

# Plastics and Advanced Materials



## THE OPPORTUNITY

The plastics industry is one of Mexico's most dynamic sectors. It is simultaneously modernizing and expanding.

- Although the devaluation of the peso has temporarily curtailed growth, the industry has consistently outperformed the overall economy.
- Per capita consumption of plastics is rising rapidly, but is still only about one-quarter of the Canadian level, suggesting long-term growth prospects.
- Liberalized trade and increased international competition are forcing Mexican plastics manufacturers to modernize, mostly using imported technology.
- Mexico is self-sufficient in a number of basic raw materials, but there is a high demand for some resins. About 30 percent of all resins are imported.

For these reasons, the Mexican plastics sector offers important opportunities for Canadian suppliers of plastics products as well as resins and other inputs.

## AN UNDERDEVELOPED MARKET

Plastics is one of Mexico's most dynamic industries. For more than a decade, its growth has consistently outperformed the gross domestic product (GDP). Plastics consumption per capita rose steadily from 6 kilograms in 1980 to 26 kilograms in 1994. But this is still far below the 90 kilograms per capita in Canada and the United States. This

suggests sustained market growth, as Mexico gradually catches up with the rest of North America in substituting plastics for traditional materials.

For decades, Mexico's plastics industry developed under an umbrella of protectionism and policies of self-sufficiency. The industry benefitted from a reliable supply of secondary petrochemicals from *Petróleos Mexicanos (PEMEX)*, the national oil company, at regulated prices. While this fostered the growth of the domestic industry, it also discouraged innovation and sheltered shoddy quality standards. When the Mexican government liberalized the nation's trade policies in the late 1980s, the industry reacted quickly with massive spending on new technology as it tried to protect its market share.

Sustained growth and pressure from competitors have forced the plastics industry to rely heavily on imports. Between 1990 and 1994, imports of raw materials increased by 63 percent and import penetration for resins now stands at about 32 percent of the market by volume. Imports of finished and semi-finished plastic products were almost US \$3 billion in 1994.

## 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: Plastics and Advanced Materials**. This market information on the Mexican plastics and advanced materials 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:

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Under the North American Free Trade Agreement (NAFTA), trade barriers will continue to fall, and competition will force further modernization. The result will be long-run opportunities for Canadian suppliers of plastics products, materials and technology.

As in most other sectors, the key to entering the Mexican plastics market is to establish a permanent local presence. Many Canadian companies have found that partnerships or joint ventures with Mexican firms are a good way to accomplish this. Canadian firms that can bring capital as well as know-how to a partnership will find themselves increasingly welcome.

## OVERVIEW OF THE PLASTICS SECTOR

The Mexican plastics industry is made up of about 2,800 plastics processing companies. In addition, there are an estimated 350 firms engaged in activities related to plastics. The industry is concentrated in the Mexico City area as well as in the states of Jalisco, Guanajuato, and Nuevo León.

### Corporate Structure

Large, high-technology firms coexist with small, family-owned businesses. Three-quarters of the firms have

### Principal Activities of Registered Plastics Companies, 1994

Products	percentage
Film and bags	14.5
Clean plastic packaging	11.8
Household goods	9.1
Moulded parts and packaging	8.2
Footwear	7.8
Toys	6.3
Building plastics	5.7
Decorative laminates	5.3
PVC products	5.1
Shapes and tubes	4.9
Other products	21.3

Source: *Asociación Nacional de las Industrias del Plástico (ANIPAC)*, National Association of the Plastics Industry.

fewer than 100 employees, and half of them have less than 20. Two hundred large firms employ 40 percent of the industry's workers. Large multinational firms are increasing their dominance of the industry as family firms have struggled to cope with economic restructuring and the economic crisis caused by the devaluation of the peso in December 1994. The ability of large firms to export and maintain hard-currency earnings has been a major advantage in weathering this crisis.

Many Mexican-owned companies are seeking partnerships or joint ventures with foreign firms to improve their

competitiveness. They seek technical assistance and capital, and in exchange they offer access to the local market.

### Production Techniques

Injection and extrusion moulding are the most widely-used production techniques, because of their versatility. Blowing is becoming increasingly common, as advanced packaging products become more popular.

The industry has been forced to modernize in the face of foreign competition. Imports of plastics production machinery more than doubled to US \$232 million between 1990 and 1994 according to data from the *Asociación Nacional de las Industrias del Plástico (ANIPAC)*, National Association of the Plastics Industry.

