

Table 2: TOTAL APPARENT CONSUMPTION OF PULP (000 tons)

	1986	1987	1988	1989	1990	1991e
Production	772.5	780.5	809.2	799.0	771.8	705.1
+ Imports	345.5	470.6	411.1	314.0	369.0	356.7
- Exports	0	20.3	52.5	31.1	23.3	0.9
	1,118.0	1,230.8	1,167.8	1,081.9	1,117.5	1,060.9

e = estimated

Source : Memoria Estadística 1992, CNICP

Note: This table includes only definitive imports. Temporary imports, used mainly in the Mexican in-bond industry, are excluded because production data do not include maquiladora operations.

Based on these figures, total apparent consumption, in terms of volume, grew by 10 percent in 1987, driven mostly by increased imports, but decreased in 1988 and 1989 as a result of the reduction in domestic production and a fall in imports. The market grew by 3.3 percent in 1990 but fell to 1,061 million tons in 1991 (See Tables 1 and 2).

In addition to pulp, the use of secondary fibres in the domestic manufacture of paper is increasing. Mexico is known as one of the most active countries worldwide in the use of recycled fibres. The total content of recycled fibres can reach 67 percent. Recently (this paper was prepared in January 1993), the Mexican Secretariat for Social Development (SEDESOL), which regulates matters related to the environment, issued an official norm regulating the minimum contents of recycled fibres in the manufacture of newsprint. The norm has not yet been approved. According to this norm, newsprint will require a 50 percent recycled fibre content by 1995. Currently, a 30 percent minimum recycled fibre content is required. This will be increased to 40 percent in 1994. The norm of 50 percent recycled fibres is expected to be approved in the near future.

Table 3: MEXICAN MARKET FOR SECONDARY FIBRES (U.S.\$ millions)

	1988	1989	1990	1991	1992e	1995p
Production	190.9	194.7	227.3	218.9	236.8	276.5
+ Imports	148.4	177.4	155.9	146.5	161.0	210.9
- Exports	0.3	0.3	0.2	0.4	0.3	0.4
	339.0	371.8	383.0	365.0	397.5	487.0

e = estimated based on January-June data, p = projected

Source : Secretaría de Comercio y Fomento Industrial (SECOFI) and the Statistical Memoir of the National Chamber for the Pulp and Paper Industries

Table 4: TOTAL APPARENT CONSUMPTION OF SECONDARY FIBRES (000 tons)

	1988	1989	1990	1991	1992e
Production	980.8	1,046.5	1,273.1	1,242.0	1,314.0
+ Imports	787.1	919.3	874.7	935.5	1,057.0
- Exports	0	0	0	0	0
	1,767.9	1,965.8	2,147.8	2,176.5	2,371.0

e = estimated

Source : Memoria Estadística 1992, CNICP

Total apparent consumption of secondary fibres has not followed the downward trend of the market for pulp (See Tables 3 and 4). In terms of volume, apparent consumption grew by 11.2 percent in 1989, 9.3 percent in 1990 and 1.3 percent in 1991, to reach a total consumption of 2.2 million tons. Preliminary data for 1992 place consumption at 2.4 million tons, 8.9 percent above 1991 levels.

In terms of value, the growth pattern is lower as a result of the influence of price. While the market grew by 9.7 percent in 1989 and 3 percent in 1990, in terms of value, it fell by 4.7 percent in 1991 to U.S.\$365 million. Preliminary data for 1992 place apparent consumption at U.S.\$397.5 million. An overall annual growth rate of 7 percent is projected for the 1992-1995 period, placing total consumption of secondary fibres at U.S.\$487 million by 1996.

3.2 Imports

Imports have played a significant role in the Mexican market for pulp, mostly because local production has been unable to meet demand due to the structural problems of the Mexican forestry and wood industries. In terms of volume, which more