

# Forest Industries

## THE OPPORTUNITY

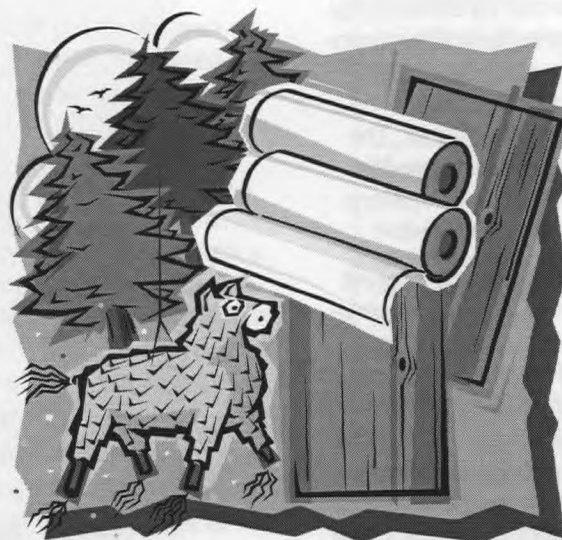
The Mexican forest sector provides important opportunities for Canadian suppliers.

- Production capacity is well-short of demand for both wood and paper products.
- Mexican producers lack the capital and the expertise to meet international productivity and quality standards.
- Only 17 percent of the fibre used in papermaking is virgin fibre from the Mexican forest sector.
- Although the devaluation of the peso has given the industry a temporary boost, it lacks the long-term capability to compete against more efficient foreign producers.

Opportunities exist in both the paper and wood subsectors. Wood products are the subject of a separate market summary and are discussed only briefly in this publication.

## MEXICO'S FOREST RESOURCES

Mexico's forest resource is the tenth largest in the world. From its earliest beginnings, the nation has grappled with the problem of effectively managing this natural heritage. Soon after independence, the Mexican government moved to protect forest resources against over-exploitation through a cutting permit system. Attempts to rationalize the management of forest resources on a national scale began in 1926, when the first



forestry law was passed. This law has been amended or replaced several times since then, most recently in 1993. In early 1995, the administration of President Zedillo began yet another reorganization of the sector when it created the *Secretaría del Medio Ambiente, Recursos Naturales y Pesca (SEMARNAP)*, Secretariat of the Environment, Natural Resources and Fisheries. The new secretariat has a mission to create the conditions for sustainable forestry development.

Mexico's national territory totals 196.7 million hectares, of which 56.8 million hectares consist of forests and jungles. According to estimates by the *Cámara Nacional de la Industria Forestal (CNIF)*, National Chamber of the Forest Industry, in 1993 almost 50 million hectares were regarded as forest resources. Less than half of these are presently regarded as commercially available. The total standing inventory of commercial forests was estimated at 2 billion cubic metres in 1993. About 80 percent of the timber harvested in Mexico is pine, 8 percent is oak and the rest consists mostly of tropical hardwoods.

## SUMMARY REPORT

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January 1996

Cat. No. E73-9/49-1995-1E  
ISBN0-662-23817-6

Disponible en français.