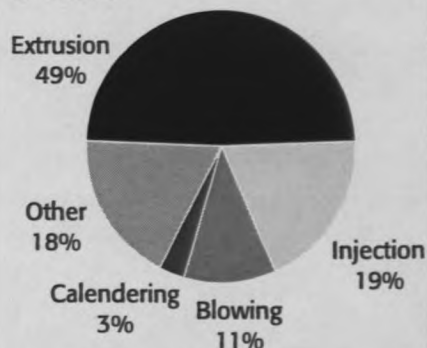
The most commonly used resins are low-density polyethylene (LDPE), high-density polyethylene (HDPE) and polyvinyl chloride (PVC), followed by polystyrene, unsaturated polyester and polypropylene. Producers are gradually switching to new materials. Sales of the traditional commodity resins (LDPE, HDPE, PVC, polypropylene and polystyrene) have increased by only 3 percent per annum in the past few years, and thermofixed resins have fallen by 20 percent. The most dynamic products are the new

### Modernization of the Plastics Sector Machinery Imports

	US \$ millions		
	1990	1992	1994
Injection moulding machinery	31.1	48.8	97.1
Extruders	17.8	25.6	29.1
Blow moulding machinery	24.6	36.7	55.9
Vacuum forming machinery	12.1	15.8	29.4
Auxiliary equipment	6.8	14.5	20.7
<b>Total</b>	<b>92.4</b>	<b>141.4</b>	<b>232.2</b>

Source: 1995 annual report of the *Asociación Nacional de las Industrias del Plástico (ANIPAC)*, National Association of the Plastics Industry.

### Plastic Production Methods in Mexico



Source: Caroline Vêrut, *The Market for Plastics Product Machinery, Equipment and Materials*. Mexico City: Canadian Embassy, 1993.

plastic resins, versatile resins, technical plastics, engineering resins and specialty products.

### The National Oil Company

In 1938, the Mexican government expropriated the private oil companies and established *Petróleos Mexicanos (PEMEX)*, the national oil company, to consolidate the industry under exclusive government control.

The national pride attached to *PEMEX* is a powerful force preventing the administration of President Zedillo from privatizing parts of the energy sector. So far, the government has announced that 61 *PEMEX* petrochemical plants will be sold and that transmission, distribution and storage of natural gas will also be privatized. But to calm opposition, President Zedillo has assured the nation that *PEMEX* will continue to control the exploration, extraction and processing of oil and gas reserves, as well as the production of basic petrochemicals.

The petrochemicals, produced by the *PEMEX Gas y Petroquímica Básica*, Gas and Basic Petrochemicals division, are considered part of the petroleum industry. *PEMEX* will retain its constitutional monopoly over "basic" petrochemical products. But the scope of the monopoly has gradually been relaxed.

The *PEMEX Petroquímica*, Petrochemical division, is responsible for the production of petrochemical products that are not considered

part of the basic petroleum industry. It was created specifically to handle the products that are open to private competition.

*PEMEX* announced its intention to begin to withdraw from the secondary petrochemicals business in early 1993. Officials said it would close some plants and privatize others. This process was delayed because of low world prices for petrochemicals.

Privatization will be carried out under the supervision of the *PEMEX Comisión Intersecretarial de Desincorporación*, Intersecretarial Commission for Privatization. The first tenders, for the *Cosoleacaque* plant, will begin in October 1995.

from 100 percent to 20 percent, and a system of import permits for high technology goods was scrapped.

For the plastics industry, the results were dramatic. Imports flooded the market, forcing producers to simultaneously increase efficiency and improve quality. Raw material producers could not keep up with the demand, particularly for advanced materials, and many manufacturers of plastics products were forced to import primary materials.

