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OPPORTUNITIES IN MEXICO: FISH AND SEA PRODUCTS



Department of Foreign Affairs and International Trade
Ministère des Affaires étrangères et du Commerce international
Latin America & Caribbean Bureau

M A R K E T P R O F I L E - M E X I C O

Opportunities in Mexico: Fish and Sea Products was developed jointly by the Department of Foreign Affairs and International Trade (DFAIT) and Prospectus Inc.

This market profile is designed to provide an overview of the market for **fish and sea products** in Mexico. Although efforts have been made to avoid errors and inaccuracies in this document, it is not intended to be used as the only source of market information on this sector. We encourage the reader to use this publication as one of several resources for commercial dealings with Mexico.

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OPPORTUNITIES IN MEXICO:

FISH AND SEA PRODUCTS

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THE NORTH AMERICAN FREE TRADE AGREEMENT (NAFTA)

The NAFTA expands Canada's free-trade area of 270 million people into a market of close to 361 million — a market larger than the population of the 15 countries of the European Union and one with a total North American output of more than \$7 trillion.

Mexico is Canada's most important trading partner in Latin America. Two-way merchandise trade with Mexico was just under \$6.5 billion in 1995 and is expected to exceed \$8 billion by the end of the decade.

Canadian direct investment in Mexico is growing rapidly, increasing from \$452 million in 1992 to over \$1.2 billion in 1994.

This guide has been prepared with the problems inherent to the new exporter in mind. However, it is not exhaustive. The differing circumstances, interests and needs of individual companies will influence their strategies for the Mexican market.

Further assistance can be obtained by addressing requests to the International Trade Centres (see Where To Get Help) or contact the InfoCentre at:

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*FaxLink is a faxback system which provides summaries on a range of Mexican markets. It must be contacted through your fax machine. Dial from your fax phone and follow the voice prompt instructions.

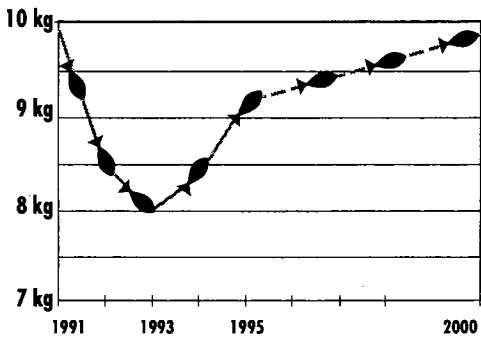
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MEXICO'S FISHERY RESOURCE

PER CAPITA CONSUMPTION OF SEAFOOD



Source: Dirección de Estadísticas y Registro Pesquero, Secretaría del Medio Ambiente, Recursos Naturales y Pesca (Semarnap), Secretariat of Environment, Natural Resources and Fisheries, Banca Nacional de Comercio Exterior (Bancomext), Mexican Foreign Trade Commission.

Mexico has a huge fishery resource, but the fishing industry is inefficient and wasteful of scarce resources.

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 on 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, 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 still other commercially important species. Fishing accounts for about 1 percent of Mexico's gross domestic product (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, and supported by an inadequate infrastructure and poor distribution 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. According to other estimates, per capita consumption on a live weight basis has fallen from almost 20 kilograms per capita in 1981 to about 15 kilograms in 1994. Health scares, including an onset of cholera in the Gulf of Mexico region in 1993, were partly to blame.

Although Mexico is a net exporter of fish and seafood products, it must import a number of products for quality reasons. For example, even though sardines are Mexico's most important catch, the nation imported more than US \$4 million worth of higher-quality sardines in 1994. About one-quarter of this supply came from Canada. Industry experts say that Canadian sardines are higher quality, are better packaged, and taste better than the local product, allowing them to sell at premium prices.

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. This plan has received mixed reactions from the fishing industry. While it will impose many new standards and regulations on fishing operators, it is generally recognized that higher productivity and improved marketing efforts are essential in today's liberalized trade environment.

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

The Mexican fishing fleet consists of more than 74,000 craft, but more than 95 percent of them are small craft of less than 10 tonnes, many of them lacking even the most basic electronics.

Mexico has more than 11,000 kilometres of coastline, and claims an exclusive economic zone (EEZ) of almost 3 million square kilometres. Its territory includes 1.5 million hectares of lagoons and estuaries. There are officially 371 islands, reefs and cays, as well as 336,000 square kilometres of continental shelf.

PRODUCTION

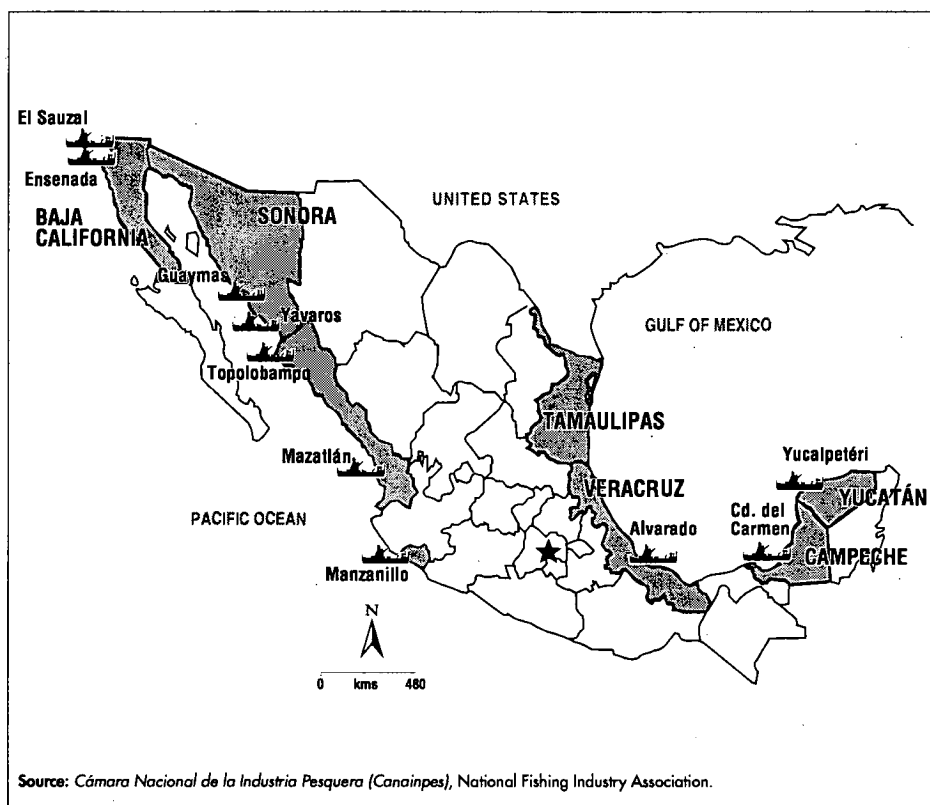
Mexico's fishery resource includes more than 800 species of fish and other seafood. Fish of commercial significance include tuna, sardine, anchovy, red snapper, mullet and king mackerel. Crustaceans and mollusks include shrimp, lobster, abalone, oyster, clams and octopus. Total production in 1995 was 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 from 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.

