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ASSISTANCE TO THE WOODEN FURNITURE INDUSTRY
OF THE STATE OF CAMPECHE

SI/MEX/93/802

MEXICO

Terminal report*

Prepared for the Secretariat of Economic Development,
Government of the State of Campeche
by the United Nations Industrial Development Organization,
acting as executing agency for the United Nations Development Programme

Based on the work of R. A. Manoff, marketing adviser

Backstopping Officer: R. M. Hallett
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United Nations Industrial Development Organization
Vienna

* This document has not been edited.

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I - Introduction

This wood product marketing activity report deals with the final phase of a comprehensive UNIDO support to the development of Campeche wood-resource related industries begun in 1993. This current effort has been undertaken on behalf of and in cooperation with the Secretariat for Economic Development, Campeche, Mexico (Secretaria de Desarrollo Economico - SDE-)

This report should be read as a follow-on to the report of the earlier (12-1-93) based on the work of Mr. Juan G. Arteaga, Wood Products Engineer. The conclusions reached in the 1993 phase of this activity were generally directed to the need for developing a clear technical support strategy that would result in an improved skills and production performance for area wood product producers. The first mission activity recognized the varied range of producer skills and plant capacities found in Campeche. These skills and capacities were seen to vary from simple carpentry to several advanced-technology wood veneer and parquet floor operations. The 1993 effort also recognized the essential artisanal or non-serial production characteristics of the Campeche furniture industry. The conclusions offered in the first phase report dealt with a general area need for technical training and production process development as well as marketing and credit access assistance.

The present effort has been focused on the discovery of both national and offshore market opportunity for Campeche wood product producers. This work has also been directed to the formulation of a cost-effective strategy that SDE might now pursue to reach more significant Campeche exports of wood based products.

This activity has been focused on market-demand training. A series of seminars was directed to area producers in Campeche City and within the smaller community of Escarcega. This training work has also permitted the examination of a

range of producer work skills and producer plant facilities. This review has identified current constraints to the production of wood products that are in current demand in world markets. This same review has also identified several Campeche wood industry production assets that may support a development of a useful artisanal wood product export industry.

II - Activities

This 26 day activity extended from 17 January to 13 February 1995. This programmed work time permitted a useful examination of area work skills through repeated work shop visits. These visits also allowed an examination of the general quality of producer facilities and production processes. These visits were made with effective support from SDE staff. Work shops and factories visited and persons interviewed are noted in Annex 1.

Prior to actual travel to Campeche, some 16 hours of training activity were programmed for delivery to program participants in both Campeche (12 hours) and in Escarcega (8 hours). The content of the seminars are provided in Annex 2. The participants in the training seminars are indicated in Annex 3.

Within plant visits and training activity there was useful opportunity to provide new product designs and specifications to interested participants. These training beneficiaries agreed to immediately make several new products using tropical wood "despardicios" or "scrap lumber". These non-traditional and somewhat more sophisticated products related to current export market interests and included wooden "eggs" as well as laminate carving boards and bread boards. These test items were fashioned from exotic hardwoods (using scrap lumber only) and were produced in both Campeche and Escarcega.

During this activity , continuing discussion with the SDE leadership and area business leaders provided useful insights dealing with the issues of declining local timber availability, trained labor scarcity , local business access to management skills, cost and quality of commercial transport to and from Campeche, cost and access to both short and long term credit and , repeatedly, the lack of offshore market information .

Finally , this activity permitted the development of a specific strategy designed to enhance the quality, volume and variety of Campeche wood products . This strategy is targeted to the penetration of export markets . This same strategy , however, serves equally well for an increase in sales to national and regional markets. The strategy is discussed under Recommendations as Market Demand Production - Campeche -Mexico

III - Findings and Conclusions

A- Findings

There are no serial-production wood furniture factories in Campeche. There are two advanced technology serial wood product plants in Campeche. These plants are designed to produce parquet floor products (Parquet Laminado Co.) and solid wood (panel) flooring (Parquet Corcab. Co.) Campeche also produces veneer by peeling softwood logs. This veneer is largely used for the production of doors. There are also a number of artisanal wood furniture producers throughout the State of Campeche.

