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Market study on the Mexican market
for home and office furniture
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MARKET STUDY ON THE MEXICAN MARKET FOR

HOME AND OFFICE FURNITURE

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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MARKET STUDY ON THE MEXICAN MARKET

FOR HOME AND OFFICE FURNITURE

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1. BACKGROUND

Mexican imports of consumer products have increased dramatically in the past four years as a result of Mexico's trade liberalization policies, which in 1988 reduced all import duties and allowed the importation of many items previously protected by prior import permit requirements. These measures had a particularly strong effect on consumer products because these were protected by the highest duties and by more import permit requirements. Total imports of consumer goods increased by 82.1% in 1989, 44.4% in 1990 and another 10.6% in 1991. Consumer products, which in 1988 represented 10.2% of total imports, increased their participation to 14.9% in 1989, 16.3% in 1990 and then fell to 14.8% in 1991.

As can be seen, the upward trend is decreasing, as the first boom passed and is giving way to a more stable growth pattern. The Mexican consumer is very much influenced by the U.S. market, and many Mexicans have at least been to Mexico-U.S. border communities and are familiar with U.S. consumer products. This created an attraction towards imported products, which was further reinforced by the fact that these items were not available in Mexico, since their importation was either prohibited or non competitive. Therefore, when the importation was liberalized, this created a short term boom. Slowly this indiscriminate sale of imports has given way to more reasonable purchasing programs, mostly based on a close relationship between local chains and major foreign distributors or representatives. The consumer is no longer favoring imports over locally made items only because they are imported, but shops for a price and quality balance. Brand and company names are also now being recognized and related to particular features.

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 recently been extended to January 1993. It has resulted in a drastic reduction of the inflation rate, from an annual rate of 159% in 1987 to 19.7% in 1989. Inflation rebounded to 29.9% in 1990 but was brought down to 18.5% in 1991 and is expected to be of 10% to 12% in 1992. At the same time, interest rates have fallen substantially to the present 17%, and the peso-dollar devaluation rate has been set at Mex\$0.2 pesos a day or 2.4% per annum.

Along with the objective of consolidating the progress made in price stabilization, Mexico's macroeconomic policy in 1992 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,

and to strengthen the improvement in living standards of the poorest segment of society through the Solidaridad program.

Domestic economic activity recovered for the third consecutive year in 1989, after the 1986 recession, with a gross domestic product (GDP) growth rate of 3.1%. In 1990 it grew 3.9% and another 3.6% in 1991 to reach \$280.3 billion (1). With an 82.8 million population, per capita GDP was estimated at \$3,385 in 1991. Additionally, manufacturing output grew by 5.2% in 1990 and 3% in 1991 in real terms, private investment and consumption expanded 13.6% and 5.2% respectively and public investment was up 12.8%. During the 1992-1994 period, the GDP is expected to maintain an average annual growth rate of 4%-5%. Preliminary figures place GDP growth at 4% for 1992.

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 325 of the total 11,950 tariff items based on the Harmonized System adopted in 1989. 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% in 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 dropped once again in 1991 to a \$10.4 billion deficit from -\$3 billion in 1990. Exports increased by 2.6% in 1991, from \$26.8 billion to \$27.6 billion, while imports grew 22.2%, from \$29.8 billion to \$38 billion in 1991, having already increased 27.2% in 1990 from \$23.4 billion in 1989.

3. MARKET ASSESSMENT

The total Mexican market for office and household furniture and lighting fixtures amounted to \$435.4 million in 1988 and increased by 24% in 1989 in response to the economic recovery and the increase in disposable income as inflation fell. In 1990, the market grew again by 12% to \$605 million in 1990, prompted by a 36.8% increase in imports and a 6% increase in local production (see Table 1). During 1991, demand increased an estimated 6% and reached \$642.2 million. The total market for office and household furniture and lighting fixtures is expected to grow at an average

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

annual rate of 5% and total \$741.7 million in 1994. Imports are expected to grow at a faster pace than domestic production, and increase their market participation from 8.6% in 1988 to 22.3% in 1994.

TABLE 1
APPARENT CONSUMPTION OF
FURNITURE AND LIGHTING FIXTURES
 (U.S.\$ million)

| | 1988 | 1989 | 1990 | 1991e | 1994p |
|--------------|--------------|--------------|--------------|--------------|--------------|
| Production | 450.2 | 508.7 | 539.2 | 560.8 | 630.8 |
| + Imports | 37.5 | 85.8 | 117.4 | 131.5 | 165.6 |
| - Exports | 52.3 | 54.5 | 51.6 | 50.1 | 54.7 |
| TOTAL | 435.4 | 540.0 | 605.0 | 642.2 | 741.7 |

Source: Import-export data published by Secretaría de Comercio y Fomento Industrial (SECOFI); production figures based on data by Instituto Nacional de Geografía, Estadística e Informática (INEGI).

Total apparent consumption for 1990 can further be divided into the following categories:

TABLE 2
1990 APPARENT CONSUMPTION BY SECTOR
 (U.S.\$000)

| CATEGORY | VALUE | % OF TOTAL | IMPORT SHARE |
|---------------------------|--------------|--------------|--------------|
| Metal furniture | 179.2 | 29.6% | 17.8% |
| Wood furniture | 152.2 | 25.2 | 33.2% |
| Bedding | 109.2 | 18.0% | 4.0% |
| Lamps & lighting fittings | 102.2 | 16.9% | 20.8% |
| Furniture other materials | 62.2 | 10.3% | 10.1% |
| TOTAL | 605.0 | 100.0 | 19.4% |

The largest segment of this market is metal furniture, dominated by the demand for office furniture, such as filing cabinets, desks and chairs, which accounted for \$179.2 million, wood furniture, mostly home furniture including tables, chairs, cabinets, bookcases and sofas, which amounted to \$152.2 million; mattresses, box springs and other bedding totalled \$109.2 million, lighting fixtures \$102.2 million and plastic and other furniture \$62.2 million.

