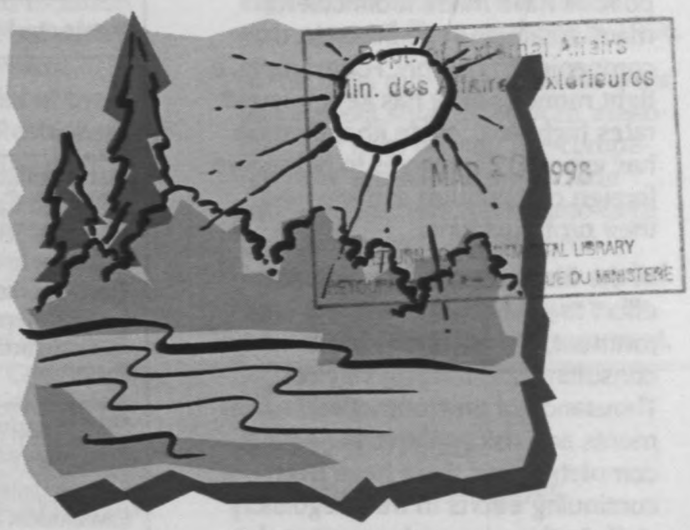
Environmental Equipment and Services



THE OPPORTUNITY

Although the Mexican environmental sector has not traditionally been a major market for Canadian exports, it now offers many opportunities for Canadian suppliers.

- Although the devaluation of the peso has put many projects on hold, Mexico's environmental problems are too severe to ignore, and medium-term prospects are considered good.
- Partly because of the North American Free Trade Agreement (NAFTA), Mexico has dramatically increased its environmental enforcement efforts.
- Mexico lacks the expertise and the infrastructure to solve its own environmental problems. Foreign technical assistance will be essential and many Mexican environmental companies are looking for foreign partners.
- A trend towards the provision of integrated solutions, rather than hardware-based approaches, is increasing the demand for specialized consulting services.

CLEANING UP THE ENVIRONMENT

Although environmental products and services have not traditionally ranked among Canada's major exports to Mexico, new markets are beginning to emerge. These opportunities derive mainly from recent efforts by Mexican authorities to strengthen regulation of the environment and improve public infrastructure. While the devaluation of the peso in late 1994 sharply reduced imports of most products, the nation's environmental problems are simply too severe to ignore. Although some major projects are now on hold, none have been cancelled, and some observers see the return of annual growth in the 15 percent range by the end of 1996.

The contamination of the Mexican environment has reached alarming levels. More than 25 percent of all industry is located in the Valley of Mexico, where excessive emissions, high altitude and temperature inversions combine to make Mexico City the most polluted city in the world.

At the national level, only 20 percent of municipal wastewater and 15 percent of industrial wastewater were treated in 1994. Less than 10 percent of industrial air emissions are controlled. And, only 20 percent of municipal solid waste is disposed of in a landfill.

Public alarm about environmental pollution has provoked government action, most notably the *Ley de Equilibrio Ecológico y Protección al Medio Ambiente*, Law of Ecological Equilibrium and Environmental Protection of 1988. This was followed by new enforcement mechanisms

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: Environmental Equipment and Services***. This market information on the Mexican Environmental Sector 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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in 1992. But other government policies have made it difficult for many small- and medium-sized companies to comply. For example, a tight money policy has kept interest rates high. Also, trade liberalization has exposed companies to aggressive foreign competition and lowered their profit margins.

In the first stages of the national effort to gain control over the environment, the emphasis has been on consulting and training services. Thousands of environmental assessments and risk analyses have been completed, and there have been continuing efforts to train regulatory staff. As the process has matured, a market for measurement and analytical equipment has developed. In the long term, the market for pollution control systems is expected to dominate spending.

Projected Performance of Mexican Environmental Markets, 1994–1996

Market	US $ millions 1994	1995	1996	Average annual percentage growth 1994–1996
Water pollution control*	841	1,085	1,288	24
Solid and hazardous waste**	261	324	402	24
Energy efficiency	270	323	386	20
Renewable energy	149	657	699	174
Fixed-source air pollution control	360	400	456	13
Environmental consulting	18	20	23	13
Remediation	21	24	29	18
Total	**1,920**	**2,833**	**3,283**	**21**

*Figures exclude selected large projects which could mask underlying trends.
**Excludes renewables.

Source: United States Agency for International Development (USAID), Office of Energy, Environment and Technology, 1995.

