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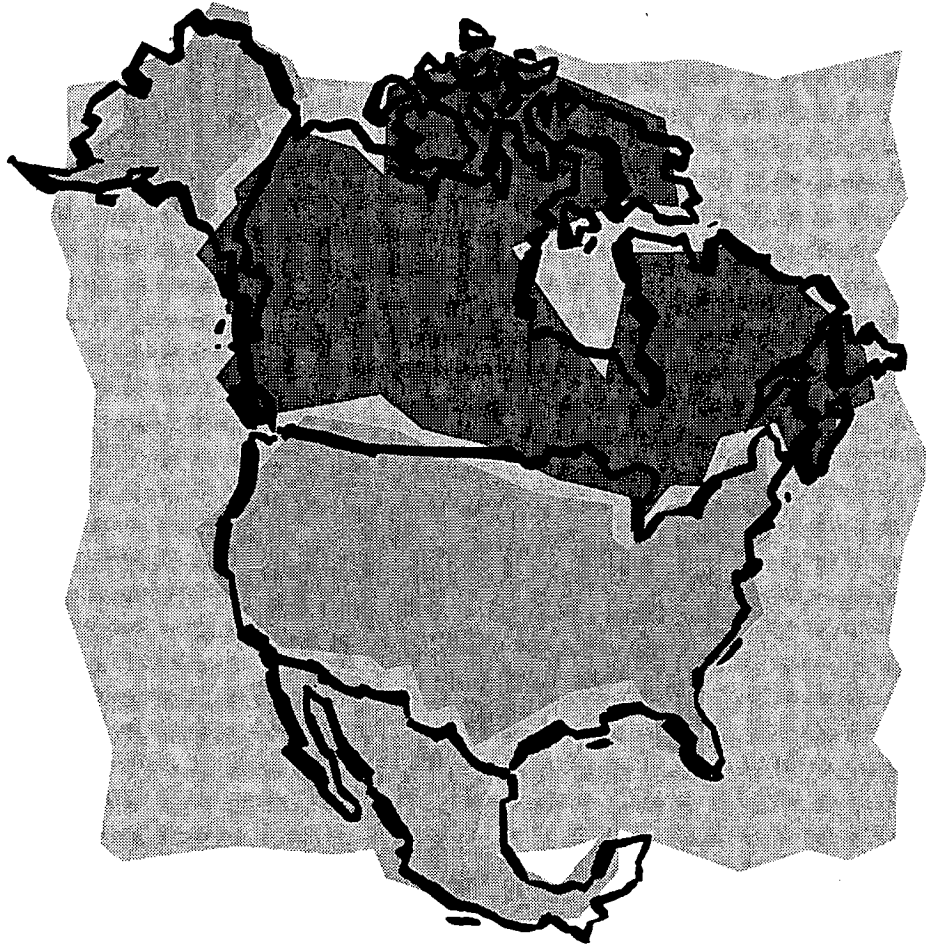
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BOTTLED
DRINKING
WATER



MEXICO MARKET PROFILE

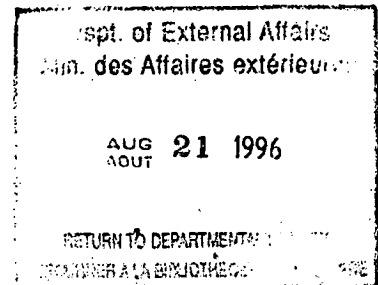


BOTTLED DRINKING WATER

Department of Foreign Affairs
and International Trade

Canadian Embassy
Mexico
February 1992

(Disponible également en français)



43-277-159

READER SURVEY

HELP US TO SERVE YOU BETTER

We are interested in your views on this publication. Please take a few minutes to respond to the questions below.

1. What is your overall opinion of this publication?
 - very useful
 - useful
 - moderately useful
 - not useful
2. Please provide your assessment of each of the following aspects of this publication.
 - a) Quality of text discussion (mark one only):
 - excellent
 - good
 - fair
 - poor
 - b) Presentation of information (mark one only):
 - excellent
 - good
 - fair
 - poor
 - c) Use of graphics and other visual aids (mark one only):
 - excellent
 - good
 - fair
 - poor
3. If this publication were updated, revised and re-issued in the future, would you be interested in receiving a copy?
 - yes, very interested
 - probably interested
 - no, not interested
 - not sure
4. How did you find the structure and format of this publication?
 - clear and easy to follow
 - confusing and difficult to follow
5. For your purposes, did this publication provide a sufficiently complete treatment of the subject(s) reviewed?
 - yes, definitely
 - to some extent
 - no
 - can't say/don't know
6. This publication would have been more useful to me if it had (mark all that apply):
 - provided more qualitative information
 - provided less quantitative information
 - made greater use of graphs, charts and tables
 - contained a longer textual discussion
 - contained a shorter textual discussion
 - used more examples, case studies, company profiles
7. In your opinion, was there important information missing from this publication?
 - yes — please specify:

8. Are there any issues relevant to the subject of this publication that you would like to have seen covered in more detail?

9. Please offer any suggestions for improving the next version of this publication.

10. Will this publication assist you in your business development?
 - yes
 - no
11. a) Does your company currently export?
 - Yes, go to 11b)
 - No, go to 11c)

b) If yes, to which foreign markets?
 U.S.A. Europe Japan
 Mexico Latin America
 Other (please specify) _____

c) If not, are you planning to export within the next 12 months?
 Yes, where?
 U.S.A. Europe Japan
 Mexico Latin America
 Other (please specify) _____
12. What is the approximate size of your company?
 - under \$1 million
 - \$1 million to \$5 million
 - \$5 million and \$10 million
 - over \$10 million

Please return the completed survey by fax to (613) 943-8806 or to the address below:

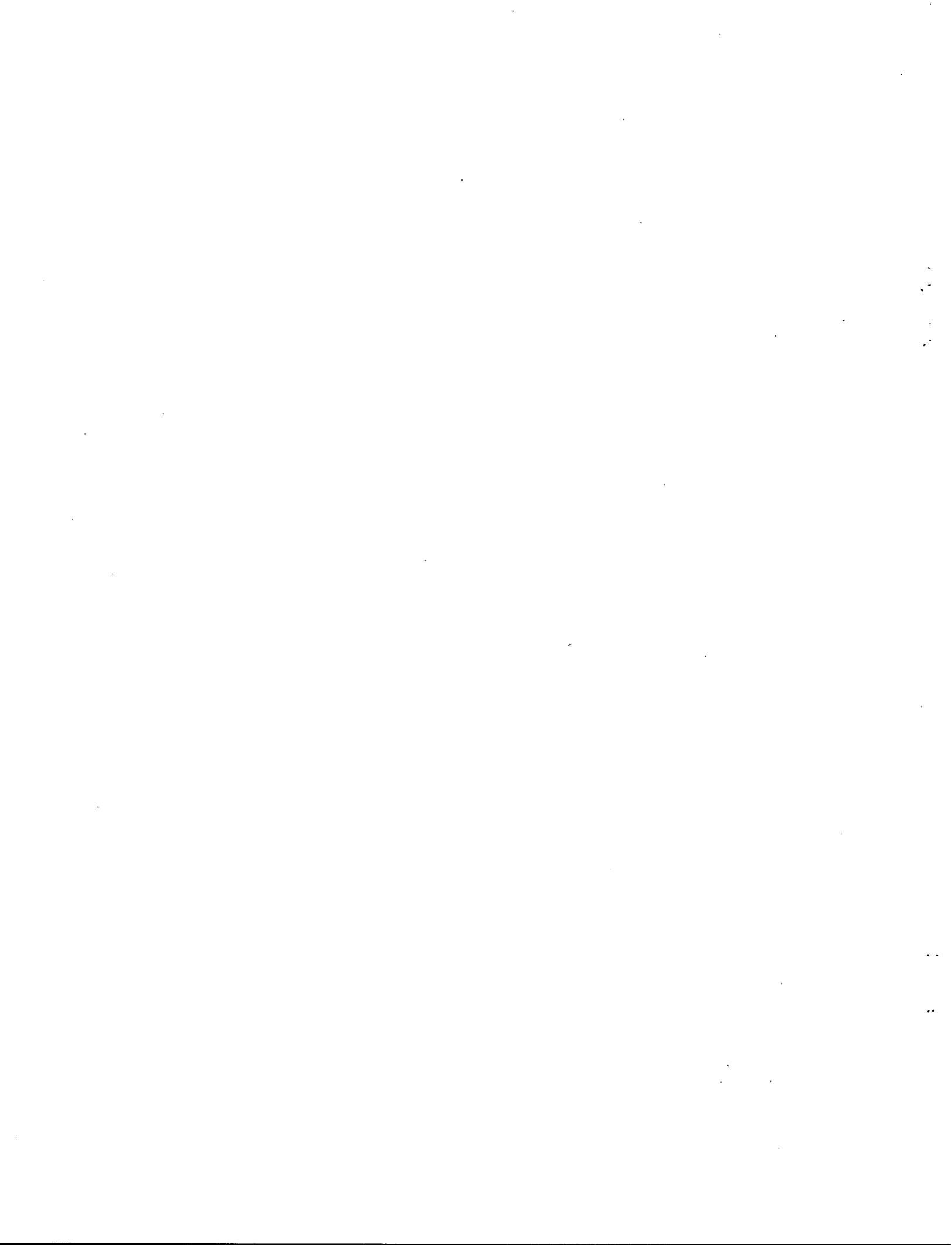
Latin America and Caribbean Trade Division
Department of Foreign Affairs and International Trade
Lester B. Pearson Bldg., 125 Sussex Drive
Ottawa, Ontario K1A 0G2

BOTTLED DRINKING WATER



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INTRODUCTION

Mexico is a federal-representative democratic republic with a land area of just under 2 million square kilometres, about one-fifth the size of Canada. It is divided into 31 states and a Federal District in which the capital, Mexico City, is located.

According to preliminary figures from the 1990 population census (see Table 1), there are approximately 81 million inhabitants in Mexico, 10 percent of whom reside in the Federal District. If the municipalities adjacent to Mexico City are taken into consideration, the number practically doubles.