3.1 Imports

As is shown in Table 1, while imports only represented 8.6% of total apparent consumption in 1988, or \$37.5 million, by 1990 they accounted for 19.4% of total consumption and were valued at \$117.4 million, having increased by 129% in 1989 and another 36.8% in 1990. For 1991, imports are valued at \$131.5 million, reflecting a decreasing growth rate estimated at 12% for that year. Imports are expected to continue growing at a faster pace than local production, estimated at 8% per annum, and amount to \$165.6 million by 1994.

The following table shows total imports by category between 1988 and 1990.

TABLE 3
FURNITURE IMPORTS
(U.S. \$000)

| | 1988 | 1989 | 1990 |
|------------------------------|-----------------|-----------------|-----------------|
| SEATS | | | |
| Swivel seats | 561.1 | 1,682.4 | 3,614.2 |
| Seats convertible into beds | 234.3 | 888.3 | 1,095.1 |
| Seats of cane, bamboo, etc. | 442.1 | 709.5 | 1,172.4 |
| Upholstered seats wooden fr. | 2,428.0 | 8,807.9 | 10,975.9 |
| Other seats wooden frames | 805.8 | 1,764.1 | 1,895.8 |
| Upholstered seats metal fr. | 757.1 | 3,253.2 | 4,585.3 |
| Other seats metal frame | 491.6 | 1,073.3 | 1,422.5 |
| Other seats | 1,215.8 | 3,470.7 | 4,338.3 |
| TOTAL SEATS | 6,935.8 | 21,649.4 | 29,099.5 |
| Parts for seats | 977.2 | 892.8 | 2,321.4 |
| METAL FURNITURE | | | |
| Metal office furniture | 471.8 | 1,899.6 | 3,886.7 |
| Other metal furniture | 2,629.2 | 8,056.0 | 12,304.2 |
| TOTAL METAL FURNITURE | 3,101.0 | 9,955.6 | 16,190.9 |
| WOOD FURNITURE | | | |
| Office furniture wood | 782.4 | 2,615.2 | 5,492.8 |
| Kitchen furniture wood | 1,477.1 | 2,891.9 | 3,949.6 |
| Bedroom furniture wood | 3,980.8 | 8,596.8 | 9,056.9 |
| Other furniture wood | 5,956.0 | 12,733.8 | 16,821.8 |
| TOTAL WOOD FURNITURE | 12,196.3 | 26,837.7 | 35,321.1 |
| OTHER FURNITURE | | | |
| Plastic furniture | 1,900.1 | 3,109.4 | 4,171.9 |
| Furniture other materials | 1,153.4 | 1,731.6 | 2,100.0 |
| TOTAL OTHER FURNITURE | 3,053.5 | 4,841.0 | 6,271.9 |
| Parts for furniture | 926.4 | 1,392.2 | 2,498.2 |

| | 1988 | 1989 | 1990 |
|--------------------------------------|-----------------|-----------------|------------------|
| BEDDING | | | |
| Beds & mattresses | 653.4 | 902.2 | 1,178.8 |
| Sleeping bags | 60.1 | 101.1 | 128.7 |
| Pillows & cushions | 554.4 | 1,480.8 | 2,036.1 |
| Other bedding | 533.9 | 1,581.5 | 1,047.9 |
| TOTAL BEDDING | 1801.8 | 4,065.6 | 4,391.5 |
| LAMPS & LIGHTING FITTINGS | | | |
| For ceiling or wall | | | |
| Lamps batteries/plugs/switches | 228.3 | 328.6 | 374.9 |
| Lampstands & other fittings | 255.9 | 927.0 | 664.9 |
| Chandeliers | 415.2 | 921.5 | 1,159.5 |
| Lamps of iron or steel | 1,854.8 | 2,468.3 | 3,014.7 |
| Other for ceiling & wall | 2,102.0 | 3,522.8 | 5,810.5 |
| For table, desk, floor | | | |
| Bedside/office/inside lamps | 2,536.8 | 4,436.8 | 4,333.5 |
| Other | 177.3 | 744.8 | 869.0 |
| Other electric lighting f. | 678.9 | 2,447.3 | 4,585.2 |
| Non electric lighting | 235.7 | 399.0 | 457.7 |
| TOTAL LAMPS & LIGHTING | 8,484.9 | 16,196.1 | 21,269.9 |
| GRAND TOTAL | 37,476.9 | 85,830.4 | 117,364.4 |

Source: Import data published by Secretaría de Comercio y Fomento Industrial (SECOFI)

As can be seen in Table 3, the largest import category corresponds to wood furniture, which accounts for 30% of total imports. At the same time, wood furniture has the largest import participation in total apparent consumption of 33% (see Table 2). For these two reasons, this segment represents the best opportunities for foreign suppliers wishing to enter the Mexican furniture market. The second most important import category is seats, in particular wooden frame sofas, sofa beds and swivel chairs, which are mostly used in offices. In this area also imports have a high participation, estimated at approximately 15% and it is considered a potentially good and growing market for foreign suppliers. Metal furniture imports, although relatively minor (14% of total apparent consumption) have been growing rapidly and are beginning to represent a significant part of total consumption. Imports of lamps and lighting fixtures also have increased rapidly and represent 20.8% of the market in this segment. Here also, imported "high-tech" designs and technology have good market opportunities. Imports of furniture of plastics and other materials play a small role in this market and imports still are not very significant. In the bedding segment, domestic production practically covers total demand and imports are relatively small and have also not grown as fast as other sectors.

The U.S. has traditionally been the most important supplier of furniture to Mexico, enjoying an 85.5% market share, although several other competitors have been present in the market, namely

Italy, Spain, France, Germany, China, Japan and Canada among the stronger ones. The following table lists the import market share of the principal competitors by category for 1990.

