

imports accounted for 11% of total apparent consumption in 1988, when the import permit was temporarily removed, they fell to 5% in 1990. As long as the import permit requirement is still in effect, imports of poultry will be limited. It is however possible that it could be eliminated under the free trade agreement negotiations, allowing for a major entry of foreign products if they are price competitive.

TABLE 8
APPARENT CONSUMPTION OF POULTRY
(000 tons)

	1988	1989	1990
Production	654.3	611.0	756.5
+ Imports	78.0	42.4	39.1
- Exports	0	2.5	5.8
TOTAL	732.3	650.9	789.8

Imports of poultry can be divided into the following categories in 1990: Turkey 6%, ducks and geese 2%, whole chicken, hens and roosters 7%, chicken pieces 38%, livers 47%. The proportion of livers has been increasing from 15% in 1988 to 47% in 1990, while that of chicken pieces has been decreasing from 65% in 1988 to 38%. Prime chicken pieces, in particular the breast but also the legs, are rarely price competitive in Mexico, but offals generally are. In the past, U.S. sanitary regulations indicated that poultry frozen for more than 3 months was no longer fit for direct human consumption. The price on this meat therefore dropped and became competitive in Mexico.

3.2 LOCAL PRODUCTION

Of the total Mexican territory of 197 million hectares, 124.6 million hectares, or 63% are pastures used for livestock, of which 70 million ha. are underbrush, 22 million ha. pastures, 16 million ha. have special grasses and 25 million ha. are pasturelands developed through the over exploitation of forests. Of the total pastureland area, 94% is used for extensive livestock raising in the Center, North and dry tropic areas, while the remainder is for semiintensive, semiextensive and occasional use; 60% of total pasturelands are of communal property, while the other 40% correspond to small private properties.

Mexico's livestock industry can be grouped into five areas of the country (see Map 1): The North (Coahuila, Chihuahua, Durango, Nuevo León, San Luis Potosí, Tamaulipas and Zacatecas); the North-Pacific (Baja Californias, Nayarit, Sinaloa, Sonora); the Gulf (Campeche, Tabasco, Veracruz, Yucatán, Quintana Roo); the Center (Aguascalientes, Guanajuato, Hidalgo, Jalisco, México, Michoacán, Morelos, Puebla, Querétaro, Tlaxcala and the Federal