

APPAREL FABRICS

Apparel manufacture is the largest user of textile products. According to U.S. Department of Commerce estimates, each person in Mexico consumed an average of 12 to 14 garments in 1992. This is an increase from seven to nine garments in 1990. Total clothing sales exceeded US \$6 billion in 1992. Real growth of the apparel industry is almost three percent per year.

Clothing manufacturers use about 45 percent synthetic fabrics, 30 percent natural fabrics and 25 percent blends. The domestic garment industry purchases about three-quarters of domestically-produced cotton broadwoven fabrics. Their consumption of imported fabrics is even higher. Women's garments represent the largest share with 54 percent of the market, followed by men's clothing with a 26 percent share.

Women's apparel is strongly influenced by the fashion industry. Every manufacturer strives to produce the latest fashion to attract buyers. These businesses will use local materials or imported ones. Currently, whole cotton products are scarce because the Mexican textile industry primarily produces blends, especially cotton/polyester.

According to interviews conducted for this study, Mexican producers are strongest in cotton and cotton blends, but styles and colours are very limited and it is hard to get anything nonstandard. Natural fabrics are becoming more popular for fashion and other apparel. There is a shift from the low-cost poorer quality synthetics to better quality natural fabrications.

Clothing manufacturers are looking for quality and fashion designs at competitive prices. The ability to offer 60 to 90 day terms is a competitive factor. Service is also becoming more important. Asian suppliers have a reputation for not delivering on time, not meeting quantity commitments and not meeting quality standards. They are also regarded as poor providers of after-sales service.

RETAIL FABRICS

Retailers report that cotton knit fabrics are the most popular for both household and apparel use. Cotton mixed with nylon or microfibres has proven particularly popular, especially the 65/35, 80/20 blends. Some of the most popular blends are 9/90, 12/90, and 18/90.

A fabric known in Mexico as *tergal*, which is a type of voile, is very popular. It traditionally has come mainly from France, but reportedly, Canadian-made voile is now being sought as an alternative. Customers who purchased the Canadian product were very pleased with it, although they commented that they have had difficulty finding Canadian suppliers.