

# Doing Regional History: A Theoretical Discussion and some Mexican Cases

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## ABSTRACT

Regionality is seen to be a major force in the economic, social, and political development of Mexico. Starting with central place theory, an historical typology of Mexican regional spaces is developed along the lines of solar and dendritic regions, relating especially to the colonial period and the nineteenth century. The historical cases of Yucatán, the Morelos sugar zone, Michoacán, and the Guadalajara region are examined.

## INTRODUCTION

If one reads very far in the recent literature on Mexican regional history, one rather quickly discovers an interesting fact: regions are like love --they are difficult to describe, but we know them when we see them. Why the lack of systematic definitions of a concept becoming so central to recent historical work on Mexico and Latin America as a whole, when we are ready to fight to the death over such theoretical constructs as feudalism, dependency, and social class? The reason, I would suggest, is clear enough; most of us already think we know what a region is: it is the area we are studying at the moment. In practice this most often boils down to a city or town with a space around it ---for example, the Puebla region, the Guadalajara region; while others are designated by some more general term not linked to a specific city--- the Bajío, the Huasteca, the Northwest, the Morelos sugar region, and so on. This common usage has an implicit structure of categories which I will address at least obliquely later on. The basic point is that with these simple images of polarized and non-polarized space we already have the elements of definition of the concept of region, borrowed from central-place theory as developed by economic geographers. Yet apart from such primitive a priori formulations we generally don't waste much time trying to clarify what we mean when we talk about geohistorical regions.<sup>1</sup> Thus we find ourselves as historians in the peculiar but not unfamiliar position of operationalizing a complex concept before defining it. But regions are hypotheses to be proven, and when we write regional history we should be attempting to do just that rather than describe antecedent entities.

Despite this theoretical haziness, however, we see regions in Mexico everywhere we look, and in fact the geohistorical region and regionalism are central to the Mexican experience. This must mean that the concept has considerable utility for us. In fact, in the memorable phrase of Claude Lévy-Strauss, regions are "good to think." My method in this paper is to play with the idea of region in a hopefully useful way, to approach a definition of it, and to deal with some of its implications for the way we locate ourselves in space, time, and society. To illustrate my points I will make some allusive but concrete reference and comparisons to empirical examples drawn from the literature on geohistorical regions in Mexico.

The concept of region in its most useful form, it seems to me, is essentially a spatialization [end p. 21] of an economic relationship.<sup>2</sup> A very simple, and admittedly tautological, working definition would be a geographic space with a boundary to set it off, the boundary determined by the effective reach of some system whose parts interact more with each other than with outside systems (Van Young, 1981, 3-4) .. On one hand, the boundary need not be impermeable, nor, on the other, is it necessarily congruent with the more familiar and easily identifiable political or administrative divisions, or even with topographical features.<sup>3</sup> Simple as this definition is, why is it even necessary to specify what we mean by regions before we undertake to describe them, instead of just bumping along intuitively? I would suggest that there are three reasons. First,

if we do not establish some theoretical, *a priori* definitions, we may end up explaining the wrong social phenomena with reference to regions; that is, if we don't know what a region is ahead of time, it is hard to use the concept of region as an explanatory factor in our analyses. For example, certain economic phenomena notable in Mexican history may have more to do with the reductionist tendencies of extra-regional or even extra-national forces than with the internal characteristics of regions in and of themselves (Moreno Toscano and Florescano, 1977). Then again, the lack of a sufficiently rigorous definition (or perhaps better said, a definite set of questions) regarding regions may have led to a certain confusion between *regionality*--the quality of being a region; and *regionalism*--the self-conscious identification, cultural, political, and sentimental, that large groups of people develop over time with certain spaces.<sup>4</sup> Second, comparisons built around the concept of regionality become problematic if we do not know more or less clearly what variables we are comparing, or if the ones we pick--location of production functions, marketing structures, resource endowment, and so on--are not comparable. Finally, regionality itself is a dynamic concept whose study can tell us much about fundamental types of social change over time in defined spaces; if we have no model of what comprises a region, how are we to deal convincingly with change other than in a descriptive manner? To sum up with the words of Walter Isard, the developer of the hybrid discipline of regional science (1975, 12, emphasis Isard's), "How can you start collecting information for a regional study when you have not discussed the *concept* of a city or a region? You are putting the cart before the horse."

Why, particularly with regard to Mexico, are regions good to think? Many reasons could be adduced, I believe, but two in particular suggest themselves strongly, one of an empirical/historical nature, and the other of a theoretical nature. In the historical case, regions seem to correspond in some way to natural horizons, to natural empirical categories for locating ourselves in space which probably have not changed much since pre-industrial times; that is, the actual space itself (its size) may have altered, but probably the *idea* has not. Pierre Goubert (1971) has made the point that in the pre-railway age most Europeans lived their lives within the precinct of a parish, generally comprised of a small town and the surrounding district--an area traversed in a day's walk or ride, probably from ten to thirty miles in diameter. He goes on to note that such people would have considered themselves first citizens of a locality, and then subjects of a king.<sup>5</sup> While Goubert does not provide a technical definition of region, his main point, I think, nonetheless holds for rural people in traditional Mexican society, especially beyond the level of the village or hamlet. Migration patterns, for example, tend to confirm this, at least for the era before readily accessible mass transportation. The major sending areas for rural migrants to late-colonial Antequera, Guanajuato, and Guadalajara were primarily within the hinterlands of these regional capitals (Chance, 1978; Brading, 1971; Van Young, 1981; Cook, 1970). In the theoretical case, regional analysis helps to resolve the tension between generalization and particularization. Among modern students of Latin America the anthropologist Robert Redfield was among the first to try to bridge the gap between local, small communities and national-level societies by construction of his folk-urban continuum. On the theoretical level, regional analysis can do for spatial systems what Redfield tried to do for cultural ones--reconcile the micro-perspective with the macro-perspective.<sup>6</sup> To quote another anthropologist, Carol Smith (1976a, 4), upon whose work much of my present analysis rests:

With other approaches, generalization requires one to assume that what is true of a part is roughly true of the whole or that what is true of the whole is also true of the parts. Regional analysis can build system variability into its mold[**end p.22**] of explanation, so that generalization is neither far-fetched nor banal.

