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S U M M A R Y M A R K E T P R O F I L E

The Construction Products Sector in Mexico

THE OPPORTUNITY

The Mexican government's commitment to infrastructure development and an improved standard of living is creating sustained demand for construction activity. As a result, the expansion of the construction industry has consistently outpaced overall economic growth.

The government has recognized that Mexico's dilapidated public infrastructure has constrained economic development. Better roads and ports are



INDUSTRY MARKET PROFILE

The Department of Foreign Affairs and International Trade has prepared a market profile entitled, *Market Profile: Opportunities in Mexico — The Construction Products Market*. The market profile and this summary of the market for **Construction Products** have been researched by Townsend Trade Strategies Inc. and published by Prospectus Inc. under the Access North America Program, along with other sector profiles and summaries on business opportunities in Mexico. The profile's table of contents is listed below. It is available from:

InfoCentre

Tel.: 1-800-267-8376 or (613) 944-4000
Fax: (613) 996-9709
FaxLink: (613) 944-4500

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needed to facilitate trade. Modern energy generation and water and sewage systems are needed to improve the standard of living. The government has intervened in all of these areas. Other government policies are stimulating private sector investment.

The growth of the construction industry has created a strong demand for building materials. In 1993 alone,

purchases of materials by the formal construction sector nearly doubled.

Mexico has traditionally produced its own building materials but domestic manufacturers have not been able to modernize and expand to keep pace with demand. As a result, imports are playing an increasing role in the market, accounting for more than 20 percent of consumption over the last four years.

HIGHLIGHTS

The construction products sector in Mexico offers major opportunities for Canadian companies:

- **construction activity is growing faster than the economy as a whole;**
- **many large scale infrastructure projects are underway;**
- **imports of construction materials and equipment have risen dramatically;**
- **materials and equipment for road construction, water infrastructure, energy generation, housing, commercial development and tourism infrastructure offer the greatest short-term potential;**
- **opportunities will develop in maritime and airport construction, railways, and communications infrastructure; and**
- **Mexican companies are looking for construction technologies that can decrease construction time and cost but are adaptable to Mexican culture and taste.**



OVERVIEW OF THE SECTOR

The Mexican construction industry employs two million workers in approximately 18,000 companies. The industry is dominated by a few large companies. Fewer than two percent of construction companies account for 55 percent of industry activity. A few of the largest firms have sales in the order of US \$1 billion per year and operate internationally as well as domestically.

In the past few years, construction activity has focussed primarily on infrastructure improvements, with the greatest activity in the following sub-sectors:

- roads and highways;
- water infrastructure;
- the energy sector;
- housing; and
- tourism.

In addition, significant opportunities are emerging in marine ports, airports, railways, industrial plants, and commercial development.

There is a large informal residential construction sector, consisting of very small unregistered contractors and owner-builders. More than half of home construction activity is believed to be in the informal sector.

THE ROLE OF IMPORTS

Imports have not traditionally been a major source of building materials in Mexico, but this is beginning to change. Imports of building materials have increased sharply over the past few years and import penetration has now reached 20 percent.

Several forces are at work. First, tariff reductions and currency stability have reduced the cost of imports. Second, the domestic industry has been unable to meet the rapidly growing demand. Finally, domestic production tends to be limited to a relatively small number of products, and quality and availability are often inadequate. Imported products offer a wider choice of alternatives and

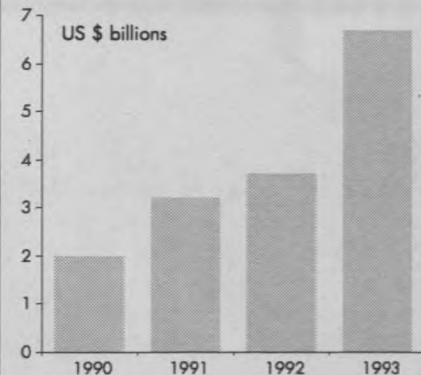
more reliable supply. This is particularly true of decorative items.

The United States dominates the market for imported building materials, with an import market share of more than 70 percent. Competitive factors favouring U.S. manufacturers include the proximity to the market and familiarity of U.S. brand names. In certain products, Italy, Germany, Japan, Sweden and Spain successfully compete with U.S. imports.

Canadian producers of building materials have not achieved substantial penetration of this market. In 1993, exports amounted to just under \$20 million*, while imports from Mexico totalled almost \$75 million.

*Note: Unless otherwise specified, currency used is Canadian dollars.

PURCHASES OF CONSTRUCTION MATERIALS BY THE FORMAL CONSTRUCTION SECTOR



Source: Compiled from a series of publications; Instituto Nacional de Estadística, Geografía e Informática (INEGI), National Institute for Statistics, Geography and Informatics.