Table 1: Population

States	Population	Men	Women
Aguascalientes	719,650	350,732	368,918
Baja California	1,657,927	832,123	825,804
Baja California Sur	317,326	161,784	155,542
Campeche	528,824	265,902	262,922
Coahuila	1,971,344	979,522	991,822
Colima	424,656	210,318	214,338
Chiapas	3,203,915	1,602,409	1,601,506
Chihuahua	2,439,954	1,214,005	1,225,949
Federal District	8,236,960	3,942,498	4,294,462
Durango	1,352,156	667,000	685,156
Guanajuato	3,980,204	1,928,191	2,052,013
Guerrero	2,622,067	1,284,763	1,337,304
Hidalgo	1,880,632	926,763	953,869
Jalisco	5,278,987	2,556,637	2,722,350
State of Mexico	9,815,901	4,838,738	4,977,163
Michoacán	3,534,042	1,708,424	1,825,618
Morelos	1,195,381	584,954	610,427
Nayarit	816,112	407,369	408,743
Nuevo León	3,086,466	1,537,997	1,548,469
Oaxaca	3,021,513	1,480,050	1,541,463
Puebla	4,118,059	2,005,977	2,112,082
Queretaro	1,044,227	513,257	530,970
Quintana Roo	493,605	255,476	238,129
San Luis Potosí	2,001,966	987,588	1,014,378
Sinaloa	2,210,766	1,106,532	1,104,234
Sonora	1,822,247	915,585	906,662
Tabasco	1,501,183	750,305	750,878
Tamaulipas	2,244,208	1,112,105	1,132,103
Tlaxcala	763,683	376,242	387,441
Veracruz	6,215,142	3,075,679	3,139,463
Yucatán	1,363,540	674,187	689,353
Zacatecas	1,278,279	625,424	652,855
Total	81,140,922	39,878,536	41,262,386

Source: INEGI, XI Censo General de Población y Vivienda, 1990

Prior to Mexico's accession to the General Agreement on Tariffs and Trade (GATT), during the administration of President Miguel de la Madrid Hurdato (1982-1988), there were few imports of bottled (natural and/or carbonated) water. The demand, consisting mainly of carbonated spring water and potable water further treated by ultra-

violet, reverse osmosis and other processes, was met by domestic bottlers.

It has often been stated that there is a serious shortage of fresh water in Mexico. This may be true in some desert regions where rainfall is scarce and where there are periodic long dry spells. However, there are many underground bodies of water in various regions. Some of these are high in sulphur content and are not fit for human consumption, or are used for recreational purposes or spas. Nonetheless, in several Mexican states, underground springs have supplied fresh water and have been exploited for many years by domestic bottling companies.

IMPORT MARKET

Initially, the import market has been dominated by the United States. In 1985, the value of imported bottled water supplied by that country amounted to only U.S.\$784; in 1988, the United States accounted for 95.5 percent of the total import value of U.S.\$102,606. Pure mineral water imports more than quadrupled in 1989, but France had become the dominant supplier, accounting for 63.6 percent of the total import value. The United States supplied only 16.8 percent. In 1990, these percentage positions had remained fairly constant.

The past few years have seen a proliferation of brands from other nations entering the market at the commercial level, including products from Germany, Italy, France, Spain and Israel. Domestic bottlers have also stepped up their production of bottled drinking water, both mineral and purified, in response to the competition from foreign suppliers and the consumer demand for healthier products.

There have also been significant increases in the import of sweetened and/or flavoured mineral and carbonated water, which more than doubled in 1990 over the previous year. The United States predominates in this market, accounting for 97.5 percent in 1989 and 97.90 percent in 1990.

Table 2: Mexican Imports of Bottled Drinking Water (U.S.\$)

	1989	1990
Pure, natural mineral water	600,394	652,872
Carbonated mineral water	223,207	502,817
Potable water	142,357	545,984
Mineral and carbonated water, sweetened and/or flavoured	2,757,348	5,912,268

Source: *Secretaría de Comercio y Fomento Industrial*

INTERNATIONAL TRADE POLICY

Mexico became a member of the GATT in September 1986, subject to reciprocal tariff treatments with other member nations. As a founding member of the former Latin American Free Trade Area (LAFTA), revised in 1980 as the Latin American Association of Integration (ALADI), Mexico exchanges certain preferences with other ALADI member countries.

Mexico and Canada signed a reciprocal trade treaty in 1946 and Mexico enjoys Most Favoured Nation Treatment on Mexican commodities entering Canada. In July 1974, Canada extended further special treatment to Mexico under the General Preferential Tariff ruling. This allowed for a wider spectrum of Mexican natural and manufactured goods to enter Canada at reduced tariff rates. In 1988, both Mexico and Canada adopted the harmonized customs system currently in use.

As of May 1989, Mexican *ad valorem* import duties range from a minimum of 5 percent to a maximum of 20 percent. Some commodities are exempted from import duty payment.

IMPORT DUTIES AND VAT

Classifications for drinking water under the Harmonized System are as follows: 22.01.1001, mineral water; 22.01.1002, carbonated water; 22.01.9001, potable water; 22.02.1001, sweetened and/or flavoured mineral and/or carbonated water.

These commodities are subject to a 20 percent *ad valorem* duty. A 10 percent value-added tax and customs broker charges are applicable to imports of

simple non-mineral, non-carbonated purified (potable) water.

DISTRIBUTION

Imported bottled water is distributed in the wholesale market by importers, distributors or representatives of foreign suppliers. These companies sell to retail outlets that include supermarket chain stores, department stores, restaurants, hotels and tourist resorts. Bottled drinking water of domestic origin is distributed throughout the country by means of distributorships established by individual companies or concessions that handle a variety of brands by volume. Appendix A identifies the Mexican companies that import and distribute bottled drinking water, the companies they represent and the countries of origin.

DOING BUSINESS IN MEXICO

Careful preparation is essential for success in the Mexican marketplace and a visit to the nearest International Trade Centre is a good starting point to obtain preliminary information. The following sections will indicate some of the aspects that should be carefully considered.

IMPORT REQUIREMENTS

Food and beverage products are not required to carry a registration number. However, the importer or representative should send a written notice to the Ministry of Health that the product is being presented for sale in the marketplace. In this way, it can be determined whether or not a product stands up to consumer preferences and should remain in the market. Send the notices to:

Dirección General de Control
Sanitario de Bienes y Servicios
Secretaría de Salud
Donceles No. 39, Piso 1
Col. Centro
06010 México, D.F.
Tel: (5) 510-3999 / 512-9283 / 521-3050

Products may be sold with their original labels affixed. It is still necessary, however, for the foreign supplier and the importer to be identified. This is

normally done by the importer, who places a sticker on each individual package, can or bottle, in Spanish, and containing the producer's and/or the exporter's name and address, and the importer's name and address, country of origin and other relevant data.

FINANCIAL ARRANGEMENTS

Mexico does not exercise any control over the transfer of foreign exchange outside the country. Irrevocable letters of credit, bank drafts, money transfers or any other accepted means of payment are readily available through the banking system or money exchange houses.

To give the economy more dynamism and efficiency and enable it to respond to the challenges of the North American Free Trade Agreement (NAFTA), the present administration has instituted a process to re-privatize the national banking system. At this writing (February 1992), 11 of 18 banks have been sold back to the private sector.

DOCUMENTATION REQUIREMENTS

Canadian exporters should request detailed instructions from their Mexican customers about documentation requirements. The adherence to such instructions will greatly facilitate the transit of goods through Mexican customs and into the country. Failure to comply can result in fines, demurrage costs due to delays at the border and, in extreme cases, the return of goods to the point of origin.

Mexican companies must apply for and obtain sanitary and/or phytosanitary rulings from the respective ministries for food, animal and plant products prior to importing goods. Copies of these regulations accompanying shipping papers will usually facilitate border inspection, clearance and entry.

Commercial invoices must be prepared in Spanish (original and seven copies) and visaed at the Mexican Embassy or Consulate in Canada. Bills of lading for ocean, rail, road and air shipment are also required. If the invoice is written out in a language other than Spanish, a translation signed by the exporter, consignee or customs broker and attached to the invoice will be accepted by Mexican customs.

Experienced Mexican importers can usually provide the exporter with the name of a customs broker to whom the goods should be consigned. The broker will take responsibility for clearing the goods through customs and forwarding to the final destination.

QUOTATIONS AND PAYMENT

Unless otherwise indicated by the importer, price quotations should be given in U.S. dollars. The usually accepted modes are F.O.B. plant plus freight, F.O.B., C.I.F. or C.A.F. mid-bridge or point of entry. It is the customer's responsibility to have the goods cleared through customs, pay the import duties and taxes, and transport from the border to the destination, etc.

Mexican companies should be fully informed about and agreeable to the terms and conditions of payment required by Canadian exporters. An irrevocable letter of credit is an accepted means of payment, although some importers prefer payment by instruments such as bank transfer, sight draft, cashier's cheque or international money order. These are less expensive to obtain. In any case, for their own protection, Canadian exporters should ensure that monies are in the customers' banks and available for collection on presentation of shipping documents, invoices, etc.

Foreign exchange services are readily available through the Mexican banking system.

TRANSPORT

Goods travel from Canada to Mexico primarily by truck or railcar. Several Canadian trucking firms have established contracts with Mexican counterparts to transport freight overland through the United States into Mexico. By law, a Mexican cab and driver must be used to haul loads over local highways to destinations inland. U.S. rail systems connect with Mexican road and railways systems at major border crossings. Direct air cargo services to Mexico City are available from Toronto with Canadian Airlines International and Vancouver by Japan Airlines. Chihuahua, Hermosillo, Guadalajara, Monterrey and other important Mexican cities have direct air connections with major U.S. cities.

RETAIL MARKET

Mexico's GATT membership has led to the relaxation and elimination of certain import restrictions and barriers to trade. There has been a significant increase in the variety of imported goods, including bottled drinking water. Many brands previously unknown in Mexico can be found today on super-market shelves.

The Mexican food and beverage market is in expansion and, for a product to find a niche in this highly competitive marketplace, it must be well presented and competitive in price and quality. It takes considerable effort and promotion to introduce a foreign product, and the competition in the drinking water market is strong (see Table 3).

