

Mexican tuna producers are hoping that the embargo will be completely lifted in 1997. This will lead to increased prices, which will create more demand for sardines. In addition, the domestic sardine catch has been falling and some analysts are predicting a supply shortage for 1997.

About 80 percent of canned tuna sales are for the oil-packed variety, with the rest packed in water. Tomato-packed sardines are the most popular, with up to 70 percent of the market, and the rest is oil-packed.

In the case of sardines, Brunswick has been relatively successful. Mexican observers believe that the packaging of Canadian sardines is the key to its positive image and relatively high price-position. On the other hand, this market niche is considered saturated and there are probably only limited opportunities for additional Canadian suppliers.

The second most popular type of canned fish are purchased for hors d'œuvres. This includes octopus, squid, scallops, abalone and mussels. The most common varieties are packed in oil, garlic oil, tomato or pickling preparations. Most of these products are imported from Spain and are considered a luxury.

The third most popular canned product is mackerel, also known in Mexico as "skipjack tuna." This is a less-expensive substitute for sardines, and sales have increased since the devaluation of the peso in 1994.

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## FRESH FISH

The fresh fish market is divided into shellfish and scalefish components. In the scalefish sector, the most popular domestic varieties are snapper, yellowfin snook (gurnard), striped *mojarra*, sawfish, and wahoo. The most popular fresh shellfish are shrimp and oyster.

Demand is heavily influenced by price fluctuations and purchasing power. Prices fluctuate widely because of sporadic production levels. Imports are more prevalent during the off-season. There is a large amount of substitution of one fish for another, as consumers react to price changes.

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## PRESERVED FISH

Salt cod is popular in Mexico. Traditionally most of it has been imported from Norway, but recently, lower-priced Canadian cod has been making inroads in the market. In 1995, Canada's share of dried cod imports rose to 26 percent from 17 percent a year earlier, even though the volume dropped by about 40 percent.