

training. The total market assessment has therefore to be taken as an approximation only.

The domestic production of items here analyzed is heavily concentrated into computers, which represent 77% of total production, as well as 98% of total exports within apparent consumption. This is due to the presence in Mexico of assembly plants of the world's largest computer manufacturers, such as IBM, Hewlett Packard, Unisys, CDC, Honeywell, DEC, NCR, etc.

Local manufacture of furniture for classrooms also plays a major role, since it accounts for 90% of that market segment. In all other areas, domestic production is limited to basic items. All of the more sophisticated equipment, such as movie, slide, microfiche and overhead projectors, video equipment, flight simulators, specialized software for education and other therapeutic and educational materials are of imported origin, mostly because the volume of demand is too low to allow for economies of scale in production and locally made products are therefore not competitive locally or internationally.

Total imports by category and the proportion estimated to be used for training and educational purposes are listed in Table 2.

TABLE 2
TOTAL IMPORTS OF TRAINING AND EDUCATIONAL
RELATED SYSTEMS AND EQUIPMENT
(\$000 dollars)

	1987	1988	1989	% used for education
Computers	143,600	182,900	238,200	5%
Software	68,880	89,100	111,380	5%
Film projectors	994	522	451	100%
Other projectors	1,964	2,073	2,605	100%
Closed circuit TV	967	1,006	1,035	100%
Microphones	1,036	1,665	2,387	10%
Video equipment	22,743	74,369	118,520	5%
Scale models	2,514	1,729	1,916	50%
Flight simulators	1	3	0	100%
Furniture	208	512	1,007	100%
Therapeutic and educational material	225	162	491	100%
TOTAL	243,131	354,038	477,992	

Source: Import data published by SECOFI

The United States is the largest single supplier of training and educational systems and equipment to Mexico with a 70% global import market share. It is particularly strong in the area of computers and software, where it dominates imports with 80% of the market, due to the presence in Mexico of all major U.S. manufacturers. In the area of projectors, U.S. products are in highest demand (85%) with minor imports from Japan, Panama and Brazil, the latter benefiting from preferential tariffs as a member of ALADI. Microphones and video equipment are imported mainly from Korea and Japan, scale