



# ANIMAL WELFARE GROUP COUNTRY PROFILE | MEXICO



## KEY METRICS

(All figures are approximate)



### POPULATION



33,919,000



8,834,000



8,775,000



314,000

Livestock production units



300,000

Cattle can be fed at the world's largest cattle production facility



80%

of pork production occurs at large-scale facilities

### BEEF CONSUMPTION



10.0  
kgs/capita  
(22 lbs/capita)



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## SUGGESTED DUE DILIGENCE RATING

### **Transport**

- There is some legislation regarding the transport of animals in Mexico, including rest, food, water and the hygiene of the vehicle.
- There is no evidence of specific regulations on the condition of the vehicles used to transport animals, suggesting that some animal welfare issues could occur during transport.
- The vast majority of Mexican cattle exports were transported to the USA, where animals receive good protection.

### **Traceability**

- Livestock are tagged with a unique barcode that can be used to trace the movement of animals. However, this system is voluntary and it is the responsibility of the owner to keep the information up to date, suggesting that it is not always strictly followed.
- Demand for improved traceability from the USA and other financial incentives have fuelled an increase in the number of animals that are tagged.
- The presence of legislation describing what branding might be acceptable suggests that this practice still occurs in Mexico.

### **Slaughter**

- The majority of slaughter occurs in federally inspected facilities. All exports must have been processed in one of these facilities.
- Legislation varies by state, but it is specified that all animals must be rendered unconscious prior to slaughter. There is further variation in the quality of animal welfare in the uninspected slaughterhouses, which supply Mexico's domestic market.

### **Legislation**

- The majority of legislation is passed at a state level, therefore resulting in significant variation in the quality of animal welfare regulations.
- The national government has some legislation regarding animal welfare; however, this is relatively basic and can be easily interpreted in a variety of ways.

### **Governance**

- There is evidence of corruption within Mexico.
- The extent to which animal welfare regulations are enforced is unclear.

### **NGO Activity**

- NGOs in Mexico focus on the practice of bullfighting, which has been banned at state level in some states but is permitted at a federal level due to its cultural significance.
- Some NGOs have brought to attention Mexico's slaughter of horses, which are sometimes argued to be a companion species.



## FARMING

Farming is a significant industry in Mexico. Agricultural land cover accounts for 55% of Mexico's total land area<sup>1</sup> and the industry employed 13.7% of the workforce in 2014<sup>2</sup>. Mexico is one of the 20 largest food exporters in terms of monetary value, something to which livestock heavily contributes<sup>2</sup>.

In 2018 Mexico's cattle inventory ranked 9th largest globally<sup>3</sup>. The country is the 6th largest beef producer worldwide and the 2nd largest producer in Latin America behind Brazil<sup>3</sup>. In 2018 Mexico produced 1.96 million tonnes of beef products<sup>4</sup>, sourced from roughly 6,100,000 slaughtered cattle<sup>5</sup>. Mexico is promoting the import of live cattle, both dairy and beef, for the purpose of increasing herd sizes and improving genetics<sup>5</sup>. The USA is Mexico's dominant trading partner, and this is also true for livestock including cattle. Between January and June 2018, 98% of cattle imported to Mexico originated from the USA<sup>4</sup>, while 99.98% of cattle exported from Mexico were relocated to the USA<sup>4</sup>. There are ongoing efforts by the Mexican authorities to diversify their trading partners, and the country is working with countries in Asia, the Middle East, and European Union (EU) increasingly<sup>4</sup>.

In 2007 there were an estimated 314,000 livestock production units in Mexico<sup>6</sup>. A variety of production methods are used in Mexico's cattle industry, ranging from small-scale ranchers who raise calves on grass and pasture<sup>6</sup>, to large, industrialised producers. The world's largest cattle production facility is located in the state of Durango<sup>7</sup>. Opened in 2016, it has the capacity to feed over 300,000 cattle at any one time and covers an area of 474 hectares<sup>7</sup>. A significant proportion of calves, particularly those destined for export<sup>8</sup>, are reared in southern and central states before moving further north for fattening and finishing<sup>4</sup>. The three largest beef producing states are Veracruz, Jalisco and Chiapas, and in 2015, they accounted for 13.8%, 11.8% and 5.8% of total beef production in Mexico respectively<sup>8</sup>.

Historically there were a large number of small-scale cattle ranchers many of whom operated on Hacienda estates built in the 19th century<sup>6</sup>. Current figures are difficult to source, however greater competition from international imports, fluctuations in the cost of feed and unfavourable environmental conditions (e.g. drought) have led to a reduction in their numbers<sup>4,6</sup>. In recent times small-scale farming has become more common in the south of Mexico, and these practices are associated with lower productivity, higher levels of poverty and more in situ slaughter methods<sup>9</sup>. Conversely, modern, technologically advanced facilities are more concentrated in the north of the country and it is these producers that typically serve global markets<sup>9</sup>.

