

Tools operated either manually, electrically or hydroneumatically and electrical measurement equipment also increased, from \$4.3 million to \$6.5 million, showing an increase of 52.7%.

Products in this market subsector which have been identified as having the greatest market potential in the years to come are:

- Scanners with adaptability for different types of cars
- Injection balancing equipment washers
- Scanners for computerized braking systems and automatic gearboxes
- Oscilloscopes with injection analyzers
- Time lamps with phasing systems
- Cylinder leak analyzers
- Vacuum gauges and gasoline pump testers

The Association of Automobile Repair Shops (Asociación de Talleres Automotrices) believes that a good deal of the future equipment needs will have to be covered by imports, since automobiles will be increasingly sophisticated and will need high technology equipment not manufactured in Mexico. Particularly, it will be necessary to import equipment related to the needs of automobiles which use fuel injection systems and also for the new cars now using unleaded fuel.

Traditionally tools and equipment that are used by shops come from the United States. The U.S. market share has fluctuated between 72% and 84% in the last three years. The predominance of American made equipment is due fundamentally to the predominance of U.S. brand cars in the Mexican market, which need compatible equipment for their tuning and repair service. West German and Japanese equipment account for most of the balance. Canadian products in this market segment are virtually non-existent, as can be seen in Table 8.

TABLE 8
CANADIAN EXPORTS OF MAINTENANCE EQUIPMENT TO MEXICO
(Cdn \$000)

	1988	1989	1990
Wrenches	5	0	1
Jet projecting machines	38	209	2
Jacks & hoists	17	24	71
Other equipment	26	25	27
Gas analyzers	0	4	12
Measuring & checking instruments	87	97	109
Automatic regulating instruments	202	505	1,050
TOTAL	375	864	1,272

Source: Statistics Canada - International Trade Division

4. END USERS