TABLE 4
IMPORT MARKET SHARE
(percentage)

| CATEGORY | U.S.A. | 2nd COMPETITOR | CANADA |
|---------------------|--------------|-------------------|-------------|
| Seats | 83.3% | Italy 7.7% | 0.2% |
| Metal furniture | 89.9% | China 3.7% | 0.3% |
| Wood furniture | 87.6% | Spain 3.9% | 0.1% |
| Furniture other | 75.9% | Italy 6.0% | 0 |
| Parts for furniture | 82.8% | Italy 9.4% | 0.1% |
| Bedding | 97.3% | Italy 0.7% | 0.3% |
| Lamps & lighting | 82.9% | Italy 3.8% | 0 |
| TOTAL | 85.6% | Italy 5.7% | 0.2% |

Source: Based on import data by SECOFI

Canada's participation in this market has been very low, but there are good opportunities in Mexico for Canadian suppliers, in particular of wooden furniture, if they utilize a more aggressive market strategy.

The following table lists Canadian trade with Mexico of furniture between 1988 and 1991.

TABLE 5
CANADIAN TRADE OF FURNITURE WITH MEXICO
(Cdn\$000)

| | 1988 | 1989 | 1990 | 1991 |
|-----------------------------------|------------|------------|------------|--------------|
| CANADIAN EXPORTS TO MEXICO | | | | |
| Upholstered seats | 0 | 15 | 0 | 0 |
| Other seats | 0 | 16 | 0 | 0 |
| Parts of seats | 407 | 57 | 105 | 1,452 |
| Metal furniture | 31 | 18 | 120 | 190 |
| Wood furniture | 29 | 0 | 0 | 54 |
| Plastic furniture | 16 | 0 | 0 | 6 |
| Furniture other mat. | 134 | 110 | 0 | 0 |
| Furniture parts | 4 | 0 | 15 | 0 |
| Bedding articles | 10 | 24 | 327 | 441 |
| Chandeliers | 10 | 0 | 2 | 8 |
| Electric lamps | 25 | 41 | 0 | 3 |
| TOTAL | 666 | 281 | 569 | 2,154 |

1988

1989

1990

1991

CANADIAN IMPORTS FROM MEXICO

| | 1988 | 1989 | 1990 | 1991 |
|----------------------|--------------|--------------|--------------|---------------|
| Upholstered seats | 0 | 0 | 27 | 41 |
| Other seats | 13 | 23 | 43 | 78 |
| Parts of seats | 6,268 | 8,038 | 6,358 | 15,652 |
| Metal furniture | 143 | 169 | 661 | 1,089 |
| Wood furniture | 386 | 779 | 690 | 4,376 |
| Plastic furniture | 8 | 0 | 0 | 0 |
| Furniture other mat. | 24 | 21 | 31 | 46 |
| Furniture parts | 161 | 84 | 82 | 74 |
| Bedding articles | 237 | 88 | 154 | 99 |
| Chandeliers | 55 | 39 | 108 | 84 |
| Electric lamps | 83 | 401 | 92 | 563 |
| Non electric lamps | 0 | 73 | 66 | 92 |
| TOTAL | 7,378 | 9,715 | 8,312 | 22,194 |

Source: Statistics Canada - International Trade Division

Canadian exports, as reported by the Canadian International Trade Division, almost doubled from Cdn\$281,000 in 1989 to Cdn\$569,000 in 1990, although they had fallen from Cdn\$666,000 in 1988. In 1991, they grew again to Cdn\$2.1 million. The largest category of exports reported corresponds to parts for seats, which include seats for cars and other vehicles and probably is the category that grew. Excluding seat parts, Canadian exports to Mexico amounted to Cdn\$702,000 in 1991, up 51% from 1990's Cdn\$464,000, including mostly bedding articles, metal and wood furniture.

Canadian imports from Mexico, on the other hand, are much larger than Canadian exports and amounted to Cdn\$22 million in 1991. Since the same comment regarding automobile seats applies, excluding these, total Canadian imports from Mexico have grown steadily from Cdn\$1.1 million in 1988 to Cdn\$6.5 million in 1991, including mostly wood and metal furniture and lamps.

Canadian manufacturers have not penetrated the Mexican consumer market to any significant degree and have lagged behind the U.S., Europe and Asian countries in supplying the growing demand for imported furniture in Mexico. Several factors have been responsible for this:

- Mexican consumers are very familiar with U.S.-made products;
- Mexican retailers are familiar with doing business in the U.S. and many of them have exclusive representatives or distributors in the U.S. and other countries;
- Geographical proximity with the U.S., which reduces freight and other costs, and allows for faster delivery;
- A longstanding relationship of local distributors with U.S. manufacturers and/or distributors in the U.S.;
- Perceived high quality of European products and in general lower pricing of Asian country exports and better financing terms;

- Little or no knowledge of Canadian products, both by retailers and consumers;
- Very little interest by Canadian manufacturers in marketing their products in Mexico, as perceived by retailers, who reported having received close to no catalogs, calls or visits by Canadian producers or traders.

There is presently a growing market for imported furniture in Mexico and there is a potential for Canadian products in Mexico. Useful strategies for export to Mexico include:

- Participating in existing trade shows or staging an all-Canadian consumer products exhibition in Mexico. Among the most important consumer products show in Mexico is the annual ANTAD (National Association for Supermarkets and Department Stores) convention and trade show, since it attracts over 15,000 retail executives from the over 100 chain stores based in Mexico. The next show will be held in Guadalajara in March 1993, but is staged annually. Other firms also organize periodical trade exhibitions, but these usually have a specific theme (apparel, footwear, textiles, electronics, home, etc.).
- Periodically visiting or corresponding with the top buyers of Mexico's largest chain stores. This is probably the most useful strategy, since much of business in Mexico is made through contacts. It is, nonetheless, more time consuming and expensive.
- Direct mail campaigns presenting catalogs and product lines to the top buyers, although this strategy would be more useful after a first visit and personal contact with these executives.
- Having a good representative or distributor in Mexico, with proven relationships with top retailers and maintaining a close supervision of the operation, at least during the initial period.
- Since competitive pricing, novelty and/or quality are crucial to being able to sell in Mexico and these correlate very similarly to U.S. consumer standards, this should be taken as a useful reference: if the Canadian product is sold/competitive in the United States, the probability is high that it will have a market in Mexico.
- There is no special "need" for any particular consumer product in Mexico. It is more common that the supply creates its own demand. It is therefore important to identify the "right" store(s) for a certain product in terms of consumers' income and taste (which are similar to those found in Canada or the United States) and to market the product aggressively with these stores. Once the product is accepted by a large chain, it will be easier to market elsewhere.

