

## 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.

## COMPETITORS

*Canadian products compete effectively in the high-quality medium-price market points against both Mexican and third-country alternatives.*

Mexican fish processors and distributors dominate the market, but direct competition for Canadian fish and seafood more often comes from other importing companies. Mexico has a more than adequate supply of fish. It mainly imports specialized products that are unavailable from Mexican sources, or else to obtain better quality products. Superior handling and packaging is regarded as a competitive advantage for importers. For this reason, Mexican seafood producers may be seen as potential joint venture partners as well as competitors.

Distributors of processed fish products tend to be sister companies to the processors and producers. *Dolores*, *Calmex*, *Formex-Ybarra* and *La Torre* are regarded as the principal companies in the sector. They tend to specialize in the capture, processing, distribution and sale of particular species. Other important producers include *Trinsa de Mazatlán*, *Empacadora Mar*, *Conservas del Pacífico*, and *Formex-Ybarra*, all of which are tuna packagers.

Processing centres are usually on the Pacific Coast, which includes 233 of Mexico's 309 fish processing plants. The rest are mostly on the Gulf Coast. Most products are sent to Mexico City for distribution to the rest of the country, although some companies have regional distribution centres in Tijuana, Guadalajara and Villahermosa.