UNDERSTANDING MEXICAN TASTES

Understanding Mexican tastes is essential to success in the construction industry. Cultural factors, the natural environment, and growing demand for high-quality interior finishes all play critical roles.

In residential construction, there is a strong preference for brick and cement-based products and a general prejudice against wood. To a large extent, these preferences are based on concerns about earthquakes, fire, termites and other hazards of nature, but the predominance of owner-built homes is also a major factor. Such homes are typically built a little at a time, and concrete and bricks can be left exposed as the builder finishes the project. There are also concerns that wood does not have a Mexican look.

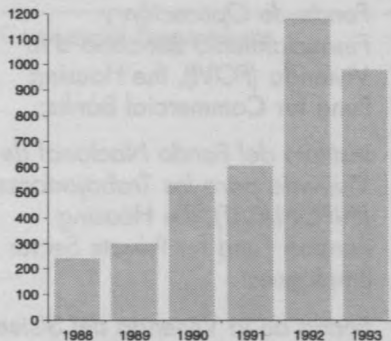
Wood is used for roofs, interior walls and finished surfaces, but the lack of skilled carpenters has limited these applications. The *Consejo Nacional de la Madera en la Construcción*, the National Advisory Board for Wood in Construction, now offers a training program in wood building techniques.

In commercial construction, the most common materials are concrete, steel, glass, paving tile and cement blocks, followed by wood. There is a trend towards the use of advanced technologies and special materials, especially in Mexico City, which is subject to earthquakes. The influx of foreign investors has created a demand for top-quality office space in the major urban centres. This is creating a market for high-quality interior finishing products.

The state-of-the-art in office space is an "intelligent building" which boasts energy-efficient materials, telecommunications channels, automated control systems for temperature and ventilation, controlled-access security systems, centralized maintenance and cleaning, clear signage and emergency systems. There are only eight "intelligent buildings" in Mexico, but this is considered a major growth area.

BUILDING PRODUCTS IMPORTS

US \$ billions



Source: Compiled from a series of publications; Instituto Nacional de Estadística, Geografía e Informática (INEGI), National Institute for Statistics, Geography and Informatics.

CUSTOMERS

The largest customers for construction and building products in Mexico are construction companies and government entities, including state-owned corporations. There is also a large informal market catering directly to household consumers.

Construction Companies

The large companies are the most important users of imported construction materials. They purchase the most sophisticated products and demand a wide variety of materials. Key companies include:

- Grupo Ingenieros Civiles Asociados (ICA);
- Grupo Bufete Industrial;
- GUTSA Construcciones;
- Grupo Mexicano de Desarrollo; and
- Triturados Basálticos y Derivados (TRIBASA).

Governments

Federal, state and municipal governments undertake extensive public works projects, and they are major customers for construction materials and equipment. In 1992, publicly-funded works accounted for over 70 percent of the country's formal construction activity.

Privatization policies, however, have begun to diminish the role of government in materials purchases.

Government procurements are now being re-oriented towards complete turn-key projects. This means that in many cases, government planners no longer play a key role in the specification or procurement of materials. Nonetheless, many construction projects are still designed and managed by government planners, and government entities will continue to play an important role in the building materials industry.

In addition to government departments, two *paraestatal* corporations play a particularly important role in construction activity:

- *Petróleos Mexicanos (PEMEX)* is Mexico's state-owned oil company. PEMEX is a major builder of petrochemical plants, waste-treatment plants and pipelines.
- *Comisión Federal de Electricidad (CFE)* is the public corporation responsible for providing all of Mexico's electrical power. It is undertaking an aggressive modernization program to expand its generating capacity by 50,000 MW, building new power plants and transmission lines.

The Informal Market

The consumer market for construction products, often referred to as the informal market, is difficult to quantify, but it is believed to be larger than the formal market. The informal market includes construction performed by very small, non-registered construction companies as well as individual home owners who do their own house building, repairs, maintenance and remodelling. The U.S. Department of Commerce has estimated that the formal market represents 40 percent of the activity and the informal market 60 percent.

OPPORTUNITIES IN ROADS AND HIGHWAYS

In 1989, the federal government initiated a program to construct 15,000 km of new four-lane highway by the year 2000. Over 3,000 km have been built and approximately 2,000 km are currently under construction. The program involves considerable private-sector investment through a toll road concession scheme. Typically, the projects are undertaken and financed by very large Mexican companies.

The most important opportunities are for the sale of:

- heavy equipment;
- paving equipment and materials;
- bridge-building technologies and materials;
- geo-textile materials and technologies for preparing road beds;
- asphalt protection products;
- foundation stabilizing chemicals;
- traffic lights; and
- guard rails.

