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Market study on the Mexican market
for building products and material
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**MARKET STUDY ON THE MEXICAN MARKET FOR
BUILDING PRODUCTS AND MATERIALS**

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This market study has been prepared to assist Canadian firms interested in exporting to Mexico. While an effort has been made to examine the most important aspects of the sector, the study is not exhaustive. Companies will have to tailor their marketing approach according to their particular interests and circumstances.

Further assistance can be obtained by addressing requests directly to the Commercial Division of the Canadian Embassy in Mexico City located at Calle Schiller No. 529, Col. Polanco, 11580 Mexico, D.F., telephone (011-525) 254-3288, telex 177-1191 (DMCNME) and fax (011-525) 545-1769 (sending from Canada); or the Latin America and Caribbean Trade Division, External Affairs and International Trade Canada, 125 Sussex Drive, Ottawa, Ontario, K1A 0G2; phone (613) 996-8625; fax (613) 943-8806.

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MARKET STUDY ON THE MEXICAN MARKET
FOR BUILDING PRODUCTS AND MATERIALS

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1. BACKGROUND

Construction has been an important economic activity for many centuries, however the construction procedures used in Mexico have never been particularly innovative. The great pyramids of pre-Columbian times were basically built from large volumes of earth that was transported and pounded down, and then covered with a facing of stone and mortar to avoid its destruction by rain. The method used for the facing may have varied from culture to culture, but the basic principle remained always the same. The few roofed spaces were covered with very elementary wood beam structures and it was only in the Mayan area that a stone roofing method was developed, called "Mayan vault" or "false arch". As the second term suggests it, this procedure is not particularly efficient.

Pre-Columbian building procedures practically fell into oblivion, since they were not very useful for the type of construction needed by the Spaniards. The new buildings, such as palaces and churches, were built with European methods. Only a few prehispanic techniques were used during the sixteenth century, for masonry, waterproofing and mural painting, although very little of this field has yet been researched. In any case, the construction quality was never first class, for two reasons: in the first place, there was a scarcity of professional architects and of qualified labor; in second place, the authorities were never able to enforce compliance with existing ordinances. These conditions still persist to date.

Some procedures were typical to certain regions. In Mexico City, the Spaniards used to sink an infinite number of logs to increase ground-bearing capacity and to prevent the buildings from sinking into the muddy soil. Aztecs did the same, but there is no proof that the Spaniards learned this technique from them, since it is found throughout the world. On the other hand, no special method was developed to improve the resistance of buildings in the face of earthquakes. In areas such as Oaxaca and Chiapas, where earthquakes are more frequent and strong, the solution was simply to make thicker and lower structures. The dry climate and the abundance of good clay in the Guadalajara and Bajío regions, facilitated the building of so called "catalan vaulting", i.e. very flat vaults and domes made of brick and without centering. Other differences were mainly due to the use of regional materials in the decoration, e.g. reddish tezontle-stone facades in Mexico City, brightly colored tile and white stucco ornaments around Puebla and Tlaxcala, delicately carved limestone facades in Querétaro and San Luis Potosí and so forth.

These regional differences have gradually faded since the nineteenth century, as the principles of modern architecture spread about the country. At the same time, the new materials and procedures, such as iron, steel and concrete, are more and more commonly used and this has contributed to the disappearance of regional techniques. Political, social and material progress allowed for a significant improvement in building standards at the beginning of this century, but these advances were lost due

to the 1910 revolution. Since then, the demand for new buildings has usually exceeded both the material and human resources available and this has translated into lower architectural and construction quality. Even though construction techniques are much the same as those used in developed countries, economic policy over the last four decades has offered little incentive for manufacturers to broaden their lines of products. As a consequence, there is little variety in areas such as prefabricated housing, steel structures, flooring materials, lighting, bathroom and hardware fixtures, aluminium and wood doors and windows, all of which offer an interesting market to be tested by foreign firms.

2. ECONOMIC ENVIRONMENT

With the objective of reducing the inflation rate, the Mexican authorities implemented a stabilization program in 1988, called the Economic Solidarity Pact, which features traditional austerity measures, entailing tight fiscal and monetary policies and unorthodox measures, such as price, wage and exchange rate controls. This program has been the cornerstone of Mexico's economic policy over the past four years, and has recently been extended to January 1993. It has resulted in a drastic reduction of the inflation rate, from an annual rate of 159% in 1987 to 19.7% in 1989. Inflation rebounded to 29.9% in 1990 but was brought down to 18.5% in 1991 and is expected to be of 10% to 12% in 1992. At the same time, interest rates have fallen substantially to the present 17%, and the peso-dollar devaluation rate has been set at Mex\$0.2 pesos a day or 2.4% per annum.

Along with the objective of consolidating the progress made in price stabilization, Mexico's macroeconomic policy in 1992 aims to reaffirm gradual and sustained economic recuperation, basically by establishing the necessary conditions to encourage national and foreign investment and by stimulating local demand, and to strengthen the improvement in living standards of the poorest segment of society through the Solidaridad program.

Domestic economic activity recovered for the third consecutive year in 1989, after the 1986 recession, with a gross domestic product (GDP) growth rate of 3.1%. In 1990 it grew 3.9% and another 3.6% in 1991 to reach \$280.3 billion (1). With an 82.8 million population, per capita GDP was estimated at \$3,385 in 1991. Additionally, manufacturing output grew by 5.2% in 1990 and 3% in 1991 in real terms, private investment and consumption expanded 13.6% and 5.2% respectively and public investment was up 12.8%. During the 1992-1994 period, the GDP is expected to maintain an average annual growth rate of 4%-5%. Preliminary figures place GDP growth at 4% for 1992.

1. Note: All values in this report, unless otherwise stated (Mexican pesos, Mex\$, Canadian dollars, Cdn\$, etc) are quoted in United States dollar equivalents.

In an effort to revitalize and open the Mexican economy, the Mexican Government undertook a series of structural changes, including the accession to the General Agreement on Tariffs and Trade (GATT) on August 24, 1986 leading to an extensive trade liberalization process: import permits were eliminated on all but 325 of the total 11,950 tariff items based on the Harmonized System adopted in 1989. Official import prices are no longer applicable, nor the 5% export development tax, and import duties were lowered from a maximum of 100% in 1982 to 20% in January 1988. The weighted average tariff rate is now 10.4%. The automotive and computer industries have also been liberalized, through the elimination of prior import permits, to allow free entry of products in these industries. The approval of the North American Free Trade Agreement will further strengthen trade between Canada, the United States and Mexico.

According to official data from the Mexican Secretariat of Commerce and Industrial Development (SECOFI), Mexico's trade balance dropped once again in 1991 to a \$10.4 billion deficit from -\$3 billion in 1990. Exports increased by 2.6% in 1991, from \$26.8 billion to \$27.6 billion, while imports grew 22.2%, from \$29.8 billion to \$38 billion in 1991, having already increased 27.2% in 1990 from \$23.4 billion in 1989.

Total Mexican imports from Canada increased 24% in 1989, then decreased 1.5% in 1990 and again by 26% in 1991. Total Canadian exports to Mexico amounted to Cdn\$594 million in 1990 and Cdn\$440.8 million in 1991, while total Canadian imports from Mexico were valued at Cdn\$1,730 million in 1990 and Cdn\$2,574 million in 1991. According to Mexican figures, in 1990, 1.6% of Mexico's imports came from Canada, while 0.8% of its exports were to Canada. This makes Canada Mexico's sixth largest exporter and fifth largest importer.

3. MARKET ASSESSMENT

The Mexican market for construction and building products is a very significant market in terms of volume and value. In 1990, the last year for which there is available data, total apparent consumption in this market reached \$3.7 billion dollars, showing an increase of 18.2% over the \$3.2 billion reported in 1989, which themselves reflect a 6.9% growth rate over 1988 levels. During 1991, this market is estimated to have grown another 5% and the next three years are expected to show an average annual growth rate of 4%, placing total apparent consumption at \$4.4 billion in 1994.

