

The Apparel Market



THE OPPORTUNITY

The Mexican apparel sector is growing rapidly, and high-quality fashion-oriented clothing is in particular demand.

There are several factors which are creating substantial opportunities both for direct Canadian exports of apparel and for joint ventures with Mexican companies.

- The Mexican population is young and growing rapidly.
- Although only about one-fifth of Mexicans are considered potential consumers of high-quality imported apparel, this group is large in absolute terms and is concentrated in major urban markets.
- The retail sector is becoming more sophisticated and is responding to rising demand for high-quality fashion-oriented apparel.
- Most Mexican clothing manufacturers lack the technology and expertise to keep up with changing demands.
- Canadian experience with better-quality, short-run private label programs in conjunction with sophisticated marketing and inventory control systems, is likely to mesh well with Mexican needs.

THE APPAREL MARKET IN MEXICO

The Mexican apparel market produces more than US \$5 billion worth of clothing annually. Until 1988, the industry was protected by formidable trade barriers which kept import penetration low. Traditionally, wealthy Mexicans have purchased designer clothing on trips abroad, while most consumers have been satisfied with domestic goods.

With rising incomes (until the December, 1994 devaluation) and greater exposure to the international fashion scene, the demand for high-quality, fashion-oriented clothing has grown rapidly. Young people, who are influenced by European and U.S. media, have been a strong force in this market.

At the same time, Mexico's liberalized trade environment has exposed domestic producers to intense competition. Many of them have not survived the challenge: both the number of companies and the number of people they employ has fallen. Many Mexican apparel manufacturers have discovered that their low-wage, low-productivity configuration is no match for modern technology and skilled technical workers. Indeed, the most successful Mexican producers are those which have modernized every facet of their operations.

Many medium-sized apparel and textile manufacturers are looking for foreign partners to help them modernize. Mexico's exports rose by one-third in the first five months following the devaluation of the

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: The Apparel Market**. This information on the Mexican Apparel 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

Tel: 1-800-267-8376 or
(613) 994-4000
Fax: (613) 996-9709
FaxLink: (613) 944-4500
Bulletin Board 1-800-628-1581 or
(IBB): (613) 944-1581

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
Fax: (613) 237-7666

Copyright © Minister of Supply and Services,
August 1995
Cat. No. E73-9/30-1995-1E
ISBN 0-662-23173-2

Disponible en français

SPONSORED BY



Department of Foreign Affairs and International Trade / Ministère des Affaires étrangères et du Commerce international



peso, creating an enormous opportunity. Many Mexican firms cannot meet the quality standards demanded by export markets. They will have to modernize in order to take advantage of the surge in export opportunities. As a result, Canadian expertise with short, flexible production runs of fashion-oriented clothing is likely to lead to growing opportunities for joint ventures. In the current environment, however, the Canadian partner should be prepared to provide its own source of financing.

Canadian exports of apparel products to Mexico totalled only about US \$2.5 million in 1993, a tiny fraction of Mexico's total apparel imports of US \$1.3 billion. Nonetheless, exports have risen sharply over the past few years, and recent developments point to new opportunities for Canadian producers, especially in niche markets such as private labels. While the devaluation of the peso has cut consumer spending power, it has also opened up opportunities for companies that can provide a lower-cost alternative for high-priced European fashion goods.

INDUSTRY STRUCTURE

At the end of 1992, the Mexican apparel industry consisted of just over 13,000 firms which employed about 260,000 people. The 200 largest firms employ an average of about 500 workers each. Roughly 3,000 firms are classified as small or medium in size and they employ about half of the workers in the industry. The rest of the industry is made up of micro-enterprises typically employing three or four workers. These data exclude approximately 300 plants operating in the *maquiladora* zones.

Mexican textile firms are mostly family-owned, and traditionally, there has been very little vertical integration in the industry. Mexico's

employment laws are partially responsible for this fragmented structure. The laws impose onerous burdens on employers when an employee is laid off or terminated. As a result, many larger firms subcontract work to small producers. These firms will often cut prices rather than lay off family members during economic downturns.

Nonetheless, increased competition is motivating trends towards both vertical integration and foreign ownership. Textile production is much more capital intensive than apparel manufacturing, so textile producers face greater challenges from open competition. They need to modernize and improve product quality, but are hard-pressed to find the capital they need. One solution is to initiate joint ventures with apparel manufacturers. Such integration moves the textile producer closer to the market, and the wider margins enjoyed by clothing products create a source of financing for modernization.