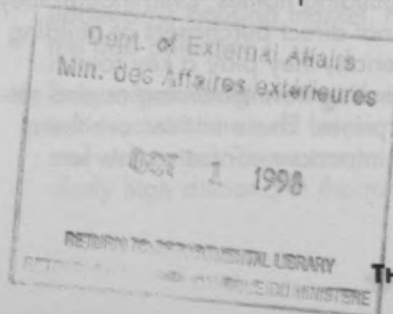
Key Customers

Only a small number of firms have taken part in the highway concession program. These are the largest Mexican construction companies with considerable resources and experience. Canadian suppliers to the road building industry should make direct contact with these companies' purchasing departments to offer construction products. They include:

- *Triturados Basálticos y Derivados (TRIBASA)*;
- *Grupo Ingenieros Civiles Asociados (ICA)*;
- *Grupo Mexicano de Desarrollo*; and
- *Grupo Protexa*.

OPPORTUNITIES IN WATER INFRASTRUCTURE

There are substantial opportunities in the construction of water works as Mexico moves to upgrade, rehabilitate and expand its infrastructure. The National Drinking Water and Sewage Program was launched in 1990. It



included plans to increase the population provided with drinking water and sewage services by three million people per year. It also contemplates treating all residual water of domestic origin in urban centres before the end of the decade.

Significant opportunities exist for the export of:

- heavy equipment;
- motors, pipes and pumps for potable water and sewage systems;
- water treatment technology, engineering services and equipment; and
- laboratory equipment for water testing.

Key Customers

The government agency responsible for administration of water projects is the *Comisión Nacional del Agua (CNA)*, National Water Commission. The CNA is responsible for major purchases of materials and equipment. All motors, piping, pumps, machines and equipment are purchased centrally through its office in Mexico City. Purchases of administrative supplies and services are handled by its regional offices in the 32 states.

OPPORTUNITIES IN THE ENERGY SECTOR

The two key players in Mexico's energy sector are *Petróleos Mexicanos (PEMEX)*, the state-owned oil company, and the *Comisión Federal de Electricidad (CFE)*, the Federal Electricity Commission. Their combined construction budgets exceed US \$2 billion per year. Their needs for materials and equipment include the following:

PEMEX

- materials used in the construction of petrochemical plants;
- tubing for pipelines;
- valves, pumps, and instrumentation;
- pollution control equipment; and
- drilling equipment.

CFE

- turbines;
- control systems;
- materials for the construction of generation plants;
- equipment and materials related to transmission and distribution;
- cable-pullers;
- substation construction materials and equipment; and
- pollution control equipment.

OPPORTUNITIES IN HOUSING

Housing construction in Mexico averages 650,000 units per year. Roughly half of these units are constructed by the informal housing market, usually by the owner, often without title to the land. The remainder is built by the formal construction market either through government-assisted programs for low-income housing or private development for middle and upper-class dwellings.

Mexico has a serious shortage of housing and this has led to a tremendous demand for housing construction materials and services. The best prospects for sales in this sector include:

- prefabricated structures;
- decorative and finishing products;
- hardware;
- aluminum and wood doors and windows;
- kitchen and bathroom fixtures;
- domestic plumbing products;
- locks and security systems;
- coating materials for weather proofing;
- roofing materials; and
- carpets, flooring and curtains.

Key Customers

Under Mexico's new housing initiative, government agencies provide financing for residential construction but they are no longer responsible for building homes. Even though they are not direct purchasers of building materials, they play a key role in promoting new technologies and setting prices. These entities are therefore important contact points for

learning about future housing development plans and introducing new building concepts. The major entities are the following:

- *Fondo de Operación y Financiamiento Bancario a la Vivienda (FOVI)*, the Housing Fund for Commercial Banks;
- *Instituto del Fondo Nacional de la Vivienda para los Trabajadores (INFONAVIT)*, the Housing Pension Fund for Private Sector Employees;
- *Fondo de la Vivienda del Sistema de Seguridad Social de los Trabajadores del Estado (FOVISTE)*, the Housing Pension Fund for Public Sector Employees; and
- *Fondo Nacional de Habitaciones Populares (FONHAPO)*, the Federal government's low-income housing agency.

OPPORTUNITIES IN TOURISM

Mexico's tourist industry is expanding and there has been considerable construction activity involving hotels, marinas, shopping centres, condominiums, and golf courses. There is also a demand for infrastructure to support these facilities, including airports, water treatment plants, roads and electrical distribution systems. Hotel construction is particularly active. Approximately 10,000 new hotel rooms are constructed annually, and a large proportion are four and five-star quality.

Opportunities for construction materials and equipment include:

- high-quality finishing materials for luxury hotels and conference centres;
- bathroom fixtures and plumbing materials;
- lighting fixtures;
- systems for heating, security and control; and
- chemically-treated lumber for landscaping, piers, and docks.



