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# Fish and Sea Products



## THE OPPORTUNITY

Although Mexico is nearly self-sufficient in fish and seafood products, there are a number of interesting opportunities for Canadian suppliers in the Mexican market.

- Some Canadian products, such as sardines, are making inroads in the Mexican market because they are recognized as higher-quality than comparable domestic products and can command a higher price.
- Some Canadian products, such as salt cod, are rapidly gaining market share because they are cheaper than competing products from Europe, especially under the North American Free Trade Agreement (NAFTA).
- Mexican fishing and fish processing operations are in desperate need of modernization, both of which represent opportunities for joint ventures with Canadian companies.
- The Mexican government is encouraging foreign investment in the aquaculture industry which, although small, is growing rapidly.

## MEXICO'S FISHERY RESOURCE

Mexico has one of the longest coastlines in the world, totalling 11,500 kilometres, including the offshore islands. It also has an

exclusive economic zone (EEZ) which includes about three million square kilometres, in addition to its territorial waters. Close to three-quarters of the coastline borders the Pacific Ocean, and the rest is on the Gulf of Mexico and the Caribbean Sea. The nation has almost three million hectares of continental waters.

A great variety of species is found in Mexican waters. Those of greatest commercial significance, are sardine and anchovy, tuna, shrimp and *mojarra* (*Gerreidae Perciformes*) a saltwater variety of fish from the same family as barracuda and bass, recognized for its potential as an easily raised and harvested food fish. The *mojarra* is also the most common species raised through aquaculture. Likewise, there is considerable interest in developing shrimp, catfish and trout farms. Lobster, red snapper, oyster, and abalone are other commercially important species. Fishing accounts for about 1 percent of Mexico's GDP, and it employs about 1.3 percent of the economically active population.

In spite of its economic importance, the fishery sector is not very well developed. The industry relies on small producers, using outdated technology, supported by inadequate infrastructure and poor distribution

## SUMMARY REPORT

In addition to this market summary, the Department of Foreign Affairs and International Trade (DFAIT) has prepared a market profile entitled **Opportunities in Mexico: Fish and Sea Products**. This market information on Mexican fish and sea products has been produced and published by Prospectus Inc. under contract with DFAIT, along with other market profiles and summaries on business opportunities in Mexico. It is available from:

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The market profiles are available in electronic form from the IBB and in hard copy at a cost of \$10.00 plus shipping and applicable taxes, from Prospectus Inc. Please contact:

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channels. Few fisheries workers have the knowledge to operate efficiently in the business. This situation is a legacy of decades of protectionist policies which focused on maximizing employment and self-sufficiency regardless of efficiency. Moreover, the nation's inability to distribute and market fish on a national scale has resulted in relatively low consumption levels for a nation with such enormous marine resources. Consumption of processed fish and seafood products is less than 10 kilograms per capita.

Poor management of the fish stock has resulted in depleted resources in several parts of the country and there are serious concerns about the long-term future of the industry. Environmentally inappropriate fishing practices have led to an embargo on tuna imports into the United States and a consumer boycott of Mexican shrimp.

The government has recognized that this situation cannot continue; for that reason it has acted to develop the industry and to bring in modern fishery management techniques. The *Programa de Pesca y Acuicultura 1995-2000*, Fisheries and Aquaculture Development Program, is focused on improved infrastructure, better resource management techniques, the restoration of endangered fish stocks and the expansion of aquaculture.

As the industry develops and modernizes, there will be many opportunities for Canadian producers of seafood products. In spite of Mexico's relative self-sufficiency in these products, there are a number of important niches, including sardine, lobster, salt cod, and smoked salmon, where Canadian products can be competitive. There are also many openings for joint ventures between Canadian fish producers and their less well-developed counterparts in Mexico.