For their part, apparel manufacturers, faced with poor-quality domestic supplies, are increasingly entering into joint ventures with textile firms. Many of the textiles companies that have integrated downstream are those which specialize in cotton knits and which now make T-shirts and underwear. This includes *Avante Textil*, *Omnitex*, *Yasbek*, *Rovitex*, *Textiles Santa Julia*, and *Sara Lee*.

Much of the technology in use in the Mexican textile sector is considered obsolete. Internal capital is scarce as a result of the economic crisis instigated by the devaluation of the peso, and because foreign competition has kept earnings low. External capital is hard to obtain, especially for firms with no export earnings. Annual interest on peso loans was more than 40 percent in mid-1995.

The fragmented industrial structure and a perception that cheap labour is a substitute for modern technology have also been impediments to

modernization. Many companies, especially the smaller ones, have difficulty obtaining modern equipment which is hard to find in Mexico.

IMPORTS

Estimates of Mexico's apparel production and imports vary widely. According to the Statistics Canada World Trade Database, imports of all apparel reached US \$1.3 billion in 1993, which was about one-quarter of the market. Between 1990 and 1993, apparel imports increased by an average of 30 percent per year. The United States dominates the market for imported apparel, followed by Korea.

Canada's apparel exports to Mexico increased from less than US \$500,000 in 1990 to about US \$2.5 million in 1993. This is roughly two-tenths of 1 percent of the import market. Undergarments and outerwear were the fastest-growing products.

COMPETITION

MEXICAN APPAREL PRODUCERS

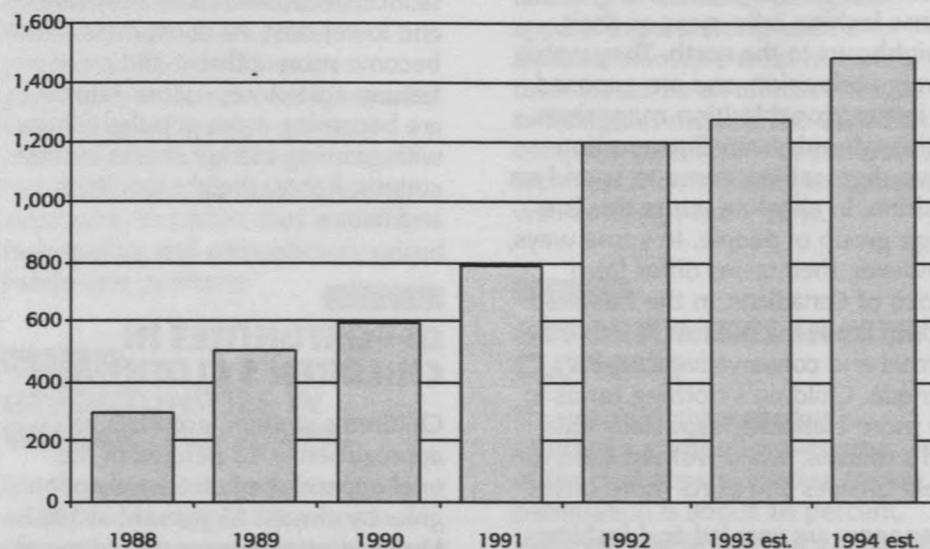
Most Mexican apparel firms are family-owned. *Avante Textil* is the only publicly-traded producer in Mexico. Recent trends are towards greater foreign investment in the form of joint ventures, especially partnerships with textile manufacturers. Examples include Sara Lee's acquisition of *Rinbros*, *Estelar* and *Mayorca*, as well as joint ventures involving Jantzen/CYDSA and *Cone Mills/Parras*.

FOREIGN COMPETITORS

The principal competitors for Mexican apparel imports are the United States, Korea and Japan. However, Hong Kong, Italy and China also export significant quantities of clothing to Mexico.

Apparel Imports into Mexico, 1988-1994

(US \$ millions)



Source: Statistics Canada World Trade Database.

Many American exporters are now establishing their own facilities in Mexico or elsewhere in Latin America. While Korean producers have also expressed some interest, their work practices and style of management is not always compatible with the Mexican way of doing things. So far, Korean investment has been directed to Honduras, Guatemala and El Salvador, all of which have access to American and Mexican markets due to the Caribbean Basin Initiative (CBI).

