

# Safety and Security Products and Services



## THE OPPORTUNITY

The Mexican market offers interesting opportunities for Canadian suppliers of safety and security equipment and services:

- Mexico's economic crisis has caused a sharp rise in crime rates, especially those for violent crime.
- The nation's dilapidated distribution systems for natural gas, liquefied petroleum gas (LPG) and gasoline are the source of major fire hazards and have caused a number of high-profile disasters.
- Occupational health and safety is still seen mainly in terms of basic personal protective equipment, much of which is made in Mexico. But a trend towards engineered solutions is beginning to emerge.

## AN EMERGING SECURITY CONSCIOUSNESS

Mexicans have not traditionally enjoyed the standards of safety and security that Canadians are accustomed to, either at work or in their personal lives. And the situation has been getting worse. Public resources for crime and fire fighting have been strained by the recent economic crisis following the devaluation of

the peso in December 1994. This has forced individuals and corporations to take action to protect themselves. At the same time, the North American Free Trade Agreement (NAFTA) has put pressure on the Mexican government to improve its occupational health and safety record. These trends are creating a new interest in methods of improving safety and security.

Personal security has long been a serious concern in Mexico, especially for the relatively affluent. Income disparities are much greater than they are in Canada, which tends to make wealth more conspicuous. This problem has been greatly magnified by the economic crisis. Rates of theft and robbery soared as more than one million people were thrown out of work. For example, in the Federal District, the number of automobile thefts involving violence rose from 35 per day in 1994 to 59 per day in 1995. Over the same one-year period, violent robberies of homes rose by 36 percent.

Mexico's occupational health and safety standards are not as comprehensive as Canada's and they are not as well-enforced. Mexican labour

## 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: Safety and Security Products and Services**. This market information on Mexican safety and security products and services 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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Cat. No. E73-9/67-1996-1E  
ISBN 0-662-25211-X  
Disponible en français.

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unions tend to concentrate on economic benefits: they have not been as aggressive as their Canadian counterparts in pressing for health and safety improvements. In fact, health and safety clauses in collective agreements are most often proposed by management. The main impetus for improved standards is coming from government. This is partly a result of NAFTA, which included a "side agreement" on labour. The North American Agreement on Labor Cooperation (NAALC) calls upon all three governments to guarantee safer and cleaner working environments. Rising premiums for workers' compensation are another force motivating safer work practices.

Fire safety is difficult to evaluate because of the lack of reliable statistics. Many fires are not reported. The United States Department of Commerce has estimated that an average 1,300 Mexicans lose their lives and another 5,200 are injured in fires annually. The economic crisis has reduced public spending on fire safety, placing greater onus on owners of homes and businesses to provide their own fire abatement systems.

Canadian companies, especially those with niche technologies, usually find that partnering with a Mexican firm is the most effective market entry strategy. Mexican suppliers understand the market and do not face the cultural barriers that foreign suppliers do. But they lack technical sophistication and are strapped for capital. Canadian companies that can fill these gaps will find attractive long-term opportunities in the Mexican market.

## THE SAFETY AND SECURITY SECTOR

The safety and security sector includes companies that supply equipment and services for the prevention of

personal injury and property damage from occupational hazards, crime hazards and fire hazards. The sector includes manufacturers of protective products and technologies as well as distributors of imported products who also advise on system design, maintenance and operation. There are few professional safety and security consultants. Mexican companies dominate the low-technology end of this sector, but they are mostly dependent on imports for advanced technologies.

## OCCUPATIONAL HEALTH AND SAFETY

According to official government statistics, there were more than 437,000 occupational accidents and illnesses in Mexican private-sector workplaces during 1995. Total lost time was 11 million days. These include only incidents within the jurisdiction of the *Instituto Mexicano del Seguro Social (IMSS)*, Mexican Institute for Social Security, which covers private-sector workers. Public-sector employees are covered by the *Instituto de Seguridad y Servicios Sociales de los Trabajadores del Estado (ISSSTE)*, Institute for Security and Social Services for Public Sector Employees. It reported only 1,335 accidents during the first eight months of 1995.