3.1 Domestic Production

The domestic wood furniture manufacturing industry represents 1.6% of total manufacturing GDP and only 0.4% of total GDP, while metal furniture manufacturing accounts for 0.08%. Between 1970 and 1986, the industry grew at an average rate of 3.2%, as compared to a 4.6% overall GDP growth rate. Furniture manufacturing is a very fragmented industry. It is estimated that there are a total of approximately 2,200 furniture manufacturers in Mexico, excluding small shops. They are predominantly (62%) very small establishments with an average of 6 workers and small firms (33%) with 25 workers. Only 1% of all firms are large and employ 226 workers on average. Most of these manufacturers (40%) are located in the Mexico City area and in the Northern (20%) and Western (20%) regions of the country near Mexico's largest consumer centers, Guadalajara and Monterrey. The Mexican furniture industry still has a very low automation level, in particular in the production of wood furniture, where portable equipment is still predominantly used.

In the case of total wood furniture manufacturing, approximately 50% of is of household furniture, 7% of kitchen furniture, in addition to 25% so called loose pieces, such as chairs, bookcases, chests of drawers, etc. used in the house. Office furniture represents another 14%, do-it-yourself furniture 1% and components 3%. Within household furniture, 55% corresponds to living room, 28% to dining room and 17% to bedroom furniture. Most wood furniture is made of pine, mahogany and cedar wood as well as agglomerate, particularly for kitchen furniture. Metal furniture is basically for the office and commercial establishments.

Following are production levels of wood furniture for 1987 in number of items or sets:

| | |
|-----------------|---------|
| Living rooms | 15,641 |
| Bedrooms | 8,564 |
| Dining rooms | 11,892 |
| Kitchens | 2,679 |
| Chairs | 19,609 |
| Bookcases | 9,174 |
| Desks | 7,322 |
| Filing cabinets | 4,409 |
| Components | 31,683 |
| Loose pieces | 414,286 |

Source: INFOTEC - Industria de Muebles de Madera, 1988

Prompted by increased competition from abroad, most Mexican manufacturers have been investing in the past three years and are expected to continue doing so, mostly in machinery and equipment, plant expansion and refurbishing and technology. Imports will, however, continue to play an important role in the future because: fragmentation of the industry does not allow large-scale operations; automation levels in the local industry are still

relatively low, therefore increasing costs; production is usually made on a relatively small scale; there is a lack of qualified labor; quality control is generally only visual and therefore superficial; no set standards are used; innovation is scarce and design is limited to adapting or copying existing designs; and finally, availability and quality of raw materials are usually insufficient and prices high.

Mexico's domestic furniture industry has also been consolidating its exports, which in 1990 reached \$51.6 million, or almost 10% of production, as follows:

TABLE 3
MEXICO'S EXPORTS OF FURNITURE
(U.S. \$000)

| | 1988 | 1989 | 1990 |
|---------------------------|-----------------|-----------------|-----------------|
| Seats | 7,098.4 | 6,061.7 | 6,677.8 |
| Metal furniture | 10,818.8 | 13,502.4 | 11,867.6 |
| Wood furniture | 14,531.8 | 17,099.4 | 14,995.8 |
| Furniture other materials | 1,624.9 | 1,519.8 | 1,300.9 |
| Parts for furniture | 3,847.9 | 4,475.9 | 5,054.3 |
| Bedding | 701.7 | 689.5 | 593.4 |
| Lamps & lighting fittings | 13,709.0 | 11,104.1 | 11,114.8 |
| TOTAL | 52,332.5 | 54,452.8 | 51,604.6 |

Source: Export data published by Secretaría de Comercio y Fomento Industrial (SECOFI)

4. DISTRIBUTION PRACTICES

Distribution channels are similar to those found in other parts of the world: Producers sell to wholesalers and distributors, and directly to the retailers, normally in the case of supermarkets, department stores and chain stores. Wholesalers and distributors then sell to the retailers, including supermarkets. The most common distribution channels for furniture are wholesalers, chain stores specialized in furniture, department stores and very large supermarkets. A small proportion is distributed directly from the manufacturer to retail outlets.

In the case of imported products, the exporter usually ships his products to a distributor or a representative in Mexico. In some cases, the supermarket or department store chain or the specialized chain store directly imports the product, often through a major representative or broker in the United States. Imported products are sold mostly in Mexico City and other large urban areas through supermarkets, department stores and chain stores, which account for some 80% of sales of imported products. Small retail stores in Mexico only carry small inventories, if any, of imported products.

Promotion of furniture is mostly done through use of a direct sales force, followed by participation in national and international exhibitions, and use of newspaper, radio, TV and magazine advertisement.

The commercial margin usually is of approximately 42% on the cost and 30% on the sales price. Distributors purchase household goods with either cash or credit, in similar proportions. Final sales are usually made in cash or with credit cards. Credit is usually granted for periods of 30 days.

The private sector distribution channel, which accounts for 90% of sales (the remainder is through government or union stores), is strong and adequate, but is very centralized in the Mexico City area. To get their products to national markets, many companies maintain regional warehouses and some have plants in different areas of the country. Most national chain stores have their main purchasing offices in Mexico City, where the initial sale and contact is made, but regional purchasing offices are responsible for re-supplying. Others operate their own fleet of trucks to deliver to major market areas where products then move into wholesale/distribution channels. Some companies even ship directly to their clients through the normal transportation network. The cities which show the highest consumer indexes of non-durable goods are Mexico City (39%), Guadalajara (7%), Monterrey (6%), Puebla (4%), León, Tampico and Culiacán (2%).