Can regional analysis really accomplish all that its more ardent proponents would claim for it? Certainly one must admit that such an approach to historical structure and change has certain problems or limits. One of these is that classical central-place theory, upon which regional analysis is built, requires a large number of *ceteris paribus* assumptions---the even distribution of population across an unbounded isotropic plane, perfect economic rationality of consumers, and so on---that are in reality seldom met, certainly under Mexican conditions (Berry, 1967; Smith, 1975).<sup>7</sup> Another conceptual problem is to determine the next higher level to

which regions relate-the larger matrix into which they fit: is it a meta-region, a nation-state, the world-system, or what? In practice defining this upper limit to the hierarchy is a good deal more difficult than defining the lower one, which is likely to be a city, town, village, or even an individual firm, in some cases. Finally, regional analysis, with its inevitable emphasis on economic elements, spatial relationships, and certain types of social interactions, may leave aside other important aspects of structure and change, such as ethnicity and ethnic conflict, for example.<sup>8</sup> Notwithstanding these problems, the regional approach has proven itself of enormous value in recent studies, and should continue to do so in the future. Furthermore, the regional focus provides a point of convergence for two central themes of historical analysis--city and countryside.

Looked at in a certain way, the internal structure of a region also constitutes a matrix for the convergence of physical and social space.<sup>9</sup> As theoretical concepts, regional and social class systems demonstrate a notable parallelism. The concept of region essentially spatializes economic relationships, and the concept of social class does roughly the same thing, substituting the metaphor of social space (as when we speak of social distance, social mobility, and so forth) for that of the actual distances of physical space. In addition, regional and class systems share at least three other common, interrelated characteristics. They demonstrate differentiation-that is to say, functional differences among their component parts or groups. They demonstrate hierarchy-that is to say, asymmetrical power relationships within the system. In the case of class systems this is obvious in the unequal distribution of wealth, status, and political power, but it also occurs in regional systems, of course, in the form of settlement hierarchies. Finally, they display the characteristic of articulation-that is to say, some kind of predictable, ongoing interaction among the elements which constitute the system.<sup>10</sup> Beyond what may be regarded as fortuitous similarities, however, the regional and class modes of analysis intersect in meaningful ways, so that one may speak of social structures peculiar to certain types of regions for certain explicit theoretical reasons. The relationship between geographical space and social structure in Mexican history, in fact, is one of two major issues which I particularly want to address in the rest of this paper. To do this, I want first to develop briefly a dualistic typology of historical Mexican regions, and then make a few empirical observations linking certain elements of that typology to the peculiarities of Mexican economic and social development up through the past century.

Regional economies and societies in general, and in Mexico in particular, are likely to be quite different one from the other depending on whether they are linked to internal or external markets or, to put it in terms of regional analysis, whether the central place in the region is within it or outside of it. Some regions, therefore, may be seen as centering on cities, and as having a more or less symmetrically structured urban hierarchy and a concomitant internal division of labor. Other regions may be described as groupings or clusters of production units or firms linked to an outside market in a qualitatively similar manner, and in which regionality is defined less by economic complementarity than by a sort of phenomenological similarity. As it happens, this admittedly over-simplifying dichotomy corresponds rather neatly to the functional and formal definitions of regions as developed primarily by geographers.<sup>11</sup> Graphic metaphors for these two very different forms of region would be, respectively, those of a pressure cooker in the one case, and a funnel in the other. The distinction I am making between pressure cooker and funnel types also corresponds in a general way to characteristic regional marketing systems designated by central-place theorists as solar and dendritic types, respectively.<sup>12</sup> On the basis of this typology, I would further suggest the hypothesis that **[end p. 23]** the complexity of regional social structures and the nature of class relations is likely to be strongly influenced by the internal spatial and settlement arrangements of the two types. In the pressure cooker model, characterized by a relatively complex and hierarchically polarized internal space, we are more likely to see, over time, a proliferation and complication of internal structures; for example, in landlord-peasant relationships, in credit usages, in marketing and commercial arrangements, in the social role of mediating groups, and in class relations. In the funnel model, characterized by a relatively low degree of internal spatial polarization, we are likely to see a simplification and homogenization of internal economic and social relationships, and a concomitantly sharper differentiation between social classes. In other words, I am

suggesting that there is an inverse connection between spatial and social polarization, or to put it in yet another fashion, that complexity produces complexity, and simplicity simplicity. Lest it be objected that I am re-inventing the wheel, I readily admit that the dual typology itself is hardly novel, and echoes the accepted distinction between non-exporting and exporting regions. The point I am trying to make, however, is that the presence or absence of a dominant export activity has interrelated spatial and social implications for the host region, something often overlooked by historians working on Latin America.<sup>13</sup>

Before I go on to illustrate my hypotheses about regional types and their implications, we need to take a step backward for a moment to the basic concept of region, in order to clarify a central assumption. Since, as I have suggested above, regions are properly defined by the range of some kind of system internal to them; and since human societies are typically constituted by a large number of different kinds of mutually affecting systems, what is the system of choice for defining regions? One can readily call to mind several which might be candidates, including the facts of physical geography itself, the distribution and type of economic production, political structure, and exchange or market relationships. It is this last system—the structure of exchange, or markets—that lies at the heart of central-place theory, which in turn provides the basis for most of the recent theoretical work on regional analysis.<sup>14</sup> Central-place theory has been defined, in fact, as the theory of the location, size, nature, and spacing of clusters of market activity. Geographer Brian Berry (1967, 1) has put this very clearly:

It is in the system of exchange, through the process of distribution, that the supplies of producers and the demands of consumers are brought together. In this sense, the interconnections of the exchange network are the strands that hold society together.<sup>15</sup>

-- and that hold regions together, one might add. It is to market relationships, then, that we should look if we would understand the nature of geohistorical regions.

