

tons in 1991, while paper production amounted to 2.9 million tons and is growing steadily. The uses of paper in Mexico, in order of importance, are: packaging, writing and printing, other paper and cardboard, newspapers and free textbooks, sanitary and facial paper and finally, special applications.

- The mining industry consists of over 6,000 mining enterprises, of which 144 are considered large and account for 82% of Mexico's mining exports. The remaining companies are either small or medium sized and basically supply local demand. State majority owned companies still play a major role in this industry, but the massive sale of government owned companies will lead to state control of only five companies, mining minerals considered strategic: iron, coal, sulphur, phosphorous and potassium. Mexico holds first places in world production of several metals and minerals: first place in production of silver, bismuth, sodium sulphate and celestine; second in barite; third in antimony, fluorite, and graphite; fourth in mercury; and fifth in arsenic, cadmium and molybdenum. Mexico's production of non-ferrous industrial metals was 812,000 tons, that of steel related metals 12 million tons, and that of non-metallic minerals 15.4 million tons in 1990.

- Mexico's steel industry is composed of four large, fully integrated manufacturers, which cover all five basic production processes: concentration of iron ore and production of coke; production of primary iron or fusion; production of pig and sponge iron; production of steel; and production of final products. These companies are the government owned SIDERMEX complex (Altos Hornos de México AHMSA and Siderúrgica Lázaro Cárdenas - las Truchas SICARTSA), which is now in the process of being totally restructured, and the private owned Hojalata y Lámina (HYLSA) and Tubos de Acero de México (TAMSA). These together produced close to eight million tons of steel in 1991 and they account for 86% of total production by the industry and 65% of employment. Additionally, there are 23 semi-integrated firms and 44 mill rollers with a total installed capacity of 11.6 million metric tons.

- The cement industry presently consists of over 30 plants concentrated in a relatively small number of large producers, ten of which are among the country's 500 largest companies: Cementos Mexicanos, Cementos Tolteca, Cementos Guadalajara, Cementos Apasco, Cementos de Veracruz, Cementos de Chihuahua, Concretos Apasco, Cementos Tolteca, Latinoamericana de Concretos and Tubos DYSA. These companies together reported sales of one billion dollars in 1990. Total installed capacity is estimated at 30 million tons and the cement companies have projects to expand this capacity by 35% in the next four years.

- The automotive industry is concentrated in a small number of large firms, which together operate 15 plants, 10 of which are American, three Japanese and two German. Total production of