Although notoriously lax, enforcement of occupational health and safety standards has been stepped up in recent years. Nonetheless, government officials say that only 5 percent of 670,000 registered companies were visited by inspectors in 1995. The insured workers employed by those companies make up less than 10 percent of Mexico's population.

Engineering controls for health and safety hazards are a relatively new concept in Mexico, and the emphasis is still on personal protective equipment for workers. The regulations include detailed requirements for a

wide variety of protective clothing and equipment. As the restructuring of the Mexican economy proceeds and regulation efforts get tougher, more companies can be expected to deal with health and safety hazards at their source.

## PROTECTION AGAINST CRIME

Mexico's larger cities have always been relatively dangerous and the economic crisis, precipitated by the peso devaluation of December 1994, has made the situation worse. Criminals tend to be heavily armed and in the absence of adequate police protection, they have become very bold. Armed robbery is the most threatening problem. Every day, almost 60 occupied cars are seized from their owners in Mexico City, typically at gunpoint. A total of 30,000 automobiles were stolen during 1995, and the number of violent robberies of homes rose by 36 percent to reach 923. Crime against business has increased by similar proportions, and organized crime has become a growing threat.

These events have led to a rapid growth in the market for security products. According to United States Department of Commerce estimates, the market for personal security equipment was expected to grow by 15 percent to reach US \$54 million in 1996. About 80 percent of this equipment is imported.

*A Programa Nacional de Seguridad Pública 1995-2000*, National Public Safety Program, was unveiled in July 1996. Twelve thousand new police officers will be hired, and there have already been a number of publicly-sponsored crime-fighting campaigns. Government demand for security equipment during 1996 is estimated at double the 1995 levels.

## FIRE SAFETY

Government purchases of fire-fighting equipment and fire-prevention sys-

tems for public buildings account for about two-thirds of the fire-safety market. Industrial and commercial enterprises are also major customers because they are forced to take strong preventive measures by insurance companies. Sprinklers, detectors and alarm systems are all in demand. The home fire-abatement market is limited mainly to smoke detectors and small fire extinguishers.

Fire departments are the responsibility of the state governments. Gas leaks exceed fires as causes for fire department mobilization. In Mexico City, for example, the fire department answered almost 10,000 gas-leak calls in 1995, but only 6,000 fire calls. Mexicans are not typically as aware of fire hazards as other North Americans and they are generally lax in taking even the most basic precautions. A number of high-profile disasters have raised the public consciousness of fire safety and spawned public awareness campaigns.

## CUSTOMERS

### COMMERCIAL ENTERPRISES

The commercial sector is exposed to both safety and security hazards. Almost 20 percent of all occupational injuries occur in commercial establishments, including restaurants and hotels. According to estimates from *Instituto Nacional de Estadística, Geografía e Informática (INEGI)*, National Institute for Statistics, Geography and Informatics, commercial losses from crime tripled between 1995 and 1996. Because they deal with the public, most commercial enterprises are also forced by building codes and insurance company requirements to maintain high levels of fire safety. Shoplifting is the major threat facing retail stores and armed robbery is also a problem. Truck hijacking is common in Mexico, and vehicles

belonging to retail chains are often targets. Mexican security firms are also significant customers for a variety of products.

### INDUSTRIAL ENTERPRISES

Worker health and safety is the biggest safety and security challenge facing industrial enterprises. The demand for engineering solutions to health and safety hazards is concentrated mainly in the larger multinational companies. Many of them apply corporate-wide standards based on practices in their home companies. Mexican companies are generally open to new cost-effective solutions, but so far have not been subjected to the same level of regulatory scrutiny. Their principal demands are for personal protective equipment. So far, only the largest Mexican companies have developed a "prevention culture."

Industry experts note that despite the recent crime wave, industrial losses from theft have remained stable. Much of this theft is perpetrated by employees.

