



Opportunities for Dutch Businesses in the Mexican Food Retail Sector

Executed by:



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The Mexican Market

MEXICO: DEMOGRAPHIC & MACROECONOMIC OVERVIEW

RELEVANT FACTS

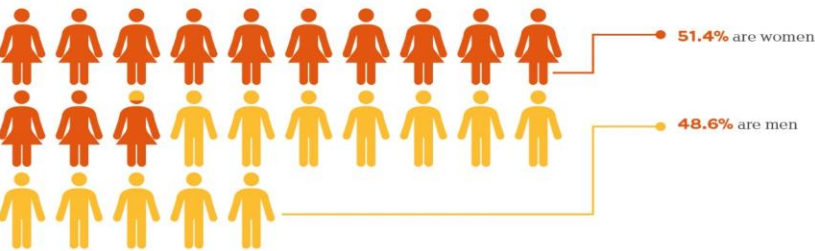


2nd
Largest population in Latin America.

15th
Economy worldwide in terms of GDP.

125
Million Inhabitants

POPULATION



Average Age

27
Years Old

With **75 million** inhabitants under or equal to the age 27

LIVING AREAS

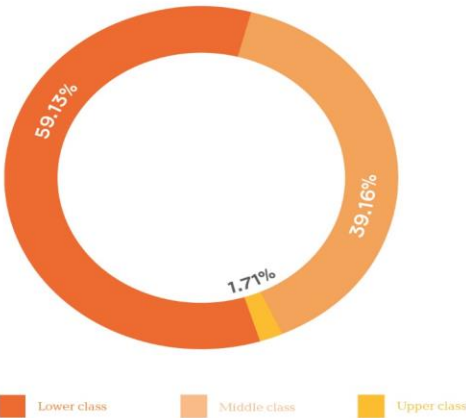


75.5%
of population lives in Urban areas



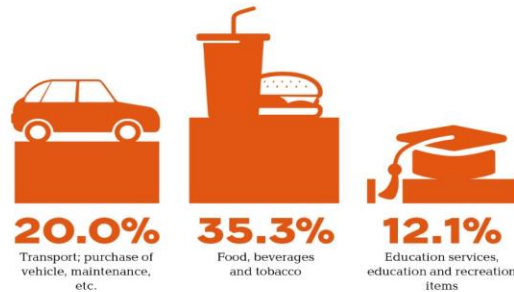
24.5%
of population lives in Rural areas

WEALTH DISTRIBUTION

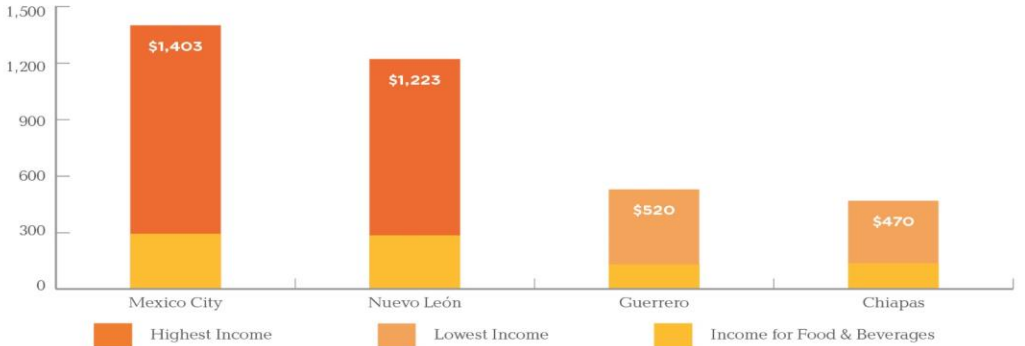


SPENDING BEHAVIOR

In **2018** the three main categories where Mexicans spend their salaries are:



MONTHLY AVERAGE OF INCOME LEVEL



Demographics

Comparison with Europe



Figure 1. Mexico placed in Europe, demonstrating the size of the country and the complexity to reach some areas within it.