Foreign firms have also been moving to establish licensing agreements with Mexican manufacturers. In particular, a number of big-name designers have recently licensed their products for manufacture in Mexico.

RETAILERS

There are about 50,000 retail apparel stores in Mexico. More than 20 percent are located in Mexico City. Competition has increased dramatically over the past few years and retailing is undergoing dramatic transformations for a variety of reasons.

- **Decline of family stores.** Supermarkets and department stores have increased efficiency and improved merchandising. They are now cutting into the traditional market share of the family stores which have dominated the retail market.
- **Emergence of shopping malls.** New American-style mall developments are springing up all over the country. Most of the large chains are pursuing joint ventures with foreign retailers. Some of these new developments have been slow to prosper, and some observers believe the three major urban markets are saturated.
- **Expansion of national chains.** Retailers are now seriously looking at the smaller and less affluent centres in Mexico. *Sears de México* and *El Puerto de*

Mexican Apparel Imports from the World, 1993

Average Annual Rate of Change, 1991-1993

Commodity

US \$ millions Growth in percentage

Commodity	US \$ millions	Growth in percentage
trousers, breeches etc. of textile fabrics	280	30
other outer garments of textile fabrics	200	16
shirts, men's, of textile fabrics	161	57
undergarments, knitted or crocheted of wool	144	40
jerseys, pullovers, twinsets, cardigans, knitted	95	66
other outer garments & clothing, knitted	81	23
corsets, brassieres, suspenders and the like	62	5
articles of apparel & clothing accessories, of plastic	61	17
articles of apparel & clothing accessories, of leather	31	27
coats and jackets of textile fabrics	31	74
clothing accessories of textile fabrics	25	27
overcoats and other coats, men's	24	47
dressess, women's, of textile fabrics	24	37
skirts, women's, of textile fabrics	15	26
suits, men's, of textile fabrics	15	18
clothing accessories, knitted or crocheted, n.e.s.	14	63
headgear and fittings thereof, n.e.s.	14	2
suits & costumes, women's, of textile fabrics	12	45
fur clothing, articles made of fur skins	11	122
dressess, skirts, suits etc., knitted or crocheted	9	-8
undergarments, excluding shirts, of textile fabrics	6	37
undergarments, knitted, of synthetic fibres	0	na
Grand Total	1,313	30

Note: Commodities are sorted in descending order of the total values of imports in 1993. Figures based on SITC classification.

Source: Statistics Canada World Trade Database.

Major Apparel Manufacturers in Mexico

Company	Product
Carnival	underwear and foundation garments
Parras	jeans
Confitalia	men's suits
Industria Monterrey	shirts and trousers
Grupo Haydar	jeans and denim wear
Manufacturera Libra	jeans
Playtex	foundation garments
Cantabria	jeans
Originales Finos	jeans, dress shirts and casual pants/trousers

Source: *Cámara Nacional de la Industria del Vestido (CNIV)*, National Chamber of the Apparel Industry.

Liverpool have been leaders in building smaller stores in provincial towns. Three top supermarket chains, *Cifra*, *Gigante* and *Comercial Mexicana*, are wooing customers in rural areas with discount operations.

- **Catalogue sales.** Direct mail and catalogue sales are not a big business in Mexico, partly because package delivery services are not well-developed. Nieman Marcus, the Texas-based, up-scale retailer and direct-mail house, introduced its catalogue to the Mexican market in 1994. Its progress will be closely watched by others in the direct-mail business.
- **Direct sales.** Direct sales are much more common in Mexico than they are in Canada. Direct-sales operators conduct home parties and sell direct to individuals at the office or home. Companies like Avon and House of Fuller manufacture full lines of clothes for distribution through their own representatives.

FASHIONS

Mexicans are subject to many of the same fashion influences as their neighbours to the north. They watch foreign television, and are exposed to international fashion magazines. Although only a small proportion have disposable income to spend on fashion, in absolute terms this is a large group of people. In some ways, however, their tastes differ from those of Canadians. In the business world, the fashion tends to be more formal and conservative than in Canada. Children's clothing tends to be more elaborate, especially little girl's dresses, while women tend to wear dresses and skirts more often.

