

# The Textiles Market

## THE OPPORTUNITY

The Mexican textile sector offers important opportunities for Canadian suppliers.

- The Mexican textile industry is unsophisticated and generally unable to produce the more complex products.
- Under the North American Free Trade Agreement (NAFTA), Mexican producers will need to find North American sources of fibre, yarn and fabric.
- In spite of the recent devaluation of the new peso, there are still many niche markets for specialty products, especially those formerly purchased in Europe.
- Engineered textiles are particularly promising because Mexican capacity is limited and demand is derived mainly from industrial requirements.

## THE MEXICAN TEXTILE SECTOR

The textile sector accounts for more than two percent of Mexico's GDP, and almost 10 percent of manufacturing output. The industry is composed of some 2,000 companies of which 95 percent are family-owned.

The textile sector employs about 170,000 people, and is located mainly in Mexico City and Puebla. This industry developed in a strongly protectionist environment over the the past 40 years. In spite of the new pressure to modernize, investment continues to be sluggish.



## FIBRES AND YARNS

Consumption of fibres and yarns is dominated by synthetic and artificial fibres and filaments which account for 64 percent of the market. Cotton accounts for 35 percent and wool for 1 percent.

### Artificial and Synthetic Fibres

Mexico is an important producer of artificial and synthetic fibres. According to the publication *Fiber Organon*, domestic production in 1993 was 431,000 tonnes while net exports stood at 8,600 tonnes. About 70 percent of the synthetic fibre produced in Mexico is in the form of staple and tow, with the remaining 30 percent in filament form.

### Cotton

Mexico was traditionally a very important producer and exporter of cotton. It has excellent growing conditions, but the lack of technology and capital has discouraged the development of a world-class industry. Under the North American Free Trade Agreement (NAFTA), there will be increased demand for cotton fibre and yarns of North American origin, but producers will have to modernize to meet international quality standards.

## SUMMARY REPORT

In addition to this market summary, the Department of Foreign Affairs and International Trade (DFAIT) has prepared a market profile entitled **Opportunities in Mexico: The Textiles Market**. This market information on the Mexican textiles market has been produced and published by Prospectus Inc. under contract with DFAIT, along with other market profiles and summaries on business opportunities in Mexico. It is available from:

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Cat. No. E73-9/31-1995-1E  
ISBN 0-662-23175-9

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## Wool

There is a very limited amount of wool fibre and yarn production in Mexico, despite there being a large demand for carpets, rugs and blankets. Mexico does not produce the fine wools used for fashion apparel. There is no production of cashmere, angora or alpaca. In 1993, domestic wool production was 2,473 tonnes compared with consumption of 7,172 tonnes.

## FABRICS

Mexican companies supply roughly two-thirds of domestic fabric consumption. Production is about two-thirds synthetic and artificial and about one-third cotton. The domestic market for fashion and home decorator fabrics totalled more than US \$800 million in 1993, excluding industrial fabrics. Projected growth for 1994 to 1996 is 8 percent annually.

Knitted fabrics comprise only a small portion of foreign trade in fabrics, and it is likely that this reflects the overall market. Mexico does, however, have significant domestic production of garments knitted directly from yarn.

The weaving industry is made up of about a dozen relatively large manufacturers, mostly affiliated with foreign firms, and a large number of small-scale spinning, weaving and finishing facilities. They are often family-owned.