A change in federal government took place on December 1st 2018<sup>4</sup>. The administration pledged to ensure that Mexico is self-sufficient in terms of pork and beef by 2022 meaning that changes in the country's approach to livestock are expected<sup>4</sup>. The cost of beef is high in Mexico and although its consumption is becoming more popular, pork and poultry remain as the most common sources of meat, particularly for the working and lower-middle classes<sup>4</sup>.

Pig farming has undergone significant growth and in 2019 it is estimated that Mexico's pig population will reach 18,950,000<sup>4</sup>. This figure far exceeds that of 2016 and has been driven by rapid vertical integration of pork producers, and the implementation of more industrial-scale farming practices in order to exploit large domestic and international demand<sup>4</sup>. 80% of pork production occurs at large-scale facilities, and 23.4% of pork is produced in Jalisco<sup>4</sup>, with Sonora and Puebla also producing significant quantities<sup>8</sup>. Asian countries such as Japan are significant external markets, as is the EU increasingly. Mexico is working closely with Denmark in order to receive guidance on how to implement the most efficient production methods<sup>4</sup>. Infrastructural investment has been significant, particularly from large producers, however investment in small/medium-sized producers is more limited<sup>4</sup>.

Horse farming is an accepted practice in Mexico, and in 2016 over 596,000 horses were slaughtered for their meat<sup>10</sup>. The industry has received heightened levels of scrutiny in recent years, caused by the EU's ban on the import of Mexican horsemeat in 2014 following it being found in products labelled as containing beef<sup>11</sup>.



## TRANSPORT

It is estimated that 1.1 million of Mexico's 1.2 million live cattle exports entered the USA in 2018<sup>4</sup>. Between January and May 2018, 83% of live cattle exports were calves destined for further fattening and 17% were heifers destined for slaughter<sup>4</sup>. The dominance of the USA to Mexico's imports and exports of cattle in part relates to the relative cheapness and ease with which transport can occur<sup>4</sup>.

Domestically, it is commonplace for calves to be transported from southern and central states to more northern states for fattening and finishing<sup>4</sup>. Due to the significance of the USA to the import and export of live animals, northern states such as Chihuahua and Tamaulipas are heavily involved in the transport process<sup>12</sup>.

Legislation regarding the transport of animals varies between states<sup>13</sup>, however federal legislation exists that stipulates that transport conditions must be secure and hygienic, and that animals must be provided with adequate rest, food, water and be free from abuse<sup>14</sup>.

There is no evidence that the vehicles involved in the transport of animals are subject to any specific restrictions. Given that both domestic and international transport is common in the rearing of Mexican livestock, and due to the absence of regulated vehicles, it can be inferred that poor animal welfare practices are likely to occur during the transport process.

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## TRACEABILITY

In 2003 the National System of Individual Identification of Livestock (known as SINIIGA in Mexico) was introduced in an attempt to better manage animal health issues<sup>5,15</sup>. A voluntary programme, it is operated by an agency of the federal Department of Agriculture (known as SAGARPA) with the aim to ensure that all animals can be traced from origin to site of slaughter or processing<sup>15</sup>. At birth animals are provided with a tag containing a unique barcode<sup>15</sup>. The tag stores information about the animal, its origins and history, and this information is then stored in a central database<sup>15</sup>. Tags are transferred with the animal, and it is the owner's responsibility to update the information when necessary<sup>15</sup>.

Recent figures regarding SINIIGA participation are not readily available, however in 2006 33% of Mexican cattle had been tagged<sup>15</sup>. Participation has continued to grow since 2006, partly due to trading partners such as the USA making it a legal requirement that any Mexican bovine imports are issued with a tag that has been authorised by SAGARPA<sup>5</sup>. However, those animals which have not been tagged are typically destined for the domestic market<sup>12</sup> and continue to represent a significant proportion of Mexican cattle.

Participation is not obligatory, however those that do receive additional benefits from the state and are better able to export internationally<sup>5</sup>. As of 2018 the project continues to be rolled out, blocked in part by logistical and security issues in some states<sup>5</sup>. Additional issues centre on tags which are not, or incorrectly, filled in, something which reduces the effectiveness of the central database<sup>15</sup>. As a result of these issues, it can be concluded that the effectiveness of SINIIGA as a traceability system is yet to be fully achieved.

