TABLE 11
IMPORTS OF PULP MANUFACTURING EQUIPMENT
(U.S. $000)

	1988	1989	1990	1991
MACHINERY FOR MAKING PULP				
For shredding or making pulp from waste materials	2.9	206.3	1,093.8	490.2
For the preliminary treatment of raw materials	365.9	3,876.5	2,004.4	3,295.9
Wet presses or deckers		103.0	195.2	0
To make cellulosic pulp	1,892.2	3,117.5	3,539.6	1,176.4
Purifiers/defibrators	260.7	801.1	100.7	428.3
Laboratory research machinery	19.9	91.2	34.7	23.6
SUBTOTAL MACHINERY	**2,541.6**	**8,195.6**	**6,968.4**	**5,414.4**
PARTS FOR PULP MAKING MACHINES				
Cylinders or rollers	11.1	81.9	28.5	0.5
Cones/disks/steel segments	975.8	1,198.7	1,535.5	1,034.0
Other	1,777.0	1,681.5	2,937.5	2,145.6
SUBTOTAL PARTS	**2,763.9**	**2,962.1**	**4,501.5**	**3,180.1**
TOTAL	**5,305.5**	**11,157.7**	**11,413.7**	**8,594.5**

Source: Import data by Secretaría de Comercio y Fomento Industrial

Total imports of pulp manufacturing equipment and parts more than doubled between 1988 and 1989 in response to lower import tariffs and a more flexible financial policy. They stabilized in 1990 but fell by 24.7% in 1991 with the contraction in the industry. It is important to note, also, that in 1989 the participation of parts fell in relationship to new machinery to 26.5% and increased in 1990 and 1991 to 37%, pointing towards more maintenance of old equipment as opposed to the purchase of new one.

In 1991, the largest imports were of machinery for the preliminary treatment of raw materials, followed by machines for the manufacture of cellulosic pulp. These two product groups have traditionally dominated imports, but in the opposite order. Imports of purifiers/defibrators also grew in 1991 compared to 1990, and machinery for shredding or making pulp of rags and other textile, paper or paperboard waste has overall shown a growing trend.

Imports from the United State represent 56.9% of total machinery imports and 81.1% of part imports due to the geographical proximity, the familiarity of the end user industry with American-made equipment and a longstanding presence of U.S. firms in Mexico through local distributors and representatives. Based on Mexican data, Canada holds a 13.7% import market share in machinery and 6.7% in parts. According to Canadian data, Canadian exports of machinery and parts to Mexico amounted to Cdn$156,000 in 1991, down from Cdn1,965,000 in 1990. Other competitors in this market include Germany, Finland, Brazil and Spain.