Facts

- National distribution of wealth has improved with the growth of the middle and upper-middle class, which form the pillar of the economy.
- The average age of **125** million inhabitants in Mexico is **27 years**. This, along with a population concentrated in cosmopolitan cities, create more interest and demand for foreign food products and tastes.
- Food consumption is a central aspect of Mexican social life.

Trends: How is the Mexican market moving?

Purchasing power

The middle-class is growing as a result of continuous economic growth. In addition, a very large young population is more aware of food trends. The **purchasing power** of the targeted population allows access to *high-end* and foreign products.

Retail locations

Supermarkets and specialty stores remain the principal retail spots of European products for Mexican consumers. It is important to focus on these channels.

E-commerce

E-commerce in Mexico is growing but people still prefer to go to a physical store to get food products.

Platforms like Amazon could become interesting as the platform continues to grow in Mexico. Products that are usually being sold through Amazon are larger-amount product

Trends: Food-retail products consumption trends in Mexico

Targeted Mexican consumer is interested in:

1

Sustainability

Being part of the big movement towards more conscious food consumption patterns.

2

Ingredients

Getting informed about the ingredients and their origin and the processing of the products for better quality.

3

Gourmet

More diverse food experiences, including foreign food trends and products.



Where are the opportunities for Dutch companies?


Influence in Mexico

The Mexican culture is extremely influenced by industries coming from the U.S. Its geographical proximity and commercial exchange with the U.S. has great impact on the economy. One example is the rise of **Walmart**, which now owns roughly **sixty percent of the retail market** in Mexico with its own stores and subsidiaries.

Nonetheless, people are in constant search of innovative products coming from a different country than the U.S. At this point, **European companies can take advantage of their perceived reputation**, profiting from the historical status of European culture in Mexico, which has long been associated with high end experiences

To a certain extent, **Europe is considered as a role-model** to follow concerning good practices and development in general. Mexican society perceives European products as high quality and desirable.





Market status in Mexico

Key factors to take advantage of

Dutch products have the opportunity to be sold as *gourmet* or *high-end product* practically anywhere in the country where there is sufficient purchasing power (primarily metropolitan areas).

European products have a good reputation and are perceived as *fancy*. Especially when it comes to food. This is reflected by the growth and increasing variation of food offers in restaurants that cater to the urban population.

There are still many product niches which remain unsaturated in Mexico. They provide a big opportunity for Dutch companies to fill.



Bread & Bakery

Most bread consumption in Mexico is **white bread**. Darker multi-grain type breads, as well as sour-dough breads, are less available. Due to their perceived higher nutritional value, the demand for these types of products is increasing especially amongst urban middle and upper classes. There are small bakery establishments which produce these types of breads. However, these types of breads remain scarce in supermarkets, who focus primarily on highly processed and sugar-containing packed loafs.

Mexican sweet bread – *pan dulce* in Spanish- encompasses anything from pastries to cookies. With more than **2,500 different types of sweet bread**, its consumption is part of the daily life of the Mexican population throughout the country.

Sweet bread has been adopted mainly from French pastries and modified over the years ending up in Mexican unique creations of flavors, textures, and shapes. Sweet bread is consumed among all ages, social classes and places. Its popularity lies on the **practicality and low cost**.

There are over **60,000** establishments that sell bread & bakery products:

- **80%** are labeled as informal commerce (no target for European products)
- **97%** are small to medium sized businesses (SMEs)
- Hand-crafted bakery occupies **20%** of the industry in Mexico, offering lower-calorie and sugar-free products, not necessarily European style bread.

The annual per capita consumption of baked goods is **33.5 kg**, distributed as follows:

- **70-75%** white and whole meat bread
- **25-30%** sweet bread, biscuit and cakes.

In big cities and small towns, the majority of the **bakeries** have **fresh bread as it is baked every day**. These bakeries are usually **self-service style**. Nevertheless, companies like Bimbo have sweet baked pastries that are well-accepted products within the market as they are handier and more adaptable to the fast pace of life.