There is evidence that hot branding occurs in Mexico. In April 2018, the United States Department of Agriculture established new requirements for animal branding, stipulating that breeding cattle should be branded on the shoulder and feeder cattle on the hip<sup>16</sup>. The presence of such legislation indicates that hot branding is an animal welfare concern in Mexico.







## HIDES, SKIN & LEATHER

In 2016, the export of products related to animal hides totalled US\$591 million<sup>23</sup>. Of this, US\$238.4 million was tanned equine and bovine hides (1.5% of total global output)<sup>24</sup>. The 2nd most profitable subsector was the export of trunks and cases (US\$ 147.75 million), followed by saddlery (US\$ 55.55 million)<sup>23,24</sup>. Table 1 shows the key export destinations for tanned equine and bovine hides, trunks and cases, and saddlery.

**Table 1. Showing the key destinations of Mexican leather products<sup>23,24</sup>**

PRODUCT AND RANKING	EXPORT PARTNER (share)
Tanned Equine and bovine hides: 1st	USA (44%)
Tanned equine and bovine hides: 2nd	China (12%)
Tanned equine and bovine hides: 3rd	Austria (6.8%)
Trunks and cases: 1st	USA (75%)
Trunks and cases: 2nd	Canada (10%)
Trunks and cases: 3rd	Australia (1.6%)
Saddlery: 1st	USA (98%)
Saddlery: 2nd	Canada (0.67%)
Saddlery: 3rd	Australia (0.43%)

In 2014, Mexico produced 579 million ft<sup>2</sup> of bovine leather and 18.6 million ft<sup>2</sup> ovine and caprine leather<sup>27</sup>. These quantities ranked 3rd largest in Latin America, behind Brazil and Argentina<sup>27</sup>.

Mexico is not self-sufficient in animal hides, meaning that the leather products it produces may originate from animals raised elsewhere. In 2016, 29% of Mexico's imported tanned equine and bovine hides originated from the USA, 25% from Brazil and 11% from Argentina<sup>23,24</sup>. For raw hides, 85% originated from the USA, 3.7% from Colombia and 3.2% from Guatemala<sup>23,24</sup>.

Mexico's leather industry is centred in the city of Leon in the state of Guanajuato<sup>25</sup>. Leather manufacturing is well-established in Leon, and all 12 of Mexico's Leather Working Group approved tanneries are located in the city<sup>26</sup>.



## SLAUGHTERING

A growing proportion of Mexican livestock is slaughtered in facilities that have been federally inspected (known as TIF facilities)<sup>4,5,17,18</sup>. TIF facilities receive accreditation from Mexico's National Service of Health, Food Safety and Food Quality (SENASICA) once they have proven their adherence to international standards set by the World Organisation for Animal Health (OIE) and the UN affiliated Food and Agriculture Organisation<sup>17</sup>. International exports are restricted to TIF sites only<sup>17</sup>.

There are fewer TIF facilities than non-TIF facilities, however their capacity is more extensive<sup>18</sup>. In 2013, TIF facilities handled 51% of livestock slaughter in Mexico, a figure which has continued to rise<sup>18</sup>.

Facilities which are not TIF approved tend to serve Mexico's domestic market and are less rigorously inspected<sup>18</sup>. Small-hold cattle farmers adopt the fewest standardised slaughter methods and have garnered some negative attention for animal mistreatment in the past<sup>19</sup>, notably from animal welfare groups who have argued against the use of non-standardised slaughter methods that occur more frequently at facilities of this nature.

Legislation regarding approved slaughter practices is a matter of state level governance meaning that there is variation between states<sup>13</sup>, particularly in those sites which are not TIF approved. The Federal Animal Health Act (2007) is a piece of national legislation which stipulates that animals should be rendered unconscious before slaughter, and that animals which are not destined for human consumption cannot be slaughtered unless veterinary guidance has been sought<sup>14</sup>. However due to the variation in legislation, poor animal welfare slaughter practice can be found, particularly outside of TIF registered sites.

Halal slaughter is becoming more common in Mexico because of the growing importance of countries in the Middle East as trading partners<sup>20</sup>. In 2018 there were 15 plants certified to undertake halal slaughter in Mexico, a figure which is expected to increase as the country continues to diversify its exports<sup>20</sup>.

Bullfighting is a well-established part of Mexican culture. There are approximately 225 bullrings in the country, and the activity usually ends with the animal's death<sup>21</sup>. The Fiesta de la Virgen de la Candelaria is an annual event held in the town of Tlacotalpan (Veracruz, Central Mexico) in which bulls are ceremonially slaughtered using unconventional methods<sup>22</sup>.



