

Mining Equipment and Services



THE OPPORTUNITY

The Mexican mining sector is expanding rapidly, creating important opportunities for Canadian suppliers of mining equipment and services.

- Mexico has major mineral reserves and is among the world's top ten producers of 15 different minerals.
- The Government of Mexico was the nation's largest mineral producer in 1991. Since then, it has sold all except one of the state-owned production companies to the private sector. These companies are quickly modernizing the antiquated plants they bought from the government.
- The government has dramatically cut the level of regulation of the mining industry, and has opened up millions of hectares of reserves to private development. Foreign companies can own 100 percent of new mining operations for the first 12 years.
- Canadian companies have been prominent among the foreign firms, moving into Mexico to take advantage of these opportunities. Since they are familiar with Canadian-made equipment and service suppliers, they represent a ready market.

FULL SPEED AHEAD

Mexico's mining sector has arguably been the biggest beneficiary of the nation's broad economic reforms. Deregulation has opened up tens of thousands of hectares of mineral reserves to development. Privatization policies have transferred responsibility for mineral exploitation to the private sector. New ownership laws have opened the

doors to foreign investors, while restrictions on the repatriation of dividends have been eliminated. At the same time, liberalized trade has boosted mineral exports.

The mining industry has been one of the few sectors to benefit from the December 1994 devaluation of the peso. For the most part, sales are in dollars while costs are in pesos. These factors have combined to create a boom in mineral development that has been led by foreign investment.

The biggest change came in September 1992, when a new mining law reinterpreted Article 27 of the Mexican constitution, which established state ownership of all mineral reserves. The new law created a much larger role for the private sector. It set the stage for wholesale privatization of state-owned mining companies. It deregulated mining reserves and encouraged both domestic and foreign investment in the mining industry.

The law allows direct foreign investment, with up to 100 percent ownership for an initial 12-year period. During this timeframe investors enjoy substantial tax concessions, but they must subsequently reduce their ownership to

SUMMARY REPORT

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

InfoCentre

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The market profiles are available in electronic form from the IBB and in hard copy at a cost of \$10.00 plus shipping and applicable taxes, from Prospectus Inc. Please contact:

Prospectus Inc. Order Department
Tel.: (613) 231-2727
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Department of Foreign Affairs and International Trade / Ministère des Affaires étrangères et du Commerce international

less than 50 percent as required by the 1993 investment law.

In December 1994, the administration of President Ernesto Zedillo took the liberalization process even further. The *Secretaría de Energía, Minas e Industria Paraestatal (SEMIP)*, Secretariat of Energy, Mines and State-owned Industries, was dismantled and mining responsibilities were shifted to the *Secretaría de Comercio y Fomento Industrial (SECOFI)*, Secretariat of Commerce and Industrial Development. The new mining division of *SECOFI* has a mandate to further develop the sector and these moves have been positively received by the international mining community. Some industry observers have projected that US \$6 billion will be invested in the mining sector over the next six years.

Canadian companies were quick to take advantage of these emerging opportunities and are among the leaders in developing partnerships with Mexican firms. According to media reports, the two largest mining developments currently underway involve Canadian Eldorado and Exall Resources. Other large Canadian companies active in Mexico include Cominco, Noranda and Placer Dome.

THE MINING SECTOR

Government policies have succeeded in expanding the mining sector. The value of mineral production rose by more than 24 percent in 1994 to reach almost \$10 billion pesos. Although the rate of growth declined during 1995, the industry continues to outperform the overall economy. Mining exports increased by 68 percent in the first eight months of 1995, more than double the increase for all exports.

Total production of the mining industry in 1993 was 2.5 million tonnes, according to estimates by

the United States Department of Commerce. The fastest growing mineral products were coal, gypsum, copper and lead. The market for mining equipment is expected to grow 9 percent per year for the next three years. By these estimates, demand for imported machinery and equipment should grow by an average of 12 percent per year during the next three years.

During the first three quarters of 1995, the real value of mineral production in Mexico rose by almost 10 percent, compared with the same period a year earlier. Precious metal production increased by 19 percent. Non-metallic minerals and those related to the steel industry were up by 13.4 percent and 7.4 percent, respectively.

