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Pannke, J. Antonio  
The Mexican lobster fishery, market  
and distribution system  
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**THE MEXICAN LOBSTER FISHERY,  
MARKET AND DISTRIBUTION SYSTEM**

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Dept. of External Affairs  
Min. des Affaires extérieures

AUG 12 1993  
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**NARRATIVE**

Mexico ranks eighth among the world's lobster-producing nations. Species of the Palinuridae, Nephropidae and Scyllaridae families of spiny lobsters may be found in Mexican waters. Of the seven Palinuridae species present, only four make up the principal lobster fishery: Panulirus interruptus (red lobster); Panulirus gracilis (green lobster); Panulirus inflatus (blue lobster) and Panulirus argus (Caribbean lobster).

Most of the lobsters are taken along the Peninsula of Baja California (from Ensenada to Bahía de Magdalena, Isla La Partida and Isla Espíritu Santo), and the Peninsula of Yucatán (Punta Holchit and the coastline of Quintana Roo). Potential exists to develop the lobster fishery along the coasts of Oaxaca and Chiapas. However, many studies are required to determine the exact potential of the resource and the number of fishermen that can be allowed to exploit it in that region.

The lobster fishery in Mexico is reserved to co-operatives. There are 90 fisheries co-operatives with a total membership of approximately 10,500 fishermen. However, not all of them are directly involved in catching lobsters; many of them are engaged in fishing for other marine species.

In order to manage and preserve this resource, the Secretariat of Fisheries via its National Fisheries Institute, has taken two regulatory measures (besides limiting the number of fishermen): a period each year when the catching of lobster is prohibited, and a minimum size that can legally be taken depending on the characteristics of each of the species being exploited. These measures are to allow more larva to be released by the female lobsters at spawning time, to give the resource a period of rest and to enable it to develop in size. The objective is to allow female lobsters to reach maturity and breed at least once in their lifetime, to have replacements for the females which are caught.

The prohibition periods and the minimum sizes allowed for each specie are:

<u>Lobster Species</u>	<u>Prohibition Period</u>	<u>Minimum Size</u>
Red	16 March - 30 Sept.	82.5 cephalothorax
Green & blue	1st. June - 15 Sept.	82.5 cephalothorax
Caribbean	1st. March - 30 June	14.5 abdominal

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The fisheries authorities in Mexico are having difficulty in maintaining the resource at its optimum levels of production. This is mainly caused by consumer preferences of both the domestic and international markets for smaller size lobsters. This situation conflicts with the regulatory criteria, especially in the lobster fishery along Mexico's Caribbean coastline. The preferred sizes are precisely those which have not yet reached the legal minimum stage of development. Sustained harvest in that area is seriously inhibited since individuals of those smaller sizes do not get to reproduce even once in their lifetime.

The number of fishermen dedicated to the lobster fishery in the Caribbean has increased disproportionately, but not so the reproduction of the lobster resource. This has serious implications for maintaining the future balance, as the indiscriminate catching of lobsters by fishermen who use modern aqualung diving techniques, tends to deplete the numbers of female lobsters before they can reproduce. The exclusive use of lobster traps could resolve this problem, but no regulation has yet been introduced regarding the equipment and/or fishing systems that are appropriate and approved for the catching of lobster.

### SUPPLY AND CONSUMPTION

The disposable volume of lobster in the domestic market in 1991 reached over 1,683 tonnes. This was an increase of 98.7%, compared to a decline of 2.7% the previous year. Per Capita consumption of lobster went from 11.13 kilograms in 1989 to 20.33 kilograms in 1991. Direct human consumption of lobster in 1991 is estimated at approximately 10.10 kilograms, while indirect human consumption reached 10.23 kilograms.

Lobster is distributed in the Mexican consumer market whole-boiled-frozen (67%), fresh-frozen tails (28%) and as lobster pulp (5%). Lobster is a high-priced food item, which is affordable and consumed regularly only by the upper middle class and the wealthy sectors of the population.

Of late, imported surimi products (imitation crab and lobster made from inexpensive white fish) have entered the market. They are sold over supermarket fish counters, fish stores and served mostly at Japanese restaurants. Being a new and cheaper product (the price of imported surimi is but a fraction of that for real lobster), Mexican housewives tend to be willing to try surimi for a time, but the novelty soon wears off. On the other hand, surimi consumption in specialty restaurants is on the increase, but this trend represents no serious threat to the traditional consumption of real product.