TABLE 1
APPARENT CONSUMPTION OF BUILDING
PRODUCTS AND MATERIALS
(million U.S.\$)

| | 1988 | 1989 | 1990 | 1991e | 1994p |
|----------------|---------------|---------------|---------------|---------------|---------------|
| Production (1) | 3465.0 | 3717.9 | 3835.1 | 3988.5 | 4358.3 |
| + Imports (2) | 227.7 | 308.4 | 514.5 | 586.2 | 780.2 |
| - Exports (2) | 727.5 | 855.3 | 601.3 | 639.4 | 719.2 |
| TOTAL | 2965.2 | 3171.0 | 3748.3 | 3935.3 | 4419.3 |

Note: e = estimated p = projected

Source: (1) Based on data by the National Institute for Statistics, Geography and Computers (INEGI) compiled by the National Chamber for the Construction Industry (CNIC); (2) based on data published by the Secretariat for Commerce and Industrial Development (SECOFI)

The most important factor that has brought about this significant growth in the market for building products and materials has been the rapid growth in the construction sector as a whole, as described in section 4 of this report. Total construction GDP, which accounts for 5% of total GDP, grew 2.1% in 1989 and 7.7% in 1990, a record growth rate since 1980. Two related factors have accounted for this increase: the general growth in economic activity, which has generated an increased demand both by the private and the public sectors, Mexico's general deregulatory and privatization policies, and the increased availability of financing, together with the reduction in the cost of money, which have allowed for a reactivation in the construction of new housing. At the same time, several banks, in particular NAFINSA, the Government-owned industrial development bank, have made credits available to small and medium sized companies for the purchase of materials and supplies. These trends are expected to continue affecting this market, sustaining our estimate for a continued growth.

3.1 IMPORTS

Imports, which used to represent a very small portion of the Mexican market for building products and materials before 1987, have shown major increases in the past three years. In 1988, they amounted to \$227.7 million. They increased 35.4% in 1989 to \$308.4 million and another 66.8% in 1990 to reach \$514.5 million. While in 1988 they accounted for 7.7% of total apparent consumption, this share increased to 13.7% in 1990 and is expected to further grow to 17.7% by 1994, equivalent to \$780.2 million in terms of value. Several factors underlie this major change in the composition of the market. In the first place, Mexico's trade liberalization policies, together with the stability of the peso-dollar exchange rate have made the importation of products and materials easier and less costly.

Also, the domestic industry has been unable to face the rapidly growing demand for building products and materials as it emerges, and imports have had to complement the local production in satisfying market demand. Finally, domestic production tends to be limited to a relatively small number of items per category and both the quality and availability of products are often insufficient and variable. Imported products provide a much wider spectrum of alternatives and models, in particular in the case of decoration related items, with a more constant supply. It is expected that this trend will continue in the future, opening many opportunities to foreign exporters of building products and materials.

The following table lists Mexican imports in this market by category for 1988, 1989 and 1990, as well as the 1989-1990 percentage growth rate by item.

TABLE 2
TOTAL IMPORTS OF BUILDING PRODUCTS AND MATERIALS
(000 U.S.\$)

| | 1988 | 1989 | 1990 | %1 |
|---|-----------------|-----------------|-----------------|-----------|
| STONE & MINERAL BUILDING PRODUCTS | | | | |
| Slate | 54.3 | 49.6 | 102.7 | 107 |
| Marble | 495.1 | 726.3 | 961.0 | 32 |
| Granite | 55.2 | 169.1 | 267.6 | 58 |
| Gravel | 250.5 | 275.1 | 127.8 | -53 |
| Gypsum | 1,407.2 | 881.3 | 1,066.6 | 21 |
| Calk | 1,778.3 | 681.8 | 511.2 | -25 |
| Cement | 5,362.5 | 1,765.2 | 5,096.7 | 189 |
| Asbestos | 16,963.5 | 17,577.7 | 20,900.5 | 19 |
| Worked building stone | 2,209.8 | 3,837.6 | 5,286.2 | 38 |
| Slate | 16.7 | 18.0 | 31.1 | 73 |
| Gypsum products | 701.5 | 733.2 | 2,225.8 | 103 |
| Cement & stone products | 171.1 | 357.1 | 292.8 | -18 |
| Amianto-cement products | 303.2 | 536.7 | 599.5 | 12 |
| Ceramic products | 482.5 | 626.6 | 524.8 | -16 |
| Refracting ceramic products | 9,964.6 | 8,961.5 | 31,561.8 | 252 |
| Construction bricks | 73.0 | 54.1 | 42.9 | -21 |
| Ceramic tubes | 32.2 | 87.1 | 200.2 | 130 |
| TOTAL | 40,321.2 | 37,338.0 | 69,799.2 | 87 |
| WOOD, PLYWOOD AND CORK BUILDING PRODUCTS | | | | |
| Lumber | 26,763.1 | 29,619.7 | 44,328.9 | 50 |
| Veneer | 1,376.0 | 1,923.2 | 2,214.9 | 15 |
| Shaped wood f. constr. | 5,011.1 | 6,849.3 | 6,080.6 | -11 |
| Wood boards | 986.3 | 2,162.0 | 4,083.6 | 89 |
| Fibreboard | 782.2 | 1,432.6 | 2,869.9 | 100 |
| Plywood panels | 13,707.5 | 15,893.5 | 30,165.3 | 90 |
| Densified wood | 429.5 | 171.7 | 285.6 | 66 |
| Cork products | 624.4 | 1,095.6 | 833.8 | -24 |
| TOTAL | 49,680.1 | 59,147.6 | 90,862.6 | 54 |

| | 1988 | 1989 | 1990 | %1 |
|--------------------------------|----------------|----------------|----------------|-----------|
| GLASS BUILDING PRODUCTS | | | | |
| Glass in sheets | 181.8 | 477.7 | 151.5 | -68 |
| Blown glass | 51.0 | 152.3 | 325.6 | 114 |
| Mirrors | 1,732.6 | 2,040.1 | 1,116.4 | -45 |
| Ornamental glass | 231.0 | 227.5 | 298.2 | 31 |
| Security glass | 248.4 | 830.6 | 1,204.6 | 45 |
| Insulating glass | 24.8 | 13.8 | 53.5 | 288 |
| Construction articles | 542.3 | 1,034.3 | 1,528.9 | 48 |
| Fibre glass | | 1,149.2 | 1,234.7 | 7 |
| TOTAL | 3,011.9 | 5,925.5 | 5,913.4 | -1 |

| | | | | |
|---|-----------------|-----------------|-----------------|-----------|
| CHEMICAL & PETROCHEMICAL BUILDING PRODUCTS | | | | |
| Paints & varnishes | 6,075.1 | 7,478.1 | 17,865.2 | 139 |
| Mastic | 770.4 | 683.6 | 868.5 | 27 |
| Glues & adhesives | 2,630.7 | 6,886.4 | 9,541.5 | 39 |
| Solvents | 925.3 | 1,384.3 | 1,504.3 | 9 |
| Insulating materials | 380.4 | 904.5 | 856.7 | -5 |
| Asphalt | 133.2 | 329.6 | 562.3 | 71 |
| Panels | 479.8 | 364.1 | 911.8 | 150 |
| TOTAL | 11,394.9 | 18,030.6 | 32,110.3 | 78 |

| | | | | |
|--|----------------|----------------|-----------------|------------|
| FABRICATED STRUCTURAL METAL AND METAL BUILDING PRODUCTS | | | | |
| Iron/steel bars & rods in coils | 994.5 | 2,339.7 | 12,827.1 | 448 |
| Concrete reinforcing bars | 3,486.8 | 1,120.7 | 16,517.5 | 1374 |
| Ir/st angles/shapes/sections | 867.4 | 891.9 | 1,386.9 | 56 |
| Netting & fencing | 1,267.9 | 1,566.0 | 2,395.3 | 53 |
| Steel cable | 1,905.0 | 1,013.3 | 832.3 | -18 |
| Bars & shapes aluminium | 1,047.1 | 1,129.3 | 1,761.9 | 56 |
| TOTAL | 9,568.7 | 8,060.9 | 35,721.0 | 343 |

| | | | | |
|---|-----------------|-----------------|-----------------|-----------|
| WALL, FLOOR & ROOF COVERINGS | | | | |
| Plastic floor covering | 1,113.7 | 1,712.1 | 3,790.5 | 121 |
| Wall paper | 679.8 | 2,347.4 | 3,572.9 | 52 |
| Paper & linoleum floor cov. | 1,186.1 | 1,313.4 | 816.5 | -38 |
| Carpeting | 3,743.9 | 11,966.2 | 24,862.3 | 108 |
| Stone floor coverings | 23.1 | 24.3 | 166.0 | 543 |
| Roofing tiles | 29.9 | 67.6 | 146.8 | 117 |
| Flags/paving/tiles unglazed | 123.5 | 134.5 | 396.7 | 195 |
| Flags/paving tiles glazed | 8,646.1 | 23,267.1 | 25,616.6 | 10 |
| TOTAL | 15,546.1 | 40,832.6 | 59,368.3 | 45 |

| | | | | |
|----------------------------------|-----------------|-----------------|-----------------|------------|
| CONSTRUCTION ARTICLES (2) | | | | |
| Blinds - plastic | 247.8 | 1,074.6 | 1,897.6 | 77 |
| Plastic articles | 178.2 | 908.6 | 1,304.1 | 44 |
| Wood articles | 759.6 | 2,037.6 | 3,225.1 | 58 |
| Steel articles | 12,143.5 | 6,285.2 | 16,983.8 | 170 |
| Aluminum articles | 852.2 | 1,602.5 | 2,902.7 | 81 |
| Zinc articles | 151.2 | 500.1 | 1,836.3 | 267 |
| TOTAL | 14,332.5 | 12,408.6 | 28,149.6 | 127 |

