MARKET STUDY ON THE MEXICAN MARKET FOR

MATERIALS HANDLING EQUIPMENT

This market study has been prepared to assist Canadian firms interested in exporting to Mexico. While an effort has been made to examine the most important aspects of the sector, the study is not exhaustive. Companies will have to tailor their marketing approach according to their particular interests and circumstances.

Further assistance can be obtained by addressing requests directly to the Commercial Division of the Canadian Embassy in Mexico City located at Calle Schiller No. 529, Col. Polanco, 11580 Mexico, D.F., telephone (011-525) 254-3288, telex 177-1191 (DMCNME) and fax (011-525) 545-1769 (sending from Canada); or the Latin America and Caribbean Trade Division, External Affairs and International Trade Canada, 125 Sussex Drive, Ottawa, Ontario, K1A 0G2; phone (613) 996-8625; fax (613) 943-8806.

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1. BACKGROUND

Following Mexico's accession to GATT in 1986, the Mexican Government has undertaken a major trade liberalization program, which has already brought about the elimination of the very restrictive prior import permit requirement on all but 198 items and the reduction of import duties, and which will eventually lead to the Free Trade Agreement between Mexico the United States and Canada. This, coupled with a growing economy, makes the Mexican market very attractive to foreign exporters wishing to take advantage of new opportunities in Mexico.

The total market for materials handling equipment has been increasing steadily in the past three years in response to the growth experienced by the economy as a whole. Total apparent consumption grew from $190.6 million in 1988 to $222.3 million in 1989 and $253.7 million in 1990. Demand is expected to continue increasing at an average annual rate of 4%, following the upward trend in the Mexican economy and, in particular, the estimated growth in the largest end user sectors. Total demand is expected to reach $286 million in 1994. Imports, which now represent 51% of the total market, are expected to grow at a faster rate than local production and amount to $190 million in 1994.

Materials handling equipment is used in a large variety of sectors. All industrial and commercial plants and establishments use one type or another of materials handling equipment. Based on trade interviews, the largest end user sectors identified were the following industries: petroleum, electric energy, telecommunications, transportation, mining, steel, construction, cement, automotive, food and beverages and commercial establishments.

2. ECONOMIC ENVIRONMENT

With the objective of reducing the inflation rate, the Mexican authorities implemented a stabilization program in 1988, called the Economic Solidarity Pact, which features traditional austerity measures, entailing tight fiscal and monetary policies and unorthodox measures, such as price, wage and exchange rate controls. This program has been the cornerstone of Mexico's economic policy over the past four years and has resulted in a drastic reduction of the inflation rate, from an annual rate of 159.2% in 1987 to 51.7% in 1988 and 19.7% in 1989. Inflation rebounded to 29.9% in 1990 but the Mexican government aims to achieve a 14% inflation rate in 1991, which seems a reasonable estimate based on an annual inflation rate of 13.3% as of October 1991. Along with the objective of consolidating the progress made in price stabilization, Mexico's macroeconomic policy in the short run aims to reaffirm gradual and sustained economic recuperation, basically by establishing the necessary conditions to encourage national and foreign investment and by stimulating local demand.

After the 1986 recession, Mexico's gross domestic product (GDP) increased a moderate 1.7% in 1987 and an additional 1.3% in 1988. Domestic economic activity recovered for the third consecutive year in 1989 with a growth rate of 3.1% and further 3.9% in 1990 to reach $234 billion (1). With an 81.1 million population, per capita GDP was estimated at $2,874 in 1990. Additionally, manufacturing output grew by 5.2% in 1990 in real terms, private investment and consumption expanded 13.6% and 5.2% respectively and public investment was up 12.8%. During the 1991-1994 period GDP is expected to maintain an average annual growth rate of 2.5%-3%. Preliminary figures for 1991 place GDP growth at 4.5%-5% for this year.

In an effort to revitalize and open the Mexican economy, the Mexican Government undertook a series of structural changes, including the accession to the General Agreement on Tariffs and Trade (GATT) on August 24, 1986 leading to an extensive trade liberalization process: import permits were eliminated on all but 198 of the total 11,812 tariff items based on the Harmonized System adopted in 1988. Official import prices are no longer applicable, nor the 5% export development tax, and import duties were lowered from a maximum of 100% in 1982 to 20% since January 1988. The weighted average tariff rate is now 10.4%. The automotive and computer industries have also been liberalized, through the elimination of prior import permits, to allow free entry of products in these industries. The approval of the North American Free Trade Agreement will further strengthen trade between Canada, the United States and Mexico.