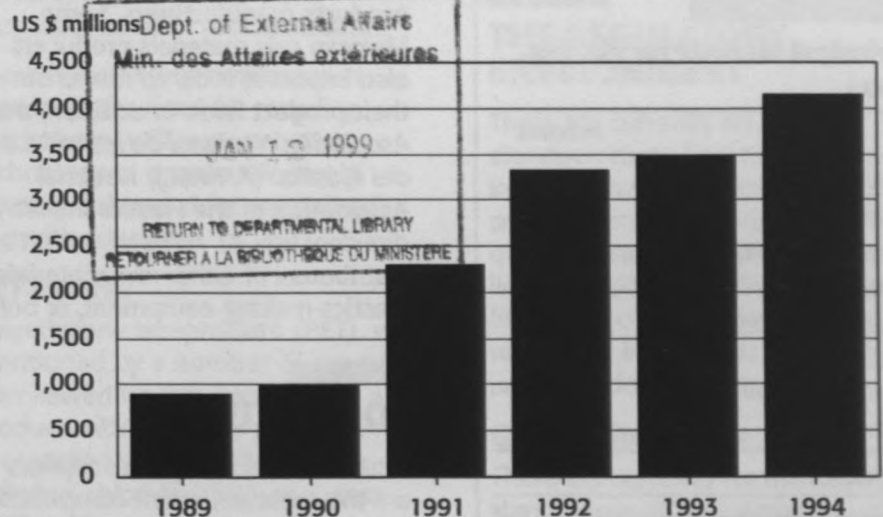
The largest increases were for finished and semi-finished plastics products, which grew eight-fold over the five years ending in 1994 to reach almost US \$3 billion. Resins and other primary materials increased from US \$541 million in 1989 to almost US \$1.2 billion in 1994, a 218 percent increase.

The United States dominates Mexico's import markets for both finished products and raw materials. In 1994, the American market share was about 87 percent for both categories. Canadian sales have traditionally been small. Exports have grown rapidly over the past few years, but at less than US \$40 million

## THE ROLE OF IMPORTS

Until recently, Mexico has not been a major importer of plastics products or raw materials. The situation changed abruptly in 1988 when the Mexican government unilaterally liberalized trade. The nation became a full member of the General Agreement on Tariffs and Trade (GATT), the maximum tariff was chopped

**Mexican Imports of Plastics Products from the World**



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

### Petrochemicals Classified as "Basic" under Mexican Law

Butane	Ethane
Heptane	Hexane
Naphthas	Penatanes
Propane	Raw materials for carbon black

Source: *Petróleos Mexicanos (PEMEX)*, the national oil company.

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in 1994, they remain small in absolute terms.

In the finished and semi-finished category, the most important product group was plates, sheets, film, foil, tape and strip, which are represented in the Harmonized System (HS) categories 3919 and 1920. Packing and packaging material is another major export, although sales have fallen slightly over the past few years. Sales of fully finished products such as kitchenware have been growing, although they remain small in absolute terms. Canada's import market share in 1994 was about 1 percent for primary materials and slightly less than that for finished and semi-finished products.

## CUSTOMERS

The largest users of finished and semi-finished plastics products are the food and beverage industry and the automotive industry. The construction sector has traditionally been a major user of plastics but it is presently in a serious slump as a result of the devaluation of the peso in December 1994. The cosmetics and toiletries industry is also an important, growing user of plastic packaging.

### Principal Markets for Plastics, 1994

	Percent
Packaging	42.3
Construction	22.9
Home and office products	7.9
Automotive	5.0
Clothing and footwear	4.5
Electrical and electronic products	3.3
Other	14.1
<b>Total</b>	<b>100</b>

Source: *Asociación Nacional de las Industrias del Plástico (ANIPAC)*, National Association of the Plastics Industry.

The vast majority of plastics products exported to Mexico by Canadian suppliers are raw materials or intermediate goods sold to Mexican producers for incorporation into finished products. Some finished products such as floor coverings and bathroom fixtures are sold to industrial customers. A small but growing group of products are consumer goods that are distributed by retailers.

The Mexican retail sector is highly diverse. On one hand, it has a very large number of small retail outlets often referred to as "mom and pop" stores. On the other hand, the market is dominated by very large retail supermarkets. Major supermarkets make up only about 5 percent of retail outlets, but account for 40 percent of sales. Experts predict that the market share of supermarkets and other retail chains will expand to about 70 percent over the next several years.

Wholesalers handle some of these products, but increasingly, large retail chains are buying directly from foreign suppliers. Mexican supermarkets typically devote less than one-third of their space to food products.

The main customers for resins and primary materials are plastics products manufacturers. Some Mexican raw materials producers also import in order to round out their product lines. In addition, the *Asociación Nacional de las Industrias del Plástico (ANIPAC)*, National Association of the Plastics Industry, directory lists 41 companies that are distributors of either raw materials or plastics-making equipment, or both.

## COMPETITION

American and European suppliers are the most important competition for Canada in Mexican plastics markets. Mexican manufacturers of finished and semi-finished plastics

products are able to supply the market for lower-end products, but the nation relies on imports for more sophisticated ones. Similarly, in the case of resins, Mexico has a large production capability in the traditional commodity resins, but is dependent on imports for the newer and more sophisticated products.

