Tools, Moulds, Dies and Special Machinery

THE OPPORTUNITY

The Mexican market for machine tools, moulds and dies, and special machinery may be one of the few to escape the worst effects of the December 1994 devaluation of the peso.

- Mexico's exports increased by more than a third in 1995.
- To take advantage of the export boom, many Mexican manufacturers will be forced to modernize to comply with international quality standards.
- There is virtually no production of numerically-controlled (NC) machine tools in Mexico.
- The capital shortage is driving an increased interest in used, refurbished and retro-fitted NC equipment.

Notwithstanding the strong demand, small- to medium-sized Mexican manufacturers do not have access to capital markets; innovative financing by vendors is an essential marketing tool.

THE NEW REALITY FOR MEXICAN MANUFACTURERS

Beginning in the late 1980s, the government of Mexico launched a sweeping series of economic reforms including new policies of trade liberalization, deregulation and privatization. As the industrial transformation took hold, Mexican manufacturers scrambled to modernize. Larger firms took over small family-owned enterprises as industry rationalized to meet the influx of foreign competition. Imports of industrial automation equipment doubled in the two years ending in 1993, even though an economic recession cut demand for conventional machine tools. The modernization process continued throughout 1994.

The government of President Zedillo came to power on December 1, 1994, and within a few weeks the administration stopped supporting Mexico's overvalued peso. The market reaction was much more severe than the government had anticipated. Within days, the peso had lost almost half its value. This triggered a major economic crisis, and it ultimately required more than US $40 billion in foreign loans to prevent the collapse of the financial system.

The devaluation of the peso has had a predictable effect on foreign trade. During the first eight months of 1995, non-petroleum exports

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: Tools, Moulds, Dies and Special Machinery***. This market information on the Mexican tools, moulds, dies and special machinery 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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Export MEXICO

surged by 34.2 percent. Total imports fell by less than 8 percent, but imports of capital goods plunged by 32 percent. As a result, Mexico's merchandise trade balance was transformed into a US $4.5 billion surplus, in contrast to the deficit of US $12.1 billion in the same period the year before.

As a result of these dramatic changes, Mexican manufacturers now face a new reality. The gross domestic product (GDP) is expected to fall by 4 percent or more during 1995, and this has undermined most domestic product markets. This leaves manufacturers with little choice but to export if they expect to survive and prosper.

THE MACHINE TOOL SECTOR

Machine tools are used by manufacturers to shape or form parts made of materials such as metal, plastic, wood, ceramics and rubber. Traditionally, these functions have been performed using conventional machine tools such as lathes, milling machines, boring machines and the like. Over the past decade or so, machining tasks have increasingly been accomplished using computer controlled machine tools. This makes the manufacturing process both more flexible and more consistent. The first numerically-controlled (NC) equipment used computers to generate electronic patterns that were then transferred to the machine tool using an intermediate medium, such as punched paper tape. Modern machine tools are completely integrated with the computers that control them.

The trend towards computer controlled machinery is less advanced in Mexico than it is in Canada. This is partly because there is no significant production of this type of equipment in Mexico. The principal distinction between equipment types in the Mexican market is between computerized numerically-controlled (CNC) and direct numerically-controlled (DNC) tools. As these terms are understood in Mexico, CNC equipment includes an integrated microcomputer capable of executing externally controlled designs. DNC equipment is connected to an external computer, which may directly control one machine or a network of machines. The latter configuration is known as distributed numerical control. The term NC is widely used to refer to all computer controlled equipment.

Computer assisted manufacturing (CAM) systems include NC machine tools, related computer assisted design (CAD) and computer assisted engineering (CAE) systems. Industrial robots are also gradually being introduced into the Mexican industry. The use of these technologies, however, is not nearly as advanced in Mexico as it is in Canada and the United States.

