

Trade (GATT) on August 24, 1986 leading to an extensive trade liberalization process: import permits were eliminated on all but 325 of the total 11,950 tariff items based on the Harmonized System adopted in 1989. Official import prices are no longer applicable, nor the 5% export development tax, and import duties were lowered from a maximum of 100% in 1982 to 20% in January 1988. The weighted average tariff rate is now 10.4%. The automotive and computer industries have also been liberalized, through the elimination of prior import permits, to allow free entry of products in these industries. The approval of the North American free trade agreement will further strengthen trade between Canada, the United States and Mexico.

According to official data from the Mexican Secretariat of Commerce and Industrial Development (SECOFI), Mexico's trade balance in 1990 dropped once again to a \$3 billion deficit from -\$645 million in 1989. Exports increased by 17.6% in 1990, from \$22.8 billion to \$26.8 billion, while imports grew 27.2%, from \$23.4 billion to \$29.8 billion, having already increased 48% from \$12.2 billion in 1988 and 23.8% in 1989.

Total Mexican imports from Canada increased 24% in 1989 and decreased 1.5% in 1990. Total Canadian exports to Mexico amounted to Cdn\$594 million, while total Canadian imports from Mexico were valued at Cdn\$1,730 million in 1990. According to Mexican figures, in 1989, 1.9% of Mexico's imports came from Canada, while 1.2% of its exports were to Canada. This makes Canada Mexico's fifth largest exporter and sixth largest importer.

### 3. MARKET ASSESSMENT

#### 3.1 APPARENT CONSUMPTION

The following table shows Mexico's total apparent consumption of fish and fish products, including fresh and frozen, prepared or preserved fish, crustaceans and molluscs; fish oils and fats; and fish flours, meals and pellets.

**TABLE 1**  
**TOTAL APPARENT CONSUMPTION OF FISH**  
**AND FISH PRODUCTS**  
(000 metric tons)

	1988	1989	1990	1994p
Production	934.6	1,018.6	1,088.1	1,272.9
+ Imports	32.0	50.5	76.7	104.3
- Exports	129.3	121.7	85.8	132.6
<b>TOTAL</b>	<b>837.3</b>	<b>947.4</b>	<b>1,079.0</b>	<b>1,244.6</b>

p = projected

Source: Production: Secretaría de Pesca

Imports and exports: Secretaría de Comercio y Fomento Industrial.