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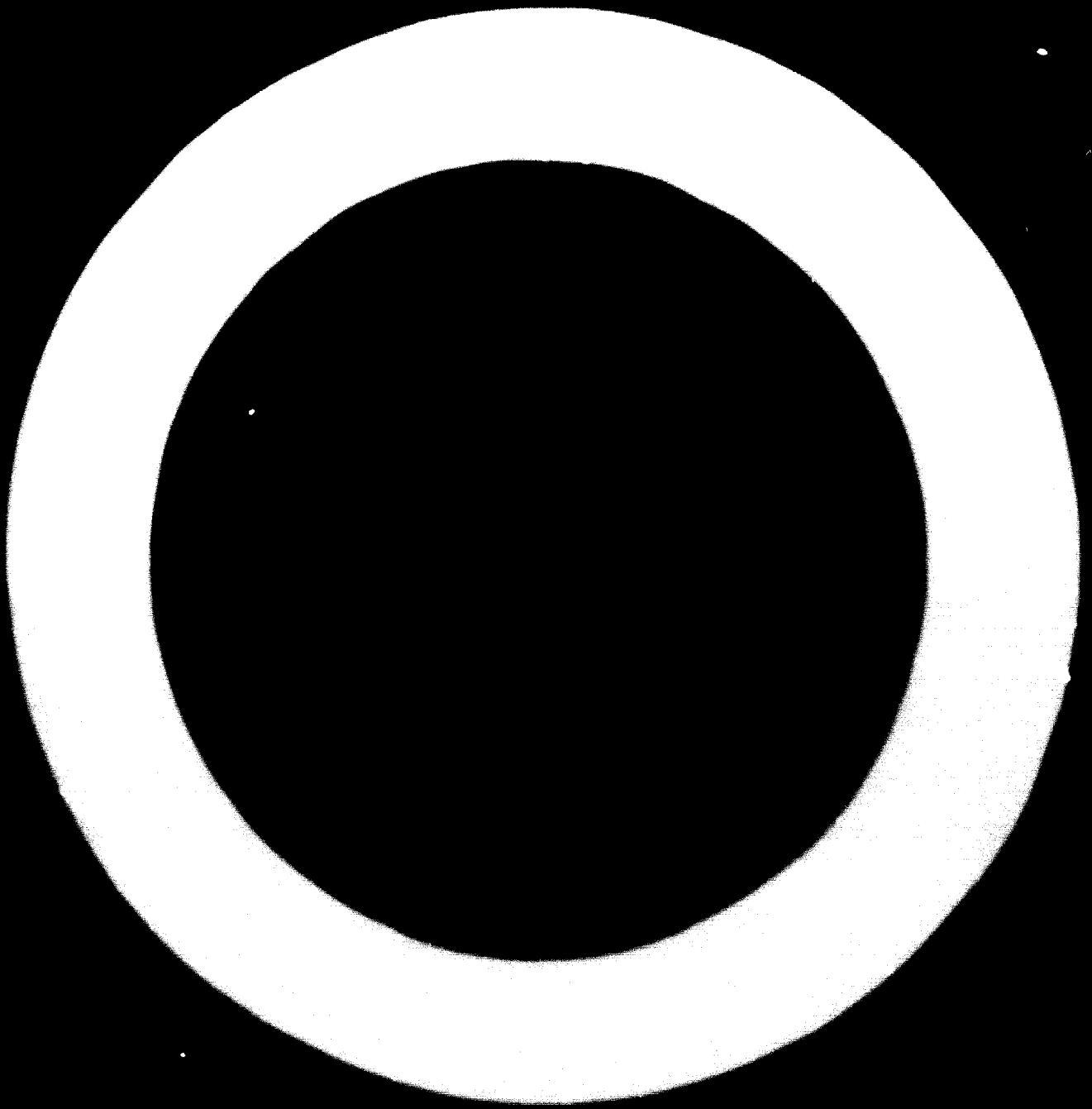
THE FURNITURE AND CABINETMAKING INDUSTRY OF MEXICO 1/

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FORESTS

As a result of the natural beauty of the Mexican landscape, consisting of 1,972,545 hectares, 23% of which, i.e. 453,000 hectares, are under thirty years of age, but so fertile that Mexico is a country of young forests. Mexico's population is predominantly rural, 80% being employed in agriculture.