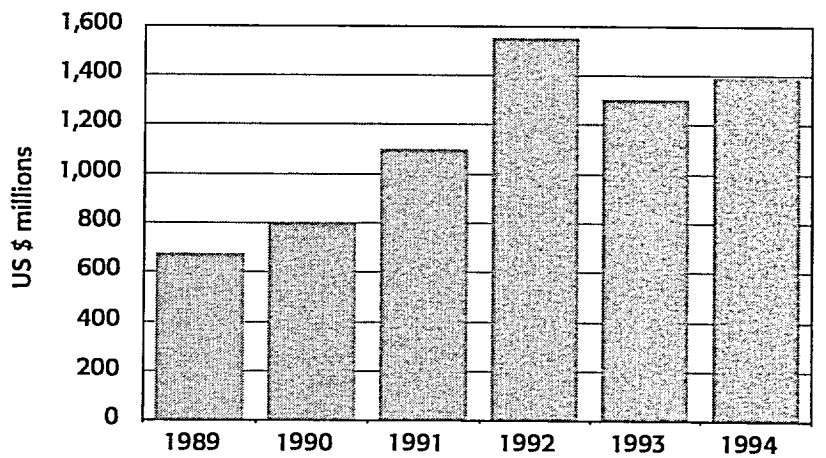
THE ROLE OF IMPORTS

There are a wide variety of estimates of the size of the Mexican import market for machine tools and related equipment. Although the Mexican import statistics follow the Harmonized System (HS) of commodity classification, there is no clear definition of which products define this industry. Some published estimates are limited to metalworking tools, and others focus only on numerically-controlled (NC) equipment.

The statistics presented in this section present a very broad view of the industry. They include equipment for both metalworking and plastics manufacture. They include both NC and conventional machine types. In addition, they include tools, dies and moulds as well as the machines that use them. By this definition, imports totalled US $1.4 billion in 1994.

This total can be divided into three major categories of roughly equal proportions: machine tools for metalworking, machine tools for working non-metals, as well as tools, dies and parts.

Machine Tools, Dies, Moulds and Related Equipment
Mexican Imports from the World



Source: *Secretaría de Comercio y Fomento Industrial (SECOFI)*, Secretariat of Commerce and Industrial Development, 1995.

CUSTOMERS

Advanced machine tools are used by many industries in Mexico, including the automotive, autoparts, appliance, tools and plastics industries. Large factories operated by multinational corporations are the most important because they are in a better position than smaller firms to invest in imported technology. On the other hand, many of their purchasing decisions are made outside Mexico. For this reason, the larger Mexican-owned manufacturers, especially those which export, are often the best prospects for Canadian suppliers.

Small- and medium-sized enterprises represent a large untapped market that will develop more fully once the economy has stabilized. They are in great need of modernization and are the target of government programs to encourage the rationalization of Mexican industry. In the short term, however, the lack of financing will prevent many of these firms from investing in numerically-controlled (NC) machine tools.

Automotive Industry

The automotive industry is Mexico's second largest source of foreign exchange, after the petroleum sector. The original equipment manufacturers (OEMs) make up an estimated 20 percent of the market for imported machine tools in Mexico.

According to executives of major automobile manufacturers who were interviewed for this profile, their demand for numerically-controlled (NC) machinery has not been severely affected by the devaluation. This is true even though domestic sales have dropped because of price increases brought about by the decline of the peso in December 1994.

Autoparts

The autoparts industry, composed of about 540 firms, accounts for about 15 percent of the numerically-controlled (NC) machine tools market. About two-thirds of autopart manufacturing plants are located in the Mexico City area. Other production centres include Monterrey, Querétaro, Puebla, Toluca and Guadalajara. The largest autoparts firms produce for original equipment manufacturers (OEMs), for *maquiladora* plants and for export. Mexico directly exports about US $500 million worth of autoparts annually.

Hand tools

Black and Decker is the leading company in the hand tools industry. The company exports extensively, and has therefore benefitted from the devaluation. As a result, it continues to import numerically-controlled (NC) tools at pre-devaluation levels and may increase imports in the future. A Black and Decker representative stated that exports in 1996 are expected to increase by between 40 and 70 percent over 1994 levels.