According to official data from the Mexican Secretariat of Commerce and Industrial Development (SECOFI), Mexico's trade balance in 1990 dropped once again to a $3 billion deficit from -$645 million in 1989. Exports increased by 17.5% in 1990, from $22.8 billion to $26.8 billion, while imports grew 27.3%, from $23.4 billion to $29.8 billion in 1990, having already increased 23.8% in 1989 and 54.9% in 1988. As of August 1991, total exports for the year amounted to $18.3 billion and imports to $23.6 billion.

Total Mexican imports from Canada increased 24% in 1989 and decreased 1.5% in 1990. Total Canadian exports to Mexico amounted to Cdn$594 million in 1990, while total Canadian imports from Mexico were valued at Cdn$1,730 million. According to Mexican figures, in 1989, 1.9% of Mexico's imports came from Canada, while 1.2% of its exports were to Canada. This makes Canada Mexico's fifth largest exporter and sixth largest importer.

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1. Note: All values in this report, unless otherwise stated (Mexican pesos, Mex$, Canadian dollars, Cdn$, etc) are quoted in United States dollar equivalents.

3. MARKET ASSSESSMENT

Total apparent consumption of materials handling equipment has been increasing steadily in the past three years in response to the growth experienced by the economy as a whole. Total apparent consumption of materials handling equipment reached $253.7 million in 1990 after growing 14.1% in 1989 and 16.6% in 1988 (see Table 1). This was the result of several factors, the most important of which were the expectation of a further growing economy, reduced inflation rates and a steady exchange rate; Mexico's trade liberalization process; and the demand backlog brought about by several years of economic recession. The market is expected to grow only slightly in 1991, if at all, because many companies have by now substitued their old or obsolete equipment and therefore the demand backlog has almost been satisfied; and because the mining industry, one of the key end user sectors for this type of equipemnt, has not grown as expected due to low prices of mining products.

TABLE 1
TOTAL APPARENT CONSUMPTION OF MATERIALS HANDLING EQUIPMENT
(U.S.$ million)

	1988	1989	1990	1991e	1994p
Production (2)	127.0	179.5	130.3	132.5	140.6
+ Imports (1)	90.8	130.5	158.2	164.5	190.4
- Exports (1)	27.2	87.7	34.8	42.7	46.7
TOTAL	**190.6**	**222.3**	**253.7**	**254.3**	**284.3**

Source:
(1) Based on import-export data published by SECOFI
(2) Own estimates based on trade interviews

Demand will continue increasing, at an estimated annual real rate of 4%, following the general trend in the Mexican economy and, in particular, the expected growth in the largest end user sectors described below. Total demand is expected to reach $284.3 million in 1994. Imports are expected to grow at a faster rate than local production, following the trend observed in the past three years, as a result of Mexico's trade liberalization policies and the Free Trade Agreement negotiations presently under way. Much of the growth in local production is expected to be channeled towards exports, which will start playing an increasingly significant role, as local demand begins to stabilize and be more import-oriented.

3.1 IMPORTS

Imports have experienced very significant growth rates, increasing 43.7% in 1989, from $90.8 million in 1988 to $130.5 million in 1989, and further 21.2% in 1990, to $158.2 million. They are expected to increase again in 1991, to $162.5 million and follow an annual real growth path of 5% in the following three years. This is considered a very conservative estimate, based on the expectation of a growing economy. It is quite possible, however, that imports will continue to increase 10% annually, if the present trend in the substitution of local production by imports continues and with the comming into effect of the Free Trade Agreement.

The following table shows imports of materials handling equipment by category for the 1988-1990 period.