## THE MEXICAN FISHING INDUSTRY

Mexico's fishery resource includes more than 800 species of fish and other seafood. Fish of commercial significance include tuna, sardine, anchovy, red snapper, mullet and king mackerel. Crustaceans and mollusks include shrimp, lobster, abalone, oyster, clams and octopus. Total production in 1995 was about 1.4 million tonnes live. Of this, 1,034 thousand tonnes ended up as processed fish for human consumption, while 321 thousand tonnes and 42 thousand tonnes went to indirect consumption and industrial uses, respectively. By weight, the most important species produced were tuna, *mojarra*, shrimp and sardines, in that order. These four species accounted for about 35 percent of direct consumption in 1995, according to estimates of the *Secretaría del Medio Ambiente, Recursos Naturales y Pesca (Semarnap)*, Secretariat of Environment, Natural Resources and Fisheries. Other important categories included squid, oyster, skipjack and carp.

## REGIONAL DISTRIBUTION

For analytical purposes, the Mexican fishery is usually divided into four major areas:

- The North Pacific produces shrimp, tuna, lobster, sardine, anchovy, abalone, mussel, clam, sea urchin, sea cucumber and mackerel. This area produces close to 60 percent of Mexico's annual catch.
- The Central-South Pacific produces oyster, shark, tuna, swordfish, crawfish, shrimp, red snapper, king mackerel, catfish, octopus, snook and mullet. This area produces about 10 percent of the catch.
- The Gulf of Mexico and Caribbean produces shrimp, mullet, oyster,

dogfish, red and yellowtail snapper, mackerel, snook, lobster, crab and octopus. This area produces about 27 percent of the catch.

- Landlocked states have a largely undeveloped potential for aquaculture based on freshwater species, including *talipia*, blue gill, carp, black bass and frogs. This area produces about 3 percent of the catch.

## FISHING FLEET

In 1995, there were just under 75,000 fishing craft registered with the *Secretaría del Medio Ambiente, Recursos Naturales y Pesca (Semarnap)*, Secretariat of Environment, Natural Resources and Fisheries. Of these, more than 95 percent are small craft, of less than 10 tonnes, that are dedicated to coastal and inland cottage-industry fishing. Many of them are not even equipped with radios, much less modern navigational equipment, and an estimated 12 percent of the catch is by "informal" operators who do not report their production.

The fleet is almost equally divided between the Pacific, Gulf and Caribbean coasts, with about 4 percent of the craft operating in inland waters. Fewer than 3,300 boats are considered part of the high sea fleet, and they concentrate mainly on shrimp, tuna, sardine and anchovy. Shrimp boats alone make up about 69 percent of the high seas fleet. Another 26 percent specialized in scalefish, with the rest being tuna and sardine/anchovy boats. In 1996, there were 59 ports available to service the fishing industry, which included 28 kilometres of jetty.

## PROCESSING PLANTS

Mexico has more than 300 fish processing plants. Close to three-quarters are located on the Pacific Coast. The Mexican government has active

programs to modernize the fish processing sector. In particular, there is considerable interest in developing products for mass consumption such as fish paste and frozen fish fillets. This will require the modernization of fish processing plants. In 1995, about one-third of the landed catch was frozen, almost 20 percent was canned, and most of the rest was cut up.

### DEVELOPMENT PLANS

During its first year in office, the government of President Ernesto Zedillo issued its six-year program for the development of the fishery. It called for the expansion of fishing infrastructure and production capacity to be balanced by the development of more modern models of fishery management in order to prevent over-exploitation. The government's other priorities include modernizing the fishing fleet, rehabilitating coastal ecosystems, and developing aquaculture.

### THE ROLE OF FOREIGN TRADE

Mexico is a net exporter of fish and seafood products, but it relies on imports for some products, most of which fall into the luxury categories. By weight, imports account for only about 1.3 percent of domestic sales, but there are important markets for certain niche products.

Imports were sharply curtailed as a result of the December 1994 devaluation of the peso, which roughly doubled the cost of imports. Total fish and seafood imports fell by 61 percent from US \$101.6 in 1994, to \$40.1 million in 1995. The US claims about half the import market.

