

The enclosed were e-mailed to the following people on September 19, 2003

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International Trade Advisors to the Senate Finance Committee as of September 22, 2003.

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U.S. – MEXICO AGRICULTURE TRADE RELATIONSHIP

The U.S.-Mexico bilateral agricultural relationship is a mature, complex relationship that revolves around products that are sensitive on both sides of the border. Given this, and that Mexico views its bilateral relationship with the United States as one of its most important economic, political and cultural relationships, Mexico continues to seek, in full cooperation with the United States, appropriate solutions to current trade disputes in agricultural products on both sides of the border.

OVERALL TRADE IS GROWING UNDER NAFTA

- ✓ The U.S.-Mexico trade relationship has grown rapidly under NAFTA, providing benefits to both economies.
- ✓ Trade has grown by over 184% since 1993.
- ✓ Even though the US runs increasing trade deficits with Mexico, these deficits are not as large as the deficits with China, Japan, Canada or the EU.

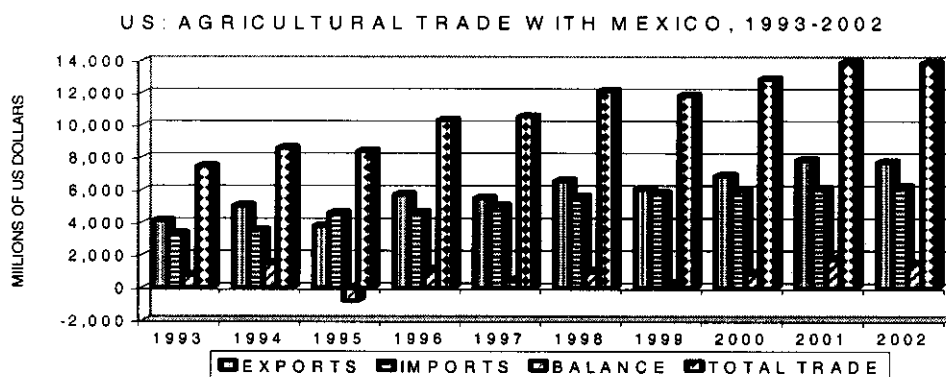
AGRICULTURAL TRADE IS GROWING UNDER NAFTA

- ✓ Under NAFTA, U.S.-Mexico agricultural trade has also flourished, growing more than 86% since 1993.
- ✓ The U.S. agricultural trade surplus with Mexico increased 90% from 1993 to 2002, reaching its highest value in 2001 at \$1.8 billion.
- ✓ Even with faltering economics in both countries in 2002, the U.S. – Mexico bilateral agricultural trade did not diminish.

U.S.-Mexico Agricultural Trade*, 1993 – 2002
(In Million Dollars):

YEAR	EXPORTS	IMPORTS	BALANCE	TOTAL TRADE
1993	4,125	3,328	797	7,453
1994	5,049	3,526	1,523	8,575
1995	3,790	4,585	-795	8,375
1996	5,713	4,607	1,106	10,320
1997	5,502	5,041	461	10,543
1998	6,561	5,573	988	12,134
1999	6,057	5,795	262	11,852
2000	6,892	5,987	905	12,879
2001	7,843	6,065	1,778	13,908
2002	7,676	6,187	1,513	13,887
2002 (Jan-June)	3,618	3,452	166	7,070
2003 (Jan-June)	3,842	3,771	71	7,613

Source: USDA. Note (*) Includes agricultural, fishery & forestry products



AGRICULTURE & NAFTA

- ✓ Like many U.S. Senators and Representatives, many Mexican legislators are highly concerned about bilateral agricultural trade.
- ✓ Agricultural sectors in both countries have identified areas of concern, such as trade in pork, corn, high fructose corn syrup (HFCS), beef, rice, apples, and dry beans, among other agricultural products, that affect their economic positions and markets.

SEVEN AGRICULTURAL PRODUCTS OF PARTICULAR INTEREST THAT HAVE BEEN HIGHLY PROFITABLE TO U.S. INTERESTS

- ✓ In 2002, U.S. exports to Mexico of these seven products totaled \$1.5 billion, a 336% increase over 1993. At the same time, U.S. imports from Mexico of these products totaled a mere \$28 million.
- ✓ The U.S. always has run a large surplus in its trade exchanges with Mexico for these seven products.
- ✓ **PORK:** U.S. exports of pork products to Mexico reached a total of \$174 million in 2001, representing 14% of total U.S. pork exports, a 305% increase over 1993. Mexico is the second largest export market for U.S. pork after Japan.
- ✓ **CORN:** U.S. exports of corn to Mexico reached a total of \$639 million in 2002, representing 13% of total U.S. corn exports, a 747% increase over 1993. Mexico is the second largest export market for U.S. corn after Japan.
- ✓ **HFCS:** U.S. HFCS exports to Mexico, after reaching \$60 million (65% of total U.S. exports) in 1997, declined because of the bilateral dispute over sweeteners. U.S. exports of HFCS to Mexico in 1993 (before NAFTA) were \$7 million.
- ✓ **BEEF:** U.S. exports of beef to Mexico in 2002 reached \$593 million, representing 24% of total beef U.S. exports and a 429% increase over 1993. Mexico is the third largest export market for U.S. beef after Japan and Korea.

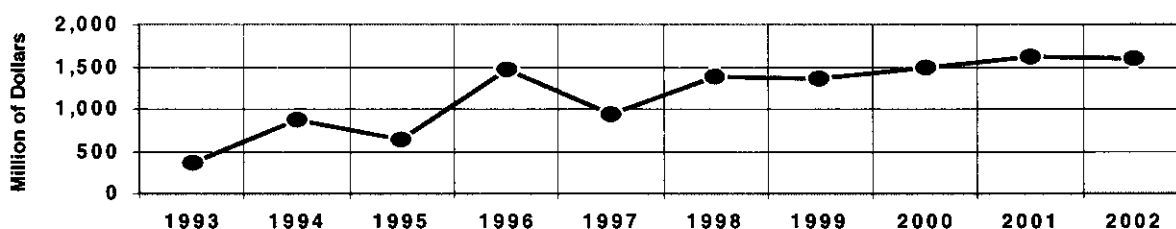
- ✓ **RICE:** U.S. exports of rice to Mexico in 2002 reached \$103 million, representing 13% of total U.S. rice exports, an 87% increase over 1993.
- ✓ **APPLES:** U.S. exports of apples to Mexico in 2001 reached \$118 million, representing 30% of total U.S. apple exports, a 107% increase over 1993. Mexico is the primary market for U.S. apple exports.
- ✓ **DRY BEANS:** U.S. exports of dry beans to Mexico in 2002 reached \$48 million, representing 25% of total U.S. dry beans exports, a 243% increase over 1993. Mexico is the number one market for U.S. dry bean exports.

SEVEN PRODUCTS
U.S. EXPORTS TO MEXICO (IN MILLION DOLLARS)

	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2002*	2003*
PORK	43.3	74.4	24.8	31.9	53.5	83.2	93.8	167.0	174.3	124.1	74.4	63.3
CORN	75.4	373.6	383.0	1,022.7	343.5	610.8	552.0	531.6	625.8	639.2	304.5	295.4
HFCS	7.2	20.1	15.7	47.6	59.6	55.8	53.9	43.3	30.5	1.0	0.5	0.3
BEEF	112.1	227.4	84.7	161.9	297.3	394.2	450.7	507.2	541.8	592.9	290.8	285.7
RICE	55.8	68.1	72.6	94.8	93.3	91.4	87.9	101.4	81.0	103.3	47.0	66.8
APPLES	56.7	87.5	39.8	41.5	43.8	38.5	72.9	102.0	118.1	84.0	67.9	49.2
DRY BEANS	14.2	29.0	11.4	74.4	40.6	115.7	49.8	34.7	42.4	48.0	20.8	10.8
TOTAL	364.7	880.1	632.0	1,474.8	931.6	1,389.6	1,361.0	1,487.2	1,613.9	1,592.5	805.9	771.5

Note: (*) January – June. Source: USDA.

Trade trends in Seven Products
(U.S. Trade with Mexico)



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Arizona Exports to Mexico

	(Million of U.S. Dollars)										% Growth 1993/2002
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	
Agricultural*	106	112	36	64	123	173	186	203	201	219	107%
Other	1,822	2,317	2,111	2,100	2,238	2,821	3,364	4,449	3,380	2,825	55%
Total	1,928	2,429	2,147	2,164	2,361	2,994	3,550	4,652	3,581	3,044	58%

Agricultural*

Other

Total

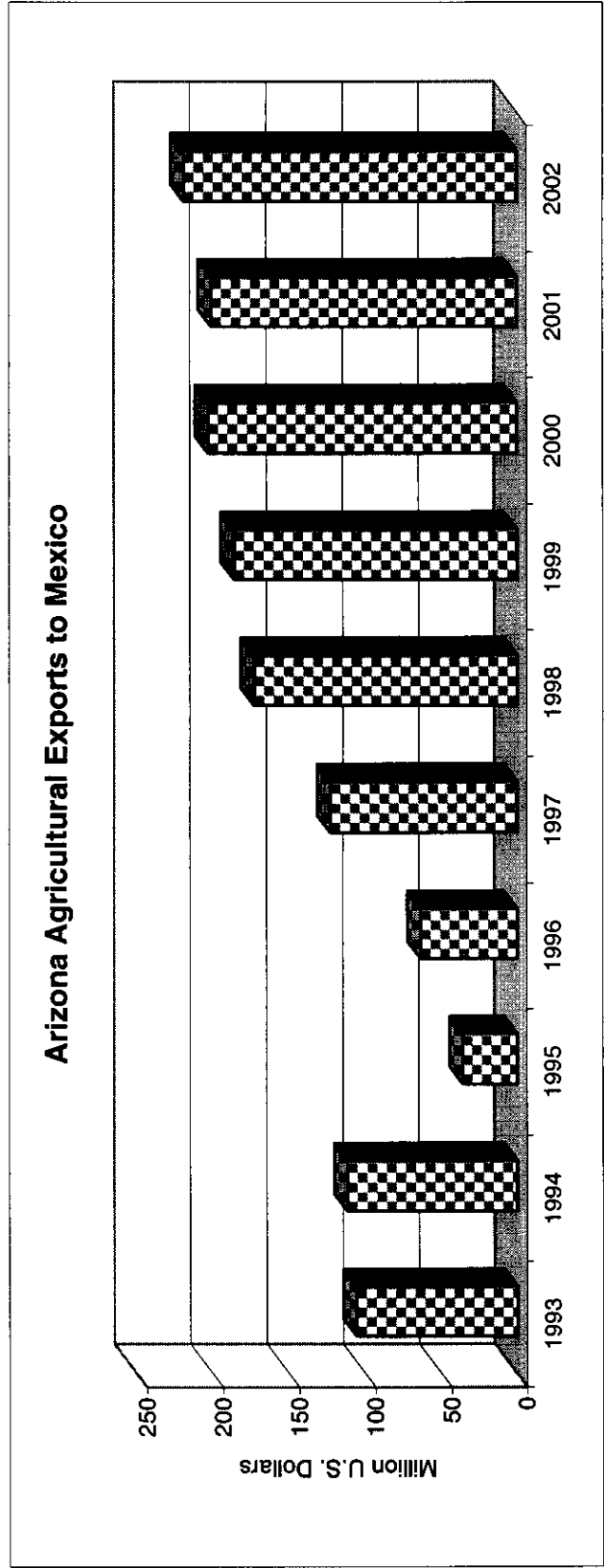
Notes: (*) Export figures 1993-1996 are SIC; 1997-2002 are NAICS classification.

