

CUSTOMERS

Mexico is a net exporter of fish, and seafood is imported mainly to fill gaps in the product line. The total live catch is estimated at more than 1.4 million tonnes for 1995. Direct consumption accounted for just over 1 million tonnes live, or about 9 kilograms per capita after processing. Fish consumption was reduced substantially by a cholera scare in 1993 to 1994, but it is gradually recovering. In 1995, imports were about 18,000 tonnes, which is about 1.3 percent of total consumption. Imported fish tends to fall into the upper price ranges and the import market share by value is substantially higher.

Mexicans generally prefer whole fish rather than filets. *Mojarra*, scaled fish, tuna and sardine are the principal retail products. The bulk of this product comes from domestic sources. But tastes have begun to change over the past few years. In 1995, chilled and frozen filets rose to 7.3 percent Mexico's seafood imports, up from 6.3 percent in 1994. Nonetheless, prepared, preserved, smoked and salted seafood continues to account for about 60 percent of the import market.

DISTRIBUTORS

Unreliability of supply is cited by both retailers and food service establishments as their biggest problem in handling fish and seafood products. Especially for fresh fish, many prefer to visit large markets in person so they can either take their purchases with them or arrange delivery.

Outside of the major cities, imported fish products are more likely to be handled by general food distributors rather than by fish specialists. There are several important distributors of fresh, frozen and canned food. At times these distributors complement their product lines with imported fish when it is available at competitive

prices. Major national distributors include *Grupo Sahauyo*, *Grupo Autrey*, Pacific Star and Master Chef.

FRESH SEAFOOD

In Mexico City, the main centre for distribution of fresh fish is *La Nueva Viga* next to the huge *Central de Abastos* food market. It is the largest distribution centre for fish in the country. Most sales there are made at *pie de bodega*, literally at the "foot of the warehouse." The centre has 258 companies registered in its directory and another 165 small, unregistered outlets in an adjoining section.

Monterrey and Guadalajara both have major seafood distributing centres known as *centros de acopio*. The three major markets in Mexico City, Guadalajara and Monterrey together handle about 20 percent of all Mexican fish consumption and most of its imports. Officials of *La Nueva Viga* say that the market handles more than 80 percent of all of Mexico's fresh fish. Mexican products dominate the fresh fish market. Imports are mostly from the US, although Canada provided Mexico with about US \$1.2 million worth of fresh fish in 1995.

FROZEN SEAFOOD

Most frozen produce is of American origin, with squid, surimi and salmon being especially popular. Canada's 1995 sales in this category were only US \$58,000 in 1995, about 1.2 percent of the import market. Any of the companies in *La Nueva Viga* may import frozen goods and some package them under their own brand name. The largest distributors are *Exim Caribe* and *StaMar*.

CANNED SEAFOOD

With the exception of tuna, canned fish is generally considered a luxury; therefore, imports are made mostly by delis or specialty distributors. The market is highly concentrated and

most canned goods are imported from Spain. Sardines are Canada's principal export in this category. Sales in 1994 totalled US \$1.1 million but they fell to US \$599,000 following the peso devaluation of December 1994. This reflects the fact that Canadian sardines are of better quality and are higher-priced than competing products.

Canned tuna is very inexpensive in Mexico, partly as a result of the American embargo. According to one estimate, a can of tuna costs an average 46 cents in Mexico, while in the US it averages US \$1.19 and in Europe, US \$1.29. Observers expect this situation to change abruptly when the embargo is lifted, and several Mexican tuna producers are reportedly working on plans to reenter the American market.

PRESERVED FISH

Several forms of preserved fish are popular in Mexico. Dehydrated salted fish, particularly cod, is especially popular during Lent and Christmas. Norwegian cod is popular, although Canada's sales have been growing and it claimed 26 percent of the dried cod import market in 1995.

FOOD SERVICE ESTABLISHMENTS AND SUPERMARKETS

Hotels rarely buy directly from importers. Most tourist resorts are on the coast and are supplied by the local catch. *La Torre* distributes to many hotels and restaurant chains including *Vips* and *Sanborn's*. They also supply all the large supermarket chains.

Most supermarket chains buy from importers or distributors. *Formex-Ybarra* supplies retail stores operated by the government for public employees, the *Universidad Nacional Autónoma de México (UNAM)*, National Autonomous University of Mexico, and the *Secretaría de la Defensa Nacional (Sedena)*, Secretariat of National Defence.