

Required Report: Required - Public Distribution

Date: December 23, 2024

Report Number: MX2024-0060

Report Name: Food Service - Hotel Restaurant Institutional Annual

Country: Mexico

Post: Monterrey ATO

Report Category: Food Service - Hotel Restaurant Institutional

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Report Highlights:

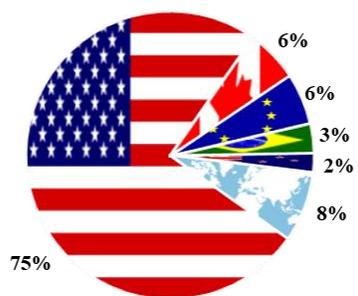
In 2023, the Mexican economy continued its recovery streak for the third consecutive year, while continuing to generate higher-wage jobs, clearly reflected in activity of the Mexican hospitality and foodservice sector. Ranked as the 7th most visited country in 2023, tourism and hospitality remains a vital part of the Mexican economy. In 2024, the first Mexico edition of the renowned Michelin Guide encouraged even greater attention upon the country's already well-established and diverse cuisines.

Market Fact Sheet Mexico

Executive Summary

In 2023, Mexico's GDP grew by 3.2 percent reaching \$1.8 trillion and is forecast to grow around 2.5 percent in 2024. Mexico's economy ranked as the world's 12th largest in 2023. The United States is Mexico's top agricultural trading partner with bilateral trade of agricultural products reaching \$74 billion in 2023. The United States buys almost 92 percent of all Mexican agricultural exports and provides Mexico with almost 75 percent of its agricultural and food imports by value.

Origin of Mexico's Imports of Consumer-Oriented products (2023)



Food Processing Industry

Mexico's food processing industry was valued at \$35.8 billion in 2022. In 2023, Mexico imported \$51 billion of food ingredient products, of which 63 percent were sourced from the United States.

Mexico's food processing industry is the second largest in Latin America, making it a top destination for U.S. food ingredients. Processed meat, dairy, and baking ingredients including confectionary, sweeteners, and flour, make up the largest sectors within Mexico's food processing industry. For additional information, see our latest [GAIN Food Processing Ingredients Report](#).

Food Retail Industry

In 2022, Mexico's food retail industry was valued at \$82.2 billion. There are 26 supermarket chains with more than 3,800 stores which include food products. Traditional mom & pop stores, public and open-air markets make up nearly 58 percent of the sector, distributing local products primarily. In 2022, the retail industry accounted for about 3.3 percent of Mexico's GDP. For additional information, see our latest [GAIN Retail Foods Report](#).

Quick Facts CY 2023

Mexican Imports of Consumer-Oriented Products:

\$ 15.29 billion - World

\$ 11.48 billion – United States

Source: Trade Data Monitor

Top 10 Imported Consumer-Oriented Products:

- | | |
|-----------------------|-------------------------|
| 1. Pork products | 6. Bakery goods/cereals |
| 2. Dairy products | 7. Processed vegetables |
| 3. Beef products | 8. Fresh fruit |
| 4. Poultry (ex. eggs) | 9. Condiments/sauces |
| 5. Food preparations | 10. Processed fruit |

Source: Trade Data Monitor

Top 10 Hotels in Mexico 2023

- | | |
|-------------|-------------------|
| 1. Accor | 6. Hyatt |
| 2. Xcaret | 7. Palace Resorts |
| 3. Marriott | 8. Karisma |
| 4. Riu | 9. Iberostar |
| 5. Hilton | 10. Meliá |

Source: Pasillo Turistico Magazine

Top Ten Restaurant Chains 2023:

- | | |
|----------------------------|--------------------------|
| 1. Aalsea (VIPs) | 6. Bisquets Obregon |
| 2. Gigante (Toks) | 7. Remigio (Italianni's) |
| 3. Brinker (Chili's) | 8. Wing's Army |
| 4. DineEquity (Applebee's) | 9. Carso (Sanborns) |
| 5. CMR (Sushi Itto) | 10. Liverpool |

Source: Euromonitor

GDP/ Population:

Population: 129.74 million (2023, estimated)

Median age (INEGI): 29.3

GDP 2023 (USD): \$1.79 trillion (World Bank)