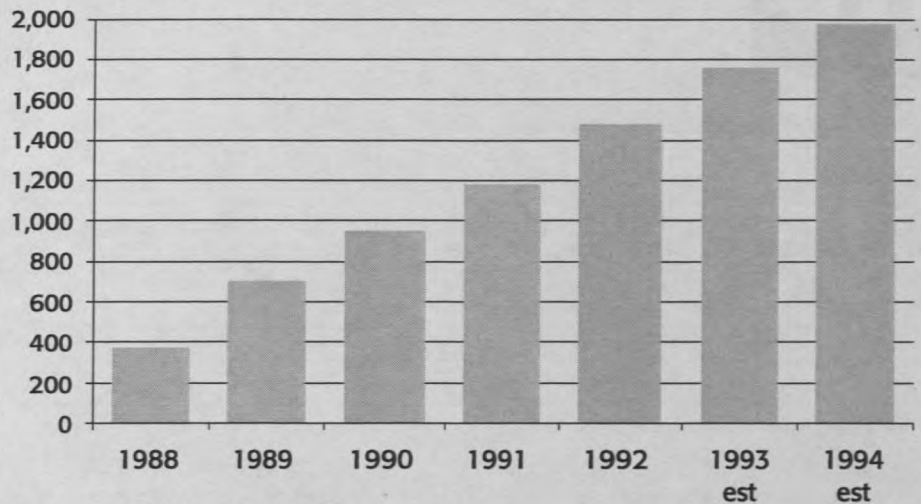
Large Mexican companies that make synthetic fabrics must import many of their yarns because of the limited product range of the Mexican yarn industry. Under the North American Free Trade Agreement (NAFTA), Mexico must find sources of yarn within the free trade area.

## FOREIGN TRADE

In 1993, Mexico's textile imports exceeded US \$1.1 billion. About US \$456 million of this was fabric. Mexico produces most of the basic fabric that it needs, and the imports are mainly finer fabrics for upper-income households and corporate customers.

## Textile Imports to Mexico, 1988-1994

(US \$ millions)



Source: Statistics Canada World Trade Database.

Imports of textile products have increased steadily since Mexico liberalized its import regulations starting in 1988. The U.S. Department of Commerce projects an average of 8 percent growth for the years 1994 to 1996. The data presented here excludes shipments to the *maquiladora* zones.

Much concern has been expressed by Mexican textile industry representatives regarding the current influx of imported products and the future of the industry within the context of the North America Free Trade Agreement (NAFTA). Imported goods are estimated to account for 40 to 50 percent of the Mexican textile market and several textile mills have closed as a result of increased import penetration. In October 1994, the *Secretaría de Comercio y Fomento Industrial (SECOFI)*, Secretariat of Commerce and Industrial Development, formally imposed anti-dumping duties ranging from 54 percent to 331 percent against a variety of Chinese products, including textiles.

The United States accounted for more than half of all of Mexico's imports of textile products in 1992, the most recent year for which detailed statistics are available. More

than 20 percent came from North and South Korea. Hong Kong and Japan were the other major suppliers with market shares of 6 percent and 3 percent respectively. Canada's 1992 import market share was about 1 percent.

Although Canada's textile exports to Mexico are dominated by synthetic fibres and yarns, fabrics are also exported in significant quantities. Canada's 1993 export product mix is shown in the accompanying table, based on data from the *Secretaría de Comercio y Fomento Industrial*

### Mexican Textile Imports from Canada

US \$

Product	1992	1993
Fibres	5,770,969	8,917,611
Yarns	2,290,692	2,565,361
Fabrics	1,944,539	2,273,864
Other Textiles	2,208,369	2,530,568
Total	12,214,569	16,287,404

Source: Derived from *Secretaría de Comercio y Fomento Industrial (SECOFI)*, Secretariat of Commerce and Industrial Development.

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(SECOFI), Secretariat of Commerce and Industrial Development. Fibre and yarn make up 70 percent of the total, fabrics about 14 percent, with the balance spread among several different products.

## CUSTOMERS

### FABRIC MANUFACTURERS

Mexican fabric manufacturers are the largest direct importers of fabric. They tend to distribute their own products and sell directly to end users. They import fabrics to round out their product lines. Fabric manufacturers also purchase imported yarn for their spinning, weaving and knitting operations.

### YARN MANUFACTURERS

Yarn manufacturers import fibre for their spinning operations. In many cases, yarn manufacturing is done by fabric manufacturers who have integrated-spinning operations. A large proportion of Canada's textile exports are destined for these customers. Mexican yarn producers are heavily dependent on imports for such fibres as nylon, rayon and polypropylene.

### APPAREL MANUFACTURERS

Apparel manufacturers account for as much as 70 percent of the domestic market and more than 85 percent of imports. The larger apparel makers prefer to buy direct from Mexican textile manufacturers, who sell both their own and imported fabrics. In the case of imported fabrics, some major producers buy through New York brokers, or direct from foreign textile producers when exclusive lines are involved.