(*) SIC include Agricultural Production-crops, Livestock & Livestock Product; Food & Kindred products.

(*) NAICS include 111 (Agricultural Products); 112 (Livestock & Livestock Products); & 311 (Food & Kindred products).

Source: USDOC.

Arizona's agricultural exports to Mexico have increased 107% under NAFTA, while other exports have grown 55%



Arkansas Exports to Mexico

	(Million of U.S. Dollars)										% Growth 1993/2002
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	
Agricultural*	31	38	35	59	67	60	60	51	52	70	126%
Other	74	123	76	91	247	197	134	150	148	179	142%
Total	105	161	111	150	314	257	194	201	200	249	137%

Agricultural*

Other

Total

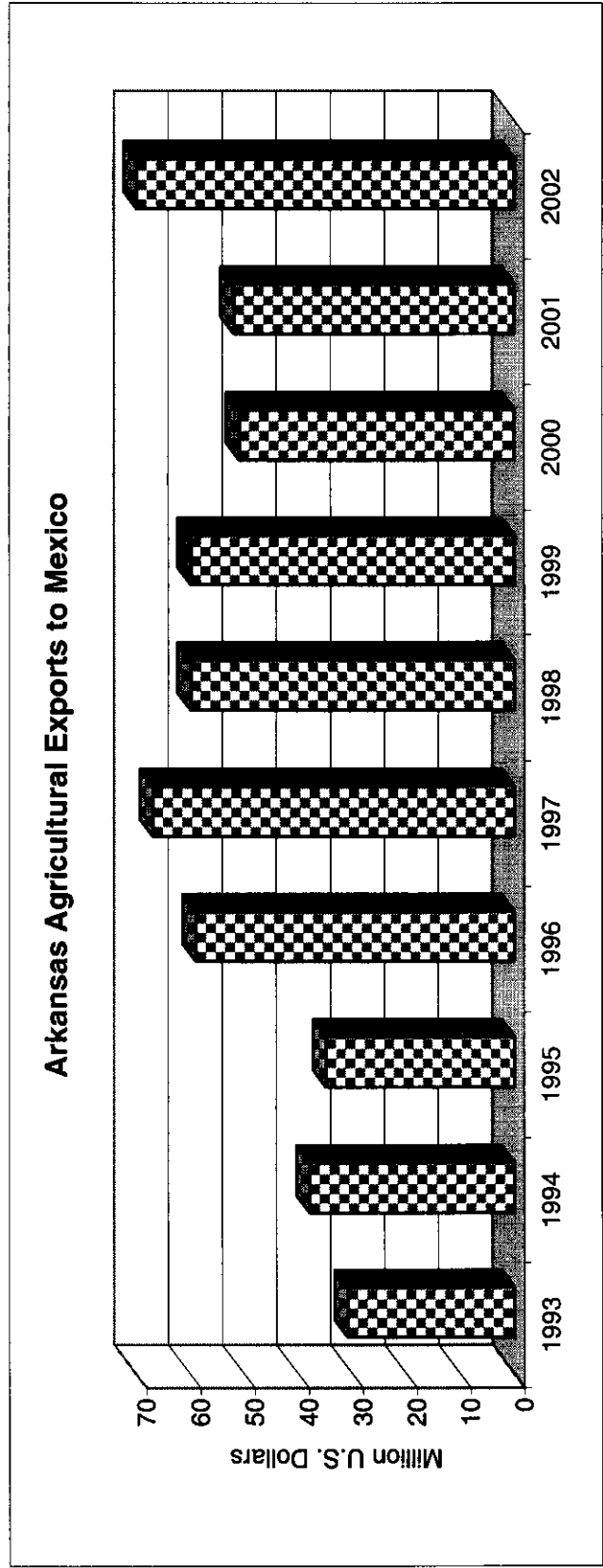
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(*) SIC include Agricultural Production-crops; Livestock & Livestock Product; Food & Kindred products.

(*) NAICS include 111 (Agricultural Products); 112 (Livestock & Livestock Products); & 311 (Food & Kindred products).

Source: USDOC.

Arkansas' agricultural exports to Mexico have increased 126% under NAFTA; while other exports have grown 142%



Florida Exports to Mexico

	(Million of U.S. Dollars)										% Growth	
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2002	1993/2002
Agricultural*	28	33	18	19	23	23	21	35	25	27	27	-4%
Other	727	811	552	681	837	1,097	1,122	1,635	1,670	1,450	1,450	99%
Total	755	844	570	700	860	1,120	1,143	1,670	1,695	1,477	1,477	96%

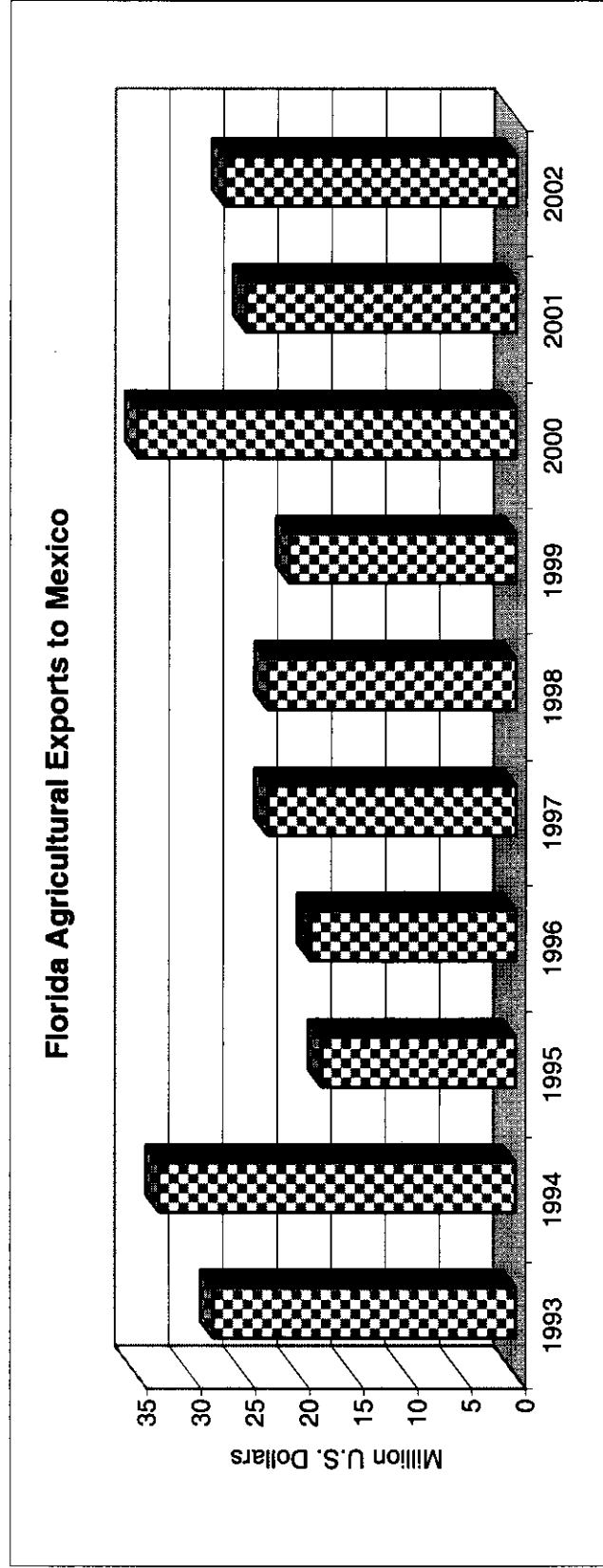
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(*) NAICS include 111 (Agricultural Products); 112 (Livestock & Livestock Products); & 311 (Food & Kindred products).

Source: USDOC.