THE MEXICAN ENVIRONMENTAL SECTOR

The Mexican environmental sector is relatively small, about half the size of Canada's, but it is growing rapidly. Public expenditures on the environment totalled US $2.5 billion in 1993. The market for environmental technologies is of particular interest because a large proportion of it is imported. This market is forecast to grow from about US $1.9 billion in 1994 to an estimated US $3.3 billion in 1996.

The growth of the environmental sector has been encouraged by the North American Free Trade Agreement (NAFTA). The so-called "side agreement", the North American Agreement on Environmental Cooperation, encourages the NAFTA parties to enforce their own environmental regulations.

The sector can be divided into three main sub-groups: air pollution, water supply and sewage treatment, and solid waste disposal (including hazardous waste). Remediation and consulting services often deal with more than one source of environmental damage, and are sometimes regarded as a separate subsector.

Mexico faces problems of crisis proportions in all of these areas. These problems result from inadequate environmental infrastructure and expertise, combined with a rapidly growing population as well as rising urbanization and economic growth. Increased government regulation of the environment is gradually forcing officials of both public agencies and private corporations to take remedial action. These factors combine to create substantial opportunities for Canadian suppliers of environmental technologies.

THE ROLE OF IMPORTS

Imports play a major role in Mexico's efforts to manage its environmental problems. In 1993, imports of environmental control equipment totalled almost US $1.2 billion, about 80 percent of the entire market. Imports also made up a substantial proportion of the market for environmental services, estimated at roughly US $800 million. On the other hand, Mexican companies dominate the market for construction services, which are a major part of most environmental projects.

The United States claims about two-thirds of the Mexican environmental import market. Canada holds a 4 percent import market share in air pollution control equipment, which

Environmental Equipment Market, 1993

	Market	Imports	Share (percent)
Water pollution	174.0	140.0	80.5
Solid waste	723.9	527.3	72.8
Hazardous waste	455.0	424.0	93.2
Air pollution	71.2	64.2	90.2
Energy	71.0	29.6	41.7
Total	**1,495.1**	**1,185.1**	**79.3**

Source: United States Department of Commerce, *Environmental Technologies Marketing Plan*, 1994.

is about double its share of most other environmental products. The trade data do not include services, and it is therefore difficult to estimate Canada's exports accurately. Recently the market has moved towards the provision of integrated solutions rather than specific technologies.

Canadian firms have competitive advantages in certain market segments, but they must compete with established Mexican suppliers, as well as the many international corporations already active in the market. Given this active competition, some of the more successful Canadian companies operating in Mexico have concentrated on market niches where they have a particular advantage.

CUSTOMERS

GOVERNMENT ENVIRONMENTAL AGENCIES

Governments and government agencies have traditionally been the most important buyers of environmental equipment in Mexico. Government expenditures for environmental protection totalled US $2.5 billion in 1993. More than one-third of these expenditures were allocated to mass transit and clean fuel programs. Another third was for conservation and protection of endangered species. The rest was devoted to environmental infrastructure, water facilities and other equipment.

Since 1991 many environmental activities have been decentralized to Mexico's 31 states. Twenty-nine states have their own environmental laws. State and municipal organizations are now the biggest buyers of water supply and wastewater projects as well as solid waste systems.

One of the first priorities of the new government of President Ernesto Zedillo, when it came to power in December 1994, was to establish the *Secretaría del Medio Ambiente, Recursos Naturales y Pesca (SEMARNAP)*, Secretariat of the Environment, Natural Resources and Fisheries. The division of responsibility between federal departments and agencies remains in some doubt as *SEMARNAP* gradually exerts its jurisdiction.

The *Comisión Nacional del Agua (CNA)*, National Water Commission, will retain its responsibility for regulating most of Mexico's water standards, although *SEMARNAP* will also have some jurisdiction in this area.

The *Secretaría de Desarrollo Social (SEDESOL)*, Secretariat of Social Development, continues to have overall authority for urban planning policy. *SEDESOL* is responsible for developing infrastructure, including new municipal and state wastewater treatment plants and solid waste facilities.

STATE-OWNED COMPANIES

Paraestatales, state-owned companies, have traditionally been major users of environmental technologies. Although a large number of them have been sold to private investors over the past few years, energy continues to be reserved for the public sector under the Mexican constitution. There are two major *paraestatales*: *Petróleos Mexicanos (PEMEX)*, the national oil company, and the *Comisión Federal de Electricidad (CFE)*, Federal Electricity Commission.