Nowadays, small, medium and large bakeries, supermarkets and wholesales stores are baking their own bread at their facilities to offer a fresher product. The most available products at the different points of sale are **pre-sliced bread box, baguette-style bread or western style bread.**

White bread, box bread and sweet bread are the most popular form of bread consumption. There is currently a wide variety of products available at the points of sale.

The variants can be from the base of the dough or as added elements. Some examples:

- Wholegrain White bread
- Flaxseed bread
- Soft honey bread
- Wheat and 100% whole wheat bread
- Rye-based
- Multigrain added (wheat, sunflower seed, corn, rye, oatmeal, barley)

Relevant characteristics:

- These variations can be found in both soft and toasted bread.
- Box-bread is sold in pre-sliced presentations. These presentations can go from small packaging (15 slices approx.) to large packaging (23 slices). It all depends on the brand, but these are the most common.
- Adapted packaging for wholesale stores goes up to 43 slices.
- Almost all variations announce on the package that vitamins and minerals have been added for a healthier dough.
- Prices do not vary much between brands or points of sale.



Dairy

The **Mexican market** for **fresh dairy** is **saturated** with large **Mexican brands**. Until now, Dutch dairy products from Dutch producers have found a small niche belonging to the gourmet products, particularly in cheeses and (infant) milk powders.

Part of the Mexico-EU agreement (2018) covers products in the dairy segment. For example, a range of European cheeses will be given preferential access to the Mexican market.

Equally relevant is the securement of 30,000 tons of milk powder, which will be allowed into Mexico from the EU to be applied when the agreement comes into force. (More information concerning the agreement in chapter 5. New EU-MEX Free Trade Agreement.)

A good **opportunity for Dutch producers** and distributors in terms of dairy products for final consumption is **in powder and canned products** such as baby powder. These have a long shelf-life and are not produced widely by domestic Mexican brands.

Already available baby-powders are Nestlé, Friso products (FrieslandCampina) And the most-recent entry of *Kabrita* of Ausnutria. In terms of milk, and fresh dairy products, an opportunity would be to work with a local Mexican producer.



Meat

Meat is a main staple of the Mexican diet, served in a wide variety of dishes. The price range depends on the type of meat (poultry is cheaper than pork, and much cheaper than beef) as well as the source of the meat. The majority of nationally **consumed meat is produced by national producers**. Of this, a majority is sold through markets and **butcher's shops** that cater to the population with a lower income. Another segment is sold in **supermarkets**, where it is generally subject to greater quality control and certification requirements.

The difference in price is significant to the degree that a loss in general consumer confidence tends to drive chicken and eggs sales up, and other types of meat down. Nonetheless, pork remains a very popular staple, particularly as part of regional dishes. The north is known for its barbeque culture where beef is the centerpiece.

Meat substitutes

In Mexico, the meat substitute sector was slower to enter in comparison with European markets. Mr. Tofu, one of the first **online webshops** which imports and distributes meat substitutes in Mexico, was founded only in 2014.

However, physical stores focused on meat alternatives and other “vegan foods”, have been **popping up in urban centers**, particularly in **Mexico City, where we find the biggest market**. Apart from Mr. Tofu, which now also has several physical locations, there are multiple non-chain locations such as Gold Taco. These stores are predominantly located in the wealthier urban areas of Mexico City which have **large affluent young populations**.

Webshops and physical locations focused on soy and other vegetable-based products, **have a greater variety of foreign products than supermarkets**.

Notably, not all supermarkets sell these brands, and the **market for meat substitutes** is still very much in the **process of consolidation**. It is worth noting that products like Beyond Meat are sold at a higher price range than real meat. The chance that people with lower income (who are also less likely to visit these supermarkets) will consume these products, is smaller.



Some opportunities for **meat products** derived from the EU-MX modernized treaty



The most interesting segment is pork, as demand from abroad is high. However, the current import in Mexico originates from the Americas, and European supply remains low. However, the recent trade agreement between Mexico and the EU is expected to provide duty-free conditions on almost all pork products, allowing the EU to substantively increase pork export to Mexico. With a very strong export market in the Netherlands, the opportunities are there.