Florida's agricultural exports to Mexico have decreased 4% under NAFTA, but other exports have grown 99%



Iowa Exports to Mexico

	(Million of U.S. Dollars)										% Growth
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	1993/2002
Agricultural*	83	128	135	172	157	144	145	130	194	189	128%
Other	67	98	82	96	131	176	200	216	178	207	209%
Total	150	226	217	268	288	320	345	346	372	396	164%

Agricultural*

Other

Total

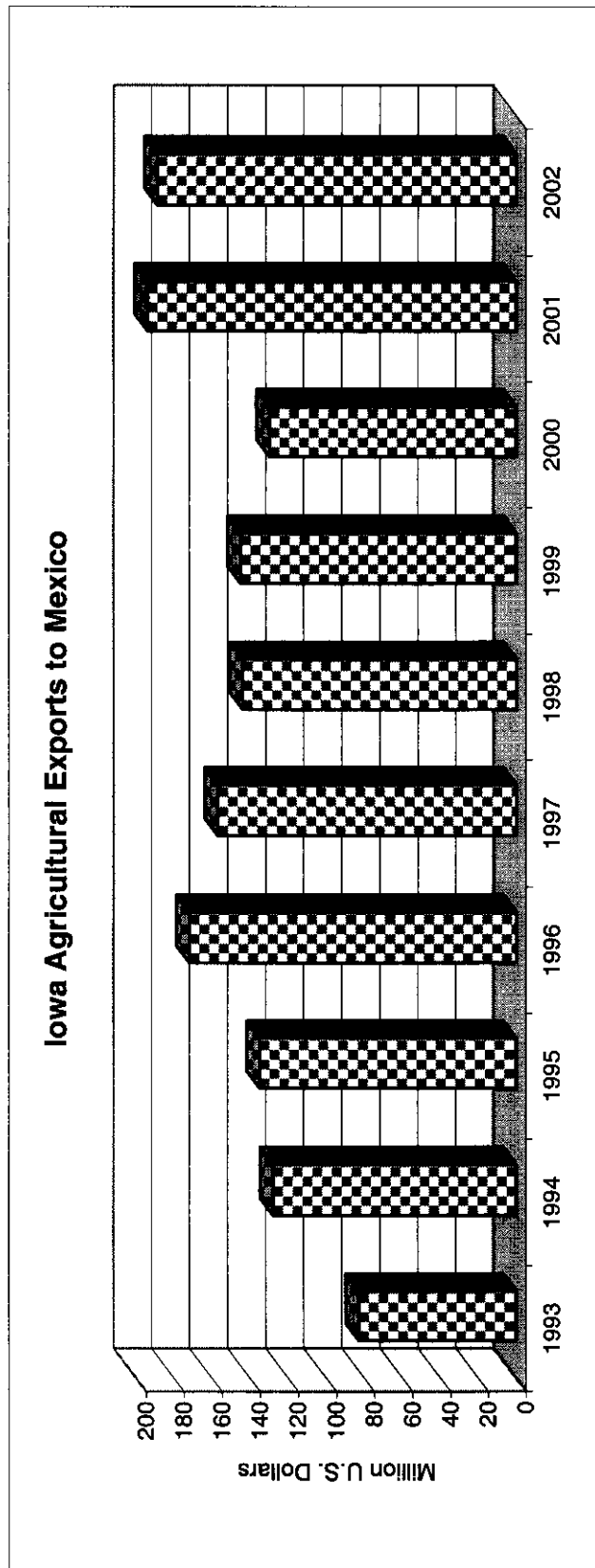
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Source: USDOC.

Iowa's agricultural exports to Mexico have increased 128% under NAFTA; while other exports have grown 209%



Kentucky Exports to Mexico

	(Million of U.S. Dollars)										% Growth 1993/2002
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	
Agricultural*	10	12	14	21	10	6	6	6	8	10	0%
Other	187	245	145	192	304	462	455	483	426	459	145%
Total	197	257	159	213	314	468	461	489	434	469	138%

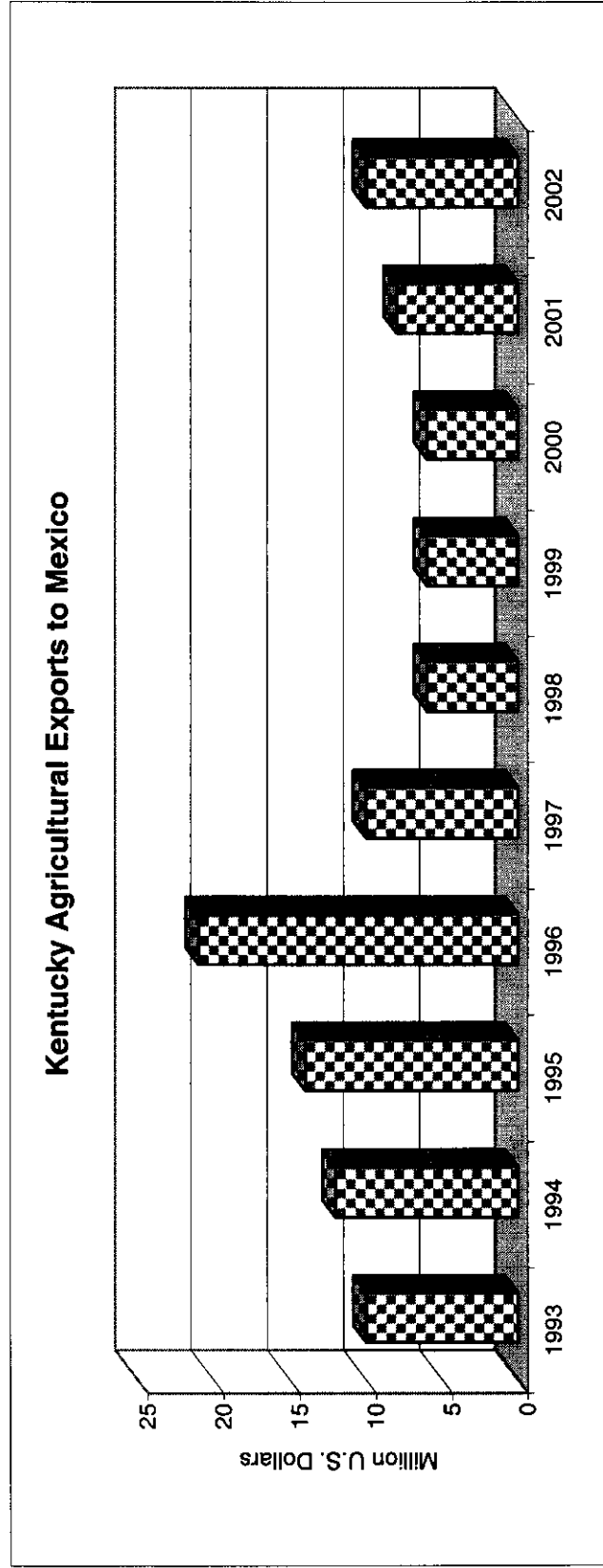
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Source: USDOC.

Kentucky's agricultural exports to Mexico have remained flat under NAFTA, while other exports have grown 146%



Louisiana Exports to Mexico

	(Million of U.S. Dollars)										% Growth
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	1993/2002
Agricultural*	229	458	377	903	490	771	750	756	807	1,036	352%
Other	272	295	287	255	413	415	560	882	717	596	119%
Total	501	753	664	1,158	903	1,186	1,310	1,638	1,524	1,632	226%

Agricultural*

Other

Total

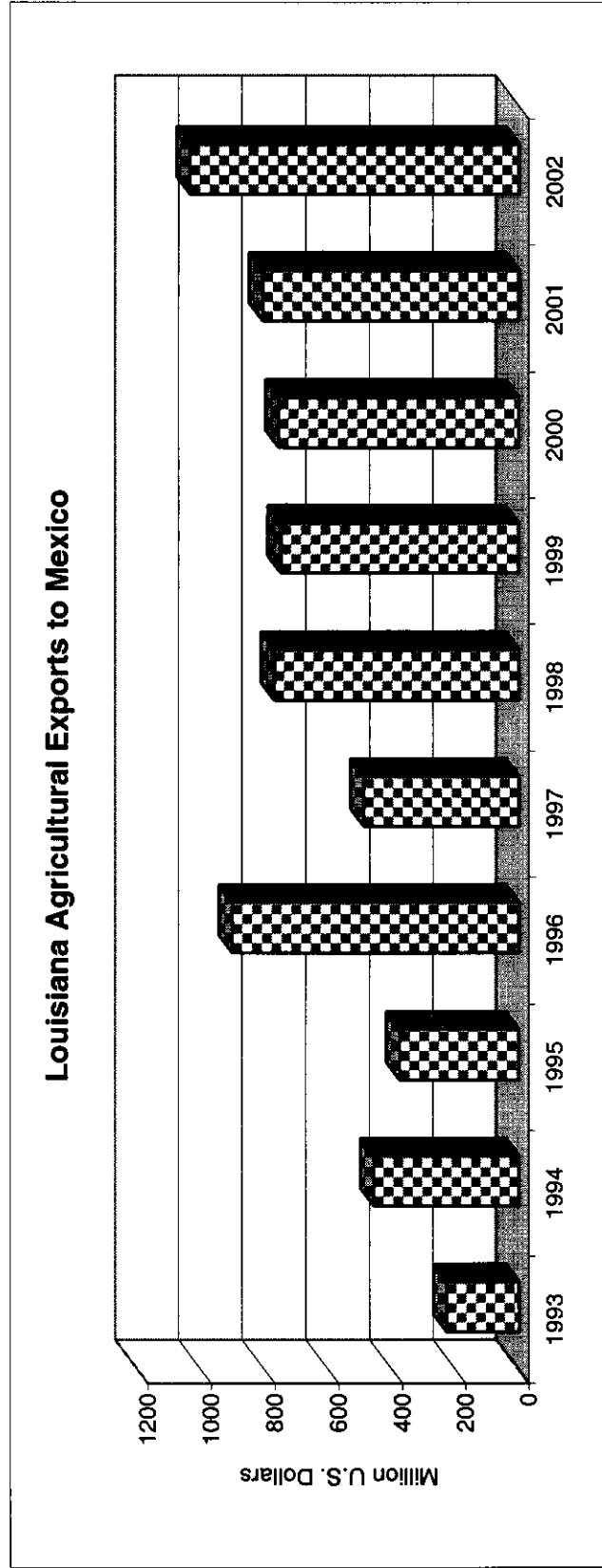
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Source: USDOC.

Louisiana's agricultural exports to Mexico have increased 352% under NAFTA, while other exports have grown 119%.