In January 1995, President Zedillo announced a new mining development program called the *Plan*

Sexenal de Inversión de la Industria Minera Nacional, Six Year Plan for Investment in the Mexican Mining Industry. The objective of the plan is to promote private investment of at least US \$5 billion over the next several years. This plan promises to stimulate investment by reducing regulation even further, and by accelerating land reforms.

FOREIGN TRADE

There are no reliable statistics regarding Mexican imports of mining equipment and services. The harmonized system (HS) of commodity classifications used for international trade data does not separate most mining equipment from similar products used in other industries. Moreover, trade data excludes services. Canada's exports of mining

Mexico's Rank in World Mineral Production, 1994

Rank	Product	Percentage of World Production
First	Celestite*	29.8
	Silver	15.8
Second	Bismuth**	33.3
	Cadmium	13.0
	Fluorite	8.5
Third	Antimony	2.5
Fourth	Arsenic	9.4
Fifth	Lead	5.8
	Graphite	4.2
Sixth	Zinc	5.7
Seventh	Molybdenum	2.4
Eighth	Salt	3.9
Ninth	Manganese	1.3
Tenth	Gypsum	3.2
	Sulphur***	1.7

* Not including the former USSR. The volume of celestite is expressed with a 43.88 percent strontium content

** Not including American production

*** Including all forms of sulphur

Source: *Cámara Minera de México (CAMIMEX)*, Mexican Mining Chamber.

technology are heavily weighted towards consulting and other services.

The United States Department of Commerce has produced estimates based on HS categories that include the major types of mining equipment. According to this data, Mexico's imports of mining-type equipment increased by 16 percent to reach US \$135 million in 1993. Imports for 1994 were projected to increase by 12 percent and this pace of growth was expected to continue for the medium term. The United States claimed 62 percent of the market for these products in 1993. Canada had a 4 percent import market share in 1993.

PRECIOUS METALS

Gold

The gold deposits that Canadians and Americans have long exploited throughout the Rocky Mountains extend southward into Mexico's Sierra Madre. But since the development of Mexico's resources have been held back by government policies, they remain relatively unexploited. The same policies that encouraged domestic ownership also restricted imports of modern technology. The new mining law has changed this situation. In 1994, gold production rose by 32 percent to reach 14.6 tonnes.

Silver

Mexico is the world's leading producer of silver, accounting for about 16 percent of global production. Output in 1994 was 2,334 tonnes, a 3.4 percent decline from the year before. A large proportion of silver production is exported. The U.S. is the main export market, receiving some 60 percent of Mexico's silver exports over the last five years. Japan is also a major customer.

NON-FERROUS METALS

Copper

Mexico's copper production increased slightly in 1994 to reach 305,487 tonnes, which was more than 3 percent of total world production. Mexico's raw copper production has shown an annual average increase of 3.6 percent over the past decade. Capacity has been increased to meet growing demand from Mexico's export-oriented industries, particularly the *maquiladora*, or in-bond companies.

Zinc

Mexico is the world's sixth largest zinc producer. Production in 1994 totalled 358,953 tonnes which was almost 6 percent of world production of newly-mined zinc. Approximately half of Mexico's zinc production is exported to the United States, Japan and Belgium in the form of either zinc metal or zinc concentrates.

Lead

Mexico is a major supplier of lead to the world market and ranks seventh amongst world producers. Production volume was 163,836 tonnes in 1994, a drop of about 10 percent from the year before. The industry exports more than 60 percent of lead production, of which approximately one-third goes to the United States, and the remainder to Belgium, Italy, Japan, Spain and the countries of the former Soviet Union.

NON-METALLIC MINERALS

Traditionally Mexico's mineral production was concentrated in metallic minerals such as silver, copper, lead and zinc. As the industry has developed, several important non-metals have been exploited. Nonetheless, non-ferrous metals still account for more than 46 percent of Mexico's mineral production by value, while non-metals make up only about 12 percent.