Campeche , once a serious exporter of mahogany and cedar, among other precious tropical forest species, reports a constant annual decrease in production of timber from 200 thousand cubic roll meters in 1986 to an estimated 25 thousand CR meters in 1994. (Ministry of Agriculture and Water Resources - SARH)

The installation of the hardwood parquet and flooring plants in the late 1980s was then predicated on an ample continuing supply of hardwood and particularly mahogany. Area tropical wood resources, however, have now declined to the point where high production unit-costs and available delivery volumes are no longer suitable for the profitable production and export of wood flooring. The rationale for these factories has been based on heavy demand access to local resources and on high volume and relatively sophisticated factory production. The owners of the wood flooring operations have recently begun to import wood from the United States and Canada, principally southern-yellow pine and oak. They are currently producing a limited production for the export market. Production costs, however, remain high and these operations are reportedly under some financial stress

o - Artisanal Wood Product Capacities and Capabilities

The skills and plant capacities of these producers range from simple hand-tool carpentry shops to shops having band and table saws, planers and lathes. Belt and disc sanders are generally rare throughout Campeche as are jigs, routers, sharpeners, and separate paint and spray areas. Access to kiln dried lumber is rare. The wood shops of Campeche generally serve a local market with special order production for traditional furniture as well as for products copied from client supplied photographs. Well designed and well equipped artisan wood shops were not seen in Campeche. Well developed artisanal work skills, however, were seen to be clearly available. This labor skill pool is seen as potentially able to produce high-quality export demand products given market orders and given specific technical training as well as general production support based on funding provided by commercial orders.

This activity has been conducted in an appropriate climate of concern for the use of possibly at-risk Mexican forest resources. Campeche and other Mexican States such as Chiapas and Quintana Roo reportedly still have timber resources that are now

managed within environmentally sensitive Mexican forest management programs. In this circumstance, this present effort has focused on an artisanal use of Mexican tropical wood. The limited wood volume required for secondary product manufacture by Campeche small scale producers is likely to have only a benign environmental impact.

Given the interest in the conservation of Mexican forest resources, the production use of principally saw-mill tropical wood cut-off (despardicios) becomes significant. Mexican sawmills and cutting practices result in large tonnages of tropical wood generally unmarketable as commercial lumber. (Lumber is also cut by the use of both band and rotary saws producing very wide kerfs and thereby very high loss of usable lumber to sawdust and cut-off production). The presence of the large quantities of "waste-wood" throughout Campeche offers, however an immediate opportunity to use this material for the production of products which already have an established market niche in offshore markets.

This UNIDO activity provided product designs and production specifications to several Campachano artisan producers. These designs were selected to reflect current North American (Canada/U.S.) and European table-top and other household product interests. Products were selected for high quality preparation and for excellence in natural surface (oil) finishing. In all cases the products were specified for preparation using only wood cut-off.

Some six Campeche wood craftsmen volunteered to accept and produce the sample products. Notwithstanding their not having disc or belt sanders or effective lamination equipment, all six managed to deliver well crafted samples in one or two days. These samples are evaluated from very satisfactory to excellent (see photographs Annex 4). The relatively simple designs were produced as training evaluation samples but they do reflect current offshore market interests. The surprisingly good results produced by the Campeche craftsmen indicates that with the supply of

more detailed wood product designs and specifications they could, in fact, supply an export market with well crafted high end products. They are seen to be able to accomplish this production if given wood craft shop (not furniture shop) technical assistance support. These potential producers for export will also need access to production related credits and to effective export business services.

B- Conclusions

o Serial Production of Furniture

There are several current constraints to the development of Campeche as an effective center for technically advanced furniture production. Among these constraints are, and most importantly, the decreasing availability of local timber and particularly tropical hard woods. Serial furniture production for export demands a carefully established projection of a continuing timber supply as well as reasonable market commitment. Local business leaders report that the supply of local timber is already inadequate for local product production needs and this now results in the import of timber and generally from the U.S. Ample kiln drying facilities are not now in place and would need to be established to supply a furniture export industry. Further, Campeche overland and sea freight costs are also reportedly high and limited in scope and quality of service. Campeche does not have cargo vessel docking facilities. The prospects for a serial production furniture industry in Campeche is not positive.

o Artisanal Production -of Household and Gift Items

Campeche, however, does have two significant wood product manufacturing assets that can now support an effective export product industry. Campeche has access to large volumes of tropical wood cut-off (despardiicos). Local artisans already use this material but only in limited amounts for local product needs. In

addition to hardwood cut-off, there are tonnage volumes of veneer scrap. This material is likely useful for the home-shop production of Xmas decorations and would tend to benefit women as producers.

Campeche also has a pool of wood product artisans who have clearly demonstrated basic and effective woodworking skills during the delivery of this exercise. They have also indicated a willingness to better the quality and volume of their current production. The presence of these important human and material resource assets suggests a cost-effective strategy to implement a useful export industry for the Campeche community.

A sample of the market windows seen now available for Campeche wood products are tabletop items (carving and serving boards), disassembled garden furniture, bird houses and feeders, educational toys, clock housings, and kitchen tools.