| | | | | |
|--------------------------------|---------|---------|---------|---|
| PREFABRICATED BUILDINGS | | | | |
| Prefabricated buildings | 2,796.9 | 4,597.9 | 4,925.6 | 7 |

| | 1988 | 1989 | 1990 | %1 |
|--|------------------|------------------|------------------|------------|
| BUILDERS HARDWARE | | | | |
| Locks & padlocks | 4,514.0 | 8,396.9 | 12,289.8 | 46 |
| Hardware | 8,125.1 | 12,872.6 | 37,542.5 | 192 |
| TOTAL | 12,639.1 | 21,269.5 | 49,832.3 | 134 |
| PLUMBING & PIPE PRODUCTS | | | | |
| Ethylene tubing | 869.7 | 1,017.6 | 1,793.8 | 76 |
| Polypropylene tubing | 62.4 | 163.3 | 200.1 | 22 |
| PVC tubing | 6,061.6 | 10,906.0 | 11,755.3 | 8 |
| Other plastic tubing | 2,542.5 | 3,157.9 | 2,829.6 | -10 |
| Copper tubing | 3,767.3 | 4,590.3 | 4,611.1 | 1 |
| Copper tubing accessories | 174.3 | 212.5 | 160.0 | -25 |
| Plastic sanitary ware | 695.0 | 1,224.8 | 1,721.4 | 41 |
| Ceramic sanitary articles | 377.8 | 835.6 | 3,703.3 | 343 |
| Steel sanitary articles | 1,477.4 | 1,748.2 | 2,604.9 | 49 |
| Copper sanitary ware | 138.9 | 284.7 | 293.6 | 3 |
| Aluminum sanitary ware | 252.7 | 221.0 | 130.0 | -41 |
| Steam boilers | 1,765.8 | 1,475.9 | 1,971.6 | 34 |
| Central heating boilers | 145.8 | 123.8 | 155.5 | 26 |
| Auxiliary eq. for boilers | 1,120.2 | 1,066.7 | 6,555.3 | |
| Water heaters | 1,101.7 | 1,980.3 | 1,673.5 | -15 |
| Water heaters - electric | 731.0 | 692.4 | 720.4 | 4 |
| Fittings & brass goods | 3,048.0 | 6,129.3 | 9,364.2 | 53 |
| TOTAL | 24,332.1 | 35,830.3 | 50,243.6 | 40 |
| ELECTRIC LIGHTING FIXTURES & SUPPLIES | | | | |
| Copper cable insulated | 1,004.5 | 380.5 | 2,537.5 | 567 |
| Switches & wiring devices | 31,580.0 | 42,909.6 | 57,554.8 | 34 |
| Control & distribution panels | 725.1 | 2,114.8 | 3,611.3 | 71 |
| Electric cable | 3,131.0 | 6,167.6 | 7,488.3 | 21 |
| Lamps & lighting fixtures | 7,587.9 | 13,402.5 | 16,340.4 | 22 |
| TOTAL | 44,028.5 | 64,975.0 | 87,532.3 | 35 |
| GRAND TOTAL | 227,652.0 | 308,416.5 | 514,458.2 | 67 |

Notes: (1) 1989-1990 percentage growth rate
(2) including doors, windows, cisternas, depositos, persianas

Source: Data published by SECOFI

As can be seen in the above table, in terms of value, the largest category of imports of building products and materials corresponds to wood and cork products (17.7%), followed by electric lighting fixtures and supplies (17.0%), stone and mineral products (13.6%), floor, wall and roof coverings (11.5%), plumbing and pipe products (9.8%), builders hardware (9.7%), metal products (6.9%), chemical and petrochemical products (6.2%), construction articles (5.5%), glass products (1.1%) and prefabricated buildings (1%).

In terms of growth patterns, the product categories exhibiting the fastest growth rates are iron and steel products (343%), builders hardware (134%), construction articles (127%), stone and mineral products (87%), chemical and petrochemical products

(78%), wood and cork products (54%), floor, wall and roof coverings (45%), plumbing and pipe products (40%), electric lighting fixtures and supplies (35%), prefabricated buildings (7%) and glass products (-1%), the only category that exhibited a negative growth rate in 1990.

In terms of individual product categories, the ones with the largest import volumes in 1990 were: Switches & wiring devices, wood aserrada & desbastada, hardware, refracting ceramic products, madera c. chapa, baldosas esmaltadas, carpeting, asbestos, paints & varnishes, steel construction articles, varilla, lamps & lighting fixtures, alambrón, locks & padlocks, PVC tubing, glues & adhesives, fittings & brass goods, electric cable, wood perfilada, auxiliary eq. for boilers, piedra de talla (incl. marble), cement, prefabricated buildings, copper tubing, tableros, plastic floor covering, ceramic sanitary articles, control & distribution panels, wall paper, wood construction articles.

The areas that are perceived as having the best sales opportunities for foreign suppliers are, first of all, those related to decoration and finishings, such as hardware, locks and padlocks, wall, roof and floor coverings, construction articles, sanitary articles and lighting fixtures. The second potentially good area is where domestic production tends to be insufficient, with products such as structural iron and steel products, bricks, asbestos, wood and wood products, electric fixtures and pipes. Areas perceived to have little potential are glass, cement, most petrochemical products, basic steel articles and stone products.

The vast majority of construction materials and products are presently imported from the United States, which enjoys an import market share fluctuating between 65% and 75%. This predominance is mostly due to the geographical proximity of both countries, which allows for faster and cheaper delivery, and to the familiarity of Mexican users, many of which have made graduate studies in the United States, with U.S.-made products. However, countries such as Germany, Italy, France and Japan successfully compete with American products in certain areas. Canada, however, only has a small participation in the Mexican market, with total exports to Mexico of Cdn \$21.6 million in 1991, reflecting a continuous increase in the past three years. These exports are however highly concentrated in one product -asbestos-, which accounts for 74% of total exports.

Canadian imports from Mexico, on the other hand, amounted to Cdn\$50.3 million in 1991, with large exports of gypsum, carpets of man-made materials, worked monumental building stone (incl. marble, travertine and alabaster), glazed ceramic tiles and sanitary articles, electrical relays, switches and protective appliances.

The following table shows Canadian exports of construction and building products to Mexico between 1988 and 1991.

TABLE 3
CANADIAN EXPORTS OF BUILDING PRODUCTS
AND MATERIALS TO MEXICO
(000 Cdn\$)

| | 1988 | 1989 | 1990 | 1991 |
|--------------------------------------|------|-------|-------|-------|
| Granite | | | | 15 |
| Portland cement white | | 224 | | |
| Plasters | | | 25 | |
| Asbestos | 8209 | 10525 | 13448 | 15989 |
| Paints & varnishes | | 335 | 245 | 19 |
| Mastics | | 35 | 13 | |
| Glues & adhesives | 47 | | | |
| Solvents & thinners | | | | 15 |
| Plastic tube & pipe | 17 | 98 | 3751 | |
| Plastic floor/roof/ wall covering | 2 | 5 | | |
| Plastic doors & windows | 15 | | | 90 |
| Plastic shutters & blinds | 13 | | | |
| Plastic builders ware | | 9 | 4 | |
| Lumber | 145 | 54 | 117 | |
| Veneer | | 61 | | 8 |
| Continuously shaped wood | 3 | 3 | | |
| Fibreboard | | 34 | 14 | |
| Plywood | 5 | 5 | | |
| Wood doors & windows | 32 | 6 | | |
| Wood shuttering | | 157 | 33 | 3927 |
| Wood shingles | 6 | 18 | | |
| Wood builders ware | 60 | 4 | 15 | 47 |
| Wall paper | | | 27 | 2 |
| Carpets | 115 | 217 | 173 | |
| Insulating mineral material | | | 3 | |
| Refractory bricks | | | 26 | |
| Asphalt | 26 | 2 | | |
| Plaster boards | 1 | | | |
| Tiles | 78 | | | 35 |
| Float glass in sheets | | | 8 | |
| Ceramic sanitary arts. | 24 | | | |
| Glass fibres | 3 | | 10 | |
| Iron & steel bars & rods | | 185 | | 53 |
| Iron angles & shapes | 1311 | 24 | 185 | 201 |
| Iron & steel doors/wind. | 44 | 24 | | |
| Iron & steel structures | 105 | 32 | 56 | 36 |
| Iron & steel wire & cable | 291 | 132 | 3 | 9 |
| Iron & steel fencing | 2 | 8 | 32 | 2 |
| Iron & steel sanitary art. | 25 | | 1 | |
| Copper pipes | 13 | | 124 | |
| Copper sanitary ware | | 2 | 3 | |
| Aluminium bars & profiles | | 8 | | |
| Aluminium doors & wind. | 3 | | | |
| Aluminium structures | 14 | 34 | | 11 |
| Zinc articles | 20 | | | |
| Locks & keys | 9 | 58 | 60 | 49 |
| Hinges | 302 | 140 | 175 | |