Canada's share of the import market rose from 9 percent in 1994, to 11 percent in 1995, although sales fell from US \$9.1 million to US \$4.4 million as a result of the devaluation crisis. This

market share is considerably higher than for most other food products. Smoked, dried and salted fish of all types made up close to half of Canada's 1995 exports, and this category was the only one to increase during 1995. Dried cod is the most important single product, with 1994 sales of US \$1.5 million. Cod and hake are the most popular species sold in the chilled category, with US \$1.2 million in 1994 sales. Canadian exports of fresh lobsters, which amounted to about US \$342,000 in 1994, dropped sharply to only US \$52,000 in 1995, reflecting the luxury status of that product.

### AQUACULTURE

Mexico has a significant aquaculture industry which is based mainly on traditional methods, such as small-pond cultivation of fresh water species. Total aquaculture production was about 158,000 tonnes in 1995, of which almost half was *mojarra*. But the government believes that greater use of non-traditional methods could greatly expand production. Changes to the the *Ley de Pesca y su Reglamento*, Fishery Law and its Regulation, in 1992 encouraged a substantial increase in private investment in this sector. Among other measures, it allows for 50-year operating licences for private facilities. Private capital, including foreign investment, is now seen as essential to develop the potential of the entire fishery sector.

The government maintains almost 40 aquaculture centres throughout the country and it has been operating a largescale training program for several years. The objective is to expand capacity for a broader range of species, especially higher-value products.

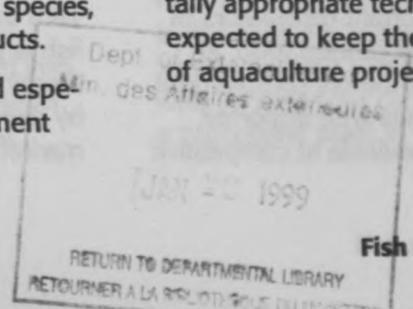
Shrimp farming is considered especially promising. The government

has been promoting a method which consists of capturing live larvae and hatching and raising the shrimp in captivity. Foreign investment has played a large role in the expansion of this subsector.

The government hopes to develop more saltwater aquaculture projects, including inland salt-water ponds as well as offshore cage technologies, sometimes known as "mariculture." Technology for this approach has been tested in the Gulf of Mexico off the coast of Alabama state, but not, so far, in Mexico.

Mexico's Fisheries Secretariat is now part of the *Secretaría del Medio Ambiente, Recursos Naturales y Pesca (Semarnap)*, Secretariat of Environment, Natural Resources and Fisheries. With the mariculture objective in mind, the Fisheries Secretariat launched a major development program called the *Desarrollo de la Acuicultura en México (DAM)*, Mexico Aquaculture Project, in 1994. It is supported by US \$300 million in World Bank funding, US \$150 million from the Government of Mexico, and another US \$50 million from private companies. Activities include sponsoring private research projects designed to develop aquaculture technologies and management of coastal resources in seven states.

The ultimate objective of the *Desarrollo de la Acuicultura en México* is to demonstrate the viability of different types of aquaculture technologies. Projects sponsored by the program are expected to become operational over the six-year period that ends in 2000. Environmental and social impact studies for the project were completed in 1995. Increased pressure for environmentally appropriate technologies is expected to keep the foreign content of aquaculture projects high.



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## CUSTOMERS

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.

## 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 so they can 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 Sahauyo*, *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.

## FROZEN SEAFOOD

Most frozen produce is of American origin, with squid, surimi and salmon being especially popular. Canada's 1995 sales in this category were only US \$58,000 in 1995, about 1.2 percent of the import market. Any of the companies in *La Nueva Viga* may import frozen goods and some package them under their own brand name. The largest distributors are *Exim Caribe* and *StaMar*.

## CANNED SEAFOOD

With the exception of tuna, canned fish is generally considered a luxury; therefore, imports are made mostly by delis or specialty distributors. The market is highly concentrated and

most canned goods are imported from Spain. Sardines are Canada's principal export in this category. Sales in 1994 totalled US \$1.1 million but they fell to US \$599,000 following the peso devaluation of December 1994. This reflects the fact that Canadian sardines are of better quality and are higher-priced than competing products.