Railways

Ferrocarriles Nacionales de México (FNM), the Mexican national railway, uses machine tools extensively in its maintenance operations. Seven of the company's maintenance centres are in the process of privatization. Mexico's railroad system has seen very little modernization since it was constructed in the late nineteenth century. As a result, the privatization of the system will involve large investments in new equipment and facilities. Canadian firms could conceivably supply machine tools to firms buying concessions from *FNM*, most of which are expected to be foreign.

Metalworking Industry

The metalworking industry consists of some 140,000 manufacturing plants and metalworking shops. These companies are very diverse in terms of size and level of technology. Although some companies use advanced numerically-controlled (NC) production equipment, most continue to rely upon antiquated conventional machine tools. Equipment in small machine shops is generally 15 to 20 years old. This results in quality variations and makes it difficult to comply with strict international standards.

Steel Industry

The Mexican steel industry has undergone drastic changes in recent years. In 1982, the Mexican government began to relax its control over steel production by privatizing more than 50 steel production facilities, converting others to different uses and closing down the least efficient.

Packaging and Bottling Industry

The packaging and bottling industry has around 350 companies. This industry consumes 45 percent of machinery, moulds and dies for plastics manufacture. Packaging is one of the larger users of numerically-controlled (NC) equipment within this industry. However, soft drink bottling is the exception. Representatives of *Grupo Femsa,* which bottles Coca-Cola, said in interviews that very little NC equipment is used in the bottling process.

Home Appliance and Household Products Industries

The manufacture of home appliances and household products requires the shaping of both metals and plastics. There are approximately 60 companies that manufacture electrical consumer goods. Among the most important are General Electric, Koblenz, Black and Decker, Philips, Braun, Motorola, Panasonic, BENDIX, *Crolls Mexicana*, Whirlpool, Hoover, Kenmore, IEM, and *Sunbeam Mexicana.*

Other End-user Industries

Several other industries are also consumers of machine tools and related equipment. They include the plastic furniture industry, with about 90 firms; toys and recreational products, with 400 companies; and the electric-electronics industry, with some 120 manufacturers.

Universities

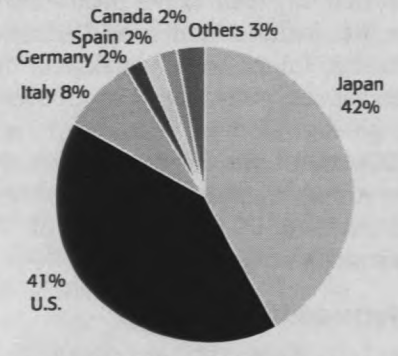
University research centres have played a major role in developing advanced technology applications in Mexican manufacturing. They developed the first industrial automation systems and assisted manufacturing firms in installing practical applications. They are both users and developers of advanced technologies. Universities are usually the best systems integrators because they have access to a range of equipment and software, and also to trained personnel. As well, the fact that they are supported by the government means that they can be cost competitive.

COMPETITION

Competition for sales of machine tools and related products comes almost entirely from foreign suppliers. The principal competitors are the United States, France, Germany, Italy, Spain and Japan. Interviews with industry experts revealed that Canadian products are almost unknown.

Traditionally, imported machine tools have been sold by Mexican distributors, and several companies have specialized in this field. But in recent years, foreign machine tool producers have begun setting up representative offices in Mexico to bypass local distributors. In other cases, customers are placing orders with foreign suppliers directly, using fax and other recently-available electronic communications. Both developments have caused a crisis among Mexican distributors, and some of them have gone out of business.

Import Shares of Numerically-Controlled Metalworking Machine Tools, 1994



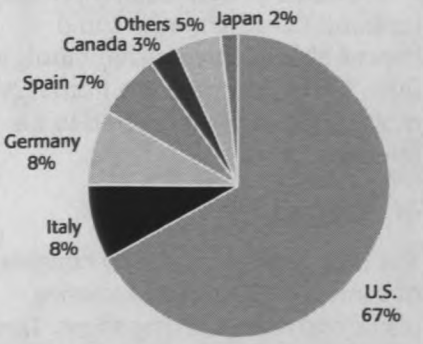
Source: United States Department of Commerce.