One of the peculiarities of Mexico's historical development, it seems to me, is that, aside from the perennial presence of mineral exports, primarily in the form of silver and petroleum, the country has never found itself in the grip of the monocultural export cycles one has come to associate with most of Latin America. Examples of these boom-and-bust cycles would be first sugar and then coffee in Brazil; guano and then sugar in Peru; cattle, sheep, and wheat in Argentina, and so on.<sup>16</sup> There are not many instances of the funnel or dendritic region to examine in Mexico's history, therefore, and certainly none which occupied such a central role in the economic development of the country as a whole as the ones alluded to above. Two cases which do illustrate aspects of the funnel/dendritic type, however, are the sugar economy of the Morelos area extending into the nineteenth century, and the development of the henequen industry in nineteenth-century Yucatan. It is precisely the lack of such unbalanced export-dominated regions that make the pressure cooker/solar regional type relatively frequent in Mexico, and the two cases of this I wish to discuss briefly are the Guadalajara region and parts of the colonial bishopric of Michoacán.<sup>17</sup>

What one expects to see in regions structured along dendritic lines of internal organization is an orientation toward the outside for purposes of marketing a single export staple—thus the funnel metaphor. This would certainly be the case in the sugar-producing zone of the Morelos lowlands during the colonial period, and even more markedly so in the nineteenth century with the considerable expansion of the industry and the advent of the railroad. Furthermore, one would expect to see the atrophy of internal marketing linkages; the squashing [end p. 24] of the regional urban hierarchy into extreme non-lognormality—that is, the dominance of one entropot city and/or an external metropolis in flows of goods into and out of the region; a high degree of concentration of property; and simplification of the social stratification system. As to the breaking down of internal commercial linkages, some of the colonial towns of the area, such as Yautepec and Cuautla, certainly look like the nodal points in a dendritic system centering on Mexico City (De la Peña, 1981b, 25-26).

<sup>18</sup> Since the sugar produced in the region could not possibly be consumed locally, either in the colonial or post-colonial periods, Mexico City served as the major market and therefore as the regional primate city, showing an extremely high degree of primacy.<sup>19</sup> All writers on the history of the Morelos export zone have pointed to the tendency for property in the sugar-producing areas to concentrate over time, due to the possible economies of scale which such concentration offered, among other factors.<sup>20</sup> Finally, both De la Peña (1981 b) and Martín (1985) point to the social simplification of rural areas under the impact of sugar: that is, its homogenizing effects—the tendency for small producers and middling groups to be wiped out; and Martín especially to the resurgence and proliferation of small producers in the former export zone when large-scale sugar production receded from the late seventeenth century until about 1760.<sup>21</sup>

Perhaps an even clearer case of the funnel, or dendritic, region, is that of northern Yucatán under the impact of henequén export development in the nineteenth and early twentieth centuries. The Yucatecan henequén boom is an interesting case because, unlike the colonial and nineteenth-century Morelos sugar zone, where the staple product was present from nearly the beginning of the colonial era, in Yucatán the industry of the classic export boom period was created *ex nihilo* and had a relatively short cycle. Before henequén took hold in the latter half of the nineteenth century, the peninsula was quintessentially peripheral—a genuine economic backwater. In an excellent article and in other work, Patch (1985) has described the basic dynamics of the colonial economy in terms strikingly similar to the rest of New Spain. The basic elements here were Indian demographic recovery, land pressure, large rural estates, local urban livestock and grain markets, and so forth: in short, a pressure-cooker situation, or several of them, constituting a number of small regional complexes.<sup>22</sup> Slightly later, what might have been an export cycle elsewhere took the form in Yucatán, in Cline's (1947-48, 79) phrase, of an "episode". This was the development of the sugar industry along the southeastern frontier during the period 1750-1850. Despite the overwhelming orientation of this sector toward production for an internal peninsular market, one begins already to see the effects of the internal logic of economies of scale, and the harsh labor regime pre-figuring that of henequén (Wells, 1985, 24).<sup>23</sup> While it would be an exaggeration to say that the situation of the peninsula changed radically overnight with the advent and rapid growth of the henequén industry after mid-century, it is nonetheless true that the fiber industry changed the economic structure of Yucatán and with it the internal structure of Yucatecan regions. Fiber production in the northwest of the peninsula, chiefly organized along lines of large, highly capitalized estates, quadrupled during the 1870s, with a predictable effect on the overall size and organization of the labor force. By 1900, about 75 percent of the officially calculated acreage of Yucatán was devoted to henequén culture, and a half to three-quarters of the peninsula's rural population lived on plantations (Strickon, 1965, 55-56). Not surprisingly, the rural Indian population of the henequén producing region became heavily proletarianized and the village communities weakened. The region appears to have undergone the social skewing and simplification of class structure which the funnel/dendritic model would predict.<sup>24</sup> Furthermore, unlike the traditional mixed-production haciendas of the pre-henequén age, the plantations made no attempt at self-sufficiency. This meant that a complementary maize economy grew up in the old southeastern frontier zone to feed the food-deficit henequén region, a development which forestalled a diversified recovery in the old sugar zone.<sup>25</sup> Finally, one would expect to see under the impact of such changes a simplification and homogenization in the regional commercial and marketing arrangements. To quote Smith (1977, 138):

... because the production system is highly concentrated, the distribution system is highly concentrated. And because the market for the region's surplus is external, there is no need for a well-articulated rural marketing system.<sup>26</sup> [end p. 25]

By contrast with the funnel/dendritic regions I have just described, parts of the colonial bishopric of Michoacán and the extended hinterland of Guadalajara markedly displayed the characteristics of the pressure cooker/solar regional type. Taking Michoacán as a whole, one diagnostic criterion for the lack of a strongly funnel-like, dendritic structure is the internal consumption of products often associated elsewhere with

export markets, such as sugar. At the close of the eighteenth century, for example, only about 25 percent of the bishopric's 170,000- *arroba* sugar production was destined for export out of the area.<sup>27</sup> Another characteristic of an inward-turning as opposed to an outward-turning orientation was the presence of periodic markets in small and middle-sized towns and some larger cities: Zamora and Tangancicuaro on Sundays, Patzcuaro on Fridays, Valladolid on Thursdays, and so forth.<sup>28</sup> Still other signs of a pressure cooker/solar pattern appear in the form of relatively complex and widespread local marketing arrangements, and of very limited importation of foodstuffs, except for high unit/value items like alcoholic beverages and cacao (Morin, 1979, 145).