Table 3: Retail Distribution Prices of Bottled Drinking Water
(Prices in Mexican Currency)

Brand Name	Bottle Size (l)	Superama	Aurrera	Gigante
Pellegrino	1.5	5,447		
Fonte Limpia	1.5	5,650	5,650	
Canada's Heritage	1.5	3,950		
Alpina ¹	1.5	2,850		2,945
Ambrosia	1.5		3,950 ²	4,950
Ambrosia ²	3.7	6,450		
Ambrosia ³	9.4	17,750		
Hayat ³	1.5		3,450	
Evian	1.0		4,350	
Evian ⁴	1.5		5,250	
Gabal ⁵	1.5		1,650	
Santa María	1.5		3,660	
Osmopura	1.5		2,400	
Agua Pura	1.0		1,780	
Aurrerá ²	1.5		1,700	
La Noria ¹	1.5		2,750	
Mundet ¹	1.5		2,460	
Mundet ¹	3.7		4,500	
Aguas de Sierra	1.5			2,735

Note: The survey was conducted on February 25, 1992

1. Purified water, all others are natural spring water
2. Discount sale price of 20 percent
3. Discount sale price of 10 percent
4. Discount sale price of 3.6 percent
5. Discount sale price of 3.4 percent

OTHER CONTACTS

Appendix A lists the local companies that import and distribute foreign brands of drinking water. Appendix B lists the other firms that also import and distribute food products and beverages and that may be interested in handling bottled water. Appendix C lists the Mexican bottlers and their products.

Further information can be obtained from:

Canadian Embassy
Commercial Division
Schiller 529
Col. Polanco
11580 Mexico, D.F.
Tel: (011-525) 254-3288
Fax: (011-525) 545-1769
Telex: 1771191 Answerback DMCNME

• *Appendices* •

**Appendix A – MEXICAN IMPORTERS AND DISTRIBUTORS
OF BOTTLED DRINKING WATER**

Local Company	Brand	Producer	Origin
<i>G.E.N., S.A. de C.V.</i> Cerrada Primavera No. 15 53000 Naucalpan, Edo de México Tel: (5) 350-5436	Glacier	Western Canada Water	Canada
<i>Importaciones y Representaciones Star, S.A. de C.V.</i> Río San Joaquín 724, 3 ^{ro} Piso Col. 10 de Abril 11250 México, D.F. Tel: (5) 580-0480 Fax: (5) 395-6417	Ambrosia	Premium Water Company	United States
<i>ABESA de C.V.</i> Melchor Ocampo 193, E7 Col. Verónica Anzures 11300 México, D.F.	Fonte Limpia & Pellegrino	San Pellegrino SPA	Italy
<i>Distribuidora Puig, S.A.</i> M. de Cervantes Saavedra 57 Col. Granada 11520 México, D.F. Tel: (5) 531-3551 Fax: (5) 203-5311	Perrier	Perrier	France
<i>Fomento y Representaciones Ultramar, S.A.</i> Descartes 54 - 3 Col. Anzures 11590 México, D.F.	Evian	S.A. des Eaux Minérales	France
<i>Howe, S.A. de C.V.</i> Monterrey 365 Col. Roma Sur 06760 México, D.F.	Apolinaris	Apolinaris Brunner	West Germany
<i>Jaymex de México, S.A. de C.V.</i> Centeno 833-B Col. Granjas México 08400 México, D.F. Fax: (5) 650-0613	Solares	Manantiales de Fuencaliente	Spain
<i>Gigante, S.A. de C.V.</i> Av. Ejército Nacional 769-A Col. Nueva Granada 11520 México, D.F. Tel: (5) 545-5161, 250-3011 Fax: (5) 250-9171	Fonte S. Moderrano Nevoit/Ares Ltd.	Berceto Parma	Spain Israel

• *Appendices* •

Local Company	Brand	Producer	Origin
<i>Alimentos Siral, S.A. de C.V.</i> Puente Juárez 190 54090 Tlalnepantla, Edo. de México	Canada's Heritage	Nora Beverages	Canada
<i>Cía de Comercio Exterior F.C.</i> S.A. de C.V. Emilio Castelar 230-9 Col. Polanco 11560 México, D.F.	Aguas de Sierra		Spain
<i>Jona Internacional, S.A. de C.V.</i> Blvd. Toluca 13, 1 ^{er} Piso Fracc. Alce Blanco Naucalpán, Edo. de México	Hayat		Turkey

**Appendix B – MEXICAN IMPORTERS, AGENTS, REPRESENTATIVES AND
DISTRIBUTORS OF PROCESSED FOOD AND BEVERAGES**

Ing. Eduardo Morales
Director General
SAT-COM, S.A. de C.V.
Av. Ejército Nacional 728, 3^{er} Piso
Col. Polanco
11550 México, D.F.
Tel: (5) 254-1852, 545-9593, 255-4588
Fax: (5) 531-3028

Sr. David Cherem
Petro Corporation International
Calle 5 No. 24-F
San Bartolo Naucalpán, Edo. de México
Tel: (5) 360-0231, 360-1082
Fax: (5) 562-9017

Sr. Isaac Cojab
Super Importado
Cofre de Perote 244-B
Lomas de Chapultepec
11000 México, D.F.
Tel: (5) 202-4127

Sr. Eduardo Chávez Ponce
G.I. Rubi, S.A. de C.V.
Lafayette 14
Col. Anzures
11590 México, D.F.
Tel: (5) 254-1803

Sr. Francisco Rivera Duarte
Cia. Eurolatina de Comercio,
S.A. de C.V.
Anatole France 27
Col. Polanco-Reforma
11550 México, D.F.
Tel: (5) 570-6659, 570-6679

Sr. Pablo Oria
Industrial Sidrera, S.A.
Paseo Jacarandas 328 Altos
Col. Sta María Insurgentes
06430 México, D.F.
Tel: (5) 547-9336, 547-9337
Fax: (5) 541-0557

Sr. Luis Martín Rivera
Importadora y Distribuidora Uceró,
S.A. de C.V.
Fuerza Aérea Mexicana No. 128
Col. Federal
15700 México, D.F.
Tel: (5) 762-7055, 762-8543
Fax: (5) 785-4433

Sr. Elías A. Lima
Av. Juárez No. 127-10
Col. Centro
06030 México, D.F.
Tel: (5) 535-7516, 535-7519

Sr. Vicente Ariztegui
Fimexpo, S.A. de C.V.
Plaza Necáxa No. 2-2
Col. Cuauhtémoc
06500 México, D.F.
Tel: (5) 533-6292, 533-6294
Fax: (5) 207-8599

Sr. Alfredo Chávez
Comercialización, Importación,
Exportación, S.A. de C.V.
Comté No. 135
Col. Anzures
11590 México, D.F.

Sr. Sabetay Arguete
Alimentos Laima, S.A.
Ayuntamiento No. 13
Col. Centro
06030 México, D.F.
Tel: (5) 521-7019, 521-6351, 512-4957
Fax: (5) 518-3882

Sr. Inadalecio Fernández
Sales Manager
Distribuidora Puig, S.A.
París 255
Col. del Carmen
Coyoacán, México, D.F.
Tel: (5) 554-2903, 554-8692
Fax: (5) 554-2874

Sr. Antún Suic
Comercializadora Mexicana Tomi,
S.A. de C.V.
Barranca del Muerto 525, 3^{ro} Piso
Esquina Otoño
Col. Mercéd Gómez
03930 México, D.F.
Tel: (5) 680-7315, 680-4188
368-8837, 368-8839
Fax: (5) 660-9531

Sr. Mario Zarur
El Puerto de Beirut, S.A. de C.V.
Villahermosa No. 6, 1^{er} Piso
Col. Condesa
06100 México, D.F.
Tel: (5) 277-3433, 277-3702
Fax: (5) 277-6553

Sr. John Moore
Mori Exportadora de México,
S.A. de C.V.
Adolfo Prieto 1638-B
Col. del Valle
03100 México, D.F.
Tel: (5) 524-1047, 524-1588, 563-3715
Fax: (5) 524-0128, 531-9755

Venditodo, S.A. de C.V.
Homero 502
Col. Polanco
11560 México, D.F.
Tel: (5) 255-2541
Fax: (5) 545-0207

Lomeli International Trade Centre
López Mateos Norte 400, Piso 5
Guadalajara, Jal.
Tel: (36) 163-122, 163-128, 163-127
Fax: (36) 163-171

Jaymex de México, S.A. de C.V.
Centeno 833-B
Col. Granjas México
08400 México, D.F.
Tel: (5) 650-0613
Fax: (5) 650-0613

Grupo Madonna
Venustiano Carranza 24-C
Col. Lázaro Cárdenas
Naucalpán, Edo. de Méx.
Tel: (5) 709-9526, 709-8524
Fax: (5) 709-7410

MAC'MA, S.A. de C.V.
Arroz 180
Fracc. Industrial Santa Isabel
Col. Iztapalapa
09820 México, D.F.
Tel: (5) 581-8500

Sr. David Hennessy
Director General
Importadora y Distribuidora
Medjugorje, S.A. de C.V.
Sm. 63, Lote 4, Manzana L
Calle 11 Norte
Cancún, Q. Roo, México
Tel: (988) 303-65, 727-07
Fax: (988) 307-73

Lic. José Luis Villaseñor
Pico de Tolima No. 29
Jardines de la Montaña
14210 México, D.F.
Tel: (5) 660-4504, 652-9644
Fax: (5) 568-4188

Sr. Alejandro Bretón
Purchasing Manager
Mayab Empacadora del Caribe,
S.A. de C.V.
Coruña 161
Col. Alamos
03400 México, D.F.
Tel: (5) 530-4773, 538-1361
Fax: (5) 530-4773

Sr. Salvador de la Parra
El Triunfo (c/o Cremería Cotija)
Local 2-57 Letra E
Central de Abasto
Aztapalapa, México, D.F.
Tel: (5) 694-0620, 694-2298
Fax: (5) 694-1448

**Appendix C – MEXICAN BOTTLERS OF MINERAL AND PURIFIED
DRINKING WATER**

Mineral

Agua Minerales de Coyame, S.A.
Carr. Costera del Golfo Esq. Jaime Nunó
Tel: (91-294) 300-80, 300-83
Castemaco, Ver.
Agua mineral COYAME

Articulos Mundet Para
Embotelladores, S.A.
Sabino No. 329
Tel: 541-32-40, 547-90-09
Col. Sta Ma. La Ribera
06400 México, D.F.
Sidral Mundet y otros refrescos