GDP Real Growth 2021: 3.2% (World Bank)

Food Industry GDP USD (2020): 39.4 billion

| Strengths | Weaknesses |
|-------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| The U.S. and Mexican economies are highly integrated; U.S. food trends reach Mexico quickly. | In small towns or rural areas, transportation and distribution chains are still underdeveloped, limiting business prospects. |
| Opportunities | Threats |
| The vast presence of U.S. industry and government representatives in Mexico facilitates transactions and identification of trade opportunities. | Problems at the border (migrant surges, security issues, transportation strikes, etc.) cause backlogs and can delay clearances of imports. |

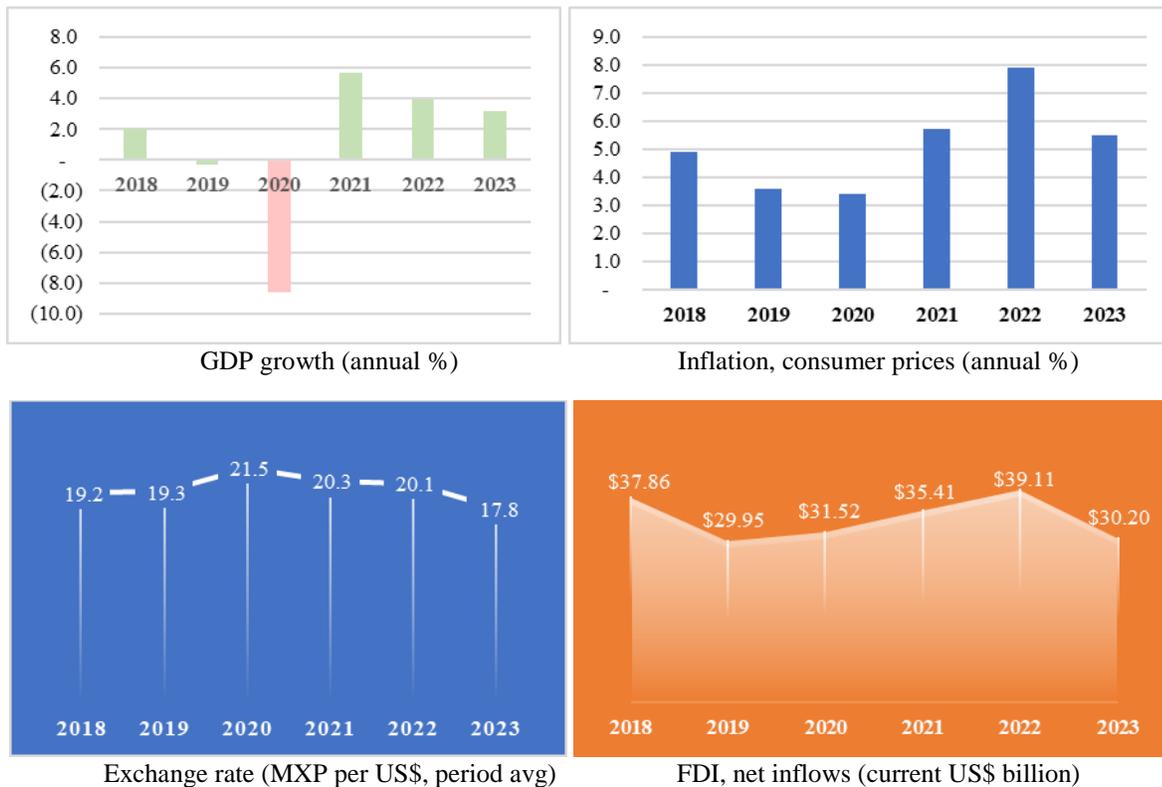
SECTION I. MARKET OVERVIEW

Economy Overview

In 2023, Mexico ranked as the world's 12th largest economy (in nominal GDP terms¹). Mexico remains a developing economy with relative macroeconomic stability, multiple trade agreements, and a diversified manufacturing base, currently benefitting from increased investment due to near-shoring trends in several products' supply chains, remittances, and consumer spending.