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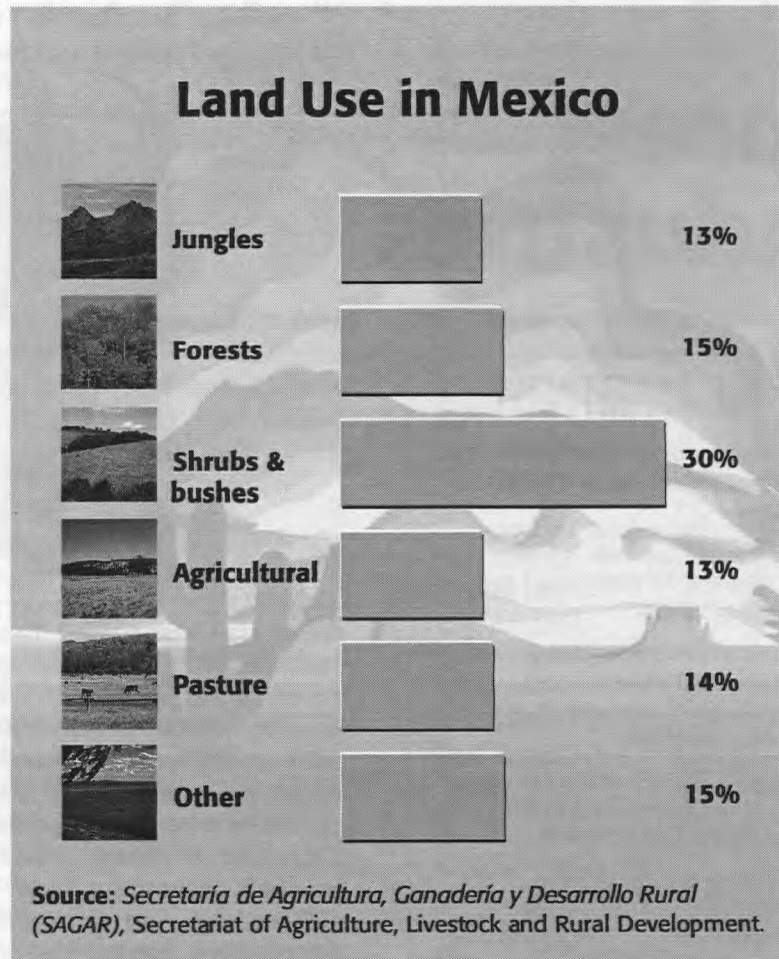
Temperate forests are the main source of trees for the forest industry. They are located mostly in the mountains, in the states of Chihuahua, Durango, Jalisco, Michoacán, Guerrero, Oaxaca and Chiapas. The tropical forests are concentrated in the south and southeast. They have not been extensively exploited.

About 80 percent of Mexico's forest resources are part of *ejidos*, community properties, which have been officially assigned by the *Secretaría de Agricultura, Ganadería y Desarrollo Rural (SAGAR)*, Secretariat of Agriculture, Livestock and Rural Development. There were about 7,000 *ejidos* in 1993. Another 15 percent of forest resources are distributed among about 100,000 small, private owners. The remaining 5 percent comprise the 123 national parks.

Deforestation is an ongoing problem. An average of 270,000 hectares of forest were lost annually between 1989 and 1993. Most of the loss was concentrated in the tropical rainforests. Severe environmental damage, including water pollution, floods and reduced biodiversity has been attributed to deforestation.

The expansion of agricultural and cattle ranching activities around forest borders is a major cause of deforestation. Illegal cutting and fires are also contributing causes. In recent years, reforestation efforts have been able to replace only about half of the losses.

Amendments to the Mexican Constitution in 1992 changed the system of land tenure to allow longer-term property rights. As a result of the new legislation, private properties are likely to gradually replace the *ejidos*. A new *Ley Forestal*, Forestry Law, enacted in 1993, will regulate this new system and is expected to encourage long-term investment in forestry. The government has recognized that a 20-year tenure is a minimum for the



development of commercial plantations. Nonetheless, reform will come slowly. As one observer put it: "It is hard to sell starving *ejidatarios*, forestry workers, on the benefits of a 20-year investment".

## THE WOOD SUBSECTOR

Although Mexico's formal forest industry is some 70 years old, it is still in its infancy in terms of technology, infrastructure and forest

### Mexico's Forest Resources, 1993

millions of hectares

Forest Type	Total Resources	Commercial Availability
<b>Temperate and cold-climate species</b>	<b>25.4</b>	<b>15.0</b>
Softwood	17.3	
Hardwood	8.1	
<b>Tropical and subtropical</b>	<b>24.2</b>	<b>6.0</b>
Mid- and low-forests	19.7	
High-forests	4.5	
<b>Total</b>	<b>49.6</b>	<b>21.0</b>

**Source:** *Cámara Nacional de la Industria Forestal (CNIF)*, National Chamber of the Forest Industry.

management practices. The industry is characterized by small-scale producers using outdated technology. As a result, forest yields are relatively low. Output is only about 1.0 cubic metre round per hectare annually. This compares with 3.5 cubic metre rounds per hectare in the U.S. and 2.3 cubic metre rounds per hectare in Canada. According to the *Secretaría del Medio Ambiente, Recursos Naturales y Pesca (SEMARNAP)*, Secretariat of the Environment, Natural Resources and Fisheries, the Mexican forest products sector is about 40 percent less productive than the world average.