Canned tuna is very inexpensive in Mexico, partly as a result of the American embargo. According to one estimate, a can of tuna costs an average 46 cents in Mexico, while in the US it averages US \$1.19 and in Europe, US \$1.29. Observers expect this situation to change abruptly when the embargo is lifted, and several Mexican tuna producers are reportedly working on plans to reenter the American market.

## PRESERVED FISH

Several forms of preserved fish are popular in Mexico. Dehydrated salted fish, particularly cod, is especially popular during Lent and Christmas. Norwegian cod is popular, although Canada's sales have been growing and it claimed 26 percent of the dried cod import market in 1995.

## FOOD SERVICE ESTABLISHMENTS AND SUPERMARKETS

Hotels rarely buy directly from importers. Most tourist resorts are on the coast and are supplied by the local catch. *La Torre* distributes to many hotels and restaurant chains including *Vips* and *Sanborn's*. They also supply all the large supermarket chains.

Most supermarket chains buy from importers or distributors. *Formex-Ybarra* supplies retail stores operated by the government for public employees, the *Universidad Nacional Autónoma de México (UNAM)*, National Autonomous University of Mexico, and the *Secretaría de la Defensa Nacional (Sedena)*, Secretariat of National Defence.

## COMPETITORS

Mexican fish processors and distributors dominate the market, but direct competition for Canadian fish and seafood more often comes from other importing companies. Mexico has a more than adequate supply of fish. It mainly imports specialized products that are unavailable from Mexican sources, or else to obtain better quality products. Superior handling and packaging is regarded as a competitive advantage for importers. For this reason, Mexican seafood producers may be seen as potential joint venture partners as well as competitors.

Distributors of processed fish products tend to be sister companies to the processors and producers. *Dolores, Calmex, Formex-Ybarra* and *La Torre* are regarded as the principal companies in the sector. They tend to specialize in the capture, processing, distribution and sale of particular species. Other important producers include *Trinsa de Mazatlán, Empacadora Mar, Conservas del Pacífico*, and *Formex-Ybarra*, all of which are tuna packagers.

Processing centres are usually on the Pacific Coast, which includes 233 of Mexico's 309 fish processing plants. The rest are mostly on the Gulf Coast. Most products are sent to Mexico City for distribution to the rest of the country, although some companies have regional distribution centres in Tijuana, Guadalajara and Villahermosa.

## TRENDS AND OPPORTUNITIES

Considering that Mexico has substantial fishery resources, seafood is a relatively small part of the national diet. Per capita consumption is about 9 kilograms. This has been attributed to a lack of promotional efforts on

behalf of both the public and private sectors, and also to poor distribution and storage facilities which have historically made fish expensive and kept quality low.

## CANNED PRODUCTS

Traditionally, sardine and tuna have been the most popular canned fish products. Recently, consumption of sardine has fallen because prices of tuna have been low. Concerns about cholera infection, combined with a surplus of tuna because of the American embargo on Mexican tuna, have depressed demand. Mexican production of tuna is strong and domestic prices are lower than for tuna from Thailand, which is considered the world leader.

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.

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.

## 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, 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.

## 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.

## TRANSPORTATION

Poor distribution systems is one of the reasons that Mexican seafood consumption is relatively low. There are opportunities for the design, construction and operation of systems for refrigerating and transporting fish products. Freezing and frozen-storage facilities will become increasingly important as Mexico develops its fish export business.

## JOINT VENTURES

Industry observers believe that there are opportunities for joint ventures with Canadian companies who could assist fishing and processing operations to modernize and integrate. Most of them, however, lack capital and expect the Canadian partner to bring financing as well as expertise.

Although Canadian companies should be cautious in the selection of partners, there are emerging opportunities in this area. For example, *Formex-Ybarra* entered into a joint venture with an American company to build a processing plant in Chiapas that



will become the third-largest in Latin America. The plant includes freezing, smoking, and ice-making facilities. The company is now looking for partners to start exporting squid.