High-quality meat substitutes

Mexico continues to import flank steak, shank, and other low value cuts for processing such as enhancing or mincing. Imports of lower-valued cuts should experience higher demand as Mexico needs supplies for processing to offset rising exports of higher value products.

Some interesting facts

- Beef from Argentina is perceived as a high-quality product; the other significant share of imported beef comes from the US. The imported high value cuts such as rib eyes, New York strips and T-bones continue to be offered by some big retailers or in the restaurant and hotel industry.
- However, volumes are relatively small as the population that can afford the high prices is limited. Imported meat is seen as a high-quality product, better than the national meat.

Opportunities: European Fine-Food & Organic food

European Fine-Food

- **Bake-off products**
- **Pasteurized dairy**
- **Meat substitutes**
- **Meat to be processed or for foodservice supply chain**
- **Cheese**
- **Sweet cookies**
- **Other**

Organic and special-restriction Food

The way organic products are marketed varies between 'gourmet' and 'sustainable'. In regular supermarkets they are portrayed as gourmet. Organic products can be found in the 'natural food section', close to the gourmet section. Within this 'natural food section' organic products as well as sugar-free / gluten-free / non-chemical / Kosher certified products are found. The customer has to look carefully whether a product from this section is organic or not. The packaging of the organic products is often designed to look high-quality as opposed to being sustainable. In all-organic specialty stores, the focus shifts from gourmet to sustainable. There you can find products with packages made of recycled material and even products sold without packaging.

Furthermore, typically vegetarian and vegan consumers tend to lean towards organic products. In regular supermarkets research shows that most of the vegetarian/vegan products are not organic, hence indicating a good potential.

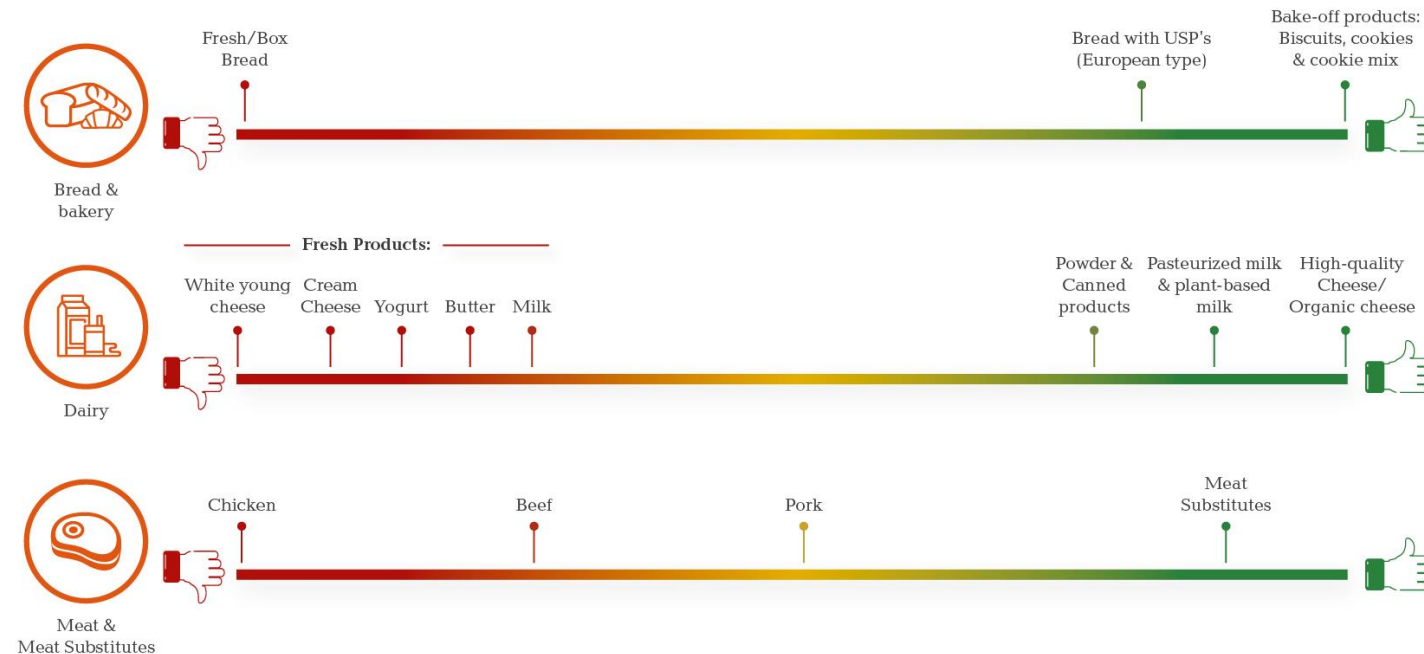
DUTCH FOOD PRODUCTS WITH POTENTIAL IN MEXICO