Commercial establishments are grouped in several chambers and associations, the most important of which are: the National Chambers of Commerce, all associated within the Confederation of National Chambers of Commerce (CONCANACO); the National Chamber of Commerce of Mexico City (CANACO); and the National Association of supermarkets and department stores (ANTAD).

According to a survey made by CONCANACO in the Mexico City area, the majority of furniture stores source themselves directly with the producer, although some 30% purchase from wholesalers. At the same time, most stores that purchase imported furniture, which are estimated at 50%, do it from local distributors rather than import them themselves.

A survey carried out by INEGI in the country's largest cities, identifies the number of stores (S) for furniture distribution, their number of employees (E) and annual sales (\$) in thousands current dollars for 1987 in the wholesale and retail areas:

| | WHOLESALE | | | RETAIL | | |
|-------------|-----------|----|-------|--------|----|-------|
| | S | E | \$ | S | E | \$ |
| Mexico City | 38 | 38 | 2,402 | 170 | 27 | 900 |
| Guadalajara | 6 | 17 | 629 | 24 | 63 | 2,260 |
| Monterrey | 16 | 33 | 1,081 | 33 | 31 | 1,255 |

The ANTAD groups all major private supermarket chains, department stores and chain stores. The following is a list of their larger

members which distribute furniture, with their area of operation (2), the number of stores they have, the total area of sales measured in square meters, and sales of the largest groups that participate in the Mexican Stock Exchange:

| CHAIN | AREA | STORES | SQUARE M | SALES |
|--------------------------|-----------|--------|----------|----------|
| DEPARTMENT STORES | | | | |
| Palacio de Hierro | Mexico | 4 | 63,500 | \$215 MM |
| Puerto de Liverpool | National | 8 | 136,000 | \$421 MM |
| Sears | National | 37 | 134,000 | |
| Almacenes García | National | 18 | 21,320 | |
| Almacenes Zaragoza | Northwest | 7 | 15,700 | |
| Casa Rodoreda | Center | 3 | 10,337 | |
| Central Detallista | Northwest | 12 | 29,000 | |
| José Ramírez | Gulf | 12 | 7,900 | |
| Puerto de Guaymas | Northwest | 10 | 31,150 | |
| Grupo Acevedo | Gulf | 8 | 16,100 | |
| Grupo del Sureste | Southeast | 7 | 12,200 | |
| Importaciones Comer. | Caribbean | 5 | 8,300 | |
| Ciudad de París | North | 4 | 12,000 | |
| Sanborn's | National | 54 | 55,042 | |
| Super del Bajío | Center | 5 | 7,950 | |
| Woolworth | National | 46 | 69,947 | |
| CHAIN | AREA | STORES | SQUARE M | SALES |
| CHAIN STORES | | | | |
| Salinas y Rocha | National | 87 | 108,171 | |
| Singer | National | 117 | 23,424 | |
| Super Hogar | Mexico | 12 | 10,250 | |

4. END USER SECTORS

Mexico's population is approximately 86 million, of which 70% are under 30 years of age. With an estimated annual growth rate of 2% (during the last three decades, population growth averaged 3.2%), total population in Mexico will reach 100 million by the year 2000. 52% of Mexico's total population is an urban population, living in towns with over 15,000 inhabitants. Mexico City alone has 16 million inhabitants, followed by Guadalajara (4 million), Monterrey (3 million) and Puebla (2 million). There were 16 million housing units throughout the country, based on the 1980 census. As of 1989, there are an estimated 17.6 million housing units. Of these, 68% are owned by their inhabitants, while the remainder is rented or belongs to someone else. Only 6% of

2. The areas listed include the following states:

North: Nuevo León, Chihuahua, Durango and Coahuila;

Northwest: Baja California, Baja California Sur, Sonora and Sinaloa;

Northeast: Tamaulipas

Center: Jalisco, Nayarit, Guanajuato, San Luis Potosí and Michoacán;

Gulf: Veracruz and Tabasco

Caribbean: Yucatán, Quintana Roo

housing units has over 5 rooms, 27% has between 3 and 5 rooms while 68% has less rooms.

Future needs of housing, both to cover the needs of an increasing population and for substitution of old housing, are estimated at over eight million units between 1988 and 2000. Of these, 74% correspond to low income housing; 21% corresponds to middle class housing and 5% to high to luxury housing.

According to the Centro Impulsor de la Construcción y la Habitación A.C. (CIHAC), private investment in construction has increased from \$11.9 billion in 1988 to \$15.4 in 1990 and another 8.5% in 1991, to \$16.7 million. Public investment in construction was estimated at \$7 billion in 1990, of which 34% corresponded to the construction of buildings, distributed as follows: office buildings 11.6%, industrial and commercial buildings 8.7%, hospitals 6.9%, schools 5% and housing 2%. Total private investment in construction of offices and housing can further be divided as follows during 1990 and 1991:

TABLE 5
PRIVATE INVESTMENT IN CONSTRUCTION
(volume & US\$ million)

| | 1990 units | 1991 units | 1990 value | 1991 value |
|--|---------------|---------------|---------------|---------------|
| A. RESIDENTIAL BUILDINGS | | | | |
| TOTAL | | | 8,819.6 | 10,740.0 |
| One family housing | 77,100 | 82,500 | 5,355.9 | 6,333.3 |
| luxury | 2,100 | 2,500 | | |
| middle | 27,000 | 29,000 | | |
| social | 48,000 | 82,500 | | |
| Multiple family housing | 67,775 | 75,400 | 2,150.8 | 2,620.0 |
| luxury | 1,575 | 1,600 | | |
| middle | 13,200 | 13,800 | | |
| social | 53,000 | 60,000 | | |
| Selfconstruction | 330,000 | 360,000 | 1,312.9 | 1,786.7 |
| suburban | 180,000 | 200,000 | | |
| rural | 150,000 | 160,000 | | |
| B. REMODELING & MAINTENANCE OF RESIDENTIAL CONSTRUCTION | | | | |
| TOTAL | 585,000 | 601,000 | 812.2 | 985.3 |
| luxury | 15,000 | 16,000 | | |
| middle | 110,000 | 115,000 | | |
| social | 460,000 | 470,000 | | |

| | 1990 units | 1991 units | 1990 value | 1991 value |
|--------------------------------|---------------|---------------|---------------|---------------|
| C. COMMERCIAL BUILDINGS | | | | |
| TOTAL | 550 | 110 | 1,236.8 | 1,122.7 |
| luxury offices | 28 | 30 | | |
| middle offices | 70 | 60 | | |
| malls | 11 | 20 | | |
| supermarkets | 21 | | | |
| stores | 420 | | | |

Source: Catálogo CIHAC de la Construcción 1991

According to a study prepared by CIHAC based on census data, the annual production of housing units increased by 3.8% or 600,000 per year. If, however, one only takes those that are acceptable - that is, housing privately owned, with three or more rooms, proper walls, floors and roofs, electricity, running water, bathroom and kitchen- total annual production is 300,000. Of these, 75% correspond to so-called economic housing or social interest housing, which is built by and/or financed by Infonavit, Fonhapo, Fovissste and other government agencies specifically created to foster and finance economic housing for the working class. These houses usually have an average of 55 square meters, living-dining room, bathroom, kitchen and two bedrooms. Middle class housing, which represents approximately 15% of the total, has between 60 and 120 square meters, and has an additional bedroom and bathroom. Finally, luxury houses amount to approximately 5% and have an average of 250 square meters with five bedrooms and 3-4 bathrooms.

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 furniture has improved significantly as a result of this commercial liberalization. Maximum duty rates have been reduced to 20%. Therefore, imports of furniture 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. Furniture is classified under numbers 9401 to 9405 of the Harmonized System Nomenclature.

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
June 1992

To call all telephone and fax numbers listed below from Canada, unless they are preceded by a different area code, dial 011-525 firts, otherwise dial 011-52-(area) number.

Note: The information on companies not located in Mexico City was nor confirmed.

**APPENDIX I:
CHAMBERS AND ASSOCIATIONS**

**ASOCIACION DE FABRICANTES DE MUEBLES DE JALISCO
JALISCO FURNITURE MANUFACTURERS ASSOCIATION**

Niños Héroes 2663
Col. Jardines del Bosque
44520 Guadalajara, Jal.
Phone: (36) 22-71-78 21-50-35
Fax: (36) 22-71-03
Contact: Lic. Juan Cervantes
Director

**ASOCIACION NACIONAL DE IMPORTADORES Y EXPORTADORES
DE LA REPUBLICA MEXICANA (ANIERM)**

NATIONAL IMPORTES AND EXPORTERS ASSOCIATION

Monterrey 130
Col. Roma
06700 México D.F.
Phone: 584-95-22 564-86-18
Fax: 584-53-17
Contact: Sr. Ernesto Warnholtz
Presidente

**ASOCIACION NACIONAL DE TIENDAS DE AUTOSERVICIOS
Y DEPARTAMENTALES, A.C. (ANTAD)**

NATIONAL SUPERMARKETS AND DEPARTMENT STORES ASSOCIATION

Homero 109 - Piso 11
Col. Polanco
11560 México D.F.
Phone: 545-88-03 254-62-20
Fax: 203-44-95
Contact: Lic. José Antonio Morera

**CAMARA NACIONAL DE COMERCIO, SERVICIOS
Y TURISMO DE LA CIUDAD DE MEXICO (CANACO)**

MEXICO CITY COMMERCE, SERVICES AND TOURISM CHAMBER

Reforma 42
Col. Centro
06048 México D.F.
Phone: 592-26-77 592-26-65
Contact: Lic. Luis Reed Torres
Gerente de Prensa y Difusión

CAMARA NACIONAL DE LA INDUSTRIA DE TRANSFORMACION (CANACINTRA)

NATIONAL MANUFACTURING INDUSTRY CHAMBER

San Antonio 256

Col. Ampliación Nápoles

03849 México D.F.

Phone: 563-34-00 563-05-11

Fax: 598-94-67

Contact: Lic. Roberto Sánchez de la Vara
Presidente

**CONFEDERACION DE CAMARAS NACIONALES DE
COMERCIO, SERVICIOS Y TURISMO (CONCANACO-SERVYTUR)**

NATIONAL CONFEDERATION OF COMMERCIAL, SERVICES

AND TOURISM CHAMBERS

Balderas 144 piso 4

Col. Centro

México D.F. 06079

Phone: 709-15-59 709-11-19

Fax: 709-11-52

Contact: Lic. Carlos Ulises
Lic. Rolando Cordero

**APPENDIX II:
LIST OF MAJOR SUPERMARKETS**

ALMACENES AURRERA S.A. de C.V.
(Aurrerá, Bodegaurrerá, Superama)
Presidente Masaryk 111
Col. Chapultepec Morales
11570 México D.F.
Phone: 203-1311 399-4011 ext. 3620
531-8672 direct
new: 327-9111
Fax: 726-34-50
Contact: Sr. Javier López Mancisidor
Purchase Vicepresident

BLANCO SUCESORES, S.A. de C.V.
Av. Jardín 245
Col. Tlatilco
Estado de México
Phone: 355-7555
Fax: 355-33-55
Contact: Sr. Mateo Codinas A
Commercial Vicepresident

GIGANTE S.A. de C.V.
Av. Ejército Nacional 769-A
Col. Polanco
11520 México D.F.
Phone: 250-3011
Fax: 250-9171
Contact: José Luis Curiel
Purchases Clothing
Jorge Fernández
Purchases General Merchandise