### GOVERNMENT INSTITUTIONS

Government institutions are large users of safety and security products. They have responsibility for public safety and are also more likely than most private companies to comply with official standards and regulations.

In July 1996, the government announced a new five-year public security program known as *Programa Nacional de Seguridad Pública 1995-2000*, National Public Safety Program. This program is expected to substantially increase the demand for security goods and services by police forces.

Fire departments are the responsibility of Mexico's 31 states and the Federal District. The fire departments have an ongoing demand for a variety of fire-fighting equipment. Local manufacturers are limited mainly to hoses, axes and fire extinguishers.

### INDIVIDUAL CONSUMERS

Individual Mexicans are bearing the brunt of Mexico's security crisis. Individual workers have little influence over their employers' health and safety policies, and are not significant customers in that market. But individuals have a strong incentive to protect themselves from fire and crime, and thus are open to marketing efforts. In fact, the recent surge in crime and advertising of crime-prevention equipment has led to soaring sales in this market. Individuals need to protect themselves, their homes and their vehicles.

## COMPETITORS

Canadian suppliers of safety and security products face competition from both Mexican and foreign companies. In general, Mexican manufacturers dominate the low-technology end of the market. They are highly competitive for such products as fire extinguishers, locks and basic protective gear such as shoes, gloves and hats. The more sophisticated the product, the more it is likely to be imported. A notable exception are bullet-proof vests, which are produced and distributed by *Mantenimiento y Comercialización Industrial (Macoisa)*.

Mexican distributors are very active in the safety and security sector, especially where imported products are involved. Some of them also provide consulting services. They are especially influential in guiding purchase decisions for smoke detectors, sprinkler systems, home alarms and security devices.

Professional safety and security consulting companies are fairly new to the market and are mainly foreign. Large commercial and industrial buyers have shown interest in signing contracts with consulting specialists with international experience.

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Government agencies also provide security advice. The *Sistema Nacional de Protección Civil*, the National Civil Protection System, provides consulting services to individual home builders and construction companies regarding fire and earthquake protection. The *Secretaría del Trabajo y Previsión Social (STPS)*, Secretariat of Labour and Social Welfare, provides a health and safety consulting service.

The big retailers tend to prefer American-made products, partly because of their prestigious brand names. Products from Israel, Germany, Japan and France are also regarded as sophisticated and of high quality. Canada has not yet established a significant foothold in this market.

## **TRENDS AND OPPORTUNITIES**

### **THE PESO CRISIS**

No sector of the Mexican economy has escaped the consequences of the abrupt peso devaluation in late December 1994. Economic hardship pushed up the rate of street crime at the same time that political instability created an opening for the expansion of organized crime.

The rise in crime, combined with the inability of the government to do anything about it, reduced even further the faith that Mexican citizens and businesses place in the forces of law and order. This has fostered a huge increase in the demand for commercial, home, automobile and personal protection products and services.

### **THE COMMISSION FOR LABOR COOPERATION**

As part of the North American Free Trade Agreement (NAFTA) negotiations, separate "side agreements" on labour and the environment were signed. The labour agreement is called the North American Agreement on

Labor Cooperation (NAALC). It sets out a number of signatory obligations and establishes the Commission for Labor Cooperation. The commission includes a ministerial council and a secretariat, located in Dallas, Texas.

Under the NAALC, signatory countries are obliged to promote compliance with, and effectively enforce, their own labour laws. They must also ensure access, transparency and due process of law, and provide public information.

Much of the responsibility for Mexico's poor health and safety record falls on lax enforcement rather than inadequate standards. For this reason, it is anticipated that the activities of the commission will put pressure on the Mexican government to increase enforcement efforts. The commission has also been active in promoting technical exchanges between Canada, the United States and Mexico.

### **PRODUCT OPPORTUNITIES**

#### ***Protection against fire***

Education is the most important element of fire prevention and there may be opportunities for companies with experience in conducting public awareness campaigns. Fire detection has traditionally been limited to large corporations, especially those directly linked to fire departments. There is an emerging market for low-cost smoke detectors for residences.