PRIVATE INDUSTRY

Most industry analysts seem to agree that in the medium term, industrial pollution control will provide the best prospects for foreign suppliers. The needs in this area have only begun to be met, and Mexican buyers have confidence in imported environmental technologies. This implies long-term growth, which is expected to accelerate once the economy stabilizes, perhaps in 1996.

In the short run, the economic crisis will prevent smaller Mexican manufacturers from buying. The companies that are still buying include multinational enterprises and large export-oriented Mexican firms because they have access to capital. However, they also continue to be targets of government enforcement.

COMPETITORS

MEXICAN COMPETITORS

The strength of Mexico's domestic environmental industry lies mainly in construction services. In general, the smaller the role of technology in a project, the more competitive Mexican companies can be. Nonetheless, the trend towards build-operate-transfer (BOT) infrastructure programs is cutting into the domestic market share because foreign competitors often make the key purchasing decisions.

Most Mexican environmental consulting companies are small- to medium-sized. There are only a few Mexican companies that produce technology-based products. Typically, they are either spin-offs of local consulting companies that have developed their own technologies or representatives of foreign manufacturers.

FOREIGN COMPETITORS

The United States enjoys substantial advantages over other foreign competitors in the Mexican environmental sector. The relationship between the two countries regarding border environmental issues is a major factor, especially since many of the border programs are American financed. The American Environmental Protection Agency (EPA) has a high level of technical credibility, and many Mexican standards are patterned after the EPA's. Geographic proximity is also an obvious advantage.

The United States claims about two-thirds of the Mexican market, followed by Germany with an 18 percent share. Other major importers are Japan, France and the United Kingdom. The Canadian share is small, but growing rapidly.

TRENDS AND OPPORTUNITIES

ECONOMIC TRENDS

In late December 1994, the peso was sharply devaluated, leading to a series of reactions, known in Mexico as *la crisis*. As a result, many government-funded environmental programs have been put on hold. No programs have been officially cancelled, but the lack of money has brought government activity almost to a standstill. The devaluation has also led to a relaxation of enforcement of environmental standards, especially as they apply to small companies and municipalities.

On the other hand, the crisis is forcing government agencies, particularly the *Comisión Nacional del Agua (CNA)*, National Water Commission, to consider alternate forms of financing. A variety of privatization schemes, especially build-operate-transfer (BOT) packages, are being considered for new facilities.

MARKET TRENDS

There has been a major trend towards proactive marketing for sales to state and municipal governments, rather than waiting for bid requests. This is especially true for potential build-operate-transfer (BOT) water projects. Foreign and Mexican companies alike are defining potential projects and completing the feasibility studies at their own risk. According to interviews with government officials, Canadian companies have not been active in this type of promotion.

The shortage of funds is driving a trend towards broadly-based regional projects encompassing the needs of more than one municipality. The state governments are also encouraging the integration of water supply and wastewater treatment projects.

SOLUTIONS INTEGRATION

The Mexican environmental market is in the midst of a shift towards the purchase of integrated solutions rather than specific equipment and technologies. Buyers are no longer looking for technologies. They want a complete financial and technological package. This means that the provision of competitive financing has become a key success factor. Build-operate-transfer (BOT) arrangements are particularly popular for wastewater and solid waste facilities, including hazardous waste.

WATER AND SEWAGE TREATMENT

The government is now placing emphasis on privatization schemes including build-operate-transfer (BOT) and operate and maintain (O&M) concessions. It is possible that planned government spending might be cancelled altogether if concession plans are successful. According to officials of the *Comisión Nacional del Agua (CNA)*, National Water Commission, as of July 1994, some 50 existing wastewater plants were considered candidates for upgrading and management by concessionaires.

In the industrial sector, an estimated 100 water treatment facilities, with an average value of US $2 million each, were installed in 1993. When the economic and enforcement environments have stabilized, substantial growth is expected.

AIR POLLUTION CONTROL

Most improvements in air quality will result from government-initiated programs to reduce automobile emissions though the use of unleaded gasoline and catalytic converters. *Paraestatales*, state-owned companies — especially *Petróleos Mexicanos (PEMEX)*, the national oil company, and the *Comisión Federal de Electricidad (CFE)*, Federal Electricity

The Trend Towards Integrated Solutions
US $ millions, 1994

	Traditional	Non-traditional	Total
Market opportunity	**Product and technology oriented**	**BOTs[1], O&M[2], and other investment-oriented packages**	
Wastewater (excluding *Petróleos Mexicanos (PEMEX)*, the national oil company BOTs	311.0	530.0	841.0
Air pollution	30.4	330.0	360.4
Solid and hazardous waste	60.5	250.0	310.5
Total	**401.9**	**1,110.0**	**1,511.9**

[1]BOT: build-operate-transfer
[2]O&M: operate and maintain

Source: United States Agency for International Development (USAID), 1995.

