

clearly reflects the demand for pulp and its relative changes because it excludes price fluctuations, imports represented 35.2 percent of total demand in 1988. As a result of a 23.6 percent fall in pulp imports in 1989, the market share dropped to 29 percent. In 1990, pulp imports recovered, increasing 17.5 percent, from 314,000 tons to 369,000 tons. In 1991, despite a 3.3 percent fall in import volume, the overall market share grew to 33.6 percent because domestic production decreased at an even faster pace than imports.

In terms of value, imports fell year after year between 1988 and 1991, from U.S.\$258.8 million in 1988 to U.S.\$192 million in 1991. The imported component of the market also decreased from 35.2 percent to 30.5 percent in 1991. Preliminary data for 1992 point to an 11.3 percent recovery in imports, thereby increasing market share to 33 percent for that year. By 1995, imports are expected to reach U.S.\$244.5 million, 32.2 percent of the total market.

Table 5: MEXICAN IMPORTS OF PULP AND SECONDARY FIBRES (U.S. \$ millions)

	1988	1989	1990	1991
Pulp Classification 1				
Mechanical wood pulp	16.9	15.6	3.4	5.6
Chemical wood pulp				
White wood pulp	116.8	128.0	124.8	101.0
Short-fibre wood pulp	42.8	41.1	44.3	36.0
Unbleached wood pulp	15.2	2.7	3.4	3.4
Semi-chemical wood pulp	0	9.1	20.2	15.7
Other	67.1	32.9	32.8	30.3
Subtotal	258.8	229.4	228.9	192.0
Pulp Classification 2				
Mechanical wood pulp	16.9	15.6	3.4	5.6
Chemical wood pulp of alpha-cellulose, dissolving grades	63.9	31.7	31.1	28.8
Soda or sulphate, non-dissolving grades				
Coniferous, unbleached	15.1	2.6	3.4	3.4
Non-coniferous, unbleached	2.9	0.4	0	0
Coniferous, bleached	116.4	127.4	123.9	99.7
Non-coniferous, unbleached	40.0	40.7	44.1	36.0
Sulphite	3.0	0.8	1.3	1.4
Semi-chemical wood pulp	0	9.1	20.2	15.7
Pulp or other materials	0.6	1.1	1.5	1.4
Subtotal	258.8	229.4	228.9	192.0
Secondary Fibres				
Brown	29.0	46.3	45.0	49.4
White	69.3	92.1	74.6	62.8
Newsprint	32.6	34.3	31.4	28.5
Other	17.5	4.7	4.9	5.8
Subtotal	148.4	177.4	155.9	146.5
TOTAL	407.2	406.8	384.8	338.5

Source : Secretaría de Comercio y Fomento Industrial

Total imports of raw materials for the manufacture of paper, including pulp and secondary fibres, has steadily fallen since 1988, from \$407.2 million to \$338.5 million in 1991. Imports of secondary fibres have fallen at a slightly slower pace. Imports of mechanical wood pulp and of other pulp and secondary fibres have decreased the most quickly. White wood pulp, short-fibre wood pulp, white secondary fibres and newsprint decreased more slowly. Semi-chemical wood pulp and brown secondary fibres from kraft paper were the only imports to increase between 1988 and 1991 (see Table 5).

In terms of their relative participation in 1991, white wood pulp was the largest category (29.8 percent), followed by white secondary fibres (18.6 percent), brown secondary fibres (14.6 percent), short-fibre wood pulp (10.6 percent), other pulp (9 percent), printed newspaper (8.4 percent), semi-chemical wood pulp (4.6 percent) and other (4.4 percent).

Table 6: IMPORT MARKET SHARE BY CATEGORY

	1982 (%)	1988 (%)	1991 (%)	1991 (000 tons)
Chemical wood pulp				
Sulphate	19.0	44.2	41.8	617.5
Sulphite	60.2	0	100.0	2.7
	0	0	0	237.1
Chemical from annual plants	25.5	27.6	35.3	167.1
Mechanical wood pulp	0	0	n/a	0
Other				
	14.7	32.0	31.3	1,024.4

Source : Memoria Estadística 1992, CNICP

The import market share has more than doubled in the past decade (see Table 6). Apparent consumption of sulphite chemical wood pulp is totally met by imports; domestic production disappeared in 1986. On the other hand, chemical pulp from annual plants is met by domestic production, basically from sugar cane bagasse. Imports account for 41.8 percent of sulphate chemical wood pulp, the largest segment of the market, and for 35.3 percent of mechanical wood pulp consumption.

The United States, with a 92 percent market share in 1991, is the most important supplier of pulp and secondary fibres to Mexico. Geographical proximity plays a major role in this leadership as transporta-