The country's economy grew 3.1 percent in 2023, slightly below the 3.9 percent growth of 2022, and is expected to grow only 2.5 percent in 2024.² Domestic demand remains stable despite inflationary pressures; inflation seems to be under control, but still at high levels (5.5% in 2023, according to the World Bank). Consumption remains robust, supported by low unemployment and remittances (over \$66 billion in 2023), while consumer credit still recovers from the pandemic slump. Investment is up, supported by public infrastructure projects in the south. Exports and manufacturing have remained sturdy, thanks in part to manufacturing relocation and new infrastructure projects announced by the federal government. Still, many social and economic challenges remain. Upcoming political changes, both domestic and foreign, have amplified the global economic uncertainties. Poverty rates and inequality remain high. Informality, corruption, abrupt changes in regulations and insecurity in some regions can undermine potential economic growth.

Graph 1. Behavior of Key Economic Indicators, Mexico, 2018-2023



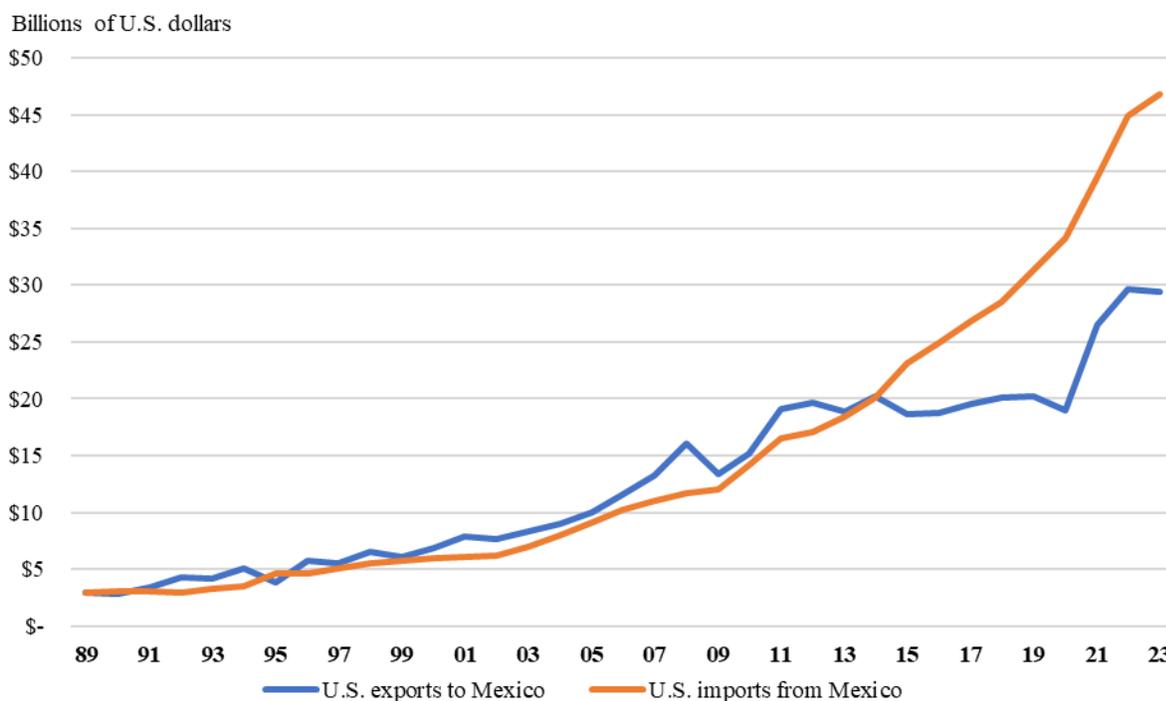
¹ World Bank Data Bank, [December 2024](#)

² OECD Economic Survey. Mexico February 2024.

In terms of overall trade, in 2023 Mexico became the United States' largest trading partner (followed by Canada and China), with bilateral trade totaling over \$725 billion, a 2.75 percent increase from 2022. On the other hand, the United States checks in as the top trading partner of its southern neighbor, buying almost 80 percent of Mexico's exports and providing almost half of the products it imports.

