

THE SAFETY AND SECURITY SECTOR

Local manufacturers are focused mainly on low-technology products; consulting services are provided mainly by distributors of imported goods.

The safety and security sector includes companies that supply equipment and services for the prevention of personal injury and property damage from occupational crime and fire hazards. The sector includes manufacturers of protective products and technologies, as well as distributors of imported products who also advise on system design, maintenance and operation.

Mexican companies dominate the low-technology end of this sector, but they are mostly dependent on imports for advanced technologies. Although the Spanish word *seguridad*, means both safety and security, Mexicans regard these as two separate markets. Security refers to protection from crime and fraud, sometimes being referred to as *protección* or *vigilancia*. Safety means protection from accidents, sickness and acts of God. In the occupational context, it is known as *seguridad e higiene*.

In Canada, this sector is more fully developed and, therefore, includes more specialized producers. Canadian suppliers to Mexico tend to be small- to medium-sized enterprises focused on niche markets. It is, therefore, useful to divide the Mexican market into three subsectors:

1. **Protection from crime** includes companies that provide security services including consulting and system design as well as on-site security-guard services. It also includes suppliers of a wide range of personal and vehicle protective devices. Mexican firms are strong in the services market, but imported products claim more than three-quarters of the equipment market.
2. **Protection from occupational hazards** includes consultants as well as providers of a wide range of personal protective equipment, testing instruments and monitoring gear. Mexican firms account for more than three-quarters of this market.
3. **Protection from fire** includes companies providing systems to prevent and detect fires as well as equipment to extinguish them. Mexican firms claim about two-thirds of this market.

The market shares shown here are estimates based on interviews with industry participants. There are no reliable statistics to show either the size of the Mexican safety and security market or the penetration of imported products. The published trade statistics do not adequately distinguish between safety-related products and other types. For example, although the harmonized trade