

4.2 END USERS

The most important end user sectors for paper are printing and graphic arts, packaging, sanitary and tissue products and stationery. The most relevant of these will be analyzed below.

4.2.1 PRINTING AND GRAPHIC ARTS

The printing and graphic arts industries include a variety of areas, the largest of which are newspapers and books.

The newsprint market is very concentrated in Mexico, with three firms, Fábricas de Papel Tuxtepec, Mexicana de Papel Periódico and Productora Nacional de Papel Destinado, covering domestic production. Further, the decentralized government agency Productora e Importadora de Papel (PIPSA) exclusively controls all sales of newsprint in Mexico. There are 30 newspapers printed in Mexico City and a total 320 printed throughout the country. The Mexico City papers together have a daily circulation of over three million copies, in addition to 120,000 weekly and 30,000 monthly publications. The Mexico City newspapers with the largest daily circulation, ranging between 100,000 and 400,000, are:

ESTO
La Prensa
Novedades
El Heraldó
Ovaciones
Excelsior
El Financiero
El Universal
El Nacional
La Afición
Uno más Uno
La Jornada

The book publishing and printing industry is one of the largest consumers of fine writing and printing papers in Mexico and comprises over 600,000 establishments. The most important single sector in this area is the printing of the government free text or school book, which is distributed to the over 16 million primary school students. Since 1959, the government imposed the sole and free textbook, and has since then been in charge of their edition and printing. In 1990, the National Commission for the Free Textbook (Comisión Nacional de Texto Gratuito - CONTEG), printed 90 million books, covering 63.3% of the total textbook sector of the industry.

Official data indicate that there are 1,234 editors inscribed in the ISBN, of which 881 were private companies, 11 universities, associations and institutions, 100 government offices and 65 personal editors. The total number of editors registered with the National Chamber for the Mexican Editing Industry has fallen from 1,325 to some 850 in the past decade due to the overall crisis the