In this context the forests of Mexico undoubtedly represent one of the country's natural resources most suitable for diminishing unemployment and accelerating regional development.

Mexico is located geographically in one of the principal arid zones of the world, between 15° and 33° north latitude, with two almost parallel mountain ranges, the eastern chain following the Gulf coast and the western chain the Pacific coast. Two-thirds of Mexican territory is covered by these ranges. The total area of Mexican territory is 1,972,545 square kilometers.

MEXICO'S RESOURCES

Some geologists, botanists, and silviculturists reached the conclusion that originally the Mexican Republic had 6 million hectares of arid land devoid of arboreal vegetation. This territory represented 30% of its territory; consequently the other 70% was covered with forests. According to its best present estimates, the country now has 40 million hectares of temperate, cold and hot forests, and 20% of this area, i.e. 8 million hectares, can be exploited with a gross production of industrial products of the order of two billion pesos and the employment of approximately 20,000 persons.

The tropical forest area covers a surface of twelve million hectares with a 300 million peso production, the industry having established six plywood plants and three particle-board plants.

Lumber exploitation includes, basically, sawn woods, plywood, veneers, particle-boards, ties, and chips.

the zone's production capacity, especially pine, is 1 million cubic meters of trunks. The production capacity, in general, is three million cubic meters.

In 1970 the distribution of lumber production was: saws 24.2%, plywood 3.1%, cellulose 13.8%, residue (chips, bark, etc.) 59.8%.

LUMBER INDUSTRY

In 1970 the Mexican lumber industry comprised 120 sawing plants producing 1.7 million cubic meters. The demand in 1976 is calculated to be 3.3 million cubic meters.

In 1970, 140 million pesos of sawn products were imported and 76 million exported.

There are 72 panel plants (plywood and particle board) which produce 120,000 cubic meters; it is estimated that the 1976 demand will be 600,000 cubic meters.

NATIONAL FORESTRY DEVELOPMENT PLAN

During 1971 steps were taken to promote a forestry development plan and an industrialization programme. In January 1972 the Sub-Secretariat of Forestry formally initiated the studies for the elaboration of the National Forestry Development Plan to determine the best manner of satisfying needs, including the apportionment of present exploitation in more readily leaseable units and preinvestment studies in specific items.

This plan is to be concluded this year; wood-product requirements for 1976 have been calculated to be twice as large as present needs, while those of 1990 will be three times as great.

One of the plan's fundamental activities is the elaboration of regional projects with a view to defining the expansion and integration necessary for the reduction of prime material costs and the establishment of integrated industries, which will permit the best utilization of the available forest, infrastructural, energy and water resources of the zones.

The project is located in the north of the State of Durango. The potential resources available are 1.5 million cubic meters of conifer and an unrestricted amount of oak. Products to be manufactured are cellulose for the production of paper and corrugate, plywood, and sawn lumber.

DURANGO

This project is located in the north of the State of Durango. The raw material available consists of 1.5 million cubic meters of conifer and an unrestricted amount of oak. Products to be manufactured are cellulose for the production of paper and corrugate, plywood, and sawn lumber.

SIERRA MADRE DEL SUR

This project is located in the Sierra Madre del Sur of the State of Guerrero. Forest resources available are 1.5 million cubic meters of conifer and an unrestricted volume of oak.

Manufacture of cellulose, newsprint, plywood, particle-board, and sawn lumber.

PANAMA

This project is located in the south of the State of Chiapas. There are potential resources to the order of 1.5 million cubic meters of conifer.

Manufacture of cellulose as a complement to existing plywood, particle board and sawn lumber plants.

MICHOACÁN

This project is located between the north of the State of Aguascalientes and the south of the State of Durango. There are potential resources of the order of 0.5 million cubic meters of conifer and an unrestricted volume of oak.

Manufacture of plywood boards and sawn lumber.

MICHUACAN

This project is located in the Balsas zone. Some 1.0 million cubic meters of wood are available.

Manufacture of cellulose, plywood boards and sawn lumber.