The wood subsector has declined in recent years both in absolute terms and relative to the economy. Wood products production fell by one-third between 1987 and 1993, and by 10 percent in 1993 alone. The industry's share of gross domestic product (GDP) fell from 1.3 percent in 1987 to 0.9 percent in 1993. Production for 1994 was slightly higher than in the previous year.

Until recently, all of Mexico's timber production came from wild forests, as opposed to commercial plantations. In 1994, 76 percent of output was sold as square timber and about 16 percent went to the pulp and paper industry. More than three-quarters of timber production comes from five states. Durango is the largest forestry state, accounting for 30 percent of production.

The devaluation of the peso, in December 1994, has given the industry a temporary boost. But Mexican producers will have difficulty competing with imported wood products in the long run. Total wood production in 1994 was only 6.4 million cubic metres, a 35 percent drop from 1987. Moreover, 1994 production was only about 43 percent of domestic consumption which is estimated at 15 million cubic metres.

### Wood Pulp

In Mexico, wood pulp is known as *celulosa*. The industry has been severely affected by trade liberalization. Domestic production fell from 551,000 tonnes in 1988 to 276,300 tonnes in 1994. The drop was almost 20 percent in 1994 alone. The industry suffered from a world oversupply of pulp between 1991 and 1993, and four of Mexico's nine pulp plants were shut down. The recovery of prices in 1994 and the devalued peso have since allowed two of them to reopen.

As a result of these declines in domestic production, imports of wood pulp rose by 32 percent from 470,600 tonnes, to 619,000 tonnes between 1987 and 1993.

The long-term recovery of the pulp industry will require larger plants that can take advantage of economies of scale. Mexico's pulp plants average 100,000 tonnes of annual capacity, compared with an international average of about 250,000 tonnes.

### THE PAPER SUBSECTOR

There are seven pulp and paper plants and another 58 paper producers in Mexico. Paper production capacity peaked at 3.8 million metric tons in 1991, and it has contracted somewhat since then. A small upturn is predicted for 1995, partly because the devaluation of the peso has allowed idle capacity to be put back into production.

### Production of Wood Pulp '000s of tonnes

	1993	1994
Bleached wood	92.7	57.7
Short sulfate fibre	27.7	27.7
Non-bleached wood	88.4	74.2
White plant fibres	121.3	116.7
Non-white plant fibres	0.1	0
Mechanical paste	13.4	0
<b>Total</b>	<b>343.6</b>	<b>276.3</b>

Source: *Cámara Nacional de las Industrias de la Celulosa y del Papel (CNICP)*, National Chamber of the Pulp and Paper Industry.

During 1994, total consumption of fibrous materials for paper manufacturing rose by 5.7 percent to reach 3.2 million tonnes. The proportion of virgin fibre decreased from 26.2 percent in 1993 to 12.1 percent the following year. The industry compensated for a shortage of domestic wood fibre by using more secondary fibres. More than 41 percent of all fibrous raw materials were imported during 1993.

Total production of paper rose by 3.5 percent in 1994, to reach 2.9 million tonnes, which is about 75 percent of capacity. Paper for box materials and cardboard dominate the industry, accounting for more than half of all production. These are also the fastest growing products: 1994 production was up by 14 percent. According to officials of the *Cámara Nacional de las Industrias de la Celulosa y del Papel (CNICP)*, National Chamber of the Pulp and

### Fibre Consumption, 1994

	Domestic	Imported	Total
Virgin fibre	288.0	394.3	682.3
Secondary fibre	1,600.0	947.1	2,547.1
<b>Total</b>	<b>1,888.0</b>	<b>1,341.4</b>	<b>3,229.4</b>

Source: *Cámara Nacional de las Industrias de la Celulosa y del Papel (CNICP)*, National Chamber of the Pulp and Paper Industry.

## Paper Production, 1993-1994

'000s of tonnes

	1993	1994
Newspaper and book paper	233.6	217.8
Other writing and printing paper	489.2	435.4
Sacks, bags and wrapping paper	259.1	226.8
Paper box materials	1,062.9	1,211.1
Cardboard	245.8	280.3
Sanitary and facial paper	446.7	463.6
Special paper	26.2	25.1
<b>Total</b>	<b>2,763.5</b>	<b>2,860.1</b>

Source: *Cámara Nacional de las Industrias de la Celulosa y del Papel (CNICP)*, National Chamber of the Pulp and Paper Industry, *CNICP Boletín Ejecutivo*, *CNICP Executive Bulletin*, April 1995, Table 3.