Maine Exports to Mexico

	(Million of U.S. Dollars)										% Growth
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	1993/2002
Agricultural*	2	3	2	1	0.4	0.3	1	3	1	2	0%
Other	17	25	12	18	22	22	57	34	33	27	59%
Total	19	28	14	19	22	22	58	37	34	29	53%

Agricultural*

Other

Total

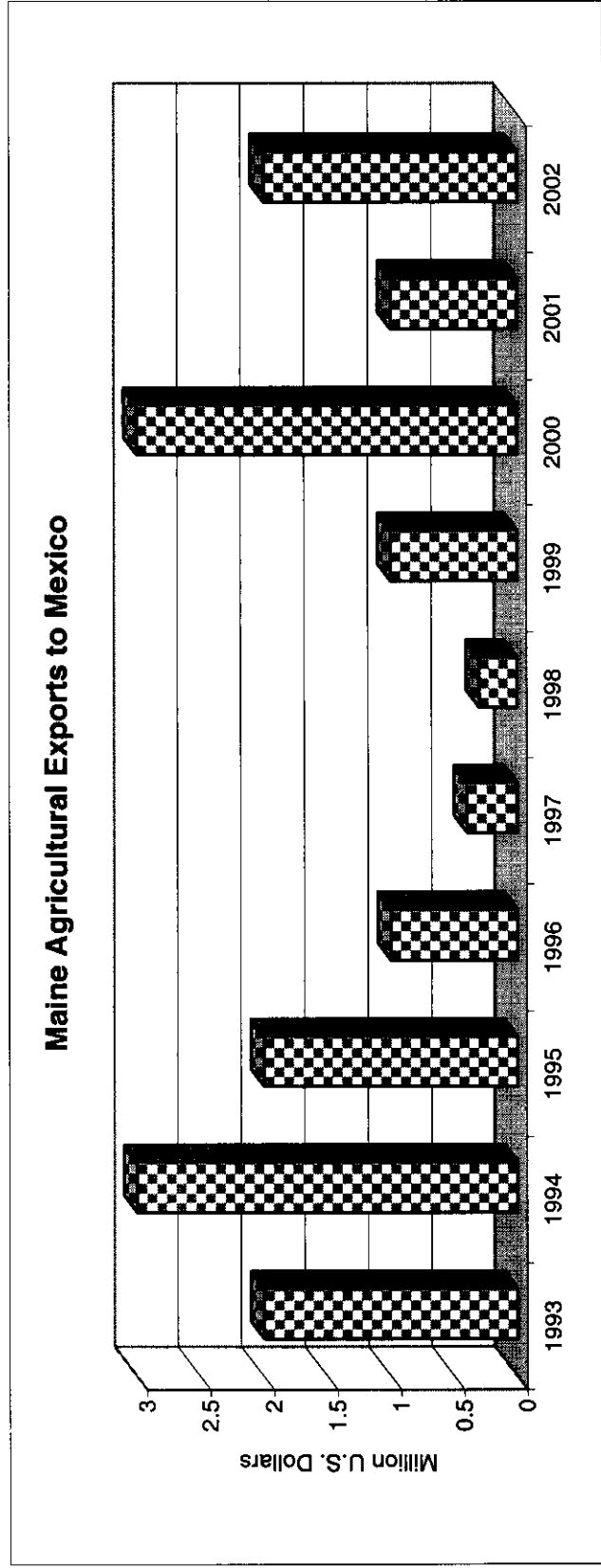
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(*) NAICS include 111 (Agricultural Products); 112 (Livestock & Livestock Products); & 311 (Food & Kindred products).

Source: USDOC.

Maine's agricultural exports to Mexico have remained flat under NAFTA, while other exports have grown 59%



Massachusetts Exports to Mexico

	(Million of U.S. Dollars)										% Growth
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	1993/2002
Agricultural*	13	10	6	7	11	10	5	4	7	11	-15%
Other	282	340	237	347	429	506	674	697	564	553	96%
Total	295	350	243	354	440	516	679	701	571	564	91%

Agricultural*

Other

Total

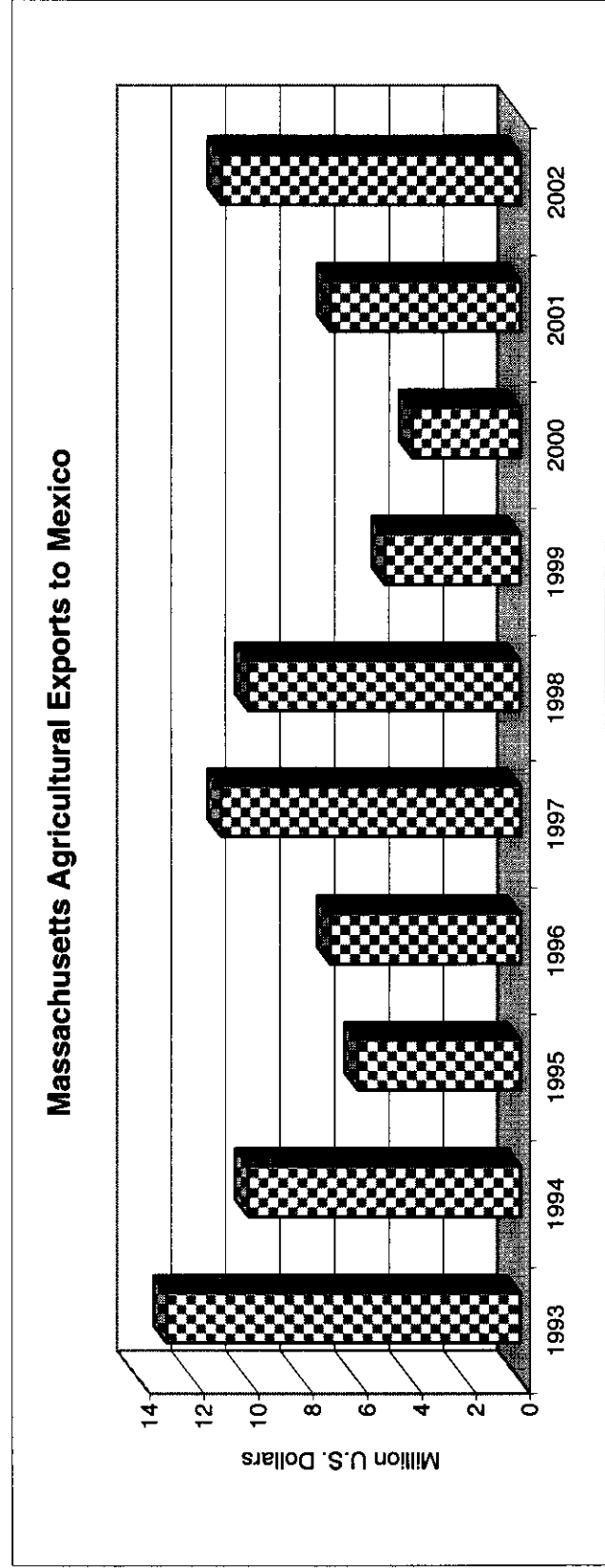
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Source: USDOC.

Massachusetts' agricultural exports to Mexico have decreased 15% under NAFTA, while other exports have grown 96%



Mississippi Exports to Mexico

	(Million of U.S. Dollars)										% Growth 1993/2002
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	
Agricultural*	5	9	9	11	22	87	58	63	66	28	460%
Other	85	124	182	157	103	214	308	348	387	434	411%
Total	90	133	191	168	125	301	366	411	453	462	413%

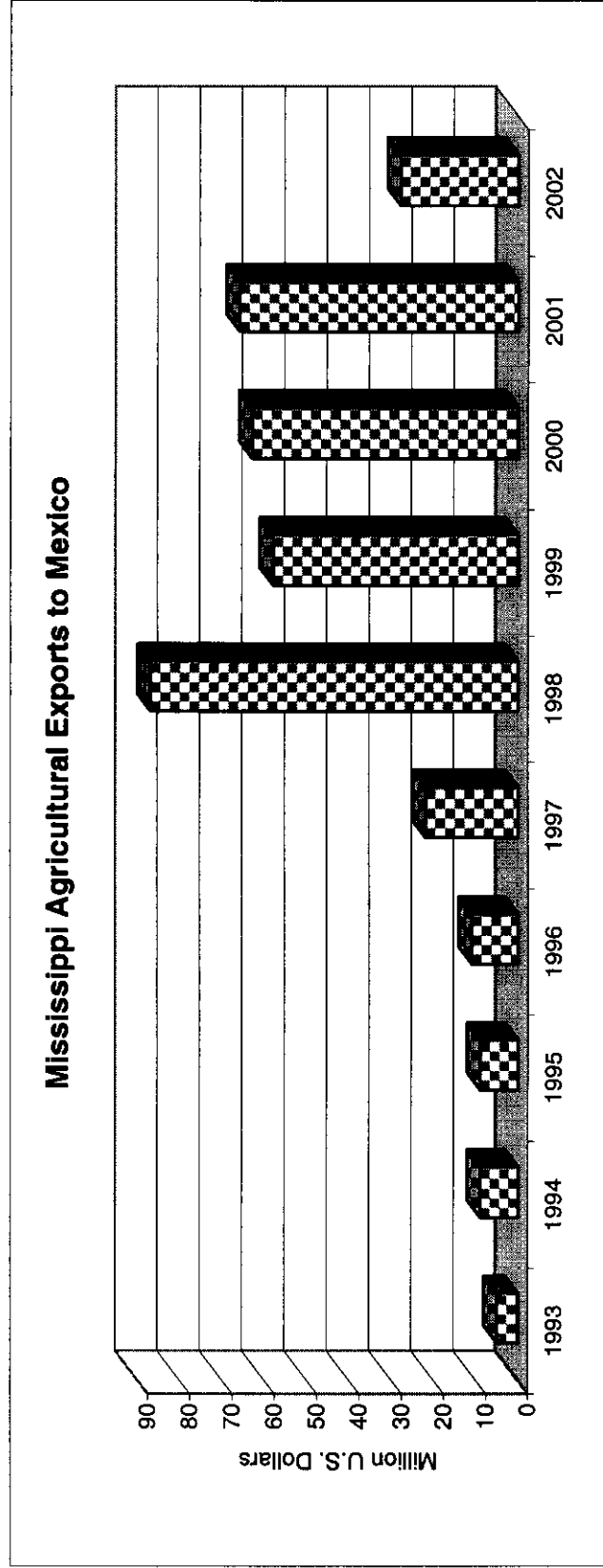
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(*) NAICS include 111 (Agricultural Products); 112 (Livestock & Livestock Products); & 311 (Food & Kindred products).

Source: USDOC.