Commission — are also under pressure to reduce their emissions, but much of this will be accomplished through fuel substitution. For this reason, private sector customers make up most of the market for air pollution control equipment and services.

Direct sales of air pollution control equipment to end users, especially small factories, are not expected to increase substantially in the short term. In the medium term, sales of equipment and services for measuring and analyzing pollution problems will dominate the market. In the longer term, increased enforcement of air contamination regulations will lead to a growing market for control equipment, especially in those sectors and geographical areas targetted as enforcement priorities.

SOLID WASTE DISPOSAL

The demand for solid waste handling systems comes mainly from municipal and state governments. The single most important market is for collection concessions, but combined concessions for collection and landfill operation are an emerging trend. Municipal garbage collection tends to be strongly influenced by union interests which do not necessarily favour privatization.

Industrial users also demand integrated disposal services. As new regulations become effective, they will increasingly require services such as soil testing and remediation, environmental audits and waste identification.

HAZARDOUS WASTE

The current market for hazardous waste disposal is relatively small. By one estimate, the 1995 market was US $8.5 million for hospital incineration, US $20 million for industrial recycling and US $23 million for industrial incineration. This market is expected to grow rapidly over the medium term as new regulations are enacted. In particular, Mexico's first polychlorinated biphenyl (PCB) regulations are expected in 1996.

There is a need for large-scale disposal and/or containment facilities, as well as company-specific solutions, equipment and consulting services. In the short term, the market is mainly for consulting and storage services.

CONSULTING OPPORTUNITIES

With the exception of the large multinational corporations, Mexican industrial organizations tend to be much less sophisticated than their Canadian counterparts. Unfortunately, many of them believe that simple solutions are available and they easily fall prey to companies selling specific equipment rather than solutions.

There are opportunities for Canadian consulting companies, especially those with experience in the equivalent industries in Canada. But as one expert put it, they are faced with a "double sell": they must convince customers that they need a consultant in the first place, before they can sell their particular qualifications.

MARKET ENTRY STRATEGIES

The environmental sector is new in Mexico, and local companies tend to suffer "sticker shock" when they see foreign prices for environmental services. Decision makers do not generally understand all of the concepts necessary to distinguish good service from bad. A related problem is that Mexicans are not accustomed to paying for waste disposal services. Persistent marketing, including providing customers with technical education, is needed to overcome this fundamental barrier.

Perhaps the biggest obstacle to greater participation of Canadian firms in the Mexican environmental market is the lack of local presence. Mexicans prefer to purchase imported services and equipment from companies with a demonstrated commitment to the local market. A local partner will probably need to provide day-to-day service and coordination, but the foreign supplier must be seen to be in control, because foreign technology is regarded as superior.

The federal government is encouraging municipalities to "concession" municipal services such as wastewater treatment and solid waste collection and disposal to the private sector as a means of financing rapid improvements.

Build-operate-transfer (BOT) arrangements have been particularly popular in the water supply and wastewater treatment area. One reason is that municipalities now have full jurisdiction over tariff collection and payments to the plant operators.

Obtaining funding for BOT projects in Mexico is extremely difficult, however. As one Mexican business leader recently put it, foreign suppliers should "bring their own money" when contemplating BOT packaging.

THE REGULATORY ENVIRONMENT

The *Ley de Equilibrio Ecológico y Protección al Medio Ambiente*, Law of Ecological Equilibrium and Environmental Protection of 1988, is the cornerstone of Mexico's environmental policy. All states are required to publish their own environmental law and so far 29 states have done so. They are mainly adaptations of the federal law. The states of

Tlaxcala and Campeche have not yet enacted their own environmental legislation.

A new federal environmental secretariat, *Secretaría del Medio Ambiente, Recursos Naturales y Pesca (SEMARNAP)*, Secretariat of the Environment, Natural Resources and Fisheries, was created by the Zedillo administration in late December 1994. It took over a number of key environmental agencies which were formerly part of other secretariats.