## THE REGULATORY ENVIRONMENT

Article 27 of the Mexican constitution establishes the fishery as a national resource, subject to special regulation. The exploitation of this resource is limited to Mexican citizens, with foreign ownership of fishing companies being limited to 49 percent under the 1992 Foreign Investment Law. Foreign investors may, however, own up to 100 percent of storage, distribution, processing and marketing operations as well as aquaculture operations.

A series of *Normas Oficiales Mexicanas (NOMs)*, official standards, regulate the fishing industry. These are issued under the authority of the *Ley de Pesca y su Reglamento*, Fishery Law and its regulation. There are separate *NOMs* covering the harvest of tuna, sardine, shellfish, abalone, lobster, sea urchin and octopus. Several additional standards are concerned with sanitary standards for fish products, and others govern specific fishing zones.

The Government of Mexico also regulates the safety of food products sold to the public, under the *Ley General de Salud*, General Health Law. All fish and seafood products, whether fresh, frozen or preserved, must meet food safety regulations administered by the *Secretaría de Salud (SS)*, Secretariat of Health. These regulations can be complex, and are subject to frequent revision. In general, it is the importer's responsibility to see that all sanitary requirements are met and permits obtained. But the exporter must assist, to ensure that proper documentation is available.

## MARKET ENTRY STRATEGIES

Although imports from Canada have grown, Canadian fish products are not well known in the Mexican market. The general concept of Canada as a clean country helps to create a positive image for fish products, but there is still little brand name recognition. In recent interviews, the only Canadian brand names that distributors and merchants consistently named were Brunswick sardines and Ice Cap salmon. The Mex-Can and Wood Bay brand names were occasionally mentioned. In spite of this, Canada claims around 10 percent of the import market, which is better than for most other food products.

Canadian companies that have succeeded in Mexico frequently say that establishing a visible presence in the market is essential. Some establish relationships with Mexican agents. Others have found that partnerships with Mexican companies are a powerful way of overcoming cultural and language barriers. On the other hand, some companies say that in order to establish a major market presence, a representative office or Mexican subsidiary may be needed.

In a partnership or joint venture, the Canadian partner typically supplies technology, management know-how and capital. The Mexican partner provides market knowledge and access, as well as the labour for local value added. This type of partnership is particularly attractive to local companies because capital is both scarce and expensive in Mexico.

For fresh fish, the best way to approach the market is to contact merchants at *La Nueva Viga* in Mexico City. Some merchants there say they are skeptical of Canadian suppliers, however, because some have been unable to supply adequate quantities of the products listed in their promotional materials.

Prospective exporters should be able to assure buyers that they maintain reliable supplies. Flexible prices are also essential in this highly-competitive market. Although Canadian products tend to appeal to upscale markets, high quality combined with medium price-levels is an effective combination.

Canadian suppliers should contact the principal distributors and importers. Lists of contacts can be obtained from industry associations. The *Cámara Nacional de la Industria Pesquera (Canainpes)*, National Fishing Industry Chamber, mostly represents the large producers. The *Sociedad Nacional de Introdutores y Distribuidores de Pescados y Mariscos*, Fish and Seafood Distributor's Association, represents 420 distributors and wholesalers, most of which are in *La Nueva Viga*. The *Cámara Nacional de la Industria de Conservas Alimenticias*, Food Preservation Industry Chamber, represents the processed food industry association, which includes fish processors.

Many companies locate prospective partners by attending industry trade shows. The Canadian embassy in Mexico City and the consulates in Monterrey and Guadalajara can also assist Canadian companies who have developed an export strategy.

## KEY CONTACTS

### CANADA

#### *Canadian Government*

#### *Department of Foreign Affairs and International Trade (DFAIT)*

DFAIT is the Canadian federal government department most directly responsible for trade development. The **InfoCentre** should be the first contact point for advice on how to start exporting. It provides information on export-related programs and services, acts as an entry point to DFAIT's trade information network, and can provide copies of specialized

export publications and market information to interested companies.