| | 1988 | 1989 | 1990 | 1991 |
|----------------------------|--------------|--------------|--------------|--------------|
| Castors | 10 | | 1 | |
| Mountings & fittings | 7 | 73 | | |
| Central heating boilers | 117 | | | |
| Electrical fuses | | 28 | | 6 |
| Automatic circuit breakers | 528 | 944 | 689 | 517 |
| Protective electric appl. | 63 | 1 | 12 | |
| Electrical relays | 27 | 1 | 57 | 6 |
| Electric switches | 43 | 114 | 209 | 121 |
| Plugs & sockets | | 135 | 5 | 5 |
| Other electric appl. | 19 | 739 | 211 | 66 |
| Electric boards & panels | 3 | 24 | 342 | 78 |
| Insulated wire | 158 | 28 | | 59 |
| Electric conductors | 137 | 12 | | 51 |
| Wall & roof lighting fixt. | 10 | | 5 | 8 |
| Prefabricated buildings | | 18 | 63 | 144 |
| TOTAL | 12062 | 14556 | 20145 | 21569 |

Source: Statistics Canada - International Trade Division

3.2 DOMESTIC PRODUCTION

Mexico was, for many years, self sufficient in the production of building products and materials, with marginal imports to complement production when it was temporarily insufficient to cover demand. During the 1982-1983 and 1985-1986 economic crisis, construction fell significantly, thereby reducing the demand for building materials, but, as the economy recovered, construction grew again and is slowly putting pressure on the domestic industry for construction inputs. This trend coupled with Mexico's trade liberalization policies has brought about an increase in imports as described in the two sections above.

The domestic industry has continued to grow, albeit at a slower pace than imports, thereby reducing its participation in total apparent consumption (see Table 1). In 1988 it amounted to \$3.5 billion. It grew 7.3% in 1989, and another 4% in 1990. It is expected to have increased again in 1991, by 6.8% and to continue growing at a 4% rate through 1994, to reach \$4.36 billion by then.

The following table shows domestic production of selected building products and materials between 1988 and 1990 in terms of volume.

TABLE 4
DOMESTIC PRODUCTION OF SELECTED
BUILDING PRODUCTS AND MATERIALS
 (volume)

| | unit | 1988 | 1989 | jan-sep 1990 |
|--------------------|----------|---------|---------|-----------------|
| Plywood | 000 m2 | 13,738 | 14,468 | 11,564 |
| Paints | 000 lts | 47,742 | 49,078 | 41,515 |
| Impermeabilizators | 000 kgs | 39,785 | 33,490 | 21,187 |
| Water tanks for WC | pieces | 761,794 | 744,668 | 571,515 |
| WC's | sets | 1,266 | 1,269 | 1,032 |
| Sinks | pieces | 492,001 | 595,041 | 479,575 |
| Water containers | tons | 21,822 | 25,916 | 25,538 |
| Water heaters | pieces | 359,759 | 417,308 | 420,587 |
| PVC pipe & acc. | tons | 14,660 | 16,924 | 17,082 |
| Copper pipes | tons | 30,896 | 33,697 | 20,362 |
| Piping | tons | 51,282 | 48,487 | 47,242 |
| Grey Portl. cement | 000 tons | 22,922 | 23,567 | 18,140 |
| White cement | tons | 383,713 | 437,915 | 343,201 |
| Asbestos sheets | tons | 106,672 | 139,781 | 121,778 |
| Concrete | 000 m3 | 2,240 | 2,072 | 1,879 |
| Concrete plates | m2 | 229,449 | 166,860 | 199,059 |
| Sleepers | 000 | 829,033 | 437,262 | 415,027 |
| Steel bars | tons | 685,388 | 663,354 | 531,133 |
| Steel profiles | tons | 536,691 | 577,417 | 448,915 |
| Steel fences & net | tons | 56,568 | 66,944 | 60,657 |
| Aluminium profiles | tons | 22,133 | 23,732 | 19,037 |
| Metal beams | tons | 9,879 | 7,289 | 4,810 |
| Bricks | 000 | 44,114 | 105,711 | 88,541 |
| Glass | tons | 281,472 | 320,594 | 89,773 |
| Floor tiles | 000 m2 | 15,829 | 16,271 | 12,989 |
| Outdoor tiles | 000 | 39,820 | 38,498 | 32,172 |
| Roof tiles | 000 | 14,390 | 19,366 | 12,514 |
| Wire & cable | tons | 36,978 | 46,735 | 38,045 |

Source: INEGI

Mexico is also a major exporter of building products and materials, as evidenced by its \$601.3 million exports of 1990, although Mexico's exports have shown a decreasing tendency as a result of the recovery of the construction industry and the increased internal demand for these products. Mexico's most important exports during 1990, in million dollars, include:

| | |
|---|---------|
| Iron & steel products | \$116.9 |
| Cement | \$ 69.6 |
| Floor & roof coverings (part. tiles) | \$ 58.1 |
| Electrical material | \$ 48.9 |
| Wood & wood products | \$ 48.6 |
| Copper products | \$ 39.9 |
| Carpets | \$ 24.9 |
| Gypsum | \$ 12.2 |

| | |
|--------------------|---------|
| Water heaters | \$ 12.1 |
| Builders hardware | \$ 9.3 |
| Glass products | \$ 5.8 |
| Aluminium products | \$ 4.5 |

4. END USERS

The Mexican construction industry represents a very important economic activity, as measured by a 5% participation in the country's total GDP. Additionally, it is one of the most important employment generating activities, since it accounts for 10% of total employment. In the area of construction, there are close to one million workers registered with the National Institute for Social Security (IMSS), which by law covers all workers in private companies. The construction industry has a multiplier effect over 34 of the total 72 sectors of the economy, from which, as a whole, it purchases 7.6% of production, while it contributes with 20.4% of purchases to industrial sectors.

The growth of the construction sector is procyclical, since it tends to grow with the economy as a whole but at more pronounced rates. This sector decreased by 10.3% in 1986, at the time of the economic crisis, then recovered by 2.8% in 1987, remained the same in 1988 and grew by 2.1% in 1989. In 1990, it grew at increasingly high rates to reach a global growth of 7.7%, placing itself as the most dynamic sector of the economy during that year. This growth was basically the response to a 9% increase in public investment and 5.4% in private investment.

According to the Secretariat for Programming and Budgeting (SPP), as cited in the 1991 CIHAC construction catalog, in 1990, total gross formation of fixed capital amounted to approximately \$34 billion. The construction industry accounted for 56% of this total (or \$19 billion) and can itself be divided as follows: 50% in residential buildings, 24% in non residential construction, and 26% in self-construction. Additionally, total fixed capital formation by the construction industry can be divided into private construction (60%), of which close to 80% corresponds to residential construction, and public construction (37%).

4.1 PUBLIC SECTOR

Public construction, which amounts to approximately \$7 billion, can itself be divided as follows:

| | | |
|-------------------------|--|-------|
| 34%: buildings | | |
| (incl. office buildings | | 11.6% |
| industrial & commercial | | |
| buildings | | 8.7% |
| hospitals | | 6.9% |
| schools | | 5.0% |
| housing | | 2.0%) |

| | | |
|------|--|-------|
| 24%: | petroleum and petrochemicals | |
| | (incl. well drilling | 15.3% |
| | refineries & petro-chemical plants | 5.1% |
| | pipe systems | 1.9% |
| | storage & distribution | 1.1%) |
| 16%: | transportation | |
| | (incl. roads | 9.0% |
| | urban street systems | 3.4% |
| | railroads | 2.9% |
| | marine works | 0.7% |
| | subway | 0.4%) |
| 14%: | electricity and communications | |
| | (incl. thermoelectrical plants | 4.8% |
| | telephone & telegraph distribution & | 3.5% |
| | transmission lines | 1.8% |
| | electrical substations | 1.7% |
| | hydroelectrical plants | 0.1%) |
| 8%: | water, irrigation and sanitary instalation | |
| | (incl. drinking water systems | 3.5% |
| | urban sewage | 2.5% |
| | irrigation | 1.7% |
| | dams | 0.4%) |
| 3% : | other construction | |
| | (incl. mining | 0.1% |
| | other | 3.3%) |

The overall trend in public investment has been positive during the past few years, increasing from \$3 billion in 1986, to the \$4.4 billion reached in 1990. The 1991 budget called for a major increase in public investment in the area of social development, which includes education (with a 25% growth), health (10%), drinking water and urban development (54%) and the new Solidarity program (40%), which corresponds to a joint effort to be made by the Government, which provides material support to a particular area and project, and the beneficiaries of that project, which provide the necessary labor.