Mississippi's agricultural exports to Mexico have increased 460% under NAFTA, while other exports have grown 411%



Montana Exports to Mexico

	(Million of U.S. Dollars)										% Growth
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	1993/2002
Agricultural*	2	5	6	6	2	1	0.4	5	14	9	350%
Other	11	12	17	37	19	45	78	68	20	6	-45%
Total	13	17	23	43	21	46	78	73	34	15	15%

Agricultural*

Other

Total

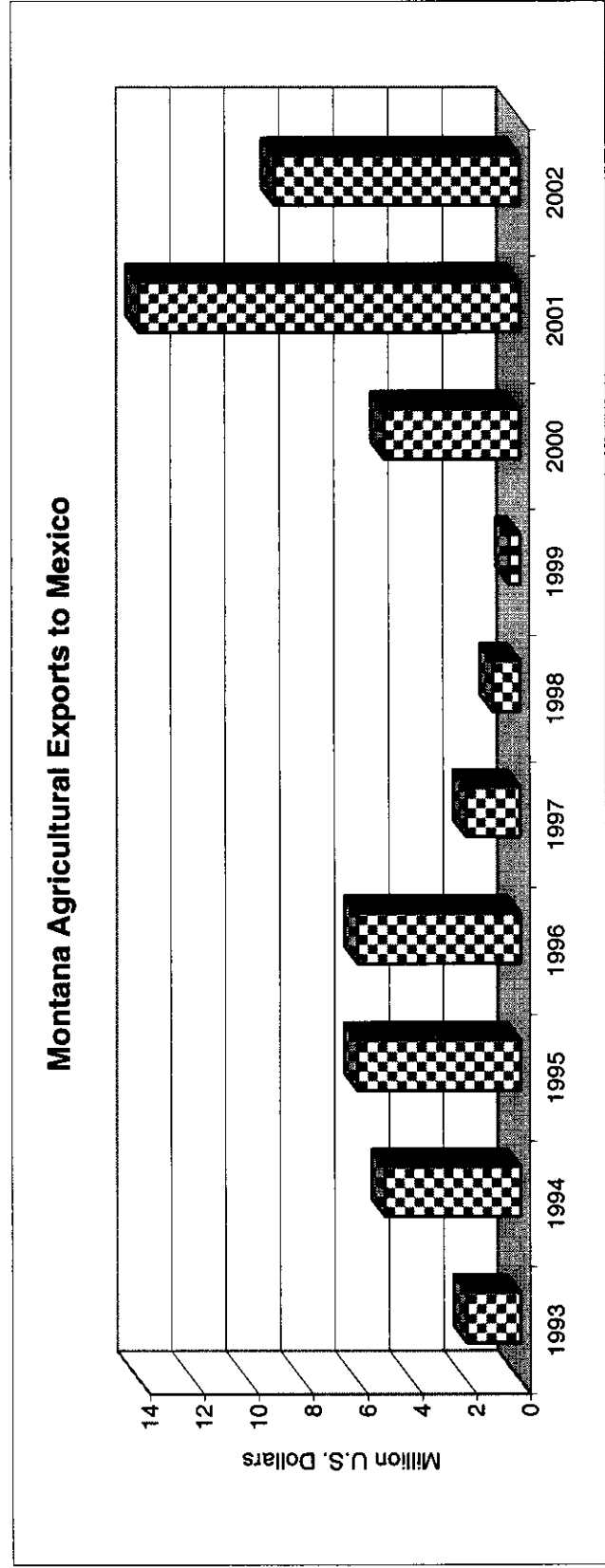
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Source: USDOC.

Montana's agricultural exports to Mexico have increased 350% under NAFTA



New Mexico Exports to Mexico

	(Million of U.S. Dollars)										% Growth
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	
Agricultural*	7	10	7	6	10	9	6	14	14	13	86%
Other	70	92	48	64	85	53	49	113	98	104	49%
Total	77	102	55	70	95	62	55	127	112	117	52%

Agricultural*

Other

Total

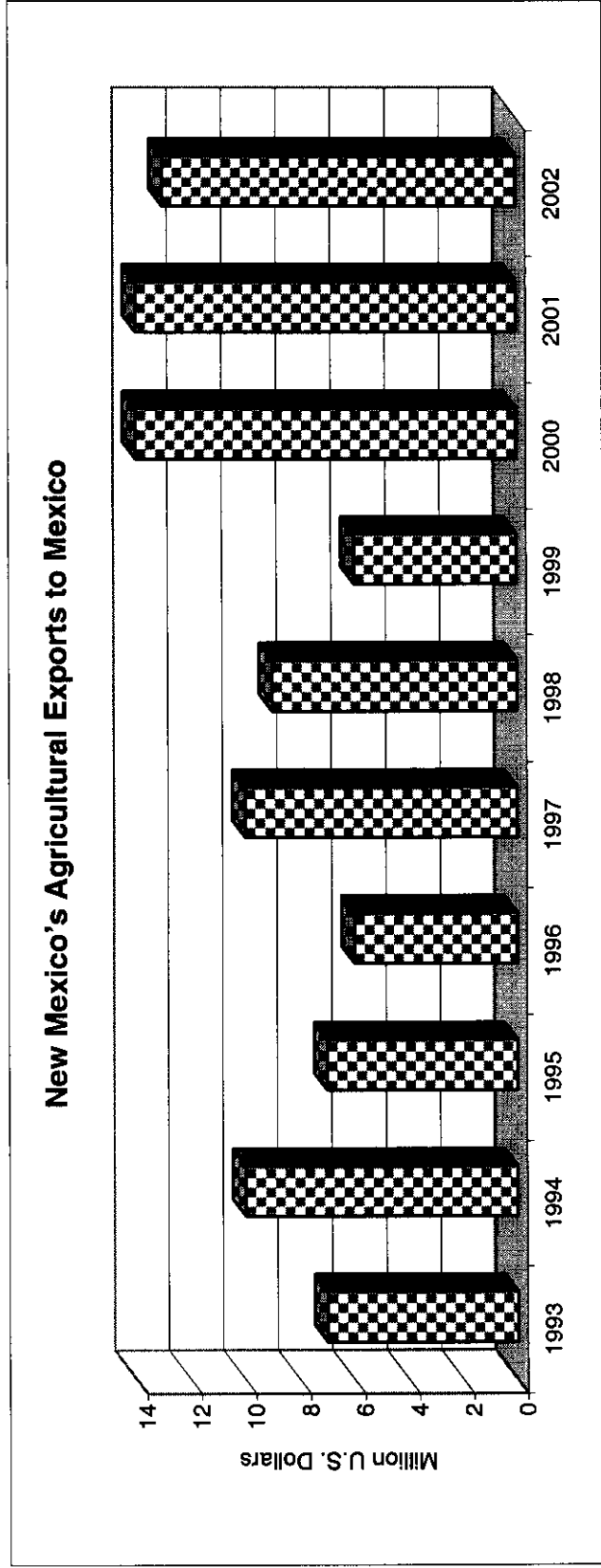
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(*) NAICS include 111 (Agricultural Products); 112 (Livestock & Livestock Products); & 311 (Food & Kindred products).

Source: USDOC.

New Mexico's agricultural exports to Mexico have increased 86% under NAFTA, while other exports have grown 49%



North Dakota Exports to Mexico

	(Million of U.S. Dollars)										% Growth
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	
Agricultural*	14	18	33	56	47	41	16	20	36	36	157%
Other	2	1	8	6	12	7	5	4	2	3	50%
Total	16	19	41	62	59	48	21	24	38	39	144%

Agricultural*

Other

Total

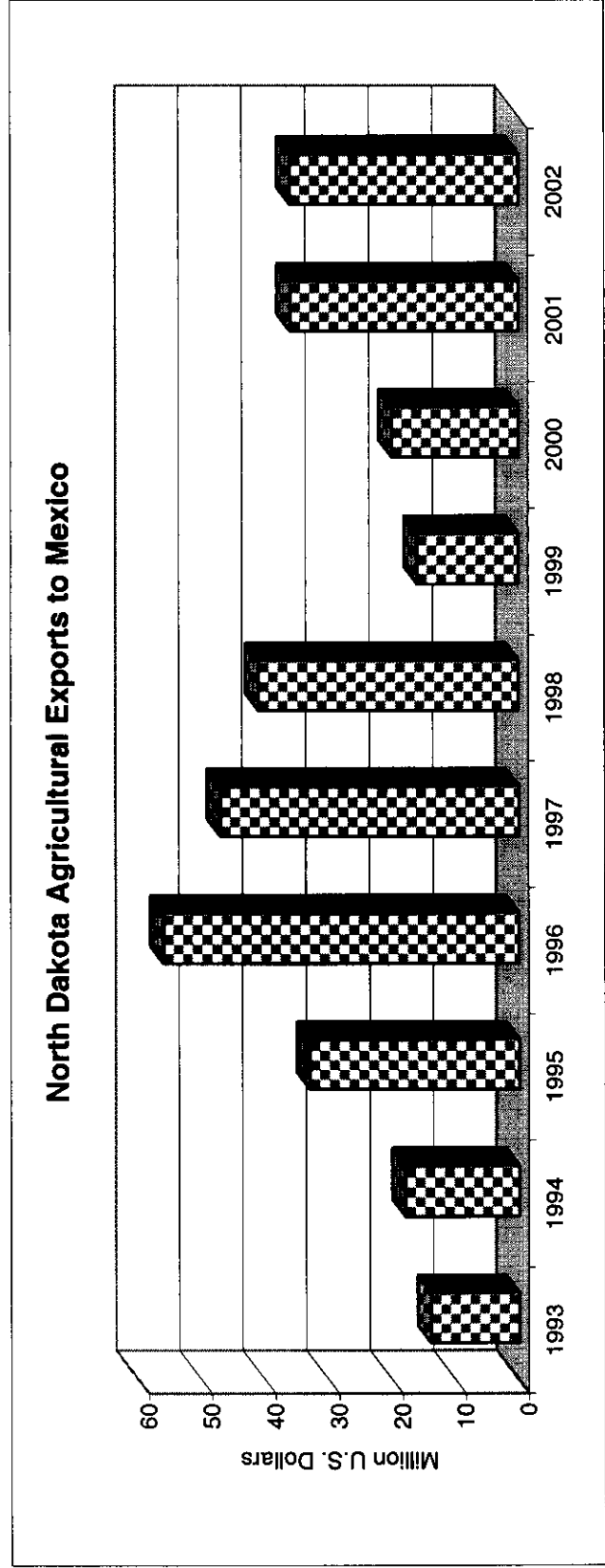
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Source: USDOC.

