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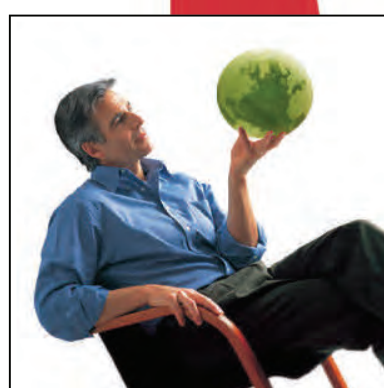
MARKET ANALYSIS REPORT | MARCH 2013

The Modern Mexican Consumer

Behaviour, Attitudes and Perceptions Toward Food Products

Source: *© A. Barrera, 2011*



Growing Forward

Canada

INTRODUCTION

Mexico is home to 112 million inhabitants (Instituto Nacional de Estadística y Geografía INEGI, 2010) and is Latin America's second-largest economy, behind Brazil. The implementation of the North American Free Trade Agreement (NAFTA), along with a series of open macroeconomic policies during the late-1990s and 2000s, have led Mexico's economy into consistent and steady growth. However, the country's dependence on trade with the U.S., and the effects of the 2008 global economic recession, harmed the Mexican economy. In 2009, the country suffered its deepest recession since the mid-1990s, experiencing a decrease in Gross Domestic Product (GDP) of 6%. The Mexican economy has since recovered, resulting in GDP growth of 5.4% and 3.9% in 2010 and 2011 respectively, but the lingering effects of the economic recession pose significant difficulties for the Mexican economy and its people.

Growing levels of education have led to higher-paying jobs and consequently higher purchasing power for Mexican consumers. Mexicans are also increasingly time-poor, allocating less time for buying, preparing and cooking food. Access to more affordable food and a wider variety of products, including better access to packaged food, are also factors that have contributed to Mexicans' new consumption preferences. These changes in consumption patterns are not only being reflected in their grocery carts but in their health as well. There has been an increase in the number of Mexicans diagnosed with type two diabetes, and children's obesity is at an historic high. This report provides information on the modern Mexican consumer, current preferences, and how new trends, such as a focus on health and wellness, are emerging in the country.

INSIDE THIS ISSUE

DID YOU KNOW?

- 70% of Mexico's population is overweight or obese (National Health and Nutrition Survey, 2006).
- Mexico has the highest proportion of overweight and obese children in the world.
- As part of its campaign against obesity, the Health Ministry has launched a twitter account, providing Mexicans with information on healthier living. [twitter.com/SSalud_mx]
- Products that are considered healthy and beneficial will continue to gain popularity as Mexicans seek to improve their lifestyle and health.

GLOBAL TRADE POSITION

- Mexico has the 12th-largest economy in the world and the second-biggest economy in Latin America, with a GDP of US$1.18 trillion in 2011.

- Mexico has 12 trade agreements with over 44 countries. Despite having these agreements, three quarters of Mexico's trade activities take place with the U.S. Other main trading partners include: Canada, Chile, Japan, and the European Union (E.U.). Main trading partners not involved in a formal trade agreement include China and Brazil (Economia, 2011).

- Agriculture employs 13.7% of the labour force, and agricultural exports account for 10% of GDP. Main agricultural exports to the world include vegetables, beer made from malt, fruit and nuts, sugars, and baking-related items.

- Canada was Mexico's second-largest supplier of agri-food products, exporting over US$1.7 billion in 2011. Key supplying countries of agri-food products in 2011 were the U.S., Canada, Chile, and China.

- Top agri-food exports from Canada (2011) to Mexico were canola, non-durum wheat, fresh boneless beef, canola oil, and canary seed, while top seafood exports were capelin, whalebone, herring and mackerel.

- Canada's top agri-food imports from Mexico (2011) were tomatoes, peppers, raspberries, avocados and beer.

ECONOMY

- Mexico has had strong economic recovery following the global economic recession. Consumer confidence continues to grow, and measured 94.0% in September 2012 (Bank of Mexico and the Instituto Nacional de Estadística y Geografía).

- As can be seen in the chart below, forecasts for the Mexican economy are positive. The analysts at the Economist Intelligence Unit (EIU) envision an average annual GDP growth of 3.7% in 2012-16. (Economist Intelligence Unit 2012). According to Euromonitor, expenditure is expected to grow 3.3% by 2013. However, Mexico's integration into the American economy will always leave its economy vulnerable to any changes that might happen in the U.S.