Balneario y Mantiales de Lourdes,
S.A. de C.V.
Francisco Zarco No. 389
Tel: (91-48) 12-31-32, 12-63-13, 14-06-05
San Luis Potosí, S.L.P.
Aguas minerales AGUAS DE LOURDES

Carta Blanca de Cd. Juarez, S.A.
Henry Dunant, No. 5155
Tels: (91-16) 16-73-01, 16-73-02, 16-73-03
Col. Progresistas
Cd. Juárez, Chih.
Agua mineral PEÑAFIEL

Casa Guajardo, S.A.
Av. Universidad Norte No. 3671
Tel: (91-83) 51-52-05
Fax: (91-83) 31-32-68
Monterrey, N.L.
Agua mineral LA FUENTE

Cerveza Corona de Guadalajara,
S.A. de C.V.
Ruiz de Alarcón No. 657
Esq. Mariano Otero
Tel: (91-36) 22-93-93, 22-90-80
Guadalajara, Jal.
Agua mineral TEHUACAN and GARCI-CRESPO

Cervezas y Refrescos de Jalapa,
S.A. de C.V.
Av. Lázaro Cárdenas No. 521
Tel: (91-281) 422-11, 522-11
Xalapa, Ver.
Agua mineral PEÑAFIEL

Codicome del Centro, S.A. de C.V.
Diagonal 14 Pte No. 3324
Tel: (91-22) 48-04-44, 48-02-19
Col. Villa San Alejandro
Puebla, Pue.
Agua mineral PEÑAFIEL

Comercial Chavez Gonzalez, S.A.
Paseo Bolivar No. 718-A
Tel: (91-14) 15-33-89, 16-65-55
Fax: (91-14) 15-28-98
Chihuahua, Chih.
Agua mineral PEÑAFIEL

Comerdis de Occidente, S.A. de C.V.
Petróleos Mexicanos No. 503
Tel: (91-491) 452-18, 454-93, 455-44,
452-27
Aguascalientes, Ags.
Agua mineral PEÑAFIEL

Cia. Topo-Chico, S.A.
Salinas No. 1417
Tel: (91-83) 76-90-00
Col. Topo Chico
64260 Monterrey, N.L.
Embotelladores de agua mineral
TOPO CHICO

Distribuidora de Xalapa, S.A. de C.V.
Av. Lázaro Cárdenas y Rafael Valenzuela
Tel: (91-281) 517-23, 511-88, 517-77
Col. Rafael Lucio
Xalapa, Ver.
Agua mineral de TEHUACÁN y GARCI CRESPO

Distribuidora Peñafiel, S.A.
Norte 31-A No. 60
Tel: 587-10-22
Col. Nva. Industrial Vallejo
07700 México, D.F.

Distribuidora SABE, S.A.
Priv. Citlaltépetl No. 2306
Tel: (91-22) 40-16-43
72090 Puebla, Pue.
Agua mineral de manantial
ETIQUETA AZUL

Embotelladora Aguascalientes, S.A.
Av. de la Convención de 1914 Sur No. 1102
Tel: (91-491) 544-88
Aguascalientes, Ags.
Agua mineral de Tehuacán EL RIEGO

Embotelladora GARCÍ CRESPO, S.A.
Campos Eliseos No. 345-14 Piso
Tels: 202-30-52, 259-17-68
11560 México, D.F.
Embotelladores de agua mineral gasificada y
natural de sabor y kina

Embotelladora La Favorita, S.A.
Av. Vallarto No. 3300
Tel: (91-36) 16-62-10, 16-62-11, 16-62-19
Guadalajara, Jal.
Agua mineral de TEHUACÁN EL GRIEGO

Embotelladora San Luis, S.A.
Glorieta Juárez Lado Ote.
Tel: (91-48) 18-16-33
San Luis Potosí, S.L.P.
Agua mineral TOPO CHICO

Extractor y Embotelladora de
Aguas Minerales, S.A. de C.V.
Carr. Zapopan-Tesistán Km. 2.5
Tel: (91-36) 21-87-75, 22-46-59, 47-40-43
45200 Tesistán, Jal.
Agua mineral PEÑAFIEL

Productos Balseca, S.A.
Calz. Adolfo L. Mateos s/n
Km. 2.5
Tel: (91-238) 208-82, 201-82, 202-82
Apdo Postal 5
75700 Tehuacán, Pue.
Agua mineral BALSECA

Purified

Agua Purificada Las Fuentes
Poder Ejecutivo No. 21
Tel: (91-73) 14-35-39
Cuernavaca, Mor.

Agua Purificada Modelo
Juárez No. 867 Ote.
Tel: (91-671) 320-30
Culiacán, Sin.

Agua Purificada Sol
Las Hayas No. 42
Tel: (91-281) 721-69
Col. Reforma.
Xalapa, Ver.

Agua y Hielo del Distrito Federal,
S.A. de C.V.
Nautla No. 29
Tel: 564-74-75
Fax: 564-24-89
Col. Roma Sur
06760 México, D.F.

Aguas Purificadas de Mexico
Naranjo No. 346
Tel: 547-93-40, 547-93-20
Col. Sta Ma. La Ribera
06400 México, D.F.
Agua purificada AGUAPURA

Aguas Purificadas La Victoria
27 de Febrero No. 1789
Tel: (91-931) 355-66, 355-77
Col. Atasta
Villahermosa, Tab.

Aguased
Blvd. García de León No. 87
Tel: (91-451) 464-38
Morelia, Mich.
Agua purificada

Agua Vita
Vasconcelos Pte. No. 675-2
Tel: (91-83) 38-19-20
66200 San Pedro Garza García N.L.
Agua purificada y agua desmineralizada

• *Appendices* •

Celanese Mexicana, S.A.
Av. Revolución No. 1425
Tel: 548-69-60, 548-57-74
Fax: 550-22-25, 550-46-18
Telex: 17-72431 CELAME
Col. Tlacopac
01040 México, D.F.
Fabricante de resina PET, materia prima para fabricación de envases de agua purificada

Distribuidora de Agua Purificada, S.A. de C.V.
Camino a la Huasteca No. 354
Tel: (91-83) 36-32-11, 36-31-47
Sta Catarna, N.L.
Agua purificada, HUASTECA

Electropura, S.A. de C.V.
Bahia de Pérula No. 34
Tel: 545-71-63, 531-41-90, 545-07-71
Col. Anáhuac
11300 México, D.F.
Aguas purificadas e industriales

Embotelladora O'Key de Cordoba, S.A.
Km. 342 Carr. Córdoba-Veracruz
Tel: (91-271) 212-12, 221-12
Córdoba, Ver.
Agua purificada MEYALLI

Gardel, S.A.
Elias Reynoso S. No. 307
Tel: (91-83) 58-32-15, 58-53-66
Monterrey, N.L.
Agua Purificada GARDEL

Industrial ZAZ, S.A. de C.V.
Tamaulipas No. 125 Esq Naranja
Tel: (91-62) 15-61-95, 15-67-76, 15-62-49
Hermosillo, Son.
AGUALAB, AGUADEST, AGUAPURA.

Planta Electropura de Yucatán, S.A.
Cale 29 No. 149 X 36 y 38
Tel: (91-99) 27-05-89
Col. Buenavista
Mérida, Yuc.
Planta electropura

Productos Ralin de Cozumel,
S.A. de C.V.
35 Av. Sur No. 700
Tel: (91-987) 206-29
77600 Cozumel, Q.R.
Hielo y agua purificada

Purificadora de Agua La Lomita
Priv. La Lomita No. 1607
Tel: (91-14) 15-22-56
Col. Mirador
31270 Chihuahua, Chih.

Purificadora de Hermosillo,
S.A. de C.V.
Carr. a Tecoripa Km. 3
Tel: (91-62) 12-12-93, 17-43-37
Hermosillo, Son.
Agua purificada FRESC.

Purificadora Donaji
Priv. Fray A. Garay No. 110
Tel: (91-951) 565-20
Oaxaca, Oax.

San Juan
Carr. a Reynosa No. 1328
Tel: (91-83) 37-23-02
Guadalupe, N.L.
Agua purificada SAN JUAN

Agua Destilada Garvi, S.R.L.
Jerez No. 128
Tel: (91-83) 47-39-67
Col. Mitras Centro
Monterrey, N.L.
Agua purificada GARVI

Agua Electropura Bebe, S.A.
Av. Juárez No. 1303 Nte.
Tel: (91-83) 75-02-69, 75-76-20
64490 Monterrey, N.L.

Agua Purificada California
Perú No. 319 Esq. Belice
Tel: (91-491) 821-40
Fracc. Sta Elena
20230 Aguascalientes Ags.
Hielitos FALI, agua CALIFORNIA

Agua Purificada Cristal
España No. 704
Tel: (91-491) 807-30
20210 Aguascalientes, Ags.

Agua Purificada Freskagua
Calle 9, No. 308
Tel: (91-271) 218-52
Córdoba, Ver.

Agua Purificada Geiser
Elías Reynoso Santana No. 307
Tel: (91-83) 59-01-06, 59-01-11
Col. Buenos Aires
Monterrey, N.L.

Agua Purificada Kabala
Gonzales Ortega No. 3913
Tel: (91-14) 13-52-09
Col. Granjas
Chihuahua, Chih.
Agua Kabala, servicio a empresas

El Manantial
Netzahualcoyotl No. 8
Tel: (91-678) 399-99
Col. López Mateos
Mazatlán, Sin.
Agua electropura

Super Agua
Carr. a la Resurrección No. 5426
Tel: (91-22) 35-20-85, 35-23-30
Puebla, Pue.
Agua purificada y destilada

Appendix D – WHERE TO GO FOR ASSISTANCE*

**CANADIAN GOVERNMENT
DEPARTMENTS AND SERVICES
IN CANADA**

**DEPARTMENT OF FOREIGN AFFAIRS AND
INTERNATIONAL TRADE (Ottawa)**

Department of Foreign Affairs and International Trade (DFAIT) is the Canadian federal government department most directly responsible for trade development. The **InfoEx Centre** 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 provides interested companies with copies of specialized export publications.

InfoEx Centre

Tel.: 1-800-267-8376 or (613) 944-4000

Fax: (613) 996-9709

Latin America and Caribbean Trade Division promotes trade with Mexico. There are several trade commissioners at the Embassy of Canada in Mexico City 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.