Market shares differ markedly for numerically-controlled (NC) and non-NC metalworking equipment. In 1993, Japan had 42 percent of the NC equipment market, but only 2 percent of the conventional machine tools market. Canada's share was very small in both categories, but concentrated in non-NC equipment.

TRENDS AND OPPORTUNITIES

The market for machine tools, moulds, dies, and related equipment has been profoundly affected by the devaluation of the peso which occurred in late December 1994.

Import Shares of Conventional Metalworking Machine Tools



Source: United States Department of Commerce.

The economic crisis has had mixed effects. On one hand, it has increased the need for modernization, because manufacturers must upgrade to participate in booming export markets. On the other hand, it has nearly doubled the price of imported equipment and has pushed interest rates to 80 percent or more annually.

According to representatives of the *Cámara Nacional de la Industria de Transformación (CANACINTRA),* National Chamber of Manufacturing Industry, the devaluation could lead to new investments in numerically-controlled (NC) tools by small- and medium-sized Mexican industries. This is because the reduction of the domestic market makes it essential that firms increase exports in order to survive. But foreign markets are much more demanding in terms of quality standards, and production methods must be updated to meet these requirements. This is particularly true in the autoparts sector, which faces intense international competition.

Product Opportunities

According to market participants interviewed for this profile, the following products are particularly in demand in the Mexican market:

- milling machines with teeth for puncturing and cutting materials
- stamping and moulding machines
- dies
- lathes
- numerically-controlled (NC) tools for the production of autoparts, particularly motor components
- NC injectors for metalworking and plastics
- computer assisted design (CAD) and computer assisted manufacturing (CAM) equipment for the manufacturing sector
- multistation transfer machines for the manufacturing industry
- used NC equipment

In the metalworking field, milling, stamping and moulding machines as well as lathes can be either NC or non-NC. But because of the current low level of technology in the manufacturing industry and the need to modernize, NC equipment is in greater demand. In addition, the market is gradually shifting from unit construction machinery to multistation transfer machines.

Used Equipment

Used refurbished equipment is usually sold through direct contact between buyers and sellers. The periodical *Industria* carries many advertisements for used equipment and from firms seeking particular products. It is common for multinational corporations to transfer used equipment from their facilities in other countries. The capital shortage is the principal force driving this market. Rebuilt equipment is likely to be more acceptable if the seller can offer after-sales service.

Consulting Services

Consulting services for computer assisted design (CAD) and computer assisted manufacturing (CAM) are in particularly high demand, especially in the areas of new programs, technical assistance and training. Many Mexican firms are presently trying to meet the ISO 9000 quality standards. Many see the use of numerically-controlled (NC) tools as part of the solution, and this is creating specific demands for assistance from foreign experts. Canadian companies have a market advantage in professional services. Services differ from physical products in that there is a human element involved that goes beyond price and technical specifications.

THE REGULATORY ENVIRONMENT

Compared with other sectors of the Mexican economy, the market for machine tools is not heavily regulated and there are few barriers to foreign participation. The government is attempting to maintain a register of all industrial machinery and equipment in use in Mexico. For this reason, end users must register all machinery with the *Delegación Federal del Trabajo*, Federal Labour Delegation, which maintains an office in each state. No registration is required for manufacturers, distributors or vendors of machinery.

There are some 300 *Normas Oficiales Mexicanas (NOMs)*, official standards, covering industrial products. Importers of products subject to these standards must have them tested in Mexico and obtain a certificate of compliance prior to importation. The regulations are in a state of constant revision and exporters should verify the requirements with the importer before the goods leave Canada. The requirement for testing to be done in Mexico is being phased out under the North American Free Trade Agreement (NAFTA), and in general, equipment that meets Canadian standards will not face obstacles in Mexico.