TABLE 2
IMPORTS OF MATERIALS HANDLING EQUIPMENT
(U.S.$000)

CATEGORY	1988	1989	1990
Pulley tackle & hoists	2,548	4,155	4,396
Winches for underground use	1,071	1,281	907
Other winches & capstans	1,400	2,744	4,468
Jacks & hoists	5,342	7,681	7,240
Derricks & cranes	21,339	13,421	16,705
Fork lift trucks & other trucks fitted w. handling eq.	10,182	24,488	37,220
Lifts & skip hoists	757	2,325	2,360
Pneumatic elevators & conveyors	3,041	17,812	5,055
Continuous elevators & conveyors	15,453	22,296	37,182
Escalators & moving walkways	4,366	1,915	4,323
Other materials handling eq.	11,417	13,287	13,845
Parts for materials handling eq.	13,921	19,113	24,517
TOTAL	**90,837**	**130,518**	**158,218**

Source: Based on import data published by SECOFI

By far, the largest foreign supplier of materilas handling equipment to Mexico is the United States with an overall import market share of 71.7% in 1990. The U.S. share of the import market has actually been increasing in the past three years, from 57.6% in 1988, to 64% in 1989 and further to 71.7% in 1990. American companies are well known in the Mexican market because they have established a longstanding presence in Mexico through local agents and distributors, as well as through licensing agreements with local firms for the production or assembly of products under American brand names. U.S. products in this sector are viewed as following high quality standards and incorporating the latest technology; and prices of American-made products are competitive both with locally-made equipment and with those of third country suppliers. These factors, together with geographical proximity, have determined the leading position of American suppliers in the Mexican market.

Third country suppliers have been losing some ground before American companies but many of them have also established a longstanding presence in Mexico, in particular Germany with a 9.3% import market share (mobile stanchions, conveyors with a measuring device and belt type conveyors), Japan 4.9% (fork lifts), Italy 3.7%, Brazil 1.6% (skip hoists without gearing) and Sweden 1.3% (cranes).

The following table lists Canadian exports to Mexico and Canadian imports from Mexico of materials handling equipment.

TABLE 3

CANADIAN TRADE OF MATERIALS HANDLING EQUIPMENT WITH MEXICO

(Cdn $000)

	EXPORTS TO MEXICO			**IMPORTS FROM MEXICO**		
	1988	**1989**	**1990**	**1988**	**1989**	**1990**
Jacks & hoists	17	38	442	26	2	0
Derricks & cranes	90	56	0	0	0	0
Fork-lift trucks	70	0	0	959	4,947	2,636
Lifts & escalators	136	958	262	0	0	0
Parts	17	1,564	777	474	149	1,200
TOTAL	**330**	**2,616**	**1,481**	**1,459**	**5,098**	**3,836**

Source: Statistics Canada - Internationl Trade Division

Canada exports continuous action conveyors for goods, some jacks and hoists, other lifting and handling equipment and occasionally teleferics. Mexico, on the other hand, exports mostly fork-lift trucks and parts thereof. Canada's exports to Mexico are relatively small compared to those of other countries and they have also fluctuated significantly, from Cdn$330,000 in 1988, to Cdn$2.6 million in 1989 and Cdn$1.5 million in 1990, reflecting the lack of a constant presence in the Mexican market. Mexican imports from Canada are most often than not one time purchases rather than an ongoing commercial relationship. It is therefore important that Canadian manufacturers be more aggressive in the Mexican market.

The most important competitive factors determining sales of materials handling equipment in Mexico are: service, price, quality, state-of-the-art technology, longstanding presence in the Mexican market, reputation and promotion. In order to improve their competitive position, Canadian companies can participate in major trade shows and technical seminars as an inexpensive and effective means to maintain a market presence in Mexico. Having an active distributor and/or representative is also an important marketing factor. Visits to major end users, as well as media advertising can also contribute to sales. Joint venture agreements with local entrepreneurs can become a very successful means to penetrate the market.

Some of the most important foreign companies represented in Mexico include:

Allis Chalmers	Link Belt
Carrier Vibrating Equipment	Long Reach
Clark	L.S.I. Rapistan
Columbus McKinon	Marubeni
Crosby	Michigan
Daifuco	Mitsubishi
Demag	Munck
Fassi	National Crane
Grove Worldwide	P & H
Harnishfeger	Pettibone
Hiab Foco	Telelect
Kalmar	Terex
Komatsu	Toyota
Kone	Whiting
Kranco	Yale

3.2 DOMESTIC PRODUCTION

Local production of materials handling equipment amounted to an estimated $130.3 million in 1990. It presently represents 38% of total apparent consumption (see Table 1), down from 52% in 1988. This has been the result of several factors: A major increase in imports, which has displaced some of the locally produced equipment; the reorientation of small and some medium sized companies towards distributing imported products rather than producing them; and a new awareness towards export markets for Mexican-made products, which has channelled an increasing volume of production towards international rather than local markets.