During the late colonial period and early nineteenth century, the Guadalajara region provides an even clearer example of the pressure cooker/solar type of central-place system, or at least one better known to me. Guadalajara, the political and administrative capital of the area, certainly functioned as the regional primate city, and the urban hierarchy of its extended hinterland demonstrated a concomitantly high degree of non-lognormality. Using the volume of commercial sales for selected towns in the Guadalajara region in 1800 as a proxy for town size, sales in the primate city were more than twenty-five times greater than its nearest rival within the region, the substantial provincial town of La Barca.<sup>29</sup> Furthermore, the commercial or marketing structure of the region displayed the characteristics one would more or less expect to find in a pressure cooker/solar type. Thus, despite the reductionist tendency of the commercial relationships centered on the regional primate city, country towns had at least some lateral linkages in terms of credit relationships, itinerant merchants, periodic markets, and so forth. On the other hand, intraregional production specialization, though it existed, was limited.<sup>30</sup> A recast and analysis of data developed in a statistical treatise about the middle of the nineteenth century by a local statistician-geographer reveals a large degree of homogeneity in the regional commercial network, and a squashed urban hierarchy approximating the two-tiered arrangement one would expect to find in such a regional type. Of the approximately twenty towns covered in the survey whose commercial establishments I have classified according to the simple tri-partite division retail, service, and artisan-retail, an average of two-thirds were small retail establishments, with the service and artisan-retail types dividing up the remainder evenly. Towns at some distance from Guadalajara in dry-farming areas with mixed economies of cereals and livestock tended to have very high percentages of retail establishments, while the region as a whole seems to have enjoyed a relatively low degree of intra-regional specialization, with strong vertical and comparatively weak lateral linkages. Small country stores, and also the larger establishments in provincial towns, dealt mostly in dry goods, food, and hardware; tended to have limited inventories; and habitually carried large numbers of very small debts on their books, many from rural Indians, secured with various *prendas*, including guns, agricultural implements, articles of clothing, and religious objects (Van Young, 1978, 519-527; and also Van Young (1982). Finally, despite the increasing agricultural commercialization, skewing of property holding, and rural proletarianization, the region sustained a remarkably complex agrarian structure, including a large group of independent family farmers, or *rancheros*, and a substantial scattering of rural middlemen, occupational pluralists who provided important commercial, credit, and brokerage functions in the regional economy and society.

My final point has to do with the implications of such regional characteristics for the overall economic and social integration of Mexico. If the pressure cooker/solar model has any predictive value for regional economies, we should expect to see three features of such systems: 1) markets of a very limited geographical range for almost everything except high value bulk commodities; 2) low levels of regional exports for agricultural commodities; and 3) an overall low level of commercial exchange among regions of this type making up a larger **[end p. 26]** economic space. Taking the Guadalajara region as a case in point, these characteristics are precisely what one in fact sees around 1800 and probably much beyond. Such a conclusion in the case of the Guadalajara region takes on even more significance because this area of New Spain is typically cited as being, along with those of the Bajío and Michoacán, among the most economically dynamic of late colonial New Spain (Florescano and Gil Sánchez, 1974). If, for the sake of discussion, one analyzes the figures on regional production and commerce given in a report for the year 1803 by José Fernando de

Abascal, the Intendant of Guadalajara, one sees that net exports from the Intendancy were comparatively small. Of a total gross regional product of some 8,729,000 pesos, net exports amounted to 443,000 pesos, or about five percent of the gross regional product, or approximately ten pesos per capita for the greater Guadalajara region's total population. If one eliminates mining production from these figures, virtually all of which was exported from the Intendancy, the figure drops to two percent. Furthermore, if one increases Abascal's maize production figure by 25 percent, as seems reasonable, to correct for unrecorded subsistence production of this basic commodity, the figure on exports would necessarily drop even further.<sup>31</sup> What one sees, then, at least in this case and probably other regions as well, is a kind of iceberg effect in which only the tip of the regional economy was drawn into a wider commercial nexus, while the enormous mass of it, to the degree that it was commercialized at all, produced, consumed, and traded on an intra-regional level only. One can even envision, in a general way, multiple levels of economic integration embracing primary exchanges (administration and taxation); secondary exchanges (consumer durables and luxuries, and capital flows); tertiary exchanges (consumer non-durables on a commercial scale, and possibly labor mobility); and quaternary exchanges (small-scale consumer non-durables).<sup>32</sup> In lieu of hard evidence indicating substantial inter-regional trade, data on the arbitrage between regional markets of commodity prices such as maize or other grains is sometimes used to infer the existence of such commercial connections and the developed, wide-ranging market economy assumed to underlie them, but this argument is not altogether convincing (Lindo Fuentes, 1980).<sup>33</sup>

What, finally, are the implications of such a regional structure for the society as a whole? First, and most obviously, it indicates a weak horizontal or spatial integration, and goes some way towards explaining the centrifugal tendencies in Mexico notable during the colonial period, and even more so after independence. Second, the weakness of horizontal articulation would directly relate to the weakness of vertical, or socio-political, articulation, since it probably indicates a relatively low social division of labor. Admittedly, one is likely to find a crazy-quilt pattern here, with fields of distortion surrounding mining areas, administrative centers, and the ever-anomalous Mexico City. And third, one would expect to see such a society, in times of acute political crisis, tend to break up into its constituent parts along the pre-existing lines of stress I have just been outlining. This is exactly what happened, it seems to me, in the years following 1810, in which one can trace through the social history of rebellion the deep-running disarticulation of Mexican society all the way down to the village level.

## NOTES

<sup>1</sup> Many --in fact *most*-- works dealing with Mexican regional history do not specify what they mean by region, but rely on a kind of *impasto* description to arrive at their definitions. Allen Wells, for example, in his excellent book (1985), treats Yucatan as a single region, without attempting any conceptual justification for such a definition, which leads him into some apparent difficulties in dealing with what he must term *intra*-regional economic differentiation (northwest vs. southeast), but which in fact look more like *inter*-regional differentiation.

