

TABLE 4
APPARENT CONSUMPTION OF TECHNICAL
AND EDUCATIONAL BOOKS AND MAPS
(000 \$ dollars)

	1987	1988	1989	1994p
Production	146,600	154,534	163,441	198,851
+ Imports	20,094	24,814	40,233	56,429
- Exports	12,123	12,105	13,453	17,170
TOTAL	154,571	167,243	190,221	238,110

The total market for educational and training books, maps and charts in Mexico was estimated at \$190.2 million in 1989. This represented a 14% increase as compared to the \$167.2 million of 1988. Imports have traditionally covered between 10% and 13% of total apparent consumption. As a result of Mexico's trade liberalization policies and a favorable exchange rate, imports of books now represent a significantly higher proportion of the market, or 21%. However, the general structure of the market will not change significantly in the future, since domestic production is very important.

The Mexican book publishing industry ranks second after Spain in Spanish language publications. There are approximately 200 publishing firms in Mexico, employing close to 10,000 persons. In 1989 over 10,000 titles were published, of which 70% were reprints and 30% new titles. A total of approximately 100 million books were printed on the following subjects: general 39%, philosophy 2%, religion 3%, social sciences 13%, languages 10%, sciences 11%, technology 6%, arts 1%, literature 11%, geography and history 3% and children's books 1%. Of the total of books, 76% were originally written in the Spanish language and the remainder translated from other languages, mostly from English (20%). Additionally, over 40 million textbooks were published (excluding official textbooks) for the following grades: preschool 10%, primary 15%, secondary 41%, high-school 17% and college 17%. Mexico exports books to the U.S. and various Latin-American countries, mostly on general subjects, technology and social sciences.

In 1989, Mexico imported close to ten million books and over 15,000 titles, most of which were in the areas of general subjects, literature, technology, religion and philosophy. Total imports were valued at \$79.8 million in 1989, up from \$49.2 million in 1988. This growth was mostly due to the relative decrease in the cost of imported books, due to a favorable exchange rate, in conjunction with the increase in general purchasing power of the population since 1987. Educational books and those used for training are estimated to represent approximately half of those imports. Additionally, imports of maps and charts for education amounted to \$226.4 thousand in 1988 and \$310 thousand in 1989. It is expected that the book market will grow at an average annual rate of five percent in the next five years. Imports from the U.S. represent 50% of total imports of books, followed by Spain (33%), Argentina (3%), France (2%) and West Germany (1%). Canadian exports to Mexico increased from Cdn\$34,000 in 1988 to Cdn\$138,000 in 1989, while imports from Mexico were Cdn\$90,000 in 1989.