In agriculture, Mexico produces and exports a large variety of high-value consumer products (e.g., avocados, beer, tequila, beef, berries), and is a net importer of bulk commodities, like corn, oilseeds, wheat, rice and beans. Since the North American Free Trade Agreement (NAFTA) was implemented in 1994, and replaced by the United States, Canada, Mexico Trade Agreement (USMCA) in 2020, total U.S. agricultural exports to Mexico increased from \$4.67 to \$29.46 billion in 2023. U.S. agricultural imports from Mexico have also surged.

Graph 2. U.S.-Mexico Agricultural Trade, 1989-2023



Source: Global Agricultural Trade System

Mexico is the third largest export market for U.S. agricultural and related products, behind Canada and China. Meanwhile, it is the second largest market for U.S. consumer-oriented products. In 2023, the United States exported almost \$13 billion in consumer-oriented products to Mexico. The top five exports were dairy, pork, poultry meat, beef and food preparations.

In 2023, the value added by the agricultural sector to the Mexican GDP grew 1.93 percent, and the manufacturing industry contribution grew by 0.85 percent. Mexico's hospitality sector is included in the service industry, and its value added to the GDP grew 3.06 percent, compared to 2022.

HRI Sectors in Mexico

Like in the United States, the Mexican Institute for Statistics, Geography and Informatics ([INEGI](#)), uses the North American Industry Classification System to classify business establishments. Under Sector 72,

Accommodation and Food Preparation, INEGI reports that by the 4Q of 2023, foodservice GDP (in current prices) was valued around \$38.28 billion, a 6.8 percent increase compared to the 4Q of 2022. According to the last Economic Census (in 2019), which has more specific data, sector 72 is divided into two subsectors: 721, “temporary accommodation services” (hotels) and 722, “food and beverage preparation” (restaurants). Hotels account roughly for one-third of the production and income, while restaurants account for the other two-thirds.

Graph 3. GDP of the Mexican Foodservice Sector, 2014-2023



Tourism serves as a key instrument for economic development in Mexico, and hotels and restaurants are strategic elements of the Mexican government’s tourism strategy. The Mexican Secretariat of Tourism ([SECTUR](#)) estimates that tourism accounts for 4.2 percent of the national GDP. In 2023, Mexico was ranked as the 7th most visited country in the world, with 42.2 million international tourists, up 9.5 percent from 2022. The economic revenue of tourism in 2023 was \$28.56 billion, 8.4 percent higher than 2022. According to SECTUR, the average expenditure was \$681 per tourist.

Hotels

According to SECTUR, in 2023 Mexico had 26,524 hotels and 890,213 hotel rooms, four percent more than in 2022. The main leisure tourism destinations are the Cancun-Riviera Maya corridor, followed by Mexico City, Puerto Vallarta, and Riviera Nayarit. In terms of business tourism, which grew 12 percent in 2023, Mexico City, Guadalajara and Monterrey are the top destinations. Business travel is growing thanks to nearshoring, the priority for responsible travel practices and sustainability, and the preference to have "face-to-face" corporate events, particularly after the pandemic.

Mexico ranks seventh in the world in terms of hotel supply. According to SECTUR, the Mexican hotel industry accounts for almost 30 percent of the tourism GDP and generates nine percent of tourism jobs, with each room generating 1.5 direct and three indirect jobs. The following map shows where the most

income is generated by hotels, with Quintana Roo, Mexico City, Baja California Sur, and Jalisco being the leaders in the category.

Map 1. Hotels' income; share by state (2019 Economic Census)



Every year, hospitality magazine *Pasillo Turístico* publishes a Top 10 Hotel Chains list based on feedback from travel agencies and tour operators based on operations, promotions, products, and services. For 2023, the awarded chains were:

1. Accor (44 hotels, 11 brands, multiple locations)
2. Xcaret (3 hotels in one location)
3. Marriott (295 hotels, 23 brands, multiple locations)
4. Riu (22 hotels, 2 brands, in six locations)
5. Hilton (108 hotels, 14 brands, multiple locations)
6. Hyatt (103, 22 brands, multiple locations)
7. Palace Resorts (8 hotels in four locations)
8. Karisma (5 hotels, 3 brands, in two locations)
9. Iberostar (11 hotels, 3 brands, in four locations)
10. Meliá (10 hotels, 3, brands, in five locations)

In addition to traditional hotel accommodations, vacation rentals are very popular in Mexico. The versatility of places to stay and the flexibility of reservations has made Mexico one of the top 10 vacation rentals destinations. Remote work has attracted more foreigners to live in Mexico as the cost of living is relatively low. The features most sought out when searching for a vacation rental are high speed internet and pet friendliness. Mexico's relatively good infrastructure and services, pleasant year-round climates, and low cost of living makes it a favorite destination for expatriates, specifically from the United States. As a result, investment properties that are available to rent on a seasonal basis and timeshare arrangements are also popular types of accommodation in some areas of the country, particularly along the coasts.