Fire extinguishers are the leading fire suppression product in Mexico. The carbon dioxide type is the most popular but all types are in demand. Sprinkler systems are increasingly in demand as companies become more aware of the benefits of quick response.

#### ***Protection against burglary and armed robbery***

Burglary in Mexico is increasingly being replaced by armed robbery as criminals become more bold and better armed. Window bars and

upgraded locks provide protection against both. Guard dogs are also popular, although few are properly trained. Higher-income families are increasingly using closed-circuit television systems, interphones with video, and electric fencing.

#### ***Protection against theft of vehicles and contents***

The most popular products for vehicle protection are car alarms, steering-wheel locking devices, and digital door locks. Such devices are proving inadequate, especially because of the rise in vehicle hijackings. Frequently, wealthy occupants of vehicles are kidnapped for ransom. The thieves are usually heavily armed and often belong to organized crime groups. This trend has created a demand for tracking devices, smoke-emitting devices, delayed-response alarms, tempered glass and armoured vehicles.

#### ***Protection against personal assault***

Mexican law does not allow citizens to carry a firearm without a permit and there is a demand for legal self-defence weapons. Mace® and tear-gas products are not permitted, but there are no specific prohibitions against pepper spray or electric-shock guns. Traditionally these types of products have been targeted at middle-class women.

#### ***Protection against shoplifting***

As the consumer market has become more sophisticated, retail businesses have implemented more elaborate anti-shoplifting measures. Besides the standard guard services, false mirrors and closed-circuit television systems, stores are increasing the use of magnetic, electromagnetic and radio-frequency sensors.

#### ***Protection against industrial theft***

Industrial theft is most often perpetrated by employees. This is an area

of increasing sensitivity, and large potential demand. The most popular products for protection against industrial theft are closed-circuit television systems, metal detectors and electronically-controlled doors, but there are major opportunities for other cost-effective solutions. There is an emerging market for computer software to protect access to sensitive information.

### **Security Consulting**

There are few specialized security consulting companies operating in Mexico. Consulting services are provided mainly by security equipment distributors and public agencies. This suggests opportunities for Canadian security specialists who could form joint ventures with Mexican companies already in the market. The best opportunities will be for companies with knowledge of high-technology solutions.

## **THE REGULATORY ENVIRONMENT**

### **WORKER HEALTH AND SAFETY**

Policy concerning occupational health and safety is defined and enforced by the *Secretaría del Trabajo y Previsión Social (STPS)*, Secretariat of Labour and Social Welfare, through its *Dirección General de Seguridad e Higiene*, Safety and Hygiene Division and in accordance to the *Ley Federal del Trabajo*, Federal Labour Law.

The *Dirección General de Seguridad e Higiene* controls the *comisiones de seguridad e higiene*, safety and health commissions, in each company. Any company with more than 20 employees must have such a commission. Each company is responsible for designing and setting up training courses for all employees every year. The commission in each company is responsible for supervising these procedures.

The *Dirección General de Seguridad e Higiene* is also responsible for drafting *Normas Oficiales Mexicanas (NOMs)*, official standards, that specify specific requirements for the work environment. There are six separate *NOMs* governing personal protective equipment and several more concerning other workplace elements such as air quality, noise and vibration.

As of November 1994, Mexican companies that have workers registered in the *Instituto Mexicano del Seguro Social (IMSS)*, Mexican Institute for Social Security, are obliged to classify the risks their employees are exposed to according to a published list of criteria. The purpose of this list is to establish the workers' compensation premiums the company will have to pay to the *IMSS*.

### **PUBLIC SAFETY**

The *Secretaría de Gobernación (SG)*, Secretariat of the Interior, through the *Sistema Nacional de Protección Civil*, National Civil Protection System, is responsible for setting safety standards for homes, offices and public buildings. It also organizes emergency reaction programs and public health campaigns. In 1995, it published *Guía Técnica para la Implementación de Programas Internos de Protección Civil*. This is a technical guide to setting up emergency response programs for use by larger organizations.