TRENDS

Due to the positive demographics curve, the large density of the high youth population in the middle-class category has led to the concern for well-being and sustainability has increased. This is reflected in the increasing demand in the organic food sector, which serves as a complement for lifestyle, along with exercise and mental well-being.

LARGE OPPORTUNITY IN: ORGANIC & FINE-FOOD SECTOR

- Dutch (European) products are perceived as gourmet
- Willing to pay a bit more for these products as purchases are better-made decisions considering relevant factors beyond the product
- Demand for eco-friendly, animal welfare, vegan, sustainable processing products
- Long shelf-life products show particular potential due to lower transportation costs and ease of product distribution
- Suggested target market: medium to upper-class points of sales in supermarkets, niche stores, and specialty stores
- A well-defined marketing strategy when entering the market is a must



SOME KEY-FACTS PER CATEGORY

- In 2017, 33.5 kg was the annual per capita consumption of baked goods
- Small, medium and large bakeries, supermarkets and wholesale stores bake their own bread at their facilities
- There are over 2,500 different mexican types of sweet pastries
- High demand for lactose-free & sugar-free products
- Domestic dairy production meets national demand
- Common belief that dairy is healthy among Mexicans
- Meat is the main staple in the Mexican diet
- Pork and beef are promising products, once the EU-MX is ratified (end of 2020)¹
- Beef is a luxury product
- Meat substitutes targeted to niche stores

¹ There is no official nor an established date for it to be ratified

Opportunities: Where to enter?

Medium, upper-medium & high classes are the ones of interest in the Dutch food producer/supplier.

These classes are most concentrated in specific regions of the country.

This map shows nine of the most important metropolitan areas of the country where there is a high concentration of population. The principal urban areas are Mexico City (CDMX), Guadalajara, and Monterrey.

It is suggested to start with one of the metropolitan areas, as they have a strong logistical infrastructure, large customer target groups and relatively low insecurity.

They also house most of the importing/distributing agencies in Mexico.

Metropolitan areas of opportunity for Dutch products



Opportunities: Suggested destinations for European foodstuffs

Points of sale

1. Supermarkets with middle and upper-middle class targets:

City Market, Superama, Chedraui Selecto | Middle targets: Walmart, La Comer, etcetera.

2. Wholesale stores: *Costco, Sam's Club*

3. Specialty & niche stores:

The concept and business model of these stores is focused on providing a product portfolio aiming for health, respect for nature, fair trade and responsible consumption, and some even take in consideration ancestral wisdom.

Characteristics of the consumers: ingredient awareness, production process and health effects of the products purchased, willingness to contribute to a better environment.



Some of these stores sell only domestic products to help local producers, but they accept a variety of imported products, especially when products have Unique Selling Points (USP's) that are new to the market. Example: [The Green Corner](#) (6 stores).