Restaurants

According to INEGI, there are over 761,500 establishments registered under the food and beverage preparation category, 12.8 percent more than the ones registered at the end of 2022. This includes various categories like cafes & bars, full-service restaurants, quick service restaurants (fast food), cloud (or dark) kitchens, and catering services. Fast food restaurants are considered the most affordable within

the sector and are preferred by Mexican consumers (particularly families) when dining out. This segment has reacted to consumer habit changes by including plant-based products in their menus, offering more frequent collaborative experiences and adjusting their menus to offer popular dishes with slight adaptations to differentiate from others. The following map shows where the most income is generated by restaurants, with Mexico City, the State of Mexico and Jalisco being the leaders in the category.

Map 2. Restaurants’ income; share by state (2019)



According to the last National Enquiry on Income and Expenditure from INEGI (2022), the average household spends 30 percent of its income in food and beverages consumed within the house, while spending 7.4 percent on “eating outside”. Full-service restaurants are preferred by consumers with higher income, and offer a wider variety of cuisines, with Asian, Mexican, Middle Eastern, Mediterranean, and Fusion being the most popular categories. The top ten full-service restaurant chains in Mexico in 2023 in terms of market share were:

1. Alsea (VIPS, Starbucks, Domino’s Pizza, Burger King, P.F. Chang’s, TGI Fridays)
2. Gigante (Toks, Panda Express, Shake Shack, El Farolito, Beer Factory)
3. Brinker (Chili’s)
4. DineEquity (Applebee’s, IHOP)
5. CMR (Sushi Itto, Wings, Olive Garden, Red Lobster, Nube 7, Los Almendros)
6. Bisquets Obregon
7. Remigio (Italianni’s)
8. Wing’s Army
9. Carso (Sanborns)
10. El Puerto de Liverpool

A vital component of Mexican foodservice are street vendors, who provide a wide assortment of food products and represent a key element of Mexico’s many regional cuisines and overall culinary heritage. Street food has gained popularity due in part to popular streaming service television shows and social media influencers that highlight the genre’s authenticity and flair. This independent segment of foodservice is primarily supplied by public/wholesale markets and cash & carry outlets, and demands primarily domestic/local products, very seldom using imported goods. However, due to its popularity, these business units have inspired chefs from full-service restaurants to create their own versions of street food and offer them to their customers, thus “adapting” them with imported products, creating a

gourmet-version of the original food product. Also, in some high-end niche markets, like Los Cabos or San Pedro Garza Garcia, these street vendors adjust to the economic “buoyance” of their customers, and include imported ingredients, considering these market’s lower sensitivity to higher prices.

Key Drivers and Consumer Trends

The recovery of tourism in the country continues to increase, driven by digital nomads (professionals working remotely from abroad), and the growth of the MICE (Meetings, Incentives, Conferences, and Exhibition) segment in business travel and by more complex experiences and infrastructure investment in leisure travel. It is expected that more visitors will bring with them expectations and requirements that will encourage new developments and innovations in the foodservice sector serving them. As for the domestic population, Mexico remains as a price-sensitive market even while there are consumers willing to pay for premium quality products.

