

## CUSTOMERS

*Only the most affluent Mexicans can afford imported food products, but the top 20 percent of the income distribution comprises a market of some 7.5 million consumers.*

Mexico is a net exporter of fish and seafood is imported mainly to fill gaps in the product line. The total live catch is estimated at more than 1.4 million tonnes for 1995. Direct consumption accounted for just over 1 million tonnes live, or about 9 kilograms per capita after processing. Fish consumption was reduced substantially by a cholera scare in 1993 to 1994, but it is gradually recovering. In 1995, imports were about 18,000 tonnes, which is about 1.3 percent of total consumption. Imported fish tends to fall into the upper price ranges and the import market share by value is substantially higher.

Mexicans generally prefer whole fish rather than filets. *Mojarra*, scaled fish, tuna and sardine are the principal retail products. The bulk of this product comes from domestic sources. But tastes have begun to change over the past few years. In 1995, chilled and frozen filets rose to 7.3 percent Mexico's seafood imports, up from 6.3 percent in 1994. Nonetheless, prepared, preserved, smoked and salted seafood continues to account for about 60 percent of the import market.

### MEXICAN MARKET FOR SEAFOOD, 1991 TO 1995 AND PROJECTED TO 2000

'000 METRIC TONNES, LIVE WEIGHT

	1991	1992	1993	1994	1995	2000
Total live catch	1,494	1,257	1,216	1,281	1,454	1,510
Imports	6	9	13	39	18	32
Exports	58	32	38	64	68	74
<b>Consumption</b>						
Indirect	385	220	165	217	321	353
Direct	1,013	963	965	1,006	1,034	1,100
Industrial use	56	63	61	37	49	62
<b>Total consumption</b>	<b>1,454</b>	<b>1,246</b>	<b>1,191</b>	<b>1,260</b>	<b>1,404</b>	<b>1,515</b>

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.