Production of non-metallic minerals continues to grow as both domestic and international demand increase. Many of the non-metallic minerals produced in the country are used in the manufacturing industry, which is currently experiencing an export boom. The growth of this sector has also been bolstered by extensive reserves, the relatively small investment required, and the labour-intensive nature of this type of mining.

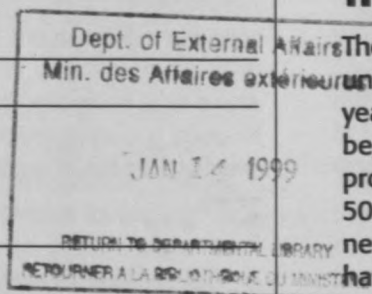
MINERALS RELATED TO THE STEEL INDUSTRY

The Mexican steel industry has undergone drastic changes in recent years. In 1982, the government began to relax its control over steel production by privatizing more than 50 steel production facilities. The newly-privatized steel companies have modernized and increased

Mining Industry Equipment Market
US \$ millions

	1991	1992	1993
Import market	98.3	116.1	134.0
Local production	89.6	85.3	86.4
Exports	4.7	6.2	8.4
Total market	192.6	207.6	228.8

Source: United States Department of Commerce.



efficiency. Production increased by 11 percent in 1994 to reach 10.2 million tonnes.

Iron ore production was 5.5 million tonnes in 1994. Four companies dominate iron mining in Mexico. They include *Grupo Acero del Norte*, *HYSLA*, *Siderúrgica Lázaro Cárdenas* and *Peña Colorada*. The *Peña Colorada* mine alone produces more than one-third of Mexico's iron ore.

The principal producers of metallurgical coal in Mexico are *Grupo Acerero del Norte*, *Grupo Industrial Minera México* and *Siderúrgica Lázaro Cárdenas*. *Minera Carbonífera Río Escondido (MICARE)* is the largest producer of thermal coal. Total coal production increased by 12 percent in 1994 to reach 6.4 million tonnes. Coke production increased slightly to just under 2 million tonnes.

Mexico ranks eighth worldwide in manganese production and is one of two nations in the western hemisphere with major deposits of this mineral. The country's proven reserves are about 10 million tonnes. Production in 1994 was 91,272 tonnes, a 21 percent reduction from the year before.

CUSTOMERS

Private mining companies have gradually replaced government-owned enterprises as the most important customers for mining equipment and services. The Government of Mexico has now sold virtually all of its holdings in the mining and metalworking sector to private sector operators.

In early 1994, there were a total of 15,000 mines in Mexico operated by 800 companies. The bulk of mining activity is controlled by a small number of corporate groups. The number of mining companies in the *Expansión 500* list of Mexico's largest companies grew from 7 in 1994 to 12 in 1995.

New Mining Investments, 1995 US \$ millions

Grupo Industrial Minera México	283.10
Grupo Real del Monte	156.20
Grupo Peñoles	128.00
Empresas Frisco	35.00
Exploraciones El Dorado	29.42
Materias Primas Monterrey	11.66
Cía. Exportadora de Sal	11.30
Industrias Luismin	9.50
Minas de Bacis	7.80
Cía. Minera de Sabinas	5.00
Flourita de México	4.35
Cía. Minera del Cubo	4.06
Consortia. Minera. Benito Juárez-Peña Colorada	4.00
Neg. Mrs. Sta. Ma. de la Paz y Anexas	3.95
Materiales Industrializados	3.79
Las Encinas	3.55
Minera Heda	2.90
Minera Tayahua	2.75
Minera Autlán	2.72
Cía. Minera Mexicana de Avino	2.60
Macocozac	2.59
Cía. Minera Caopas	2.50
Cía. Minera las Cuevas	2.32
Baramin	2.01
Cía. Minera Constelación	2.00
Total	723.07

Source: *Cámara Minera de México (CMM)*, Mexican Mining Chamber.

The Canadian mining companies that are moving into Mexico represent a considerable market opportunity because they are familiar with Canadian-made equipment.

COMPETITION

The modernization of the Mexican mining sector has caused a steady increase in import penetration in the equipment market. According to estimates by the United States Department of Commerce, import penetration for mining equipment rose from 53 percent in 1991 to more than 63 percent in 1993. The import share was projected to increase, with imports growing faster than domestic production for at least the next three years.