The large integrated companies manufacture most of the yarns and fabrics which they use to make clothing. They are significant importers of fibres and yarn, because they are adept at recognizing fashion trends, and need a wide variety of materials.

## RETAIL STORES

Mexican retail stores play a bigger role in the distribution of textile products than their counterparts in Canada. One reason is that Mexicans are more likely to make their own clothes. In addition, many relatively affluent Mexicans hire seamstresses or tailors to custom-make their clothing. The same points apply to draperies and other home decoration items. Much of this fabric, along with linens, carpets and other household items, is purchased from retail stores. Some retail stores double as distributors.

## INDUSTRIAL CUSTOMERS

Not much is known about the engineered textiles industry in Mexico, but it is believed that there is relatively little production of these products. Mexico imported "technical articles of textile materials" valued at US \$74.4 million in 1993. Canada's exports to Mexico of these products totalled US \$1.8 million or about 2.4 percent of the import market in that year.

## VEHICLE MANUFACTURERS

Seats, headrests, armrests, convertible tops and other automobile parts containing fabric are imported in substantial quantities by Mexican vehicle manufacturers. The Mexican automotive industry is integrated with the operations of foreign multinationals, including the U.S. "Big Three", Nissan and Volkswagen. This market appears to offer few opportunities for imported textiles. There is, however, some demand from the automotive industry for "engineered textiles".

## FURNITURE MANUFACTURERS

Furniture manufacturers purchase a wide variety of yarns, broadwoven fabrics, coated fabrics, knitted fabrics, felts, waddings, non-wovens, braid and other ornamental trimmings. Large, home-furniture manufacturers in Mexico use 80 percent synthetic fabrics, 19 percent blends and 1 percent natural fabrics. According

to one estimate, 30 percent of these textiles are locally made and 70 percent are imported. The larger companies buy direct from producers, but many also purchase from distributors. Significant purchases of imported fabrics are made by *tapiceros*, furniture refinishers, and *cortineros*, curtain makers.

## AGENTS AND DISTRIBUTORS

Many of the customers for imported fabric are small- to medium-sized companies which cannot meet the minimum order sizes imposed by the domestic fabric manufacturers. They tend to buy from independent fabric distributors or agents. These intermediaries usually specialize in imported fabrics because Mexican manufacturers sell mostly through their own agents. Six distributors account for half of the market for apparel, furniture and home decoration.

**Leading Importers and Distributors of Fabrics for Apparel, Furniture and Home Decoration**

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Casa Armand  
Artell  
Casa Bayon  
Telas Junco  
Rosela  
Morel's

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Source: United States Department of Commerce.

## COMPETITION

Mexican textile producers do not generally produce a full range of fabrics, and they are having problems competing with both the higher quality and lower prices of imported fabrics. In association with foreign partners, some domestic producers are upgrading to remain competitive.

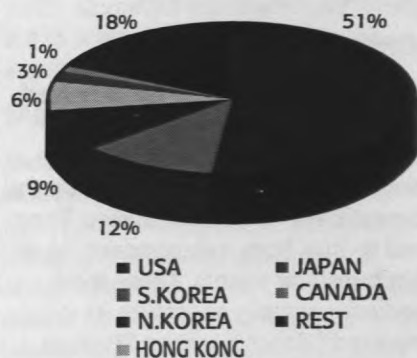
The United States continues to dominate the market, although competition from Hong Kong, Korea,

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Japan and Europe has pushed the U.S. share down in the last few years. India and Brazil have also been promoting cotton and silk yarns and fabrics.

### Textile Import Shares to Mexico, 1992



Source: Statistics Canada World Trade Database.

New relationships among Mexican, U.S. and Canadian manufacturers under the North American Free Trade Agreement (NAFTA) will help to boost the North American share. Mexican manufacturers have to comply with the NAFTA rules of origin if they want to export their products to the U.S. or Canada. Mexico is also erecting trade barriers against some Asian suppliers, especially China.