CONSUMPTION

Seafood consumption is heaviest along Mexico's coastal cities and towns, where retail prices are considerably lower than in inland centres. Government-funded marketing programs have not been successful at substantially increasing inland consumption, except in the major cities, and so the industry depends on export markets for its viability. The US and Japan are the principal markets. Sales have been hurt recently by a ban on imports of Mexican tuna into the United States. Mexico claims to have reduced dolphin mortality to less than one-half percent, and industry observers are optimistic that the ban will be lifted during 1997. Shrimp sales have been reduced by consumer boycotts associated with a turtle conservation campaign.

PRINCIPAL FISHING PORTS



CATCH BY SPECIES, 1995

TONNES

Species	Live Weight
Direct consumption	1,034,382
Tuna	108,224
Mojarra	90,972
Shrimp	85,901
Sardine	78,845
Squid	39,726
Oyster	31,892
Skipjack	30,688
Carp	27,506
Shark	21,501
Crab	21,052
Octopus	19,835
Grouper	13,384
Sawfish	12,810
Striped mullet	12,028
Shark	11,074
Clam	9,740
Snail	9,200
Red snapper	8,524
Bonito	7,862
White mullet	6,837
Trout	6,808
Bandera	6,116
Charal	5,659
Catfish	5,086
Snook	4,880
Prawn	4,379
Jack	4,256
Corvina	3,673
Wahoo	3,214
Yellowtail snapper	3,148
Mackerel	2,905
Sea urchin	2,746
Lobster	2,317
Croaker	2,038
Baqueta	1,687
Bass	1,235
Abalone	1,227
Others	115,447
Unregistered catches	209,959
Indirect consumption	320,509
Industrial Use	49,493
Total	1,404,384

Source: Secretaría del Medio Ambiente, Recursos Naturales y Pesca (Semarnap), Secretariat of Environment, Natural Resources and Fisheries.

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 *tilapia*, blue gill, carp, black bass and frogs. This area produces about 3 percent of the catch.

CATCH BY REGION, 1995

TONNES

	Live Weight	Percent of Catch
National Total	1,404,384	100.00
North Pacific Coast	836,274	59.55
Baja California	183,004	
Baja California Sur	130,461	
Sonora	358,919	
Sinaloa	163,890	
Central-South Pacific Coast	148,659	10.59
Nayarit	14,592	
Jalisco	19,313	
Colima	27,856	
Michoacán	30,759	
Guerrero	24,138	
Oaxaca	13,019	
Chiapas	18,981	
Gulf and Caribbean Coast	378,454	26.95
Tamaulipas	57,065	
Veracruz	151,756	
Tabasco	45,254	
Campeche	66,388	
Yucatán	48,644	
Quintana Roo	9,348	

continued on next page

CATCH BY REGION, 1995 (CONTINUED)

TONNES

	Live Weight	Percent of Catch
Non-Coastal States	40,996	2.92
Aguascalientes	1,062	
Coahuila	3,285	
Chihuahua	919	
Durango	4,196	
Guanajuato	6,901	
Hidalgo	3,615	
México	4,213	
Morelos	816	
Nuevo León	319	
Puebla	5,159	
Querétaro	594	
San Luis Potosí	1,839	
Tlaxcala	973	
Zacatecas	7,104	

Source: Secretaría del Medio Ambiente, Recursos Naturales y Pesca (Semarnap), Secretariat of Environment, Natural Resources and Fisheries.

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.

REGISTERED FLEETS FOR PRINCIPAL CATCHES, 1995

UNITS

	Total	High Seas Fleet					Coastal/ Inland Fleet
		Subtotal	Shrimp	Tuna	Anchovy Sardine/	Scalefish	
National total	74,903	3,262	2,235	96	81	850	71,641
Northern Pacific	18,246	1,554	1,244	74	81	155	16,692
Southern Pacific	20,208	243	219	0	0	24	19,965
Gulf and Caribbean	33,774	1,465	772	22	—	671	32,309
Inland states	2,675	—	—	—	—	—	2,675

Source: Secretaría del Medio Ambiente, Recursos Naturales y Pesca (Semarnap), Secretariat of Environment, Natural Resources and Fisheries.

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 mass-consumption products 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.

PROCESSING WEIGHTS BY REGION, 1995

TONNES

	North Pacific Coast	Central and South Pacific coasts	Gulf and Caribbean coasts	Inland states	Total
Live Catch	720,920	142,499	360,192	40,945	1,264,556
Total Processed					
Live Weight	616,103	41,626	70,623	102	728,454
Net Weight	247,126	24,833	44,749	51	316,759
Frozen					
Live Weight	151,426	26,972	61,756	0	240,154
Net Weight	103,124	17,935	43,258	0	164,317
Canned					
Live Weight	125,297	9,573	7,732	0	142,602
Net Weight	72,494	5,171	1,072	0	78,737
Dehydrated, Cooked or Shredded					
Live Weight*	335,081	4,709	321	0	340,111
Net Weight	70,338	1,500	77	0	71,915
Other Processes					
Live Weight	4,299	372	814	102	5,587
Net Weight	1,170	227	342	51	1,790

* includes 66,973 tonnes of waste, stemming from freezing and canning processes

Source: Secretaría del Medio Ambiente, Recursos Naturales y Pesca (Semarnap), Secretariat of Environment, Natural Resources and Fisheries.

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 with 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 *Cámara Nacional de la Industria Pesquera (Canainpes)*, National Fishing Industry Association, is more concerned with short-run threats to the industry. *Cámara* members tend to be the larger operators and a very large proportion of them are engaged in shrimp fishing, which is subject to many new regulations and health standards.

The *Canainpes* action plan for 1995 to 1996 stresses the need to negotiate implementation of fisheries management regulations with the government. It is also concerned with the embargo of Mexican tuna, as well as a threatened boycott of shrimp from the Gulf of Mexico. It has recognized the need to reduce dolphin mortality in the tuna fishery and to protect the habitat of the marine turtle.

Cámara officials are also concerned about fee increases and operational problems associated with the integrated port administrations. Planned increases in the price of diesel fuel by *Petróleos Mexicanos (Pemex)*, the national oil company, are also seen as a serious threat.

The modernization of Mexico's fisheries will require considerable inputs of foreign equipment and services. Government plans to promote the growth of aquaculture and mariculture will also create ongoing demand for specialized equipment and services. Observers point to several specific needs:

- technology for tracking and recording fish populations;
- development of fisheries regulation and management models;
- maintenance services for existing fishing infrastructure;
- technologies for coastal lagoon ecosystem rehabilitation; and
- systems for aquaculture and mariculture.

THE ROLE OF FOREIGN TRADE

Imports of fish and seafood products fell by 61 percent in 1995 as a result of the devaluation of the Mexican peso. The market is gradually bouncing back as the recovery takes hold.