Paper Industry, this gain is explained by the increased demand for packaging materials from exporting industries and from the agricultural sector.

Competition from foreign producers has forced the industry to become more efficient, and there has been a substantial drop in employment as a result. Between 1987 and 1993, about 41,000 jobs were lost. The cuts were particularly large in pulp operations. The modernization efforts resulted in an increase in labour productivity from 10.1 tonnes per employee in 1987 to 11.9 tonnes in 1993.

## THE ROLE OF IMPORTS

Imports of forest products into Mexico have increased steadily since the process of trade liberalization began in late 1980s. Import penetration by value has been estimated for 1994 at about 35 percent for paper products and roughly 57 percent for wood products.

Pulp and paper imports rose steadily from US \$821 million in 1989 to almost US \$2.5 billion in 1994. The import market is dominated by the United States, which claimed about 84 percent of it in 1994. Canada's share of the market nearly doubled to US \$124.5 million in 1994 to

reach about 5 percent. About 40 percent of Canada's sales were pulp products and another 14 percent was newsprint.

The sharp devaluation of the peso in December 1994 resulted in an abrupt reversal of the trend towards increased imports. Although official data are not yet available, industry analysts predict that 1995 imports will fall by about half for both wood and paper products.

## Mexican Imports From Canada Pulp and Paper Products

US \$

Commodity	1992	1993	1994
Mechanical wood pulp	3,268,727	2,910,818	0
Chemical wood pulp, dissolving	42,013	85,501	235,549
Chemical wood pulp soda or sulphate	8,598,693	15,431,504	20,622,420
Chemical wood pulp sulphite	624,399	72,277	39,583
Semichemical wood pulp	11,245,500	11,361,431	30,471,864
Paper waste and scrap	1,441,020	842,954	28,090
Newsprint	15,711,874	12,754,146	17,072,938
Uncoated paper and paperboard	1,232,579	3,785,370	14,946,366
Toilet or facial tissue stock	102	184	106,317
Uncoated kraft liner	354,632	2,755,565	3,145,490
Other uncoated paper and paperboard	33,818	454,093	143,533
Parchment, tracing paper, etc.	47	0	33,936
Composite paper and paperboard	1	11,932	144,223
Corrugated paper and paperboard	0	15,211	58
Carbon paper	485	8,700	20,584
Coated paper and paperboard	985,988	902,406	3,045,029
Paper wadding and webs	189,161	1,254,084	1,152,062
Filter materials	13	51	154
Cigarette paper	4,136	0	0
Wallpaper	96,171	168,338	429,405
Floor coverings	11,365	0	7,527
Envelopes, postcards	781	1,040	65,527
Toilet paper	1,506,803	1,382,674	1,609,773
Cartons, boxes, bags of paper	5,062,922	8,778,704	27,581,993
Notebooks, writing pads, etc.	301,350	411,750	367,661
Labels	741,207	819,020	1,732,963
Bobbins and spools	13	69,726	5,310
Other articles of paper and paperboard	382,056	297,044	1,489,826
<b>Total</b>	<b>51,835,856</b>	<b>64,574,523</b>	<b>124,498,179</b>

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



## CUSTOMERS

In 1994, Mexican consumption of paper totalled 3.8 million tonnes. This was an increase of 10.5 percent over 1993. Since domestic production was only about 2.8 million tonnes, an increase in imports was needed to support this level of consumption. About two-thirds of all paper consumption occurs in Mexico City and its outskirts.

### Paper Markets

Percentage of total

<b>Packaging</b>	<b>27</b>
Food	12
Cement	4
Pharmaceuticals	3
Others	8
<b>General business</b>	<b>20</b>
Financial sector	5
Others	15
<b>Educational</b>	<b>17</b>
<b>Graphic arts</b>	<b>16</b>
Newsprint	5
Others	11
<b>Home sector</b>	<b>11</b>
<b>Government</b>	<b>9</b>
<b>Total</b>	<b>100</b>

Sources: *Cámara Nacional de las Industrias de la Celulosa y del Papel (CNICP)*, National Chamber of the Pulp and Paper Industry, Jefferson Smurfit Group of Ireland (SMURFIT), Kimberley-Clark.

### Packaging

The most important user of packaging paper and paperboard is the food and beverage sector. The packaging industry is dominated by a small number of integrated companies which produce both the paper and the finished packaging. The Jefferson Smurfit Group of Ireland (SMURFIT) is the leading producer in the packaging industry, and is one of the largest consumers of secondary fibers. It operates a large paper mill at Ecatepec, Estado de México.

### Newsprint

All of Mexico's newsprint is produced by *Productores e Importadores de Papel (PIPSA)*, Producers and Importers of Paper. This is a group of three government-owned or government-backed manufacturers. *PIPSA* is also the main importer of newsprint.

As part of the government's policy of encouraging pro-government newspapers, *PIPSA* will pay for imported paper in cash, and then sell it to friendly newspapers for credit. *PIPSA* also provides warehousing facilities for imported paper. The larger independent newspapers, including *El Universal*, *Reforma*, *Excelsior*, *El Financiero*, and *La Jornada* import most of their paper directly, despite the extra cost.

### Sanitary and Facial Products

Sanitary and facial products are purchased mainly by retail stores, especially supermarkets, and institutions. Raw stock for these products is purchased by some Mexican manufacturers. Kimberley-Clark produces 47 percent of all sanitary and facial papers, followed by *Compañía Industrial de San Cristobal*, Scott Paper, with a 30 percent market share. Other manufacturers include: *Fábricas de Papel Loreto y Peña Pobre* (10 percent), *Compañía Papelera Maldonado* (4 percent), *Fábricas de Papel Potosí* (3 percent) and *Fábrica de Papel Finess* (1 percent). According to recent media reports, Scott Paper and Kimberley-Clark are in the process of merging their Mexican operations.

### Publishing and Printing

There are about 1,200 registered editors in Mexico. This includes roughly 800 private companies, 10 institutions, 100 government agencies and 65 personal editors. The total number of editors has fallen sharply over the past few years

because of a decline in the book industry caused by imports. This industry is highly concentrated, with less than 10 percent of the companies accounting for three-quarters of all publications. Typical print runs are between 2,000 and 5,000 copies and they rarely exceed 10,000 copies. The magazine printing industry includes some 250 establishments, but it is dominated by two firms: *Talleres Rotográficos Zaragoza* and *Offset Multicolor*.

The *Secretaría de Educación Pública (SEP)*, Secretariat of Public Education, provides free textbooks to all public schools. Private schools are allowed to use non-governmental textbooks but are also entitled to official textbooks. In an effort to remain politically independent, *SEP* imports directly, mostly from Canada.

## COMPETITION

The sharp devaluation of the peso in December 1994 has changed the competitive situation considerably. Prior to the devaluation, the markets for paper products were strongly oriented towards quality and service. Now, customers are more interested in price and financing.

Paper buyers say that they are now willing to accept small defects in colour or texture in return for lower prices. The willingness to accept lower quality is an advantage for Mexican firms, which generally have difficulty meeting international standards of quality.

Capital is scarce and very expensive in Mexico. Companies that can take advantage of lower financing costs in Canada to offer deferred payments and preferential interest rates will enjoy a competitive advantage. The ability to hedge against future devaluations by denominating contracts in pesos is also a benefit.

## Mexican Competitors

The largest manufacturers of industrial and business paper are Kimberley-Clark, *Compañía Industrial de San Cristobal*, Scott Paper and the Jefferson Smurfit Group of Ireland (SMURFIT). They manufacture a full range of papers, except for newsprint. They have pulp mills throughout the southern, eastern and central regions of the country. Some of these mills are integrated with papermaking facilities. Others send the pulp to a paper mill closer to major markets. These companies prefer to import fibres rather than finished products.

All of Mexico's newsprint is produced by *Productores e Importadores de Papel (PIPSA)*, Producers and Importers of Paper, which is a group of three government-owned or government-backed plants. *PIPSA* is also responsible for purchasing most imported newsprint.

## Foreign Competition

Mexican paper producers are expected to have no difficulty selling their entire output. The capacity of the industry, however, is less than three-quarters of the demand, by volume. Therefore the principal competitors for Canadian producers are other foreign suppliers. The United States claimed an 84 percent import market share in 1994. Canada was the second-largest supplier with about 5 percent of the import market, followed by Brazil with 2 percent. Brazil is expected to increase its market share as a result of the devaluation.

## PRODUCT TRENDS

Government and industry officials predict that the pulp and paper industry will expand to full capacity and may grow slightly over the 1996 to 1998 period. Plants that were idled in 1994 are being brought back

into production as a result of the devalued peso. But the industry still does not have sufficient capacity to supply local demand for either pulp or paper.

There is some concern that Mexican pulp and paper producers will take advantage of the devaluation to export some of their output. This would allow them to earn hard currency to service their debt. But it would also open new opportunities for foreign suppliers to build market share. The *Cámara Nacional de las Industrias de la Celulosa y del Papel (CNICP)*, National Chamber of the Pulp and Paper Industry, is trying to get voluntary agreement on a no-exports policy, because they fear that otherwise the government might act to reserve production for the domestic market.

## Pulp

Production of pulp is increasingly dependent on foreign raw materials. In recent years, Mexico has imported more than one-third of its wood fibres, with imports totalling more than US \$300 million in 1994. More than three-quarters of this pulp came from the United States. Canada's sales totalled US \$51 million, for an import market share of almost 17 percent. Brazil has been supplying increasing quantities of eucalyptus-derived cellulose. In 1995, the devaluation is expected to cut imports sharply by allowing Mexican suppliers to put idle capacity back into production. But even with the pulp subsector operating at maximum output, imports will continue to account for at least 15 percent of Mexican consumption.

According to industry sources, short, white primary fibres are in strong demand because of the lack of domestic capacity to produce them. Nor will Mexico be able to meet its own needs for secondary fibres.

## Paper

A recent report by the *Grupo Financiero Bancomer* predicts a "slight uptum" for the paper industry in 1995, as a result of modernization efforts and the devaluation of the peso. Import penetration is expected to fall, perhaps by as much as half. Nonetheless, certain finished products will continue to be imported:

- kraft types
- mullen
- papers suitable for "exploding"
- better quality newsprint paper
- specialty art papers

The market for packaging materials is expected to grow by 30 percent by 1996, on the strength of higher export activities. This in turn will drive a demand for imported virgin fibres.

## THE REGULATORY ENVIRONMENT

In early 1995, the Zedillo administration created a new department, the *Secretaría del Medio Ambiente, Recursos Naturales y Pesca (SEMARNAP)*, Secretariat of the Environment, Natural Resources and Fisheries. The secretariat took over responsibility for the forestry sector from the *Secretaría de Agricultura y Recursos Hidráulicos (SARH)*, Secretariat of Agriculture and Water Resources. *SEMARNAP* is now responsible for the enforcement of the *Ley Forestal*, Forestry Law. It also maintains an inventory of forest resources, and publishes statistical data on the sector.

The change is intended to increase the synergy between the various segments of the natural resource sector and to develop them in a sustainable, environmentally appropriate way. Within *SARH*, forestry had been seen as a competitor with agriculture for available land, rather than a

renewable resource. There are no changes expected to the *Ley Forestal*, as a result of this reorganization, although SEMARNAP is expected to implement its land reform provisions more aggressively.

Under the regulations, SEMARNAP is responsible for coordinating agreements between state and municipal governments, government enterprises, *ejidos*, community properties, and private corporations.

Virtually every aspect of forestry exploitation is subject to permits, technical studies and a variety of other requirements. Most observers believe that compliance with these requirements will become less onerous under SEMARNAP.

Mexico has a system of mandatory standards known as *Normas Oficiales (NOMs)*, official standards. These standards may be issued by any government secretariat. Products that are subject to these mandatory requirements must be tested and issued a certificate of compliance prior to importation. Some wood products are subject to regulation, but there are presently no mandatory standards that affect paper products. The *NOMs* are subject to frequent change and exporters should check the requirements with the importer before shipments leave Canada.

## MARKET ENTRY STRATEGIES

Most paper producers sell only to large end-user clients, distributors, or major retailers. The small retailers generally buy from the distributors.

Paper producers rely heavily on advertising to promote their industrial and business products. Advertising in specialty magazines and trade journals is common. Samples are usually provided to important retail clients and distributors. Industrial

clients are often approached directly by the producers' sales force.

Producers occasionally take custom orders for paper products. These come mostly from printing houses that require specialty papers for certain editions. Because of higher costs, however, clients who previously placed custom orders are now buying stock American products not available in Mexico.

A few importers and distributors have traditionally catered to the demand for specialty papers for the arts, and certain types of business papers. These Mexican companies dealt almost entirely in imports. The devaluation has swept most of them aside. According to industry sources, Georgia Pacific is now the only independent importer and distributor of any significance. It has important foreign connections and it handles a range of "universal types". The company is limited by the time required to import and deliver specialty products, because it maintains only small inventories.

As in other sectors, partnerships or joint ventures with Mexican manufacturers or distributors are a good way to enter the market. Typically, the Canadian partner contributes technology, management know-how and capital. In return, the Mexican partner can offer local market knowledge and contacts, as well as low-cost value-added.

## KEY CONTACTS

### CANADA

#### Canadian Government

#### *Department of Foreign Affairs and International Trade (DFAIT)*

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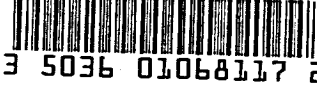
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**Canadian Consulate**  
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 Local 30-A  
 Aurelio Aceves No. 225  
 Col. Vallarta Poniente  
 Guadalajara, Jalisco  
 México  
 Tel.: 15-8665  
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#### **Natural Resources Canada**

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#### **Department of Industry**

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#### **Sponsoring Organizations**

**Baker & McKenzie**  
 Barristers & Solicitors  
 BCE Place  
 181 Bay Street  
 Suite 2100  
 Toronto, ON M5J 2T3  
 Tel.: (416) 865-6910/6903  
 Fax: (416) 863-6275

#### **Business and Professional Associations**

**Canadian Wood Council**  
 1730 St. Laurent Boulevard  
 Suite 350  
 Ottawa, ON K1G 5L1  
 Tel.: (613) 247-7077  
 Fax: (613) 247-7856



**Canadian Wood Preservers Bureau**

2430 Don Reid Drive  
Suite 200  
Ottawa, ON K1A 8P5  
Tel.: (613) 737-4337  
Fax: (613) 247-0540

**Canadian Pulp and Paper Association**

Sun Life Building  
Nineteenth Floor  
1155 Metcalfe Street  
Montreal, PQ H3B 4T6  
Tel.: (514) 866-6621  
Fax: (514) 866-3035

**Bureau du Promotion des industries du bois**

979 de Bourgogne Road  
Suite 320  
Sainte-Foy, PQ G1W 2L4  
Tel.: (418) 650-2424  
Fax: (418) 650-2423

**Council of Forest Industries of British Columbia**

555 Burrard Street  
Twelfth Floor  
Vancouver, BC V6E 3N9  
Tel.: (604) 684-0211  
Fax: (604) 687-4930

**Canadian Council for the Americas Executive Offices**

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

**Canadian Exporters' Association**

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

**Canadian Manufacturers' Association**

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

**The Canadian Chamber of Commerce**

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

**Forum for International Trade and Training Inc.**

155 Queen Street  
Suite 608  
Ottawa, ON K1P 6L1  
Tel.: (613) 230-3553  
Fax: (613) 230-6808

**Language Information Centre**

240 Sparks Street RPO  
Box 55011  
Ottawa, ON K1P 1A1  
Tel.: (613) 523-3510

**Open Bidding Service**

P.O. Box 22011  
Ottawa, ON K1V 0W2  
Tel.: 1-800-361-4637 or  
(613) 737-3374

**Canadian Standards Association**

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

**Standards Council of Canada**

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

**Mexican Embassy in Canada**

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

**MEXICO****Government Departments****Secretariat of Commerce and Industrial Development**

*Secretaría de Comercio y Fomento Industrial (SECOFI)*  
*Sub-Secretaría de Promoción de la Industria y el Comercio Exterior*  
Insurgentes Sur No. 1940 - P.H.  
Col. Florida  
01030 México, D.F.  
México  
Tel.: 229-6560/6561, 229-6100  
Fax: 229-6568

**Secretariat of Commerce and Industrial Development Bureau of Standards**

*Secretaría de Comercio y Fomento Industrial (SECOFI)*  
*Dirección General de Normas*  
Av. Puente de Tecamachalco No. 6  
Col. Lomas de Tecamachalco  
53950 Tecamachalco, Estado de México  
México  
Tel.: 729-9300  
Fax: 729-9484