## LEGISLATION & REGULATION

Mexico is comprised of 31 states and the federal district of Mexico City. Each has its own constitution, laws and regulations, and the governance of animal welfare is largely devolved to state level. As a result, the extent to which matters of animal welfare are legislated varies by location, and federal law which relates to Mexico in its entirety is not always compatible with that passed by the state<sup>13</sup>.

The federal Animal Health Act (2007) was introduced by the Ministry of Health as a means of supporting the eradication of disease, however it also covers matters of animal welfare and husbandry (e.g. agriculture, transport and slaughter)<sup>14</sup>. Specifically, Article 20 notes that animals are to be provided with sufficient food and water and are to be cared for in a way that avoids animals from experiencing feelings of fear, anguish and discomfort, and prevents the infliction of pain and injury<sup>14</sup>.

As with the Animal Health Act (2007), the Animal Health Law (2012) was introduced primarily for the purpose of protecting Mexico's livestock assets<sup>29</sup>, however in doing so also covers issues relevant to animal welfare. The matters covered in Article 20 of the Animal Health Act (2007) are repeated<sup>30</sup>, however it also stipulates that those involved in the farming of livestock need to assess risk factors and implement suitable mitigation strategies<sup>30</sup>.

State governments remain the key actors in matters of animal welfare and their engagement in such issues is variable. Most states have passed legislation that recognises animal sentience to some extent, however measures to outlaw animal suffering have not been fully adopted<sup>13</sup>. For example, the states of Chihuahua, Jalisco, Quintana Roo and Michoacan have passed relatively detailed state legislation, while others (e.g. Chiapas and Baja California Sur) do not legislate against animal suffering<sup>13</sup>. Jalisco and Veracruz are significant states in the Mexican livestock industry, and both have passed additional pieces of legislation regarding the protection of animals<sup>13</sup>. The variation in legislation represents an animal welfare risk due to the potential for legal loopholes to be exploited.





## GOVERNANCE

The Animal Health Act (2007) seeks to establish a set of general principles from which state governments can develop and implement specific pieces of secondary legislation. Many states have failed to completely legislate for the Animal Health Act's recommendations, and as a result, many of the topics it covers continue to occur in many parts of the country<sup>13</sup>.

Infringements of the Animal Health Act and Animal Health Law are typically classed as administrative offences for which punishments can take the form of suspended licenses, closures of premises or potentially meaningful financial penalties (20-100,000 days of minimum wage present in the Federal District of Mexico City when the crime was committed)<sup>13</sup>. Instances which threaten animal or human health are punishable by prison sentences. In most states, the Ministry of the Environments and Natural Resources take responsibility for enforcement, however this varies by location<sup>13</sup>. While authorities have the power to enforce federal law, the extent to which this power is exerted remains unclear<sup>13</sup>.

The Corruption Perceptions Index is used as a means of providing an objective appraisal of national governance. Mexico ranks 135/180 alongside Russia, Papua New Guinea and Laos, among others<sup>28</sup>. With a score of 29, Mexico is categorised as 'highly corrupt'<sup>28</sup>. The high levels of corruption present in Mexico cast doubt over the application of animal welfare laws, and the extent to which instances of mistreatment are investigated.

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## NGO ACTIVITY

Bullfighting is an accepted practice in Mexico, viewed as a national sport and as significant to its cultural identity<sup>31</sup>. It is partly for these reasons that movements to ban the activity have been unsuccessful at federal level<sup>32</sup>. Bans have occurred in certain states, led by Sonora in 2013, followed by Guerrero and Coahuila, and in October 2018 the federal district of Mexico City<sup>33</sup>. It has been reported that around 73% of Mexicans are in favour of a nationwide ban on bullfighting, and as such, further bans may occur in the future<sup>33</sup>.

The majority of NGO attention is focused on social issues (e.g. drug trafficking and corruption), however Mexico's involvement in the slaughter of horses does also receive some attention, largely due to them being viewed as companion animals in many cultures<sup>34</sup>. Nonetheless, animal welfare in general receives limited NGO attention in Mexico.

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## FARM ASSURANCE SCHEMES

In recent years the Mexican government has sought to increase herd sizes and provide genetic improvements in livestock<sup>4,5</sup>. To achieve this, the Mexican authorities have introduced two key projects: the Livestock Promotion Program, and the Genetic Improvement Program<sup>4</sup>. In 2017 around US\$42 million was distributed to the 65,000 participants in the Genetic Improvement Program<sup>35</sup>, however specific figures related to the Livestock Promotion Program are not widely available. It is likely that these projects will continue in the future<sup>4</sup>.

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