The *Procuraduría Federal para la Protección del Ambiente (PROFEPA)*, Office of the Federal Attorney for Environmental Protection, is responsible for the enforcement of most environmental standards. Most wastewater standards are in the

Key Mexican Environmental Regulatory Agencies

AGENCY	ENVIRONMENTAL RESPONSIBILITIES	COMMENTS
SEDESOL *Secretaría de Desarrolla Sacial*, Secretariat of Social Development	Overall urban planning issues as they impact upon the environment, including wastewater and solid waste management.	Lost *Instituto Nacional de Ecología (INE)*, the National Institute for Ecology, and *Procuraduría Federal para la Protección del Ambiente (PROFEPA)*, the Office of the Federal Attorney for Environmental Protection, to *Secretaría del Medio Ambiente, Recursos Naturales y Pesca (SEMARNAP)*, Secretariat of the Environment, Natural Resources and Fisheries in recent restructuring.
SEMARNAP *Secretaría del Media Ambiente, Recursas Naturales y Pesca*, Secretariat of the Environment, Natural Resources and Fisheries	Overall environmental policy for Mexico.	Increasing focus on privatization and concessions, and use of economic instruments in environmental policy.
INE *Instituto Nacianal de Ecalagía*, National Institute of Ecology	Development of environmental regulations *(NOMs)* for all environmental fields and analysis of EIAs* submitted for approval.	Reports to *SEMARNAP*.
PROFEPA *Procuraduría Federal de Protección Ambiental*, Office of the Federal Attomey for Environmental Protection	Enforcement of regulations developed by *INE*, except for wastewater issues (unless classified as toxic).	Increasing private sector involvement in enforcement process; reports to *SEMARNAP*.
CNA *Comisión Nacional del Agua*, National Water Commission	Enforcement of wastewater regulations developed by *INE* if effluent is discharged to a national water body such as a river, lake, bay or stream.	Possibility of moving *CNA's* enforcement responsibilities to *PROFEPA*; reports to *SEMARNAP*.
IMTA *Instituto Mexicano de Tecnología del Agua*, Mexican Institute for Water Technology	Responsible for research in water and wastewater field; focus on technology development and application.	Reports to *SEMARNAP*.
State governments	All but two states have environmental laws, and may have environmental standards stricter than federal equivalent; source of funding for municipal wastewater plants.	States will play a larger role in environmental management practices; states must approve all municipal build-operate-transfer (BOTs) and concessions that last longer than three years.
Municipal governments	Responsible for solid waste collection and disposal services and enforcement of regulations goveming effluent from industrial plants into the municipal drainage system.	Term of office is three years.

*Environmental Impact Assessments

jurisdiction of the *Comisión Nacional del Agua (CNA)*, National Water Commission, although *PROFEPA* has some jurisdiction in that area as well.

PROFEPA claims that almost two-thirds of Mexican companies were visited between July 1992 and July 1994. Most observers doubt that the agency had the resources to do serious inspections of so many sites. Nonetheless, there has been a dramatic increase in inspection efforts over the past few years.

KEY CONTACTS

CANADA

Canadian Government

Department of Foreign Affairs and International Trade (DFAIT)

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

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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.*

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

World Information Network for Exports (WIN Exports) is a computer-based information system designed by DFAIT to help Canada's trade development officers abroad match foreign needs to Canadian capabilities. It provides users with information on the capabilities, experience and interests of more than 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.

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Canadian International Development Agency (CIDA)

CIDA is an important possible source of financing for Canadian ventures in Mexico. A special fund is available through 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.

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Revenue Canada

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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Mexican Government Offices in Canada

Mexican trade commissioners in Canada and Mexican consulates can provide assistance and guidance to Canadian companies in need of information about doing business in Mexico.

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Mexican Research Institutes

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National Bank of Construction and Public Works
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Mexican Institute for Water Technology
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Business and Professional Associations

Mexican Association for the Control of Solid and Hazardous Waste
Asociación Mexicana de Control de los Residuos Sólidos y Peligrosos
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Association of Water and Waste Water Companies
Empresas de Agua y Saneamiento de México, A.C.
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Cámara de Comercio de Canadá en México
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National Chamber of Commerce of Mexico City
Cámara Nacional de Comercio de la Ciudad de México (CANACO)
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American Chamber of Commerce in Mexico, A.C.
Cámara Americana de Comercio en México A.C. (AMCHAM)
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National Chamber of Manufacturing Industry
Cámara Nacional de la Industria de Transformación (CANACINTRA)
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Confederation of Industrial Chambers
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National Association of Importers and Exporters of the Mexican Republic
Asociación Nacional de Importadores y Exportadores de la República Mexicana (ANIERM)
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Mexican Confederation of National Chambers of Commerce
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