Mexico, Population, Income and Market Size – Historic/Forecast

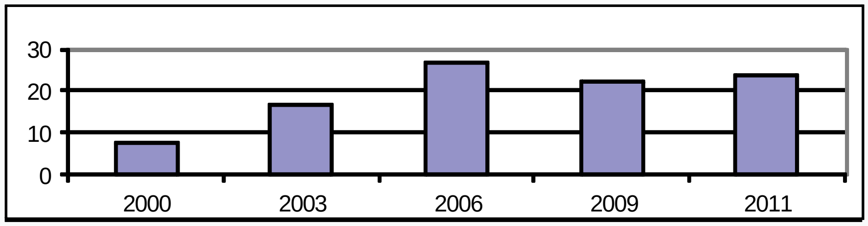
Category	2008	2009	2010	2011	2012**	2013
Population ('000)	106,684.4	107,787.2	108,996.9	110,195.3	111,315.8	112,368.8
Total GDP (US$ Millions)	1,118,244.0	1,051,664.4	1,109,707.7	1,153,397.3	1,200,026.9	1,240,827.8
GDP measured at PPP* (US$ Millions)	1,548,202.3	1,468,296.4	1,565,567.8	1,661,144.4	1,718,305.1	1,807,930.9
Real GDP growth (%)	1.2	-6.0	5.5	3.9	4.0	3.4
GDP per capita (US$)	10,481.8	9,756.9	10,181.1	10,466.8	10,780.4	11,042.5
GDP per capita at PPP (US$)	64.5	65.7	65.3	64.8	65.4	65.1
Consumer expenditure (US$)	716,818.1	678,990.6	710,905.2	747,876.2	776,386.0	802,589.8

Source: *Euromonitor, 2012.*
** Purchasing Power Parity.*
*****All 2012 data is provisional and based on part-year estimates.***

REMITTANCES

- Remittances are one of the most important sources of income for Mexicans. Remittances are monies sent by Mexican immigrants, working mostly in the U.S., to their families. As can be seen in the chart below, the Central Bank estimates that remittances sent to Mexico totaled more than US$ 23 billion in 2011. There is a large Mexican diaspora living in the United States, and many within this community send monthly deposits to their families back home (Urban Institute). This additional source of income for Mexican families provides a livelihood for them and allows them to purchase goods that would otherwise be unaffordable.

U.S. Remittances to Mexico, 2000-2011 (US$ Billions)



Source: *Mexico Central Bank, 2012.*

DEMOGRAPHICS

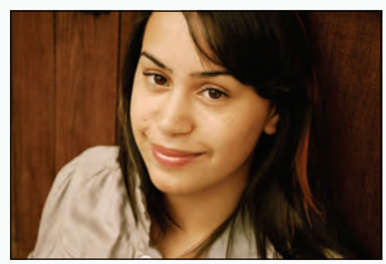
Population

- The Mexican population has increased rapidly, with an average steady growth rate of 1.3% per year over the past two decades. Fertility rates are stagnating, but are still high in rural areas and among the native population (Central Intelligence Agency World Factbook, 2012).

- Migration to the United States and Canada has also become significant, with the number of Mexican citizens residing abroad reaching as high as nine million (Planet Retail).

- As of mid-2011, 65.2% of the Mexican population was between 15 and 64 years of age, and the country's median age was 28 year (Euromonitor, 2012).

- Mexico's large youth population has led to an increasingly urbanized country, with the majority of inhabitants living in urban centers.



Source: *Shutterstock.*

- Mexico City is by far the largest city in the country, with a population of 8.7 million people in its federal district, and roughly 20 million inhabitants in the surrounding metropolitan area (Planet Retail, 2012). Other large cities include: Ecatepec (1.7 million); Guadalajara (1.56 million); Puebla (1.5 million); and Juarez (1.3 million).

Population by age

- 53% of the population is under 30 years old. Overall, the number of babies and children age 9 to 12 is expected to decrease significantly over the next two decades, as a result of young Mexicans deciding to postpone having families until after they have reached 30 years of age, and to have smaller families (Euromonitor, 2012).

- The number of pensioners (Mexicans over 65 years old) is expected to grow by 49% by 2020. This is a result of high fertility rates during the 1940s and an increase in life expectancy. In 2011, life expectancy at birth was 78.1 years for women and 73.4 years for men (Instituto Nacional de Estadistica).