Domestic producers of resins and materials have responded to the increased demand with new production capacity. For example, there was no polypropylene produced in Mexico until 1991, when *Petróleos Mexicanos (PEMEX)*, the national oil company, began production. And Shell is building two new polyethylene terephthalate (PET) plants that are expected to come on stream in 1998.

The United States is by far the most important supplier of plastics products, enjoying an 87 percent import market share in 1994.

Germany, Brazil and France are the other significant competitors. Canada supplied about 1 percent of the import market in that year.

Canadian firms are not well-known in the plastics market. Industry participants interviewed for this profile mentioned NOVACOR as an important supplier of catalysts, anti-rust treatments and ultraviolet blocking additives. Big 'O was mentioned as having made a brief and unsuccessful appearance in the Mexican market.

## PRODUCT TRENDS AND OPPORTUNITIES

The economic crisis has taken its toll among the smaller producers and distributors of plastics products and equipment. Domestic production has been cut back in response to reduced demand from the construction, automotive and home products industries that have been hurt directly by the devaluation of December

1994. In the first half of 1995, for example, construction activity was down by 70 percent and automotive sales had shrunk by 40 percent compared to the same period in 1994. Imports of resins were maintained until September 1995 because of international demand for the products of the Mexican plastics industry. Sales were projected to drop in the last quarter.

Some mid-sized firms that modernized during 1994 were caught with large dollar debts when the peso was devalued. Many of them have gone out of business or have been acquired by larger firms.

The firms that are weathering the crisis are mainly those which export. The average export level among the larger companies is 30 percent. Most of these companies have access to foreign financial markets, and have been able to maintain their equipment and achieve economies of scale.

### **Resins**

Engineering resins, usually produced in low volume and at higher cost than commodity resins, are particularly sought after in Mexico. These are currently imported because their sales volumes are too low to justify the technologically-advanced production processes involved. Engineering resins used in Mexico include ABS, polyethylene terephthalate (PET), polycarbonate, polyacetal resins, nylon, fluoropolymers, polyamide, polyesters, polyurethanes, epoxy resins, unsaturated polyester, alloys and blends.

Additives for plastics are also an important market opportunity. Mexico relies entirely on imports and foreign suppliers of these products have not marketed their products aggressively.

According to estimates published by the *Secretaría de Comercio y Fomento Industrial (SECOFI)*, Secretariat of Commerce and Industrial Development, about two-thirds of current demand is for four types of resins:

polyvinyl chloride (PVC), low- and high-density polyethylene, polypropylene and polystyrene.

Of these, only PVC is in growing demand according to this source. *SECOFI* also notes that urea-formaldehyde resins, polyvinyl acetate emulsions and bottle-type PET are in strong demand as of early 1995. Another product with good long-run potential are resins used in the production of non-toxic and microwavable plastic food containers. The general advice offered to Canadians by industry experts in Mexico is to focus on niche markets with innovative products that rely on specialized technologies.

### **Services**

The modernization boom of the past five years has been substantially curtailed by the devaluation of the peso. Training is one of the services in demand as a result of this trend. Training designed to help workers use equipment more efficiently is needed, as well as training for repair technicians.

The privatization of 61 plants owned by *Petróleos Mexicanos (PEMEX)*, the national oil company, which is now underway, should create the need for administrative and financial consultants. The plants are in desperate need of modernization.

There is increasing awareness in Mexico of the need for recycling. The industry will require better technology to recycle effectively, creating a demand for specialized consulting services.

### **PET Bottles**

Polyethylene terephthalate (PET), was mentioned by a number of experts interviewed for this summary, as a product with particular potential. PET is expected to gradually displace polyvinyl chloride (PVC) and glass bottles. Its use is projected to rise dramatically in the edible oil, water and soft-drink sectors.

Currently, Eastman holds 44 percent of the market share, followed by HCC with 26 percent. Both companies have ambitious plans to extend their production capabilities. Shell is planning to open two PET plants by 1998. However, since exports to Mexico are still forecast, it is not anticipated that the country will have excess supplies in the foreseeable future.

### **Do-It-Yourself Home Improvement Products**

The do-it-yourself (DIY) culture has yet to take root in Mexico, as it has in Canada and the United States. Skilled labour is relatively cheap and most Mexicans lack the skills to do home projects on their own.