### Top Fabric Manufacturers

Telas Parras  
Kaltex  
Avante  
Romafil  
Intretex  
Grupo Zaga  
Encajes Mexicanos  
Telas Oxford  
Martex Potosí  
Negociación Fabril de Soria  
Grupo Hytt  
Compañía Industrial Veracruzana  
Sedas Parisina

Source: Cámara Nacional de la Industria Textil (CANAINTEX), National Chamber of the Textile Industry. Interview by Desarrollo Administrativo Integrado (DAI).

## PRODUCT TRENDS

Mexican companies are striving to replace imported textiles with domestic products, especially since the devaluation of the peso. The main opportunities for Canadian companies lie in replacing the high-class European products that the Mexican industry cannot supply and that consumers can no longer afford. Additional opportunities, possibly through joint ventures, are being created by the need to recover the market lost to inexpensive Asian imports.

### APPAREL FABRICS

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.

Mexican producers are strongest in cotton and cotton blends, but styles and colours are very limited and it is hard to get anything which is non-standard. 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.

### RETAIL FABRICS

Retailers report that cotton knit fabrics are the most popular for both household and apparel use. Cotton mixed with nylon or microfibrils 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.

## YARNS

Product trends are towards natural fibres with a shift from low quality/low price to high quality/competitive price. Mexico lacks capacity for dyeing and finishing, creating an opportunity for strategic alliances. A Canadian partner could supply the needed technology while the Mexican firm could provide market knowledge and access.

Under the North American Free Trade Agreement (NAFTA), there will be increased demand for yarns of North American origin. Yarns and filaments available in Mexico are commodity yarns such as cotton, nylon and polyester. This leaves a substantial market for imported yarns.

### ENGINEERED TEXTILES

Engineered textiles are a major exception to the general finding that Canadian textile products are virtually unknown in the Mexican market. Canadians are regarded as having a keen sense of technology, and Mexican observers believe that this knowledge could translate into exports. It was agreed that Canadian companies could penetrate the Mexican market on the basis of a trust in the product, coupled with the high regard in which Canadians are held.

Demand is growing: in part this is due to an awareness of new products. Products with particular demand are:

- medical clothing;
- agricultural tarps/coverings;
- *entretelas* (collar and cuff fillings, suitcase linings, pockets, diaper absorbents etc.);
- mattress fillings and coverings;
- metal, synthetic, industrial filters; and
- PVC coated materials.

Many end users buy from agents or distributors rather than directly from foreign producers. These agents had large debts in dollars and close to half of them are going bankrupt as a consequence of the devaluation of the peso. It is expected that the vacuum will be filled by either the stronger Mexican producers such as

*Celanese, Alfa, CYDSA-Bonlam and Hércules* or by foreign suppliers.

Most of the companies interviewed felt that any new Canadian initiative in the non-woven, engineered-textile sector would be ill-advised. The competition is strong, internationally backed, experienced, acquainted with the Mexican market, and firmly established.

### TRANSPORTATION TEXTILES

Procurements of products containing textiles by the multinational manufacturers are generally part of global sourcing strategies. Therefore, sales by independent Canadian companies directly to Mexico are not considered a good prospect. The average age of Mexican vehicles is much older than in Canada, and there is also a significant market for re-upholstering. However, buyers and distributors interviewed for this study reported that very little of this fabric is imported.

### UPHOLSTERY AND DRAPERY TEXTILES

Cotton-knit textiles are the most popular for domestic upholstery and drapery use. Roughly three-quarters of the products used are cotton or cotton blends. Popular blends include silk and polyester fibres. About 90 percent of imports are cotton-based. There are a number of opportunities for Canadian firms in this market. *Morel's* in particular, is interested in buying Canadian fabrics.

The prevailing opinion in the industry is that the upholstery and drapery textile market will shrink. One of the principal customers has been the construction industry. But although many buildings are being built, few are being sold, and the devaluation of the peso has only made this worse.

## THE REGULATORY ENVIRONMENT

### STANDARDS AND TESTING

Mexican official standards, known as *Normas Oficiales Mexicanas (NOMs)*, are imposed on a wide variety of

consumer products sold in Mexico, including textiles. All products for which *NOMs* have been issued must be tested in Mexico to obtain a certificate of compliance.

Technically, the burden of compliance with these standards falls on the importer, but in most cases Canadian exporters will have to provide the documentation. The certification number must be included on textile labels, along with the *NOM* logo. This is in addition to the general requirements for textile labelling.

