

with those listed in Table 1, unless the temporary import component is added into it.

**TABLE 2**  
**TOTAL APPARENT CONSUMPTION OF WOOD**  
(VOLUME - 000 m<sup>3</sup>)

	1986	1987	1988	1989	1990	1991e
Production	6,095	6,635	6,229	6,096	5,708	5,607
+ Imports	217	173	493	540	826	1,211
- Exports	618	829	955	1,092	692	517
<b>TOTAL</b>	<b>5,694</b>	<b>5,979</b>	<b>5,767</b>	<b>5,544</b>	<b>5,842</b>	<b>6,301</b>

Source: Memoria Económica 1991-1992 - CNIF

Based on these figures, total apparent consumption in terms of volume decreased in 1988 and 1989 as a result of the reduction in domestic production of lumber and wood and despite an increase in imports. The market grew by 5.4% in 1990 and was estimated to have grown 7.9% in 1991. As can be seen, imports began growing significantly starting in 1988 with Mexico's trade liberalization policies. While they represented 2.9% of consumption in 1987, they were estimated to represent 19.2% in 1991 and final data for 1991 point towards an even higher participation. Domestic production, as well as exports, have fallen year after year since 1988 as a result of the inefficiencies and legal difficulties faced by the industry.

### 3.2 IMPORTS

The large volume of imports is due mostly because local production has been unable to cover demand due to the structural problems of the Mexican forestry and wood industries. This upward trend in imports has been felt since 1982, when imports were at their all time low as a result of the economic crisis and the high import barriers imposed by the government at the time, including import permit requirements and ad valorem duties.

Imports play an important role in total apparent consumption and their participation has increased significantly during the period analyzed. While, in terms of value, they represented only 6.5% of total apparent consumption in 1988, their participation increased to 10% in 1990 and grew to 22.5% in 1991, with the 147% increase in total imports during that year, coupled with a stagnant local production.

The following table shows imports of wood and wood products between 1988 and 1991.