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. Mexico's export markets are heavily oriented towards shrimp and tuna, which make up more than 70 percent of this market. In 1995, about 88 percent by value of Mexico's exports went to the United States. Other important markets were Japan, South Korea, Singapore, Costa Rica and Spain.

Imports were sharply curtailed as a result of the December 1994 devaluation, which roughly doubled the cost of imports. Total fish and seafood imports fell by 61 percent from US \$101.6 million 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.

Other countries with a significant share of the Mexican import market include Norway and Chile, both of which are major exporters of smoked salmon, which is very popular in Mexico. Canada has not yet made major inroads in this market. Smoked salmon from Canada totalled US \$45,000 out of a total import market US \$3 million in 1994. Mexican imports of smoked salmon plummeted by 73 percent in 1995, and Canadian sales fell to less than US \$10,000.

Seafood imports increased in the second half of 1996 as Mexico's economic recovery took hold. Imported products are also slowly regaining competitiveness, as high rates of domestic inflation, about 27 percent in 1996, work their way through the cost structures of Mexican producers.

FISH AND SEA PRODUCT IMPORTS, 1994 TO 1995

US \$ THOUSANDS

	World		Canada	
	1994	1995	1994	1995
Fresh, chilled, frozen, smoked, dried or salted	47,961	22,479	4,075	3,450
Fresh or chilled fish excluding fillets and meat	5,744	1,928	1,526	1,255
Frozen fish, excluding fillets and meat	6,763	4,637	12	58
Fresh or frozen fish fillets and meat	6,211	2,822	226	19
Smoked, dried or salted fish	13,163	6,871	1,921	2,001
Crustaceans	7,257	3,368	387	106
Mollusks	8,823	2,853	3	11
Prepared or preserved	50,734	15,962	5,061	937
Extracts and juices of fish, crustaceans, mollusks	148	95	1	0
Prepared or preserved fish, caviar etc.	30,458	8,539	4,985	933
Crustaceans, mollusks and other aquatic invertebrates	20,128	7,328	75	4
Grand total	98,695	38,441	9,136	4,387

Source: Banco Nacional de Comercio Exterior (Bancomext), Mexican Foreign Trade Commission.

AQUACULTURE

Aquaculture accounted for only about 11 percent of Mexico's seafood catch in 1995, but ambitious government development plans, combined with foreign investments, are expected to yield results over the next few years.

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 *Ley de Pesca*, Fishery Law, 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 large-scale 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.

Recent investments have created a small but growing industrial aquaculture sector based on ocean resources. Abalone, oysters, crab, squid and shrimp are growing in importance, notwithstanding the Gulf Coast cholera epidemic in 1991 to 1992 which severely cut oyster production. About 29 percent of all aquaculture production now consists of oysters and shrimp. 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 Acuacultura 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. They include Tamaulipas, Veracruz, Baja California Sur, Sinaloa, Nayarit, Oaxaca and Chiapas.

Four types of aquaculture are being developed under separate programs:

- *Commercial aquaculture projects* are those with substantial export potential for high-value products. This includes shrimp, oyster and abalone in coastal areas and trout in freshwater operations. The government has created 9 aquaculture parks, similar to industrial parks, that provide infrastructure and other supports to commercial operations.
- *Rural aquaculture projects* are those designed to provide income and nutrition in the poorer regions of the country. The project is providing technical and financial assistance, including matching communities with investors.
- *Repopulation projects* are designed to repair the damage done by overfishing and environmental degradation. Depleted species will be replenished by stocking and environmental improvements. These efforts aim to improve the viability of certain fisheries, especially those which native populations depend upon.
- *Species management projects* are designed to protect endangered species for environmental rather than commercial reasons. An example includes a project to save the sea tortoise from extinction. Turtle eggs will be collected on the beaches of Tamaulipas, incubated and raised for up to one year, and then returned to the ocean.

The ultimate objective of the *Desarrollo de 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. Most of the new technology in this sector has been provided by firms from Florida, Texas and California.

AQUACULTURE PRODUCTION, 1995

TONNES

	National		Total	Aquaculture	Percentage
	Registered	Unregistered			
Total	1,194,425	216,330	1,410,755	157,574	11.17
Oysters	31,892	367	32,259	30,486	94.50
Carp	27,506	2,900	30,406	25,882	85.12
Mojarra	90,972	2,304	93,276	76,128	81.62
Bass	1,235	127	1,362	962	70.63
Catfish	5,086	504	5,590	2,710	48.48
Charal	5,659	16	5,675	2,398	42.26
Trout	6,808	153	6,961	2,659	38.20
Shrimp	85,901	n/a	85,901	15,867	18.47
Prawn	4,379	n/a	4,379	72	1.64
Others	934,987	209,959	1,144,946	410	0.04

Source: Secretaría del Medio Ambiente, Recursos Naturales y Pesca (Semarnap), Secretariat of Environment, Natural Resources and Fisheries.

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.

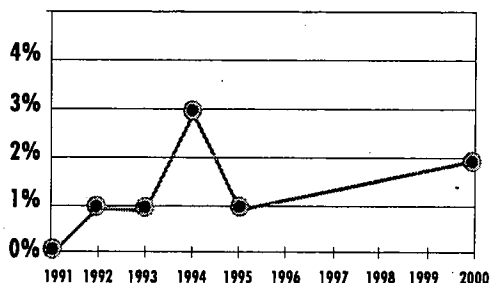
MEXICAN MARKET FOR SEAFOOD, 1991 TO 1995 AND PROJECTED TO 2000

'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
Consumption						
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
Total consumption	1,454	1,246	1,191	1,260	1,404	1,515

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.

IMPORTS AS A PERCENTAGE OF CONSUMPTION



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.

CONSUMERS

Imported fish appeals mainly to more affluent Mexicans, perhaps the top 20 percent of the income distribution. According to data published by the Mexican consulting firm *SIGMA Consultores*, households with an annual income of US \$9,680 in 1996 comprise just over one-fifth of the national population. These consumers reside almost entirely in the major cities. Middle and upper income households include almost 30 percent of the populations of Mexico City, Guadalajara and Monterrey. Those three cities include one-third of all Mexicans in those income groups, creating a market of about 7.5 million people who can afford imported food products. Other relatively affluent cities with a population of one million or more include Toluca, Puebla, León and Torreón.

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 and to 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 Sahaayo*, *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.

Merchants at *La Nueva Viga* and other major markets usually learn of new or foreign products through personal visits from the supplier. Catalogues and promotional literature are used to a much lesser degree. Many merchants deal with intermediaries who make it their business to stay aware of new products. These dealers visit trade fairs and follow up on ads in sector publications such as *Notimar*, which is published twice yearly, and the weekly publication of the *Cámara Nacional de la Industria Pesquera (Canainpes)*, National Fishing Industry Association.

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

Canadian products compete effectively in the high-quality medium-price market points against both Mexican and third-country alternatives.

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.

