

and in 1989 it represented 30% of production, followed by PVC (23%), polystyrene (10%) and high density polyethylene (9%) which is now produced by PEMEX.

Exports represent an increasing proportion of domestic production, now estimated at 21%, up from 11% in 1983. Principal exports are PVC (62% of total exports) and polystyrene (15%), as well as ABS and polyethylene terephthalate, which have compensated an insufficient domestic demand for these products.

4. END USER PROFILE

The Mexican plastics industry comprised 2,950 plastic processing companies in 1989 (the last year for which data are available), which together have 116,000 employees. Additionally, there are an estimated 125 manufacturers of raw materials, 110 mould and die manufacturers, 50 distributors of machinery and equipment for the plastics industry, 10 producers of machinery and equipment, 30 recycling companies and 15 primary petrochemical producers.

The Mexican plastics processing industry is very diversified, and large, high technology and productivity firms coexist with very small, family owned businesses: 62% of all firms are microindustries with less than 20 employees, 28% are small with 21-100 employees, 7% are medium with 101-200 employees, and only 3% are large but employ 40% of total labor in the industry. These companies are mostly concentrated in Mexico City and the surrounding area of the State of Mexico (56%), followed by the central region, particularly in Jalisco, Puebla, Querétaro, San Luis Potosí and Guanajuato (22%); the North, in particular Nuevo León and Baja California (20%); and finally the South and Southeast (2%). Additionally, there are some 350-450 maquiladora firms located along the Mexico-U.S. border.

The great majority of companies use injection and extrusion processes, as well as blowing. Injection is gradually being substituted by extrusion and blowing and other more sophisticated processes, such as laminating, rotational moulding, foaming, compression, thermoforming, coating, metalizing, electrochroming, decorating and finishing.

The number of plastics processing companies by type of plastic resin used were as follows in 1988: (no recent data are available)