MARKET ENTRY STRATEGIES

Canadian companies that have succeeded in Mexico almost always point to the need for a long-term local presence. Mexicans like to do business with people they know, and demonstrated staying power is a key element of market entry. This is especially true for products that are not well-known in Mexico.

Traditionally, an arrangement with a distributor or agent has been the most common method of establishing local presence. Usually, these companies are both importers and distributors, and represent several firms. Distributors usually work through catalog orders, and they normally do not maintain large stocks of tools or spare parts. As a result they have often been unable to provide the service that customers need. Another problem is that used machinery is very seldom handled by distributors.

Financing

Until recently, virtually all sales of imported custom machine tools were done on a cash basis. Increased competition has since forced importers to offer more flexible financing terms. Manufacturers from Germany and Japan have been able to increase their market share at the expense of American manufacturers by offering more attractive financing packages. Almost all sales of machine tools now include some sort of financing through the manufacturer in order to avoid the high cost of raising capital in Mexico.

Trade Shows

As in other sectors, trade shows are a popular way to introduce equipment and to meet potential clients and prospective partners. Typically, machine tools and related equipment are shown at trade shows focussing on particular user industries. The following shows usually include participation from machine tool manufacturers:

- *Electric México*. The first annual Mexican Conference and Exhibition on the Electronics Industry was held in September 1995 at the World Trade Centre in Mexico City.
- *Exposición Nacional Ferretera*. The Seventh Annual National Hardware Exhibition was held in Guadalajara, September 1995.

- *Expo Cihac.* The annual Construction and Housing Industry Exhibition was held at the World Trade Centre in Mexico City, October 1995.
- Plastics USA. This annual plastics trade show, held in Chicago, is sponsored by the Society of the Plastic Industry and is attended by many Mexican plastics manufacturers. The 1995 show was held in September.
- *Maquinamex y Metalmex.* A machine tools international exposition was held in 1994, at the World Trade Centre in Mexico City. It was organized by the *Asociación Mexicana de Distribuidores de Maquinaria (AMDIMA),* Mexican Association of Machinery Distribution.

The best source found for information on upcoming trade shows is the periodical *Industria.*

KEY CONTACTS

CANADA

Canadian Government

Department of Foreign Affairs and International Trade (DFAIT)

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

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

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.*

Commercial Division
The Embassy of Canada in Mexico
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Fax: 724-7982

Canadian Consulate
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Zaragoza y Constitución
64000 Monterrey, Nuevo León
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Tel.: 344-3200
Fax: 344-3048

Canadian Consulate
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Local 30-A
Aurelio Aceves No. 225
Col. Vallarta Poniente
Guadalajara, Jalisco
México
Tel.: 616-6215
Fax: 615-8665

International Trade Centres have been established across the country as a convenient point of contact to support the exporting efforts of Canadian firms. The centres operate under the guidance of DFAIT and all have resident trade commissioners. They help companies determine whether or not they are ready to export, assist firms with market research and planning, provide access to govemment programs designed to promote exports, and arrange for assistance from the trade commissioners in Ottawa and trade officers abroad. Contact the International Trade Centre nearest you.

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

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

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

Department of Industry

Automotive Branch
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Regional Office
1 Front Street West, Fourth Floor
Toronto, ON M5J 1A4
Tel.: (416) 973-5167
Fax: (416) 973-5131

Canadian International Development Agency (CIDA)

CIDA is an important possible source of financing for Canadian ventures in Mexico. A special fund is available through the CIDA under the Industrial Cooperation Program (CIDA/INC). This program provides financial contributions to stimulate Canadian private-sector involvement in developing countries by supporting long-term business relationships such as joint ventures and licensing arrangements. For more information, call (819) 997-7905/7906, or fax (819) 953-5024.

Export Development Corporation (EDC)

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

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

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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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The Canadian Chamber of Commerce
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Forum for International Trade and Training Inc.
155 Queen Street
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MEXICO

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National Association of the Computer Programming Industry
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Tel.: 663-3510/662-3632
Fax: 662-5880

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