4.2 PRIVATE SECTOR

According to the above mentioned source, private investment in construction has increased from \$11.9 billion in 1988 to \$15.4 in 1990 and another 8.5% in 1991, to \$16.7 million. This figure can further be divided as follows during 1990 and 1991:

TABLE 5
PRIVATE INVESTMENT IN CONSTRUCTION
(volume & US\$ million)

| | 1990 units | 1991 units | 1990 value | 1991 value |
|--|---------------|---------------|---------------|---------------|
| A. RESIDENTIAL BUILDINGS | | | | |
| TOTAL | | | 8,819.6 | 10,740.0 |
| One family housing | 77,100 | 82,500 | 5,355.9 | 6,333.3 |
| luxury | 2,100 | 2,500 | | |
| middle | 27,000 | 29,000 | | |
| social | 48,000 | 82,500 | | |
| Multiple family housing | 67,775 | 75,400 | 2,150.8 | 2,620.0 |
| luxury | 1,575 | 1,600 | | |
| middle | 13,200 | 13,800 | | |
| social | 53,000 | 60,000 | | |
| Selfconstruction | 330,000 | 360,000 | 1,312.9 | 1,786.7 |
| suburban | 180,000 | 200,000 | | |
| rural | 150,000 | 160,000 | | |
| B. REMODELING & MAINTENANCE OF RESIDENTIAL CONSTRUCTION | | | | |
| TOTAL | 585,000 | 601,000 | 812.2 | 985.3 |
| luxury | 15,000 | 16,000 | | |
| middle | 110,000 | 115,000 | | |
| social | 460,000 | 470,000 | | |
| C. INDUSTRIAL BUILDINGS | | | | |
| Large firms | 47 | 68 | 659.1 | 1,234.7 |
| new plants | 15 | 24 | | |
| expansion | 32 | 44 | | |
| Medium-sized firms | 932 | 592 | 552.9 | 682.3 |
| new plants | 60 | 72 | | |
| expansions | 60 | 85 | | |
| industrial shifts | 210 | 215 | | |
| storage | 196 | 200 | | |
| silos | 406 | 20 | | |
| D. COMMERCIAL BUILDINGS | | | | |
| TOTAL | 550 | 110 | 1,236.8 | 1,122.7 |
| luxury offices | 28 | 30 | | |
| middle offices | 70 | 60 | | |
| malls | 11 | 20 | | |
| supermarkets | 21 | | | |
| stores | 420 | | | |

| | 1990 units | 1991 units | 1990 value | 1991 value |
|--|---------------|---------------|-----------------|-----------------|
| E. INSTITUTIONAL BUILDINGS FOR SOCIAL GATHERING | | | | |
| TOTAL | 202 | 194 | 204.0 | 242.8 |
| sport clubs | 14 | 20 | | |
| schools | 140 | 130 | | |
| universities | 6 | 4 | | |
| movies & theatres | 14 | 10 | | |
| churches | 28 | 30 | | |
| F. HOSPITAL BUILDINGS | | | | |
| TOTAL | 36 | 45 | 52.5 | 60.3 |
| medium sized hospitals | 11 | 13 | | |
| clinics | 25 | 32 | | |
| G. HOTEL BUILDINGS | | | | |
| TOTAL | 74 | 58 | 1,162.8 | 1,666.3 |
| luxury | 21 | 15 | | |
| middle | 28 | 17 | | |
| motels | 25 | 26 | | |
| GRAND TOTAL | | | 13,499.9 | 16,734.4 |

Source: Catálogo CIHAC de la Construcción 1991

As can be seen in the above table, by far the most significant category within private construction is residential construction, which represents 64% of total value in 1991. It is important to note, that close to half of that amount corresponds to middle class residences, in particular private homes, followed by social interest rate housing (as described below), and self construction, although the latter is very difficult to estimate. The second largest category corresponds to industrial construction, followed closely by hotels, and then commercial construction. The other categories represent a relatively small part of the market. In the area of hotel and tourism related construction, the government managed FONATUR, or National Fund for Tourism, plays an important role in the development of new areas and infrastructure, as well as in the financing of hotel construction, as evidenced by credits in the amount of \$63 million, which generated total investments in hotel construction of \$155 million in 1990.

4.3 HOUSING

Several agencies have contributed to the construction and sale of housing: the local banks have instituted the National Housing Program, there are several compulsive savings funds including INFONAVIT and FOVISSSTE, Federal Government and public agency programs. Credit funds for construction by local banks have

increased significantly in the past two years: while in 1988, a total amount of \$649 million were outstanding to the construction sector, by 1990, this amount had increased to \$3,228 million, reflecting a 198.8% real increase. Of these funds, 98% correspond to the private banking system

Total construction of housing is estimated at approximately 675,000 units in 1991, with an estimated annual increase of 3.8% per annum. Of this total, CIHAC considers 381,200 acceptable constructions, while the rest is considered deficient, in particular due to the use of improper materials. Of total acceptable housing, 53% is social interest housing, or subsidized housing built by the formal sector, including mostly public sector institutions. The remaining 47% is built by the informal sector and corresponds mostly to middle class housing and economic housing without financing.

Investments in the construction of popular housing by the public sector increased by 18.5% in 1990, after showing two consecutive years of negative rates of 11%. Investments in this area increased from \$2.9 billion in 1989 to \$3.2 billion in 1990. The following table shows the number of homes financed by different government agencies between 1988 and 1990, and the 1991 construction program by agency, both in terms of units built and programmed investment value:

TABLE 6
FINANCING FOR HOUSING BY AGENCY
(units / US\$billion)

| | 1988 | 1989 | 1990 | 1991p | 1991 \$b11 |
|----------------------|----------------|----------------|----------------|----------------|---------------|
| INFONAVIT | 57,504 | 71,925 | 81,000 | 67,000 | 1.20 |
| FOVISSSTE | 14,923 | 19,848 | 14,124 | 25,639 | 0.29 |
| FOVI-BANKS | 104,903 | 53,004 | 95,000 | 134,134 | 2.01 |
| FONHAPO | 61,004 | 42,834 | 61,745 | 60,130 | 0.12 |
| PEMEX | 3,147 | 531 | 5,286 | 5,300 | 0.15 |
| CFE | 1,584 | 1,912 | 1,073 | 1,683 | 0.02 |
| FOVIMI-ISSFAM | 1,179 | 451 | 1,853 | 3,731 | 0.09 |
| FIVIDESU | 3,199 | 38,623 | 29,333 | 4,070 | 0.04 |
| State agencies | | | | 55,000 | 0.07 |
| Other agencies | 4,959 | 41,549 | 40,000 | 1,190 | 0.01 |
| Reconstruction prog. | 10,271 | 3,081 | 0 | 536 | 0.02 |
| TOTAL | 262,673 | 273,758 | 329,414 | 358,413 | 4.02 |

Source: Catálogo CIHAC de la Construcción 1991

INFONAVIT: Institute of the National Fund for Worker's Housing

FOVISSSTE: Fund for the Housing of Public Workers

FOVI: Banking Operation and Discount Fund to Housing

FONHAPO: National Fund for Popular Housing

PEMEX: Mexican Petroleum

CFE: Federal Electricity Commission

FOVIMI-ISSFAM: Army and Navy Housing Funds

According to data from the 1980 census, the materials most commonly used in the construction of the 12 million private homes then visited were as follows:

| | | |
|------------|--------------------------|-----|
| On floors: | Cement or concrete | 46% |
| | Earth | 26% |
| | Mosaic & other coverings | 26% |
| | Non specified floors | 2% |
| On roofs: | Concrete or bricks | 44% |
| | Metal or asbestos sheets | 17% |
| | Tiles | 13% |
| | Cardboard | 12% |
| | Palm or wood | 10% |
| | Other | 4% |
| On walls: | Bricks & block | 57% |
| | Adobe | 21% |
| | Wood | 9% |
| | Mud | 4% |
| | Palm or bamboo | 3% |
| | Cardboard | 2% |
| | Metal or asbestos sheets | 1% |
| | Other | 3% |

Between 1987 and 2000, it is estimated that over eight million new homes will have to be built, or approximately 636,000 per year. Of these, 68% correspond to low income family housing, 17% to low middle income class housing, 7% to high middle class income housing and 2% to high income housing.