OTHER PRODUCTS IN DEMAND IN THE MEXICAN CONSTRUCTION INDUSTRY

Subsector	Products Demanded
Commercial Development	<ul style="list-style-type: none"> • steel beams • reinforcing bars • forms for concrete • hydraulic concrete mixers • scaffolding • electrical transformers • plywood • cable • air conditioners and ducting • specially windows and doors • lighting fixtures • passenger elevators and electric stairways • "intelligent building" wiring • high quality interior finishings
Ports	<ul style="list-style-type: none"> • cargo handling equipment • materials for warehousing • construction materials for improving infrastructure around ports (roads, sewage, energy transmission)
Railroads	<ul style="list-style-type: none"> • rails and sleepers
Industrial Plants	<ul style="list-style-type: none"> • pollution control systems • industrial safety equipment and materials

Key Customers

The *Fondo Nacional de Fomento al Turismo (FONATUR)*, National Tourism Development Fund, is an important government contact for learning about future tourism development plans. Canadian firms can begin by examining *FONATUR's* plans for new resorts. Contacts within the agency may provide introductions to private-sector developers who are engaged in the major projects. Other groups influencing the choice of construction materials are:

- *Grupo Situr*, a major Mexican company responsible for an estimated 30 percent of new tourism developments;
- major hotel chains;
- local tourism developers; and
- the Mexican architectural community.

MARKET ENTRY STRATEGIES

Mexican construction companies and distributors of construction materials suggest that Canadian suppliers seeking to enter the market consider the following points:

- the greatest opportunities exist for high value-added, unique products for which transportation costs represent a low portion of landed cost. The major competition is from southern U.S. suppliers, and Canadian products will have to overcome a cost disadvantage;
- decorative and finishing items offer significant export opportunity. Wall, roof and floor coverings, hardware, doors and windows geared toward the middle and upper-class housing market, have the best potential;
- unique technologies, that decrease construction time and lower costs, are welcomed. These are in particularly high demand in the road

and housing construction sectors. Companies will have to consider the training element of introducing new products. Mexican skills are based on traditional masonry construction techniques. Canadian exporters must transfer the necessary building skills along with new construction technologies;

- Mexican construction companies perceive Canada to be a producer of superior quality wood and steel products, two markets which are currently underserved by domestic suppliers; and
- new environmental legislation has an impact on all areas of construction. Pollution control systems and environmentally-safe building technologies are in high demand.

WHERE TO GET HELP

KEY CONTACTS IN CANADA

The **Department of Foreign Affairs and International Trade (DFAIT)** is the Canadian federal government department most directly responsible for trade development. The **InfoCentre** is the first contact point for advice on how to start exporting; it provides information on export-related programs and services; helps find fast answers to export problems; acts as the entry point to DFAIT's trade information network; and can provide companies with copies of specialized export publications.

InfoCentre

Tel.: 1-800-267-8376 or
(613) 944-4000
Fax: (613) 996-9709
FaxLink: (613) 944-4500

The **Commercial Division of the Embassy of Canada** in Mexico City promotes trade with Mexico. There are several trade commissioners at the Embassy, and there is a satellite office in Monterrey. Trade Commissioners can provide a range of services including introducing Canadian companies to potential customers in Mexico, advising on



marketing channels, assisting those wishing to participate in trade fairs, helping identify suitable Mexican firms to act as agents, and compiling credit and business information on potential foreign customers.

Note: to telephone Mexico City, dial: 011-52-5 before the number shown below. For contacts in other cities in Mexico, consult the international code listing at the front of your local telephone directory for the appropriate regional codes or contact the international operator.

Commercial Division
The Embassy of Canada in Mexico
Schiller No. 529
Col. Polanco
Apartado Postal 105-05
11560 México, D.F.
México
Tel.: 724-7900
Fax: 724-7982

Canadian Business Centre
Centro Canadiense de Negocios
Av. Ejército Nacional No. 926
Col. Polanco
11540 México, D.F.
México
Tel.: 580-1176
Fax: 580-4494

Canadian Consulate
Edificio Kalos, Piso C-1
Local 108A
Zaragoza y Constitución
64000 Monterrey, Nuevo León
México
Tel.: 344-3200
Fax: 344-3048

International Trade Centres have been established across the country as a convenient point of contact to support the exporting efforts of Canadian firms. Co-located with the regional offices of Industry Canada (IC), the centres operate under the guidance of DFAIT and all have resident Trade Commissioners. They help companies determine whether or not they are ready to export; assist firms with marketing research and market planning; provide access to government programs designed to promote exports; and arrange for assistance from the Trade Development Division in

Ottawa and trade officers abroad. Contact the International Trade Centre nearest you.