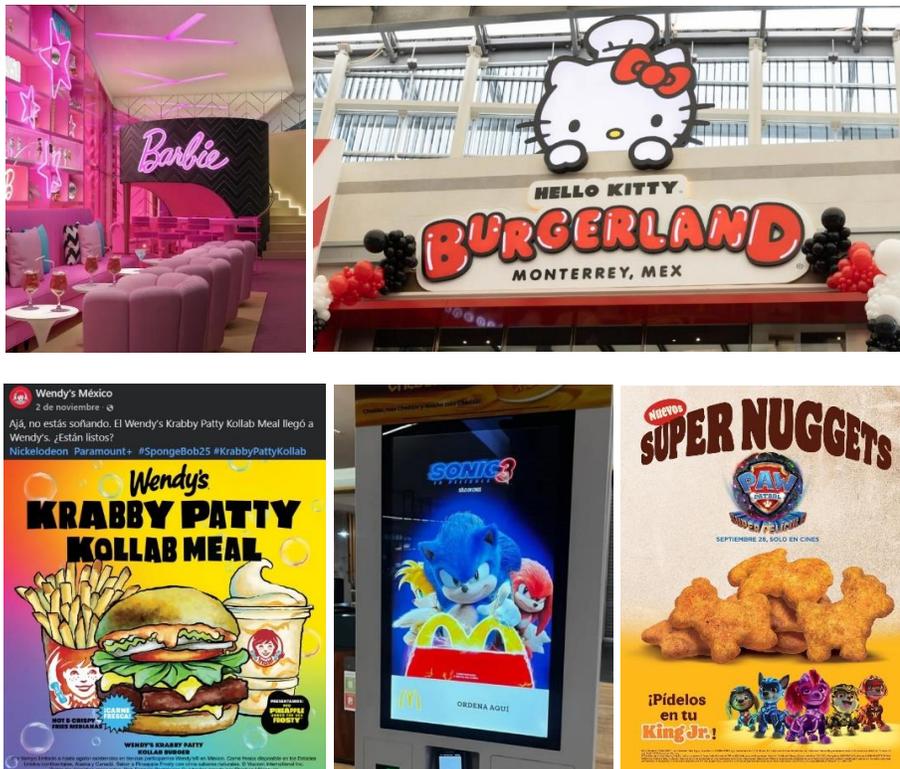
Table 1. Advantages and Challenges for U.S. Exporters

| <u>Advantages</u> | <u>Challenges</u> |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Consistent supply chain investments ensure reliable and timely deliveries of perishables, preserving product quality and strengthening the U.S.-Mexico supply chain network. | Imported specialty products have higher prices than domestic food products. |
| Foodservice distributors increased their flexibility (during the pandemic) to abrupt changes in consumption, offering a better, more integrated distribution channel. | Issues like illegal migration and insecurity sometimes affect the distribution network, causing trade disruptions and traffic bottlenecks. |
| The shared border between the United States and Mexico gives U.S. exporters a competitive logistical advantage over other countries’ suppliers. | With Mexico’s food distribution network continuing to improve, Mexico’s market becomes attractive for additional competition from other countries. |
| Mexican foodservice distributors and consumers are remarkably familiar with U.S. food products, market trends and industry practices. | Mexican restaurants are adapting its menus due to inflation by reducing portions or using lower-priced alternatives. |
| | A proposal to modify the working week from 48 to 40 hours, currently discussed by Congress, might affect restaurants given their dependency on delivery services and servers. |

Industry sources commented that they are aware of four major priorities for consumers that will significantly impact the business landscape in 2024: culture/values, the economy, the environment, and technology. Regarding consumer expectations, it is important that when going out to eat, Mexicans are looking for experiences that allow them to have fun, satisfy cravings, relax, have quality time with family and friends, celebrate special occasions, and experience new things.

Another noticeable trend in the foodservice sector is related to healthy eating and traditional local/regional recipes. First, the use of plant-based ingredients in iconic dishes from different restaurants. According to Euromonitor, 12% of Mexican consumers consume plant-based products weekly or frequently. This reflects on the foodservice sector demanding from their supply chain better traceability, sustainable practices, and fair trade/labor certifications. Second, traditional recipes; Mexican cuisine is globally recognized, so restaurants try to differentiate by offering locals new flavors and tourists new experiences centered around traditional local or regional dishes.

According to Euromonitor, 15 percent of consumers prefer to spend their money on experiences rather than products. This has caused an increase in the collaborations of the foodservice sector with the entertainment industry, social media influencers and celebrities. Recently, Mexican consumers witnessed the launch of a specialized Hello Kitty-themed restaurant and a Barbie lounge, fast food promotions tied to SpongeBob SquarePants 25th anniversary (Wendys), and upcoming promotions highlighting movie premiers: Sonic 3 (McDonald’s) and Paw Patrol: The Mighty Movie (Burger King).