4.4 FORMAL SECTOR

The formal sector corresponds to construction by the 18,000 companies registered with the National Chamber for the Construction Industry (Cámara Nacional de la Industria de la Construcción - CNIC) in 1991. While production by these companies fell by 51.3% in real terms in 1988, it has grown by 54.5% in 1989, 38.5% in 1990, and 29.2% during 1991. Production by this sector is estimated to grow another 8.5% in 1992, to reach a total of \$10 billion. Of the total number of firms registered with CNIC, 90.9% are small firms and contribute with 39.7% of production, 7% are medium sized firms and produce 15%, 1.3% are large firms and produce 16.7%, and 0.8% are very large firms and produce 28.6%. Formal sector firms employ some 85,000 office employees and 350,000 blue collar workers, of which only 16% are permanent workers and the remainder are eventual ones, due to the cyclical nature of this industry. These firms are mostly located in the states of Mexico City (21%), Nuevo León (10%), Jalisco (8%) and Veracruz (7%).

One area has been the principal motor of this growth: infrastructure development, basically in the construction of

highways, which has recently been concessioned to private companies, as well as their management, bringing about major investments in this area. In the area of real estate development, the most active sector has been that of tourism and commercial development and construction.

The public sector has traditionally played a very important role in generating demand for the formal Mexican construction industry. Until 1987, public agencies, including federal, state and municipal governments and decentralized agencies, accounted for as much as 80% of the total construction business of formal sector companies in Mexico. Over the present administration, which has stressed privatization policies, this participation has fallen to 65% in 1991 and is expected to drop to 61% in 1992.

Total public sector construction can further be divided as follows:

- 56.3%: Parastate and decentralized agencies, headed by PEMEX, the government owned petroleum and petrochemical company, the various housing programs, such as INFONAVIT and FOVISSSTE, the Federal Electricity Commission, and other agencies, such as CAPFCE, the school building program, TELMEX, the national telephone company, Fertimex, the fertilizer producing company, the social security system (IMSS and ISSSTE) among the most important;
- 24.9%: the Federal Government, including mostly Secretariats and the Mexico City government;
- 18.8%: Municipal and state governments

The production by the formal construction sector can be divided as follows in 1990:

| | |
|-----------------------------|-------|
| Non residential buildings | 22.0% |
| Housing | 19.1% |
| Ground transportation lines | 13.2% |
| Industrial construction | 9.7% |
| Urban development | 9.5% |
| Instalations | 8.2% |
| Hydraulic works | 8.1% |
| Professional services | 4.4% |
| Marine & fluvial | 2.5% |
| Other | 3.3% |

The areas which have undergone the most significant increases have been residential and non residential housing in response to increased credit lines in these areas, and heavy construction headed by road construction with the privatization of this segment.

5. MARKET ACCESS

Sales in Mexico are usually made through local agents and distributors, normally operating on a commission basis, or through the Mexican affiliates of foreign companies. Decisions should be taken on whether to use an agent, joint venturing or

licensing with a Mexican company. Mexico's market is highly competitive and companies which maintain an active presence in the market and establish a good track record by virtue of product performance, competitive price and service will do well.

High value sales, most common in this market segment, usually are made through letters of credit. Small value sales are either made cash or with a 50% advance payment when the order is placed and 50% on delivery. It is important to find out the sales and financing practices of individual entities, in particular in the case of government agencies, since some of them are known to delay payment to suppliers for over 90 days.

Formerly, in order to bid on tenders and sell to a government agency or decentralized company, foreign manufacturers required having a local resident agent and to have the foreign supplier registered and accepted by the Secretariat of Planning and Budgeting (Secretaría de Programación y Presupuesto - SPP). As of July 1991, the above requirement for prior registration with SPP has been eliminated.

The new procedures now in force require the foreign supplier to have a local agent or representative and it has to be registered through his local representative as an accepted supplier with each government ministry and/or decentralized agency according to the international tender requirements under review.

As a result of Mexico's accession to GATT, the Mexican government has gradually opened the economy to international markets. Tariffs have been lowered from a maximum 100% in 1983, to 20% since December, 1988. The official price system has been totally eliminated and import permits are required on only 198 of the total 11,812 items in the Mexican Harmonized Tariff System.

The import climate for construction and building products has improved significantly as a result of this commercial liberalization. Maximum duty rates have been reduced to 20% and prior import permits are not required on items in this study, therefore, imports here included are subject to an ad valorem duty of maximum 20% assessed on the invoice value. In addition, a customs processing fee of 0.8% is assessed on the invoice value. A 10% value added tax (recently reduced from 15%) is then assessed on the cumulative value of both taxes in addition to the invoice value.

There are no official metric requirements applicable to imports into Mexico. However, since the metric system of units is, by law, the official standard of weights and measures in Mexico, importers will usually require metric labeling for packaged goods, although the English system is also used. Dual labeling is acceptable. Imported products should be labeled in Spanish containing the following information: name of the product, trade name and address of the manufacturer, net contents, serial number of equipment, date of manufacture, electrical specifications, precautionary information on dangerous products, instructions for use, handling and/or product conservation and mandatory

standards. Mexico adheres to the International System of Units (SI). Electric power is 60 cycles with normal voltage being 110, 220 and 400. Three phase and single phase 230 volt current is also available.

Prepared by:
Caroline Vérut
for the Canadian Embassy
Mexico City
June 1992

APPENDIX I: INDUSTRIAL CHAMBERS AND ASSOCIATIONS

**ASOCIACION MEXICANA DE EMPRESAS DEL RAMO DE
INSTALACIONES PARA LA CONSTRUCCION, A.C. (AMERIC)**
MEXICAN ASSOCIATION OF ENTERPRISES SPECIALIZING IN THE
INSTALLATION OF CONSTRUCTION MATERIALS

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**ASOCIACION MEXICANA DE FABRICANTES DE CONDUCTORES
ELECTRICOS , A.C. (AMEFACE)**
MEXICAN ASSOCIATION OF MANUFACTURERS
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ASOCIACION MEXICANA DE FABRICANTES DE FIBROCEMENTO, A.C.
MEXICAN ASSOCIATION OF FIBERCEMENT MANUFACTURERS

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06040 México D.F.
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**ASOCIACION MEXICANA DE INDUSTRIAS DE TUBERIAS
PLASTICAS, A.C. (AMITUP)**
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ASOCIACION NACIONAL DE FABRICANTE DE CAL, A.C.
NATIONAL ASSOCIATION OF LIME MANUFACTURERS
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**CAMARA NACIONAL DE COMERCIO, SERVICIOS Y TURISMO DE LA
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NATIONAL CHAMBER OF COMMERCE, SERVICES AND TOURISM
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**CAMARA NACIONAL DE LA INDUSTRIA DEL HIERRO
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CENTRO IMPULSOR DE LA CONSTRUCCION Y LA HABITACION, A.C. (CIHAC)

PROMOTION CENTER FOR CONSTRUCTION AND HOUSING

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MEXICAN INSTITUTE OF CEMENT AND CONCRETE

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**Contact: Dr. José Antonio Nieto
Director General**

APPENDIX II- POTENTIAL DISTRIBUTORS AND REPRESENTATIVES

ACEROS CAMESA, S.A. DE C.V.
 Margarita Maza de Juárez 154
 Col. Nva. Industrial Vallejo
 Phone: 754-14-00 754-50-11
 Fax: 586-77-99
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 Gerente de Compras
 (steel cable)

ACEROS CONSOLIDADA, S.A. DE C.V.
 Ing. Eduardo Molina 1244-1300
 Col. Granjas Modernas
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 Jefe de Compras
 (steel)

ACEROS FORTUNA, S.A. DE C.V.
 Juan Fernández Albarrán 31
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 Contact: Srta. Ma. Guadalupe Alonso
 Gerente de Compras
 (prime rim wire rod)

AP DE MEXICO, S.A. DE C.V.
 Km. 9.5 Carr. a Sn. Luis Potosí
 Parque Industrial Benito Juárez
 76000 Querétaro, Qro.
 Phone: (91-773) 802-42 803-36 801-44
 Fax: (91-773) 803-31
 Contact: Ing. Gabriel Vargas
 Jefe de Abastecimientos
 (iron & steel tubing & sheets)

ATSUGI MEXICANA, S.A. DE C.V.

Av. del Parque 8
Parque Industrial Lerma
52000 Lerma, Mex.

Phone: (91-728) 509-55 508-31
Fax: (91-728) 506-34
Contact: Sr. Juan Romero
Jefe de Importaciones
(electric materials)

BOCAR, S.A.

Cruz Verde 169-1A
Col. Los Reyes
04330 México D.F.

Phone: 689-75-96
Fax: 549-34-59
Contact: Ing. Carlos Paredes
Jefe de Compras
(steel, screws, aluminium, machinery)

BTICINO DE MEXICO, S.A. DE C.V.

Mariano Escobedo 456 - Piso 7
Col. Anzures

11590 México D.F.
Phone: 584-38-77
Fax: 584-30-91
Contact: Srta. Marcela Riolobos S.
Gerente de Compras
(electric materials)

BURNDY MEXICO, S.A. DE C.V.