The **World Information Network for Exports (WIN Exports)** is a computer-based information system designed by DFAIT to help Canada's trade development officers abroad match foreign needs to the capabilities, experience and interests of more than 30,000 Canadian exporters. To register on WIN Exports, call: (613) 996-5701.

The **Market Intelligence Service** provides Canadian business with detailed market information on a product-specific basis. The service assists Canadian companies in the exploitation of domestic, export, technology transfer, and new manufacturing investment opportunities. The intelligence is used by Canadian business in decisions regarding manufacturing, product development, marketing, and market expansion. The information includes values, volume and unit price of imports, characteristics of specific imports (e.g. material, grade, price, range, etc.), names of importers, major countries of export, identification of foreign exporters to Canada, Canadian production, Canadian exports, and U.S. imports. Two-thirds of the clientele for this service are small businesses. Call: (613) 954-4970.

Canadian International Development Agency

An important possible source of financing for Canadian ventures in Mexico is the special fund available through the Canadian International Development Agency (CIDA) under the Industrial Cooperation Program or CIDA/INC. CIDA's Industrial Cooperation Program provides financial contributions to stimulate Canadian private-sector involvement in developing countries by supporting long-term business relationships such as joint ventures and licencing arrangements. INC supports the development of linkages with the private sector in Mexico encouraging Canadian enterprises to share their skills and experiences with partners in Mexico, and other countries. A

series of INC mechanisms help enterprises to establish mutually beneficial collaborative arrangements for the transfer of technology and the creation of employment.

Industrial Cooperation Division
Canadian International Development Agency
200, Promenade du Portage
Hull, PQ K1A 0G4
Tel.: (819) 997-7905/7906
Fax: (819) 953-5024

Export Development Corporation (EDC)

EDC is a unique financial institution that helps Canadian business compete internationally. EDC facilitates export trade and foreign investment by providing risk management services, including insurance and financing, to Canadian companies and their global customers.

EDC's programs fall into four major categories:

- export credit insurance, covering short and medium-sized credits;
- performance-related guarantees and insurance, providing coverage for exporters and financial institutions against calls on various performance bonds and obligations normally issued either by banks or surety companies;
- foreign investment insurance, providing political risk protection for new Canadian investments abroad; and
- export financing, providing medium and long-term export financing to foreign buyers of Canadian goods and services.

Ottawa (Head Office)
151 O'Connor Street
Ottawa, ON K1A 1K3
Tel.: (613) 598-2500
Fax: (613) 237-2690

Public Information
Tel.: (613) 598-2739

The **Embassy of Mexico**, Mexican Trade Commissioners in Canada, and Mexican consulates can provide assistance and guidance to Canadian

companies in need of information about doing business in Mexico.

Embassy of Mexico
45 O'Connor Street, Suite 1500
Ottawa ON K1P 1A4
Tel.: (613) 233-8988
Fax: (613)235-9123

International Financial Institutions including the World Bank and the Inter-American Development Bank provide funds to Mexico for a wide variety of specific projects. These banks can provide details of upcoming projects and identify the Mexican executing agencies.

Business and Professional Associations

Canadian Construction Association (CCA)

85 Albert Street
Ottawa, ON K1P 6A4
Tel.: (613) 236-9455
Fax: (613) 239-9526

Association of Consulting Engineers of Canada (ACEC)

130 Albert Street, Suite 616
Ottawa, ON K1P 5G4
Tel.: (613) 236-0569
Fax: (613) 236-6193

Royal Architectural Institute of Canada (RAIC)

55 Murray Street, Suite 330
Ottawa, ON K1N 5M3
Tel.: (613) 232-7165
Fax: (613) 232-7559

Canadian Standards Association (CSA)

178 Rexdale Blvd.
Rexdale, ON M9W 1R3
Tel.: (416) 747-4000
Fax: (416) 747-4149

Standards Council of Canada

45 O'Connor Street
Suite 1200
Ottawa, ON K1P 6N7
Tel.: (613) 238-3222
Fax: (613) 995-4564

KEY CONTACTS IN MEXICO

Mexican Government Departments and Agencies

Secretariat of Communications and Transportation

Secretaría de Comunicaciones y Transportes (SCT)
Av. Universidad y Xola, Cuerpo C
Piso 1
Col. Narvarte
03028 México, D.F.
México
Tel.: 538-5148/0450
Fax: 519-9748

National Water Commission Office of Construction Management

Comisión Nacional del Agua (CNA) Gerencia de Construcciones
Cda. J. Sánchez Azcona No. 1723
Col. del Valle
03100 México, D.F.
México
Tel.: 524-6985, 534-4650
Fax: 524-1129

National Oil Company

Petróleos Mexicanos (PEMEX)
Av. Marina Nacional No. 329
Col. Huasteca
11311 México, D.F.
México
Tel.: 250-2611
Fax: 652-4385