Under the North American Free Trade Agreement (NAFTA), product testing can be done in all three countries, but Mexico has four years to comply and, until then, testing must be done in Mexico. Only three Mexican labs are open to any producer; the rest are captive operations of Mexican producers.

### DOCUMENTATION OF ORIGIN

All products imported into Mexico must be supported by documentation which identifies its origins. For shipments from Canada, the required documents are: a NAFTA certificate of origin, a NAFTA certificate of eligibility, or a declaration of origin from a non-NAFTA country which meets the requirements of the Mexican government. Otherwise, the goods may be subject to countervailing duties assessed against certain Asian countries.

### LABELLING

The Labelling Decree of March 7, 1994 sets out specific labelling requirements for textile products. As with other products, labels must be in Spanish, but for textile products, labels must be affixed to the product and not just to the packaging.

In late 1994, the Mexican government issued new draft labelling regulations for textile products. These amendments, expected to become effective in mid-1995, will add the requirement that the importer's Mexican taxation registration number appear on the label. In addition, instructions for product care will have to be more detailed.

## MARKET ENTRY STRATEGIES

Mexicans like to do business with people they know, and they value after-sales service. For this reason, a local presence in Mexico is a major competitive advantage. Canadian companies that have succeeded in Mexico have usually entered the market by establishing a relationship with an agent or distributor.

Some large clothing manufacturers and a few major retailers purchase textiles exclusively through New York buying agents, but few can handle the minimum quantities of direct imports. Therefore, agents and distributors play a large role in the import market. In many cases, the agent may be a Mexican textile manufacturer which adds imported products to round out its product lines.

Many Canadian companies have identified potential agents or distributors by attending trade shows either in Mexico or in the U.S. Advertisements in specialty trade publications are effective for many products. If the product involves a new technology or other innovation, technical seminars for Mexican manufacturers are yet another approach. There are three major annual trade shows: *Exintex*, in Puebla in November, *Expo Tela* in Mexico City in the spring and *Expo Textil* in Mexico City in September.

## KEY CONTACTS

### CANADA

#### *Canadian Government*

**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



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**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 108-A  
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 the Department of Industry (DI), 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.

**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.

**Market Intelligence Service** provides Canadian businesses 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 businesses 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; ident-

ification of foreign exporters to Canada; Canadian production; Canadian exports; and American imports. Two-thirds of the clientele for this service are small businesses. Call: (613) 954-4970.

**Department of Industry (DI)** was created with a broad mandate to improve the competitiveness of Canadian industry.

Textiles Apparel and Footwear Directorate  
Consumer Products Branch  
Department of Industry  
235 Queen Street  
Ottawa, ON K1A 0H5  
Tel.: (613) 954-2883  
Fax: (613) 954-3107

**Canadian International Development Agency (CIDA)** is an important possible source of financing for Canadian ventures in Mexico. A special fund is available through the 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 licensing arrangements. INC supports the development of linkages with the private sector in Mexico by 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 in Mexico.

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

**The Export Development Corporation (EDC)** is a unique financial institution that helps Canadian businesses to 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.

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**International Financing 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.

**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  
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Fax: (613) 235-9123

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### **Baker & McKenzie**

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### **Baker & McKenzie Barristers & Solicitors**

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### **Business and Professional Associations**

#### **Canadian Textiles Institute (CTI)**

66 Slater Street  
Suite 1720  
Ottawa, ON K1P 5H1  
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#### **Canadian Council for the Americas Executive Offices**

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Toronto, ON M5H 2L2  
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Fax: (416) 367-5460

#### **Canadian Exporters' Association**

99 Bank Street  
Suite 250  
Ottawa, ON K1P 6B9  
Tel.: (613) 238-8888  
Fax: (613) 563-9218

#### **Canadian Manufacturers' Association**

75 International Boulevard  
Fourth Floor  
Etobicoke, ON M9W 6L9  
Tel.: (416) 798-8000  
Fax: (416) 798-8050

### **The Canadian Chamber of Commerce**

55 Metcalfe Street  
Suite 1160  
Ottawa, ON K1P 6N4  
Tel.: (613) 238-4000  
Fax: (613) 238-7643

### **Forum for International Trade and Training Inc. (FITT Inc.)**

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Ottawa, ON K1P 6L1  
Tel.: (613) 230-3553  
Fax: (613) 230-6808