North Dakota's agricultural exports to Mexico have increased 157% under NAFTA, while other exports have grown 50%



Oklahoma Exports to Mexico

	(Million of U.S. Dollars)										% Growth
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	1993/2002
Agricultural*	33	22	15	5	14	19	23	31	48	33	0%
Other	144	200	132	180	173	276	237	196	148	167	16%
Total	177	222	147	185	187	295	260	227	196	200	13%

Agricultural*

Other

Total

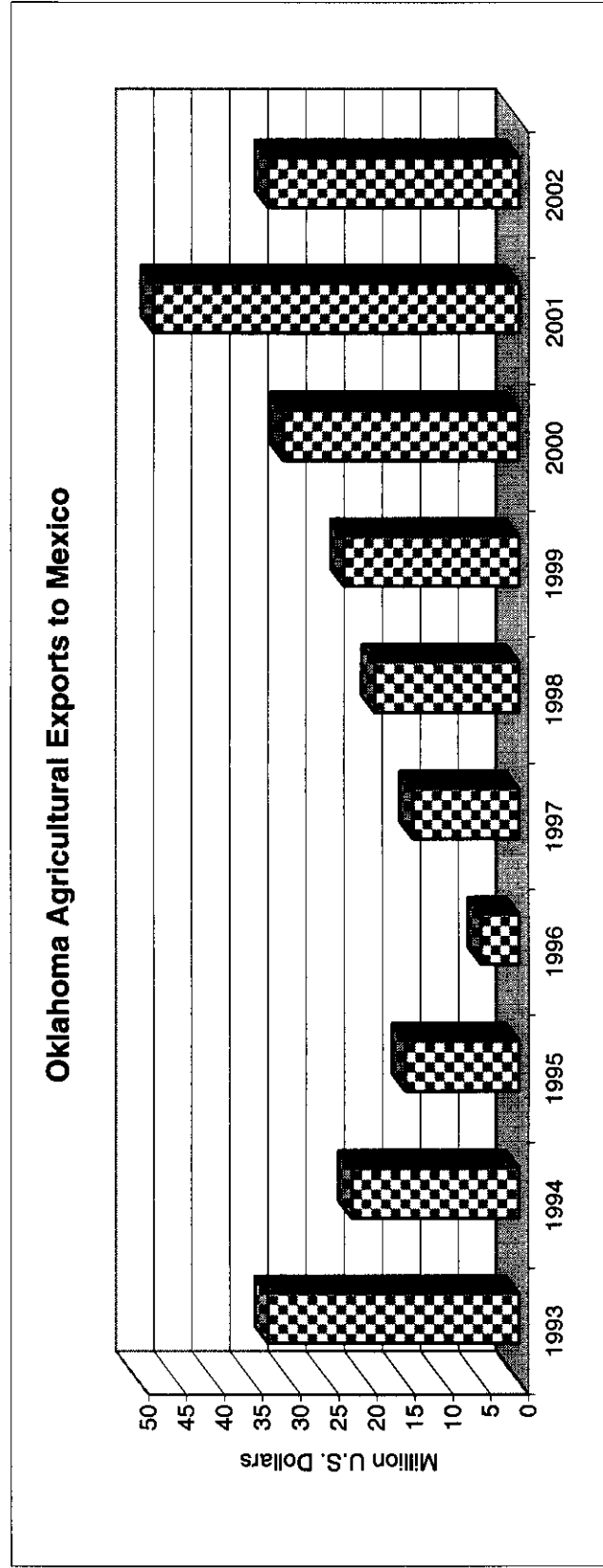
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Source: USDOC.

Oklahoma's agricultural exports to Mexico have remained flat under NAFTA, while other exports have grown 16%



Oregon Exports to Mexico

	(Million of U.S. Dollars)										% Growth
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	1993/2002
Agricultural*	9	6	3	5	8	5	7	6	7	5	-44%
Other	117	129	84	90	176	303	902	475	273	325	178%
Total	126	135	87	95	184	308	909	481	280	330	162%

Agricultural*

Other

Total

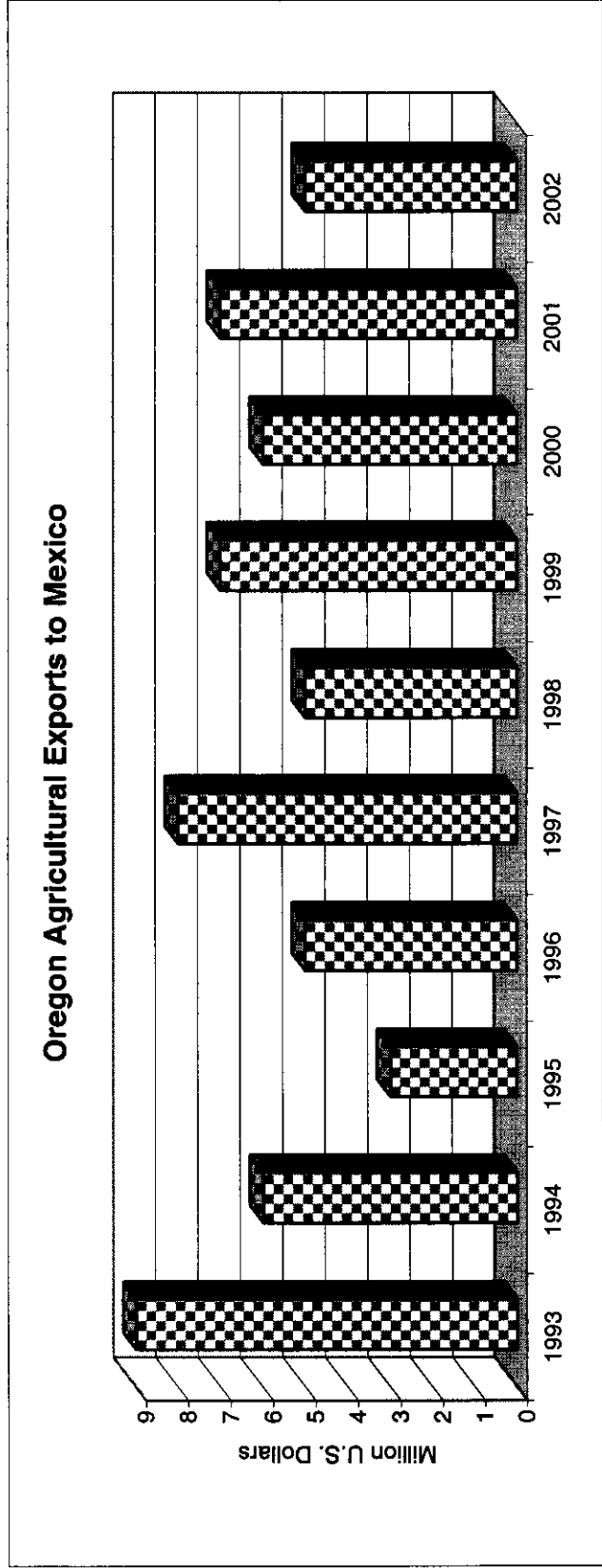
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Source: USDOC.

Oregon's agricultural exports to Mexico have decreased 44% under NAFTA, while other exports have grown 178%



Pennsylvania Exports to Mexico

	(Million of U.S. Dollars)										% Growth
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	1993/2002
Agricultural*	25	36	34	26	24	23	34	38	39	43	72%
Other	629	818	630	826	1,036	1,125	1,287	1,332	1,388	1,193	90%
Total	654	854	664	852	1,060	1,148	1,321	1,370	1,427	1,236	89%

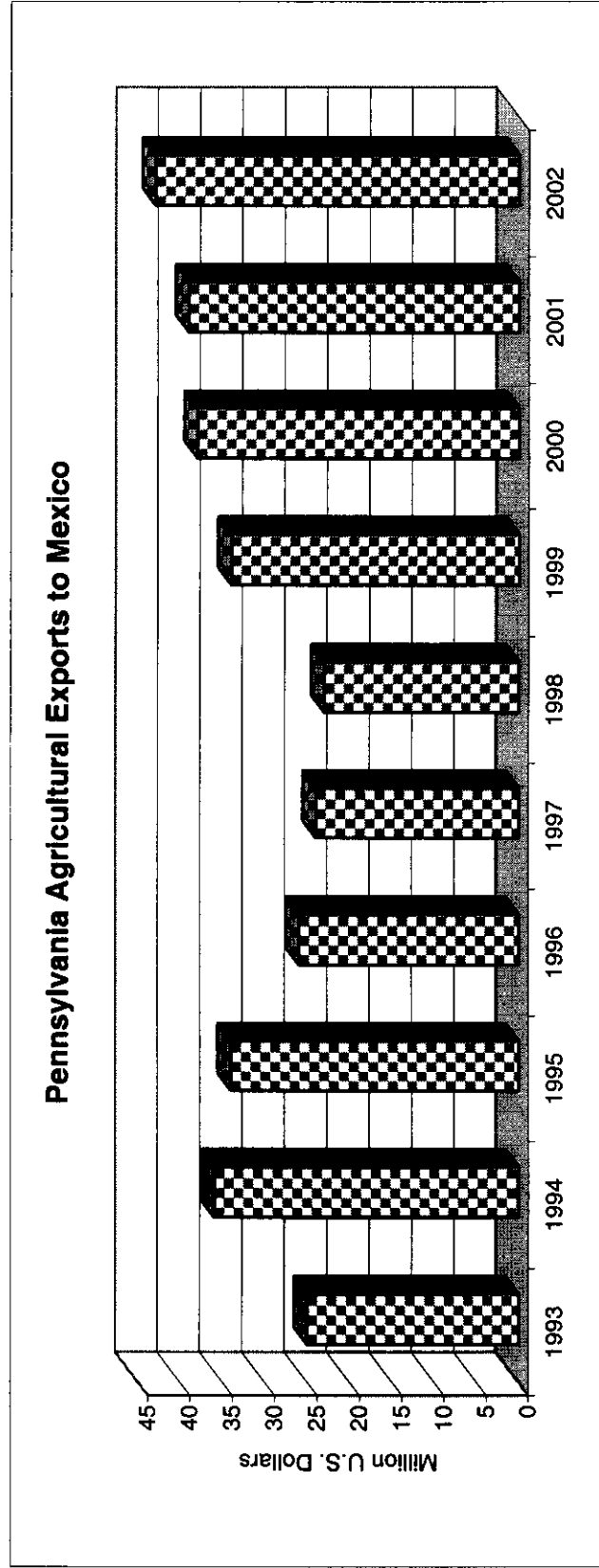
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Source: USDOC.

