

envelope- and container-making equipment. During 1990, imports increased by 61.8 percent as a whole, paper-making machinery by 70.8 percent and paper-product-manufacturing equipment by 55.1 percent. In 1991, the first category fell by 5.5 percent and the second grew 7.6 percent, for a total of 1.7 percent.

The participation of parts in total machinery imports increased from 22 percent in 1988 to 26.4 percent in 1989. It has, however, been decreasing (21.7 percent in 1990 and 20.5 percent in 1991). This points towards a recapitalization of the industry in order to face future demand, rather than a general overhaul and maintenance, in accordance with projected growth in the industry.

The United States, with a 54.8 percent market share, is the most important exporter of machinery to Mexico. Germany is second, followed by France, Spain, Italy, Switzerland and Canada, with a 1.9 percent market share. Total Canadian exports of paper machinery to Mexico were valued at Cdn\$251,000 in 1991, down from Cdn\$3,964,000 in 1990.

4.4 Printing and Graphic Arts

The printing and graphic arts industries include a variety of areas, the largest of which are newspapers and books.

The newsprint market is very concentrated in Mexico. Three firms, Fábricas de Papel Tuxtepec, Mexicana de Papel Periódico and Productora Nacional de Papel Destinado, cover domestic production. Furthermore, the decentralized government agency Productora e Importadora de Papel (PIPSA) controls all sales of newsprint in Mexico.

There are 30 newspapers printed in Mexico City and 320 printed throughout the country. The Mexico City papers together have a daily circulation of over three million copies, in addition to 120,000 weekly and 30,000 monthly publications. The Mexico City newspapers with the largest daily circulation, ranging between 100,000 and 400,000, are ESTO, La Prensa, Novedades, El Herald, Ovaciones, Excelsior, El Financiero, El Universal, El Nacional, La Afición, Uno más Uno, and La Jornada.

The book publishing and printing industry is one of the largest consumers of fine writing and printing paper in Mexico and is comprised of approximately 600,000 establishments. The most important single sector is the printing of government free texts or

school books, which are distributed to the over 16 million primary school students. In 1959, the government imposed the sole and free textbook, and has ever since been in charge of its publication. In 1990, the National Commission for the Free Textbook (Comisión Nacional de Texto Gratuito [CONTEG]), printed 90 million books, 63.3 percent of the total textbook sector of the industry.

There are 1,234 publishing houses in Mexico, in which 881 are private companies, 11 universities, associations and institutions, 100 government offices and 65 personal publishers. The total number of publishers registered with the National Chamber for the Mexican Publishing Industry has fallen from 1,325 to some 850 in the past decade, due to the overall crisis the book industry is facing and the increased competition from imports, which were valued at \$80 million in 1990. Exports, on the other hand, reached \$32 million and have averaged only 15 percent to 20 percent of total sales of the industry.

The publishing industry is highly concentrated: 7 percent of the companies produce 75 percent of the books in circulation.

Table 23: MEXICAN PUBLISHING INDUSTRY IN 1990

	# of books
Text books	48 million
Social sciences	16 million
Science and technology	15 million
Children and young age books	15 million
Other	14 million
Practical books	11 million
Fascicles	9 million
Literature	7 million
Dictionaries & encyclopaedias	6 million
Art books	1 million
Total	142 million

In 1991, the Mexican publishing industry produced 21,500 titles, of which 66 percent were reprints (14,254); 23 percent (4,879) were new titles, an average way below that of other developed countries; 11 percent (2,367) were re-editions. Table 23 gives a breakdown of some of the types of books that are published in Mexico.

The average number of copies printed of any one book tend to be low in Mexico as compared to other