#### **InfoCentre**

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**The Trade and Economic Division of the Embassy of Canada in Mexico** can provide vital assistance to Canadians venturing into the Mexican market. The trade commissioners are well-informed about the market and will respond in whatever measures possible to support a Canadian firm's presence in Mexico.

#### **Trade and Economic Division**

The Embassy of Canada in Mexico

Schiller No. 529

Col. Polanco

11560 México, D.F.

México

Tel.: (52-5) 724-7900

Fax: (52-5) 724-7982

#### **Canadian Consulate**

Edificio Kalos, Piso C-1

Local 108-A

Zaragoza y Constitución

64000 Monterrey, Nuevo León

México

Tel.: (52-8) 344-3200

Fax: (52-8) 344-3048

#### **Canadian Consulate**

Hotel Fiesta Americana

Local 30-A

Aurelio Aceves No. 225

Col. Vallarta Poniente

44110 Guadalajara, Jalisco

México

Tel.: (52-3) 616-6215

Fax: (52-3) 615-8665

**International Trade Centres** have been established across the country as a convenient point of contact to support the exporting efforts of Canadian firms. The centres operate under the guidance of DFAIT and all have resident trade commissioners. They help companies determine whether or not they are ready to export, assist firms with market research and planning, provide access to government programs designed to promote exports, and arrange for assistance from the trade commissioners in Ottawa and trade officers abroad. Contact the International Trade Centre nearest you.

**World Information Network for Exports (WIN Exports)** is a computer-based information system designed by DFAIT to help Canada's trade development officers abroad match foreign needs to Canadian capabilities. It provides users with information on the capabilities, experience and interests of more than 24,000 Canadian exporters. For general information, call (613) 944-4WIN (4946); to register on WIN Exports, call (613) 996-2057, or fax 1-800-667-3802 or (613) 944-1078.

#### **Program for Export Market Development (PEMD)**

PEMD is DFAIT's primary export promotion program. It supports a variety of activities to help Canadian companies expand into export markets. PEMD shares up to 50 percent of eligible expenses. Program financial assistance is a repayable contribution, not a grant, and must be approved in advance. For general information, call the InfoCentre at 1-800-267-8376. For applications for assistance through this program, call the International Trade Centre nearest you. In Quebec, PEMD is administered by the 13 regional offices of the Federal Office of Regional Development (FORD Q).

#### **Fisheries and Oceans**

##### **Inspection and Enforcement Directorate**

Fisheries and Oceans

200 Kent Street

Ottawa, ON K1A 0E6

Tel.: (613) 990-0412

Fax: (613) 993-4220

##### **Canadian International Development Agency (CIDA)**

CIDA is an important possible source of financing for Canadian ventures in Mexico. A special fund is available through CIDA under the Industrial Cooperation Program (INC). This program provides financial contributions to stimulate Canadian private-sector involvement in developing countries by supporting long-term business relationships such as joint ventures and licensing arrangements. For more information, call (819) 997-7905, or fax (819) 953-5024.

##### **Export Development Corporation (EDC)**

EDC helps Canadian exporters compete in world markets by providing a wide range of financial and risk management services, including export credit insurance, financing to foreign buyers of Canadian goods and services, and guarantees.

EDC has established relationships with leading commercial and public sector institutions in Mexico and Latin America. For information on the full range of EDC services, call (613) 598-2500, or fax (613) 598-6858.

##### **Revenue Canada**

Revenue Canada, Trade Administration Branch provides service in English, French and Spanish. Revenue Canada publications and customs notices are also available by calling or faxing the NAFTA Information Desk: 1-800-661-6121 or (613) 941-0965; fax: (613) 952-0022.