Local production is highest in the segment of conveying equipment, which was reported to be all locally manufactured, except specialized products such as vibrating conveyors, among others. Cranes sold in Mexico are, on average, 50% locally made and 50% imported. Hoists are also imported in their majority. In the case of fork lifts, approximately 70% are of imported origin.

All large producers of materials handling equipment in Mexico are joint ventures with foreign companies. In most cases, much of the production process consists of assembling imported components, which represent approximately 40% of total inputs. Following are some of the Mexican firms with their foreign affiliation:

A.C. Mexicana	Allis Chalmers	U.S.
ICA	Link Belt	U.S.
Hércules	P & H	U.S.
Kone Cranes	Kone	Finland
Hiab Foco	Hiab Foco	Sweden

4. END USERS

Materials handling equipment is used in a very large variety of sectors. All industrial and commercial plants and establishments use one type or another of materials handling equipment. Based on trade interviews, the largest user sectors were identified and are summarily described below.

The government, including all state-owned companies (estimated at close to 400), is the largest single end user sector for materials handling equipment. The most significant government agencies are:

- Petroleos Mexicanos (PEMEX) is the national oil monopoly, a decentralized agency owned directly by the State. Its activities include the exploration, production and distribution of crude oil; refining and distribution of gasoline and oil products; production and distribution of petrochemicals. PEMEX is ranked the number 36 corporation in the world among "Fortune 500" companies, as measured by its sales of $18.7 billion during 1990. It is the largest enterprise in Latin America and employs over 250,000 people. PEMEX operates 82 exploration and development wells, 129 refining plants, 106 petrochemical plants, 59,000 kilometers of pipelines, in addition to tanks, ships, helicopters and ports.

- Comisión Federal de Electricidad (CFE) is the country's sole generator of electricity and is the second largest government owned company after PEMEX and it employs 126,000 people. It has an installed capacity of 25,300 MW, a gross generation of electric energy of 107,000 GWH and electric energy sales of 85,000 GWH. Steam plants account for 45% of total installed capacity, hydroelectric plants for 30%, and coal electric plants for 5%, while combined cycle, nuclear and turbogas plants account for the balance. CFE has a total of 13 divisions and 100 coordinating offices throughout the country, and it is administratively divided into seven thermoelectric regions and five hydroelectric regions.

- Teléfonos de México (TELMEX) is Mexico's telephone company, which was recently privatized, although the state still holds 30% of its shares. Its sales in 1990 amounted to $4 billion with investments of $1.4 billion. TELMEX presently has 5.2 million lines and it plans to install another 2.3 million by

1993. During 1990 it processed 951 million local long distance calls and 160 million international long distance calls.

- The transportation sector, including air, sea, railroads and roads uses a variety of materials handling equipments. There are a total of 78 national and international airports, which serviced close to one million flights with 9.2 million national passengers and 8.6 million international passengers in 1990. Mexico has 76 sea ports and nine river ports, whith a total dock length of 73,000 meters, where an average 170 million tons of cargo is handled annually. The railroad network consists of 20,000 miles and annual transportation is of 70 million tons of cargo and 25 million passengers. Mexico's highway network consists of 55,000 miles of paved roads, with a total circulation of over 100 million vehicles per annum.

- The mining industry was reported as one of the largest end users of materials handling equipment, in particular of heavy equipment. It consists of over 6,000 mining enterprises, of which 144 are considered large and account for 82% of Mexico's mining exports. The remainig companies are either small or medium sized and basically supply local demand. State majority owned companies still play a major role in this industry, but the massive sale of government owned companies will lead to state control of only five companies, mining minerals considered strategic: iron, coal, sulphur, phosphorous and potasium. Mexico holds first place in world production of several metals and minerals: first place in production of silver, bismuth, celestine and sodium sulphate; second in barite; third in antimony, fluorite and graphite; fourth in mercury; and fifth in cadmium, arsenic and molybdenum. Mexico's production of non-ferrous industrial metals was 812,000 in 1990 compared to 711,000 tons in 1989, that of steel related metals 12 million tons, and that of non-metallic minerals 15.4 million tons in 1990.