The government has privatized most of its former holdings in the fish distribution business. In late 1996 it was still trying to sell Ocean Garden, a major seafood distribution operation. This was the third time that Ocean Garden was put up for sale; the first two rounds of bidding did not produce an offer that was satisfactory to the government. The *Cámara Nacional de la Industria Pesquera (Canainpes)*, National Fishing Industry Association, has acted to bring together a consortium of Mexican companies to bid on this sale. Ocean Garden is a major exporter of Mexican seafood products. In particular, it exports shrimp, lobster and abalone to Japan and Korea, and it is working with the Japanese to develop new products for that market through aquaculture. There is concern that if the company falls into foreign hands, Mexican exports may suffer.

TRENDS AND OPPORTUNITIES

Product exports are limited mainly to niche markets, some of which are considered saturated, but there are interesting opportunities for the export of Canadian technology through joint ventures.

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.

The largest consumption levels are in central Mexico including the Federal District, Cuernavaca, Puebla, Toluca and Querétaro. This includes processed fish, however, and the largest consumption of fresh fish is on the coasts. The government has been working with the industry to develop promotion programs to increase domestic consumption.

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.

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.

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.

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.

PROTECTION OF MARINE LIFE

Mexico has ambitious programs aimed at protecting certain endangered species, the most important being dolphin and sea turtles. These programs have been fostered by consumer boycotts and a ban on the import of Mexican tuna into the United States.

The United States suspended tuna imports from Mexico and ten other countries in 1991 when it passed the Mammal Protection Law. This was in response to complaints from environmentalist organizations that certain Pacific Rim countries were not taking adequate precautions to reduce dolphin mortality. In particular, it was claimed at the time that Mexico's tuna fishery had one of the world's worst records of dolphin mortality. A General Agreement on Tariffs and Trade (GATT) panel ruled that it was an unfair trade practice for the US to apply its own environmental standards to another country. But the issue has been complicated by the negotiation of the North American Free Trade Agreement (NAFTA) and suits against the American government by environmental groups.

The Mexican viewpoint on this issue is that dolphin mortality in Mexico has been reduced to world levels and that the continued embargo amounts to a non-tariff trade barrier. Fishing industry experts say that Mexican tuna exports have fallen by US \$150 million per year as a result of the boycott, at the cost of about 30,000 jobs.

According to the Inter-American Tropical Tuna Commission, dolphin mortality has dropped 96 percent over the past ten years. International environmental groups, including Greenpeace, are now advocating the removal of the ban, which also applies to Venezuela, Colombia, Costa Rica, Ecuador and Panama, as well as five other countries. A bill which was to have lifted the embargo failed to pass the US Senate before Congress adjourned for the year in September 1996. Opponents of the bill expressed concern that the affected countries would return to previous practices, putting the American tuna fleet at a competitive disadvantage.

A related issue is consumer boycotts of Mexican shrimp in the US because of incidental turtle capture by the shrimp fishery. Again, Mexico claims to have remedied the problem, but the boycott continues. Environmentalists in the US say that their concerns are related to Mexico's alleged over-exploitation of various species, and not just the specific issues of dolphin and turtle mortality.

Depletion of fish stocks has also been an issue in the sport fishing sector, which has long been a major tourist attraction. In particular, billfish populations in the Baja California area have been falling.

Another environmentally sensitive fishery is located in the state of Quintana Roo, near the border with Belize, where the Great Maya Reef is located. The reef has been damaged by pressure from tourism, fishing and pollution, and it has been studied by scientists from around the world. This has created conflict with local fishing cooperatives. New regulations prohibiting fishing for lobster with hooks have been particularly controversial.

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.

THE NATIONAL FISHERIES INSTITUTE

The *Instituto Nacional de la Pesca (INP)*, National Fisheries Institute, is a government agency charged with the responsibility for research into the efficient exploitation of Mexico's live marine resources. The *INP* has carried out advanced studies of biological characteristics of the main species with a view to estimating their maximum sustained yield. The *INP* has 17 research centres in Mexico, the majority of them along the northern Pacific Coast. The nation also has several research ships.

The Government of Mexico is anxious to foster technological exchanges with other countries, regarding both scientific and commercial issues. Mexico is a signatory to the International Code of Conduct for Responsible Fishing, signed in Cancún in 1992.

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

The Mexican government closely regulates fishing catches and practices, and also has strict health and sanitary regulations affecting imported seafood.

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, regulates 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.

Mexico has been working to bring its internal standards in line with international norms. The *Secretaría del Medio Ambiente, Recursos Naturales y Pesca (Semarnap)*, Secretariat of Environment, Natural Resources and Fisheries, is responsible for the administration of the *Ley de Pesca y su Reglamento*. A large number of new regulations have been implemented, especially in the shrimp fishery. This has caused considerable concern by the *Cámara Nacional de la Industria Pesquera (Canainpes)*, National Fishing Industry Association, which is concerned that the new regulations are based too heavily on science and do not take sufficient account of the economic situation of the industry. Nonetheless, there is serious concern about overfishing in Mexico and tighter regulation is expected to proceed.

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.

New certificates must be obtained for each lot, although previous requirements for prior import permits have been eliminated under the North American Free Trade Agreement (NAFTA). In general, the importer must demonstrate that the product is fit for human consumption and complies with all health regulations. Usually, it is sufficient to demonstrate that the product is approved for human consumption in Canada. Certificates of Origin and Hygiene, and Certificates of Inspection that are issued by Fisheries and Oceans Canada are accepted by the Mexican authorities. They do not normally have to be legalized. Exporters should consult with their agent or importer in Mexico well in advance of shipment to ensure that all Mexican regulations have been complied with. Seemingly minor errors in paperwork may be treated as deliberate falsifications by Mexican authorities, leading to serious delays.

Additional regulations govern the operation of ports and navigable waters. Mexico is a signatory to more than a dozen international treaties and agreements affecting the oceans. Most observers do not consider these to have a significant market impact because they tend to specify principles rather than actions.

UNITED NATIONS EEZ AGREEMENT

Since 1978, limits to territorial claims over the ocean have been recognized by all member countries of the United Nations. The final stage of this process took place on 10 December 1982, with the formal signing of UNCLOS III. Part V of this agreement defines an exclusive economic zone (EEZ) as extending up to 200 nautical miles from the base lines of a coastal state's territorial sea.

In Mexico's case, this increased its ocean resources to about three million square kilometres, which includes the entire Continental Shelf. Since Mexico claims Guadalupe Island and the Revillagigedo Islands, its EEZ reaches more than 400 nautical miles from the mainland in some places.

Article 56 of the UN agreement recognizes "sovereign rights" over the EEZ "for the purpose of exploring and exploiting, conserving and managing the natural resources, whether living or non-living, of the waters superjacent to the sea-bed... and with regard to other activities for the economic exploitation and exploration of the zone."

The rights to an EEZ are balanced by a number of duties set out in the agreement. For example, the coastal state must take steps to preserve living species and manage harvesting for "maximum sustainable yield" based on scientific evidence. The agreement assigns "jurisdiction" over the protection and preservation of the marine environment, to the coastal state. The state must also maintain charts and geographic data adequate to identify the limits of its EEZ.

These requirements, however, are not accompanied by any specific standards. Article 61 simply requires coastal states to cooperate with "competent international organizations" and to "take into account" generally accepted international standards.

