

come, these same factors will continue to influence the market positively and sustain the estimate of an overall market growth of 8% through 1994.

TABLE 1
APPARENT CONSUMPTION OF
SAFETY AND SECURITY PRODUCTS
 (US\$000)

	1988	1989	1990	1994p	90-94 GROWTH
Production	21,938	22,314	24,640	28,825	4%
+ Imports	64,094	76,267	105,759	140,684	7.5%
- Exports	5,914	4,982	10,632	7,483	-
TOTAL	80,118	93,599	119,767	162,026	8%

Source: Import-exports data published by secretaría de Comercio y Fomento Industrial (SECOFI).

3.1 DOMESTIC PRODUCTION

Local production of security and safety related products is limited to the more basic types of equipment and systems, with a low value added and which do not require sophisticated technologies, such as gloves, masks, protective clothing, signs for industry, hospitals and highways, cabinets for fire fighting equipment, extinguishers, pipes, etc. In most cases, local manufacturers are representatives of foreign companies or have licensing arrangements with foreign manufacturers. In the case of products incorporating more sophisticated technology, an important part of components is imported and the final product is assembled in Mexico. There are still many types of equipment not produced domestically due to the lack of technological capabilities required. Most domestic manufacturers are located in the Mexico City metropolitan area or in Monterrey, Mexico's third largest city located in the northern state of Nuevo León.

Mexico's exports are concentrated in extinguishing compounds for fire extinguishers, security apparel and gloves, locks, strong boxes, fire extinguishers, safety valves, signaling equipment and ammunition. Exports have fluctuated significantly between 1988 and 1990, decreasing from \$5.9 million in 1988 to \$5 million in 1989, but increasing again in 1990 to \$10.6 million. This is not so much related to fluctuations in production, but rather to re-exports of products imported into Mexico and then sold to other countries, mostly to Latin America.

Following is a list of some local manufacturers of security and safety products: