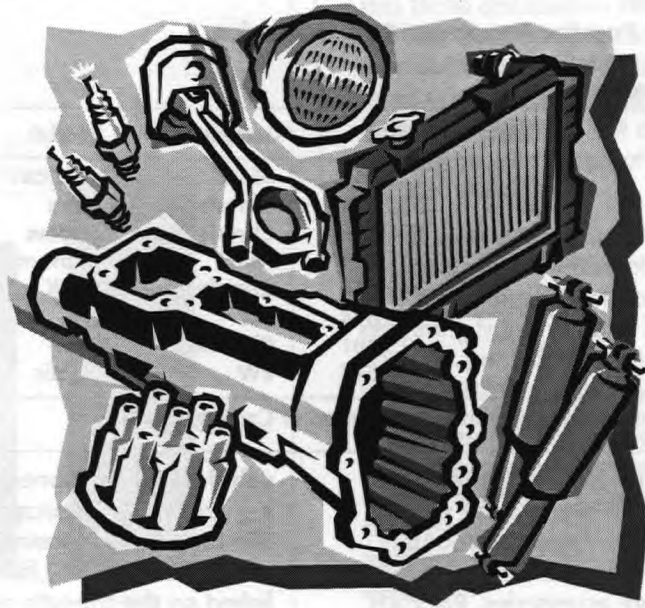


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Automotive Aftermarket Products



HIGHLIGHTS

There are major opportunities for Canadian companies in the Mexican automotive aftermarket parts sector:

- vehicle ownership is growing rapidly in Mexico;
- average vehicle age is 12 years, generating a large demand for replacement parts and accessories;
- reduced tariffs will improve the competitiveness of Canadian parts;
- Mexican parts companies will be forced to become more competitive, creating opportunities for joint ventures with Canadian producers;
- the Mexican parts distribution system is inefficient and can benefit from joint venture partnerships;
- parts sales through retail chains and franchises are an emerging trend; and
- new environmental regulations are increasing the demand for diagnostic, maintenance and repair equipment.

THE OPPORTUNITY

As a result of the Canada-U.S. Auto Pact, and the access afforded to Mexican producers under that Agreement, the North American auto industry is already highly integrated. Under the North American Free Trade Agreement (NAFTA), it will continue to function in a "managed trade" environment.

Although aftermarket parts were not covered by the Auto Pact, the Canada-U.S. Free Trade Agreement

(FTA) has created almost unhindered trade in these parts between the U.S. and Canada. The NAFTA will extend these conditions to Mexican markets. The result will be enormous opportunities for Canadian parts manufacturers, especially Canadian-owned firms, free to sell and invest in Mexico.

As the NAFTA changes are phased in, local content requirements for vehicles will disappear, and Mexican parts companies will come under increasing foreign competition. They will be seeking joint ventures with Canadian and U.S. companies that can make them technologically competitive.

THE MEXICAN AUTOMOTIVE PARC

Mexico's vehicle fleet (or *parc*) is much different from Canada's, and this greatly affects sales of aftermarket parts. According to official records, there were about 10 million vehicles in use in Mexico in 1990. Other estimates suggest that the true number may be significantly lower, with perhaps one passenger car for every 15 people. The average vehicle age is between 10 and 12 years, compared with seven years in Canada and eight in the U.S.

SUMMARY REPORT

The Department of Foreign Affairs and International Trade has prepared a market profile entitled *Opportunities in Mexico: Automotive Aftermarket Products*. The Table of Contents for this profile is listed below. This summary of the **Automotive Aftermarket Products in Mexico** profile has been produced and published by Prospectus Inc. under the Access North America Program, along with other sector profiles and summaries on business opportunities in Mexico. It is available from:

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

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There are two positive implications for aftermarket parts suppliers. First, the automobile is more of a luxury in Mexico than in the rest of North America. The family car is usually a prized asset, and maintenance is



The Most Popular Passenger Cars in Mexico

1971-1992 Model Years

US \$ unit sales

Company	Model	Sales	Company	Model	Sales
VW	Beetle	979,454	AMC	American	142,467
Nissan	Tsuru	552,774	Chrysler	Volare	134,704
Nissan	Datsun	371,264	Chrysler	Shadow	132,706
VW	Caribe	301,351	Ford	Fairmont	124,664
Chrysler	Dart	219,455	Chrysler	Dart K	113,048
Ford	Topaz	203,674	VW	Jetta	111,367
Renault	Renault	173,491	Chrysler	Spirit	104,688
VW	Golf	148,547	VW	Atlantic	102,292

Source: Automotive Industries Association of Canada (AIAC).

a high priority. Second, since the vehicles are on average five years older than their Canadian counterparts, they need more maintenance and use more accessories. Rigorous emission inspections in urban areas are also increasing maintenance expenditures.

The average annual maintenance expenditure per vehicle is estimated at between US \$1,200 and US \$1,500. Mexico's low labour costs mean that a large proportion of this outlay is spent on parts and accessories.

Some other characteristics of the Mexican vehicle *parc* may work against Canadian suppliers. The model mix is much different than in Canada. For example, the most popular passenger cars are the Volkswagen Beetle and the Nissan Tsuru, which together captured more than 40 percent of the 1992 new car market. Another downside consideration is that do-it-yourself buyers, who are an important market segment in Canada, are unusual in Mexico.

THE AUTOMOTIVE PARTS SECTOR

The Mexican motor vehicle parts industry was established through a series of industrial policies beginning with the presidential automotive decree of 1962. Subsequent decrees in 1973, 1977, 1983 and 1989 had the dual effect of increasing exports of both

vehicles and components while ensuring substantial Mexican value-added. The local parts industry, now composed of about 540 firms, was established on the strength of this demand.

The parts producing companies supply both the multinational vehicle manufacturers and the *maquiladora* operations that export components. About one-third of the output of the domestic industry goes to the aftermarket. The Mexican-owned parts plants generally lack the technology and facilities to meet the quality standards required by export markets. Protection has allowed them to survive, but the assemblers have often had difficulties meeting domestic content requirements.

Efforts to overcome these problems have fostered the growth of technology alliances with foreign firms. This type of joint venture will become increasingly competitive to supply the Original Equipment Manufacturers (OEMs), which are actively encouraging technology alliances. Since the OEMs dominate the aftermarket for hard parts through their dealers, their suppliers enjoy a natural advantage in the aftermarket as well. Recently, several Canadian companies, including Magna, Woodbridge, ABC Plastics, and SKD, have entered into technology alliances with Mexican companies. In the future, Canada's recognized strengths in clean vehicle and alternative fuel technology will lead to additional opportunities.

FOREIGN TRADE

In 1983, the Mexican government issued the "Rationalization of the Car Industry Decree" which was designed to shift the industry to an export orientation. Three years later, another decree further liberalized the foreign trade rules. For the first time, qualifying manufacturers were allowed to import vehicles.

This liberalization increased parts imports dramatically over the ensuing years. Import penetration in auto parts now exceeds two-thirds of the market when the imports of the *maquiladora* producers are included, as they are in the charts below. The large majority of imports, about 86.5 percent, are for Original Equipment Manufacturer (OEM) vehicle manufacture. The aftermarket makes up 13.5 percent of imports. This segment has grown rapidly from US \$640 million in 1989 to an estimated US \$1 billion in 1992. The *Banco de México*, Mexico's Central Bank, which produced these estimates, uses a relatively narrow definition of the industry, and estimates of parts imports from other sources are somewhat larger.

Mexico is now the third-largest supplier of auto parts to the U.S., mainly because of exports of engines and other components from the *maquiladora* plants. Mexican-owned parts producers directly exported about US \$500 million worth of parts in 1990, but in general, they have difficulty meeting international quality standards.

AFTERMARKET SIZE AND COMPOSITION

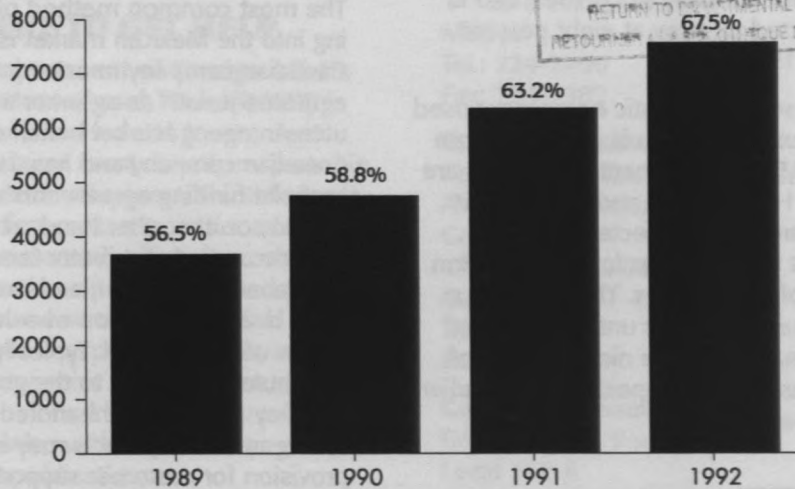
Estimates by the Automotive Industries Association of Canada (AIAC) suggest that the total Mexican aftermarket parts sector at retail value was worth approximately US \$12 billion in 1992, with a growth rate of 12 percent per year. The market is projected to grow



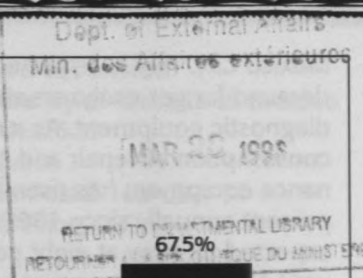
Auto Parts Imports

Percentage of Domestic Consumption

\$US millions



Source: Industria Nacional de Autopartes (INA), National Auto Parts Industry.



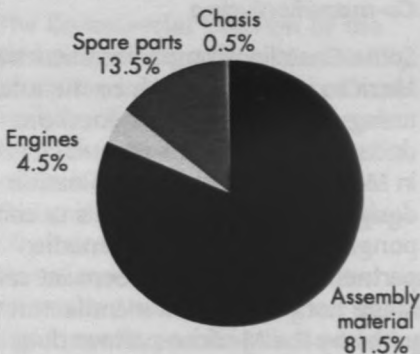
The market is divided roughly equally into three distribution streams: direct sales to OEM dealers, sales to service establishments by wholesalers, and retail sales. Including their purchases from wholesalers, OEM dealers account for about half of the total parts aftermarket.

Retail sales are relatively high because older cars are often serviced by small independent mechanics, operating from home or in the streets. They get parts from local retailers or from customers who buy their own.

Tire stores and automotive centres in retail chains are beginning to capture a larger segment of the market, especially for tires, oil changes, shocks, mufflers, brakes and other underbody items.

Parts distribution is not as concentrated in Mexico as it is in the rest of North America. There are perhaps 50 significant distributors, while an additional 500 companies operate as jobber/wholesalers. Only five of the largest distributors operate substantial warehouses, and they are small by Canadian standards. They typically carry name brand parts with up to 20,000 different items in stock at any time.

Imports by Category, 1992



Source: Banco de México, Mexico's Central Bank.

to more than US \$34 billion by the turn of the century. Compared with Canada's saturated automotive markets, it represents an enormous opportunity.

Not all this spending is for parts, but the parts component is larger in Mexico than in the United States and Canada. Labour costs are comparatively low and parts costs are high due to tariffs and inefficient distribution. The older Mexican vehicle *parc* also creates more sales of accessories (see table).

PARTS DISTRIBUTION

Five original equipment manufacturers constitute the total market for Original Equipment Manufacturer (OEM) car parts. They are the U.S. "big three" plus Volkswagen and Nissan. Another six companies make heavy trucks and buses. The U.S. Office of Technology Assessment projects their 1995 consumption of parts at US \$8.7 billion.

Aftermarket Spending By Category Share, 1992

Percentage of total

	Mexico	U.S.	Canada
Labour	25	50	40
Hard parts	48	29	38
Motor oil and chemicals	5	4	4
Tires	14	10	12
Accessories	8	7	6

Source: DesRosiers Automotive Consultants and the Automotive Parts and Accessories Association (APAA), Washington, D.C., U.S.A.

PRODUCT OPPORTUNITIES

Interviews conducted in Mexico by the Automotive Industries Association of Canada (AIAC) identified a number of specific opportunities for which Canadian producers are well suited. The most important are: rebuilt parts, filters and batteries, tires, accessories, and garage equipment and tools.

Rebuilt Parts

There is no established supply of rebuilt parts in Mexico, and this situation creates an opportunity for Canadian companies with experience in this field. Parts in this category might include alternators, starters, carburetors, water pumps, clutches and brake products. Joint ventures with local companies which can sup-



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ply "cores" would probably produce the best results.

Filters and Batteries

The market for filters and batteries is dominated by Mexican manufacturers. One company makes all three brands of Mexican batteries. There are two filter makers: *Continental* and *Groeling*. Local production has been fostered by trade barriers that will be removed under the NAFTA, and this will create opportunities for Canadian manufacturers.

Tires

Mexico has six tire manufacturers, operating 11 plants. Four of the companies are foreign-owned. The plants are old and inefficient, and will probably close as trade barriers fall. Tires are already one of the largest categories of imported parts. According to the *Industria Nacional de Autopartes (INA)*, National Auto Parts Industry, cumulative imports of car, bus and tractor tires totalled US \$550 million between 1989 and April of 1993. The most common tire brands are Goodyear, Uniroyal, *Coronado* and Michelin.

Accessories

Accessories is a rapidly growing segment of the Mexican automotive parts aftermarket. In 1990, the market was valued at US \$422 million with import penetration of about 20 percent. Market growth is projected at 12 percent for the next few years. Mexico exported about US \$36.8 worth of accessories in 1990, amounting to about 10 percent of local production.

Garage Equipment and Tools

The rapid growth of automobile sales and the pressure for improved efficiency have created a substantial and growing demand for garage equipment and tools. Liberalized trade policies have eased the import restrictions on this equipment. In 1989, a mandatory program of environmental controls and twice-yearly vehicle testing was implemented in

Mexico City. This has spurred a heavy demand for gas analyzers and other diagnostic equipment. As a result, consumption of repair and maintenance equipment has risen by 12 percent annually since 1989 and is expected to grow at eight percent until 1995.

Almost all diagnostic equipment used in Mexican garages is imported from the U.S. The dominant companies are Bear, Hunter, FMC and Sun. Import penetration is expected to fall to about two-thirds as local production capability increases. The market for mechanics tools is underdeveloped and may provide a niche market of interest to small, specialized Canadian companies.

COMPETITION

Canadian exporters of aftermarket parts face competition mainly from the Mexican parts industry and from the Original Equipment Manufacturers (OEMs). The competition is stiff, because Canadian producers are not generally configured for the Mexican market. About 40 percent of 1992 car sales were two models: Volkswagen Beetles and Nissan Tsurus. The competitive situation will improve as Mexico's vehicle fleet is gradually upgraded to incorporate more modern technology.

Mexican parts manufacturers have survived because of strong protective measures that are now being phased out. To remain competitive, they will increasingly have to form technology alliances or other joint ventures with foreign firms. This represents a major opportunity for Canadian-owned parts companies that are free to enter the Mexican market.

MARKET ENTRY STRATEGIES

Agents and Distributors

The most common method of moving into the Mexican market is for the Canadian company to enter into an agreement with an agent or a distributor. An agent acts on behalf of the Canadian company and has the power to make binding agreements. A distributor, on the other hand, acts on its own account. A distributor cannot bind the Canadian supplier, and exercises a great deal of discretion over how the goods will be re-sold. Typically, the distributor takes title to the goods, but they may also be handled on consignment. Contracts may include provision for customer support and warranties, but unlike the agency contract, there is no general obligation on the distributor's part to act in the best interests of the Canadian supplier.

Co-manufacturing

Some Canadian companies enter the Mexican market through co-manufacturing arrangements with local producers. The product is manufactured in Mexico using some combination of design, technology, materials or components supplied by the Canadian partner. Terms of the agreement can range from simple toll manufacturing, whereby the Mexican partner does the work for a fee, to joint ventures where both partners share the risks.

Trade Shows

Attending trade shows in Mexico is a very effective way to make contacts. The best shows are those sponsored by local trade associations or by Canadian or U.S. industry organizations. The Canadian Embassy in Mexico City and the trade office in Monterrey can also be helpful.

Companies that have succeeded in Mexico generally offer the same advice: prepare carefully, develop local partnerships, and be prepared to do business 'the Mexican way'. For



those ready to commit the necessary time and resources, the opportunities are outstanding.

WHERE TO GET HELP

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

InfoCentre

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

The **Commercial Division of the Embassy of Canada in Mexico City** promotes trade with Mexico. There are several trade commissioners at the Embassy, and there is a satellite office in Monterrey. Trade Commissioners can provide a range of services including introducing Canadian companies to potential customers in Mexico, advising on marketing channels, assisting those wishing to participate in trade fairs, helping identify suitable Mexican firms to act as agents, and compiling credit and business information on potential foreign customers.

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

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

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

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

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

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

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

Canadian International Development Agency

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





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

Export Development Corporation

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

EDC's programs fall into four major categories:

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

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

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

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

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

Mexican Foreign Trade Commission

Banco Nacional de Comercio Exterior (Bancomext) is the Mexican Trade Commission and has offices in Canada. It offers credits, export guarantees and counselling services for those seeking to do business in Mexico.

Mexican Banks with Offices in Canada

Banco Nacional de México (Banamex), *Banco de Comercio (Bancomer)* and *Banca Serfin* are private sector banks which 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 data bases throughout the world. These banks are located throughout Mexico, and maintain offices in Toronto.

Banco Nacional de México (Banamex)
1 First Canadian Place
Suite 3430
P.O. Box 299
Toronto, ON M5X 1C9
Tel.: (416) 368-1399
Fax: (416) 367-2543

Banco de Comercio (Bancomer)
The Royal Bank Plaza
South Tower, Suite 2915
P.O. Box 96
Toronto, ON M5J 2J2
Tel.: (416) 956-4911
Fax: (416) 956-4914

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

Business and Professional Associations

Automotive Industries Association of Canada (AIAC)

1272 Wellington Street
Ottawa, ON K1Y 3A7
Tel.: (613) 728-5821
Fax: (613) 728-6021

Automotive Parts Manufacturers Association (APMA)

195 The West Mall, Suite 516
Etobicoke, ON M9C 5K1
Tel.: (416) 620-4220
Fax: (416) 620-9730

The Canadian Council for the Americas (CCA) is a non-profit organization formed in 1987 to promote business interests in Latin American 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
145 Richmond Street West, Third Floor
Toronto, ON M5H 2L2
Tel.: (416) 367-4313
Fax: (416) 367-5460

Canadian Exporters' Association (CEA)

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



Canadian Manufacturers' Association (CMA)

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

The Canadian Chamber of Commerce (CCC)

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

Forum for International Trade and Training (FITT)

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

Canadian Freight Forwarders Association (CFFA)

Box 929
Streetsville, ON L5M 2C5
Tel.: (905) 567-4633
Fax: (905) 542-2716

Canadian Standards Association (CSA)

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

Standards Council of Canada

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

**ADDITIONAL CONTACTS
IN MEXICO**

Secretariat of Commerce and Industrial Development

Secretaría de Comercio y Fomento Industrial (SECOFI)
Subsecretaría de Comercio Exterior
Alfonso Reyes No. 30
Col. Hipódromo Condesa
06170 México, D.F.
México
Tel.: 729-9256/9257
Fax: 729-9343

American Chamber of Commerce in Mexico A.C. (AMCHAM)

Cámara de Comercio Americana en México A.C.
Lucema No. 78, Piso 2
Col. Juárez
06600 México, D.F.
México
Tel.: 705-0995
Fax: 535-3166

Mexican Automobile Association

Asociación Mexicana Automovilística
Orizaba No. 7
Col. Roma
06700 México, D.F.
México
Tel.: 208-8329
Fax: 511-6285

Mexican Automobile Distributors Association

Asociación Mexicana de Distribuidores de Automotores
Mercaderes No. 134
Col. San José Insurgentes
03900 México, D.F.
México
Tel.: 593-2644
Fax: 651-4599

Mexican Association of the Automobile Industry

Asociación Mexicana de la Industria Automotriz (AMIA)
Ensenada No. 90
Col. Condesa
06100 México, D.F.
México
Tel.: 272-1144, 277-1144
Fax: 515-2542

National Association of Tire Distributors and Retreading Plants

Asociación Nacional de Distribuidores de Llantas y Plantas Renovadoras A.C. (ANDELLAC)
Cuahtémoc No. 206
Col. San Pedro Iztacalco
08220 México, D.F.
México
Tel.: 696-7464/5654/1783
Fax: 579-1124

National Automobile Association

Asociación Nacional Automovilística
Miguel Schultz No. 140
Col. San Rafael
06470 México, D.F.
México
Tel.: 705-0133/0251
Fax: 546-0665

National Association of Importers and Exporters of the Mexican Republic

Asociación Nacional de Importadores y Exportadores de la República Mexicana (ANIERM)
Monterrey No. 130
Col. Roma
06700 México, D.F.
México
Tel.: 584-9522
Fax: 584-5317

National Association for Auto Part Wholesalers

Asociación Nacional de Mayoristas de Partes para Automóviles A.C. (ANAMAPA)
Dr. Lucio No. 127-202
Col. Doctores
06720 México, D.F.
México
Tel.: 578-3527
Fax: 578-8841



National Association of Representatives, Importers and Distributors of Auto Repair Parts and Accessories

Asociación Nacional de Representantes, Importadores y Distribuidores de Refacciones y Accesorios para Automóviles A.C. (ARIDRA)

Morelia No. 38-305

Col. Roma

06700 México, D.F.

México

Tel.: 514-3721, 525-2820

Fax: 207-6476

National Association of Autoservice Outlets

Asociación Nacional de Tiendas de Autoservicio y Departamentales

Homero No. 109, Piso 11

Col. Polanco

11560 México, D.F.

México

Tel.: 254-6220, 545-8803

Association of Auto Repair Shops

Asociación de Talleres Automotrices (ATA)

Bahía de Todos los Santos No. 168

Col. Verónica Anzures

11300 México, D.F.

México

Tel.: 260-6294

Fax: 260-7406

Association of Repair and Body Shops

Asociación de Rectificadores y Reconstructores Automotrices (ARRA)

J. Hernández y Dávalos No. 7

Col. Algarín

06880 México, D.F.

México

Tel.: 519-6448/4892

Fax: 519-6448

National Chamber of Commerce of Mexico City

Cámara Nacional de Comercio de la Ciudad de México (CANACO)

Paseo de la Reforma No. 42

Col. Centro

06048 México, D.F.

México

Tel.: 592-2677/2665

Fax: 592-3571

National Chamber for Industrial Transformation

Cámara Nacional de la Industria de la Transformación (CANACINTRA)

Av. San Antonio No. 256

Col. Ampliación Nápoles

03849 México, D.F.

México

Tel.: 563-3400

Fax: 598-5888

National Association of Bus and Truck Producers

Asociación Nacional de Productores de Autobuses, Camiones y Tractocamiones A.C.

Gabriel Mancera No. 114-A

Col. del Valle

03100 México, D.F.

México

Tel.: 882-2971

Fax: 523-1828

Association of Auto Repair Shops

Asociación Nacional de Talleres Automotrices A.C.

Fernando Rosas No. 745

Col. Barrio de San Miguelito

78330 San Luis Potosí, San Luis

Potosí

México

Tel.: 12-4766

Fax: 12-5706

National Federation of Car Repair Shops

Federación Nacional de Talleres Automotrices

Gómez Farías No. 955

Col. Centro

91700 Veracruz, Veracruz

México

Tel.: 31-5004, 36-0224

Fax: 32-8360

National Auto Parts Industry

Industria Nacional de Autopartes A.C. (INA)

Amatlán No. 19

Col. Condesa

06540 México, D.F.

México

Tel.: 553-2224

Fax: 286-4101

