

**TABLE 13**  
**TOTAL APPARENT CONSUMPTION OF PAPER**  
**VOLUME**  
(000 tons)

	1986	1987	1988	1989	1990	1991e
Production	2470.2	2574.6	2593.6	2736.8	2870.9	2895.9
+ Imports	70.7	66.3	143.7	173.7	255.7	464.0
- Exports	135.7	243.1	252.6	200.9	167.8	120.3
<b>TOTAL</b>	<b>2405.2</b>	<b>2397.8</b>	<b>2484.7</b>	<b>2709.6</b>	<b>2958.8</b>	<b>3239.6</b>

Source: Memoria Estadística 1992 - CNICP

Based on these figures, total apparent consumption in terms of volume practically remained constant in 1987 despite a fall in imports, but then increased in 1988 by 3.6%. Between 1988 and 1991 the market has followed a fairly constant and high growth pattern of 9.1% to 9.5% per annum to reach a total production volume of 3.2 million tons in 1991. Total apparent consumption of paper in volume can further be divided into the following categories in 1991:

CATEGORY	VOLUME (000 tons)	%
Newsprint & textbook paper	443.3	13.7%
Writing and printing paper	596.9	18.4%
Packaging paper	1,670.5	51.6%
Sanitary and tissue paper	370.8	11.4%
Special papers	158.2	4.9%

#### 4.1.2 IMPORTS

Tables 11 and 12 show how imports have come to play an increasingly significant role in the Mexican market for paper, mostly because local production has been unable to cover demand due in part to the structural problems which have limited the supply of inputs for the industry, coupled with an overall decrease in world paper prices, which have made imports cheaper and more attractive. In terms of volume, the import market share decreased during the 1982-1986 period from 12.4% to 2.8% in response to the import restrictions imposed after the 1982 economic crisis. Import duties in the paper industry were lowered from 45% to 5%-10% in 1986, bringing about a steady increase in the imported market share of apparent consumption. This market share reached 5.8% of total demand in 1988 and further increased to 6.4% in 1989, 8.6% in 1990 and 14.3% in 1991. Total imports increased in volume by 20.9% in 1989, 47.2% in 1990 and another 81.5% in 1991. January-June figures for 1992 already show a 124.5% increase in paper imports compared to the same period in 1991.