MARKET ENTRY STRATEGIES

Establishing brand recognition in the Mexican market can take time. A visible presence in the market is essential to establish credibility with both distributors and consumers.

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 Capy 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 Mexicans are also 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.

For example, executives of *Brunswick de México* said in interviews that they considered that a local office was essential for the intensive sales effort they had planned when they entered the market in 1992. They rely heavily on their Mexican office to clear away regulatory hurdles and present the product to the Mexican market in its best possible light. A substantial local organization was also needed to get the product into supermarkets on a national scale.

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.

WHERE TO GET HELP

CANADIAN GOVERNMENT DEPARTMENTS AND SERVICES IN CANADA

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

Tel.: 1-800-267-8376 or (613) 944-4000

Fax: (613) 996-9709

FaxLink:* (613) 944-4500

InfoCentre Bulletin Board (IBB):

Tel.: 1-800-628-1581 or (613) 944-1581

Internet: <http://www.dfait-maeci.gc.ca>

*FaxLink is a faxback system which provides summaries on a range of Mexican markets. It must be contacted through your fax machine. Dial from your fax phone and follow the voice prompt instructions.

The Mexico Division, Latin America and Caribbean Bureau promotes trade with Mexico. There are several trade commissioners at the Embassy of Canada in Mexico City, as well as in the satellite offices in Monterrey and Guadalajara. Trade commissioners can provide a range of services including introducing Canadian companies to potential customers in Mexico, advising on marketing channels, assisting those wishing to participate in trade fairs, helping to identify suitable Mexican firms to act as agents, and compiling strategic business intelligence on potential foreign customers.

Latin America and Caribbean Bureau — Mexico Division (LMR)

Department of Foreign Affairs and International Trade
Lester B. Pearson Building

125 Sussex Drive

Ottawa, ON K1A 0G2

Tel.: (613) 996-5547

Fax: (613) 996-6142

INTERNATIONAL TRADE CENTRES (ITCs)

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:

Newfoundland

International Trade Centre
P.O. Box 8950
Atlantic Place
215 Water Street
Suite 504
St. John's, NF A1B 3R9
Tel.: (709) 772-5511
Fax: (709) 772-2373

Prince Edward Island

International Trade Centre
P.O. Box 1115
Confederation Court Mall
134 Kent Street
Suite 400
Charlottetown, PE C1A 7M8
Tel.: (902) 566-7443
Fax: (902) 566-7450

Nova Scotia

International Trade Centre
P.O. Box 940, Station M
1801 Hollis Street
Fifth Floor
Halifax, NS B3J 2V9
Tel.: (902) 426-7540
Fax: (902) 426-2624

New Brunswick

International Trade Centre
P.O. Box 1210
1045 Main Street
Unit 103
Moncton, NB E1C 1H1
Tel.: (506) 851-6452
Fax: (506) 851-6429

Quebec International Trade Centre
5 Place Ville-Marie
Suite 800
Montreal, PQ H3B 2G2
Tel.: (514) 283-6328
Fax: (514) 283-8794

Ontario International Trade Centre
Dominion Public Building
1 Front St. West
Fourth Floor
Toronto, ON M5J 1A4
Tel.: (416) 973-5053
Fax: (416) 973-8161

Manitoba International Trade Centre
P.O. Box 981
400 St. Mary Avenue
Fourth Floor
Winnipeg, MB R3C 4K5
Tel.: (204) 983-5851
Fax: (204) 983-3182

Saskatchewan International Trade Centre
The S.J. Cohen Building
119-4th Avenue South
Suite 401
Saskatoon, SK S7K 5X2
Tel.: (306) 975-5315
Fax: (306) 975-5334

International Trade Centre
1919 Saskatchewan Drive
Sixth Floor
Regina, SK S4P 3V7
Tel.: (306) 780-6124
Fax: (306) 780-6679

Alberta
**Edmonton office is
also responsible for
Northwest Territories*

International Trade Centre
Canada Place
9700 Jasper Avenue
Room 540
Edmonton, AB T5J 4C3
Tel.: (403) 495-2944
Fax: (403) 495-4507

International Trade Centre
510-5th Street S.W.
Suite 1100
Calgary, AB T2P 3S2
Tel.: (403) 292-6660
Fax: (403) 292-4578

British Columbia International Trade Centre
P.O. Box 11610
**Vancouver office is also
responsible for the Yukon* 300 West Georgia Street
Suite 2000
Vancouver, BC V6B 6E1
Tel.: (604) 666-0434
Fax: (604) 666-0954

WORLD INFORMATION NETWORK FOR EXPORTS (WIN 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. Funded activities include:

- Market Development Strategies, which consist of a package of support for visits, trade fairs, and market support initiatives, under one umbrella of the company's marketing plan.
- New to Exporting Companies, which provides a vehicle for these companies to seek out individual export opportunities, either through a market identification visit or participation in an international trade fair.
- Capital Projects Bidding for specific projects outside Canada involving international competition/formal bidding procedures.
- Trade Association Activities undertaken by non-sales national trade or industry associations on behalf of their member companies.

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), listed separately below.

INTERNATIONAL FINANCING

DFAIT helps Canadian exporters interested in pursuing multilateral business opportunities financed by international financing institutions (IFIs). Canadian exporters and trade associations can access market data, obtain a better understanding of the competition, and determine if an IFI-funded market opportunity is practical and worth pursuing. DFAIT can provide information and advice on the availability of Canadian government-funded assistance programs and can assist companies in developing effective export marketing. For further information, contact:

International Financing Division

Department of Foreign Affairs and International Trade
Lester B. Pearson Building
125 Sussex Drive
Ottawa, ON K1A 0G2
Tel.: (613) 944-0910
Fax: (613) 943-1100

TECHNOLOGY INFLOW PROGRAM (TIP)

Managed by DFAIT and delivered domestically by the Industrial Research Assistance Program, National Research Council, TIP is designed to help Canadian companies locate, acquire and adopt foreign technologies by promoting international collaboration. Industry Canada (IC) also helps in program promotion. TIP officers respond to requests to identify technology sources and opportunities for cooperation between Canadian and foreign firms. The Program also helps Canadian firms make exploratory visits abroad to identify and gain first-hand knowledge of relevant foreign technologies, as well as how to negotiate to acquire them. For information, call (613) 993-5326.

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

INDUSTRY CANADA (IC)

IC was created with a broad mandate to make Canada more competitive by fostering the growth of Canadian businesses, by promoting a fair and efficient marketplace for business and consumers, and by encouraging commercial ventures in scientific research and technology. In the area of small business, it has been given specific responsibility to:

- develop, implement and promote national policies to foster the international competitiveness of industry; the enhancement of industrial, scientific and technological development; and the improvement in both the productivity and efficiency of industry;
- promote the mobility of goods, services, and factors of production within Canada;
- develop and implement national policies to foster entrepreneurship and the start-up, growth and expansion of small businesses;
- develop and implement national policies and programs respecting industrial benefits from procurement of goods and services by the Government of Canada; and
- promote and provide support services for the marketing of Canadian goods, services and technology.