DEMOGRAPHICS (continued)

Ethnicity

- The ethnicity of most Mexicans is comprised of a mixture of indigenous and Spanish ancestry. Cultural traits of both indigenous and European communities have been incorporated into the Mexican culture and culinary tradition.

- The National Statistics Institute (Instituto Nacional de Estadistica) has defined the category of indigenous to include only people that speak one of the 62 indigenous languages. In 2009, there were 14 million indigenous people belonging to states in central and southern Mexico. Indigenous communities in Mexico tend to show higher fertility, mortality and migration rates. They also earn significantly less than other Mexicans and are considered to be among the poorest people in Mexico. Government programs have been designed to be more inclusive of indigenous people and provide services, basic products, and fortified foods to help indigenous communities. Improvements have also been made to living conditions.

Education

- Public education is administered by state and federal governments and is free to all. Basic education, from pre-primary school (3-5 years old) to lower-secondary school (for youth aged 13-15 years old), is mandatory. Upper-secondary education (high school equivalent, for youth aged 15-18 years old) is available from the state, but has low enrolment and completion rates, as teenagers are often forced to leave school to help support their families.

- According to Datamonitor, Mexico has increased its investment in education over the past 15 years, largely in response to the growing population, which has produced more students than in the past. The most recent data from the Organization for Economic Co-operation and Development (OECD, 2007) showed the Mexican government spent 21.6% of total expenditures on education, with 38% going toward primary education, 29% toward lower-secondary education, and 18% toward upper-secondary education.

- The literacy rate for Mexico's population aged 15 years or older is 93.8% (Euromonitor, 2010). As more Mexicans attain higher education levels, opportunities for better-paying jobs will increase, which will have an impact on food consumption patterns.

Households

- There were 29 million households in Mexico in 2011, of which 78% were located in urban areas. The number of recorded households has been increasing at an average rate of 2.6% every year since 2006 and is expected to reach 31 million households by 2015 (Euromonitor, 2012).

- As can be seen in the chart "Mexico Households by Type (2011)," couples with children represented 37% of all households followed by single-parent families (18) and couples without children (14%). Single households represented only 11% of all households.

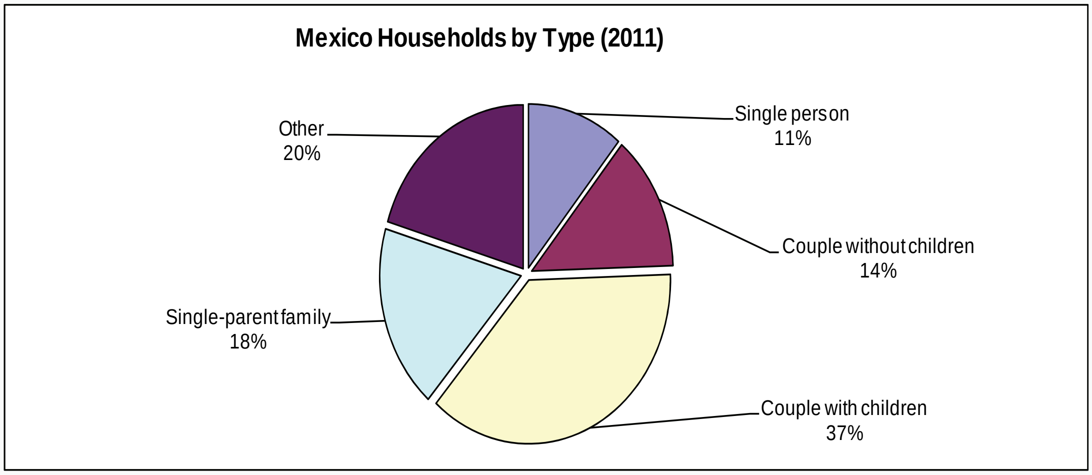
Source: *Shutterstock.*

- Disposable incomes in Mexico have nearly doubled in the last decade and continue to increase on a yearly basis. GDP per capita grew to US$10,466.8 in 2011, and is expected to grow to US$11,652.8 by 2014 (Euromonitor, 2012).

- Income distribution remains highly unequal in Mexico; wealth tends to be concentrated in large metropolitan areas and among a minority of the population. For example, people residing in the northern states, within areas that border the U.S., have enjoyed a higher standard of living than their counterparts in the rural, southern regions, where subsistence agriculture remains the dominant sector.