Pennsylvania's agricultural exports to Mexico have increased 72% under NAFTA, while other exports have grown 90%



South Dakota Exports to Mexico

	(Million of U.S. Dollars)										% Growth 1993/2002
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	
Agricultural*	1	3	3	2	21	40	72	59	46	59	5800%
Other	4	5	4	4	10	20	17	10	12	16	300%
Total	5	8	7	6	31	60	89	69	58	75	1400%

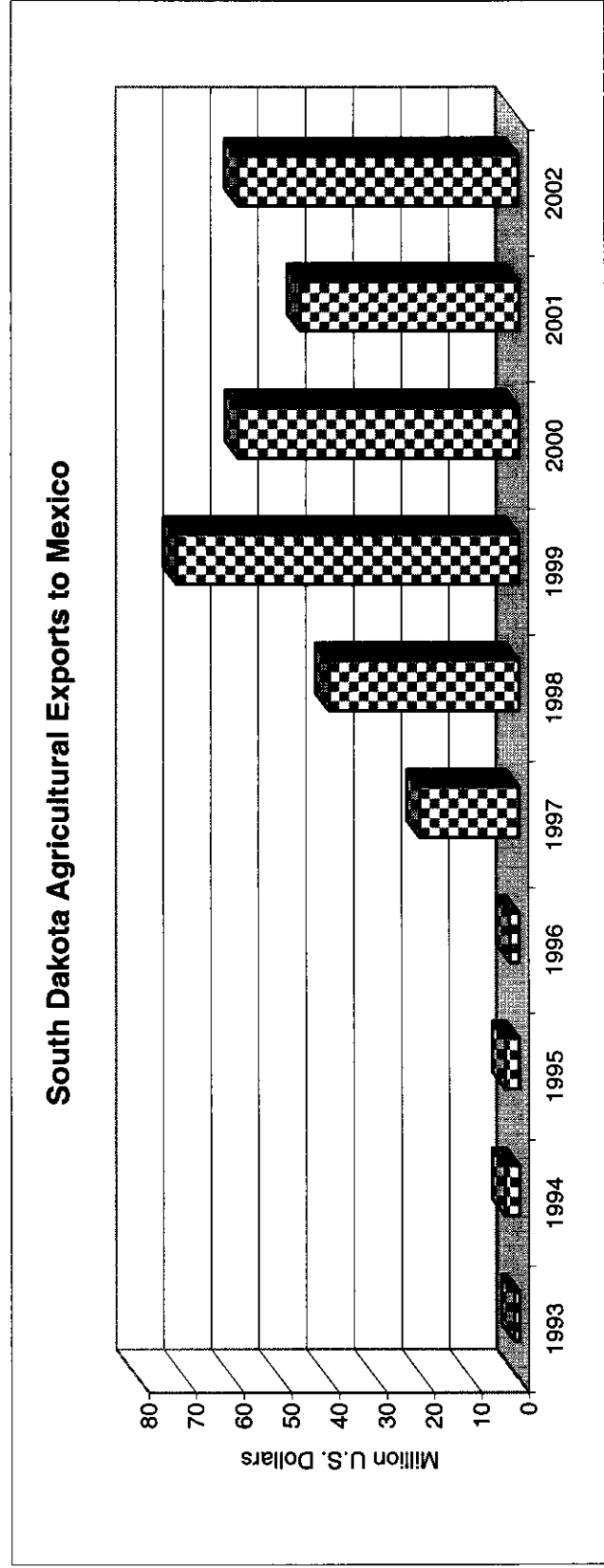
Notes: (*) Export figures 1993-1996 are SIC; 1997-2002 are NAICS classification.

(*) SIC include Agricultural Production-crops; Livestock & Livestock Product; Food & Kindred products.

(*) NAICS include 111 (Agricultural Products); 112 (Livestock & Livestock Products); & 311 (Food & Kindred products).

Source: USDOC.

South Dakota's agricultural exports to Mexico have grown 5008% under NAFTA, while other exports have grown 300%



Tennessee Exports to Mexico

	(Million of U.S. Dollars)										% Growth
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	1993/2002
Agricultural*	129	126	69	96	64	108	60	162	164	167	29%
Other	338	477	464	560	878	1,090	1,101	1,597	1,206	1,253	271%
Total	467	603	533	656	942	1,198	1,161	1,759	1,370	1,420	204%

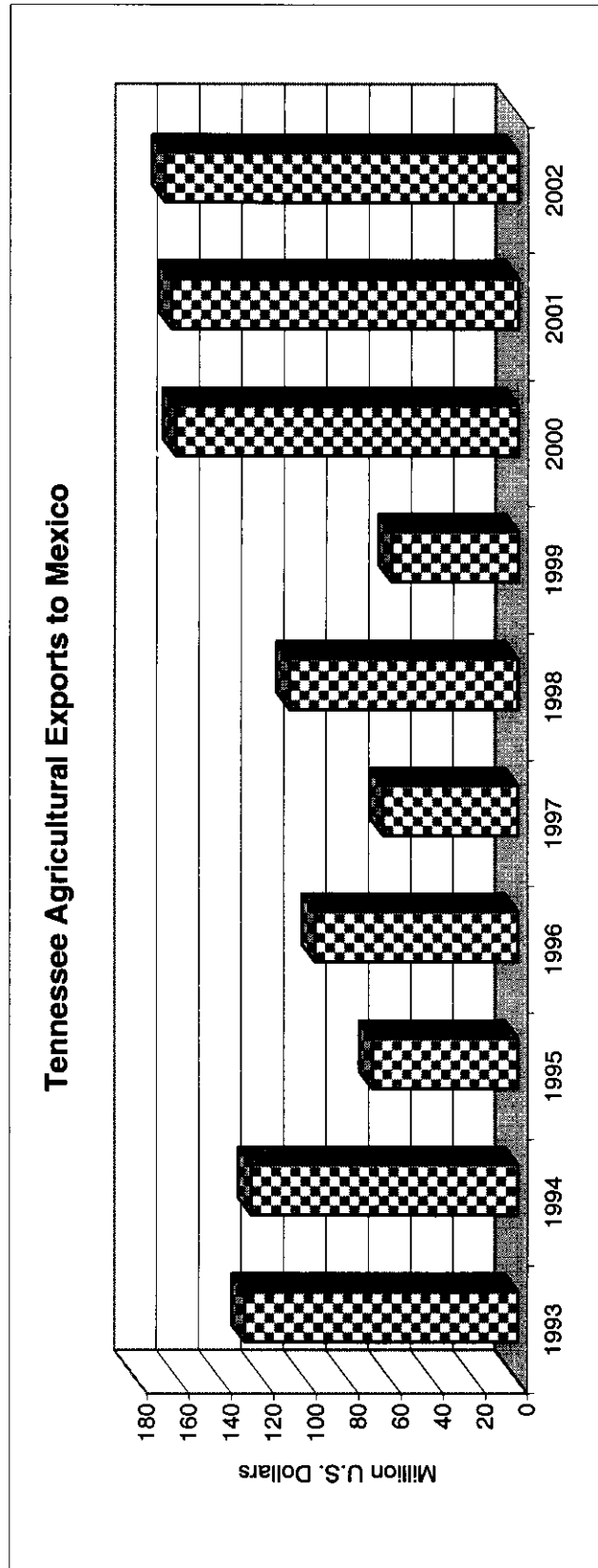
Notes: (*) Export figures 1993-1996 are SIC; 1997-2002 are NAICS classification.

(*) SIC include Agricultural Production-crops; Livestock & Livestock Product; Food & Kindred products.

(*) NAICS include 111 (Agricultural Products); 112 (Livestock & Livestock Products); & 311 (Food & Kindred products).

Source: USDOC.

Tennessee's agricultural exports to Mexico have increased 29% under NAFTA, while other exports have grown 271%



Utah Exports to Mexico

	(Million of U.S. Dollars)										% Growth 1993/2002
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	
Agricultural*	5	5	6	4	2	3	5	12	12	14	180%
Other	46	107	66	73	93	81	82	90	102	120	161%
Total	51	112	72	77	95	84	87	102	114	134	163%

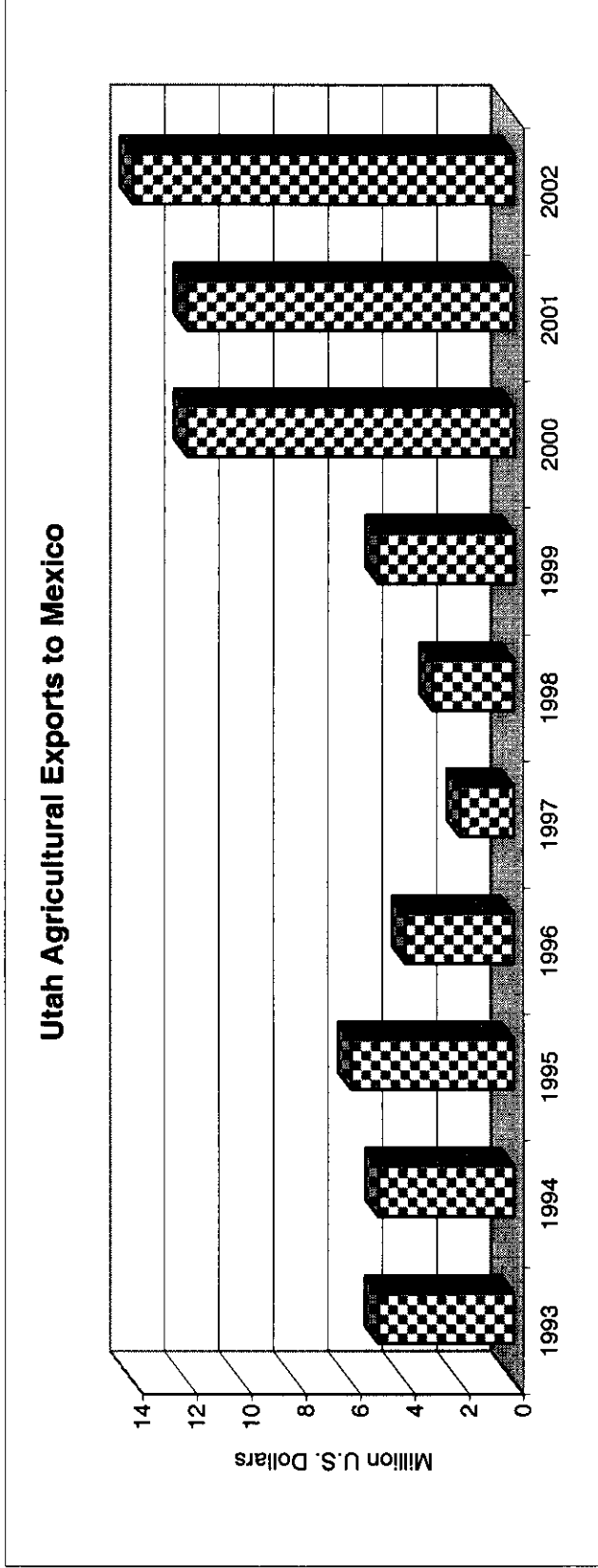
Notes: (*) Export figures 1993-1996 are SIC; 1997-2002 are NAICS classification.