Retailers believe that the market for DIY products has a promising future, although it may take 10 years to develop. The economic crisis has forced more consumers to consider doing their own home repairs and renovations. Mexican consumers are impressed with the large array of DIY products, and tend to be lured by the convenience of having many products under one roof. Visiting the store provides what is often the only opportunity to learn about new products, including many that are made from plastics.

## **THE REGULATORY ENVIRONMENT**

There are currently no official standards that affect the plastics industry. The larger Mexican producers are attempting to develop voluntary quality standards within the guidelines of federal law. There is also the likelihood of future government regulation in the areas of recycling and hazardous wastes.

### **Quality Standards**

There are currently no mandatory standards in effect for plastics, but the *Ley Federal de Normalización*, Federal Law of Standardization, of 1992 puts the onus on designated

industries, including plastics, for the development and enforcement of their own quality and operating standards. The plastics industry is now attempting to develop appropriate policies. Some of the larger companies, such as *Duroplast*, already comply with ISO 9000 and 9002 standards. But the industry has its own unique problems. For one thing, raw materials, especially those manufactured by *Petróleos Mexicanos (PEMEX)*, the national oil company, tend to fluctuate in quality from lot to lot and machinery must be able to cope with these changes.

To implement the legal requirements for voluntary industry standards, the *Comisión Nacional para la Calidad del Plástico (CNCP)*, National Commission for Plastics Quality, was created in early 1995. Its objectives are to develop certification, verification and technical training programs throughout the industry.

### **Waste Products**

According to government sources, a new regulation will be established during 1995 to govern the discharge of effluents created in the manufacture of synthetic resins. The water subcommittee of the *Comité Consultivo Nacional de Normalización para la Protección Ambiental*, National Advisory Committee on Standardization of the Environment, has been working with *Petróleos Mexicanos (PEMEX)*, the national oil company; the *Secretaría de Energía (SE)*, Secretariat of Energy; as well as the *Secretaría del Medio Ambiente, Recursos Naturales y Pesca (SEMARNAP)*, Secretariat of Environment, Natural Resources and Fisheries on this project. The new standard will establish limits for pollutants to be discharged into water by the synthetic resin industry.

### **Recycling**

In Mexico, recycling is supposed to be encouraged and promoted through the use of government

procurement policies. Observers are skeptical, however, that these policies are actually followed to any extent. One recycling industry executive complained that instead of providing support, several government institutions actually discourage recycling by imposing regulations oriented towards hygiene and disposal.

Recycling in the private sector has been impeded by a lack of consumer awareness. And mid- to upper-class stores have been reluctant to carry recycled products because their customers object to the variations in colour that are sometimes produced.

## **MARKET ENTRY STRATEGIES**

Canadian companies that have succeeded in Mexico almost always stress the need for personal contact. Mexicans like to do business with people they know, and a long-term local presence is usually essential. Partnering is an effective way to achieve this. This may be accomplished through an agent, a distributor, a joint venture or some other form of strategic alliance.

### **Distribution**

Distribution patterns tend to follow those used by *Petróleos Mexicanos (PEMEX)*, the national oil company, which will usually deliver to the clients' plant via rail. Private producers are usually close to *PEMEX* plants and tend to use the same rail systems for delivery. Trucks are rarely used. Imports from or via the United States tend to be shipped by rail through Laredo or by sea to Veracruz.

New distribution networks will soon be developed now that *PEMEX* no longer has a monopoly on the distribution of secondary petrochemicals. Many of those interviewed commented that this was a very positive development, because *PEMEX* is notorious for unreliable service.

### **Trade Shows**

Many Canadian companies have first approached the Mexican market by participating in trade shows to exhibit their products and make contact with potential partners. Annual trade shows of interest to Canadian plastics producers include *Mexiplast*, in the fall and *Plastimagen* in the spring. The last *Plastimagen* was held March 12 to 15, 1996.

## **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.

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**Commercial 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.

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**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.

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**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.

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#### **Department of Industry**

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#### **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.

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#### **Revenue Canada**

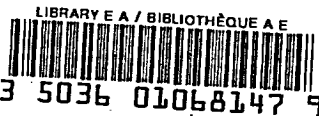
Revenue Canada, Customs Program Branch provides a NAFTA Help Desk telephone line with service available in Spanish. For information, call (613) 941-0965.

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

**Society of Plastics Industry of Canada**  
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**Canadian Plastics Institute**  
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**Canadian Chemical Producers Association**  
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**Canadian Manufacturers' Association**  
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## MEXICO

### Government Departments

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