- Mexico's middle class is larger and has more purchasing power than ever before (Euromonitor, 2012).

DEMOGRAPHICS (continued)



Source: *Euromonitor, 2012.*

Health and lifestyle

- According to the Organisation for Economic Co-operation and Development (OECD), Mexico became the most overweight and obese nation in the world in 2010, surpassing the United States. The Mexican Ministry of Health has reported that 69.5% of Mexico's adult population is either overweight or obese. Moreover, child obesity is of great concern. Statistics from Mexico's National Institute for Public Health show an increase in the child obesity rate from 18.4% in 1999, to 26.2% in 2006, representing yearly growth of 1.1%. Mexico is now considered to have the highest rate of child obesity in the world.

- The Ministry of Health estimates that 10% of the Mexican population suffers from diabetes, making it the leading cause of mortality, loss of limb, and blindness.

- Many low-income, Mexican consumers are not familiar with the benefits of healthier foods or broader nutritional information and, for the most part, cannot afford to pay premiums on products in this sector. Packaged food and fast food, which are generally cheap and convenient, frequently replace whole meals. However, a number of factors are gradually moving the Mexican consumer toward healthier options.

- According to Euromonitor, health concerns related to excess weight, obesity, and diabetes in Mexico are forcing companies to reformulate or adapt their food products. Some items, for example, are now being offered with reduced fat and sugar or increased fibre. Larger players in the market are further expanding their presence in the healthy foods sector, trying to make affordable products.

- The Mexican government has been taking a step-by-step approach to changing eating habits in Mexico by educating the population and broadening the availability of inexpensive, healthy foods. The main challenge lies not only in educating young consumers, but also in making healthy foods affordable to all.

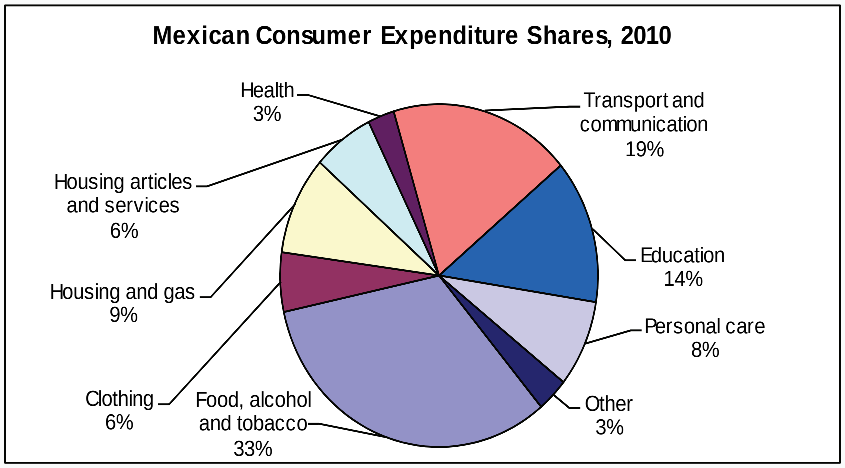
- In 2009, a law came into effect regulating the advertising of junk food in the mass media, and is expected to regulate the amount of advertising directed toward children. In August 2010, a new law to prohibit the sale of junk food in elementary and secondary schools was implemented, along with a mandatory 30 minutes of daily exercise on school grounds (Diario Oficial, August 2012). While the new laws are now in effect, it's important to note that much work is still needed by local authorities to make sure this law is reinforced and becomes common practice throughout the country. *(Please refer to the AAFC Report "Health and Wellness Trends in Mexico" [April 2010] for more details).*

CONSUMPTION AND EXPENDITURES

- Per-capita consumer expenditures recorded a significant decline between 2008 and 2009, due to the global economic recession. Since then, per capita consumer expenditure has grown slightly, reaching US$6,939.7 in 2011; it is expected to reach US$7,238.5 in 2013 (Euromonitor, 2012).

- Mexicans continue to spend money on alcohol and tobacco, telecommunications, and health products and services. In 2010, food, alcohol and tobacco were the main purchases for consumers, accounting for almost one-third of Mexican consumer expenditures. Transportation and communication were second, with 19% of expenditures, followed closely by education (14%).

