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## MEXICO

### SUPPLY & CONSUMPTION

The disposable volume of lobster in the domestic market in 1991 reached over 1683 tonnes, an increase of 98.7%, compared to a decline of 2.7% in 1990. Per capita consumption of lobster went from 11.13 kilos in 1989 to 20.33 in 1991. Direct human consumption of lobster in 1991 is estimated at approximately 10.1 kilos, while indirect human consumption reached 10.23 kilos. Lobster is distributed in the Mexican consumer market whole-boiled-frozen (67%), fresh-frozen tails (28%) and as lobster pulp (5%). Lobster is a high-priced food item, which is affordable and consumed regularly only by the upper middle class and the wealthy sectors of the population.

Recently, imported surimi products (imitation crab and lobster made from inexpensive white fish) have entered the market. They are sold over supermarket fish counters, fish stores and served mostly at Japanese restaurants. Being a new and cheaper product (the price of imported surimi is but a fraction of that of real lobster), Mexican housewives tend to be willing to try surimi for a time, but the novelty soon wears off. On the other hand, surimi consumption in specialty restaurants is on the increase, but this trend represents no serious threat to the traditional consumption of real product.

The recorded imports of frozen rock lobster and other sea crayfish (*Palinurus, spp., Palunirus spp.* and/or *Jasus spp.*) totalled only 1435 kilos in 1991, compared to 16,254 kilos a year earlier. The major supplier of these products is the United States. There are major discrepancies between official Mexican statistics and Statistics Canada data, concerning Canadian lobster exports to Mexico. SECOFI import data for 1991 recorded only 322 kilos of *Homarus Americanus* lobster valued at US\$4074 as originating in Canada. On the other hand, Statistics Canada indicated a total of 3055 kilos (rock lobster and other crayfish) valued at Cdn\$16,000 exported to Mexico. One explanation for this is that products arriving at Mexico's northern border crossings are registered as entering from the United States.

### DISTRIBUTION SYSTEMS

The new La Viga fish market in metropolitan Mexico City is the largest and most modern in Latin America. It is the major distribution centre for all fisheries products, including lobster and crayfish. "Central de Pescados y Mariscos La Nueva Viga" is a modern facility for wholesale and retail of fisheries products, and home of the National Society of Fish and Seafood Distributors. Product is distributed from La Viga to other urban centres in the interior where lesser facilities receive and distribute to consumer outlets. Frozen lobster (whole-boiled and tails) is available wholesale or retail at La Viga, or from a number of supermarket chain stores and fisheries product retail markets. Leading gourmet restaurants and five star tourist hotels list lobster on their menus.

The domestic lobster fishery is reserved to cooperative operations. Product from these cooperatives is sold to intermediaries who bring the lobsters to distribution points located in the large urban centres such as Mexico City, Guadalajara, Monterrey, Acapulco, León, Tijuana, etc. These intermediaries and the wholesalers control the volume, price and quality of the product. An estimated 100,000 tonnes of fisheries products move through the La Viga fish market every year, and approximately 5% corresponds to crustaceans, including domestic crayfish and lobster.

Sales of imported seafoods to Mexico are usually made through local agents or distributors, who normally operate on a commission basis. Products coming into the country move from the exporter to the local agent or distributor, then delivered to the wholesaler, supermarkets, hotels and restaurants.