Teenagers are very fad and fashion conscious and tend to spend a much larger percentage of their disposable income on clothing than the average consumer. About one-third of all teenagers between the ages of 15 and 19 work. While teenagers are often employed in low-paying jobs, they are very aware of what their peers are wearing and gain acceptance in certain circles based on their appearance. These fashions are quick to change and teen clothing goes out of style very quickly.

Seasons

The climate throughout Mexico is temperate, although some parts of the country have periods of cool weather, particularly in the evening. There is a limited market for heavy outerwear. For example, Mexico imported US \$5 million worth of fur garments in 1992. Less variable weather means that buying seasons are longer. There are two main market seasons: fall/winter and spring/summer.

Sizes

On average, Mexicans are physically smaller than Canadians, so a larger percentage of small and petite sizes should be anticipated in orders from Mexico. There is also a market for larger-size petites.

Fabric Choice

Traditionally, polyester and poly-blends have been the most popular fabrics, because of their easy care and lower cost. As consumers have become more affluent and more fashion conscious, natural fabrics are becoming more popular. Fabrics with growing market shares include cottons, lighter-weight woollens and linens.

OPPORTUNITIES IN CHILDREN'S CLOTHING

Children's clothing accounts for approximately 40 percent of the total apparel market. Consumption grew by almost 13 percent in 1993. Market growth is expected to remain strong until at least 2000, when birthrates are projected to decline.

Mexicans who can afford it want durable clothing with a strong design element. American clothing made by companies such as Osh Kosh B'Gosh, which is of high quality and good design, is popular but too expensive for most Mexicans. The Mexican industry is very competitive in high-quality, labour-intensive children's clothing such as party dresses and embroidered appliqué tops.

In spite of Mexico's competitive strengths in children's wear, the industry has not traditionally been an exporter. According to the *Cámara Nacional de la Industria del Vestido (CNIV)*, National Chamber of the Apparel Industry, less than ten companies have exported children's wear as of March 1994.

These factors have led to an increased interest in strategic alliances. For example, *Baby Duy* joined forces with a small, New York-based children's clothing company called *Nouvelle Image Kids*. The American partner distributes *Baby Duy* products in the north-eastern United States.

Opportunities for Canadian Suppliers

There are opportunities for partnerships between Mexican firms and Canadian apparel producers. The Mexicans are particularly interested in high-quality, well-designed fashion-oriented children's clothing. They also need technical expertise and marketing assistance. In return, they can offer high-quality and competitively-priced handmade products.

OPPORTUNITIES IN WOMEN'S CLOTHING

In 1992 domestic production accounted for about 95 percent of the market for women's clothing. Recently, imports have begun to play a much larger role because Mexican producers have not kept pace with the increasingly fashion-oriented market.

Women working outside the home have become the most dynamic component of this market. They have both a need for certain types of clothing and an independent source of income. Government statistics estimate the formal female labour force at about 5.6 million.

Opportunities for Canadian Suppliers

Buyers of women's clothing are looking for higher fashion content than most domestic manufacturers can provide. They are interested in natural materials like cotton, provided they can be obtained at a reasonable price. Lingerie is considered an underdeveloped market, especially fine cotton nightwear and "sexy" undergarments. Other product opportunities include fashion and casual trousers, dresses, woven blouses and knit shirts.

Canadian designers who produce high-quality, well-designed products that can compete with European apparel have the best prospects.

While Mexican consumers are very brand conscious, they are also looking for style and value. Private labelling of Canadian-designed apparel in partnership with a Mexican women's-wear manufacturer would be an effective way of entering this market. The Canadian company would have to contribute technical and marketing expertise as well as design know-how.

OPPORTUNITIES IN MEN'S CLOTHING

The men's clothing market is estimated at about one-quarter of the total apparel market. Import penetration is about 18 percent, triple the rate of women's clothing.

Compared with Canadian styles, Mexican men's business and work wear tends to be less fashion oriented, at least in the low- and medium-price ranges. Suits and shirts are more likely to be made of blended fabrics with a higher synthetic component. The most common are polyester/wool for suits and polyester/cotton for shirts. Mexican apparel plants are fairly well-equipped to meet the demand for basic commodity goods such as shirts, socks, underwear, suits and jeans.