There are about 20 manufacturers of mining machinery and equipment in Mexico. In 1993 they produced more than US \$86 million worth of equipment, of which US \$8.4 million worth was exported. Domestic production is limited to light and technologically less sophisticated equipment and parts. Firms from the United States are the most important competitors for more advanced equipment.

Mining companies from all over the world are presently evaluating investments in the mining sector. Many of them are expected to import mining equipment from their own countries. The very active participation of Canadian mining companies in Mexico may be a competitive advantage for Canadian equipment suppliers.

TRENDS AND OPPORTUNITIES

The most important trend driving the market for mining equipment has been the rapid privatization and deregulation of the industry. All but one of the formerly state-owned mining companies have been sold to the private sector.

The newly privatized mining companies have invested heavily to modernize their operations and to expand. According to statistics published by the *Cámara Minera de México (CAMIMEX)*, Mexican Mining Chamber, its member companies will invest US \$723 million in 1995 alone, and this level of investment is expected to continue for several years.

The release of millions of hectares of mining reserves previously held for the exclusive use of government-owned mining companies is also driving new investment in the industry. The largest source of new investment is the United States, followed by Canada.

Opportunities in Remote Sensing

The *Consejo de Recursos Minerales (CRM)*, Mineral Resources Council, has a mandate to conduct the geological survey of Mexico. But so far the CRM's activities have mainly involved cataloguing mining concessions. Mexico does not have a comprehensive inventory of its mineral resources. The government has estimated that no more than one-fifth of the nation's territory has been systematically explored. Given the sheer size of the unexplored territory, there is considerable potential for multi-spectral scanning and other remote sensing technologies.

Product Opportunities

Mining company buyers interviewed for this study were asked to identify mining equipment with particular potential for foreign suppliers. The products they mentioned as being primarily imported included the following:

- scooptrams
- payloaders
- locomotives
- stationary and portable compressors
- perforadoras de piedra or montados sobre orugas, caterpillar mountings
- diamond perforating equipment
- contrapoceras, counter well drillers
- pumps
- molinos de bolsa y/o martillo, ball mills
- flotation cells
- classifiers
- reactive feeders
- laboratory equipment, especially scales, stoves, crisoles, melting pots, spectrophotometers

Most of the mining company officials believed that Canada was a potential source of all of this equipment.

Consulting Opportunities

The majority of mining operators interviewed for this summary said that they had used foreign consulting firms, including several from Canada. While foreign firms are regarded as more costly, they also have a much better reputation for technical expertise than do Mexican firms. Those interviewed mentioned exploration, research, equipment setup, environmental control and advice on innovative production techniques as areas where they sought foreign help.

THE REGULATORY ENVIRONMENT

In early 1995, the new government of Ernesto Zedillo announced that the *Secretaría de Energía, Minas e Industria Paraestatal (SEMIP)*, Secretariat of Energy, Mines and State-owned Industries, would be dismantled. Mining is now part of the mandate of *Secretaría de Comercio y Fomento Industrial (SECOFI)*, Secretariat of Commerce and Industrial Development. SECOFI has set up a new mining division to handle this responsibility.

Mining Law

The Mexican constitution assigns ownership of all subsoil mineral resources to the public. This has been reinterpreted over the years by a series of mining laws. Mexico's current mining law came into force in September 1992, and it was followed by new mining regulations in early 1993. The new law creates a much larger role for the private sector. It allows direct private investment, with up to 100 percent ownership, in all mining activities including exploration. It also provides greater security for holders of exploration

and exploitation concessions. The list of strategic minerals reserved for the state has been drastically cut, although oil and gas remain exclusively in the hands of *Petróleos Mexicanos (PEMEX)*, the national oil company.

The new law substantially liberalized the rules for granting mineral concessions. Any company can approach the government with a petition to explore or exploit mineral resources. If there are no competing petitions, concessions are awarded on a first-come, first-served basis. Otherwise, they go out to tender.

