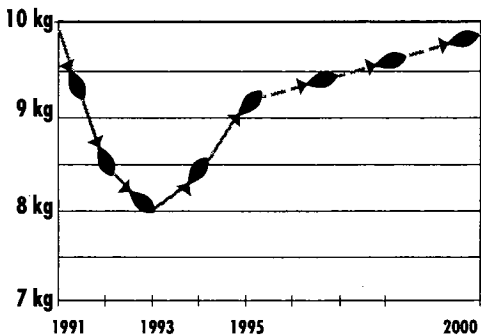


MEXICO'S FISHERY RESOURCE

PER CAPITA CONSUMPTION OF SEAFOOD



Source: Dirección de Estadísticas y Registro Pesquero, Secretaría del Medio Ambiente, Recursos Naturales y Pesca (Semarnap), Secretariat of Environment, Natural Resources and Fisheries, Banca Nacional de Comercio Exterior (Bancomext), Mexican Foreign Trade Commission.

Mexico has a huge fishery resource, but the fishing industry is inefficient and wasteful of scarce resources.

Mexico has one of the longest coastlines in the world, totalling 11,500 kilometres, including the offshore islands. It also has an exclusive economic zone (EEZ) which includes about three million square kilometres, in addition to its territorial waters. Close to three-quarters of the coastline borders on the Pacific Ocean, and the rest is on the Gulf of Mexico and the Caribbean Sea. The nation has almost three million hectares of continental waters.

A great variety of species is found in Mexican waters. Those of greatest commercial significance, are sardine, anchovy, tuna, shrimp and *mojarra* (*Gerreidae Perciformes*) a saltwater variety of fish from the same family as barracuda and bass, recognized for its potential as an easily raised and harvested food fish. The *mojarra* is also the most common species raised through aquaculture. Likewise, there is considerable interest in developing shrimp, catfish and trout farms. Lobster, red snapper, oyster, and abalone are still other commercially important species. Fishing accounts for about 1 percent of Mexico's gross domestic product (GDP), and it employs about 1.3 percent of the economically active population.

In spite of its economic importance, the fishery sector is not very well developed. The industry relies on small producers, using outdated technology, and supported by an inadequate infrastructure and poor distribution channels. Few fisheries workers have the knowledge to operate efficiently in the business. This situation is a legacy of decades of protectionist policies which focused on maximizing employment and self-sufficiency regardless of efficiency. Moreover, the nation's inability to distribute and market fish on a national scale has resulted in relatively low consumption levels for a nation with such enormous marine resources. Consumption of processed fish and seafood products is less than 10 kilograms per capita. According to other estimates, per capita consumption on a live weight basis has fallen from almost 20 kilograms per capita in 1981 to about 15 kilograms in 1994. Health scares, including an onset of cholera in the Gulf of Mexico region in 1993, were partly to blame.

Although Mexico is a net exporter of fish and seafood products, it must import a number of products for quality reasons. For example, even though sardines are Mexico's most important catch, the nation imported more than US \$4 million worth of higher-quality sardines in 1994. About one-quarter of this supply came from Canada. Industry experts say that Canadian sardines are higher quality, are better packaged, and taste better than the local product, allowing them to sell at premium prices.