks actively to open export markets and expand its share of exports to Asian markets; like Japan. The Post 2013 new export estimate is revised downward fractionally to 109,000 MT CWE based on trade data availability. Post’s 2012 export estimate is unchanged and based on official data.

Japan remains Mexico’s number one export market by volume and value and it’s not expected to change. Pork meat exports to Japan and the United States are mostly loin whereas exports to South Korea consist of bone-in pork.

Production, Supply and Demand Data Statistics:

Production, Supply and Demand Data Statistics:

Animal Numbers, Swine Mexico	2012		2013		2014	
	Market Year Begin: Jan 2012		Market Year Begin: Jan 2013		Market Year Begin: Jan 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Beginning	9,276	9,276	9,510	9,510	9,852	9,876

Stocks						
Sow Beginning Stocks	1,070	1,070	1,075	1,075	1,080	1,080
Production (Pig Crop)	16,500	16,500	16,800	16,850	16,850	16,925
Total Imports	31	31	15	9	15	15
Total Supply	25,807	25,807	26,325	26,369	26,717	26,816
Total Exports	0	0	0	0	0	0
Sow Slaughter	12	12	13	13	15	15
Other Slaughter	15,505	15,505	15,680	15,680	15,700	15,750
Total Slaughter	15,517	15,517	15,693	15,693	15,715	15,765
Loss	780	780	780	800	780	800
Ending Inventories	9,510	9,510	9,852	9,876	10,222	10,251
Total Distribution	25,807	25,807	26,325	26,369	26,717	26,816
1000 HEAD, PERCENT						

Not Official USDA Data

Meat, Swine Mexico	2012		2013		2014	
	Market Year Begin: Jan 2012		Market Year Begin: Jan 2013		Market Year Begin: Jan 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	15,517	15,517	15,693	15,693	15,715	15,765
Beginning Stocks	0	0	0	0	0	0
Production	1,239	1,239	1,270	1,281	1,290	1,295
Total Imports	706	706	785	755	800	790
Total Supply	1,945	1,945	2,055	2,036	2,090	2,085
Total Exports	95	95	110	109	120	125
Human Dom. Consumption	1,850	1,850	1,945	1,927	1,970	1,960
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	1,850	1,850	1,945	1,927	1,970	1,960
Ending Stocks	0	0	0	0	0	0
Total Distribution	1,945	1,945	2,055	2,036	2,090	2,085
1000 HEAD, 1000 MT CWE, PERCENT, PEOPLE, KG						

Not Official USDA Data

Author Defined:

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Other Relevant Reports Submitted by FAS/Mexico:

Report Number	Subject	Date Submitted
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MX4011	SAGARPA to Provide USD 50 Million for Abattoirs and Processors	2/4/2014
MX3077	Cattle Herd Repopulation Plan	10/30/2013
MX3068	Egg Certification Policy Changes with Price and Trade Snapshot	9/10/2013
MX3066	Poultry and Products Annual: Production and Trade Forecasts Bright	8/30/2013
MX3062	Livestock and Products Annual: Outlook for Production and Trade Bright While Consumption Remains Affected by Prices	8/15/2013
MX3058	Outreach in Tijuana and Mexicali for Meat and Poultry Trade	7/16/2013
MX3051	Porcine Epidemic Diarrhea Disease	6/26/2013
MX3048	Newly Authorized Meat and Poultry Exporters to Mexico	6/20/2013
MX3047	Educational Sessions for Meat and Poultry Trade Exporters to Mexico	6/20/2013
MX3043	Pork Price and Trade Snapshot	5/30/2013
MX3026	Broiler Meat Production and Trade Update	3/22/2013
MX3016	Livestock Semi-Annual: Pork Sector Promising	3/4/2013
MX3011	Poultry Semi-Annual – First \$1 Billion Poultry Market for American Exporters	2/13/2013

Useful Mexican Web Sites: Mexico's equivalent to the U.S. Department of Agriculture (SAGARPA) can be found at www.sagarpa.gob.mx, equivalent to the U.S. Department of Commerce (SE) can be found at www.economia.gob.mx and equivalent to the U.S. Food and Drug Administration (SALUD) can be found at 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.