DOMESTIC PRODUCTION AND FOREIGN TRADE

Lobster production in Mexico in 1991 reached an estimated 2,621 tonnes, an increase of 38.8% above the tonnage caught the previous year, reflecting the intense exploitation currently taking place. In contrast, the production increase from 1989 to 1990 was only 2.4%.

Over 35% of the lobster catch was exported in 1991, amounting to 939,399 kilograms for a value of US\$15,107,327 dollars. However, higher export percentages were recorded in the previous years, when they reached 53.2% and 55.9% in 1989 and 1990, respectively. The principal markets for Mexico's lobster are the United States and Japan. Lobster sales have also been made to France and Spain.

The recorded imports of frozen rock lobster and other sea crayfish (*Palinurus*, spp., *Palunirus* spp. and/or *Jasus* spp.) totalled only 1,435 kilograms in 1991, compared to 16,254 kilograms a year earlier. The major supplier of these sea products is the United States.

There are major discrepancies between official Mexican statistics and Statistics Canada data, concerning Canadian lobster exports to Mexico. SECOFI import data for 1991 recorded only 322 kilograms of *Homarus Americanus* lobster valued at US\$4,074 dollars as originating in Canada. On the other hand, Statistics Canada indicated a total of 3,055 kilograms (rock lobster and other sea crayfish) valued at \$16,000 Canadian dollars exported to Mexico that year. One explanation for this is that products arriving at Mexico's northern border crossings are registered as entering from the United States.

DISTRIBUTION SYSTEMS

The New La Viga Fish Market in Metropolitan Mexico City is the largest and most modern in Latin America. It is the major distribution center for all fisheries products, including lobster and crayfish. "Central de Pescados y Mariscos La Nueva Viga" is a modern facility for wholesale and retail of fisheries products, and home of the National Society of Fish and Seafood Distributors.

Product is distributed from La Viga to other urban centers in the interior, where lesser facilities receive and distribute to consumer outlets. Frozen lobster (whole-boiled and tails) is available wholesale or retail at La Viga, or from a number of supermarket chain stores, and fisheries products retail markets. Leading gourmet restaurants and five star tourist hotels list lobster on their menus.





The lobster fishery is reserved to cooperative operations, as mentioned earlier. Product from these cooperatives is sold to intermediaries who bring the lobsters to distribution points located in the large urban centers such as Mexico City, Guadalajara, Monterrey, Acapulco, León, Tijuana, etc. These intermediaries and the wholesalers control the volume, price and quality of the product. An estimated 100,000 tonnes of fisheries products move through the La Viga fish market each year, and approximately 5% corresponds to crustaceans, including domestic crayfish and lobster.

### TARIFF AND STRUCTURE

As of 13 November, 1992 the importation into Mexico of crayfish and lobster does not require a permit from the Secretariat of Commerce and Industrial Development (SECOFI).

Under the Harmonised System, crustaceans are described according to the following: "Crustaceans, including those that are shelled, live, fresh, chilled, frozen, dried, salted or in brine; unshelled crustaceans, boiled in water or steamed, chilled, frozen, dry, salted or in brine; meal, flour or "pellets" of crustaceans, fit for human consumption."

<u>Class. No.</u>	<u>Product Description</u>	<u>AD VALOREM</u>
	<b>Frozen Product:</b>	
0306.11.01	Lobsters (Palinurus, Palunirus and Jasus species)	20%
0306.12.01	Lobsters (Homarus species)	20%
	<b>Unfrozen Product:</b>	
0306.21.01	Lobsters (Palinurus, Palunirus and Jasus species)	20%
0306.22.01	Lobsters (Homarus species)	20%
1605.30.01	Prepared lobster or preserves	20%

### PHYTOSANITARY REGULATIONS

All imported fisheries products must comply with sanitary requirements established by the Secretariat of Health, published in the Official Gazette on January 18, 1988. The law prohibits the marketing of fisheries products whose natural appearance, composition or quality have been adulterated in any way; they are considered to be contaminated when they exceed the limits allowed by the Secretariat for pathogenic agents, foreign substances, antibiotic residues, hormones and toxic substances such as heavy metals, biotoxins, petroleum and hydrocarbon derivatives, insecticides, bacteriostats and radioactive substances.



The Secretariat of Health requires that importers apply for, and obtain, an "Autorización Sanitaria Previa de Importación" for all food and fish products. In order to obtain such authorizations, importers must present laboratory analysis results taken in the country of origin, which certify that the product is safe for human consumption.