(*) SIC include Agricultural Production-crops; Livestock & Livestock Product; Food & Kindred products.

(*) NAICS include 111 (Agricultural Products); 112 (Livestock & Livestock Products); & 311 (Food & Kindred products).

Source: USDOC.

Utah's agricultural exports to Mexico have increased 180% under NAFTA, while other exports have grown 161%



Vermont Exports to Mexico

	(Million of U.S. Dollars)										% Growth
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	1993/2002
Agricultural*	1	1	0.4	0.4	0.2	0.2	0.3	1	2	2	100%
Other	22	41	41	24	27	31	45	49	16	28	27%
Total	23	42	41	24	27	31	45	50	18	30	30%

Agricultural*

Other

Total

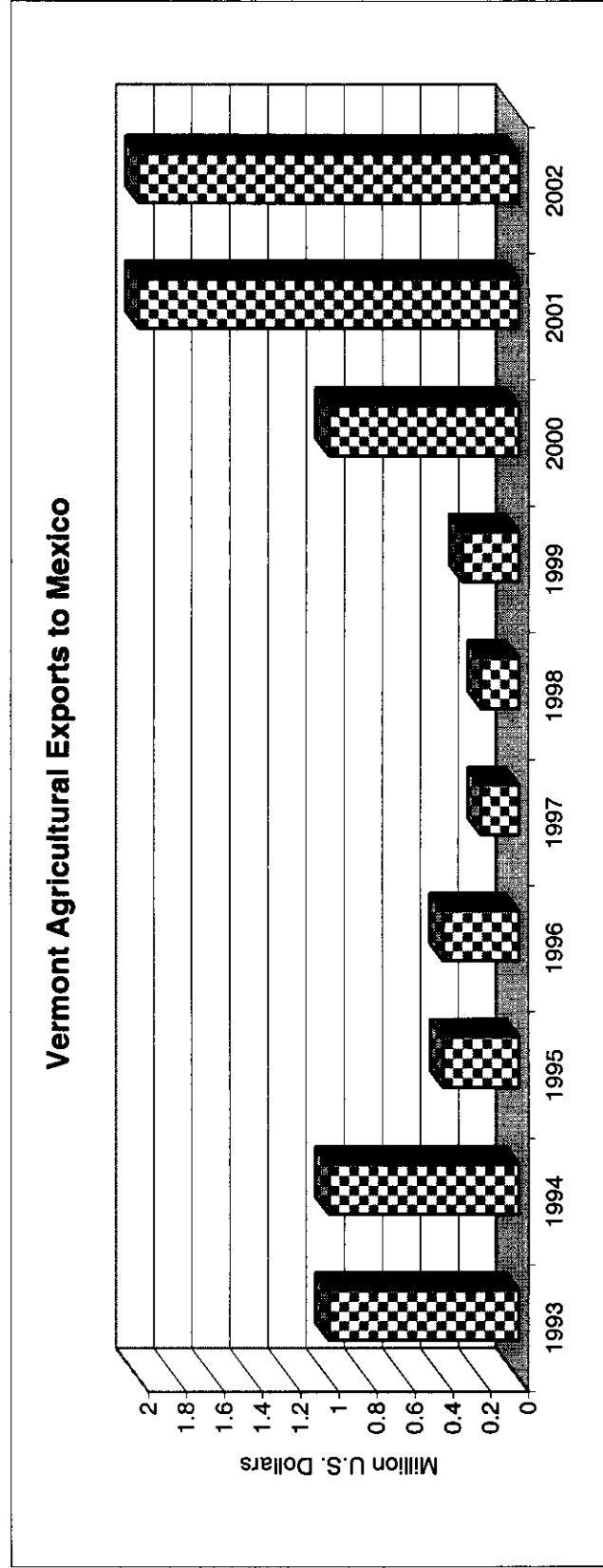
Notes: (*) Export figures 1993-1996 are SIC; 1997-2002 are NAICS classification.

(*) SIC include Agricultural Production-crops; Livestock & Livestock Product; Food & Kindred products.

(*) NAICS include 111 (Agricultural Products); 112 (Livestock & Livestock Products); & 311 (Food & Kindred products).

Source: USDOC.

Vermont's agricultural exports to Mexico have increased 100% under NAFTA, while other exports have grown 27%



West Virginia Exports to Mexico

	(Million of U.S. Dollars)										% Growth 1993/2002
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	
Agricultural*	0.0	0.0	0.0	0.1	0.3	1	0.0	0.0	0.0	0.3	0%
Other	37	24	28	28	40	51	35	29	44	76	105%
Total	37	24	28	28	40	52	35	29	44	76	105%

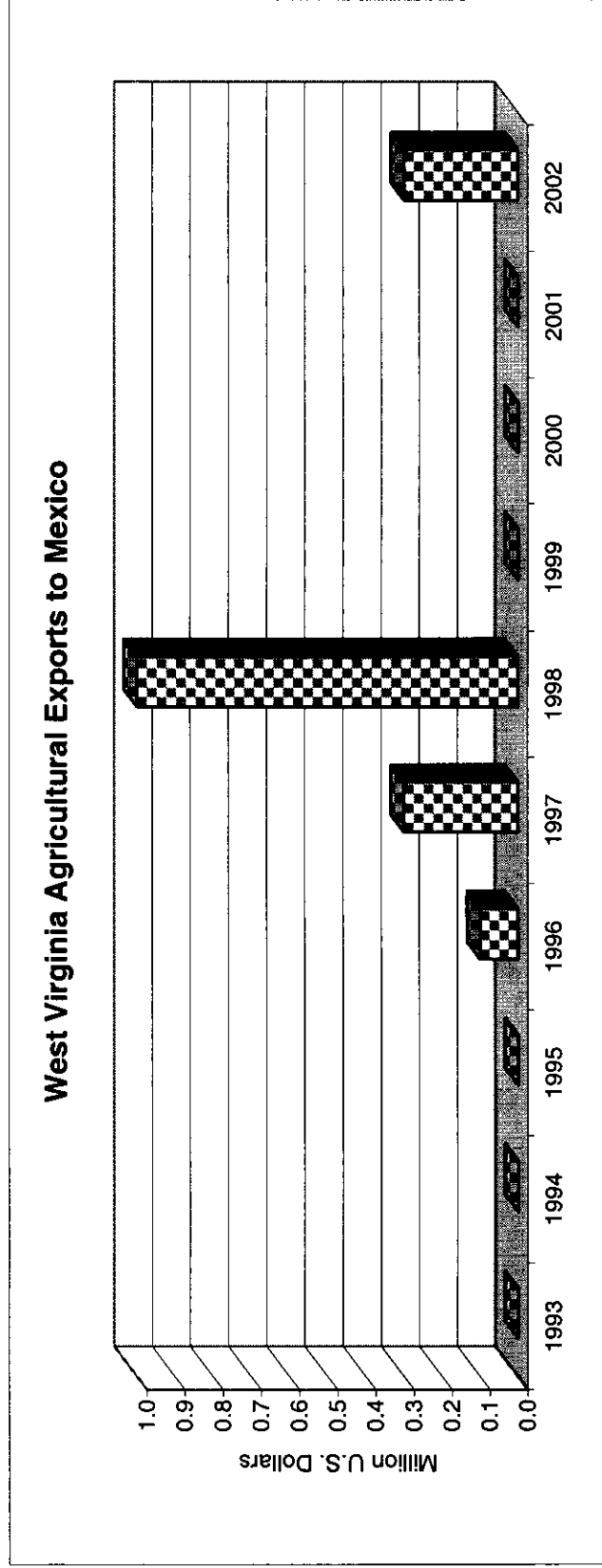
Notes: (*) Export figures 1993-1996 are SIC; 1997-2002 are NAICS classification.

(*) SIC include Agricultural Production-crops; Livestock & Livestock Product; Food & Kindred products.

(*) NAICS include 111 (Agricultural Products); 112 (Livestock & Livestock Products); & 311 (Food & Kindred products).

Source: USDOC.

West Virginia's agricultural exports to Mexico have always been nil; under NAFTA other exports have grown 105%



Wyoming Exports to Mexico

	(Million of U.S. Dollars)										% Growth
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	1993/2002
Agricultural*	1	0.4	0.0	0.4	0.0	1	1	0.3	0.4	1	0%
Other	7	8	8	18	61	58	61	54	52	56	700%
Total	8	8	8	18	61	59	62	54	52	57	613%

Notes: (*) Export figures 1993-1996 are SIC; 1997-2002 are NAICS classification.

(*) SIC include Agricultural Production-crops; Livestock & Livestock Product; Food & Kindred products.

(*) NAICS include 111 (Agricultural Products); 112 (Livestock & Livestock Products); & 311 (Food & Kindred products).

Source: USDOC.

Wyoming's agricultural exports to Mexico have remained flat under NAFTA, while other exports have grown 700%