Foodservice experiences in Mexico: 1) Barbie lounge in Monterrey, 2) Hello Kitty restaurant in San Pedro, 3) Wendy’s Facebook announcement of their “Krabby Patty” collaboration, 4) Sonic 3 highlighted in a McDonald’s ordering kiosk in Mexico, and 5) Burger King’s poster announcing Paw Patrol-shaped nuggets.

Another interesting element that will boost gastronomic tourism and enhance the perception of Mexican cuisine globally is the arrival in 2024 of the renowned [Michelin Guide Mexico](#) (known for recognizing select restaurants based on the excellence of the products offered). While Mexican cuisines were already world-renowned and well-regarded alongside other major national and regional gastronomic traditions, the country’s inclusion in the guide is further recognition of this. For 2024, establishments ranging from neighborhood taco stands to prix-fixe fine dining were included. Large metropolitan centers such as

Mexico City, Monterrey and Guadalajara, coastal tourist hotspots, and traditional regions such as Oaxaca all feature in the guide. The competition to be awarded a Michelin Guide nomination will encourage foodservice players to seek better ingredients, which translates in potential additional demand of imported goods.

SECTION II. ROAD MAP FOR MARKET ENTRY

Many U.S. companies seeking to export to Mexico should first attend trade shows such as Abastur and ExpHotel (see Section V for additional details and shows) to gain insight on the Mexican market, establish new contacts, and get to know buyers, potential business partners, importers, and distributors. It is important to recognize the differences between Mexican and U.S. [business culture](#), and to consider regional purchasing patterns. Mexico is a large and diverse country with different consumer patterns and economic conditions depending on the region; some products might fit perfectly in certain regions, but not in the whole country.

It is important for U.S. companies to find an experienced and professional importer or distributor as local partner. A good customs broker will also help with issues related to regulations, procedures, labeling, and customs clearance. Some retailers that the foodservice sector uses for its supplies have their own purchasing and importing departments. Companies attempting to approach large chains should have enough production capacity to meet the volumes required.

Please be sure to check our latest [Exporter Guide](#) and our latest [Food and Agricultural Import Regulations and Standards Country Report](#) for additional information.

SECTION III. COMPETITION

Mexico's foodservice sector is a highly developed market, with multiple players on the national and regional level. U.S. food and agricultural exports enjoy a favorable reputation in Mexico due to consistent product quality, stable supplies, and proximity. Additionally, preferential market access under NAFTA/USMCA further enhances bilateral trade. Other major exporters to Mexico are Canada, the European Union, New Zealand, China, and Brazil.

Table 2. Top Mexican Imports of Consumer-Oriented Products, CY 2023

| Commodity | Partner Country | Value in \$ Million |
|--------------------------------------------|------------------------|----------------------------|
| Pork & Pork Products | World | \$ 3,140.77 |
| | United States | \$ 2,654.32 |
| | Canada | \$ 416.92 |
| | Brazil | \$ 50.51 |
| Dairy Products | World | \$ 1,927.50 |
| | United States | \$ 1,410.03 |
| | New Zealand | \$ 327.84 |
| | European Union | \$ 165.83 |
| Beef and Beef Products | World | \$ 1,310.97 |
| | United States | \$ 1,069.97 |
| | Canada | \$ 205.86 |
| | Brazil | \$ 19.01 |
| Poultry & Poultry Products (excl. eggs) | World | \$ 1,253.99 |
| | United States | \$ 905.24 |
| | Brazil | \$ 348.20 |
| | Canada | \$ 0.54 |
| Soup & Other Food Preparations | World | \$ 1,010.46 |
| | United States | \$ 912.59 |
| | European Union | \$ 43.52 |
| | China | \$ 11.68 |
| Bakery Goods, Cereals & Pasta | World | \$ 813.77 |
| | United States | \$ 552.41 |
| | Canada | \$ 139.32 |
| | European Union | \$ 71.24 |
| Processed Vegetables | World | \$ 732.31 |
| | United States | \$ 553.53 |
| | European Union | \$ 95.38 |
| | Canada | \$ 34.67 |
| Fresh Fruit | World | \$ 709.02 |
| | United States | \$ 497.71 |
| | Peru | \$ 142.99 |
| | Chile | \$ 42.76 |
| Condiments/Sauces | World | \$ 490.33 |
| | United States | \$ 453.05 |
| | European Union | \$ 20.90 |
| | China | \$ 7.74 |