Federal Electricity Commission

Comisión Federal de Electricidad (CFE)
Río Ródano No. 14
Col. Cuauhtémoc
06598 México, D.F.
México
Tel.: 553-7133
Fax: 553-6424

Secretariat of Social Development

Subsecretariat of Housing

Secretaría de Desarrollo Social (SEDESOL)
Subsecretaría de la Vivienda
Av. Constituyentes No. 947
Col. Belén de las Flores
01110 México, D.F.
México
Tel.: 271-1441
Fax: 271-1659

Housing Fund for Commercial Banks

Fondo de Operación y Financiamiento Bancario a la Vivienda (FOVI)
Av. Ejército Nacional No. 180
Col. Anzures
11590 México, D.F.
México
Tel.: 255-3644
Fax: 203-7304

Housing Pension Fund for Private Sector Employees

Instituto del Fando Nacional para la Vivienda de los Trabajadores (INFONAVIT)
Barranca del Muerto No. 280
Col. San José Insurgentes
01029 México, D.F.
México
Tel.: 660-2779
Fax: 660-3418

Housing Pension Fund for Public Sector Employees

Fondo de la Vivienda del Sistema de Seguridad Social de los Trabajadores (FOVISSSTE)
Miguel Noreña No. 28
Col. San José Insurgentes
03900 México, D.F.
México
Tel.: 680-6142
Fax: 680-1574

Federal Low Income Housing Fund

Fondo Nacional de Habitaciones Populares (FONHAPO)
Homero No. 203, Piso 10
Col. Polanco
11560 México, D.F.
México
Tel.: 254-8765
Fax: 254-7559

National Tourism Development Fund

Fondo Nacional de Fomento al Turismo (FONATUR)
Insurgentes Sur No. 800
Col. del Valle
03100 México, D.F.
México
Tel.: 687-7437, 688-4222
Fax: 687-8001





School Construction Program
*Comité Administrativo del Programa
 Federal de Construcción de Escuelas
 (CAPFCE)*
 Calle Vito Alessio Robles No. 380
 Col. Florida
 01030 México, D.F.
 México
 Tel.: 659-5896, 557-1757
 Fax: 554-6685/6422

**Federal Roads and Bridges
 Commission**
*Caminos y Puentes Federales
 de Ingresos y Servicios Conexos
 (CAPFISC)*
 Av. Plan de Ayala No. 629
 Col. Lomas del Mirador
 62350 Cuernavaca, Morelos
 México
 Tel.: 11-5400
 Fax: 16-0519

**Secretariat of Commerce and
 Industrial Development
 Bureau of Standards**
*Secretaría de Comercio y Fomento
 Industrial (SECOFI)*
Dirección General de Normas
 Av. Puente de Tecamachalco No. 6
 Col. Lomas de Tecamachalco
 53950 Tecamachalco
 Estado de México
 México
 Tel.: 729-9300
 Fax: 729-9477

Mexican National Railways
*Ferrocarriles Nacionales de México
 (FERRONAL)*
 Jesús García No. 140
 Piso 13, Ala A
 Col. Buenavista
 06358 México, D.F.
 México
 Tel.: 541-4004, 547-9317
 Fax: 547-0959

Mexican Airport Authority
*Aeropuertos y Servicios Auxiliares
 (ASA)*
 Avenida 602 No. 161
 Col. San Juan de Aragón
 15620 México, D.F.
 México
 Tel.: 571-4545/4911
 Fax: 762-5951

Mexican Port Authority
Puertos Mexicanos
 Municipio Libre 377, Piso 6, Ala A
 Col. Santa Cruz Atoyac
 03310 México, D.F.
 México
 Tel.: 604-7875, 688-2266
 Fax: 688-9081

**National Institute for Statistics,
 Geography and Informatics**
*Instituto Nacional de Estadística,
 Geografía e Informática (INEGI)*
 Edificio Sede
 Av. Héroe de Nacosari 2301 Sur
 Fraccionamiento Jardines del Parque
 20270 Aguascalientes
 Aguascalientes
 México
 Tel.: 918-6947
 Fax: 918-6945

**Business and Professional
 Associations**

**National Chamber of the
 Construction Industry**
*Cámara Nacional de la Industria de
 la Construcción*
 Periférico Sur No. 4839
 Col. Parques del Pedregal
 14010 México, D.F.
 México
 Tel.: 665-0424/1500
 Fax: 606-6720

**Promotion Centre for
 Construction and Housing**
*Centro Impulsor de la Construcción y
 la Habitación A.C. (CIHAC)*
 Av. Minerva No. 16
 Col. Crédito Constructor
 03940 México, D.F.
 México
 Tel.: 661-0844, 662-5085
 Fax: 661-0600

