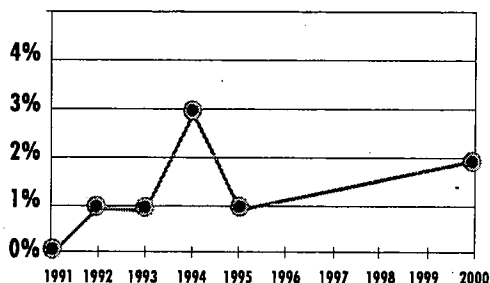


IMPORTS AS A PERCENTAGE OF CONSUMPTION



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

CONSUMERS

Imported fish appeals mainly to more affluent Mexicans, perhaps the top 20 percent of the income distribution. According to data published by the Mexican consulting firm *SIGMA Consultores*, households with an annual income of US \$9,680 in 1996 comprise just over one-fifth of the national population. These consumers reside almost entirely in the major cities. Middle and upper income households include almost 30 percent of the populations of Mexico City, Guadalajara and Monterrey. Those three cities include one-third of all Mexicans in those income groups, creating a market of about 7.5 million people who can afford imported food products. Other relatively affluent cities with a population of one million or more include Toluca, Puebla, León and Torreón.

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 and to 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 Sahaayo*, *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.