In the case of lobsters, Fisheries and Oceans Canada is supportive of Canadian exporters who wish to ship product into the Mexican market. On the request of Canadian lobster exporters, FANDO's regional Inspection Services Branch will issue certificates to enable Mexican customers to process their import applications in accordance with the rulings of the Secretariat of Health. Interested parties should contact the regional offices of Fisheries and Oceans, or Mr. B.J. Emberley, Director General, Inspection and Enforcement, Fisheries and Oceans, 200 Kent Street, Station 1338, Ottawa, Ontario, Canada K1A 0E6.

### MARKETING

As indicated earlier, the principal supplier of lobster to the Mexican market is the United States, consisting of rock lobster and other sea crayfish. Official Mexican statistics make no mention of *Homarus Americanus* entering from that country. In recent months there has been growing interest among potential seafood importers and distributors for information on Canada's lobster industry.

Annex I of this paper lists the companies which inquired specifically about lobster at the Canada Booth during the recent fisheries exhibition organized by the Secretariat of Fisheries in Mexico City. Canadian exporters may communicate with these contacts to initiate a dialogue which could possibly lead to some future business.

*Homarus Americanus*, because of its large size and more choice flesh in the claws, is considered to be a delicacy among Mexico's gourmet trade. The recent easing of import controls for fisheries products could result in increasing future sales of Canadian lobster and crayfish into the Mexican market. It should be recognized, however, that because Mexico is one of the world's major lobster producers, significant increases to the present import levels would seem unlikely. Canadian exporters may have to be content with supplying a niche market at best.

Sales of imported seafoods to Mexico are usually made through local agents or distributors, who normally operate on a commission basis. Products coming into the country move from the exporter to the local agent or distributor, then he delivers to the wholesaler, supermarkets, hotels and restaurants. Most buyers prefer to deal with



a local agent or distributor who takes responsibility for delivery and product quality, rather than taking the risks involved when purchasing directly from the foreign supplier.

The Mexican market is highly competitive, and demands good quality product, guaranteed supply and attractive prices. Canadian companies that can comply with these conditions will be able to establish a foothold in the marketplace.

The Commercial Division of the Canadian Embassy in Mexico will be pleased to provide any assistance or guidance to Canadian lobster exporters wishing to explore this market.

### RESPONSIBILITY

This paper was prepared to assist Canadian lobster exporters having an interest in supplying the Mexican market. It is intended to provide some insight in general terms on some of the existing conditions in Mexico's lobster production and distribution industry, and provide business contacts who might be interested in Canadian product. Companies must tailor their marketing approach according to their particular interests and circumstances.

Further assistance or information can be obtained by addressing requests directly to the Commercial Division of the Canadian Embassy, located at Calle Schiller 529, Col. Polanco, 11580 Mexico, d.f., telephone (011-52-5)724-7900, facsimile (011-52-5)724-7982; or the Latin America and Caribbean Trade Division, Department of External Affairs, 125 Sussex Drive, Ottawa, Ontario, K1A 0G2, telephone (613)995-8804, facsimile (613)943-8806.

Prepared by:

J. Antonio Pahnke  
Commercial Officer

November, 1992



LOBSTER CONSUMPTION - MEXICO

(Kilograms)

YEAR	PRODUCTION	IMPORTS	EXPORTS	APPARENT	PER CAP.
1989	1,842,000	9,150	980,431	870,719	11.13
1990	1,887,000	16,254	1,056,384	846,870	10.44
1991	2,621,000	1,435	939,399	1,683,036	20.33

Source: Secretaría de Pesca, Secretaría de Comercio y Fomento Industrial.





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## MEXICAN LOBSTER IMPORTS

(Kilograms - U.S. Dollar Values)

H.S. Code	YEAR. Origin	1989		1990		1991	
		Volume	Value	Volume	Value	Volume	Value
0306.11.01	U.S.A.	8,459	234,829	15,605	162,884	174	3,499
0306.12.01	--	--	--	--	--	--	--
0306.21.01	U.S.A.	--	--	592	3,645	687	6,991
0306.22.01	Canada	--	--	--	--	392	4,074
1605.30.01	U.S.A.	90	75	57	280	252	1,305
	France	601	2,066	--	--	--	--
TOTAL:		9,150	236,970	16,254	166,809	1,435	15,869

H.S. Code description:

0306.11.01 - Rock lobster and crayfish (*Palinurus*, *Palunirus*, *Jasus*), FROZEN.0306.12.01 - Lobster (*Homarus*), FROZEN.0306.21.01 - Rock lobster and crayfish (*Palinurus*, *Palunirus*, *Jasus*), NOT FROZEN.0306.22.01 - Lobster (*Homarus*), NOT FROZEN.