IV - Recommendations

o Development of Artisanal Production for the Export-Market

This report proposes as given that the multi-billion dollar North American and European demand market for wood based household accessory and gift industry wood products has ample entry possibility for well crafted Campeche products that can precisely meet offshore market demand and price point requirements. A conclusion of this activity is that the use of tropical wood cut-off as well as a limited use of locally sawn tropical timber could now effectively supply an artisan export industry. The basic labor supply for this industry is already in place and is receptive to the further training needed to deliver a wide range of new export products.

There are several issues to be resolved .

1- How are offshore market-window opportunities to be continually identified for Campeche production needs? What marketing actions are needed to serve this export activity.

2- How are new product samples to be produced in Campeche ? How will production designs and specifications be developed and delivered to local producers (sub-contractors) ?

3- How will quality control systems installation and production oversight be managed.?

4- How are production credits to be managed for producers having orders for export production ?

5- How is a supply of (6 to 9 %) kiln dried wood to be generated for export production use?

6- How are business trading services such as commercial order management, producer order delivery and producer payments to be managed ?

o Campeche Artisan- Industry Trading Company

The establishment of a Campeche private sector trading company directed to the development, manufacture and marketing of artisanal wood products in direct response to offshore market demand is seen to be an optimum approach to the gaining a useful new employment generating wood product industry for Campeche.

The presence of a Campeche trading company allows effective contacts with offshore clients as well as a continuing presence in the export marketplace. The summary functions of the proposed trading company are seen to include:

- o continuing presence in international market fairs to develop production opportunity with offshore buyers (attendance at gift and table-top commercial fairs in both the U.S. and Europe,)

- o possible operation of a U.S. based order -fulfillment facility (option) (as indicated, the operation of a sales and order fulfillment service in the U. S.)

- o direct operation of a Campeche product development and production shop (development and operation of a state-of-the-art artisan wood craft shop - the shop activities would include:

- comprehensive product development
- training center for Campeche artisan producers (via producer contract)
- reception facility and shop services for visiting product developers
- production and materials purchasing facility
- installation and operation of a small scale kiln drying facility

- o- operation of an export oriented business office providing

- direct communication and negotiation with offshore market clients
- management of export documentation and export deliveries
- management of producer contracts and producer payments
- management of export packaging and packing and inland and sea freight shipping operations

- o Implementing The Trading Company

Staffing

o General Management

It is recommended that this company be led by a business oriented and business practiced Manager having a minimum of ten years of international commercial and marketing experience. The Manager must have a strong speaking and writing command of English.

o Shopmaster

The product development and production shop should be designed and operated by a skilled artisan craftsman having a minimum of ten years of shop production experience that reflects the production techniques used in U.S. and European artisan product (not furniture) shops.) This critical post may require the limited term contracting a non--Mexican technician.

The business office and product development workshop of the Trading Company will require housing in a modern ,well constructed and ample-space facility.

o - The Role of the Secretariat of Economic Development (SDE)

The promotion of the proposed Trading Company (TC) activity is suggested to be an appropriate task for the SDE. The SDE may also help provide subsequent access to international organizations that agree to provide short term technical assistance and particularly training activity directed to artisan producers participating in export production

ANNEX I-1**EMPRESAS VISITADAS POR EL SR. RAYMOND MANOFF**

**TALLER DE CARPINTERIA
SR. RAUL GONZALEZ MAURY
CALLE ECUADOR No. 99-B
SANTA ANA TEL. 6-51-25**

**FELDISEÑO
SR. JUAN CARLOS LIMON PEREZ
AV. PEDRO SAINZ DE BARANDA
PLAZA COMERCIAL AH-KIM-PECH
TEL. 1-00-30**

**MUEBLERIA TOJANA
SR. ANTONIO J. SOSA BARRERA
CALLE 55 No. 59 ENTRE 16 Y 18
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**CECATI No. 40
LIC. JOSE LUIS CUJ CASTELLANOS
DOMICILIO CONOCIDO
TEL. 3-06-25**

**MUEBLES OREZA
SR. JAVIER OREZA**

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SAMULA, CAMPECHE
TEL. 5-02-60

MISUSA
C.P. JORGE CUEVAS MELKEN
AV. REPUBLICA No. 107
ENTRE NICARAGUA Y COSTA RICA
TEL. 1-15-69

PARQUET CORCAB
ING. JOSE SANCHEZ
PARQUE INDUSTRIAL
DOMICILIO CONOCIDO
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MADERAS LAMINADAS
C.P. RAMON TREVIÑO
PARQUE INDUSTRIAL
DOMICILIO CONOCIDO
TEL. 2-03-99