The regional offices of IC work directly with Canadian companies to promote industrial, scientific and technological development. They help clients recognize opportunities in a competitive international marketplace by providing services in the areas of business intelligence and information as well as trade and market development. IC also promotes and manages a portfolio of programs and services.

The following are areas in which IC regional offices have special competence:

- access to trade and technology intelligence and expertise;
- entry points to national and international networks;
- industry-sector knowledge base;
- co-location with International Trade Centres connected to DFAIT and Canadian posts abroad;
- client focus on emerging and threshold firms; and
- business intelligence.

Business Service Centre

Industry Canada
235 Queen Street
First Floor, East Tower
Ottawa, ON K1A 0H5
Tel.: (613) 941-0222
Fax: (613) 957-7942

NAFTA Information Desk

Industry Canada
235 Queen Street
Fifth Floor, East Tower
Ottawa, ON K1A 0H5
Fax: (613) 952-0540

STRATEGIS

Canada's largest business web site, Strategis, gives business direct access to the latest information on specific industries, export opportunities, company capabilities, international intelligence and business contacts via the Internet. It also includes information on new technologies and processes, management experts, market services, government programs, micro-economic research and much more. In addition to these information resources, Strategis provides businesses with easy access to Industry Canada experts. Canadian companies will be able to browse the site to find out about market opportunities in Canada and abroad, new state-of-the-art technologies, key alliances, training resources and government programs. The International Business Information Network, one section of the site, contains first-hand information on products in demand, market conditions, competitors and business opportunities abroad.

Strategis

Industry Canada
235 Queen Street
Ottawa, ON K1A 0H5
Tel.: (613) 954-5031
Fax: (613) 954-1894

Internet : <http://www.hotline.service@strategis.ic.gc.ca/>

REVENUE CANADA

Revenue Canada, Trade Administration Branch provides service and information on NAFTA regulations in English, French and Spanish. Revenue Canada publications and customs notices are also available by calling or faxing the NAFTA Information Desk.

NAFTA Information Desk

Revenue Canada, Trade Administration Branch
555 Mackenzie Avenue
First Floor
Ottawa, ON K1A 0L5
Tel.: 1-800-661-6121, or (613) 941-0965
Fax: (613) 952-0022

CANADIAN INTERNATIONAL DEVELOPMENT AGENCY (CIDA)

An important possible source of financing for Canadian ventures in Mexico is the special fund 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. INC supports the development of linkages with the private

sector in Mexico by encouraging Canadian enterprises to share their skills and experiences with partners in Mexico and other countries. A series of INC mechanisms help enterprises to establish mutually beneficial collaborative arrangements for the transfer of technology and the creation of employment in Mexico.

There are five INC mechanisms that help eligible Canadian firms to conduct studies and that provide professional guidance and advice to potential clients. Where a project involves environmental improvement, technology transfer, developmental assistance to women, job training or job creation, early contact with CIDA's Industrial Cooperation Division is suggested. An important CIDA criterion is that the project creates jobs in Mexico without threatening jobs in Canada. In fact, most CIDA-assisted projects have produced net increases in Canadian jobs. For more information, contact:

Industrial Cooperation Division

Canadian International Development Agency
200 Promenade du Portage
Hull, PQ K1A 0G4
Tel.: (819) 997-7905
Fax: (819) 953-5024

ATLANTIC CANADA OPPORTUNITIES AGENCY (ACOA)

Atlantic Canadian companies seeking to develop exports to Mexico may be eligible for assistance from the ACOA. The Agency works in partnership with entrepreneurs from the Atlantic region to promote self-sustaining economic activity in Atlantic Canada.

ACOA provides support to businesses as they look to expand existing markets through the development of marketing plans. Efforts include monitoring trade opportunities arising from global economic change, communications efforts to promote the region, trade missions and associated activities, as well as better coordination with federal and provincial bodies that influence trade and investment opportunities. For more information, contact:

Atlantic Canada Opportunities Agency

Blue Cross Centre
644 Main Street
P.O. Box 6051
Moncton, NB E1C 9J8
Tel.: 1-800-561-7862
Fax: (506) 851-7403

THE FEDERAL OFFICE OF REGIONAL DEVELOPMENT (QUEBEC), (FORD Q)

FORD Q is a federal regional economic development organization. Through its commitment to provide services tailored to its clients, FORD Q supports the development of the economic potential of all regions of Quebec and the creation of viable jobs by promoting a business climate in which small- and medium-sized enterprises (SMEs) can grow and prosper. FORD Q uses the relevant and sought-after expertise of the federal government to work with the entrepreneurial spirit of Quebecers in every region and improve their competitive position. It also seeks, through strategic activities and partnerships in the community, to improve the business climate, an essential factor in the growth of SMEs.

FORD Q provides one-stop access to federal services and programs aimed at SMEs, particularly with regard to innovation, research and development (R&D), design, market development and entrepreneurship. Through its 13 Small Business Access Centres, FORD Q provides access to Team Canada export services and programs in the areas of awareness, export preparation, information, networking, advice and counselling, funding and access to funding.

In terms of access to funding, PEMD, with the exception of the component on preparing projects for submission, is delivered through the Small Business Access Centres. IDEA-SME, a FORD Q program, can also support firms during the export process. In addition, through alliances with banks, Small Business Access Centre advisors can facilitate access to funding for foreign marketing strategy projects.

Small Business Access Centre

Abitibi/Témiscamingue
906 5th Avenue
Val d'Or, PQ J9P 1B9
Tel.: (819) 825-5260
Fax: (819) 825-3245

Small Business Access Centre

Bas Saint-Laurent/Gaspésie/Îles-de-la-Madeleine
212 Belzile Street
Suite 200
Rimouski, PQ G5L 3C3
Tel.: (418) 722-3282
Fax: (418) 722-3285

Small Business Access Centre

Bois-Francis
Place du Centre
150 Marchand Street
Suite 502
Drummondville, PQ J2C 4N1
Tel.: (819) 478-4664
Fax: (819) 478-4666

Small Business Access Centre

Côte-Nord
701 Laure Boulevard
Suite 202B
P.O. Box 698
Sept-Îles, PQ G4R 4K9
Tel.: (418) 968-3426
Fax: (418) 968-0806

Small Business Access Centre

Estric
1335 King Street West
Suite 303
Sherbrooke, PQ J1J 2B8
Tel.: (819) 564-5904
Fax: (819) 564-5912

Small Business Access Centre

Île de Montréal
800 Place Victoria Tower
Suite 3800
P.O. Box 247
Montreal, PQ H4Z 1E8
Tel.: (514) 283-2500
Fax: (514) 496-8310

Small Business Access Centre

Laval/Laurentides/Lanaudière
Tour du Triomphe II
2540 Daniel-Johnson Boulevard
Suite 204
Laval, PQ H7T 2S3
Tel.: (514) 973-6844
Fax: (514) 973-6851