- The steel industry tends to use very large and heavy equipment. Mexico's steel industry is composed of four large, fully integrated manufacturers, which cover all five basic production processes: concentration of iron ore and production of coke; production of primary iron or fusion; production of pig and sponge iron; production of steel; and production of final products. These companies are the government owned SIDERMEX complex (Altos Hornos de México AHMSA and Siderúrgica Lázaro Cárdenas - las Truchas SICARTSA) and the private owned Hojalata y Lámina (HYLSA) and Tubos de Acero de México (TAMSA). These together produced close to eight million tons of steel in 1990 and they account for 86% of total production by the industry and 65% of employment. Additionally, there are 23 semi-integrated firms and 44 mill rollers with a total installed capacity of 11.6 milion metric tons.

- The construction industry is a major user of materials handling equipment of all types and sizes. This industry consists of approximately 15,000 companies employing 1.4 million workers. Total production by this industry is valued at close to $5 billion, with private and public construction projects accounting for 60% and 40% respectively. Construction projects are concentrated in industrial construction, communications, housing, utilities and municipal services. Major investments are being undertaken since 1991 in the construction of roads. The public sector is expected to invest $1.1 billion and the private sector $2 billion in this project.

- The cement industry uses a wide variety of materials handling equipment. It presently consists of over 30 plants concentrated in a relatively small number of large producers, ten of which are among the country's 500 largest companies: Cementos Mexicanos, Cementos Tolteca, Cementos Guadalajara, Cementos Apasco, Cementos de Veracruz, Cementos de Chihuahua, Concretos Apasco, Cementos Tolteca, Latinoamericana de Concretos and Tubos DYSA. These companies together reported sales of one billion dollars in 1990. Total installed capacity is estimated at 30 million tons and the cement companies have projects to expand this capacity by 35% in the next four years.

- The automotive industry is a large user of materials handling equipment, and in particular of conveying equipment. This industry is concentrated in a small number of large firms, which together operate 15 plants, 10 of which are American, three Japanese and two German. Total production of cars reached 274,500 in 1989 and that of trucks 167,409. The largest car manufacturers are Volkswagen (28%), Nissan (25%), Chrysler (21%), Ford (17%) and General Motors (8%). These companies also manufacture trucks, in addition to Dina, Famsa, and Kenmex.

- The food and beverages industry accounts for 6.5% of the country's total GDP, or an estimated $15 billion. It is one of Mexico's most steadily growing sectors, since it satisfies the most basic needs of the country's growing population of over 80 million. This industry can be divided into the following large categories, listed in order of importance: Meat and dairy products, corn grinding, wheat grinding, soft drinks, coffee, beer and malt, tobacco, sugar, oils and fats, alcoholic beverages, preserved fruits and vegetables, and animal feed. The government participates in the production, purchase and industrial transformation of food products, as well as in distribution, transportation and storage through the National Company for Popular Subsistence (CONASUPO)

- Commercial establishments represent approximately 56% of all registered firms in Mexico. They employ 29% of the total working population and generate 24% of the country's GDP valued at $234 billion in 1990. Of total firms, 95% are retail outlets (some 400,000) and only 5% are wholesalers. A large majority of enterprises are small family operations, but the large supermarket and department store chains account for the majority of sales. The three largest supermarket chains are CIFRA (Aurrerá, Superama and Suburbia stores) with 116 stores and $1.7 billion in 1990 sales; Gigante with 96 stores and $1.4 billion sales and Comercial Mexicana (Comercial Mexicana and Sumesa) with 108 stores and sales of $1.2 billion. The three most significant department store chains are Soriana ($460 million in sales), Liverpool ($650 million in sales), Palacio de Hierro ($203 million in sales) and Coppel (($139 million sales).

5. MARKET ACCESS

As a result of Mexico's accession to GATT, the Mexican government has gradually opened the economy to international markets. Tariffs have been lowered from a maximum 100% in 1983, to 20% since December, 1988. The official price system has been totally eliminated and import permits are required on only 198 of the total 11,812 items in the Mexican Harmonized Tariff System.