Claude Morin, in his extensive and stimulating work on Michoacán in the eighteenth century (1979), acknowledges (175) that the concept of region may mean something more to an economist than to a sociologist or geographer, but then opts to study his region as defined by political-administrative boundaries, which leads him into difficulties similar to those which beset Wells. In another important recent study (1984), Mark Wasserman employs the word region in one form or another twenty-one times in his first four pages, but defines the [end p. 27] term (not wholly convincingly) as being congruent with the political borders of Chihuahua State. Joseph Love, on the other hand (1978), develops an interesting treatment of regions based on what he calls uniform and nodal regions (i.e., formal and functional regions, respectively). Ultimately, he lays most stress (as one would expect of a political historian) on regions as parts of systems, bouncing off each other like billiard balls, as opposed to their internal structures. For similar examples on a smaller scale, see Bernstein (1967), and Luis González (1982). In fairness to González, it should be noted that he has

demonstrated a long-standing interest in the "microhistory" of what he has called "*terruñíos*," or localities, rather than in larger entities or systems. On the other hand, Gonzalez acknowledges (1973, 37) the relationship of local (regional) history to considerations of spatial structure when he writes: "En la historia crftica lo basico es el tiempo ... En la historia local es muy importante el espacio." On all these aspects see Eric Van Young (1981,3-5; 1983,5-61; 1984),

<sup>2</sup> This point of view is not altogether congenial to traditional economic theory, which assumed, implicitly, that spatial resistance did not enter into equilibrium models of the economy, in which " ... everything ... is in effect compressed to a point," creating a "dimensionless habitat" in the words of Walter Isard (1956,25). For a general theoretical and historical introduction to location theory and central-place theory, beginning with Von Thünen and that hold regions together in the early nineteenth century, which underlies much of the present paper, see Isard (1956, 1-23) and Berry (1967, 59-73), and more particularly the well-known essay of Carol Smith (1976b). For a stimulating interdisciplinary synthesis owi ng much to the anthropological point of view, see Guillermo de la Peña (1981a).

<sup>3</sup> Ciro F. Cardoso (1982) makes this point in a short article distinguished by flashes of clarity and insight alternating with puzzlingly obscure passages.

<sup>4</sup> This conceptual problem seems to lie at the heart of the studies of Bernstein and González, and possibly also of the otherwise masterful synthesis of Barry Carr (1973).

<sup>5</sup> Cardoso (1982, 4-5, 8) takes issue strongly with Goubert's analysis, insisting on the impossibility of applying to the New World models of space and population developed for the Old, since colonial Latin America was marked by " ... social and economic mobility, by immigrations, by population transplantation, by the moving frontiers of various types ... " but not on a mundane, day-to-day basis, one should observe. Goubert (1971, 115-116) speaks generally in a deprecating tone of local/regional history, calling the enormous outpouring of antiquarian local history in nineteenth-century France "petit bourgeois social science," adding that in this historiographical genre "History becomes a game where the guiltless amateurs of local history provide others with materials they find useful." González (1982, 31-36), on the other hand, speaks fondly of the local historiographical tradition and its non-professional practitioners.

<sup>6</sup> On Redfield, see also De la Peña (1981 a).

<sup>7</sup> In this connection it is surely no accident that much of Berry's book is devoted to a detailed geographical-historical analysis of the central-place system of southwestern Iowa. For a very interesting attempt to apply some elements of location theory to the Aztec and post-Conquest economic structure of the Valley of Mexico, see Ross Hassig (1985).

<sup>8</sup> This is not necessarily the case, however. Chance's work (1978), though not explicitly cast in a location theory framework, nonetheless clearly establishes the role of spatial elements in the changing ethno-social composition of the Oaxaca region and the city of Antequera. See also the theoretical remarks of Smith (I 976c, 309-374, *passim*.)

<sup>9</sup> For a series of stimulating studies on this theme see volume 2 of Carol A. Smith (I 976a), especially the general introductory essays of the editor herself and Stephen M. Olsen. See also de la Peña (1981 a, 76ff).

<sup>10</sup> With regard to this last point, one is prompted to comment that the strong tendency to regionalism in Mexican history (as also in many other developing countries), and a concomitantly over-developed

regionality, if one may call it that, are frequently symptoms of disarticulated economies. In much the same way, the lack of a strong class structure and its typical replacement by caste, estate, or other strongly segmented structures may be seen as a symptom of weak social articulation. Looked at from this perspective, much of the Mexican historical experience has been a struggle to replace the regional definition of society with a class definition, although theoretically the two concepts are not mutually exclusive.

<sup>11</sup> In the words of Carol A. Smith (1976, 6): "Regions can be defined formally or functionally, the former placing emphasis on the homogeneity of some element within a territory, the latter placing emphasis on systems of functional relations within an integrated territorial system." Marcel Bataillon (1982) makes much the same distinction, placing special emphasis on the presence of cities or central places in functional regions.

<sup>12</sup> I first attempted to develop the pressure cooker/funnel typology in Van Young (1979 and 1984). On the definition of solar and dendritic marketing systems see Carol A. Smith (1976a and 1977).

<sup>13</sup> For a generally interesting and wide-ranging collection of essays concerning the development of agrarian capitalism in general and export economies in particular in Latin America, see Kenneth Duncan and Ian Rutledge (1977); many of these essays, particularly the concluding one by Magnus Mörner, touch on the issues raised in this paper. The pure forms suggested by the pressure cooker/funnel dichotomy exist only in the laboratory of the mind, of course, and in practice actual historical situations are not so simple as the models suggest. In the case of the exporting, or funnel, regions, for example, intra-regional subsistence and commercialized food economies may be linked to the export sector, thus compromising the "simple" funnel model. An instance of this would be the slave and non-slave food and livestock-production sector associated with the sugar economy in colonial and nineteenth-century Brazil; see Schwartz (1984), Stein (1957), and Furtado (1965). On the other hand, regions which are apparently instances of the pressure cooker model, and which seem to be undergoing some kind of autochthonous development, may be linked weakly or indirectly to dynamic external economies or economic sectors. For example, the opening up of northwestern Mexico and the dynamism of the (export-oriented) silver mining economy of western Mexico seem to have had much to do with the economic **[end p. 28]** development of the Guadalajara region in the late colonial period; see Van Young (1981, 142 and *passim*).