Small Business Access Centre

Mauricie
Immeuble Bourg du Fleuve
25 des Forges Street
Suite 413
Trois-Rivières, PQ G9A 2G4
Tel.: (819) 371-5182
Fax: (819) 371-5186

Small Business Access Centre

Montérégie
Complexe Saint-Charles
1111 Saint-Charles Street West
Suite 411
Longueuil, PQ J4K 5G4
Tel.: (514) 928-4088
Fax: (514) 928-4097

Small Business Access Centre

Nord-du-Québec
800 Place Victoria Tower
Suite 3800
P.O. Box 247
Montreal, PQ H4Z 1E8
Tel.: (514) 283-5174
Fax: (514) 283-3637

Small Business Access Centre

Outaouais
259 Saint-Joseph Boulevard
Suite 202
Hull PQ J8Y 6T1
Tel.: (819) 994-7442
Fax: (819) 994-7846

Small Business Access Centre

Quebec City/Chaudière/Appalaches
905 Dufferin Avenue
Second Floor
Quebec City, PQ G1R 5M6
Tel.: (418) 648-4826
Fax: (418) 648-7291

Small Business Access Centre

Saguenay/Lac-Saint-Jean
170 Saint-Joseph Street South
Suite 203
Alma, PQ G8B 3E8
Tel.: (418) 668-3084
Fax: (418) 668-7584

WESTERN ECONOMIC DIVERSIFICATION CANADA (WD)

WD is responsible for federal economic development activities in Western Canada. The Department works in partnership with the western provinces, business, industry associations and communities to stimulate the western Canadian economy.

WD's "New Directions" program will work to enhance the export position of western companies by boosting their competitiveness in domestic and global markets.

The Department no longer provides repayable loans to individual companies, but seeks new innovative partnerships within both the public and private sectors. These partnerships will address the needs of small- and medium-sized enterprises for information, business services and capital, particularly for high growth industries critical to Western Canada's economic diversification.

One of WD's new products focused on export development is the International Trade Personnel Program. This federal-provincial initiative links export-focused western firms with recent post-secondary graduates. The program accomplishes two important socio-economic goals: it gives companies the extra person-power they need to penetrate new markets, and it gives recent graduates valuable work experience. Under the new program, the length of export-development projects may vary from one to three years. Approved projects will be eligible for assistance ranging from C \$7,500 for one year, to a maximum of C \$37,500 per graduate over the three-year period. For more information, contact:

Western Economic Diversification Canada

The Cargill Building
240 Graham Avenue
Suite 712
P.O. Box 777
Winnipeg, MB R3C 2L4
Tel.: (204) 983-4472
Fax: (204) 983-4694

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's products fall into four main categories:

- export credit insurance, covering short- and medium-term credits;
- performance-related guarantees and insurance, providing cover for exporters and financial institutions against calls on various performance bonds and obligations normally issued either by banks or surety companies;
- foreign investment insurance, providing political risk protection for Canadian investments abroad; and
- export financing, providing medium- and long-term export financing to foreign buyers of Canadian goods and services.

EDC has established relationships with leading commercial and public sector institutions in Mexico and Latin America. For more information on the range of services available, please refer to the customer teams below.

Base and Semi-Manufactured Goods Team:

Tel.: (613) 598-2823

Fax: (613) 598-2525

Consumer Goods Team:

Tel.: (613) 597-8501

Fax: (613) 598-2525

Emerging Exporters Team:

Tel.: 1-800-850-9626

Fax: (613) 598-6871

Financial Institutions Team:

Tel.: (613) 598-6639

Fax: (613) 598-3065

Forestry Team:

Tel.: (613) 598-2936

Fax: (613) 598-2525

Engineering and Professional Team:

Tel.: (613) 598-3162

Fax: (613) 598-3167

Industrial Equipment Team:

Tel.: (613) 598-3163

Fax: (613) 597-8503

Information Technologies Team:

Tel.: (613) 598-6891

Fax: (613) 598-6858

Transportation Team:

Tel.: (613) 598-3164

Fax: (613) 598-2504

For information on the full range of EDC services, contact any of the following EDC offices:

Ottawa Export Development Corporation
151 O'Connor Street
Ottawa, ON K1A 1K3
Tel.: (613) 598-2500
Fax: (613) 598-6858

Vancouver Export Development Corporation
One Bentall Centre
505 Burrard Street
Suite 1030
Vancouver, BC V7X 1M5
Tel.: (604) 666-6234
Fax: (604) 666-7550

Calgary Export Development Corporation
510-5th Street S.W.
Suite 1030
Calgary, AB T2P 3S2
Tel.: (403) 292-6898
Fax: (403) 292-6902

Winnipeg Export Development Corporation
330 Portage Avenue
Eighth Floor
Winnipeg, MB R3C 0C4
Tel.: (204) 983-5114
Fax: (204) 983-2187

Toronto Export Development Corporation
National Bank Building
150 York Street
Suite 810
P.O. Box 810
Toronto, ON M5H 3S5
Tel.: (416) 973-6211
Fax: (416) 862-1267

London Export Development Corporation
Talbot Centre
148 Fullarton Street
Suite 1512
London, ON N6A 5P3
Tel.: (519) 645-5828
Fax: (519) 645-5580

Montreal Export Development Corporation
Tour de la Bourse
800 Victoria Square
Suite 4520
P.O. Box 124
Montreal, PQ H4Z 1C3
Tel.: (514) 283-3013
Fax: (514) 878-9891

Halifax Export Development Corporation
Purdy's Wharf, Tower 2
1969 Upper Water Street
Suite 1410
Halifax, NS B3J 3R7
Tel.: (902) 429-0426
Fax: (902) 423-0881

NATIONAL RESEARCH COUNCIL (NRC)

Canadian companies hoping to succeed in the Mexican marketplace may require additional technology to improve their competitiveness. The NRC works with Canadian firms of all sizes to develop and apply technology for economic benefit. The Council manages the Industrial Research Assistance Program (IRAP), a national network for the diffusion and transfer of technology.

The IRAP network, working primarily with small- and medium-sized Canadian firms, supports the process of developing, accessing, acquiring, implementing and using technology throughout Canadian industry. IRAP has a 50-year history of providing technical advice and assistance to Canadian firms and has acquired a reputation as one of the most flexible and effective federal programs. IRAP takes advantage of the advice of industrial technology advisors

who are situated in more than 165 different locations within approximately 90 communities across Canada, including numerous provincial technology centres, the NRC's own laboratories and research institutes, federal government departments, and technology transfer offices in Canadian universities. For further information, contact:

Industrial Research Assistance Program

National Research Council

Montreal Road

Building M-55

Ottawa, ON K1A 0R6

Tel.: (613) 993-1790

Fax: (613) 952-1079

CANADIAN COMMERCIAL CORPORATION (CCC)

CCC, a Crown corporation, provides Canadian exporters with valuable assistance when they are selling to any foreign government, or to an international organization. In such sales, CCC acts as a prime contractor and guarantor for the sale of Canadian goods and services to the foreign customer.