**National Association of
 Distributors of Construction
 Materials**
*Asociación de Comerciantes de
 Materiales para la Construcción de
 la República Mexicana A.C.*
 José María Velasco No. 21
 Col. San José Insurgentes
 03900 México, D.F.
 México
 Tel.: 593-4995
 Fax: 593-6047

**Mexican Association of Firms
 Specializing in Installation for
 Construction**
*Asociación Mexicana de Empresas
 del Ramo de Instalaciones para
 Construcción A.C.*
 San Antonio No. 319
 Col. San Pedro de los Pinos
 03800 México, D.F.
 México
 Tel.: 611-5414
 Fax: 611-5456

**National Chamber of
 Commerce of Mexico City**
*Cámara Nacional de Comercio de
 la Ciudad de México (CANACO)*
 Paseo de la Reforma No. 42
 Col. Centro
 06030 México, D.F.
 México
 Tel.: 592-2677/2665
 Fax: 705-7412, 592-3571

**National Chamber of Industrial
 Transformation**
*Cámara Nacional de la Industria de
 la Transformación (CANACINTRA)*
 Av. San Antonio No. 256
 Col. Nápoles
 03849 México, D.F.
 México
 Tel.: 563-3400
 Fax: 598-9467

**Canadian Chamber of
 Commerce in Mexico**
*Cámara de Comercio de Canadá
 en México*
 Paseo de la Reforma No. 369,
 Mezzanine
 Col. Juárez
 06500 México, D.F.
 México
 Tel.: 525-0961/0541
 Fax: 525-0438

National Chamber of Cement
*Cámara Nacional del Cemento
 (CANACEM)*
 Leibnitz No. 77
 Col. Anzures
 11590 México, D.F.
 México
 Tel.: 533-0132/0133/0134
 Fax: 203-4102



National Chamber of the Iron and Steel Industry

Cámara Nacional de la Industria del Hierro y del Acero (CANACERO)
Amores No. 338
Col. del Valle
03199 México, D.F.
México
Tel.: 543-4443 to 4447
Fax: 687-0517

Mexican Cement and Concrete Institute

Instituto Mexicano del Cemento y del Concreto (IMCYC)
Insurgentes Sur No. 1846
Col. Florida
01030 México, D.F.
México
Tel.: 660-2778/3198
Fax: 534-2118

National Advisory Board for Wood in Construction

Consejo Nacional de la Madera en la Construcción A.C.
Quintana Roo No. 141-603
Col. Hipódromo Condesa
06170 México, D.F.
México
Tel.: 564-5007
Fax: 277-6715

Mexican Association of Fibro-Cement Manufacturers

Asociación Mexicana de Fabricantes de Fibro-Cemento A.C.
Paseo de la Reforma No. 30, Piso 1
Col. Juárez
06040 México, D.F.
México
Tel.: 533-4441, 207-2254
Fax: 286-7723

Mexican Association of Plastic Pipe Manufacturers

Asociación Mexicana de Industrias de Tuberías Plásticas A.C. (ITP)
Alabama No. 35
Col. Nápoles
03810 México, D.F.
México
Tel.: 669-0510
Fax: 687-3702

Association of Consulting Engineers

Cámara Nacional de Empresas Consultoras
Miguel Laurent No. 70, Piso 3
Col. del Valle
03100 México, D.F.
México.
Tel.: 559-9888
Fax: 559-4914

School of Architects

Colegio de Arquitectos
Av. Constituyentes No. 800
Col. Lomas Altas
11950 México, D.F.
México
Tel.: 570-0007
Fax: 259-5423

Major Construction Companies in Mexico City

Grupo Bufete Industrial S.A. de C.V.
Moras No. 850
Col. del Valle
03100 México, D.F.
México
Tel.: 659-3555, 726-9066
Fax: 658-5941/3477

Gutsa Construcciones S.A. de C.V.
Av. Revolución No. 1387
Col. Campestre San Angel
01040 México, D.F.
México
Tel.: 662-7346
Fax: 662-2471

Grupo Mexicano de Desarrollo
Culiacán No. 108
Col. Condesa
06170 México, D.F.
México
Tel.: 272-1867
Fax: 272-1627

Ingenieros Civiles Asociados S.A. de C.V. (ICA)
Minería No. 145
Col. Escandón
11800 México, D.F.
México
Tel.: 272-9991

Triturados Basálticos y Derivados S.A. de C.V. (TRIBASA)
Bosques de Ciruelos No. 130
Col. Bosques de las Lomas
11700 México, D.F.
México
Tel.: 596-5023/5121
Fax: 596-5337

Construcciones y Canalizaciones S.A. de C.V. (CYC)
Sor Juana Inés de la Cruz No. 280
Col. Benito Juárez
54020 Tlalnepantla, Estado de México
México
Tel.: 390-4522
Fax: 565-2896

