

Production of Wood Pulp

'000s of tonnes

	1993	1994
Bleached wood	92.7	57.7
Short sulphate fibre	27.7	27.7
Non-bleached wood	88.4	74.2
White plant fibres	121.3	116.7
Non-white plant fibres	0.1	0
Mechanical paste	13.4	0
Total	343.6	276.3

Source: *Cámara Nacional de las Industrias de la Celulosa y del Papel (CNICP)*, National Chamber of the Pulp and Paper Industry.

internationally competitive, especially in comparison with most other domestic wood products. In 1993, the industry supplied 89 percent of domestic consumption. The industry also exports to several countries, but mainly to the United States.

Wood Pulp

In Mexico, wood pulp is known as *celulosa*, or cellulose. The cellulose industry has been adversely affected by trade liberalization. Domestic production fell from 551,000 tonnes in 1988 to only 276,300 tonnes in 1993 and by another 20 percent in 1994 alone. The industry suffered from a world oversupply of pulp between 1991 and 1993, and at least four Mexican pulp plants were shut down. The recovery of prices in 1994 and the devalued peso have allowed two of them to reopen. Mechanical production of wood pulp ceased altogether in 1994, following a steady drop from 118,100 tonnes in 1988 to 13.4 tonnes in 1993.

Technology

The wood industry as a whole suffers greatly from the use of outdated technology. Obsolete equipment makes it difficult to use the whole tree. Sometimes as much as half the tree is wasted. New technologies have been tested, but they typically encounter an uneducated labour force that is

reluctant to accept new methods. The dynamics of the industry make short-term exploitation more attractive than long-term resource management.

THE ROLE OF IMPORTS

Imports of forest products into Mexico have increased steadily since the process of trade liberalization began in the late 1980s. By 1994, import penetration for wood products was about 57 percent. The sharp devaluation of the peso in December 1994 resulted in an abrupt reversal

Mexico Wood and Cellulose Imports from Canada

US \$

Product	1991	1992	1993	1994
Sawdust and wood waste	208	685	1175	165
Charcoal	0	0	165	2044
Wood in the rough	0	65,651	149,083	1,114,862
Wood wool	0	0	0	2800
Railway sleepers	0	0	30762	0
Coniferous wood, sawn or chipped	70,242	1,088,133	1,008,926	989,566
Oak wood, sawn or chipped	0	0	24,470	109,772
Nonconiferous wood, sawn or chipped	77,813	50,350	352,888	241,761
Sheets for veneer and plywood	0	18,967	155,576	279,069
Wood, continuously shaped	722	38,654	69,420	63,268
Particleboard	2,289	28,388	61,999	27,255
Fibreboard	29,523	29,070	77,806	305,680
Plywood	19,035	33,851	29,317	95,985
Densified wood	0	219,074	199,801	11,215
Cases, boxes, crates etc.	1,407	2,453	4,940	4,603
Pallets and other load boards	5,282	67,194	552,035	360,740
Casks, barrels and vats	0	0	1,409	1,772
Tools and handles	51,619	221,188	165,792	59,717
Value-added building components	58,492	9,003	81,751	171,659
Mechanical wood pulp	348,778	3,268,727	2,910,818	0
Chemical wood pulp, dissolving	0	42,013	85,501	235,549
Chemical wood pulp, soda or sulphate	6,739,312	8,598,693	15,405,339	20,622,420
Chemical wood pulp, sulphite	526,744	624,399	72,277	39,583
Semichemical wood pulp	14,273,207	11,245,500	11,361,431	30,471,864
Total	22,204,673	25,651,993	32,802,681	55,211,349

Source: *Secretaría de Comercio y Fomento Industrial (SECOFI)*, Secretariat of Commerce and Industrial Development.