The high end of the work and casual market is served by the big-name European designers, such as Hugo Boss and Giorgio Armani. A few Mexican companies, such as *Confitalia* are able to compete effectively in this market through licensing agreements with foreign designers and access to foreign fabrics. Other domestic men's wear manufacturers are becoming more aware of the mid- to high-end market. Some of them perceive the potential to compete in this niche if they establish strategic alliances that will give them access to capital, technology, marketing and design expertise.

Opportunities for Canadian Suppliers

There is an opportunity in this market segment for strategic alliances between Canadian apparel manufacturers and Mexican firms. Industry observers agree that there is a shortage of design-intensive products targeted at younger consumers in the medium- to low-end of the market. In general, young people in Mexico are style conscious, but lack the income to purchase high-end products. A private-labelling program represents one way of establishing stylish and relatively low-cost products.

There are also opportunities for direct exports of high-fashion casual wear aimed at the youth market. Trousers, outerwear and shirts are all imported in substantial quantities.

MARKET ENTRY STRATEGIES

DISTRIBUTION

Most larger Mexican retailers buy directly from manufacturers, especially where private labels are involved. Mexico's major retailers employ buyers who attend fashion shows and visit the key fashion marts in the United States and Europe. They are also open to viewing samples of new lines at their place of business. This is best arranged through a Mexican agent or representative.

There are a few independent agents that handle multiple lines, and they tend to represent smaller manufacturers or designers. These agents are under pressure because many of the larger retailers are now pushing for better service and want to deal directly with their suppliers.

Many of the larger specialized chains and the major department stores purchase imported goods through buying agents or groups. For example, *El Puerto de Liverpool* is a member of the Atkins buying group based in New York City.

Most Mexican apparel manufacturers have exclusive sales agents who usually work as employees. In some cases, the manufacturer may fill out its product line by representing lines from other companies, including foreign manufacturers.

Mexican apparel manufacturers are struggling to keep up with market trends towards greater fashion orientation, increasingly sophisticated distribution systems, and growing demands for customer service. They are open to joint ventures with foreign manufacturers who can contribute technical and marketing expertise, in exchange for access to the Mexican market.

Participation in trade shows is an effective way for Canadian apparel suppliers to introduce their products and meet potential customers, agents and partners. A list of apparel shows is provided in the Key Contacts in Mexico section of this summary.

THE REGULATORY ENVIRONMENT

NORTH AMERICAN FREE TRADE AGREEMENT (NAFTA)

To qualify for favourable tariff treatment under the NAFTA, goods must comply with the rules of origin specified in that agreement. The rules for apparel are somewhat more complex than for most other products. In general, the rules of origin are "yarn forward".

All products imported into Mexico must be supported by a certificate of origin. The exporter must consult the detailed rules of origin for the product involved.

Under the NAFTA, there is a provision for certain goods made with imported fabrics to be exported duty-free up to each country's Tariff Preference Level (TPL). This is an expansion of the Tariff Rate Quotas (TRQ) program included in the former Canada-U.S. Free Trade Agreement (FTA). TPLs must be

listed on a Certificate of Eligibility issued by the country of export.

LABELLING

Mexico has regulations governing the labelling of all consumer goods. The label must be in Spanish, affixed "at the source", and must contain specific information set out in the regulations. Textiles, clothing and accessories must also meet additional labelling requirements which are enforced at the border. Apparel labels must also meet the requirements of the official Mexican standard NOM-004-SCFI-1993.

Draft amendments that are expected to become effective in mid-1995 will include several important requirements for apparel labels, including more extensive instructions for product care.

STANDARDS

A wide number of products are covered by mandatory product standards known as *Normas Oficiales Mexicanas (NOMs)*, Mexican official standards. Textiles, apparel and accessories are covered by NOM-004-SCFI-1993. Products subject to *NOMs* must be tested in Mexico and a certificate of compliance obtained from the *Secretaría de Comercio y Fomento Industrial (SECOFI)*, Secretariat of Commerce and Industrial Development. The certification number must be included on apparel labels, along with the *NOM* logo.

KEY CONTACTS

CANADA

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
InfoCentre Bulletin Board (IBB)
Tel.: 1-800-628-1581 or
(613) 944-1581

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 the Department of Industry (DI), 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.

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.

Market Intelligence Service 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. The intelligence is used by Canadian businesses 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 American imports. Two-thirds of the clientele for this service are small businesses. Call: (613) 954-4970.