ANNEX I-2**CONALEP****LIC. JULIO CESAR DURAN DEL RIVERO****DOMICILIO CONOCIDO****TEL. 3-06-57****GUITARRAS ESPINOSA****SR. WILFRIDO ESPINOSA****DOMICILIO CONOCIDO****TEL. 7-52-72****MUEBLERIA CHETUMAL****SR. DANIEL BARRERA****CALLE ALTAMIRANO No. 6-A****SAN FRANCISCO****TEL. 6-67-85****CANACINTRA****SR. MARCO A. MARRUFO ALCOCER****CALLE 61 No. 20****CENTRO****TEL. 1-36-36****FORMAS Y ACABADOS DE MADERAS Y MUEBLES, S.A.****ING. JOSE MANUEL REPETTO****CALLE BRAVO No. 63-A****BARRIO SAN JOSE****TEL. 1-30-96**

ANNEX II-1

UNIDO Forest Industry Marketing support

Campeche, Mexico 1/23/95 - 2/13/95

Seminario: "El Mercado No Perdona"

El Mercado Mundial y las Industrias Forestales en Campeche

1. Discusion: Enseñar al "Profesor"

o Problemas que tienen las industrias forestales de la península de Yucatan

- recursos naturales disponibles
- asuntos laborales
- asuntos legales, reglas de comunidad/estado, aduanas
- asuntos ambientales
- acceso de capital/creditos
- calidad de las actuales plantas de produccion
- costos y disponibilidad de elementos basicos de produccion (no laboral)
i.e. (energia, materia prima, asistencia tecnica etc.)
- conocimiento de mercado - fuentes y clase de datos
 - nacional
 - regional (America Central)
 - internacional (EEUU y Europa)

o Cuales son los objetivos principales de los participantes de seminario?

2. Demanda de Mercado

o El Mercado no Perdona

o Como funciona globalmente el sistema "market demand"

- reglas de juego - "la trinidad"

o control de calidad

o entregas - como especificada en contratos

o precio de venta (FOB) por plazo establecido

o Demanda del Mercado - Elementos

o Información - "Ventanas de Oportunidad"

- fuentes de informacion del mercado

o El Importador Internacional y Reglas de Negociacion

o El Proceso de "desarrollo de productos" como elemento

basico en el proceso: "demanda-de-mercado"

- diseño de productos y "price points"

- sistemas de producción

- desarrollo de costos y precios competitivos

- investigacion de recursos y asuntos ambientales

ANNEX II-2

- sistemas instalado para control de calidad
- empaque y embalaje
- "etiqueta" y exportacion
- la cadena de control
 - diseno
 - calidad
 - materials
 - acabado
 - costo
 - empaque
 - tiempo de entrega
 - transporte
 - documentos
 - seguimiento y comunicacion

3. Capacitacion y Demanda del Mercado

o papel para el sector publico - capacitacion basica

maquinaria : uso y manteniaminto

la fabrica limpia y la fabrica seguro

computadoras

"pride in excellence and getting it right"

o papel para el sector privado - capacitacion especifica

papel para el empresario

capacitacion teorica y practica

4. Ventanas de Oportunidad

- o tradicional y no tradicional**
- o "arena", "lana" y "ladrillos"**
- o juguetes y juegos**
- o el mercado para productos para el jardín**
- o coco**
- o muebles y partes de muebles**
- o productos artesanal y semi- artesanal**

5. Canales al Mercado

- o el concepto de "red" (networking)**
- o importancia de ferias internacionales - EEUU y Europa**
- o desarrollo de "sourcing agents"(representantes de importadores)**

ANNEX II-3

BREVE RESUMEN

CAMPECHE PUEDE ENTRAR A LOS MERCADOS INTERNACIONALES CON:

- 1.- MEJOR CONOCIMIENTO DEL MERCADO VIA CONTACTOS-DIRECTOS (ESPECIALISTAS CAMPECHANOS EN MERCADO), Y
2. ESPECIALISTA EN DESARROLLO DE PRODUCTOS (ESPECIALISTA MEXICANO QUE SIRVE COMO ENLACE TECNICO ENTRE LOS PRODUCTORES CAMPECHANOS Y EL MERCADO DEL EXTERIOR).
- 3.- CAMPECHE YA TENIA UNA VENTANA DE OPORTUNIDAD POR PRODUCTOS DE ALTA CALIDAD USANDO MEDERA TROPICAL CON FORMA DE DESPERDICIOS.