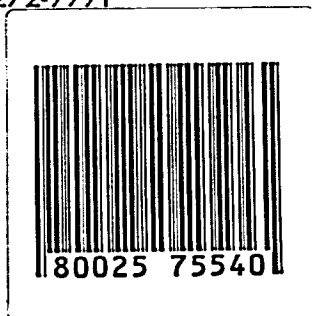
Grupo Contelmex
Liverpool No. 72-A
Col. Juárez
06600 México, D.F.
México
Tel.: 627-5600
Fax: 511-8138

Compañía Contratista Nacional S.A. de C.V.
Arenal No. 550
Col. Tepepan Xochimilco
16020 México, D.F.
México
Tel.: 676-5555
Fax: 676-1932

CCC Fabricaciones y Construcciones S.A. de C.V.
Miguel de Cervantes Saavedra No. 157, Piso 7
Col. Granada
11520 México, D.F.
México
Tel.: 254-0511
Fax: 254-8381

Major Developers

Fondo Opción
Av. Revolución No. 1601
Col. San Angel
01000 México, D.F.
México
Tel.: 227-7227
Fax: 550-3014



Aurum Promociones
Periférico Sur No. 3395 A-201
Col. Rincón del Pedregal
14120 México, D.F.
México
Tel.: 326-7033
Fax: 326-7034

**Major Construction Companies
in Monterrey**

Constructora Maiz Mier S.A. de C.V.
Matamoros Oriente No. 506
64000 Monterrey, Nuevo León
México
Tel.: 343-0321
Fax: 344-0662

*Constructora Garza Ponce S.A. de
C.V.*
Zaragoza Sur No. 1000
Mezzanine
64000 Monterrey, Nuevo León
México
Tel.: 340-7752
Fax: 345-6654

*Desarrollo y Construcciones
Urbanas S.A. de C.V.*
Paricuín 390
Col. Roma
64700 Monterrey, Nuevo León
México
Tel.: 358-4200
Fax: 359-6655

Grupo Protexa S.A. de C.V.
Apartado Postal 2933
Carretera Monterrey - Saltillo
Km. 339
66350 Santa Catarina, Nuevo León
México
Tel.: 336-3030
Fax: 336-2964

Houston Purchasing Office —
IMXPORT
Tel.: (713) 820-3300

*Bufete Industrial de Monterrey S.A.
de C.V.*
Madero No. 1820 Poniente, Piso 2
Monterrey, Nuevo León
México
Tel.: 273-1603
Fax: 372-4907

Promesa Constructora
Av. San Pedro No. 112 Sur
con Río Volga
Col. del Valle
66220 Garza García, Nuevo León
México
Tel.: 335-4216
Fax: 335-0766

**National Chamber of the
Construction Industry for the
State of Nuevo León**

*Cámara Nacional de la Industria de
la Construcción*
Delegación Nuevo León
Av. Dr. I. Morones Prieto Oriente
No. 1101
Col. Nuevo Repueblo
64700 Monterrey, Nuevo León
México
Tel.: 345-6147
Fax: 345-6027

**Nuevo León Association of
Distributors of Construction
Materials**

*Asociación de Distribuidores de
Materiales para Construcción de
Nuevo León A.C.*
Benito Juárez 233
Col. Chulavista
67180 Guadalupe, Nuevo León
México
Tel.: 360-0012/3888
Fax: 360-0012

**National Chamber of
Commerce for the State
of Nuevo León**

Cámara Nacional de Comercio
Delegación Nuevo León
Ocampo Poniente No. 250, Piso 1
Edificio de las Instituciones
64000 Monterrey, Nuevo León
México
Tel.: 344-8144
Fax: 345-6700

Contacts in Guadalajara

Grupo SITUR
Av. Agustín Yañez No. 2343, Piso 3
44100 Guadalajara, Jalisco
México
Tel.: 630-2900
Fax: 615-0734

Urban Engineering:

Urden Construcciones S.A. de C.V.
Morelos No. 530
Col. Fraccionamiento Los Altos
04550 Tlaquepaque, Jalisco
México
Tel.: 635-4746
Fax: 635-4746

**National Chamber of the
Construction Industry
for the State of Jalisco**

*Cámara Nacional de la Industria de
la Construcción*
Delegación Jalisco
Lerdo de Tejada No. 2151
44100 Guadalajara, Jalisco
México
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Fax: 615-2310

**National Chamber of
Commerce for the State
of Jalisco**

Cámara Nacional de Comercio
Delegación Jalisco
Av. Vallarta No. 4095
Fraccionamiento Camino Real
44680 Guadalajara, Jalisco
México
Tel.: 647-3300/3171
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