There are also large department stores with gourmet experiences: [Palacio de Hierro](#) (11* | 16**), [Liverpool](#) (11* | 130**)

*Mexico City metropolitan area

**In all Mexico

Opportunities: Suggested points of sale in the main three metropolitan areas

	Number of stores in:				Number of stores in:		
	CDMX	GDL	MTY**		CDMX	GDL	MTY
	7	1	1		9	2	3
	6	2	-		36	7	9
	16	13	-		6	-	-
	49	8	3		11	1	1
	386*	36	33		5	-	-

*Population target vary depending on the location of the store within the city depending on the socioeconomic level.

**[HEB](#) & [Súper Mode](#) are two popular supermarkets in Monterrey.

An aerial photograph of a large port area. In the foreground, a large container ship is docked at a pier, its deck filled with stacks of colorful shipping containers (blue, red, green, white). Several large blue and red gantry cranes are positioned along the pier, some with their arms extended over the ship. Behind the ship, the port yard is filled with numerous stacks of shipping containers, organized in neat rows. More cranes are visible in the background, and the overall scene depicts a busy international trade hub.

International Trade Regulations

International trade: Regulation on additives, flavourings, colourings, ingredients

CODEX Alimentarius: International Food Standards

*(Food & Agriculture Organization of the United Nations
World Health Organization)*

General Standards, Guidelines and Codes of Practice on veterinary drugs, pesticides, food additives and contaminants are discussed and set in Codex meetings. These are the core Codex texts and apply to all products and product categories. These texts typically deal with hygienic practice, labelling, additives, inspection & certification, nutrition and residues of veterinary drugs and pesticides.

- Non-mandatory but voluntary application by members. Codex standards may serve as a basis for national legislation.
- The harmonization of food standards contributes to the protection of consumer health and to the fullest possible facilitation of international trade.
- European Union countries & Mexico are members of this organization.

From the Mexican Ministry of Health

There is an agreement on the determination of additives and co-additives in foods, beverages and food supplements, their use and health provisions.

This agreement indicates-among other information- the additives and adjuvants which may be used in the products and their health provisions; establishing a reference list from which maximum limits in foods, beverages and food supplements can be set.

The details on the amount of each category of additive or adjuvant is listed and explained here:

http://www.dof.gob.mx/nota_detalle_popup.php?codigo=5259470

When no product or category of products or maximum limits are expressly stated in Annexes I, III and VII of this Law, the manufacturers of the products may use these additives by reference to the provisions of the CODEX, the United States regulations, the Canadian regulations or the **European Union regulations**.

International trade: Regulation on additives, flavourings, colourings, ingredients

For example, at federal level in Mexico:

From the General Law of Import and Export:*

The butter, to be considered as such:

Butter, natural butter, whey butter or recombined" butter (fresh, salted or rancid, whether or not in airtight containers(closed) derived exclusively from milk, with a 80% fat content or more but not more than 95% by weight of milk solid content of the milk not exceeding 2% by weight and of water not exceeding 16% by weight. The butter must not contain added emulsifiers but may contain chloride sodium, food colors, neutralization salts and lactic acid bacteria cultures harmless.

COFEPRIS sets the regulations in concern of health matter for the Mexican population.**

For example:

Prohibited or Restricted Ingredients in **Food Supplements:**

- Procaine
- Ephedrine
- Yohimbina
- Germanium
- Animal or human hormones
- Substances with pharmacological action
- Nor those that present a health risk
- Plants which are not permitted for infusions or teas, according to point one of the Agreement determining the plants which are prohibited or permitted for teas, infusions and edible vegetable oils (OJF, 15/12/1999)

*Mexican Law of General Taxes on Imports and Exports. Page 17.

**Federal Commission for the Protection of Health Risks from the Ministry of Health.

International trade: Tariff restrictions

The Internationally-used **Harmonized System (HS)** comprises about 5,000 commodity groups, organized in a hierarchical structure by sections.

- chapters (2 digits)
- headings (4 digits)
- sub-headings (6 digits)

Different than in The Netherlands, the 8th digit is called the *tariff fraction*, which is the one that finally **determines the entry barriers to Mexico** in terms of cost in customs or in terms of labeling, animal health certificates, etc. depending on each product.