OPERADORA COMERCIAL MEXICANA S.A. de C.V.
Chabacano 43
Col. Asturias
06850 México D.F.
Phone: 740-4955 740-3737 740-4101 740-5612 740-4362
Fax: 740-8307 740-9298
Contact: Ing. Santiago García García
Purchasing Director

TIENDAS CHEDRAUI, S.A. DE C.V.
Av. Javier Rojo Gómez 400
Col. Barrio Sn. Pedro
09000 México D.F.
Phone: 685-53-22 686-90-22
Fax: 685-02-11
Contact: Sr. Benigno Oses
Comprador de Importaciones

TIENDAS DE DESCUENTO SULTANA, S.A. (SORIANA)

Av. de los Angeles 1732 Ote.
64510 Monterrey, N.L.
Phone: (83) 31-00-19 ext. 142
Fax: (83) 31-07-84
Contact: Sr. Carlos Alvarez
Gerente de Compras

TIENDAS DE LA UNAM

Ciudad Universitaria
04510 México D.F.
Phone: 550-50-64 550-50-65
Fax: 550-50-71
Contact: Sr. Gerardo García A.
Subdirector de Adquisiciones

UNIDAD COMERCIAL DE TODO S.A. de C.V.

San Francisco 1621
Col. del Valle
03100 México D.F.
Phone: 534-8100
Fax: 534-3528
Contact: Juan del Cerro Alverde
Supermarket Purchasing Director
Sr. Aarón Jaet
Purchasing Director

**APPENDIX III:
LIST OF MAJOR DEPARTMENT STORES**

ASTOR DE MEXICO Y CIA. S.A. de C.V.

Uruguay 66
Col. Centro
06000 México D.F.
Phone: 521-44-50 and 53
Fax: 521-39-28
Contact: Alan Jaet
Purchasing Director

EL PALACIO DE HIERRO, S.A. DE C.V.

Durango 230
Col. Roma
06700 México D.F.
Phone: 525-90-00 514-02-31
Fax: 207-27-46
Contact: Lic. Martín Urbina Villareal
Purchasing Director

EL PUERTO DE LIVERPOOL, S.A. DE C.V.

Mariano Escobedo 425 - Galería
Col. Chapultepec Morales
11570 México D.F.
Phone: 531-34-40 hasta 50 531-13-88
Fax: 254-56-88
Contact: Sr. Miguel Guichard
Purchasing Director

SEARS ROEBUCK DE MEXICO, S.A. DE C.V.

Poniente 140 No 656
Industrial Vallejo
02300 México D.F.
Phone: 574-18-00 587-84-44
Fax: 368-25-91
Contact: Sr. Jacques Noé
Purchasing Director

WOOLWORTH MEXICANA, S.A. DE C.V.

Sudermann 250 - Piso 2
Col. Polanco
11570 México D.F.
Phone: 250-50-99 254-78-55
Fax: 255-37-98
Contact: Sr. Jaime González
Purchasing Director

EL NUEVO MUNDO MEXICO S.A. de C.V.

Venustiano Carranza 72
Col. Centro
06000 México D.F.
Phone: 521-51-80
Fax: 512-63-00
Contact: Jorge López Vázquez
Purchases

CASA LEY S.A. de C.V.

Carr. Int. al Norte y Calle Deportiva km.1434
80020 Culiacán, Sinaloa
Phone: (67) 15-60-20
Fax: (67) 15-55-91
Contact: Juan Manuel Ley
Director
(there are various purchasing managers by area)

Montes Urales 635-101/102
Col. Lomas de Chapultepec
11000 México D.F.
Phone: 202-0256 202-0447
Fax: 202-0501

ALMACENES 5-10-15 S.A. de C.V.

Prol. Juárez 2
Col. Juárez
73800 teziutlán, Puebla
Phone: (231) 2-07-20 to 22 2-03-11 and 12
Fax: (231) 2-09-86 2-27-91 and 92
Contact: Miguel Halddad Aramburu
Purchasing manager

ALMACENES COPPEL S.A. de C.V.

Av. República 601 Sur
Col. Recursos Hidráulicos
80200 Culiacán, Sinaloa
Phone: (671) 4-34-20 4-86-00
Fax: (671) 4-41-13
Contact: Rubén Coppel
Purchasing Director

ALMACENES ZARAGOZA S.A.

Rafael Buelna 187 Pte.
Col. Centro
80000 Culiacán, Sinaloa
Phone: (67) 13-44-00 13-45-20 13-45-86
Fax: (67) 16-10-41
Contact: Abel Barraza
Impors Coordinator

CENTRO COMERCIAL CALIFORNIANO S.A. de C.V.

Isabel la Católica 1915
Col. Centro
23000 La Paz, B.C.S.
Phone: (682) 2-58-77 2-43-60
Fax: (682) 5-39-70
Contact: Agustín Ruffo Velarde
Imports

TIENDAS DE DESCUENTO SULTANA S.A. de C.V. (Soriana)

Alejandro de Rodas 3102 A
Col. Cumbres
8o sector
64610 Monterrey, Nuevo León
(83) 31-00-19
Fax: (83) 31-07-84
Contact: Francisco Martín Borques
Owner

Av. Los Angeles 1732 Ote.

Col. Juana de Arco
64510 Monterrey, N.L.
Phone: (83) 31-00-19
Fax: (83) 31-07-84

Contact: There are 14 purchasing managers depending on the area.

Av. Industria Eléctrica de México 10

Col. Vista Hermosa
54080 Tlalnepantla, Estado de México
Phone: 572-9000

DISTRIBUIDORA SANSET S.A. de C.V.

Tochtli 352
Col. Industrial San Antonio
02760 México D.F.
Phone: 352-06-35 352-08-63
Fax: 352-08-30
Contact: Sergio Bollazzi
General Manager

(not a department store but imports computers, sporting goods, presents, toys, stationary and kitchen articles)

**APPENDIX IV:
FURNITURE & LIGHTING FIXTURES DISTRIBUTION CHAINS**

CENTROS DE DESCUENTO VIANA S.A. de C.V.