Source: Trade Data Monitor

SECTION IV. BEST PRODUCT PROSPECTS

Many foodservice trends in Mexico correspond with global trends. Middle and upper-class Mexican consumers follow contemporary trends in dieting, traceability/sustainability, and ingredient information, thus becoming more knowledgeable and selective. As a response to increased competition, hotels and restaurants across the price spectrum seek to provide not just a mere product or service, but a whole consumer experience. Hotels include visits or tours to agricultural production areas like distilleries, vineyards, craft beer facilities, and traditional agricultural farms, of host local farmer's markets so guests can enjoy some of the local/regional products. Similarly, restaurants have their own kitchen gardens or partner with local producers for fresh supplies. High-end businesses offer casual options with quality foods at affordable prices. Renowned Mexican chefs frequently collaborate with restaurant chains, cafes, bakeries, breweries and even cinemas. Niche opportunities continue to appear as Mexico's domestic processing sector diversifies and consumers shift to demand healthy, convenient, and high-quality foods.

Given that there are over forty categories of consumer-oriented products of which the United States exports more than \$50 million annually to Mexico, it is difficult to single out high-potential items for such a diversified and vibrant marketplace. With Mexico being a very mature market, heavily influenced by the United States due to its geographic proximity, there are market opportunities everywhere, particularly for new, innovative food products with growth potential, such as:

- Natural/organic products, produced through sustainable methods.
- Plant-based alternative products (soy and almond beverages, plant-based proteins)
- Food perceived as healthful (superfoods, vegan, and gluten-free products).
- Specialized or differentiated dairy products.
- Sugar-free and alcohol-free beverages (smoothies, juice blends, vitamin-added water).
- Ethnic foods (spices, food bases, cereals, and condiments).
- Wine, spirits, and craft beer.

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Please contact the Agricultural Trade Offices (ATOs) in Mexico if you have any questions or comments regarding this report or need assistance exporting U.S. food and beverage products to Mexico.

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MAIN TRADE SHOWS IN MEXICO [2025-2026]

|  Show |  Description / Industry |  Date |  Location |
|--------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| Expo Carnes y Lacteos | Beef, pork, poultry and dairy. Processing and consumer ready. | March 4-6, 2025 | Monterrey |
| Expo Café & Gourmet | Gourmet food and beverages. Coffee shops. | March 13-15, 2025 | Guadalajara |
| Expo ANTAD | Retail, consumer goods. | March 25-27, 2025 | Guadalajara |
| ExpHotel | Regional hospitality industry. <i>(In 2025 there will be two editions)</i> | March 4-6, 2025 June 10-12, 2025 | Puerto Vallarta Cancun |
| Cerveza Mexico | Craft brewing industry. Two locations. | May 16-18, 2025 TBD - October, 2025 | Guadalajara Mexico City |
| Confitexpo | Confectionary industry. | July 29-31, 2025 | Guadalajara |
| Abastur | Hotel, restaurant and catering industries. | August 27-29, 2025 | Mexico City |
| Gourmet Show | High-end, gourmet consumer products. | September 4-6, 2025 | Mexico City |
| Mexipan | Bakery industry. | July 29-Aug. 1, 2026 | Mexico City |

ADDITIONAL INFORMATION

Visit [USDA-FAS Headquarters website](#) for a complete selection of FAS worldwide agricultural reporting.

Useful Mexican Web Sites: Mexico's equivalent to the U.S. Department of Agriculture is the [Secretariat of Rural Development \(SADER\)](#); also, the equivalent to the U.S. Department of Commerce is the [Secretariat of the Economy \(SE\)](#). These websites are mentioned for the readers' convenience, but USDA does not endorse, guarantee the accuracy of, or necessarily concur with the information contained on the mentioned sites.

Attachments:

No Attachments