- Due to the economic recession of 2008-2009, Mexicans have limited their expenditures to basic goods, trading in brand names for less expensive options. Non-essential items, such as clothing, saw the largest decline during the economic crisis. In 2010, this category only occupied 6% of overall consumer expenditure.



Source: *INEGI 2012.*

- While income has been reduced for younger Mexican consumers as a consequence of the world recession, Mexicans are expected to become wealthier as education levels rise, more women enter the labour force, and Mexicans have fewer children. These changes will help increase the potential for consumer expenditure, allowing for greater spending on clothing and other luxury items.

- Fresh food remains a fundamental part of the diet, as homemade meals are still preferred by Mexicans, being both less expensive and more traditional. Typically, Mexicans purchase fresh food at local retailers' and wholesalers' open markets, where there is a variety of products in one place. The establishment of supermarkets and hypermarkets throughout the country has led more and more Mexican consumers to change their shopping venues. Additionally, the various discounts that supermarkets/hypermarkets offer regularly are more attractive for cash-strapped consumers.

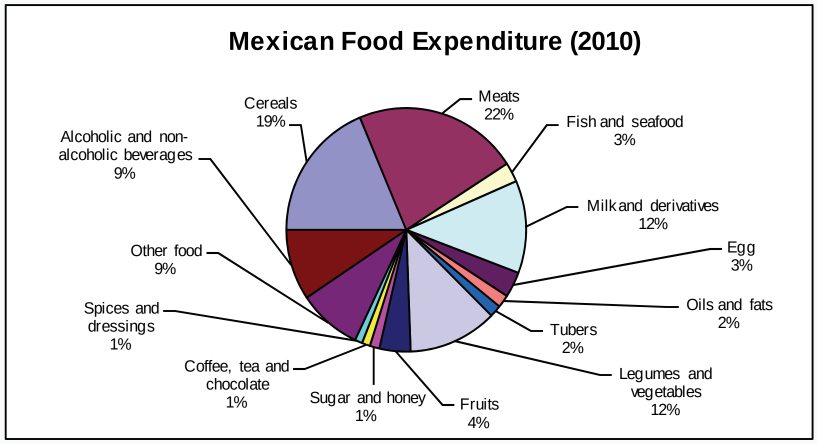
- For the majority of Mexicans, eating out in restaurants or fast food chains is still considered expensive. Cheaper foods sold by street vendors are often seen as unhealthy and less attractive, especially since the government continues to promote the consumption of fresh food as the best measure to avoid being overweight and obese.

- Despite the importance of fresh food in the Mexican diet, packaged and industrialized food experienced higher growth than fresh food, as people have less time for buying, preparing and cooking food, especially in urban areas. This can be explained by the increasing size of the working population, the decreasing number of members per household, the increasing purchasing power of children, and the sizeable proportion of the aging population. Thus, many Mexicans from all income segments are now replacing whole meals with packaged food, which is not only cheap and convenient but widely available at different retail outlets across the nation.

▶ CONSUMPTION AND EXPENDITURES (continued)

- Packaged food sales increased by 3.7% in 2011, bakery products increased 4.1%, dairy increased 4.0%, and oils and fats increased 4.9%. Packaged and processed foods are convenient and economical for young Mexicans, but they tend to be high-calorie meals that also contain high levels of sugar and saturated fats.

- Young consumers are an increasingly important segment, due to socio-economic shifts in the marketplace. For example, smaller families and more women in the workforce generate more disposable income for families, but mean less time to prepare meals. This is leading consumers to buy products that are easy and quick-to-prepare, as well as packaged and ready-to-eat meals.



Source: *INEGI, 2012.*

- Ortiz-Hernández and Gómez-Tello (2008) found that among Mexican adolescents 12-19 years of age, only one-third consumed fruits and vegetables daily, about half consumed dairy products on a daily basis, and one-fifth consumed sweet and salty snacks daily.

- Low-income families who face budgetary challenges tend to consume fewer fresh foods, which are generally more expensive. Instead, they tend to choose packaged foods that are lower in price but typically less nutritious.

- Mexican consumers are loyal to familiar established brands where new products are simply variations of flavours or fillings. However, strategic, value-conscious shopping on the part of consumers has led to wider offerings of cheaper and private label brands by manufacturers. Consequently, private label and lower-priced brands are slowly gaining favour with price-conscious consumers.

▶ TASTES AND PREFERENCES

- Mexican consumers enjoy traditional meals and dishes, which offer a combination of indigenous (both Mayan and Aztec) and Spanish flavours.