Insurgentes Norte 3
Col. Guerrero
06300 México D.F.
Phone: 566-36-66
Fax: 592-14-53
Contact: Adalberto Rodríguez
Purchases appliances
Juan José Souza
Purchases electronics
Heriberto Huerta
Purchases furniture
Víctor Hugo Gómez
Purchases consumer durables

COMPAÑIA HERMANOS VAZQUEZ S.A. de C.V.

Universidad 2014
Col. Copilco Universidad
04360 México D.F.
Phone: 554-41-44
Fax: 554-91-91 554-55-93
Contact: Pablo Hidalgo
Rogelio García
Alfredo Torres
Purchases

D'EUROPE MUEBLES S.A. de C.V.

Insurgentes Sur 3655
Col. Tlalpan Joya
14090 México D.F.
Phone: 665-70-01 665-78-77
Contact: Joaquín Roldán Retana
Purchases

SALINAS Y ROCHA, S.A. DE C.V.

Presidente Masaryk 169
Col. Chapultepec Morales
11570 México D.F.
Phone: 255-58-00 255-31-60
Fax: 255-58-96
Contact: Sr. Arturo García Cruz
Subdirector de Compras

SANDORNS HERMANOS, S.A.

Calvario 100
Col. Tlalpan
14000 México D.F.
Phone: 655-02-00 ext. 156 655-31-44
Fax: 655-71-17 655-31-55
Contact: Srta. Virginia Ariza G.
Gerente de Importaciones

MADERERA NACIONAL, S.A. DE C.V.

Nogalar Sur 315

Col. Futuro Nogalar

66480 Sn. Nicolás de los Garza, N.L.

Phone: (83) 50-55-55 50-44-44

Fax: (83) 50-55-05

Contact: Sr. Rigoberto Guerrero C.
Gerente de Compras**GRUPO K2, S.A. DE C.V.**

Av. Central 209

Col. Nva. Industrial Vallejo

07700 México D.F.

Phone: 586-50-44 586-66-61

Fax: 586-91-28

Contact: Lic. Georgina Guizar
Jefe de Compras**MUEBLES ALFA, S.A. DE C.V.**

Blvd. Díaz Ordaz Km. 333

Sn. Pedro Garza García

66200 N.L.

Phone: (83) 36-12-02 36-15-55

Fax: (83) 36-13-85

Contact: Sr. Francisco Salinas V.
Gerente de Compras**KRIEL INTERNACIONAL, S.A. DE C.V.**

Oso 69

Col. del Valle

03100 México D.F.

Phone: 534-57-15 524-54-98

Fax: 524-53-58

Contact: Sr. Enrique Leal
Gerente**MUEBLES DICO**

Francisco Madero 120

Col. Iztacalco

08650 México D.F.

Phone: 696-60-22

Fax: 579-52-46

Contact: Lic. Ernesto Gil
Gerente Comercial**MUEBLES FREY, S.A. DE C.V.**

Calle 6 No. 6

Col. Rústica

55340 Xalostoc, Edo. de Mex.

Phone: 755-03-22 755-02-90

Fax: 569-15-46

Contact: Leonides Reyes
Jefe de Compras

MUEBLERIA MOSQUETA, S.A.

Mosqueta 174
Col. Guerrero
06300 México D.F.
Phone: 591-18-66
Fax: 592-35-56
Contact: Isaac Hannon
Jefe de Compras

VADU

Molinos 18 Local B
Col. Mixcoac
03910 México D.F.
Phone: 611-60-33
Fax: 611-69-81
Contact: Lic. Abel del Vázquez
Jefe de Compras

LIGHTING FIXTURES**APREC**

Av. Revolución 1349
Col. Tlacopac - Sn. Angel
Phone: 593-29-51
Fax: 680-46-98
Contact: Gustavo Avilés
Jefe de Compras

ARTESANIAS BAJA, S.A. DE C.V.

Segundo Eje Ote-Pte. No. 25
Cd. Industrial
Mesa de Otay
22500 Tijuana, B.C.N.
Phone: (66) 23-34-00
Fax: (66) 23-30-72
Contact: Robert Blattner
Vicepresidente

FOCOS, S.A.

Churubusco 3900 Nte.
Col. Francisco G. Sada
64510 Monterrey, N.L.
Phone: (83) 34-11-00 34-11-01
Fax: (83) 34-23-24
Contact: Ing. Roberto Zambrano V.
Director General

ILUMINACION LAUREL, S.A. DE C.V.

Prol. Av. Vicente Guerrero 7515
Col. del Valle
32340 Cd. Juárez, Chih.
Phone: (16) 17-33-88 17-32-27
Fax: (16) 549-60-60
Contact: Ing. Noé Rodríguez A.
Gerente General

LA CASA DEL FOCO S.A. DE C.V.

Bolívar 69 - B
Col. Centro
06080 México D.F.
Phone: 709-54-63
Fax: 709-94-62
Contact: Srta. Julieta Cerón
Jefe de Compras

LUCES DE MEXICO, S.A. DE C.V.

Río Grande No. 1 y California
Parque Industrial Río Grande
88170 Nuevo Laredo, Tamps.
Phone: (871) 272-77 277-12
Fax: (871) 273-03
Contact: R.L. Hamilton
Gerente General

OSRAM, S.A. DE C.V.

Alce Blanco 22
Fracc. Industrial Alce Blanco
53370 Naucalpan, Mex.
Phone: 360-03-82 ext. 116
Fax: 360-20-28
Contact: Srta. Gabriela Jurado N.
Encargada de Importaciones

PLUZ, S.A. DE C.V.

Av. Interceptor Poniente 16
Fracc. Industrial
54730 Cuautitlán Izcalli, Edo. de Méx.
Phone: 872-60-66
Fax: 872-17-47
Contact: Ing. Peter Petersen
Gerente General

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