ESTOS PRODUCTOS SE PUEDEN ELABORAR EN CONDICIONES ARTESANAL Y SEMI-ARTESANAL - ES DECIR SIN MAQUINARIA COMPLICADA COMO EJEMPLO:

A: CORTA CARNES Y CORTA PAN - TABLAS Y (OTROS PRODUCTOS PARA LA COMIDA)

B: MUEBLES DESARMABLES PARA EL JARDIN

C: BASTONES

D: JUGUETES

4 COSTO Y PRECIO

PORQUE AQUI VENDEMOS EN 10 PESOS Y ALLA SE VENDEN POR 60 PESOS. ES JUSTO O NO?

5. DONDE ENCONTRAMOS LA MEJOR OPORTUNIDAD PARA LA INDUSTRIA CAMPECHANA:

EL MUNDO DEL ADORNO PARA LA CASA

PARA EL COMEDOR

PARA LA COCINA

PARA EL JARDIN

I) CAMPECHE PUEDE PENETRAR MERCADOS NUEVOS

A) SI HAY UN ENLACE PROFESIONAL DENTRO Y DEL MERCADO EXTERIOR

B) SI HAY ASISTENCIA TECNICA Y SERVICIOS COMERCIALES PARA LOS PRODUCTORES CAMPECHANOS

II) PRODUCTOS DE INTERES AHORA!

- PARA EL COMEDOR

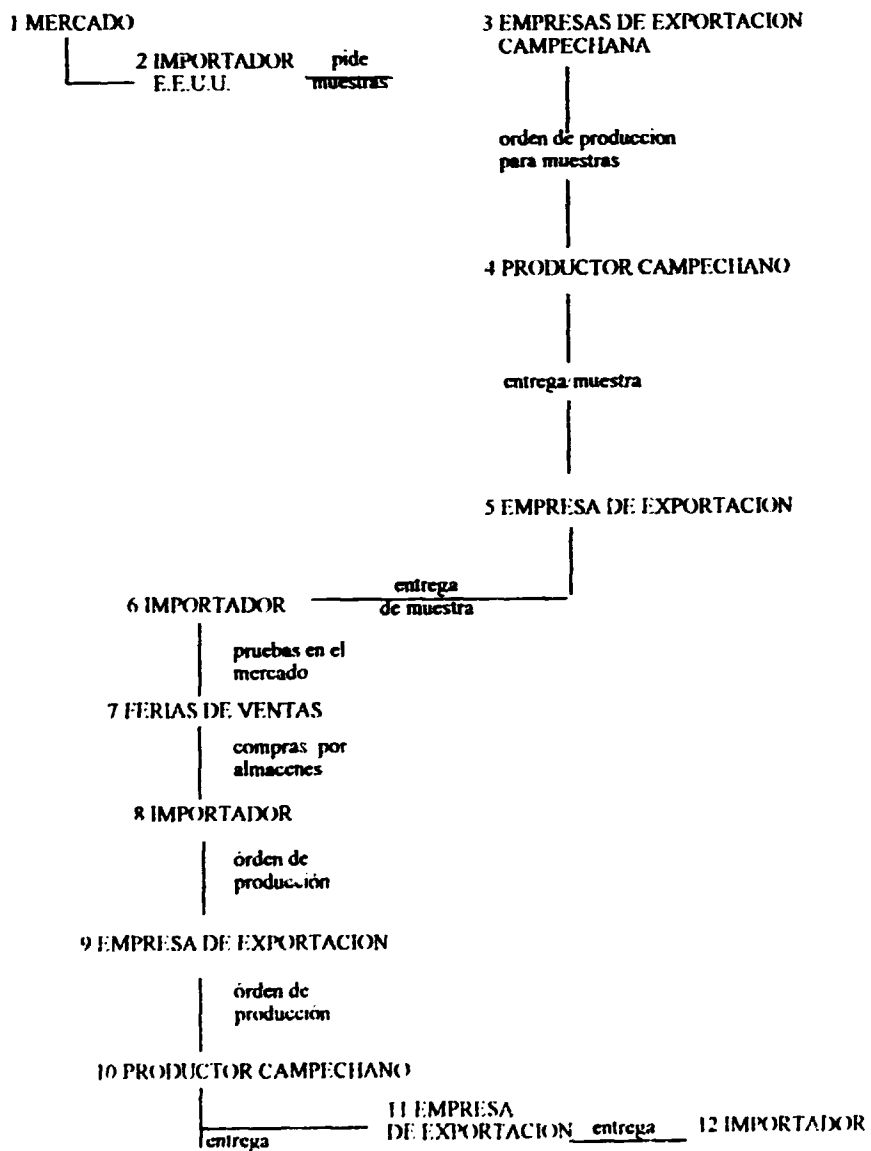
- JUGUETES Y BASTONES

- PARA JARDIN

MATERIA PRIMA: MADERA TROPICAL EN FORMA DE DESPERDICIOS.