Canadian International Development Agency (CIDA) is an important possible source of financing for Canadian ventures in Mexico. A special fund is available through 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 licensing arrangements. INC supports the development of linkages with the private sector in Mexico by encouraging Canadian enterprises to share their skills and experiences with partners in Mexico and other countries. A series of INC mechanisms help enterprises to establish mutually beneficial collaborative arrangements for the transfer of technology and the creation of employment in Mexico.

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 businesses 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 coverage 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.

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

Sponsoring Organizations

Baker & McKenzie

Baker & McKenzie is one of the largest international law firms with offices in 35 countries. They presently have four offices

in Mexico, in the cities of Juárez, Mexico City, Monterrey and Tijuana. In addition to providing legal advice, the firm's offices in Canada and Mexico work to assist Canadian companies to find the right partner to enable them to establish or expand their activities in Mexico.

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 Apparel Federation

130 Slater Street
Suite 605
Ottawa, ON K1P 6E2
Tel.: (613) 231-3220
Fax: (613) 231-2305

Canadian Apparel Federation — Design Division

372 Richmond Street West
Suite 112
Toronto, ON M5V 1X6
Tel.: (416) 977-3620
Fax: (416) 977-2637

Canadian Association of Wholesale Sales Representatives

1712 Avenue Road
P.O. Box 54546
Toronto, ON M5M 4N5
Tel.: (416) 966-2466
Fax: (416) 966-4669

Retail Council of Canada

210 Dundas Street West
Suite 600
Toronto, ON M5G 2E8
Tel.: (416) 598-4684
Fax: (416) 598-3707

The Wool Bureau of Canada

33 Yonge Street
Suite 820
Toronto, ON M5E 1G4
Tel.: (416) 361-1440
Fax: (416) 361-3179

Men's Clothing Manufacturers Association Inc.

555 Chabanel Avenue West
Suite 801
Montreal, PQ H2N 2H8
Tel.: (514) 382-3846
Fax: (514) 383-1689

Children's Apparel Manufacturers Association

8270 Mountain Sights Avenue
Suite 101
Montreal, PQ H4P 2B7
Tel.: (514) 731-7774
Fax: (514) 731-7459

Fur Council of Canada

1435 St. Alexandre Avenue
Suite 1270
Montreal, PQ H3A 2G4
Tel.: (514) 844-1945
Fax: (514) 844-8593

Design British Columbia

355 Burrard Street
Suite 110
Vancouver, BC V6C 2G8
Tel.: (604) 681-3392
Fax: (604) 681-3394

Western Canadian Designers and Fashion Association

355 Burrard Street
Suite 1260
Vancouver, BC V6C 2G8
Tel.: (604) 689-7677

Manitoba Fashion Institute

114-85 Adelaide Street
Winnipeg, MB R3A 0V9
Tel.: (204) 842-7314
Fax: (204) 943-2228

Apparel Ontario

130 Slater Street
Suite 605
Ottawa, ON K1P 6E2
Tel.: (613) 565-3047
Fax: (613) 231-2305

Apparel Manufacturers Institute of Quebec

555 Chabanel Avenue West
Suite 801
Montreal, PQ H2N 2H8
Tel.: (514) 382-3846
Fax: (514) 383-1689

Association des entrepreneurs en couture du Québec

75 Port Royal Street East
Suite 235
Montreal, PQ H3L 3I1
Tel.: (514) 384-6147
Fax: (514) 384-1552

Association pour la promotion des designers de mode du Québec

3575 St. Laurent Boulevard
Suite 117
Montreal, PQ H2X 2T7
Tel.: (514) 282-1031
Fax: (514) 282-1051

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 targetted 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

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

KEY CONTACTS

MEXICO

Mexican Government Departments

Secretariat of Commerce and Industrial Development

Secretaría de Comercio y Fomento Industrial (SECOFI)
Alfonso Reyes No. 30
Col. Hipódromo Condesa
06140 México, D.F.
México
Tel.: 729-9256/9257
Fax: 729-9343

**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: 729-9477

National Institute for Statistics, Geography and Informatics

Instituto Nacional de Estadística, Geografía e Informática (INEGI)
Edificio Sede
Av. Héroe de Nacosari No. 2301 Sur
Fraccionamiento Jardines del Parque
20270 Aguascalientes,
Aguascalientes
México
Tel.: 918-6947
Fax: 918-6945