**Latin America and Caribbean Trade
Division (LGT)**

Department of Foreign Affairs and
International Trade

Lester B. Pearson Building

125 Sussex Drive

Ottawa, Ontario K1A 0G2

Fax: (613) 943-8806

INTERNATIONAL TRADE CENTRES

International Trade Centres have been established across the country as a first point of contact to support the exporting efforts of Canadian firms. Co-located with the regional offices of Industry Canada, 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:

British Columbia

Scotia Tower

900-650 West Georgia Street

P.O. Box 11610

Vancouver, British Columbia

V6B 5H8

Tel: (604) 666-0434

Fax: (604) 666-0617

Yukon

Room 210

300 Main Street

Whitehorse, Yukon

Y1A 2B5

Tel: (403) 667-3921

Fax: (403) 668-5003

Alberta

Canada Place

Suite 540

9700 Jasper Avenue

Edmonton, Alberta

T5J 4C3

Tel: (403) 495-4782

Fax: (403) 495-4507

11th Floor

510-5th Street S.W.

Calgary, Alberta

T5P 3S2

Tel: (403) 292-6660

Fax: (403) 292-4578

* Source: *Canada-Mexico: Partnering for Success*
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Ottawa, Ontario.

Northwest Territories

Precambrian Building
10th Floor
P.O. Box 6100
Yellowknife, Northwest Territories
X1A 2R3
Tel: (403) 920-8578
Fax: (403) 873-6228

Saskatchewan

Suite 401
119-4th Avenue South
Saskatoon, Saskatchewan
S7K 5X2
Tel: (306) 975-4400
Fax: (306) 975-5334

4th Floor
1955 Smith Street
Regina, Saskatchewan
S4P 2N8
Tel: (306) 780-7520
Fax: (306) 780-6679

Manitoba

7th Floor
330 Portage Avenue
P.O. Box 981
Winnipeg, Manitoba
R3C 2V2
Tel: (204) 983-4090
Fax: (204) 983-2187

Ontario

Dominion Public Building
4th Floor
1 Front Street West
Toronto, Ontario
M5J 1A4
Tel: (416) 973-5000
Fax: (416) 973-8714

Quebec

Stock Exchange Tower
Suite 3800
800 Victoria Square
P.O. Box 247
Montréal, Québec
H4Z 1E8
Tel: (514) 283-7907
Fax: (514) 283-8794

New Brunswick

Assumption Place
770 Main Street
P.O. Box 1210
Moncton, New Brunswick
E1C 8P9
Tel: (506) 857-4782
Fax: (506) 851-6429

Prince Edward Island

Confederation Court Mall
Suite 400
134 Kent Street
P.O. Box 1115
Charlottetown, Prince Edward Island
C1A 7M8
Tel: (902) 566-7400
Fax: (902) 566-7450

Nova Scotia

Central Guarantee Trust Tower
5th Floor
1801 Hollis Street
P.O. Box 940, Station "M"
Halifax, Nova Scotia
B3J 2V9
Tel: (902) 426-4782
Fax: (902) 426-2624

Newfoundland

Atlantic Place
Suite 504
215 Water Street
P.O. Box 8950
St. John's, Newfoundland
A1B 3R9
Tel: (709) 772-4782
Fax: (709) 772-5093

**WORLD INFORMATION NETWORK
FOR EXPORTS**

The World Information Network for Exports (WIN Exports) is a computer-based information system designed by DFAIT to help Canada's trade development officers abroad match foreign needs to Canadian capabilities. It provides users with information on the capabilities, experience and interests of more than 30,000 Canadian exporters.

To be registered on WIN Exports, call: (613) 996-5701.

PROGRAM FOR EXPORT MARKET DEVELOPMENT (PEMD)

This program seeks to increase export sales by sharing the costs of industry-initiated activities aimed at developing export markets. PEMD is administered by Industry Canada regional offices and funded by DFAIT. Activities eligible for PEMD financial support (up to 50 percent of the costs) include:

- Participation in recognized foreign trade fairs outside of Canada;
- Trips to identify export markets and visits by foreign buyers to Canada;
- Project bidding or proposal preparation at the precontractual stage for projects outside Canada;
- Establishment of permanent sales offices abroad in order to undertake sustained marketing efforts; and
- Special activities for non-profit, non-sales food, agriculture and fish organizations, marketing boards and agencies, trade fairs, technical trials and product demonstrations (for example).

Support is also provided for certain types of government-planned activities, such as outgoing trade missions of Canadian business representatives and incoming missions to Canada of foreign business and government officials who can influence export sales.

For information, call: (613) 954-2858.

INTERNATIONAL FINANCING

DFAIT helps Canadian exporters interested in pursuing multilateral business opportunities financed by international financing institutions (IFI). Canadian exporters and trade associations can access market data, obtain a better understanding of the competition, and determine if an IFI-funded market opportunity is practical and worth pursuing. DFAIT can provide information and advice on the availability of Canadian government-funded assistance programs and can assist companies in developing effective export marketing.

For further information, contact:

International Finance Division
Department of Foreign Affairs and
International Trade
Tel: (613) 995-7251
Fax: (613) 943-1100

TECHNOLOGY INFLOW PROGRAM

Managed by DFAIT and delivered domestically by the National Research Council, this program is designed to help Canadian companies locate, acquire and adopt foreign technologies by promoting international collaboration. Industry Canada also helps in program promotion. The program officers respond to requests to identify technology sources and opportunities for co-operation between Canadian and foreign firms. The program will also help Canadian firms make exploratory visits abroad to identify and gain first-hand knowledge of relevant foreign technologies as well as to negotiate to acquire them.

INVESTMENT DEVELOPMENT PROGRAM

This program helps Canadian companies find the investment they need. It actively promotes investments that take the form of new plants and equipment, joint ventures or strategic partnerships. It is especially interested in attracting investment that introduces new technology into Canada, a key to creating new jobs and economic opportunities. Investment officers make contact with foreign investors and bring them together with Canadian companies.

For information, call: (613) 996-8625.

INDUSTRY CANADA

Industry Canada was created with a broad mandate to improve the competitiveness of Canadian industry. In the area of small business, it has been given specific responsibility to:

- Develop, implement and promote national policies to foster the international competitiveness of industry, the enhancement of industrial, scientific and technological development, and the improvement in the productivity and efficiency of industry;

- Promote the mobility of goods, services and factors of production within Canada;
- Develop and implement national policies to foster entrepreneurship and the start-up, growth and expansion of small businesses;
- Develop and implement national policies and programs respecting industrial benefits from procurement of goods and services by the government of Canada;
- Promote and provide support services for the marketing of Canadian goods, services and technology; and
- Promote investment in Canadian industry, science and technology.

INDUSTRY CANADA REGIONAL OFFICES

The regional offices work directly with Canadian companies to promote industrial, scientific and technological development. They help clients recognize opportunities in a competitive international marketplace by providing services in the areas of business intelligence and information, technology and industrial development, and trade and market development. They also promote and manage a portfolio of programs and services.

The following are areas in which Industry Canada regional offices have special competence:

- Access to trade and technology intelligence and expertise;
- Entry points to national and international networks;
- Industry sector knowledge base;
- Co-location with International Trade Centres connected to DFAIT and Canadian posts abroad;
- Client focus on emerging and threshold firms; and
- Industry Canada Business Intelligence.

THE BUSINESS OPPORTUNITIES SOURCING SYSTEM (BOSS)

BOSS is a computerized databank that profiles over 26,000 Canadian companies. It lists basic information on products, services and operations that are useful to potential customers. The system was established in 1980 by Industry Canada in co-operation with participating provincial governments. BOSS was originally established so that trade commissioners posted around the world by DFAIT could find Canadian companies that might be able to take advantage of foreign market opportunities. Today, more than 11,000 domestic and international subscribers use the system not only to locate Canadian suppliers but also to obtain market intelligence and identify market opportunities. The majority of subscribers are Canadian companies.

For information, call: (613) 954-5031.

MARKET INTELLIGENCE SERVICE

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

For information, call: (613) 954-4970.

CANADIAN INTERNATIONAL DEVELOPMENT AGENCY

An important possible source of financing for Canadian ventures in Mexico is the special fund available through the Canadian International Development Agency (CIDA) under the Industrial Co-operation Program or CIDA/INC. CIDA's Industrial Co-operation 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, 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. There are five INC mechanisms that help eligible Canadian firms to conduct studies and provide professional guidance and advice to potential clients. Where a project involves environmental improvement, technology transfer, developmental assistance to women, job training or job creation, early contact with CIDA's Industrial Co-operation Division is suggested.

An important CIDA criterion is that the project creates jobs in Mexico without threatening jobs in Canada. In fact, most CIDA-assisted projects have produced net increases in Canadian jobs.

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

ATLANTIC CANADA OPPORTUNITIES AGENCY

Atlantic Canada companies seeking to develop exports to Mexico may be eligible for assistance from the Atlantic Canada Opportunities Agency (ACOA). The agency works in partnership with entrepreneurs from the Atlantic region to promote self-sustaining economic activity in Atlantic Canada.

The ACOA Action Program provides support to businesses as they look to expand existing markets

through the development of marketing plans. Efforts include monitoring trade opportunities arising from global economic change, communications efforts to promote the region, trade missions and associated activities, as well as better co-ordination with federal and provincial bodies that influence trade and investment opportunities.