Calle del Río 12
Fracc. Alce Blanco
53370 Naucalpan, Mex.

Phone: 576-23-00
Fax: 576-31-69
Contact: Lic. Antonio Vargas Escobar
Jefe de Compras de importación
(connectors, shapes)

CELULOSA DE CHIHUAHUA, S.A.

Domicilio Conocido
31600 Cd. Anáhuac, Chih.

Phone: (91-158) 502-00 501-72
Fax: (91-158) 502-02 504-63
Contact: Ing. Francisco Ceseña C.
Gerente de Compras
(pumps, valves, copper, aluminium, PVC)

CERAMICA SANTA JULIA

Insurgentes Sur 263
Col. Roma Norte
06700 México D.F.
Phone: 264-08-23
Fax: 264-55-62
Contact: Lic. Eduardo Alba
Gerente de Ventas
(Ceramic tiles & floors)

CIMENTACIONES Y EDIFICACIONES, S.A. DE C.V.

Autopista México Querétaro 3130
54030 Tlalnepantla, Mex.
Phone: 379-64-00
Fax: 370-26-31
Contact: Sr. Hans Van Der Vrink
Gerente de Finanzas
(Construction equipment and tools)

CLEVITE DE MEXICO, S.A. DE C.V.

Sta. Rosa - Lotes 18 al 21 - Manzana 19
Parque Industrial
52000 Lerma, Mex.
Phone: (91-728) 809-44 801-30
Fax: (91-728) 511-71
Contact: Sr. Rafael González
Gerente de Compras
(Equipment and tools)

CONSORCIO EN INGENIERIA FABRICANTES, S.A. DE C.V.

Av. Jardín - Manzana 10 - Lotes 15 y 16
Parque Industrial
52000 Lerma, Mex.
Phone: (91-728) 511-54 534-21
Fax: (91-728) 518-39
Contact: Ing. Edgar Pulido
Gerente de Compras
(structural materials, electric materials, steel)

CONSORCIO INDUSTRIAL, S.A. DE C.V.

Km. 1.8 Carr. Tlaln. - Cuautitlán
Col. San Rafael
54120 Tlalnepantla, Mex.
Phone: 565-02-55
Fax: 390-12-67
Contact: Lic. Virgilio González R.
Subdirector de abastecimiento
(steel, tubing, connectors, screws)

CONSTRUCCIONES PROTEXA, S.A.
Carr. Monterrey-Salttillo Km. 339
64000 Sta. Catarina, N.L.
Phone: (91-83) 36-30-30 y 40
Fax: (91-83) 36-29-64
Contact: Sr. Jaime de la Rosa
Jefe de Compras
(heavy construction materials)

CONSTRUCTORA BERMUDEZ, S.A. DE C.V.
Fray Pedro de Gante 6820
Col. San Lorenzo
32320 Ciudad Juárez, Chih.
Phone: (91-16) 17-00-49 17-02-09
Fax: (91-16) 17-28-88
Contact: Sr. J.L. Vera Castañeda
Auxiliar Administrativo
(electric & plumbing materials)

CONSTRUCTORA LOBEIRA, S.A. DE C.V.
Guaymas 301 - Int. 1
67110 Sn. Nicolás de los Garza, N.L.
Phone: (91-83) 77-71-00 77-21-24
Fax: (91-83) 77-77-91
Contact: Lic. Nancy Méndez M.
Jefe de Compras
(electric materials, air conditioning)

CONSTRUCTORA MAIZ MIER, S.A.
Matamoros 506 Ote. - Altos
Centro
64000 Monterrey, N.L.
Phone: (91-83) 44-85-10 40-85-37
Fax: (91-83) 44-06-62 40-59-39
Contact: Sr. Raúl Verduzco
Superintendente de Compras
(road construction equipment)

CONSTRUCTORA Y URBANIZADORA NACIONAL, S.A.
Fray Pedro de Gante 6820
Col. Sn. Lorenzo
32320 Cd. Juárez, Chih.
Phone: (91-16) 17-12-57 17-00-49
Fax: (91-16) 17-28-88
Contact: Sr. Juan Rodríguez
Gerente de Compras
(special construction materials)

COREV DE MEXICO, S.A. DE C.V.

Insurgentes Sur 813 - Piso 9

Col. Nápoles

03810 México D.F.

Phone: 543-39-91 543-02-25

Fax: 543-23-68

Contact: Lic. Hernando Suárez

Encargado de Importaciones

(texturized coverings, paints, varnishes, waterproofing)

CORPORACION DE CONSTRUCCIONES DE CAMPECHE, S.A. DE C.V.

Blvd. Miguel C. Saavedra 157 - Piso 7

Col. Granada

11520 México D.F.

Phone: 254-05-11

Fax: 254-83-81

Contact: Ing. Fernando Fermán V.

Gerente de Compras

(construction materials)

CROUSE HINDS DOMEX, S.A. DE C.V.

Javier Rojo Gómez 1170

Col. Guadalupe del Moral

09850 México D.F.

Phone: 686-00-66

Fax: 686-37-37

Contact: Srta. Norma Gálvez

Encargada de Compras

(fuses, tubing, PVC, cable, bronze)

CYANAMID DE MEXICO, S.A. DE C.V.

Calz. de Tlalpan 3092

Col. Sta. Ursula Coapa

04910 México D.F.

Phone: 677-34-51 677-00-11

Fax: 677-12-46

Contact: Sr. Serafín López

Encargado de Importaciones

(plastic sheets)

DICA, S.A. DE C.V.

Insurgentes Sur 686 - P.H.

Col. del Valle

03100 México D.F.

Phone: 543-39-74 536-40-60

Fax: 682-94-20

Contact: Arq. Pedro Maldonado

Jefe de Compras

(machinery, pumps, tubing, valves)

EPN - SISTEMAS, S.A. DE C.V.

Av. 1o. de Mayo 110

54800 Cuautitlán, Mex.

Phone: 872-17-91 y 99

Fax: 872-18-68

Contact: Ing. Abraham Hernández
Gerente de Materiales y Compras
(tubing, hardware)

EXITO, S.A.

Purcell Norte 1063,

Col. Centro

25000 Saltillo, Coah.

Phone: (91-841) 277-26

Fax: (91-841) 490-07

Contact: Sr. Vicente Frías
Jefe de Compras
(adhesives, cable)

FABRICACIONES, INGENIERIA Y MONTAJES, S.A. DE C.V.

Viaducto Río Becerra 27 - Piso 1

Col. Nápoles

03810 México D.F.

Phone: 536-03-66

Fax: 687-63-24

Contact: Sr. Alfonso Zárate de la Vega
Gerente de Compras
(structural shapes, paints)

FEDERAL PACIFIC ELECTRIC DE MEXICO, S.A. DE C.V.

Oriente 233 # 341

Col. Agrícola Oriental

08500 México D.F.

Phone: 763-10-33

Fax: 758-72-47

Contact: Ing. Octavio Ascoitia M.
Gerente de Compras
(electric materials)

FERRETERIA NONOALCO, S.A. DE C.V.

Insurgentes Norte 554

Col. Atlampa

06450 México D.F.

Phone: 547-75-60

Fax: 547-27-02

Contact: Lic. Alberto Aguilar López
Importaciones
(steel)

FILTRAM, S.A. DE C.V.
Gral Pablo A. González 500 Pte.
Col. San Jerónimo
64640 Monterrey, N.L.
Phone: (91-83) 47-30-33 al 39
Fax: (91-83) 47-29-06
Contact: Ing. Carlos de la Garza
Jefe de Abastecimiento
(steel, filters)

FRANCISCO BAUTISTA, S.A. DE C.V.
Filiberto Gómez 38
Col. Zona Industrial
54030 Tlalnepantla, Mex.
Phone: 390-79-00
Fax: 390-77-05
Contact: Sr. Julio César Fernández
Contralor General
(steel, sheets)

GRUPO FUERZA
Año de Juárez 205
Col. Granjas San Antonio
09070 México D.F.
Phone: 685-16-61 685-17-94
Fax: 686-70-06
Contact: Ing. Jorge Orlando Martínez
Gerente de Compras
(steel)

GRUPO LACOSA, S.A. DE C.V.
Monte Elbruz 134 - P.H.
Col. Lomas de Chapultepec
11000 México D.F.
Phone: 540-61-61
Fax: 202-66-74
Contact: Ing. Emilio Mercado
Gerente General
(cement, concrete)

GRUPO MESA, S.A. DE C.V.
Puebla, Pue.
Phone: (91-22) 35-40-29 35-41-52
Fax: (91-22) 36-82-66
Contact: Ing. Hans Peter Averdung
Director General
(steel, aluminium)