When the tariff fraction is clearly marked, it is possible to know if the product that will be exported to Mexico has tariff preferences or can benefit from another treaty, such as the EU-MX Trade Agreement.

The best suggestion is to seek professional advice from:

- Customs agent
- Shipping companies
- Local Import Partners

Detailed example of the HS code used in Mexico for the import of Gouda cheese:

0406.90.04

which import duty is 20% according to the *LIGIE*.*

HS CODE FOR GOUDA CHEESE	0406.90.04	
CHAPTER	04	Dairy produce; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included
HEADING	06	Cheese and curd
SUBHEADING	90	Dairy produce: cheese (not grated, powdered or processed),
TARIFF CODE	04	Grana or Parmegiano-Reggiano, of a fat content by weight not exceeding 40%, with a water content by weight in the non-fatty matter not exceeding 47%; Danbo, Edam, Fontal, Fontina, Fynbo, Gouda, Havarti, Maribo, Samsoe, Esrom, Italico, Kernhem, Saint-Nectaire, Saint-Paulin or Taleggio, of a fat content, by weight, not exceeding 40%, and a water content, by weight, in the non-fatty matter exceeding 47% but not exceeding 72%.

*Law on General Taxes on Imports and Exports

International trade: Non-tariff restrictions

-> Product labelling

Labelling adaptation is a **MUST** in compliance with NOM-051; a federal regulation that seeks to provide the population with clearer nutritional information for healthier decisions in their lifestyle. Consider if there should be special modifications to the package tailored to the Mexican requirements or distribution channel.

This includes characteristics and definitions of:

- ingredients
- suggested daily intake
- units of measurement
- references to nutritional values
- portion values
- best-before date
- expiration date, among others to considerate.

Here is an example of Canadian cookies. The original language of the package is Canadian French. Original packaging was not modified, rather a label in Spanish was added to meet the requirements of NOM-051.

Observations:

- Spanish is mandatory
- The sentence indicating the country of origin must be as follows:
 - Hecho en... (made in) Producto de... (product from)
 - Fabricado en... (produced in)
- Official document (Spanish): <http://bit.ly/NOM-051>, on following the *Norma Oficial Mexicana NOM-051-SCFI/SSA1-2010*.



International trade: New EU-Mexico Free Trade Agreement

The new deal will:

- Scrap high Mexican tariffs on European food and drinks;
- Allow EU firms to sell more services to Mexico;
- Pledge to protect workers' rights and the environment;

The modernized treaty will cover farm products, investment, and government procurement. Practically, the majority of tariff on goods will drop to 0%, including products like Mexican chicken and European dairy products. **The products that benefit most are agricultural exports from the EU to Mexico such as poultry, cheese, chocolate, pasta, and pork.**

Until January 2020, there is no established official date for the trade agreement to be ratified, hence information of the tariff drop, and its terms is not determined yet.

New EU-MX Trade Agreement: Official proposals that have been discussed concerning the food sector

Tariffs will be eliminated on a range of products. Examples are pasta (currently up to 20%) and chocolate (up to 20%).

Duty-free conditions on almost all pork products. This will allow the EU to significantly increase pork export to Mexico.

Preferential access for European cheeses. Cheeses like Roquefort and Gorgonzola (currently 20% tariff). In addition, other cheeses that are not included will be given preferential access with annual quotas on allowed import.

A securement of export of 30,000 tons of milk powder from the EU to Mexico in the first year of the treaty coming into force. This will increase to 50,000 tons in five years.

There will be measures to protect against the imitation of 340 distinctive European foods and drink products in Mexico. (Including, e.g.: Comté cheese (France) or Szegedi szalámi (Hungary), which all have a Denomination of Origin status.