CCC certifies the Canadian exporter's financial and technical capabilities, and guarantees to the foreign buyer that the terms and conditions of the contract will be met. CCC's participation in a sale provides Canadian suppliers with the tangible backing of their own government, enhancing their credibility and competitiveness in the eyes of foreign customers. This can often lead to the negotiation of more advantageous contract and payment terms.

The Progress Payment Program, developed by CCC in cooperation with Canada's financial institutions, makes pre-shipment export financing more accessible to small- and medium-sized exporters. The program allows an exporter to draw on a special line of credit, established by his or her principal banker for a particular export sale. In most instances, the borrowing costs will approximate those associated with a typical demand line of credit. The program is available for transactions with foreign government and private sector buyers.

For more information about CCC and its programs, contact:

Canadian Commercial Corporation

50 O'Connor Street

Eleventh Floor

Ottawa, ON K1A 0S6

Tel.: (613) 996-0034

Fax: (613) 995-2121

KEY CONTACTS IN CANADA

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 (CCA)

The Council is a non-profit organization formed in 1987 to promote business interests in Latin American as well as Caribbean countries. The CCA promotes events and programs targetted at expanding business and building networking contacts between Canada and the countries of the region.

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 Training Inc.

155 Queen Street

Suite 608

Ottawa, ON K1P 6L1

Tel.: (613) 230-3553

Fax: (613) 230-6808

Language Information Centre
240 Sparks Street RPO
Box 55011
Ottawa, ON K1P 1A1
Tel.: (613) 523-3510

Open Bidding Service
P.O. Box 22011
Ottawa, ON K1V 0W2
Tel.: 1-800-361-4637 or (613) 737-3374
Fax: (613) 737-3643

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 GOVERNMENT OFFICES IN CANADA

The Embassy of Mexico and Mexican consulates can provide assistance and guidance to Canadian companies in need of information about doing business in Mexico. For more information, contact:

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

Mexican Consulate in Ottawa
45 O'Connor Street
Suite 1500
Ottawa, ON K1P 1A4
Tel.: (613) 233-6665
Fax: (613) 235-9123

OTHER MEXICAN CONSULATES GENERAL IN CANADA

Consulate General of Mexico
2000 Mansfield Street
Suite 1015
Montreal, PQ H3A 2Z7
Tel.: (514) 288-2502/4916
Fax: (514) 288-8287

Consulate General of Mexico
199 Bay Street
Suite 4440
P.O. Box 266, Station Commerce Court West
Toronto, ON M5L 1E9
Tel.: (416) 368-2875/8141/1847
Fax: (416) 368-8342

Consulate General of Mexico
810-1130 West Pender Street
Vancouver, BC V6E 4A4
Tel.: (604) 684-3547/1859
Fax: (604) 684-2485

MEXICAN FOREIGN TRADE COMMISSIONS
Banco Nacional de Comercio Exterior (Bancomext) is the Mexican Foreign Trade Commission and has offices in Canada. It offers credits, export guarantees and counselling services to Mexican companies seeking to do business in Canada.

MEXICAN BANKS WITH OFFICES IN CANADA

Banco Nacional de México (Banamex), *Banca Serfin* and *Banca Confia* are private-sector banks which offer specialized services through their international trade information centres. The centres participate in a computerized communications network with access to numerous economic, governmental and financial databases throughout the world. These banks are located throughout Mexico and maintain offices in Toronto.

Banco Nacional de México (Banamex)
1 First Canadian Place
Suite 3430
P.O. Box 299
Toronto, ON M5X 1C9
Tel.: (416) 368-1399
Fax: (416) 367-2543

Banca Serfin
BCE Place
Canada Trust Tower
161 Bay Street
Suite 4360
P.O. Box 606
Toronto, ON M5J 2S1
Tel.: (416) 360-8900
Fax: (416) 360-1760

Banca Confia
150 York Street
Suite 408
Toronto, ON M5H 3A9
Tel.: (416) 955-9233
Fax: (416) 955-9227

CANADIAN GOVERNMENT DEPARTMENTS AND SERVICES IN MEXICO

TRADE AND ECONOMIC DIVISION

THE EMBASSY OF CANADA IN MEXICO

The Trade and Economic Division of the Canadian Embassy 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

KEY CONTACTS IN 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)

Dirección General 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)

Dirección General de Control Sanitario de Bienes y Servicios

Av. 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

Secretaría de la Defensa Nacional (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 Assessment 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
Col. 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 Vigia
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.
02300 México, D.F.
México
Tel.: (52-5) 587-1077/1583
Fax: (52-5) 368-1720/1751

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

Mar del Norte No. 5

Col. San Alvaro

02090 México, D.F.

México

Tel.: (52-5) 386-1368/1083

Fax: (52-5) 386-1952

HELP US TO SERVE YOU BETTER

We are interested in your views on this publication. Please take a few minutes to respond to the questions below.

1. What is your overall opinion of this publication?

- very useful
- useful
- moderately useful
- not useful

2. Please provide your assessment of each of the following aspects of this publication.

a) Quality of text discussion (mark one only):

- excellent
- good
- fair
- poor

b) Presentation of information (mark one only):

- excellent
- good
- fair
- poor

c) Use of graphics and other visual aids (mark one only):

- excellent
- good
- fair
- poor

3. If this publication were updated, revised and re-issued in the future, would you be interested in receiving a copy?

- yes, very interested
- probably interested
- no, not interested
- not sure

4. How did you find the structure and format of this publication?

- clear and easy to follow
- confusing and difficult to follow

5. For your purposes, did this publication provide a sufficiently complete treatment of the subject(s) reviewed?

- yes, definitely
- to some extent
- no
- can't say/don't know

6. This publication would have been more useful to me if it had (mark all that apply):

- provided more qualitative information
- provided less quantitative information
- made greater use of graphs, charts and tables
- contained a longer textual discussion
- contained a shorter textual discussion
- used more examples, case studies, company profiles

7. In your opinion, was there important information missing from this publication?

yes — please specify:

8. Are there any issues relevant to the subject of this publication that you would like to have seen covered in more detail?

9. Please offer any suggestions for improving the next version of this publication.

10. Will this publication assist you in your business development?

yes no

11. a) Does your company currently export?

- Yes, go to 11 b)
- No, go to 11 c)

b) If yes, to which foreign markets?

- U.S.A. Europe Japan
- Mexico Latin America
- Other (please specify) _____

c) If not, are you planning to export within the next 12 months?

- Yes, where?
- U.S.A. Europe Japan
- Mexico Latin America
- Other (please specify) _____

12. What is the approximate size of your company?

- under \$1 million
- \$1 to 5 million
- \$5 and \$10 million
- over \$10 million

To discuss this evaluation may we contact you? If so,

Name: _____

Company: _____

Address: _____


Tel.: _____ Fax: _____

Please return the completed survey by fax to (613) 996-6142 or to the address below:

Latin America and Caribbean Bureau
Department of Foreign Affairs and International Trade
Lester B. Pearson Bldg., 125 Sussex Drive
Ottawa, Ontario K1A 0G2

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