- Corn is a staple food used for tortillas and tamales, which are accompanied by rice and beans.

- Traditional meals use chillies (hot peppers), tortillas, salsas and rich sauces, which complement dishes with spicy flavours. Salsas can have a red tomato base with chipotle and onion or a tomatillo (green tomato) base, with other chillies, such as jalapeño, and, in some cases, avocado.

▶ EMERGING TRENDS

Organics

- Mexico's organic marketplace is still in its development stage. In the past, only medium- to high-income consumers with a higher purchasing power bought organic products. Now, however, more Mexican consumers are interested in purchasing organic products as they learn about their perceived benefits and as more organic products are offered at a more accessible price.

- The market value for organic packaged food and organic beverages reached US$157.4 million in 2010. It has experienced a CAGR of 18.1% since 2007, and is expected to continue growing at an average rate of 15.4% over the next four years. The market size in 2015 is forecast to reach US$311.2 million, with over one half belonging to organic packaged food.

Organic Retail Market Sizes, US$ millions, Historic/Forecast, Fixed 2012 Exchange Rates

Category	2010	2011	2012*	2013	2014	2015
Organic beverages	7.0	9.3	11.5	14.2	17.6	21.7
Organic packaged food	150.4	167.1	191.3	219.1	252.9	289.6
Total	157.4	176.5	202.8	233.3	270.5	311.2

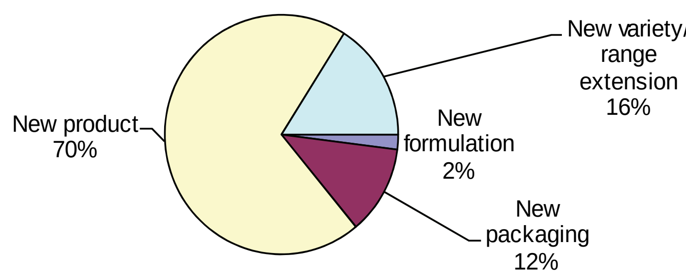
Source: *Euromonitor, 2012. *All 2012 data is provisional and based on part-year estimates.*

- Most of the imported organic food products available in the Mexican market are processed food products. The main imported organic food products are bakery products, dairy products, beverages, general grocery items (cereals, sauces oils, tofu, seasoning, etc.) desserts and sweet products, and ready-to-eat pulses and seeds (flax, rice, beans, etc.).

- Between January 2011 and January 2012, Mintel International registered 100 products introduced into the marketplace with the claim "organic." The majority of these products were new, while the rest were new varieties, new packaging and new formulations.

- These new products were mostly present in the sauces and seasonings, snacks and sweet spreads, dairy, and baby foods categories.

Organic Products by Launch Type, January 2011 - January 2012



Source: *Mintel, 2012.*

Better-for-you foods

- Overall, the Mexican better-for-you market's retail sales amounted to US$3.4 billion in 2010. "Reduced carbohydrate" packaged food experienced the largest growth in this category, with a 27.8% increase in value from 2009 to 2010. Packaged food carrying claims of reduced fat, reduced salt and reduced sugar all saw moderate growth of 6.6% on average.

- The sub-category of reduced sugar packaged food and reduced fat packaged food were the biggest in terms of value sales amongst the better-for-you category.

- The Mexican government's new laws prohibiting the sale of junk food in all elementary schools to prevent childhood obesity may be beneficial for better-for-you products. Companies are now seeking ways to sell improved and healthier versions of their snacks to children, as this new generation of consumers seeks healthier products. Manufacturers are having to create new products, with many of them focusing on reduced sugar, fat, salt and carbohydrates to attract health-oriented consumers.