<sup>14</sup> The determining influence of space and transport costs on economic production is the main theme of classical location theory, most of which derives from the work of Johann Heinrich von Thünen ([1826] 1966). For an interesting application of von Thünen's ideas to Mexico, see Ursula Ewald (1977). Among geographers, Claude Bataillon (1982, 204), after an eloquent and insightful critique of the theory of natural (i. e. geographical) regions in Mexico, seems to emphasize the production function as the major defining variable of regionalization. This same emphasis would appear to underly the discussion of urban "scale" and the "productive strength of [a given city's] sphere of influence" in Hardoy and Aranovich (1978).

<sup>15</sup> To quote Carol A. Smith (1976c, 312): "Surplus is a product of exchange, not a fact of production, for its level depends upon the means used to extract it, not just the means used to produce it." Market relationships as the central structuring principle of regions are particularly appropriate to pre-industrial or substantially pre-industrial peasant societies, even where important forms of non-peasant production exist. Their appropriateness to regional analysis in industrialized societies, where production relations tend to assume a dominant position, is an open question. On this point, see Smith (1975, 96). As will be seen below, and as is fairly obvious on an empirical level, production and marketing systems are in reality difficult to separate, since often the type of production is antecedent to the type of marketing system.

<sup>16</sup> There is, of course, an enormous body of historiography on these economic cycles and the related social and political effects of staple exports, including most general and case studies along the lines of dependency

theory. A particularly good collection of essays covering most of Latin America in the post-independence period is that edited by Duncan and Rutledge (1977).

<sup>17</sup> The discussion of colonial and post-colonial Morelos is based substantially on Cheryl E. Martin (1985) and De la Peña (1981b). The material on Yucatán is drawn from Robert W. Patch (1985), Strickon (1965) and Wells (1985). The discussion of the colonial Guadalajara region is based entirely on my doctoral dissertation (1978); that of colonial Michoacan on Claude Morin (1979).

<sup>18</sup> See also the remarks on this characteristic of dendritic regional systems by Carol A. Smith (1977, 133-138). Compare also the analysis of Appleby (1976) speaking of the wool-exporting zones of highland Peru in the modern era: "The more land concentrated in fewer hands, the fewer the merchants necessary to serve producers, the more local merchants will be by-passed for larger mercantile houses in higher-level centers, and, consequently, the greater the degree of primacy exhibited in the export area."

<sup>19</sup> On the Mexico City market for Morelos sugar, see the interesting article of Crespo (1984). Crespo's figures (204) indicate that between 1893 and 1911, only about 4 percent of Mexico's total sugar production was exported on the average, ranging from a low of virtually no exports in 1899/1900, to a high of 8 percent a decade later. Much the largest part of sugar production during the colonial period, too, was destined for internal consumption within the central part of the viceroyalty itself, chiefly in the Mexico City market; on this point see von Wobeser (1984). Sugar exports from colonial Mexico to Europe were generally (though not always) unprofitable because of high transport costs compared with Caribbean and Brazilian producers; see Van Young (1970). On nonlognormality as a measure of urban primacy, see McGreevey (1971). Lognormality means that a city's population size is related to its rank in an urban hierarchy - i.e., the second city is half the size of the first, the third is one-third the size of the first, etc. McGreevey's figures (121, Table 2) indicate that of the capitals of eight Latin American countries included in his data (Mexico, Cuba, Chile, Argentina, Brazil, Peru, Venezuela, and Columbia), Mexico City demonstrates the earliest and most notable degree of urban primacy (i. e., nonlognormality).

<sup>20</sup> See also Barrett (1970); Warman (1981); John Womack (1969); and several of the essays in Crespo (1984).

<sup>21</sup> De la Peña (1981 b, 29-37) discusses the social heterogeneity and accompanying diversified economy in the highland areas of the Morelos zone in the colonial period, particularly in Tlayacapan and some other pueblos, and goes on to describe the reductionist effects on this region of the nineteenth-century expansion of sugar in the lowlands (66-68). Martin (1985, 124-155) describes the reductionist effects of the revival of sugar production on the "remarkable social variety" which had developed in the lowland sugar region up to the middle of the eighteenth century, and concludes that sugar culture and its related economic arrangements explain the lack of "symbiosis" characteristic between large production units and peasants in other areas of central Mexico (215-216). For an analysis of even more radical homogenization and social simplification under the impact of sugar culture on Peru's north coast, see Klarén (1973), who describes increasing land concentration, the destruction of a class of prosperous independent small farmers, the disruption of the urban commercial structure by the intrusion of sugar plantations into local exchange relations, and the emergence of a rural proletariat vulnerable to social dislocation and anomie. On the lack of socially mediating groups and "anomie," compare De la Peña (1981b, 66-68 and *passim*).

<sup>22</sup> Patch (1985) stresses in concluding (48-49) the internal causes of change in the colonial economy, primarily population growth, and suggests that only with henequen did the peninsular economy reorient itself toward the outside. Strickon (1975, 44) points out that the exiguous export earnings of Yucatán in the early nineteenth century derived from the extensive livestock economy in the form of beef and other animal products marketed in Cuba. Farriss (1984) has described the social adaptations of Indian society to the

colonial economic regime. For some interesting comparisons with early colonial Central America, see MacLeod (1973).

<sup>23</sup> Strickon (1965, 50) states that in the late 1830s the plantation zone produced sufficient sugar to export from the peninsula. Wells (1985) goes on to say that even with a "sub-regional" division of labor, total peninsular exports, including sugar, were minor compared to the total value of subsistence production (i.e., the traditional maize-centered agriculture).

<sup>24</sup> Wells (1985, 9, I 53ff, 184); Strickon (1965, p. 57). Wells observed (184): "the cooptation of the village ejidos by the henequeneros in the northwest throughout the Porfiriato had [end p. 29] impaired what had once been a healthy peasantry and had isolated the hacienda community from its institutional base, the communal village." He concludes (184) that: "Unlike the north of Mexico, Yucatan lacked a sizable middle class capable of joining with disgruntled hacendados to lead the revolution. Henequen's legacy was a plantation society with a class structure similar to the sugar societies of the Caribbean."