ISTHMI

This project is located on the Isthmus of Tehuantepec. There are some 0.4 million cubic meters of conifer and 1.0 million cubic meters of common tropical wood available.

Manufacture of fibre boards for export, veneer, and sawn lumber.

STATE OF CHIAPAS

This project is located in the highlands of the State of Chiapas. Some 1.0 million cubic meters of conifer and an unrestricted volume of oak and common tropical woods are available.

Manufacture of cellulose, plywood boards, veneer, and sawn lumber.

ATEMOLTEPEC

This project is located in the south of the State of Jalisco. It will complement the already established industry for the manufacture of cellulose and kraft paper as well as the extraction of resins, with the manufacture of plywood board and sawn lumber, in order to achieve total utilization of forest resources and lower the costs of cellulose material.

ENSENADA

This project is located in the north of the State of Baja California. Some 100,000 cubic meters of pine are available. Manufacture of boards and sawn lumber.

FRATINALE

This project comprises the whole of the State of Mexico, with some 0.5 million cubic meters of conifer and an unrestricted volume of oak, there being openings for the manufacture of boards, sawn lumber,

resin extraction, and the industrial development of handicrafts and allied industries.

SOUTHWEST

This project is located in the States of Yucatan and Campeche and in the Territory of Quintana Roo. Its lumber will come from allied developments, from the clearing of agricultural land in the region, and from the import of logs.

Manufacture of plywood and particle-board, veneer, sawn lumber and associated industries.

The industry is already established and co-ordination and organization of its supply are all that is needed for the realization of this project.

DURANGO

This is located in the centre of the State of Durango. Some 0.7 million cubic meters of conifers are available, which will come from the ejidal, forestry enterprises and from other forests.

The industry is already established in this region, and to realize this project all that is needed is the co-ordination and organization of its supply.

These projects can be considered to constitute the forestry development plan for the next five years, the aim being to double present production.

THE FURNITURE AND CABINETMAKING INDUSTRY

Traditionally Mexico has artisans of inestimable value. There are regions in the country, such as the States of Michoacan, Jalisco, Guerrero, Guanajuato, and Colima which are outstanding for the value of their handicrafts.

Owing to the adequate labour resources described above, a handicraft industry in Mexico has developed. The production units range from the family workshop producing scarcely enough to cover necessities,

other small workshops with five to ten carpenters working on subcontracts to distributors of rustic or colonial furniture, to large thriving businesses in rustic and colonial furniture which have sprung up in the last few years in Mexico. This industry produces inexpensive furniture, which is very popular in our country because of its price and functional design. This type of furniture has met with acceptance outside Mexico, and considerable exports have resulted. The largest furniture production plants have been set up in the cities of Monterrey, Mexico, and Guadalajara. The furniture produced by these factories is styled for offices, residences, and for special designs.

In Mexico City there are approximately twelve to fifteen important furniture establishments, with an average labour force of eighty to one hundred persons. The machinery installed in these factories is most advanced and adequate, even though the furniture industry, from the standpoint of planning and organization, only began to function some twenty years ago.

The materials most commonly used in the manufacture of fine furniture are the following: mahogany, cedar, walnut, and pine, in boards, as well as veneers of precious woods, particle-board, and plywood. Together with these materials frequent use is made of: laminated plastics, chromium-plated, steel parts, glass, and acrylics. For upholstery purposes use is made of very good quality cloth, leather, and plastic imitation leather. In cushioning materials, latex rubber and artificial rubber (soft polyurethane) are used on a large scale. Dacron is used for stuffing while in lower quality furniture cotton and other stuffings are used.

Very few factories are working with oven-dried and kiln-dried lumber, and only three or four establishments know the process for laminated-wood furniture.