**Business and Professional Associations**

**Canadian Association of Fish Exporters**

1770 Woodward Drive  
Ottawa, ON K2C 0P8  
Tel.: (613) 228-9220  
Fax: (613) 228-9223

**Canadian Aquaculture Industry Association**

45 O'Connor Street  
Ottawa, ON K1P 1A4  
Tel.: (613) 788-6851  
Fax: (613) 235-7012

**Canadian Council for the Americas**

Executive Offices  
360 Bay Street  
Suite 300  
Toronto, ON M5H 2V6  
Tel.: (416) 367-4313  
Fax: (416) 367-5460

**Alliance of Manufacturers and Exporters Canada**

99 Bank Street  
Suite 250  
Ottawa, ON K1P 6B9  
Tel.: (613) 238-8888  
Fax: (613) 563-9218

**Alliance of Manufacturers and Exporters Canada**

75 International Boulevard  
Fourth Floor  
Etobicoke, ON M9W 6L9  
Tel.: (416) 798-8000  
Fax: (416) 798-8050

**The Canadian Chamber of Commerce**

55 Metcalfe Street  
Suite 1160  
Ottawa, ON K1P 6N4  
Tel.: (613) 238-4000  
Fax: (613) 238-7643

**Forum for International Trade and Training Inc.**

155 Queen Street  
Suite 608  
Ottawa, ON K1P 6L1  
Tel.: (613) 230-3553  
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**Language Information Centre**

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Box 55011  
Ottawa, ON K1P 1A1  
Tel.: (613) 523-3510

**Open Bidding Service**

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Tel.: 1-800-361-4637 or  
(613) 737-3374

**Canadian Standards Association**

178 Rexdale Blvd.  
Etobicoke, ON M9W 1R3  
Tel.: (416) 747-4000  
Fax: (416) 747-4149

**Standards Council of Canada**

45 O'Connor Street  
Suite 1200  
Ottawa, ON K1P 6N7  
Tel.: (613) 238-3222  
Fax: (613) 995-4564

**Mexican Embassy in Canada**

**Embassy of Mexico**  
45 O'Connor Street  
Suite 1500  
Ottawa, ON K1P 1A4  
Tel.: (613) 233-8988  
Fax: (613) 235-9123

**MEXICO**

**National Government Offices and Agencies**

**Secretariat of Environment, Natural Resources and Fisheries International Seafood Issues**

*Secretaría del Medio Ambiente, Recursos Naturales y Pesca (Semarnap)*

*Dir. Gral. de Fomento Pesquero*  
Periférico Sur. No. 4209, Piso 5  
Fraccionamiento Jardines de la Montaña  
Delegación Tlapan  
14210 México D.F.  
México

Tel.: (52-5) 628-0735  
Fax: (52-5) 628-0898

**Secretariat of Environment, Natural Resources and Fisheries Aquaculture Division**

*Secretaría del Medio Ambiente, Recursos Naturales y Pesca (Semarnap)*  
*Dirección General de Acuicultura*  
Cerrada de Trini No. 10  
Col. San Jerónimo, Delegación Magdalena Contreras  
10200 México, D.F.  
México  
Tel.: (52-5) 595-4345  
683-7022/7127  
Fax: (52-5) 595-2704

**Secretariat of Health Goods and Services Health Control Division**

*Secretaría de Salud (SS)*  
*Dir. Gral. de Control Sanitario de Bienes y Servicios*  
Donceles No. 39 Planta Baja  
Col. Centro  
06010 México D.F.  
México  
Tel.: (52-5) 521-3050/9134  
Fax: (52-5) 512-9628

**Federal Attorney Office for Environmental Protection**

*Procuraduría Federal para la Protección del Ambiente (Profepa)*  
Periférico Sur No. 5000, P.B.  
Col. Insurgentes Cuicuilco  
04530 México D.F.  
México  
Tel.: (52-5) 528-5540/46  
Fax: (52-5) 666-9462

**Secretariat of National Defence Secretary of the National Defence (Sedena)**

Blv. Ávila Camacho y Av. Industria Militar  
Col. Lomas de Sotelo  
11640 México, D.F.  
México  
Tel.: (52-5) 395-6766, 557-8971  
Fax: (52-5) 557-1370



**National Fishery Institute**

*Instituto Nacional de la Pesca (INP)*  
Av. Pitágoras No. 1320  
Col. Narvarte  
México D.F.  
México  
Tel.: (52-5) 688-9001 ext. 112 and 113  
Fax: (52-5) 601-2330