Foreign Investment Law

The changes to the mining law have been reinforced by a new law to promote Mexican investment and to regulate foreign investment. This law specifies that foreign individuals and corporations can hold up to 49 percent of operations engaged in the exploitation and use of ordinary concessions and 34 percent of special concessions for the exploitation of national mining reserves. But other provisions of the mining law allow up to 100 percent foreign ownership for an initial 12-year period.

MARKET ENTRY STRATEGIES

Traditionally, imported mining equipment has been distributed in Mexico through local agents or representatives. Some large mining companies prefer to buy directly from foreign manufacturers. Buyers say that this is the best way to ensure that service requirements are met, especially where used equipment is involved. Some major equipment suppliers maintain permanent sales facilities in Mexico, and have equipment on display.

Some suppliers advertise in business magazines and industry trade journals. The major publications are listed at

the end of this profile. Although many buyers speak English, they may not fully understand technical specifications. Consequently, all printed materials, including brochures and specification sheets, should be prepared in Spanish. Videotapes are also a common tool for demonstrating equipment that cannot be displayed in Mexico.

Companies using Mexican agents usually arrange for the agent to visit Canada to become thoroughly familiar with the company's offerings and service capabilities. Especially for the more technical products, providing solid technical support for the agent is an essential success factor. In the current market, Canadian companies that can provide attractive credit terms will have the best chance of success.

KEY CONTACTS

CANADA

Canadian Government

Department of Foreign Affairs and International Trade (DFAIT)

DFAIT is the Canadian federal government department most directly responsible for trade development. The **InfoCentre** should be the first contact point for advice on how to start exporting. It provides information on export-related programs and services, acts as an entry point to DFAIT's trade information network, and can provide copies of specialized export publications and market information to interested companies.

InfoCentre

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

Fax: (613) 996-9709

FaxLink: (613) 944-4500

InfoCentre Bulletin Board (IBB):

Tel.: 1-800-628-1581 or
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Internet:

<http://www.dfait-maeci.gc.ca>

The Trade and Economic Division of the Embassy of Canada 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 measures possible to support a Canadian firm's presence in Mexico.

Note: to telephone Mexico City, dial: 011-52-5 before the number shown. 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.

Trade and Economic Division

The Embassy of Canada in Mexico
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Canadian Consulate

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

Canadian Consulate

Hotel Fiesta Americana
Local 30-A
Aurelio Aceves No. 225
Col. Vallarta Poniente
44110 Guadalajara, Jalisco
México
Tel.: 616-6215
Fax: 615-8665

International Trade Centres have been established across the country as a convenient point of contact to support the exporting efforts of Canadian firms. 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 market

research and planning, provide access to government programs designed to promote exports, and arrange for assistance from the trade commissioners in Ottawa and trade officers abroad. Contact the International Trade Centre nearest you.

World Information Network for Exports (WIN Exports)

is a computer-based information system designed by DFAIT to help Canada's trade development officers abroad match foreign needs to Canadian capabilities. It provides users with information on the capabilities, experience and interests of more than 23,000 Canadian exporters. To register on WIN Exports, call (613) 996-5701, or fax 1-800-667-3802 or (613) 944-1078.

International financing institutions, including the World Bank and the Inter-American Development Bank, provide funds to Mexico for a wide variety of specific projects. DFAIT helps Canadian exporters interested in pursuing multilateral business opportunities that are financed by international financing institutions. For further information, call (613) 995-7251, or fax (613) 943-1100.

Market Intelligence Service (MIS)

provides Canadian businesses with detailed market information on a product-specific basis. The service assists Canadian companies in the exploitation of domestic, export, technology transfer and new manufacturing investment opportunities. MIS is offered free of charge by fax, letter or telephone. For more information, call (613) 954-5031, or fax (613) 954-2340.

Department of Industry

Metal and Mineral Processing Branch

Department of Industry
235 Queen Street
Ninth Floor, East Tower
Ottawa, ON K1A 0H5
Tel.: (613) 954-3135
Fax: (613) 954-3079

Canadian International Development Agency (CIDA)

CIDA is an important possible source of financing for Canadian ventures in Mexico. A special fund is available through the CIDA under the Industrial Cooperation Program (CIDA/INC). This 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. For more information, call (819) 997-7905/7906, or fax (819) 953-5024.