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### **Open Bidding Service**

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Ottawa, ON K1V 0W2  
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(613) 737-3374

### **Canadian Standards Association**

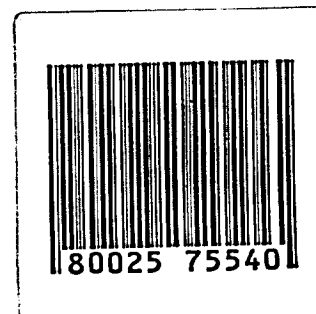
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Rexdale, ON M9W 1R3  
Tel.: (416) 747-4000  
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## KEY CONTACTS

### MEXICO

#### **Mexican Government**

**Secretariat of Commerce and  
Industrial Development**  
*Secretaría de Comercio y Fomento  
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**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

**National Institute for Statistics,  
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México  
Tel.: 918-6947  
Fax: 918-6945

**Secretariat of Agriculture and Water Resources**

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Insurgentes Sur No. 476, Piso 13  
Col. Roma Sur  
06760 México, D.F.  
México  
Tel.: 584-0786/0834  
Fax: 584-1887

**Central Bank of Mexico**

*Banco de México*  
Tacuba No. 4, Piso 1  
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México  
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**Mexican Development Bank**

*Nacional Financiera, S.A. (NAFIN)*  
Insurgentes Sur No. 1971, Torre 3,  
Piso 13  
Col. Guadalupe Inn  
01020 México, D.F.  
México  
Tel.: 325-6668/6669  
Fax: 325-6009

**National Oil Company**

*Petróleos Mexicanos (PEMEX)*  
Av. Marina Nacional No. 329  
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Associations**

**National Chamber of the Textile  
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**National Chamber of the Apparel  
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*Cámara Nacional de la Industria del  
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06040 México, D.F.  
México  
Tel.: 588-7822, 761-5446  
Fax: 578-6210

**Textile Chamber of Western Mexico**

*Cámara Textil de Occidente*  
Mexicaltzingo No. 2208  
Col. Moderna  
44150 Guadalajara, Jalisco  
México  
Tel.: 615-3633, 616-4483  
Fax: 616-0009

**National Chamber of the Apparel  
Industry of Puebla and Tlaxcala**

*Cámara Nacional de la Industria  
Textil de Puebla y Tlaxcala*  
11 Sur No. 2104, Piso 1  
Col. Centro  
72000 Puebla, Puebla  
México  
Tel.: 53-4200/4294/4295  
Fax: 37-3876

**Business Council of Puebla and  
Tlaxcala**

*Asociación de Empresarios de Puebla  
y Tlaxcala*  
11 Sur No. 2104, Piso 1  
Col. Centro  
72000 Puebla, Puebla  
México  
Tel.: 53-4200/4294/4295  
Fax: 37-3876

**National Association of Importers  
and Exporters of the Mexican  
Republic**

*Asociación Nacional de Importadores  
y Exportadores de la República  
Mexicana (ANIERM)*  
Monterrey No. 130  
Col. Roma  
06700 México, D.F.  
México  
Tel.: 564-8618  
Fax: 584-5317

**Mexican Confederation of National  
Chambers of Commerce**

*Confederación de Cámaras  
Nacionales de Comercio  
(CONCANACO)*  
Balderas No. 144, Piso 3  
Col. Centro  
06079 México, D.F.  
México  
Tel.: 709-1559  
Fax: 709-1152

**National Chamber of Commerce  
Cámara Nacional de Comercio  
(CANACO)**

Paseo de la Reforma No. 42  
Col. Centro  
06048 México, D.F.  
México  
Tel.: 592-2677/2665  
Fax: 592-3571

**Mexican Association of  
Manufacturers**

*Cámara Nacional de la Industria de  
Transformación (CANACINTRA)*  
Av. San Antonio No. 256  
Col. Nápoles  
03849 México, D.F.  
México  
Tel.: 563-3400  
Fax: 598-5888

**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: 525-043