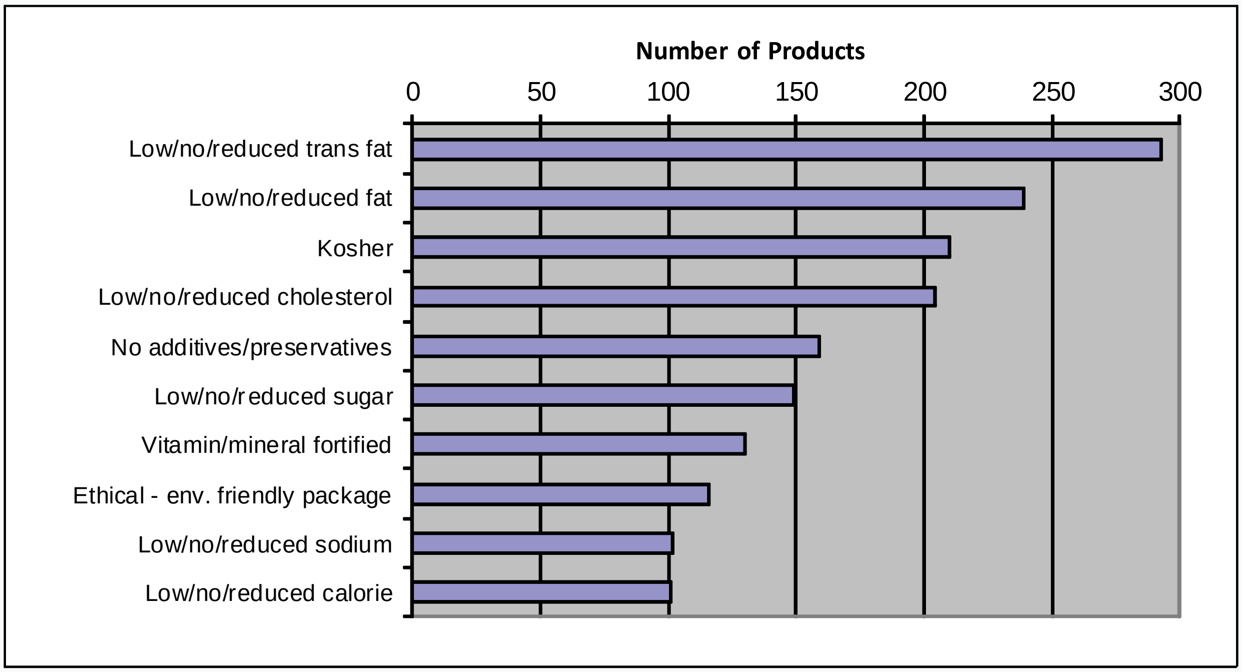
▶ EMERGING TRENDS (continued)

Better-for-You Retail Market Sizes, US$ millions, Historical/Forecast, Fixed 2012 Exchange Rates

Category	2010	2011	2012*	2013	2014	2015
Better-for-you beverages	2,091.5	2,257.6	2,399.0	2,528.8	2,654.1	2,778.3
Better-for-you packaged food	1,375.5	1,425.7	1,473.3	1,551.0	1,636.4	1,729.8
Total	3,467.0	3,683.3	3,872.3	4,079.7	4,290.5	4,508.2

Source: *Euromonitor, 2012.* *******_All 2012 data is provisional and based on part-year estimates_

Better-For-You Products Launched Between January 2011 and January 2012, By Claim



Source: *Mintel, 2012.*

- According to Mintel, a total of 777 products with a “better for you” claim were introduced into the Mexican marketplace between January 2010 and January 2011. Most products were in the category of low/no/reduced trans fat. Low/no/reduced fat and kosher were also among the top five claims.

Public Plaza, Puebla, Mexico. ***Source:*** *© A. Barrera, 2011.*

EMERGING TRENDS (continued)

Functional/fortified foods

- The Mexican fortified/functional retail market sales totaled US$13 billion in 2010.This sector has seen stable growth over the past few years and is expected to continue to grow at a CAGR of 3.3% until 2015.

- Mexican consumers are attracted to the value-added that comes from fortified/functional packaged food. The power of brands and brand loyalty in Mexico has been historically strong. In 2010, three large companies led fortified/functional packaged food, namely Nestlé, with 16% value share of the market, Industrial Lala with 11%, and Panificación Bimbo with 10%.

- The most popular sub-categories in this sector are the products offering health claims, such as relief of constipation and digestive benefits. Products such as Lala Vive con Fibra (live with fibre) or functional/ fortified yogurts from Grupo Industrial Lala, are very popular.