Secretariat of Agriculture and Water Resources

Secretaría de Agricultura y Recursos Hidráulicos (SARH)
Insurgentes Sur No. 476, Piso 13
Col. Roma Sur
06760 México, D.F.
México
Tel.: 584-0786/0834
Fax: 584-1887

Central Bank of Mexico

Banco de México
Tacuba No. 4, Piso 1
Col. Centro
06059 México, D.F.
México
Tel.: 512-5817, 237-2378
Fax: 237-2370

National Development Bank

Nacional Financiera (NAFIN)
Insurgentes Sur No. 1971
Col. Guadalupe Inn
01020 México, D.F.
México
Tel.: 325-6668/6669
Fax: 325-6009

National Oil Company

Petróleos Mexicanos (PEMEX)
Av. Marina Nacional No. 329
Col. Huasteca
11311 México, D.F.
México
Tel.: 250-2611
Fax: 625-4385

Industry Associations

National Chamber of the Apparel Industry

Cámara Nacional de la Industria del Vestido (CNIV)
Tolsá No. 54
Col. Centro
06040 México, D.F.
México
Tel.: 588-7822, 761-5446
Fax: 578-6210

National Chamber of the Apparel Industry in Jalisco

Cámara Nacional de la Industria del Vestido en Jalisco
Av. Vallarta No. 3233
Plaza Galería Exhimoda
Locales 3y 4, Zona H
44690 Guadalajara, Jalisco
México
Tel.: 647-3959
Fax: 647-3996

National Association of Department Stores

Asociación Nacional de Tiendas de Autoservicio y Departamentales (ANTAD)
Homero No.109, Piso 11
Col. Polanco
11560 México, D.F.
México
Tel.: 254-6220/1714, 545-8803
Fax: 203-4495, 250-2536

Association of Specialty Stores

Asociación de Comercio Especializado (ACE)
Periférico Sur No. 5482
04700 México, D.F.
México
Tel.: 665-5802/5467
Fax: 665-9248

**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, 564-9218/8618
Fax: 584-5317

Trade Shows

Exhimoda

Exhibición de Modas Camarales A.C.
Av. Vallarta No. 3233
Plaza Galería Exhimoda
Local 13, Zona G
Guadalajara, Jalisco
México
Tel.: 122-7787
Fax: 647-3940

Expo-Fashion Mexicana

*Imagen de Exposiciones Mexicanas,
S.A. de C.V.*
Viaducto Miguel Alemán No. 165
Col. Roma Sur
06760 México, D.F.
México
Tel.: 564-7571
Fax: 574-9481

Semana Internacional de la Moda

*c/o Cámara Nacional de la
Industria del Vestido en Nuevo León*
Modesto Arreola No. 905 Oriente
Col. Centro
64000 Monterrey, Nuevo León
México
Tel.: 342-3937/3974
Fax: 342-2633

Expomoda

*c/o Cámara Nacional del Vestido
(CNIV)*
Modesto Arreola No. 905 Oriente
Col. Centro
64000 Monterrey, Nuevo León
México
Tel.: 342-2633/3937
Fax: 342-3937

Expo-Anfrapiel

*Asociación Nacional de Fabricantes
de Ropa y Artículos en Piel*
Blv. Adolfo López Mateos No. 3401
Oriente
Edificio Cámara del Calzado
Fraccionamiento Julián de Obregón
37290 León, Guanajuato
México
Tel.: 11-7801
Fax: 11-7801

La Fiesta de los Niños

*Comercialización Internacional de
Eventos (CIE)*
Liendo No. 627 Sur, Despacho 302
Col. Obispado
64010 Monterrey, Nuevo León
México
Tel.: 333-8049, 348-9050
Fax: 333-8049

Trade Publications

Apparel Industry Internacional
6255 Barfield Rd., Suite 200
Atlanta, Georgia 30328-4300
U.S.A.
Tel.: (404) 252-8831 ext. 290
Fax: (404) 252-4436

**Women's Wear Daily Fashion
International**

Río Guadalquivir No. 76-901
Col. Cuauhtémoc
06500 México, D.F.
México
Tel.: 514-3152
Fax: 514-3152
New York Office:
Editorial Tel.: (212) 630-3586
Advertising Tel.: (212) 630-4699

DOCS
CA1 EA612 95C55 ENG
The apparel market. --
54442915