<sup>25</sup> Wells (1985, 91-92, 94), whose apt term for this indirect effect of henequen development is "economic suction". See also Strickon (1965, 59) and Appleby (1976, 292-293), referring specifically to Yucatan. For similar instances of inter-regional symbiotic dyads linking funnel-like, food-deficit exporting regions with food-supplying regions, see Smith's (1977, 100ff.) remarks on western Guatemala (coffee in the lowlands, food production in the highlands); De la Peña (1981b): sugar in the lowlands, food in the highlands. These "symbiotic dyads" throw us back onto the original question of what constitutes a region. De la Peña (1981 b 29), for example, refers to the Morelos highlands as themselves constituting a distinct region historically differentiated from the neighboring lowlands, while Wells (1985, 7-9) opts for the idea of an "intra-regional dependency" within an identifiable Yucatan region composed of "dominant" and "marginal" sub-regions.

<sup>26</sup> See also Appleby (1976, 294, 302-303). As far as I can tell, no thorough historical study of the marketing structures of these two Yucatecan regions has as yet been made, so that my conclusions and those of other writers are highly tentative.

<sup>27</sup> Morin (1979, 144). The evidence Morin adduces regarding the salt trade in another passage (147) to prove the high degree of commercialization in the bishopric *vis a vis* external markets is not convincing, since salt, even in the ancient world and even in non-monetarized economies, was a commodity of traditional long-range trade because of its high unit/value-if anything were to be traded, salt would be. Of cotton production, however, the largest part was exported from the bishopric (145). One of the problems with Morin's book, good as it is, is precisely his failure to differentiate sufficiently coherent regions within the bishopric of Michoacán, which as an entity in and of itself is virtually meaningless. Nonetheless, the tentative statements here about regions based on Morin's work seem justified on the grounds that since most of the data embrace the bishopric as a whole, and since the whole is unlikely to have exceeded the sum of its parts, his figures represent, *grosso modo*, the performance of the component regions.

<sup>28</sup> Morin (1979, 153). The presence or absence of market periodicity in central-place systems is important because it is an indicator of the nature and degree of intra-regional urban hierarchy, of the degree of consumer choice, and of the degree of lateral linkage at lower and intermediate levels of the hierarchy. For a discussion of periodicity and its importance, see the various works of Smith already cited, and various of the essays in her edited collection, *Regional Analysis*, especially that of G. William Skinner; and also G. William Skinner (1967, 63-97). For a summary of the periodicity argument, see Hassig (1985). Smith's theoretical discussion of solar type central-place systems, which she refers to in one article (1976c) as "administered" or "partially commercialized" marketing structures, though it establishes the essential lineaments for the treatment of empirical cases in Mexico, provides anything but a perfect fit. More generally, her sophisticated

analysis fails to take into account: 1) inter-regional relationships; 2) agrarian societies/regions in which staple crop production is not in the hands of peasant producers (i.e., where it is dominated by haciendas and plantations); 3) intra- and inter-regional differentiation over time (i.e., her analysis is static). As to solar central-place systems, they are not incompatible with the existence of a certain amount of market periodicity, though they are characterized by a truncated (generally two-tiered) urban hierarchy and a marked degree of regional urban primacy.

<sup>29</sup> Van Young (1978, Table 11-3,518); the source is the Biblioteca Pública del Estado (Guadalajara), Archivo Fiscal de la Audiencia de Nueva Galicia, vol. 218; the peso values are derived from *alcabala* (sales tax) figures, not including real estate (*fincas*) and annual lump-sum payments (*iguales*), and assume a collection rate of 6 percent. By contrast with the Guadalajara region, one of the unique peculiarities of the Bajío at the same period was its less skewed urban network, which displayed a lognormal size distribution of its towns; Wibel and de la Cruz (1971); and see also Moreno Toscano (1978); and Morse (1986).

<sup>30</sup> For a general statement of solar regional structure, see Smith (1976b, I, 3-63, especially 36ff). Smith lays some stress on the fact that ..... peasant communities in ... [primate city] ... hinterlands each specialize in a distinctive market commodity .... " In the Guadalajara region specialization certainly existed, but how one would measure its relative significance remains a moot question.

<sup>31</sup> Abascal's report is published in Florescano and Gil Sánchez (1977, 108-132): "Provincia de Guadalajara. Estado que demuestra los frutos ... en el año de 1803 .... " It is probably based on tithe records and sales tax returns. I have rearranged Abascal's figures and done some calculations of my own to derive a rough breakdown of regional production and trade on the basis of several sectors/ industries of the economy, as follows (figures are rounded to nearest thousand pesos):

	1	2	3	4	5	6	7
Agriculture	3,051,000	151,000	904,000	753,000	25	9	
Livestock	1,341,000	—	261,000	261,000	19	3	
Industry	1,320,000	69,000	624,000	555,000	42	6	
Hides/Lea.	407,000	128,000	199,000	71,000	17	1	
Textiles	1,620,000	136,000	308,000	172,000	11	2	
Minerals	990,000	12,000	884,000	872,000	88	10	
	8,729,000	496,000	3,180,000	2,684,000			

- 1) Ramo (sector/industry),
- 2) Value of total production,
- 3) Total value of imports,
- 4) Total value of exports,
- 5) Net value of exports,
- 6) Net value of exports as % of production,
- 7) Net value of exports as % total of production.