ANNEX II 4

III) EL MERCADO DEL EXTERIOR - CANALES



ANNEX D1-1

SEMINARIO "EL MERCADO NO PERDONA"

 INST. DR. RAY-
 MONDA
 MANOFF

NOMBRE	EMPRESA O TALLER	DIRECCION	TELEFONO	ENE 27	ENE 30	ENE 31
ANDRES SANCHEZ GONGORA	CONALEP CAMPECHE	CALLE TAMAULIPAS No 103	6-64-30			
JOSE GUADALUPE PECH VIVAS		DOMICILIO CONOCIDO, PICH. CAMPECHE				
MANUEL ALEJANDRO TOLOSA RODRIGUEZ		DOMICILIO CONOCIDO, TINUN, TENABO, CAMP				
JUAN CARLOS DZIB FLORES	DESPACHO CP ELENA A PECH	DOMICILIO CONOCIDO, CAMPECHE				
SUHAIL FUENTES LUIS	DESPACHO CP ELENA A PECH		6-65-30			
LI JUAN J AGUIRRE CASTRO	DESPACHO CP ELENA A PECH		6-65-30			
GRISelda CAHUCH GONGORA	DESPACHO CP ELENA A PECH		6-65-30			
MARTINA DEL C RAMIREZ MORENO	DESPACHO CP ELENA A PECH		6-65-30			
RAFAEL LAVALLE PACHECO	MADERAS LAMINADAS DE CAMP, S.A. DE CV	AV. EL CERRO S/N PARQUE INDUSTRIAL CAMPECHE	2-04-00			
MANUEL JESUS COJOC	CONALEP CAMPECHE	CALLE DELICIAS No 11	1-09-18			
TEC ENRIQUE ROSADO SAMOS	CONALEP CAMPECHE		3-06-57			
ING ANTONIO CACH PEREZ	CONALEP CAMPECHE		3-06-57			
PROFR. ELMER PACHECO SANCHEZ	PANADERIA PACHECO		6-30-86			
PABLO JOSE CAMARA MATOS	DOM. CONOCIDO, COLEGIO DE BACHILLERES	HECELCHAKAN, CAMPECHE				
LUCIO ARREGOYTIA GARCIA	DESPACHO ELENA PECH					
ADOLFO AGUILAR G	DESPACHO ELENA PECH					
JESUS MANUEL AYALA EUGENIO	SECRETARIA DE DESARROLLO ECONOMICO	TORRES DE CRISTAL 7° PISO TORRE A				
ING ELICEO S. GONZALEZ CANO	CONALEP	CALLE PERU No 141	6-16-11			
CP SILVIA BARREDO SANCHEZ	BARREDO DIAZ, A S C		1-32-09			
ING SANTIAGO GILBERTO MORAN	BARREDO DIAZ, A S C		1-32-09			
WILFRIDO ESPINOSA B	FABRICA DE GUITARRAS	KM 1 CARR. CAMPECHE-HIAMPOLOL	7-52-72			
A. VARGAS ESPINOSA P	FABRICA DE GUITARRAS	KM 1 CARR. CAMPECHE-HIAMPOLOL	7-52-72			
LORENZO COLLI HERNANDEZ	CARPINTERIA OREZA		2-08-52			
RAUL GONZALEZ MAURI			6-51-25			
ING JOSE ALBERTO CARBALLO ORTIZ	DESPACHO CP ELENA A PECH	CALLE 57 No 41 DEPTO. 6	6-65-30			
JOSE RAFAEL CIMA CAN	DESPACHO CP ELENA A PECH	CALLE 57 No 41 DEPTO. 6	6-65-30			
JUAN IGNACIO ZETINA GUTIERREZ	TRAVIESO (PASTELERIA)	MARIANO ESCOBEDO No 52				