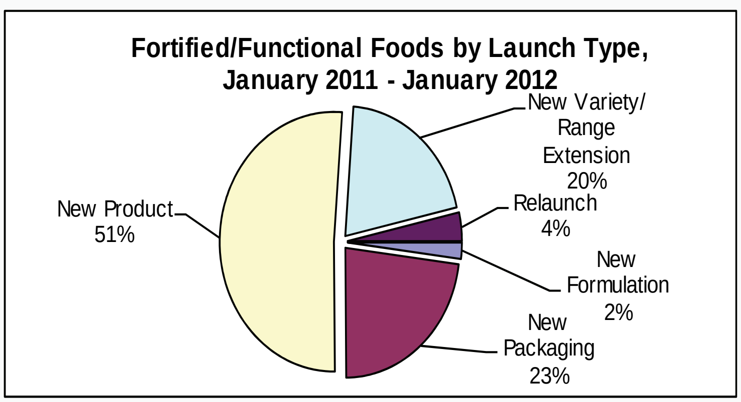
- Of the products offering digestive health claims, cold cereals, drinking yogurts, and snacks/cereal/energy bars were the most popular.

Fortified/Functional Retail Market Sizes, US$ millions, Historic/Forecast, Fixed 2012 Exchange Rates

Category	2010	2011	2012*	2013	2014	2015
Fortified/functional beverages	2,662.1	*2,927.8*	3,143.2	3,354.6	3,569.0	3,787.1
Fortified/functional packaged food	10,384.9	*10,701.0*	10,907.9	11,189.4	11,459.8	11,722.8
Total	13,047.0	*13,628.8*	14,051.1	14,544.1	15,028.8	15,510.0

Source: *Euromonitor, 2012. *All 2012 data is provisional and based on part-year estimates.*

NEW PRODUCTS



- According to Mintel, a total of 197 products were introduced into the Mexican market between January 2011 and January 2012 with a functional claim such as antioxidant, prebiotic, or for weight and muscle gain.

Top Five Functional Foods by Claim, January 2011 to January 2012

Sub-Category	Number of Products
Cold cereals	21
Drinking yogurts and liquid cultured milk	16
Snack/cereal/energy bars	16
Sweet biscuits/cookies	13
Nuts	9

Source for both: *Mintel, 2012.*

CONCLUSIONS

- Mexican consumers have more purchasing power but are also increasingly time-poor. Despite their general preference for fresh foods, consumers are seeking products that are quick, easy and convenient to prepare.

- The rise in overweight and obese Mexicans has prompted the government to take action by encouraging and promoting a healthy lifestyle, with a balanced diet and regular exercise, and by introducing new laws prohibiting the sale of junk food in elementary schools and their surroundings.

- The increase in health problems and illnesses amongst the Mexican population and particularly amongst children has pushed consumers to look for healthier food options. Demand for better-for-you and functional food products, particularly those tailored to consumers with weight-related illnesses, will continue to grow.

- Healthy lifestyle trends are expected to become more popular. Emerging trends, such as organic food, are still in their early development stages. The high cost of organic products makes them unaffordable to most Mexican consumers. Companies introducing products at a more competitive or discounted price will benefit from these trends and will gain customers looking to for more affordable products.

- Increasingly, newly launched products include better-for-you and functional food claims. Companies looking to increase or maintain their market share could benefit by offering new, healthier formats of existing products, such as “reduced fat” or “reduced sugar” versions.

- Overall, demand for products that are considered healthy and beneficial will continue to rise, as Mexicans seek to improve their lifestyle and health.

DEFINITIONS

This report analyzes the market for health and wellness food and beverages in Mexico. For the purposes of this study, the market has been defined as follows:

- *Functional/Fortified Foods* – Items to which health ingredients have been added. These functional foods and beverages should have a specific physiological function and/or be enhanced with added ingredients not normally found in the product, providing health benefits beyond their nutritional value. The categories covered in this segment are: added calcium, functional digestive, functional immune system, functional bone health, and vitamin/mineral fortified.

- *Better-for-You Foods* – This category includes packaged food and beverage products where the amount of a substance considered to be less healthy (fat, sugar, salt, carbohydrates) has been actively reduced during production. To qualify for inclusion in this category, the “less healthy” element of the food stuff needs to have been actively removed or substituted during the processing. This should form part of the positioning/marketing of the product. Products that are naturally fat/sugar/carbohydrate-free are not included. The categories covered in this segment are: low/no/reduced fat, low/no/reduced sugar, low/no/reduced sodium, low/no/reduced glycemic, and no/low/reduced cholesterol.

- *Organic* – Products that are certified organic by an approved certification body. Depending on the country, such products are called “organic”, “biological” or “ecological.”

The above categories are taken from both Euromonitor International and Mintel. These groupings represent globally accepted classification and product identifications for the purpose of data collection.

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