**National Ecology Institute  
Environmental Information and  
Assesment Office**

*Instituto Nacional de Ecología (INE)*  
*Dirección General de Gestión e  
Información Ambiental*  
Av. Revolución No. 1425  
Col. Tlacopac San Angel  
01040 México, D.F.  
México  
Tel.: (52-5) 624-3464  
Fax: (52-5) 624-3584

**Mexican Investment Board**

*Consejo Mexicano de Inversión (CMI)*  
Paseo de la Reforma No. 915  
Col. Lomas de Chapultepec  
11000 México, D.F.  
México  
Tel.: (52-5) 202-7804  
Fax: (52-5) 202-7925

**National Autonomous University  
of Mexico**

**Institute of Marine Science and  
Limnology**  
*Universidad Nacional Autónoma de  
México (UNAM)*  
*Instituto de Ciencias del Mar y  
Limnología*  
Ciudad Universitaria,  
Circuito exterior e/ Facultad de  
Veterinaria y el Instituto de Biología  
Delegación Coyoacán  
México, D.F.  
México  
Tel.: (52-5) 622-5770/5771/5805  
Fax: (52-5) 616-2745

**Inter-American Tropical Tuna  
Commission**

8604 La Jolla Shores Drive  
La Jolla, CA 92037-1508  
USA  
Tel.: (619) 546-7100  
Fax: (619) 546-7133

**Mexican Business and  
Professional Organizations**

**National Fishing Industry Chamber**

*Cámara Nacional de la Industria  
Pesquera (Canainpes)*  
*Delegación Tamaulipas*  
Calle Doctor Alarcón No. 202 Norte  
Colonia Centro  
89000 Tampico, Tamaulipas  
México  
Tel.: (52-12) 12-1731

**Fish and Seafood Distributor's  
Association**

*Sociedad Nacional de Introdutores  
y Distribuidores de Pescados y  
Mariscos*  
Prolongación Eje 6 Sur No. 560  
Col. Aculco  
09000 México, D.F.  
México  
Tel.: (52-5) 600-3663/3723/3543  
Fax: (52-5) 600-3483

**Jalisco Seafood Distributors  
Association**

*Asociación de Productores y  
Comerciantes de Pescados y  
Mariscos de Jalisco*  
Av. Pino Suárez No. 925  
Col. El Vigía  
45140 Zapopan, Jalisco  
México  
Tel.: (52-3) 636-2222  
Fax: (52-3) 656-9827

**Food Industry Chamber of Jalisco  
Camara de la Industria Alimenticia  
de Jalisco**

Av. Washington No. 1920  
44100 Guadalajara, Jalisco  
México  
Tel.: (52-3) 610-5079  
Fax: (52-3) 610-4179

**Major Mexican Distributors**

*Formex-Ybarra, S.A. de C.V.*  
Poniente 146 No. 658  
Col. Industrial Vallejo. C.P. 02300  
México, D.F.  
México  
Tel.: (52-5) 587-1077, 567-1583  
Fax: (52-5) 368-1720, 368-1751

*Grupo Casa Autrey, S.A. de C.V.*  
Av. Netzahualcoyotle No. 79  
Col. Centro  
06080 México, D.F.  
México  
Tel.: (52-5) 227-4500  
Fax: (52-5) 227-4560

**Trade Shows**

**Food Trade Fair**  
*ExpoAlimentos*  
September 3, 4, 5 1997  
*Asociación Promodora de  
Exposiciones Apex, A.C.*  
Av. Parque Fundidora No. 501  
Col. Obrera  
64010 Monterrey, Nuevo León  
México  
Tel.: (52-8) 369-6660  
Fax: (52-8) 369-6732

*Expo Tecnoalimentaria*  
Association of Mexican Food  
Technologists  
*Asociacion de Tecnólogos en  
Alimentos-Atam Exhibimex*  
Mar del Norte No. 5  
Col. San Alvaro  
02090 México, D.F.  
México  
Tel.: (52-5) 386-1368/1083  
Fax: (52-5) 386-1952

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