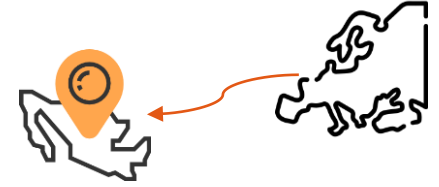
International trade: Transportation

Along its 11,500 km of coastline, Mexico has 117 functional ports. Due to the geographic location, ports in the Gulf are the most common for European & African trade matter.

The port of Veracruz is the most used for its infrastructure, capacity and its connections to other states of the country and the main metropolitan areas. However, the volume of its large operations may cause a delay in activities. For this reason, Tuxpan, Altamira & Progreso are other suggested destination ports for European goods.

Concerning transportation within the country:

1. Transportation by rail is generally for bulk goods
2. Mexico has a modern highway system, primarily comprising toll roads, connecting the main industrial areas located in the Mexico City–Guadalajara–Monterrey triangle with large seaports. The Mexican ministry responsible for this, has a large database and interactive up-to-date map with highways and roads.
3. Highways between the port of Veracruz & Tuxpan, Veracruz are efficient in terms of route, costs, maintenance, security and support.



Estimated transportation time from Rotterdam, NL to Veracruz, MEX:

18-23 days depending on the shipping company*

*A new route is being created for maximizing profits and benefits due to shorter transportation time. It is intended to be a 14 days-route. This is being developed and not yet confirmed. When available, this will be a great opportunity for both importers and exporters of the food sector.

TRANSPORTATION ROUTES TO MEXICO AND WITHIN THE COUNTRY



Welkom in Mexico!

A thorough market scan in Mexico will clarify the specific conditions in the market for your products, including import barriers, logistics and labelling restrictions. You will also have identified the best places to sell your selected products. This contributes to a well-defined marketing strategy. Crucial for a successful entry, as Mexico is a large and diverse country with unique market requirements.

A brief checklist has been prepared to serve as a guide for Dutch businesses interested in exporting to Mexico:

Interested? The complete market investigation is available for consultation.

MEXICO IS OUR NEXT EXPORT DESTINATION

1. IN THE NETHERLANDS:



WHICH OF MY PRODUCTS WILL ADD VALUE TO THE LIVES OF MEXICAN CONSUMERS?

Review your product portfolio

- ☐ Is the product allowed to be imported in Mexico?
- ☐ Does it benefit from the EU-MX free-trade agreement in terms of tariff %?
- ☐ On non-tariff restrictions (sanitary regulations, certifications, etc). Does it meet all the requirements?

2. PREPARING THE FIRST VISIT:



HOW TO GET TO MEXICO?

Where do I want to start in Mexico and why? (Important to define it as it is a large and diverse country).

- ☐ Transportation-related costs from NL to the final place of destination. (If possible, try to align to real quotations considering the costs that may occur in Mexico).

Also, ideally to be done:

- ☐ Match the visit with a
 - Trade mission
 - Trade show
- ☐ Have pre-arranged meetings in the city of your interest
- ☐ Visit points of sale to understand the dynamics of the market (customers and competitors)

3. SUGGESTION:



DO A SMALL TESTING SHIPMENT

The objective is to verify:

- ☐ Proper documentation prepared in compliance with the requirements
- ☐ Correct labeling requirements
- ☐ Correct packaging to withstand the transportation
- ☐ Transportation mode suggested: **By air**

A sample shipment may seem a high-cost or unnecessary step, but it will allow you to identify hurdles you may have missed, hence saving you lots of money

EXTRA ADVICE:

- SAT (Federal Tax Administration Service) is a very strict organization. If you fail to meet one of the established requirements, your shipment will be denied access to Mexico and/or retained. Please carefully verify all the details are correct to avoid problems
- Key-relationships are crucial for doing business
- The concept of time is different between Mexico and The Netherlands, be patient
- In Mexican culture, directness is not particularly valued and sometimes even perceived as rude. Be careful in your communications
- Make sure you have a clear contract/sales agreement that is verified by a Mexican lawyer

Holland House Mexico

Agri-food & Horticulture Sector

2020