ACOA Head Office

Blue Cross Centre
644 Main Street
P.O. Box 6051
Moncton, New Brunswick
E1C 9J8
Toll free: 1-800-561-7862
Fax: (506) 851-7403

Newfoundland and Labrador

Suite 801, Atlantic Place
215 Water Street
P.O. Box 1060, Station C
St. John's, Newfoundland
A1C 5M5
Tel: (709) 772-2751
Toll free: 1-800-563-5766
Fax: (709) 772-2712

Nova Scotia

Suite 600
1801 Hollis Street
P.O. Box 2284, Station M
Halifax, Nova Scotia
B3J 3M5
Tel: (902) 426-8361
Toll free: 1-800-565-1228
Fax: (902) 426-2054

Prince Edward Island

75 Fitzroy Street
3rd Floor
Charlottetown, Prince Edward Island
C1A 1R6
Tel: (902) 566-7492
Toll free: 1-800-565-0228
Fax: (902) 566-7098

New Brunswick

570 Queen Street
P.O. Box 578
Fredericton, New Brunswick
E3B 5A6
Tel: (506) 452-3184
Toll free: 1-800-561-4030
Fax: (506) 452-3285

**WESTERN ECONOMIC
DIVERSIFICATION CANADA**

Western Canadian companies interested in Mexico may be able to secure assistance from Western Economic Diversification Canada (WD). This agency provides financial assistance for projects that contribute to the diversification of the western economy. It acts as a pathfinder to ensure that western businesses are aware of and receive assistance from the most appropriate source of funding, federal or other, for their projects. It acts as an advocate for the west in national economic decision making and it co-ordinates federal activities that have an impact on economic growth in the west. It also plays a role in promoting trade between western Canada and markets around the world. Inquiries about Western Economic Diversification Canada and other activities of the department can be directed to any of the following regional offices:

Manitoba

P.O. Box 777
Suite 712
The Cargill Building
240 Graham Avenue
Winnipeg, Manitoba
R3C 2L4
Tel: (204) 983-4472
Fax: (204) 983-4694

Saskatchewan

P.O. Box 2025
Suite 601
S.J. Cohen Building
119-4th Avenue South
Saskatoon, Saskatchewan
S7K 5X2
Tel: (306) 975-4373
Fax: (306) 975-5484

For Regina residents (toll free):
Tel: (306) 780-6725

Alberta

Suite 1500
Canada Place
9700 Jasper Avenue
Edmonton, Alberta
T5J 4H7
Tel: (403) 495-4164
Fax: (403) 495-7725

For Calgary residents (toll free):
Tel: (403) 292-5382

British Columbia

P.O. Box 49276
Bentall Tower 4
1200-1055 Dunsmuir Street
Vancouver, British Columbia
V7X 1L3
Tel: (604) 666-6256
Fax: (604) 666-2353

For B.C. residents (toll free):
Tel: 1-800-663-2008

EXPORT DEVELOPMENT CORPORATION

Companies exporting to Mexico will need suitable financing and insurance for the transaction. The Export Development Corporation (EDC) may be able to help with both. EDC is a Canadian Crown corporation whose purpose is to facilitate and develop Canada's export trade. The corporation provides insurance, guarantees and export financing that, combined with advice and the organization of financial services packages, facilitate the sale of Canadian goods and services abroad. EDC offers the following services:

Export Insurance and Related Guarantees

- global comprehensive insurance
- global political insurance
- selective political insurance
- specific transaction insurance
- specific transaction guarantees
- loan pre-disbursement insurance
- foreign investment insurance
- performance security insurance
- performance security guarantees
- consortium insurance
- surety bond insurance
- bid security guarantees
- specific sub-supplier insurance
- equipment (political risk) insurance
- bid-bond insurance
- medium-term agricultural guarantees

Export Financing and Related Guarantees

- loans
- line of credit allocations
- note of purchases
- protocols
- loan guarantees
- specialized credit

EDC's head office is located in Ottawa. Regional offices are maintained in Halifax, Montreal, Toronto, London, Winnipeg, Calgary and Vancouver. General inquiries regarding EDC services can be channelled through the regional offices maintained by the Corporation in several major cities. Export services, however, are handled only by the Ottawa office. Inquiries about export financing for Mexico should be addressed to the Export Financing Group for Mexico and South America in Ottawa.

Ottawa (Head Office)

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

Public Information

Tel: (613) 598-2739

Vancouver

Suite 1030
One Bentall Centre
505 Burrard Street
Vancouver, British Columbia
V7X 1M5
Tel: (604) 666-6234
Fax: (604) 666-7550

Calgary

Suite 1030
510-5th Street S.W.
Calgary, Alberta
T2P 3S2
Tel: (403) 292-6898
Fax: (403) 292-6902

Winnipeg

8th Floor
330 Portage Avenue
Winnipeg, Manitoba
R3C 0C4
Tel: (204) 983-5114
Fax: (204) 983-2187
(Serving Manitoba and Saskatchewan)

Toronto

Suite 810
National Bank Building
150 York Street
P.O. Box 810
Toronto, Ontario
M5H 3S5
Tel: (416) 973-6211
Fax: (416) 862-1267

London

Suite 1512
Talbot Centre
148 Fullarton Street
London, Ontario
N6A 5P3
Tel: (519) 645-5828
Fax: (519) 645-5580

Montreal

Suite 4520
800 Victoria Square
P.O. Box 124
Tour de la Bourse
Montréal, Québec
H4Z 1C3
Tel: (514) 283-3013
Fax: (514) 878-9891

Halifax

Purdy's Wharf, Tower 2
Suite 1410
1969 Upper Water Street
Halifax, Nova Scotia
B3J 3R7
Tel: (902) 429-0426
Fax: (902) 423-0881

NATIONAL RESEARCH COUNCIL

Canadian companies hoping to succeed in the Mexican marketplace may require additional technology to improve their competitiveness. The National Research Council (NRC) works with Canadian firms of all sizes to develop and apply technology for economic benefit. The Council supervises the Industrial Research Assistance Program (IRAP), a national network for the diffusion and transfer of technology.

The IRAP network supports the process of developing, accessing, acquiring, implanting and using technology throughout Canadian industry. IRAP has been in existence for 40 years and has acquired a reputation as one of the more flexible and effective federal programs. IRAP takes advantage of an extensive network that includes more than 120 regional and local offices, 20 provincial technology centres, the Council's own laboratories and research institutes, federal government departments and technology transfer officers in Canadian universities. The IRAP network also extends abroad through the technology counsellors attached to Canadian posts in some 18 foreign countries.

For more information or the name of the IRAP officer nearest you, contact:

IRAP Office

National Research Council

Montreal Road
Building M-55
Ottawa, Ontario
K1A 0R6
Tel: (613) 993-5326
Fax: (613) 952-1086

KEY CONTACTS IN CANADA

BUSINESS ASSOCIATIONS

The Canadian Council for the Americas (CCA) is a non-profit organization formed in 1987 to promote business interests in Latin America and Caribbean countries. The CCA promotes events and programs targeted at expanding business and building networking contacts between Canada and the countries of the region. It also publishes a bimonthly newsletter.

The Canadian Council for the Americas (CCA)

Executive Offices, Third Floor
145 Richmond Street West
Toronto, Ontario
M5H 2L2
Tel: (416) 367-4313
Fax: (416) 367-5460

Canadian Exporters' Association (CEA)

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

Canadian Manufacturers' Association (CMA)

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

The Canadian Chamber of Commerce (CCC)

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

MEXICAN GOVERNMENT OFFICES

The Embassy of Mexico, Mexican trade commissioners in Canada and Mexican consulates can provide assistance and guidance to Canadian companies in need of information about doing business in Mexico.

Embassy of Mexico

130 Albert Street, Suite 1800
Ottawa, Ontario
K1P 5G4
Tel: (613) 233-8988
Fax: (613) 235-9123

Mexican Consulate in Ottawa

Tel: (613) 235-7782

SECOFI

130 Albert Street, Suite 1700
Ottawa, Ontario
K1P 5G4
Tel: (613) 235-7782
Fax: (613) 235-1129

**OTHER MEXICAN CONSULATES
GENERAL IN CANADA**

Consulate General of Mexico

2000, rue Mansfield
Suite 1015
Montréal, Québec
H3A 2Z7
Tel: (514) 288-2502/4916
Fax: (514) 288-8287

Consulate General of Mexico

60 Bloor Street West
Suite 203
Toronto, Ontario
M4W 3B8
Tel: (416) 922-2718/3196
Fax: (416) 922-8867

Consulate General of Mexico

810-1139 West Pender Street
Vancouver, British Columbia
V6E 4A4
Tel: (604) 684-3547/1859
Fax: (604) 684-2485

Mexican Honorary Consulate

380, Chemin St. Louis
No. 1407
Québec, Québec
G1S 4M1
Tel: (418) 681-3192

Mexican Honorary Consulate

830-540 5th Avenue, S.W.
Calgary, Alberta
T2P 0M2
Tel: (403) 263-7077/7078
Fax: (403) 263-7075

For the Mexican Trade Commission offices in Montreal, Toronto and Vancouver see the listing for Bancomext.

MEXICAN BANKS WITH OFFICES IN CANADA

Bancomext offers credits, export guarantees and counselling services for those seeking to do business in Mexico. Credits are available for export, import and project financing. Counselling covers fiscal, financial, marketing and legal aspects of commercial transactions. Bancomext also sponsors trade fairs, international exhibitions and trade missions.

Bancomext

Trade Commission of Mexico

P.O. Box 32, Suite 2712
TD Bank Tower
66 Wellington Street
Toronto, Ontario
M5K 1A1
Tel: (416) 867-9292
Fax: (416) 867-1847

Bancomext

Trade Commission of Mexico

200 Granville Street
Suite 1365
Vancouver, British Columbia
V6C 1S4
Tel: (604) 682-3648
Fax: (604) 682-1355

Bancomext

Trade Commission of Mexico

1501 McGill College
Suite 1540
Montréal, Québec
H3A 3M8
Tel: (514) 287-1669
Fax: (514) 287-1844

Banamex and Banca Serfin are private-sector banks that offer specialized services through their international trade information centres. The centres participate in a computerized communications network with access to numerous economic, governmental and financial databases throughout the world. These banks have branches throughout Mexico, and maintain offices in Toronto.

Banamex (Banco Nacional de México)

Suite 3430
1 First Canadian Place
P.O. Box 299
Toronto, Ontario
M5X 1C9
Tel: (416) 368-1399
Fax: (416) 367-2543

Banca Serfin

161 Bay Street
BCE Place
Canada Trust Tower
Suite 4360
P.O. Box 606
Toronto, Ontario
M5J 2S1
Tel: (416) 360-8900
Fax: (416) 360-1760

**CANADIAN GOVERNMENT
DEPARTMENTS AND SERVICES
IN MEXICO**

**COMMERCIAL DIVISION
THE EMBASSY OF CANADA IN MEXICO**

The Commercial Division of the Canadian Embassy in Mexico can provide vital assistance to Canadians venturing into the Mexican market. The trade commissioners are well informed about the market and will respond in whatever measure possible to support a Canadian firm's presence in Mexico.

Note: To telephone México, D.F., dial: 011-52-5 before the number shown below; for contacts in other cities in Mexico, consult the international code listing in your local telephone directory for the appropriate regional codes.