The import climate for materials handling equipment has improved significantly as a result of this commercial liberalization. Maximum duty rates have been reduced to 20% and prior import permits are only required on imports of parts for switchboards and modems. Therefore, imports of equipment withing this market study are subject to an ad valorem duty of maximum 20% assessed on the invoice value. In addition, a customs processing fee of 0.8% is assessed on the invoice value. A 10% value added tax (recently reduced from 15%) is then assessed on the cumulative value of both taxes in addition to the invoice value. Some manufacturers who use imported inputs for their products under a Mexican Government approved manufacturing plan may have the duty and/or VAT waived or rebated. Raw materials, intermediates and machinery for use in manufacturing or assembling products for export are generally eligible to be imported either duty free or under bond.

The following list includes the most commonly imported items in this subsector with their Harmonized System Code and the import tariff rate applicable as of November 1991.

HARMONIZED SYSTEM NBR.	**DESCRIPTION**	**DUTY RATE**
8425.1199	Pulley tackle and hoists	20%
2003	Winding gear & winches for fork lifts	15%
3101	Winches with a capacity under 5000 tons	20%
3102	Winches with a capacity over 5000 tons	15%
3901	Winches for skip hoists without gearing	10%

3902		Winches for skip hoists with gearing	15%
3999		Other winches & capstans	20%
4101		Built-in jacking systems for garages	20%
4202		Runner type jacks & hoists	20%
4203		Bottle type jacks & hoists	20%
4901		Mechanical jacks	20%
8426.	1101	Overhead travelling cranes	15%
	2001	Tower cranes	10%
	3001	Portal jib cranes	15%
	4101	Mechanical lattice cranes on tyres	15%
	4102	Hydraulic cranes with rigid jibs on tyres	15%
	4999	Other mast cranes or with rigid jibs	15%
	9102	Hydraulic rigid or articulated jib cranes with a capacity of 9.9 to 30 tons	15%
	9103	Skip type elevator cranes under 1 ton	15%
	9104	Articulated boom cranes over 9.9 tons	10%
	9904	Mobile stanchions	20%
8427.	1001	Electric motor trucks loading uner 3,500 kg	20%
	2001	Internal comb.engine trucks load. under 7000	20%
	2002	Internal comb.engine trucks load. over 7000	10%
	9099	Other trucks or fork lift trucks	20%
8428.	1001	Lifts and skip hoists	20%
	2003	Elevators & conveyors w. a measuring device	20%
	2099	Other pneumatic elevators & conveyors	10%
	3101	Continuous conveyors for underground use	15%
	3301	Belt type conveyors for underground use	10%
	3999	Other conveyors	10%
	4001	Escalators	20%
	9003	Self-propelled transporter-loaders	10%
8431.	1099	Parts for hoists, winches and jacks	10%
	2099	Parts for trucks and fork lift trucks	15%
	3101	Parts for lifts & escalators	10%
	3199	Parts for conveyors	10%

Formerly, in order to bid on tenders and sell to a government agency or decentralized company, foreign manufacturers required having a local resident agent and to have the foreign supplier registered and accepted by the Secretariat of Planning and Budgeting (Secretaría de Programación y Presupuesto - SPP). As of July 1991, the above requirement for prior registration with SPP has been eliminated.

The new procedures now in force require the foreign supplier to have a local agent or representative and it has to be registered through his local representative as an accepted supplier with each government ministry and/or decentralized agency according to the international tender requirements under review.

International tenders financed by the World Bank or the International Development Bank are open to all member countries of these institutions. More recently, the World Bank, where its credits are involved, has required that bid documents should also include an affidavit confirming that the Canadian company is a bona fide Canadian company with an official residence in Canada and that Canada is recognized as a contributing member to the World Bank.

There are no official metric requirements applicable to imports into Mexico. However, since the metric system of units is, by law, the official standard of weights and measures in Mexico, importers will usually require metric labeling for packaged goods, although the English system is also used. Dual labeling is acceptable. Imported products should be labeled in Spanish containing the following information: name of the product, trade name and address of the manufacturer, net contents, serial number of equipment, date of manufacture, electrical specifications, precautionary information on dangerous products, instructions for use, handling and/or product conservation and mandatory standards. Mexico adheres to the International System of Units (SI). Electric power is 60 cycles with normal voltage being 110, 220 and 400. Three phase and single phase 230 volt current is also available.