LUIS ECO CU BETANCOURT					
LUIS FLO CU LUGO					
LUIS HUMBERTO RAREZ CHAN	CCEC	CALLE 10 No 329 SAN RINACIO			
ING ROMEO VILLATORO D	CONSTRUCTORA GORDILLO	TORRES DE CRISTAL 9 PISO TORRE 4	1-08-64		
ROSE LUIS CU CASTELLANOS	CECATI No 40		3-08-25		
MIGUEL ESCALANTE S	MENTRAC S A DE CV	AV LOPEZ MATEOS No 283	2-55-64		
MANUEL E CHUC CAMPOS	MENTRAC S A DE CV	AV LOPEZ MATEOS No 283	2-55-64		
FRANCISCO JAVIER REJON		CALLE MARIANO ESCOBEDO No 52	6-58-41		
ROSE MOO GONGORA	COP JOSUE MOO GONGORA	CARR CAMPECHE-LERMA 5 N			
ROSA ELENA GARCIA ALVAREZ	SEDE	TORRES DE CRISTAL 6 PISO	6-91-08		
ROGELIO SANTIAGO VILLALOBOS	SEDE	TORRES DE CRISTAL 6 PISO	6-91-08		
MARCO AKE CHI	SEDE	TORRES DE CRISTAL 6 PISO	6-91-08		
ANTONIO CANTO NAAL	SEDE	TORRES DE CRISTAL 6 PISO	6-91-08		
JOSE LUIS CONDE	DESPACHO ELENA A PECH	CALLE 57 No 51 DEPTO 6	6-65-30		
C P ELENA A PECH RAMIREZ	DESPACHO ELENA A PECH	CALLE 57 No 51 DEPTO 6	6-65-30		
C P JORGE TEVAS	MISUSA	AV REPUBLICA 107	1-14-69		
FATIMA PEREZ PECH	DESPACHO ELENA A PECH	CALLE 57 No 51 DEPTO 6	6-65-30		
ANDRES MEDINA BEYTLA	CARPINTERIA	EJIDO SAN PABLO PINTUN, CHAMPOTON			

ANNEX III-2

SEMINARIO "EL MERCADO NO PERDONA"

INST. DR. RAY.

MONDA

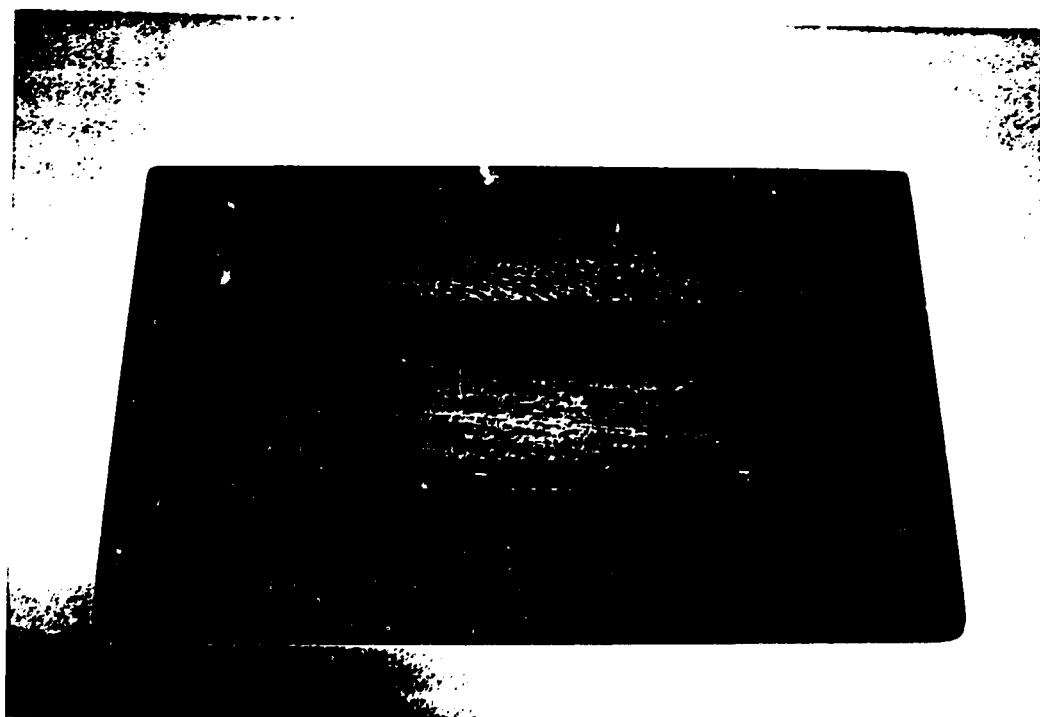
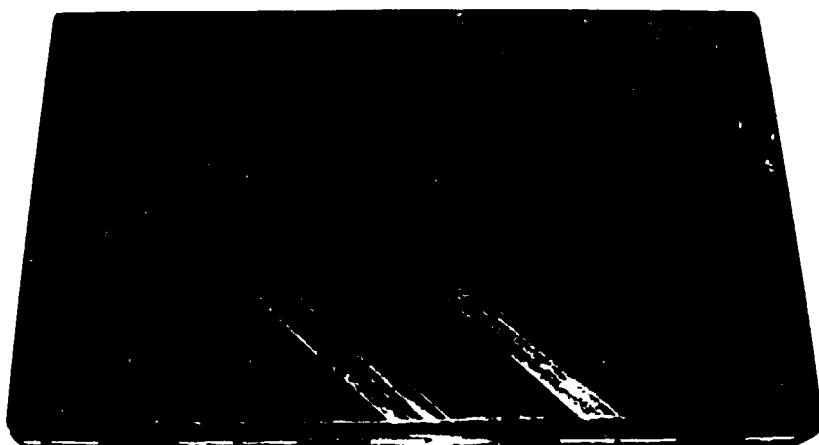
MANOFF