**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 Consulate

Edificio Kalos, Piso C-1
Local 108A
Zaragoza y Constitucion
64000 Monterrey
México
Tel: 443-200
Fax: 443-048

KEY CONTACTS IN MEXICO

MEXICAN GOVERNMENT

**Secretariat of Budget & Programming
*Secretaría de Programacion y Presupuesto***

Palacio Nacional Patio de Honor, Piso 4
Col. Centro
06740 México, D.F.
México
Tel: 542-8762/8763
Fax: 542-1209
Information Department: 286-1000/1900

**Secretariat for Commerce and
Industrial Promotion
*Secretaría de Comercio y Fomento
Industrial***

**Dirección General de Servicios al
Comercio Exterior**

Alfonso Reyes No. 30, Piso 10
Col. Hipódromo de la Condesa
06170 México, D.F.
México
Tel: 286-1757
Fax: 286-1543

**Secretariat of Finance and Public Credit
Secretaría de Hacienda y Crédito Público
Dirección General Técnica de Ingresos**

Palacio Nacional
1er. Patio Mariano
Col. Centro
06066 México, D.F.
México
Tel: 518-5420 through 29
Fax: 542-2821

CHAMBERS AND ASSOCIATIONS

Mexico has a number of Chambers of Commerce and professional associations that can provide assistance and guidance to Canadian companies in Mexico. Their standards of service vary widely and you should consult with Canadian Embassy officials to determine which organization would best suit your needs. In some cases, the information on companies not located in Mexico City was not confirmed.

National Chamber of Manufacturing Industries

Cámara Nacional de la Industria de la Transformación (CANACINTRA)
Vistente Gutierrez Camposeco
San Antonio 256-8
Col. Ampliación Napoles
03849 México, D.F.
Phone: (525) 563-3400 / 663-0511
Fax: (525) 598-9467

American Chamber of Commerce of Mexico

Cámara Americana de Comercio de México, A.C.
Mr. John Burton
Lucerna 78
06600 México, D.F.
Phone: (525) 709-0995

National Chamber of Commerce, Services and Tourism of Mexico City

Cámara Nacional de Comercio, Servicios y Turismo de la Ciudad de México (CANACO)
Sr. Sergio Aldana Contreras
Reforma 42
Col. Centro
06048 México, D.F.
Phone: (525) 592-2677 / 592-2665
Fax: (525) 7412

Canadian Chamber of Commerce in Mexico

Cámara de Comercio del Canadá en México
Srta Alicia Harrsch
Horacio 1855, Piso 3
Col. Polanco
11510 México, D.F.
Phone: (525) 203-8211 (expected to change soon)
Fax: (525) 203-8542

National Association of Importers and Exporters of the Mexican Republic

Asociación Nacional de Importadores y Exportadores de la República Mexicana (ANIERM)
Ing. Rodrigo Guerra Botello
Monterrey 130
Col. Roma
06700 México, D.F.
Phone: (525) 564-8618
Fax: (525) 584-5317

National Association of Maritime Agents

Asociación Nacional de Agentes Marítimos
Homero No. 1425, Piso 3
Col. Chapultepec Morales
11510 México, D.F.
México
Phone: 395-8931
Fax: 520-7165

Mexican Business Council for International Affairs

Consejo Empresarial Mexicano para Asuntos Internacionales (CEMAI)
Homero No. 527, Piso 7
Col. Polanco Chapultepec
11560 México, D.F.
México
Phone: 250-7033/7539
Fax: 531-1590

Management Co-ordination Council

Consejo Coordinator Empressarial
Homero 527, Piso 5
Chapultepec Morales
11570 México, D.F.
México
Phone: 250-6977/7750
Fax: 250-6995

Mexican Confederation of Employers

Confederación Patronal de la República Mexicana
Insurgentes Sur No. 950, Piso 1 y 2
Col. del Valle
03100 México, D.F.
México
Phone: 687-6465/6467
Fax: 536-2160

**National Institute for Statistics,
Geography and Information**

Instituto Nacional de Estadística, Geografía e
Informática (INEGI)

Av. Heroe de Nacozari No. 2301

Fracc. Jardines del Parque

20290 Aguascalientes, Ags.

México

Phone: (49)-18.00.34

**National Confederation of Commercial, Services
and Tourism Chambers**

Confederación de Cámaras Nacionales de
Comercio, Servicios y Turismo
(CONCANACO-SERVYTUR)

Balderas 144, Piso 4

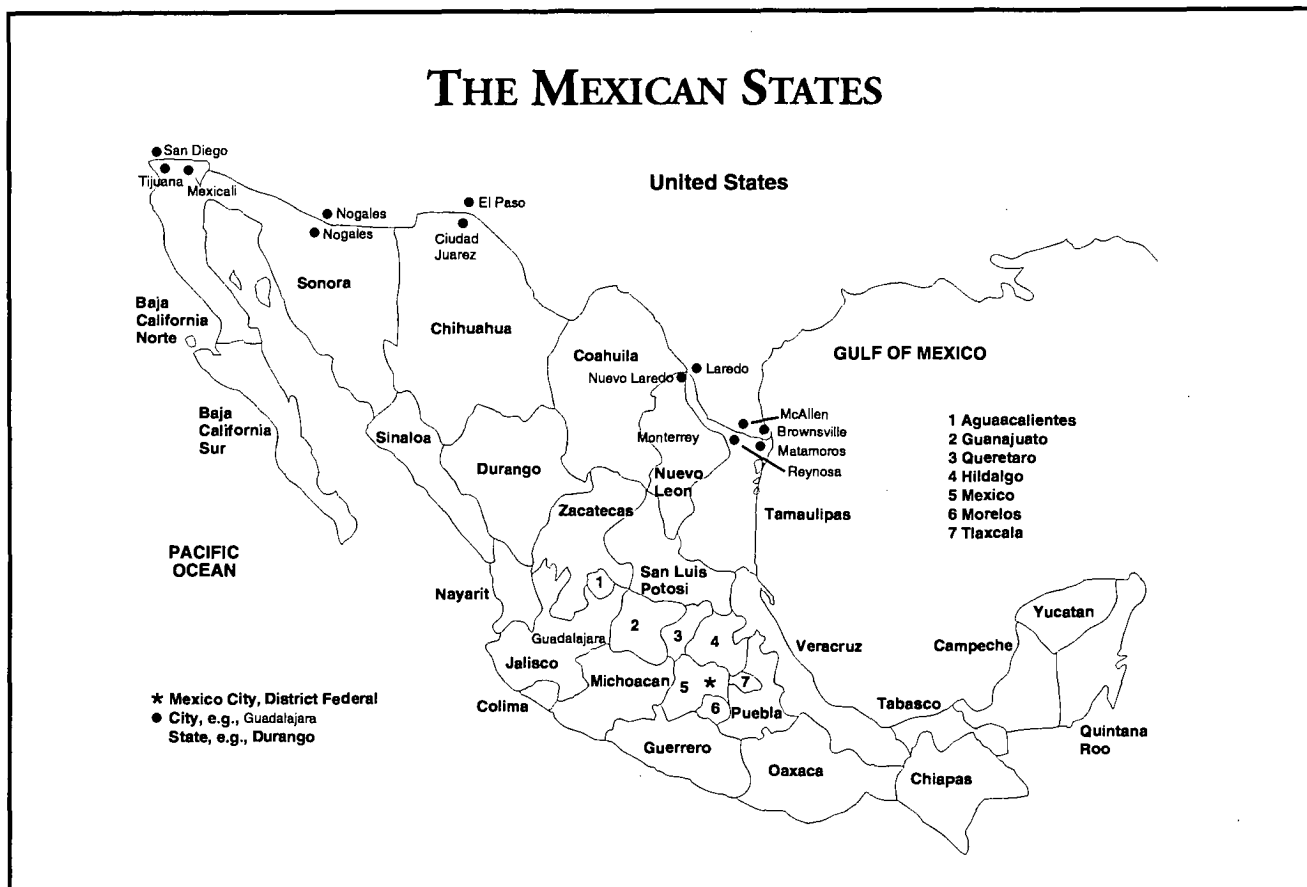
Col. Centro

México D.F. 06079

México

Phone: 709-15-59 / 709-11-19

Fax: 709-11-52



Appendix E – MEXICO IN BRIEF

Mexico is a country that is both a near neighbour and an unknown quantity. Perceptions of the largest Spanish-speaking country in the world are surprisingly dated, generally formed by the literature and films of the 1940s, and it is hardly surprising that they do not have even the dubious accuracy they had then.

Mexico's economy was long closed and protectionist, which did not spur the sort of exploration that opened people's eyes. "Poor Mexico — so far from God, so close to the United States," the words of Porfirio Diaz, was for many years a mantra for preventing what Mexicans saw as further encroachment on their sovereignty by their nearest neighbour.

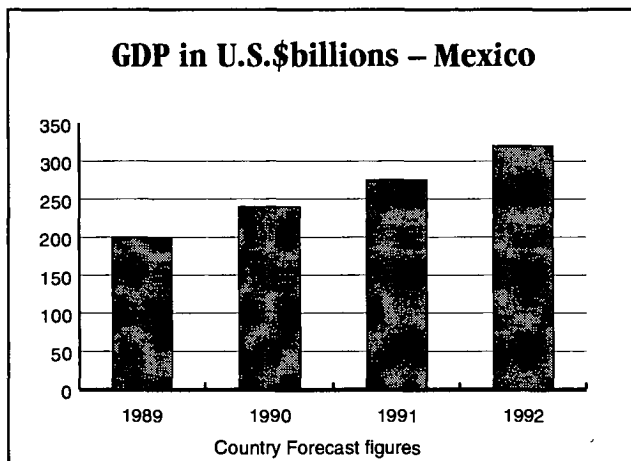
Changes in Mexico's economy were dramatically forced by the oil price collapse in the early 1980s, which followed a brief boom that

saw Mexico begin to achieve some real growth for the first time in decades. The recession of the period hit Mexico too, and the government of Carlos Salinas de Gortari, elected in 1986, was spurred into activity in order to recapture some of the prosperity that had seemed so close only a few years before.