Export Development Corporation (EDC)

EDC is a customer-driven, financial services corporation dedicated to helping Canadian businesses succeed in the global marketplace. EDC provides a wide range of risk management services, including insurance, financing and guarantees to Canadian exporters and their customers around the world.

EDC has established relationships with leading commercial and public sector institutions in Mexico and Latin America. Exporters can call (613) 598-2860 for more information. Smaller exporters, with annual export sales under C \$1 million, should call the Emerging Exporter Team at 1-800-850-9626. Exporters in the information technology industry can call EDC's Information Technologies Team at (613) 598-6891. For information on the full range of EDC services, call (613) 598-2500, or fax (613) 237-2690.

Revenue Canada

Revenue Canada, Customs Program Branch provides a NAFTA Help Desk telephone line with service available in Spanish. For information, call (613) 941-0965.

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Business and Professional Associations

Mining Equipment Manufacturers Association of Canada (MEMAC)

116 Albert Street
Suite 701
Ottawa, ON K1P 5G3
Tel.: (613) 232-7213
Fax: (613) 232-7381

Canadian Association of Mining Equipment and Services for Export (CAMESE)

345 Renfrew Drive
Suite 101
Markham, ON L3R 9S9
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Canadian Council for the Americas Executive Offices

360 Bay Street
Suite 300
Toronto, ON M5H 2V6
Tel.: (416) 367-4313
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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
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The Canadian Chamber of Commerce

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Forum for International Trade and Training Inc.

155 Queen Street
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Language Information Centre

240 Sparks Street RPO
Box 55011
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Tel.: (613) 523-3510

Open Bidding Service

P.O. Box 22011
Ottawa, ON K1V 0W2
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Canadian Standards Association

178 Rexdale Blvd.
Rexdale, ON M9W 1R3
Tel.: (416) 747-4000
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Standards Council of Canada

45 O'Connor Street
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Tel.: (613) 238-3222
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Mexican Embassy in Canada

Embassy of Mexico

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MEXICO

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Sub-Secretaría de Promoción de la Industria y el Comercio Exterior

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Secretaría de Comercio y Fomento Industrial (SECOFI)

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National Oil Company

Petróleos Mexicanos (PEMEX)

Av. Marina Nacional No. 329

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11311 México, D.F.

México

Tel.: 725-2200, 250-2611

Fax: 625-4385

Houston Purchasing Offices

Petróleos Mexicanos (PEMEX)

3600 South Gessner, Suite 100

Houston, TX 77065

U.S.A.

Tel.: (713) 978-6269

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Secretariat of Energy

Secretaría de Energía (SE)

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Secretaría del Medio Ambiente,

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Business and Professional Associations

Mexican Investment Board

Consejo Mexicano de Inversión (CMI)

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Confederation of Industrial Chambers

Confederación de Cámaras Industriales (CONCAMIN)

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Mexican Confederation of National Chambers of Commerce

Confederación de Cámaras Nacionales de Comercio

(CONCANACO)

Balderas No. 144, Piso 3

Col. Centro

06079 México, D.F.

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Fax: 709-1152

Mexican Mining Chamber

Cámara Minera de México

(CAMIMEX)

Sierra Vertientes No. 369

Col. Lomas de Chapultepec

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México

Tel.: 540-6788/6380

Fax: 540-6061

Mexican Copper Association

Asociación Mexicana del Cobre

(AMECOBRE)

Sonora No. 166, Piso 1

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06100 México, D.F.

México

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Fax: 286-7723

National Cement Chamber

Cámara Nacional del Cemento

(CANACEM)

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11590 México, D.F.

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Association of Mining Engineers, Metallurgists and Geologists of Mexico

Asociación de Ingenieros de Minas, Metalurgistas y Geólogos de México

(AIMMGM)

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National Chamber of Manufacturing Industry
Cámara Nacional de la Industria de Transformación (CANACINTRA)
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Col. Ampliación Nápoles
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Cámara de Comercio de Canadá en México
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