**Secretariat of Public Education Secretaría de Educación Pública (SEP)**

Argentina No. 28, Piso 2  
Col. Centro  
06029 México, D.F.  
México  
Tel.: 510-2557, 512-0358,  
328-1000/1067  
Fax: 518-4350, 5218293

**Secretariat of the Environment, Natural Resources and Fisheries**

*Secretaría del Medio Ambiente, Recursos Naturales y Pesca (SEMARNAP)*  
Periférico Sur No. 4209  
Col. Jardines en la Montaña  
14210 México, D.F.  
México  
Tel.: 628-0602/0605  
Fax: 628-0643/0644



**Secretariat of Agriculture,  
Livestock and Rural Development**  
*Secretaría de Agricultura, Ganadería  
y Desarrollo Rural (SAGAR)*  
Insurgentes Sur No. 476, Piso 13  
Col. Roma Sur  
06760 México, D.F.  
México  
Tel.: 584-0786/0271/6288  
Fax: 584-2699

***Business and Professional  
Associations in Mexico***

**National Chamber of Forest  
Products Industry**  
*Cámara Nacional de la Industria  
Forestal (CNIF)*  
Viaducto Miguel Alemán No. 277  
Col. Escandón  
11800 México, D.F.  
México  
Tel.: 273-0986  
Fax: 273-0933

**Mexican Association of  
Technicians of the Pulp and Paper  
Industry**  
*Asociación Mexicana de Técnicos de  
las Industrias de la Celulosa  
y del Papel, A.C. (ATCP)*  
Lafayette No. 138  
Col. Anzures  
11590 México D.F.  
México  
Tel.: 254-7700/7990  
Fax: 203-8521

**National Chamber of the Pulp and  
Paper Industry**  
*Cámara Nacional de las Industrias  
de la Celulosa y del Papel (CNICP)*  
Privada de San Isidro No. 30  
Col. Reforma Social  
11650 México, D.F.  
México  
Tel.: 202-8603  
Fax: 202-1349

**Paper Producer and Importer**  
*Productora e Importadora de Papel  
(PIPSA)*  
Poniente 140 No. 840  
Col. Industrial Vallejo  
02300 México, D.F.  
México  
Tel.: 729-7001 through 99  
Fax: 567-4482/1555

**National Advisory Board for Wood  
in Construction**  
*Consejo Nacional de la Madera en  
la Construcción, A.C. (COMACO)*  
Quintana Roo No. 141-603  
Col. Hipódromo Condesa  
06170 México, D.F.  
México  
Tel.: 564-1124/5007  
Fax: 277-6715

**National Association of Wood  
Board Manufacturers**  
*Asociación Nacional de Fabricantes  
de Tableros de Madera, A.C.*  
Viaducto Miguel Alemán No. 277  
Col. Escandón  
11800 México, D.F.  
México  
Tel.: 573-0986  
Fax: 273-0933

**Scott Paper**  
*Compañía Industrial de San  
Cristobal, S.A.*  
Manuel María Contreras No. 133  
Col. San Rafael  
06470 México, D.F.  
México  
Tel.: 326-2200, 326-6600  
Fax: 326-2262

*Loreto y Peña Pobre, S.A. de C.V.*  
Av. San Fernando No. 649  
Col. Peña Pobre  
14060 México, D.F.  
México  
Tel.: 723-9600  
Fax: 606-7698

*Kimberley-Clark de México, S.A. de  
C.V.*  
J.L. Lagrange No. 103  
Col. Chapultepec Morales  
11510 México, D.F.  
México  
Tel.: 282-7300/7200  
Fax: 282-7342

*Compañía Papelera Maldonado,  
S.A. de C.V.*  
Comte No. 44  
Col. Anzures  
11590 México, D.F.  
México  
Tel.: 203-7140/5588  
Fax: 255-3011

*Fábrica de Papel Potosí*  
Av. Tezozomoc No. 246  
Col. San Pedro Jalpa  
02799 México, D.F.  
México  
Tel.: 352-8373/8188  
Fax: 352-8947

*Talleres Rotográficos Zaragoza*  
Calle 3 No. 48  
Fraccionamiento Alce Blanco  
53370 Naucalpan, Estado de México  
México  
Tel.: 357-0196, 359-1261  
Fax: 359-1701