

COMPETITORS

Most of the world's large multinational chemical producers have operations in Mexico. But small- to medium-sized enterprises (SMEs) continue to play a vital role, especially for specialty chemicals.

Companies located in Mexico supply about 70 percent of Mexico's apparent consumption of chemicals. Mexico is a net importer of chemicals. Imports in 1995 totalled US \$4.7 billion, compared with US \$3.7 billion in exports. Local production was US \$14.8 billion.

All of the large chemical producers in Mexico are members of *Asociación Nacional de la Industria Química (ANIQ)*, National Association of the Chemical Industry. There are 291 companies listed in the *ANIQ* directory for 1996-97. The manufacturing chamber lists about 4,000 companies as part of the chemical sector, but more than 90 percent of them are classified as small or micro.

The *ANIQ* directory includes 530 pages of detail on the activities of each company and also lists producers by commodity. In addition, *ANIQ* publishes an annual statistical report which includes production and trade data for hundreds of individual chemicals.

MULTINATIONAL ENTERPRISES

The industry is dominated by the largest firms. Most larger domestic producers are either wholly-owned or partially-owned by multinational chemical companies or have joint ventures or strategic alliances with foreign firms. The most important producers are Amoco, Bayer, *Infra*, *Cydsa*, *Girsa*, Celanese, Polaroid, Henkel, BASF, Mobil Oil, Kimex, Hoechst, Dupont, Texaco and Union Carbide.

MEXICAN GRUPOS

Many Mexican-owned chemical companies are part of large Mexican *grupos*. *Girsa Corporativo*, for example, operates more than 15 chemical divisions including *Industrias Resistol*. *Girsa* is the chemical division of *Grupo Desc*, a huge conglomerate and Mexico's 22nd largest company.

Several *grupos* operate in partnership with foreign firms. For example, in 1995, *Alpek*, a unit of *Grupo Alfa* acquired the Univex plant in Jalisco, in partnership with Dupont to produce polymerized nylon thread. The two companies have invested more than US \$50 million in joint projects over the past five years. Another *Alfa* unit, *Tereftalatos Mexicanos (Temex)*, has a joint venture with Eastman Chemical to produce polyethylene tereftalate.