Prepared by:
Caroline Vérut for the
Canadian Embassy
Mexico City
November 1991

APPENDIX I:
INDUSTRIAL CHAMBERS AND ASSOCIATIONS

To call all telephone and fax numers listed below (unless preceded by a different area code) from Canada, dial 011-525 first.

ASOCIACION MEXICANA DE LA INDUSTRIA AUTOMOTRIZ
AUTOMOBILE INDUSTRY
Ensenada 90
Col. Condesa
06140 México D.F.
Tel. 515-2542
Fax 272-7139
Contact: Lic. César Flores - President

ASOCIACION NACIONAL DE IMPORTADORES Y EXPORTADORES DE LA REPUBLICA MEXICANA
IMPORTERS AND EXPORTERS
Monterrey 130
Col. Roma
06700 México D.F.
Tel. 584-9522
Fax 584-5317
Contact: Sr. Ernesto Warnholz

ASOCIACION NACIONAL DE TIENDAS DE AUTOSERVICIO Y DEPARTAMENTALES
SUPERMARKETS AND DEPARTMENT STORES
Homero 109 piso 11
Col. Polanco
11560 México D.F.
Tel. 254-6220
545-8803
254-1714
Fax 203-4495
Contact: Sr. Juan Manuel Ley López - President

CAMARA MINERA DE MEXICO
MINING CHAMBER
Sierra Vertientes 369
Col. Lomas de Chapultepec
11000 México D.F.
Tel. 540-6788
540-6990
Fax 540-6061
Contact: Ing. Jaime Lomelín - President

CAMARA NACIONAL DEL CEMENTO
CEMENT CHAMBER
Leibnitz 77
Col. Anzures
11590 México D.F.
Tel. 533-2400
533-0132
Fax 203-4102
Contact: Ing. José Domene Zambrano - President

CAMARA NACIONAL DE LA INDUSTRIA DE LA CONSTRUCCION
CONSTRUCTION INDUSTRY
Periférico Sur 4839
Col. Parques del Pedregal
14010 México D.F.
Tel. 665-0424 665-3392
665-4245 665-2167
Fax 606-6720
606-8329
Contact: Ing. Carlos Cárdenas Villalobos - President

CAMARA NACIONAL DE LA INDUSTRIA DEL HIERRO Y DEL ACERO
IRON AND STEEL
Amores 338
Col. del Valle
03199 México D.F.
Tel. 543-4443
Fax 687-0517
Contact: Ing. Felipe Cortés - President

CAMARA NACIONAL DE LA INDUSTRIA DE TRANSFORMACION (CANACINTRA)
TRANSFORMATION INDUSTRY
Av. San Antonio 256
Col. Ampliación Nápoles
03849 México D.F.
Tel. 563-3400
Fax 598-9467
Contact: Roberto Sánchez de la Vara - President

CAMARA NACIONAL DE TRANSPORTES Y COMUNICACIONES
COMMUNICATIONS AND TRANSPORTATION
Pachuca 158 bis
Col. Condesa
06140 México D.F.
Tel. 286-1651
286-1641
Fax 286-4512
Contact:

APPENDIX II:
USEFUL GOVERNMENT MINISTRIES AND AGENCIES

COMISION FEDERAL DE ELECTRICIDAD
FEDERAL ELECTRICITY COMMISSION
Río Ródano 14
Col. Cuauhtémoc
06598 México D.F.
Phone: 553-71-33 553-64-00
Fax: 553-64-24

Ing. Guillermo Guerrero Villalobos
Director General
Phone: 553-65-00

Ing. Celestino Cázares Lazcano
Gerente Administrativo
(Responsable de Adquisiciones)
Melchor Ocampo 171 Piso 8
Col. Tlaxpana
11379 México D.F.
Phone: 546-79-58

COMPAÑIA NACIONAL DE SUBSISTENCIAS POPULARES (CONASUPO)
GOVERNMENT FOOD COMPANY
Av. Insurgentes Sur 489
Col. Hipódromo Condesa
06100 México D.F.
Phone: 271-10-00 271-11-31

Lic. Javier Bonilla García
Director General
Piso 4
Phone: 272-26-14 272-04-72

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Director de Operaciones
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Juan Manuel Ramírez

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