[end p. 30]

Precisely what Abascal meant by the designation "Provincia de Guadalajara" is not clear, but it is probably coterminous with the Intendancy, a larger unit which overlapped the Guadalajara region proper as I have tried to define it elsewhere (Van Young, 1981 11-27); my calculations are thus only a rough approximation. Furthermore, of course, the figures do not take into account contraband into and out of the region. Abascal gives a figure for "*comercios*" under his rubric "imports" of 2,241,000 pesos, but it is clear from the totals that this is a different figure from the total imports specified under the categories agriculture, livestock, and so on, and must have consisted of manufactured goods. It is justifiable, therefore, to leave this figure out of the calculations when deriving net exports (gross exports less gross imports in all ramos except comercio). Subtracting the value of "*comercio*" (2,241,000 pesos) from that of net exports (2,684,000 pesos) gives a number 443,000 pesos, the total positive trade figure for the year. This figure was then divided by the "gross regional product" (8,729,000 pesos) to produce the positive trade balance of 5 percent of GRP, assuming a regional population of about 500,000 (possibly a bit on the conservative side); for population, see Van Young (1981, 36-37) and the numbers cited there. As to regional maize production and the role of maize exports in the regional total, my calculations are very rough and ready. Abascal's report gives a total maize production for the "provincia" of 1,860,000 fanegas in 1803, of which some 444,700 fanegas were exported (to what destination is not suggested), or about 24 percent (at 1 peso/fanega). With a total count of about 500,000

people, the actual amount of maize required to feed this population would have been about 1,750,000 fanegas, a little less than Abascal's figure. This calculation supposes an average of 4.5 persons per family, and an average annual family consumption of maize of 15.6 fanegas, for an average annual per capita consumption of 3.5 fanegas. Descriptive and quantitative data for the eighteenth and nineteenth centuries indicate maize consumption at about these levels, with adult men consuming 150-180 kgms. per year and adult women and children rather less. (The daily half-kilo of maize should be compared to bread consumption by contemporary European laborers, who generally demanded one kilo per day). On the other hand, considerations of body size, levels of physical activity, and caloric requirements point in a similar direction as far as consumption levels are concerned. Here there are certain underlying assumptions. Supposing an average Mexican man of the period to measure 1.63 meters in height and to weigh between 55.3 and 65.3 kilos, he would require a daily intake of 2,433 calories; an average adult woman of 1.62 meters in height and between 45.4 and 53.5 kilos in weight would require 1,850 calories daily; an average child under 15 years of age, about 1,800 calories. The total of these caloric minima would amount to a daily family requirement of roughly 9,000 calories, or some 3,285,000 calories per year. Assuming, further, that the family in question would have obtained 75 percent of its caloric requirements from maize (an estimate perhaps on the conservative side), and observing that a kilo of maize supplies about 3,500 calories, we have an annual "maizecal" requirement of about 2,500,000 calories, the equivalent of 708 kilos (15.6 fanegas) of maize.

My calculations are based substantially on Cross (1978), and accord reasonably well with the work of Cook and Borah (1971-1980). The estimates of adult masculine consumption and the percentage of total calories derived from maize are drawn from Nickel (1984), and from Coatsworth (1987). An earlier version of this paper based its maize consumption estimate on the figures of Hassig (1985, 20-21). Various persons brought to my attention the fact that Hassig's figures (about twice the level of those presented here) are improbably high for reasons not altogether clear. If the corrected figure—2,220,000 fanegas—for the total regional production of maize (445,000 + 1,750,000) is closer to the truth, then the quantity exported (445,000 fanegas) falls from 24 percent of total production to about 20 percent. Lower maize consumption on the part of wheat-eaters within the province would probably have been counter-balanced by the use of maize for feeding pigs and other livestock. In this same year, of a total wheat production of 54,287 cargas, the province exported about 20,890 cargas, or some 38 percent. This differential in favor of wheat over maize exports makes sense, if there was an exportable surplus of wheat, since the same transport cost per unit would bring higher earnings to wheat exporters because of the higher average price of that grain. Of the total production of livestock in 1803—1,340,558 pesos in value—approximately 20 percent (260,688 pesos) was exported, but the secular tendency in livestock exports seems to have been toward decline (Van Young, 1981, 47, 70, 82). For a more detailed treatment of late-colonial rural living standards, see Van Young (1992, Chap. 2). For some comparative considerations of material life in colonial Latin America, including much attention to food consumption, see Van Young (1994).

<sup>32</sup> This same point has often been made, most recently by Morse (1986, 80ff); Brading (1986); and Lockhart (1986).

<sup>33</sup> Lindo Fuentes' (1980) excellent article points to the high correlation among the movements of prices in several regions in New Spain based upon presently available price series for the eighteenth century. But he also admits that such apparent sympathetic movements may be due as much to the effects of fortuitous climatological or other non-market factors, as to the arbitraging of prices in inter-regional markets (277). On the other hand, the pressure cooker/solar regional type would be expected to show a marked "sluggishness" or "stickiness" in price responses at best, since such systems are typically subject to non-market (i.e., political) constraints and are by their very nature weakly linked to other regions; on this point see Smith (1976c, 336). My own work on the Guadalajara region (1981, Chaps. 3-5) indicates a relatively late market development almost totally intra-regional in scope, with virtually no introduction of basic food consumption items from outside, even in times of severe crisis. Thus, inferring from a high correlation of basic commodity price

movements that prices were being arbitrated in a large-scale, inter-regional market is like concluding that because two patients have a high temperature they are both suffering from the same disease. Morin (1979, 195-20 I) makes this point very clearly in noting the wide variation of prices from one locality to another within the bishopric, and the stickiness of their movement: "Otros ejemplos podrían confirmar la existencia de mercados locales en los que los precios de presentan en forma anárquica, en desacuerdo con la imagen de un espacio unificado por una red de intercambio en la cuales precios casi no se diferencian más que en función de gastos de transportes. Estos desigualdades revelan una [end p. 31] integración muy defectuosa, pues los intercambios de un lugar a otro no obedecen a la regla de la minimización de los costos y de la máxima utilidad .... " (196). And Morin concludes: "A pesar del volumen del intercambio y de la importancia de los mercados, y con todo y que la actividad comercial se amplía incesantemente, la circulación de bienes ... [falta] ... de los mecanismos de una economía de mercado " (201).

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## **RESUMEN**

La regionalidad se mira como una fuerza principal en el desarrollo económico, político, y social de México. Empezando con la teoría del lugar central, se desarrolla una tipología histórica de espacios regionales mexicanos sobre la base de las regiones solares y dendríticas, relacionado sobre todo con la época colonial y el siglo 19. Se examinan los casos históricos de Yucatán, la zona azucarera de Morelos, Michoacán, y la región de Guadalajara. **[end p. 34]**