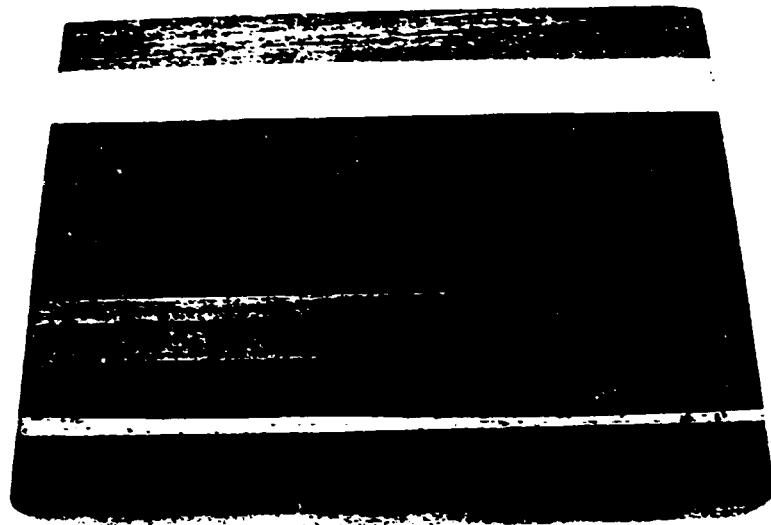
NOMBRE	EMPRESA O TALLER	DIRECCION	TELEFONO	ENE 27	ENE 30	ENE 31
LUIS JORGE CAHUICH AYIL	CARPINTERIA	EJIDO SAN PABLO PIXTUN, CHAMPOTON				
SILVIA POMPEYO VALES	CARPINTERIA OREZA	CALLE 17 No. 27 POR 8 Y 6				
EZEQUIEL PECH PECH	CARPINTERIA LOS CHEQUES	FELIPE CARRILLO PUERTO, CHAMPOTON				
VICTOR MANUEL PECH PECH	CARPINTERIA TRES HERMANOS	FELIPE CARRILLO PUERTO, CHAMPOTON				
EFRAIN MASS CUTZ	CARPINTERIA	FELIPE CARRILLO PUERTO, CHAMPOTON				
IVAN PECH	MARTILLO DE ORO	FELIPE CARRILLO PUERTO, CHAMPOTON				
ALFREDO CONTRERAS LOP'Z	MARTILLO DE ORO	FELIPE CARRILLO PUERTO, CHAMPOTON				
JOSE RAFAEL PECH	CARPINTERIA TRES HERMANOS	FELIPE CARRILLO PUERTO, CHAMPOTON				
SAMUEL CONTRERAS LOPEZ	CARPINTERIA TRES HERMANOS	FELIPE CARRILLO PUERTO, CHAMPOTON				
FRANCISCO AVILA CAMARA	CARPINTERIA	FELIPE CARRILLO PUERTO, CHAMPOTON				
JOSUE DANIEL PECH	MARTILLO DE ORO	FELIPE CARRILLO PUERTO, CHAMPOTON				
BENJAMIN RAMIREZ DZUL	MARTILLO DE ORO	FELIPE CARRILLO PUERTO, CHAMPOTON				
GABRIEL PECH	MARTILLO DE ORO	FELIPE CARRILLO PUERTO, CHAMPOTON				
ISAIAS PECH	CARPINTERIA TRES HERMANOS	FELIPE CARRILLO PUERTO, CHAMPOTON				
FERMIN PECH FHUAN		FELIPE CARRILLO PUERTO, CHAMPOTON				
EDUARDO NANCISO AKE BALAN		FELIPE CARRILLO PUERTO, CHAMPOTON				
CARLOS F. MARTINEZ C	NOVEDADES DE CAMPECHE		1-10-90			
JORGE LUIS CAMPRANIS V	CANACINTRA/COORDINACION DE FOMENTO PRODUCTIVO		6-26-81			

ANNEX 4

PHOTOGRAPHS OF TRAINING SAMPLES







7

Granadillo



Chacabuco



Ceibo



Siricote



Cedro