1605.30.01 - Lobster, Prepared or in Preserves.

Source: Secretaría de Pesca, Secretaría de Comercio y Fomento Industrial.



**MEXICAN LOBSTER EXPORTS**  
(Kilograms - U.S. Dollar Values)

H.S. Code	YEAR: Origin	1989		1990		1991	
		Volume	Value	Volume	Value	Volume	Value
0306.11.01	U.S.A.	928,712	18,073,859	1,011,215	16,044,967	799,306	12,817,581
	Japan	--	--	25,401	336,828	25,404	336,810
	France	--	--	--	--	84,841	1,636,614
	Spain	--	--	--	--	663	19,212
	Australia	--	--	--	--	7	40
0306.12	U.S.A.	41,010	529,976	1,450	1,801	19,670	109,559
0306.21.01	U.S.A.	10,709	149,443	18,318	94,496	9,508	187,511
<b>TOTAL:</b>		980,431	18,753,278	1,056,384	16,478,092	939,399	15,107,327

H.S. Code description:

- 0306.11.01 - Rock lobster and crayfish (Palinurus, Palinurus, Jasus), FROZEN.
- 0306.12 - Lobster (Homarus), FROZEN.
- 0306.21.01 - Lobster (Homarus), NOT FROZEN.

Source: Secretaría de Pesca, Secretaría de Comercio y Fomento Industrial.



ANNEX I

POTENTIAL MEXICAN BUYERS, IMPORTERS, DISTRIBUTORS OF LOBSTER

Mr. Javier Olea Adame  
General Manager  
Restaurant La Hacienda Ixtapalapa  
Calz. Ermita-Ixtapalapa No. 2000  
Mexico, D.F.  
Tel: (5)691-6525, 691-6562  
Activity: Restaurant  
Interest: Prices of Canadian lobster and names of exporters; presently buying Maine lobster.

Ing. Federico Mascarell  
Director  
Distribuidora Mascarell, S.A. de C.V.  
Hamburgo No. 85  
Col. Juárez  
06600 Mexico, D.F.  
Tel: (5)514-5607; Fax: (5)533-6777  
Activity: Marketing  
Interest: All types of fish and shellfish products, fresh, frozen.

Lic. Alberto Frías S.  
Director - Strategy and Product  
Comercializadora de Hoteles y Restaurantes  
Manzanillo 83, Piso 10  
Col. Roma Sur  
06760 Mexico, D.F.  
Tel: (5)264-6090; Fax: (5)264-8958  
Activity: Supplier of food products to hotels and restaurants.  
Interest: Frozen lobster.

Mr. Miguel Ochoa M.  
Mariscos del Golfo  
Calle Nicolás Romero No. 3  
Uruapan, Michoacán, Mexico  
Tel: (011-52-452)36587  
Activity: Deals in shellfish from Gulf of Mexico sources.  
Interest: Marketing of Canadian lobster.





Mr. Miguel Aracama de la Fuente  
Purchasing Manager (fish and shellfish)  
Comercial Mexicana, S.A. de C.V.  
Callejón San Antonio Abad No. 54  
Col. Tránsito  
06820 Mexico, D.F.  
Tel: (5)522-7060, 522-2938; Fax: (5)522-6439  
Activity: Supermarket chain store.  
Interest: Information on Canadian lobster products for export.

Mrs. Esther Torres G.  
Purchasing Manager  
Dee Soul, S.A. de C.V.  
Montes de Oca No. 3  
Col. Condesa  
06140 Mexico, D.F.  
Tel: (5)286-0068  
Activity: Dealing in frozen foods.  
Interest: Distribution of Canadian lobster products.

Mr. Julián A. Domínguez  
Manager  
Distribuidora Bahía  
Calz. de la Viga No. 125-C  
Col. Tránsito  
06820 Mexico, D.F.  
Tel: (5)764-1291; Fax: (5)560-7701  
Activity: Purchase-sale of fish and shellfish.  
Interest: Import/ distribution Canadian shellfish (incl. lobsters)

Mr. David González Rossano  
Director General  
Comar, S.A. de C.V.  
Roa Bárcenas No. 378-D  
Col. Artes Gráficas  
15830 Mexico, D.F.  
Tel: (5)740-5739; Fax: (5)740-7864  
Activity: Purchase-sale of fish and shellfish.  
Interest: Marketing of Canadian lobster.