PROSPEROUS FOR ENTIRE DEVELOPMENT

Mexico is a developing country. A housing programme has become established to supply the workers and farmers with houses, there being

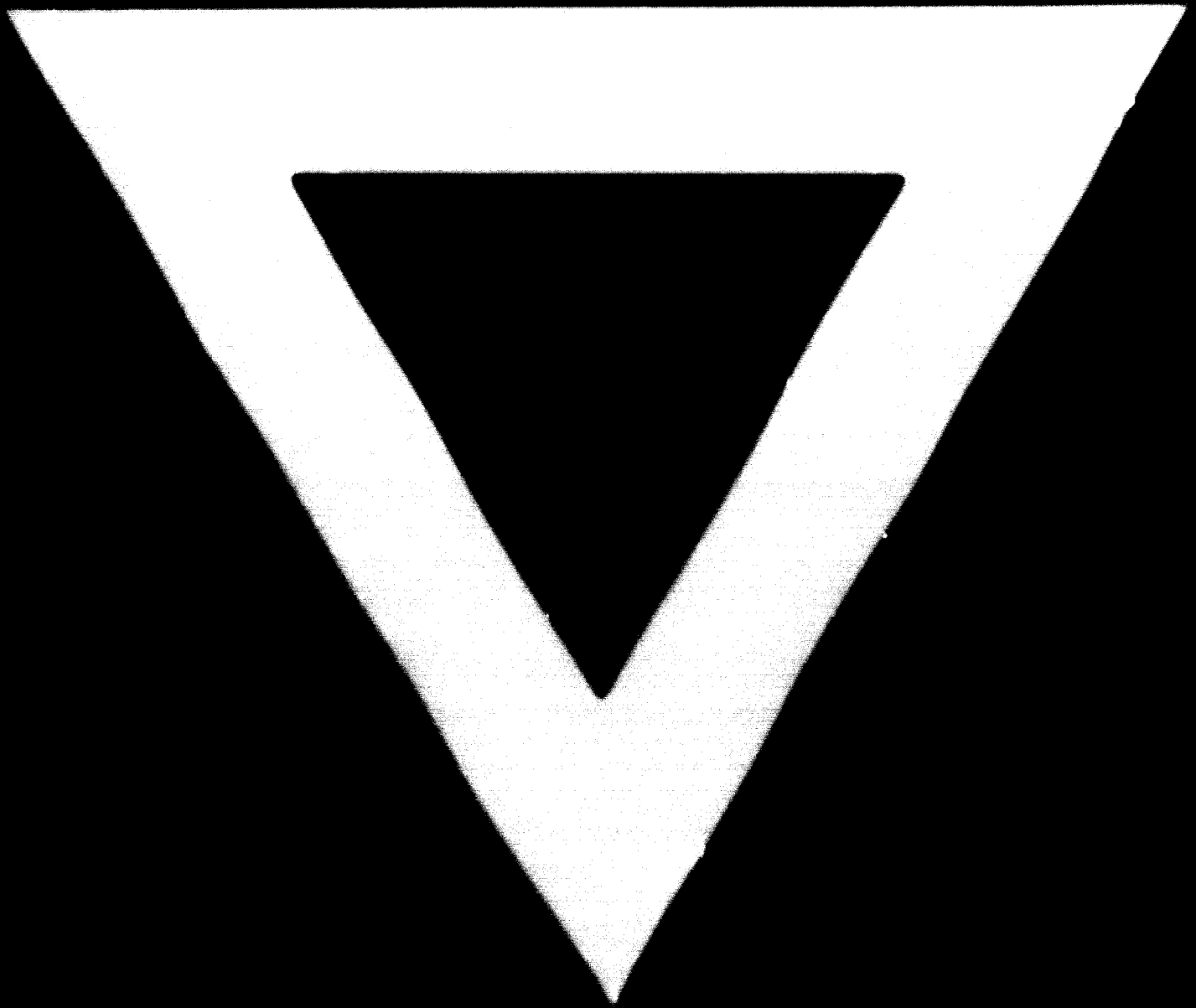
a need for 400,000 houses per year. This need of Government has become the first aim of this new scheme. In 1950, 200,000 dwellings will have been constructed in this first stage.

Naturally, this will drive industrial development ahead, including the furniture industry, and a better standard of living will be created for our people and the demand for furniture will be greater. Likewise, the quality and design of furniture will be improved in order to meet the greater demand to be expected.

We must establish an industry capable of producing at lower cost, but with no sacrifice of quality and design in order to be able to compete with foreign commerce, which is another of the Government's goals.

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