The Salinas government negotiated Mexico's accession to the GATT, which meant accepting GATT disciplines. From there, Mexico introduced a sweeping series of economic reforms. The government renegotiated the foreign debt, created a National Development Plan to revitalize the nation's infrastructure, and secured broad popular support from business, labour and the general population for voluntary measures to restrain wages and prices in order to reduce inflation and stabilize the economy. Other key elements in reform have included privatization of state-controlled enterprises, deregulation, massive investment in infrastructure, and the encouragement of

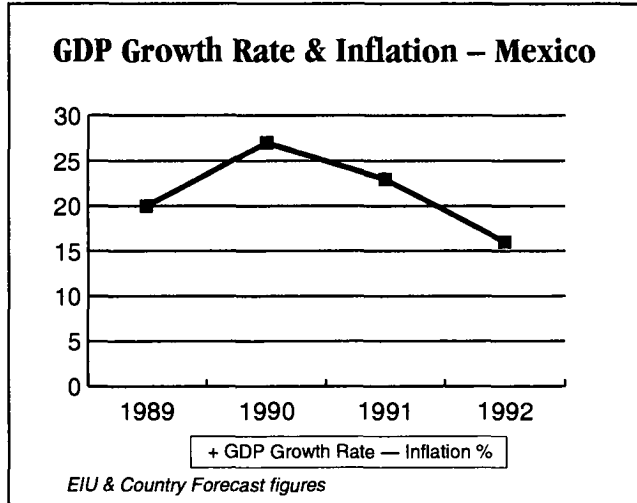
foreign participation in building a modern and efficient industrial capacity.

Mexico's debt reduction has been one of its signal achievements. In 1986, it was costing over 46 percent of GDP to service the debt; by 1994, it will be down to about 30 percent. Growth continues to be strong since reforms were begun, with about 4 percent predicted for 1993 and stable patterns averaging around 2 percent predicted for the next few years. Most major forecasters see Mexico as sustaining a strong growth throughout the coming decade. About 85 percent of government-owned enterprises have been or are being divested. The



process has brought the government about \$20 billion in revenue, as well as removing its responsibility for running some unprofitable enterprises. Tariffs have been reduced on a wide range of products, with most now below 20 percent; the majority of Canadian goods enter Mexico at a tariff level of 13.5 percent.

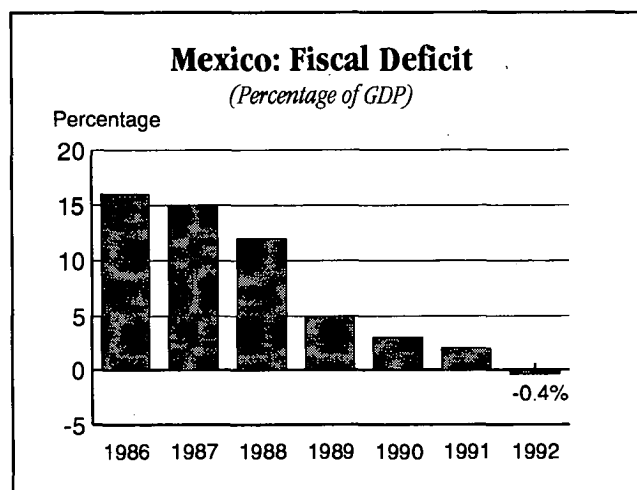
There have been some costs to Mexico in its fast turnaround: poverty is still very widespread and environmental standards are not yet as good in practice as they are on paper. But the Solidarity program initiated by President Salinas and his ruling party has made some inroads in the quality of life of particularly rural Mexicans. Inflation has dropped substantially, the peso is fairly stable, public finances are improving. Consequently, foreign business representing a broad spectrum of industrial and



commercial activity is investing in Mexico and developing new markets. Canadian firms there to explore the potential in recent years have been returning with reports of a vibrant economy and a welcoming attitude from their Mexican counterparts. Mexico has begun on a path toward progress from which it is not planning to turn back.

Gross domestic product grew by 2.6 percent to reach U.S.\$320 billion in 1992, following a 3.6 percent increase in 1991. As a result, Mexico is now one of the 20 largest economies in the world. Commerce and the hospitality industries comprise the largest sector by percentage, with manufacturing a close second.

The Mexican government's Pact for Stability and Economic Growth (*El Pacto*) has persuaded labour and business to accept general

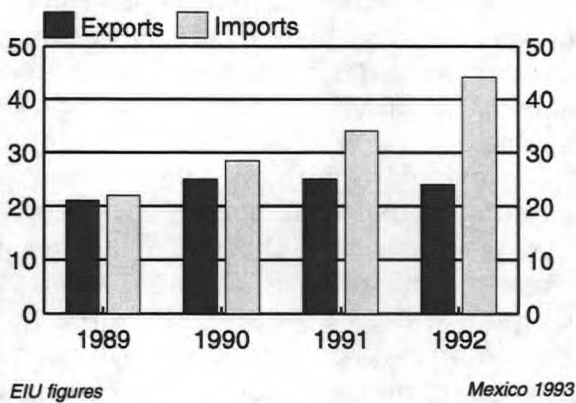


North America: 1992 Population/ Median Age Comparison



guidelines for increases in wages and prices, and negotiates exemptions with a Follow-Up and Evaluation Commission. In large part as a result of this approach, Mexico's inflation rate has dropped from 159 percent in 1987 to a projected estimate of 7.0 percent to 9.5 percent in 1993. Economic growth rates for 1993 are projected at 2.5 percent to 3.0 percent, after a growth rate of 2.6 percent in 1992.

Total Foreign Trade in U.S.\$billions

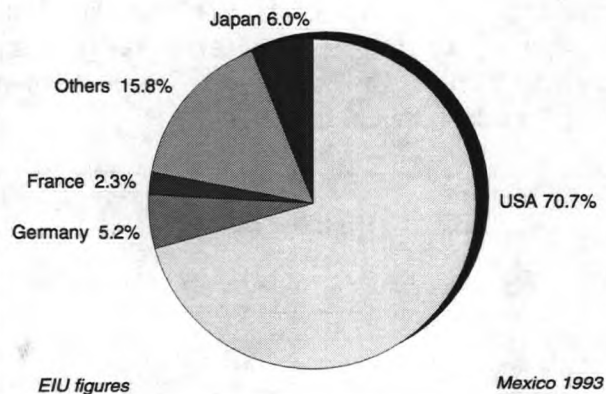


By broadening the tax base, the government of Mexico has been able to reduce tax rates while increasing total income. Spending cuts and fiscal reform have also been put in place by government and the result has been that the public sector actually ran a surplus in 1992.

Compared to Canada and the United States, Mexico is a very young country. Last year, it was estimated that 57 percent of its population was under 29; by the year 2000, when the total Mexican population will exceed 100 million, it is anticipated that 41 percent will be under the age of 20.

Total exports from Mexico reached about U.S.\$27.5 billion in 1992, a 1.5 percent increase over 1991. Total imports in the same period were about U.S.\$48 billion, a 26 percent increase over the previous year. The trade deficit accordingly rose from U.S.\$11.182 billion in 1991 to U.S. \$20.6 billion in 1992.

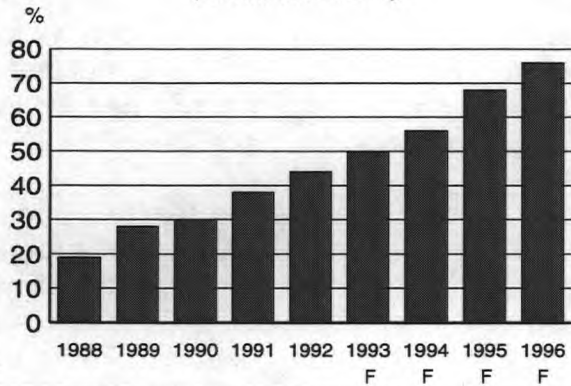
Major Markets – Origin of Imports



The United States was far and away the largest receptor of Mexican exports, at 74.5 percent estimated for 1993. Japan and Spain share the next places, well behind. Exports to Canada are reckoned differently by Mexican and Canadian methods of calculation, with about a 10 percent differential in their statistical estimates, Mexico's being the lower.

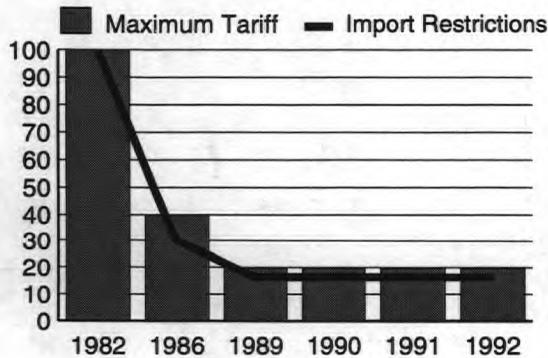
The United States is Mexico's principal supplier of imported goods, with just over 70 percent of 1993 sales. Japan and Germany are closest, though far behind. Again there is a discrepancy in Mexican and Canadian calculations of Canada's import share in Mexico, with the Mexican figures one and one-half times higher than Canada's estimation.

Mexico: Imports
(Current and Forecast)



With its economy projected to enjoy stable growth over the coming years, with its liberalized market conditions, with a young and growing population, Mexico will steadily increase its volume of imports over the foreseeable future. From \$19 billion to about \$50 billion in five years has been a remarkable leap, making it one of the fastest-growing economies in the world in this period.

Mexico: Tariff Barriers



Tariff barriers in Mexico have been decreasing since 1982, with a distinct drop since

Mexico's accession to the GATT in 1986. The average is now below 20 percent for most products and services. At the same time, many import restrictions have been removed. The average tariff applied to 80 percent of Canadian goods entering Mexico is now 13.1 percent.

Canada and Mexico have only just begun to develop their trading partnership to its full potential. In 1992, Mexico ranked fifth as a

Canadian Exports to Mexico
(Comparison 1986-1992)



source of imports to Canada, and fourteenth as a destination for Canadian exports. Less than 2 percent of Canada's 1992 imports came from Mexico and less than 1 percent of Canada's exports went there. Two-way trade totalled about \$3.5 billion, and trends suggest it could double in the next five years. The liberalized trade climate is already taking effect, with exports virtually doubled in six years. The trucking image was chosen to illustrate how close the market is to Canada. After 1997, Canada will be able to truck directly into Mexico and will be able to remove goods for drop-off in the United States, or pick up U.S. products for delivery in Mexico.

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