GRUPO MEXICANO INDUSTRIAL Y DE DESARROLLO
Carr. México - Toluca Km. 40
05000 Cuajimalpa, D.F.
Phone: 812-34-09 812-42-07
Fax: 812-42-08
Contact: Ing. Gonzalo Flores
Gerente de Compras
(construction materials)

GRUPO TOLTECA, S.A. DE C.V.
Av. Tolteca 203
Col. San Pedro de los Pinos
01180 México D.F.
Phone: 277-24-44
Fax: 271-25-05
Contact: Srta. Irma Herrera
Encargada Importaciones
(cement)

HARPER-WYMAN DE MEXICO, S.A. DE C.V.
Av. de los Constituyentes 635
Col. 16 de Septiembre
11810 México D.F.
Phone: 271-37-12 271-30-41
Fax: 272-27-12
Contact: Sra. Agustina Rodríguez C.
Gerente de Compras
(screws, steel)

HYLSA, S.A.
Jaime Balmes 11 - Torre D - Piso 3
Col. Los Morales
11510 México D.F.
Phone: 395-59-00 395-59-80
Fax: 395-58-08
Contact: Ing. Felipe Cortés
Director General
(reinforcing bars)

HW FLIR DE MEXICO, S.A. DE C.V.
Poniente 128 #672
Col. Industrial Vallejo
02300 México D.F.
Phone: 567-64-00
Fax: 567-93-34
Contact: Ing. Javier Raya M.
Director General
(cement)

IDEAL STANDARD, S.A. DE C.V.
Félix Guzmán 21
Col. El Parque
53390 Naucalpan, Mex.
Phone: 557-60-21 557-60-66
Fax: 395-10-75
Contact: Sr. Miguel Angel Rodríguez
Contralor
(sanitary articles, hardware)

IMPORTACIONES HALCON, S.A. DE C.V.

Abasolo 176
Col. del Carmen Coyoacán
04100 México D.F.
Phone: 554-14-97 658-15-37
Fax: 554-45-93
Contact: Sr. Miguel Angel Alarcón I.
Director

(tiles)

IMPORTACIONES Y REPRESENTACIONES ISEL, S.A. DE C.V.

Lázaro Cárdenas 369-3
Col. Atenor Sala
03010 México D.F.
Phone: 519-30-53 519-33-61
Fax: 530-25-78
Contact: Sr. Jorge Frid
Gerente

(hardware, locks)

INDUSTRIAS C.M., S.A.

Av. Conductores 505 Ote.
66493 Sn. Nicolás de los Garza, N.L.
Phone: (91-83) 79-20-00 79-20-44
Fax: (91-83) 77-75-33 79-58-10
Contact: Sr. Sergio Tavera D.
Jefe de Abastecimientos

(cable)

INDUX, S.A. DE C.V.

Laminadora 37
Col. Bellavista Tacubaya
01140 México D.F.
Phone: 272-20-99 271-50-79
Fax: 277-34-45
Contact: Srta. Elvira Bonola
Gerente de Compras

(steel, aluminium)

INGENIO CONSTANCIA, S.A. DE C.V.

Rubén Darío 69
Col. Chapultepec Morales
11570 México D.F.
Phone: 545-08-18 545-27-51
Fax: 254-43-19
Contact: Sra. Garbiñe Echeverría
Jefe de Compras

(steel, electric materials)

KEBEKIM, S.A. DE C.V.
Insurgentes Sur 1677-1001
Col. Guadalupe Inn
01020 México D.F.
Phone: 524-62-86 524-13-85
Fax: 534-67-07
Contact: Sr. Jaime Klapp
Director General
(asbestos fibre)

LA CANTABRA, S.A. de C.V.
Av. Industria 82
Col. Moctezuma - 2a. Sección
15500 México D.F.
Phone: 784-10-33
Fax: 784-13-01
Contact: Ing. Luis Arroyuelo Masso
Director General
(glass & aluminium)

LINOLEUMS LA NUEVA AVENIDA, S.A. DE C.V.
Enrique Wallon 438 - Piso 3
Col. Polanco
11560 México D.F.
Phone: 255-36-07 250-77-57
Fax: 203-25-42
Contact: Sr. Abraham Mizhraki
Encargado de Importaciones
(carpets, linoleum, floor coverings, blinds)

MEXALIT, S.A. DE C.V.
Horacio 1855-502
Col. Polanco
11510 México D.F.
Phone: 202-41-33
Fax: 202-51-46
Contact: Sr. J.R. Muñoz
Jefe de Exportación e importación
(tubing)

NACIONAL DE CONDUCTORES ELECTRICOS, S.A. DE C.V.
Poniente 140 # 720
Col. Industrial Vallejo
02300 México D.F.
Phone: 587-70-11
Fax: 587-58-44
Contact: Lic. Marcela Moncada
Coordinadora de Importaciones
(PVC, aluminium)

NICHIMEN DE MEXICO, S.A. DE C.V.

Sevilla 4 - Piso 9

Col. Juárez

06600 México D.F.

Phone: 525-16-11 al 15

Fax: 511-41-60

Contact: Sr. Toshihiko Matsuura
Gerente de Ventas

(steel, sheets, acble)

O.H. INTERNACIONAL

Avena 200-B

Col. Granjas México

08400 México D.F.

Phone: 657-67-71 657-64-82

Fax: 650-76-00

Contact: Francisco Holguin H.
Presidente

(ceramic floors)

OPERADORA DE COMERCIO UNIVERSAL, S.A. DE C.V.

Vía Morelos 224

Col. Sta. Ma. Tulpetlac

55400 Ecatepec, Mex.

Phone: 775-73-52 775-74-69

Fax: 775-99-77

Contact: Lic. Héctor Sánchez
Gerente de Comercialización

(refractory bricks)

PEERLES TISA, S.A.

Félix U. Gómez 2223 Nte.

Col. Reforma

64550 Monterrey, N.L.

Phone: (91-83) 74-18-00 75-46-30

Fax: (91-83) 74-29-52

Contact: Sr. Juan Vega H.
Gerente de Compras

(tubing, stainless steel)

PORCELANITE, S.A. DE C.V.

Vidrio 8

Sta. Clara

55540 Ecatepec, Mex.

Phone: 569-64-77 755-84-44

Fax: 569-14-39

Contact: Sr. Fernando Avila
Jefe de Compras

(materials for the manufacture of tile floors)

TECNOCRETO, S.A. DE C.V.

Blvd. Manuel Avila Camacho 80 - Piso 3

Col. El Parque

53390 Naucalpan, Mex.

Phone: 557-55-44

Fax: 395-79-03

Contact: Ing. Claudio R. Calzado W.
Director General

(waterproofing, special materials for construction)

SMITH KLINE & FRENCH, S.A.

Universidad 1449

Col. Florida

01030 México D.F.

Phone: 534-80-40

Fax: 534-82-57

Contact: Lic. Rolando Zamora Oliveros
Jefe de Compras

(gum, colours, varnishes, solvents)

SOLVENTES Y PRODUCTOS QUIMICOS, S.A.

Presidente Mazaryk 101-1301

Col. Polanco

11570 México D.F.

Phone: 254-78-00

Fax: 203-11-64

Contact: Srta. Patricia Ballesteros
Encargada de Importación

(thinner)

TEX LAMEX, S.A. DE C.V.

Industria Nacional 2

53370 Naucalpan, Mex.

Phone: 576-83-44

Fax: 576-17-61

Contact: Ing. José María Manzanares
Gerente de Compras

THYSSEN MARATHON, S.A. DE C.V.

Insurgentes Sur 1088

Col. del Valle

03210 México D.F.

Phone: 559-47-33

Fax: 575-98-73

Contact: Sr. Leonardo Osorio
Compras de Importación

(steel, stainless steel sheets)

TILE MARKET COMPANY, S.A.

Blvd. Salinas 4603

Fracc. Aviación

22500 Tijuana, B.C.N.

Phone: (91-66) 86-15-90

86-57-05

Fax: (91-66) 81-71-02

Contact: Miguel Fernández Arnold

Director General

(floor coverings, marble, tiles, bathroom furniture)

WALLACE & TIERNAN DE MEXICO, S.A. DE C.V.

Vía López Portillo 321

Col. Sta. Ma. Cuauhtemoc

54900 Tultitlán, Mex.

Phone: 875-21-77

874-96-11

Fax: 875-55-66

Contact: Sr. Abelaido Guerrero

Encargado de Compras

(plastic tubing, connectors, valves)

WALLACE & TIERNAN DE MEXICO, S.A. DE C.V.
Verat, Cuauhtemoc
Market place in the Mexican market
for plastic tubing, connectors and material
(1988)

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DOCS

CA1 EA953 92M17 ENG

Verut, Caroline

Market study on the Mexican market
for building products and material

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