

Mexico's total apparent consumption of fish, crustaceans, molluscs and their products increased 13% in 1989 and another 14% in 1990, reaching over one million tons. Domestic production by far dominates the Mexican market and exports have until now surpassed imports. Production has increased 8% annually between 1988 and 1990, while the growth in imports was 55% during that same period, prompted mostly by major increases in imports of fish meal. Imports presently represent 7.1% of total apparent consumption, up from 3.8% in 1988. The Mexican market for these products is expected to continue increasing at an average annual rate of 3.5% to reach \$1.2 billion by 1994. Local production is projected to grow 4% annually, while imports will grow at a slightly faster pace of 8%, as the purchasing power continues to increase. This will translate into an increased participation of imports in total apparent consumption, from the present 7% to 8% by 1994.

The total Mexican market can further be divided into three sections: fresh products; frozen, canned and otherwise transformed products for human consumption; and fish meals and oils. The following table shows apparent consumption in each of these sectors for 1989 and 1990.

TABLE 2
APPARENT CONSUMPTION BY SECTOR
(000 tons)

	FRESH PRODUCTS		PROCESSED PROD.		OIL & MEALS	
	1989	1990	1989	1990	1989	1990
Production	733.6	779.2	178.1	213.1	106.9	95.8
+ Imports	1.7	1.4	4.7	6.1	44.1	69.2
- Exports	50.5	26.3	70.3	58.3	0.9	1.2
TOTAL	684.8	754.3	112.5	160.9	150.1	163.8

Source: Production: Secretaría de Pesca

Imports and exports: Secretaría de Comercio y Fomento Industrial.

As can be seen in this table, in all three sectors, local production covers the majority of apparent consumption. However, imports play the most significant role in the market segment for fish oil and meals, where they represent 42% of total apparent consumption. In the case of processed products, imports cover 3.8% of the market, while they only represent 0.2% of the market for fresh products.