Mr. Victor M. Gómez López  
Commercial Deputy Director  
Cafetería Toks, S.A. de C.V.  
Jaime Balmes No. 11, E.B. Piso 5  
Col. Los Morales-Polanco  
11510 Mexico, D.F.  
Tel: (5)393=-9115, 395-6211; Fax: (5)393-7073  
Activity: Food and beverages (cafeteri chain)  
Interest: Lobster tails/claws

Lic. Armando Rojas/Victor Almazán  
General Directors  
Organización Aro, S.A. de C.V.  
Av. Américas No. 440  
Sector Hidalgo  
44650 Guadalajara, Jal., Mexico  
Tel: (3)615-5295, Fax: (3)616-9873  
Activity: Wholesale distributor of seafoods, import and domestic products.  
Interest: lobster (splitted, whole, frozen).

Lic. Miguel Olgúñ  
Director  
Comercializadora Chef, S.A.  
Ricardo Castro No. 60  
Col. Guadalupe Inn  
01020 Mexico, D.F.  
Tel: (5)550-9029; Fax: (5)548-9695

Mr. José María Meléndez Hernández  
General Manager  
Restaurantes Las Brisas del Mar  
Apartado Postal 13  
Boca del Río, Veracruz, Mexico  
Tel: (011-52-29)860-080, 860-224, 374-221, 374-100; Fax: (29)373-403, 372-928  
Activity: Chain of four restaurants in Veracruz.  
Interest: cooked-frozen and live lobster.

Ing. Victor Almazán de la Rosa  
Owner  
El Pedregal  
Av. Hidalgo Oriente No. 1302- A & C  
50060 Toluca, Estado de Mexico  
Tel: (011-52-72)150-581; Fax: (72)150-580



Activity: Seafood distributor.  
Interest: Live and cooked-frozen lobster.

Mr. Jorge Sugawara  
Director General  
Restaurantes Daruma  
Río Pánuco No. 129  
Col. Cuauhtémoc  
06500 Mexico, D.F.  
Tel: (5)208-7984, 207-9622; Fax: (5)511-8115  
Activity: Chain of Japanese restaurants.  
Interest: Whole frozen lobster, frozen lobster tails.

Mr. Francisco Trujillo Sáenz  
Supervisor  
Gourmet Matterhorn  
Poniente No. 152  
Col. Vallejo  
00720 Mexico, D.F.  
Tel: (5)587-6161  
Activity: Gastronomy.  
Interest: Lobster imports.

Mr. Sergio Preciado González  
Casas Grandes No. 21 - 2  
Col. Narvarte  
03020 Mexico, D.F.  
Tel: (5)538-8620; Fax: (5)538-6619  
Activity: Purchase-sale and distribution of fishries products.  
Interest: Prices of cooked-frozen lobster.

Mr. Joel Morán Hernández  
Productos Mar de Mexico, S.A.  
Calzada de la Viga No. 124-B32  
Col. Lorenzo Boturini  
15820 Mexico, D.F.  
Tel: (5)768-6365  
Activity: Purchase-sale of fish products.  
Interest: Prices of cooked-frozen lobster.



Mrs. Aurora Juárez Martínez  
Marketing Manager  
Aurora Juárez Martínez, S.A. de C.V.  
Providencia No. 1412, Edif. c-602  
Col. Del Valle  
03100 Mexico, D.F.,  
Tel: (5)575-3818; Fax: (5)559-7344  
Activity: Marketing of consumer products.  
Interest: Representation of Canadian exporter(s) of fisheries products.

Lic. Ricardo Calzada Garza  
Grupo Industrial URBI, S.A. de C.V.  
Lafayette No. 14  
Col. Anzures  
11590 Mexico, D.F.  
Tel: (5)254-6000, 254-1803, 254-5711; Fax: (5)255-1918  
Activity: Importer/distributor of fisheries products.  
Interest: Import/distribution of Canadian live lobster.

Mr. Alfonso de la Mora  
REIMSA  
Hidalgo No. 56  
Col. Tlalpan  
14000 Mexico, D.F.  
Tel: (5)655-7888, 573-6332; Fax: (5)573-3395  
Activity: Representations, Import, Export.  
Interest: Importation and distribution of Canadian lobster.

Pescadería Puerto Angel  
Ernesto Pugibet No. 21 - Local 89  
Col. Centro  
Mexico, D.F.  
Tel: (5)512-8888  
Activity: Supplier to hotels and restaurants.  
Interest: Import fisheries products.

Pescadería Sanitaria, S.A. de C.V.  
Calzada de la Viga 216  
15830 Mexico, D.F.  
Tel: (5)740-9676, 740-8333, 740-8873





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