### **WEAPONS**

The *Ley Federal de Armas de Fuego y Explosivos*, federal firearms and explosives law, regulates the use of weapons. The law does not permit private guard services to carry guns, except by authorization of the *Secretaría de la Defensa Nacional (Sedena)*, Secretariat of Defence. By law, the *Tolete (PR24)*, a baton, is also exclusively reserved for use by police forces. In theory, tear gas is reserved for use by the military. The law does not specifically cover pepper spray and electric-shock guns.

## **PRODUCT STANDARDS**

Many security and safety products are covered by Mexico's *Normas Oficiales Mexicanas (NOMs)*, system of official standards. In these cases, prior to importation a *NOM* certificate must be obtained from the *Secretaría de Comercio y Fomento Industrial (Secofi)*, Secretariat of Commerce and Industrial Development. Products must be tested by an accredited Mexican laboratory, although under a phase-out provision, Canadian laboratories will be able to do this in the future.

## **MARKET ENTRY STRATEGIES**

Canadian companies wishing to sell their products in Mexico usually find that establishing a local presence is an essential first step. This is especially important in the safety and security market because prestige is an important purchasing factor. Buyers and distributors who were interviewed for this publication said that Canadian products meet the quality and image requirements to become leaders in the market. As they see it, the main problem is that Canadian companies have too low a profile and have not aggressively promoted their products.

An effective way of establishing a presence in the market is to form strategic alliances or partnerships with Mexican distributors or agents. Distributors compete by offering wider and better product lines to their clients. Free technical assistance, consulting services and training are other important selling features.

### **TRADE SHOWS**

In order to make themselves known, many Canadian companies participate in trade shows and industry conferences. Three annual events are of special interest:



- **SEGUExPO:** The *Asociación Mexicana de Higiene y Seguridad Industrial (Ahmsac)*, Mexican Association of Hygiene and Security, has an annual trade show for their members and other interested companies.
- **SECURAT** is organized every summer by *OM Comunicación*. **SECURAT'97** will take place at the World Trade Centre in Mexico City, May 7 to 9, 1997.
- **TecnoExpo '97** will take place at *Exhibimex* April 22 to 25, 1997.

## 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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**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.

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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.

**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 24,000 Canadian exporters. For general information, call (613) 944-4WIN (4946); to register on WIN Exports, call (613) 996-2057, or fax 1-800-667-3802 or (613) 944-1078.

#### **Program for Export Market Development (PEMD)**

PEMD is DFAIT's primary export promotion program. It supports a variety of activities to help Canadian companies expand into export markets. PEMD shares up to 50 percent of eligible expenses. Program financial assistance is a repayable contribution, not a grant, and must be approved in advance. For general information, call the InfoCentre at 1-800-267-8376. For applications for assistance through this program, call the International Trade Centre nearest you. In Quebec, PEMD is administered by the 13 regional offices of the Federal Office of Regional Development (FORD Q).

#### **Human Resources Development Canada**

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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 CIDA under the Industrial Cooperation Program (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, or fax (819) 953-5024.

**Export Development Corporation  
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EDC helps Canadian exporters compete in world markets by providing a wide range of financial and risk management services, including export credit insurance, financing to foreign buyers of Canadian goods and services, and guarantees.

EDC has established relationships with leading commercial and public sector institutions in Mexico and Latin America. For information on the full range of EDC services, call (613) 598-2500, or fax (613) 598-6858.

**Revenue Canada**

Revenue Canada, Trade Administration Branch provides service in English, French and Spanish. Revenue Canada publications and customs notices are also available by calling or faxing the NAFTA Information Desk: 1-800-661-6121 or (613) 941-0965; fax: (613) 952-0022.

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**National Commission for Safety and Hygiene in the Workplace**  
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