# MEXICO
## MARKET PROFILE

FOREST PRODUCTS
SOUTH CAROLINA

South Carolina
Forestry Commission

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This report summarizes a study conducted by the South Carolina Forestry Commission on this Latin-American market during the second half of 2019 and is intended to help the U.S. southern states' forest products sector (producers, manufacturers, traders, and policy-makers) in examining and preparing for the opportunities this market may offer, by providing them with detailed information on Mexico's economics, forest products trade and international contacts. This document should be used as a reference, and in conjunction with primary market information from key forestry organizations, to help formulate strategies to participate in the Mexican market. The South Carolina Forestry Commission will not be held liable for misuse or misinterpretation of information within this document.

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# INTRODUCTION

Mexico's $1.15 trillion GDP and its population of almost 130 million make it the second-largest market in Latin America[1] and the 11th-largest economy in the world [1, 2]. This country has a robust, diversified, stable economy and strong relations with the United States; it is open to trade and private investment. During 2015–2017, the economy grew at an average annual rate of 2.74% and in 2018 witnessed an economic growth of 2.15% [3].

The Mexican construction industry observed total revenues of $14.1 billion in 2017, and its performance is forecast to grow 1.9% annually between 2017 and 2022 [4]. A growing young population and rising income are expected to yield a strong demand for housing, particularly in the bigger cities. Non-residential construction, already the industry's most lucrative sector, is projected to benefit from the new government's spending policies. As interest in substitutes for traditional building materials grows, research for new alternatives, particularly forest products, is gaining more relevance.

Mexico is becoming more and more committed to sustainable building, with Mexico City leading the county in green building despite once being named the most polluted city in the world. Materials such as wood are being used increasingly often in construction [5].

Forests cover 45% of the national territory, and 61% of forests are the communal property of ejidos[2] and communities. Yet demand exceeds timber production by a factor of three [6].

# ECONOMIC ACTIVITY

## Production

Over the past two decades, the Mexican wood products industry has suffered a steep decline in production levels, from 9.4 million $m^3$ in 2000 to 5.5 million $m^3$ in 2011 – a 42% reduction – followed by a period of slow recovery, leading to the 7.1 million $m^3$ mark in 2017 (Fig.1) [7], [8]. Historically, the states of Durango and Chihuahua have accounted for almost half of the industry's output. In 2017, wood production from Durango amounted to 2.2 million $m^3$ and that of Chihuahua to 1.1 million $m^3$, corresponding to 32% and 16% of the nation's total, respectively (Fig. 2).

Together with other top states such as Tabasco, Veracruz and Michoacán, these represented almost 70% of Mexico's forest product output. More than half of the production usually consists of lumber: in 2017, for instance, this commodity accounted for 62.4% of the industry's total, whereas woodpulp, charcoal and panels accounted for 14.8%, 6.3% and 5.9% respectively (Fig. 3). Most of the growth observed over the 2011-2017 period was driven by woodpulp, lumber and panels.

Figure 4 shows the composition of production by commodity and state in 2017. Mexico's wood production is composed mainly of softwood species: in 2017, this group alone represented 73.9% of the volume processed by the sector. Those of hardwoods and tropical species corresponded to 20.4% and 57.0%, respectively. More specifically, pine species accounted for 70.6% of the material processed in 2017; oak species represented 9.6% and other hardwoods for 10.8%.

## Consumption

Mexico's combined consumption of solid wood, woodpulp and paper products amounted to 20 million cubic meters on average between 2012 and 2016 [7]. Over this period, the domestic production from these sectors corresponded to 26.2% of the country's total demand[3], whereas the supply coming from other countries represented approximately 73.8% of Mexico's use for the period.

Moreover, the average balance of trade – the difference between exports and imports – amounted to a deficit in exports of $5.9 billion over these five years. Specific examples are recently found in lumber, panels, and paper/paperboard, which observed exports corresponding to only 2%, 4% and 13% of their imports in 2018, respectively [9].

## Exports

Mexico's forest products exports amounted to $3.2 billion in 2018, which represented a 7.7% increase from 2017. Moreover, since 2009, the country has observed its longest period of continuous growth over the last three decades. Historically, most of Mexico's forest products exports have corresponded to paper and paperboard products, furniture, and solid wood products. In 2018, these sectors represented 52% ($1.7 billion), 32% ($1 billion) and 15% ($0.5 billion) of the country's total respectively, for a combined 99%. Other sectors, such as woodpulp and wood chemicals, accounted for the remaining 1%. Across these five sectors, Mexico has found in the U.S. its major trading partner, which in 2018, was the destination for 85% of all Mexican forest products exports. In a distant second place, Canada accounted for 4% also in 2018. On paper and paperboard products, the breakdown of 2018 exports corresponded

Our Lady of Guadalupe Basilica in the Centro Histórico district of Mexico City, foreground, looks northwest to the city's modern skyline.

to U.S. 80%, Canada 3%, and Costa Rica 2%, whereas other countries accounted for the remaining 14%. The top commodities traded in this sector are cartons, boxes, and other packing containers, sanitary paper and towels, and coated paper. Most of the furniture manufactured in Mexico for markets overseas in 2018 ended in the U.S. (91% of the total value of exports) and some in Canada (2%) and other markets (2%). At least 38% of Mexico's furniture exports corresponded to upholstered seats with wooden frames, 17% to bedroom furniture, 9% to kitchen and office furniture, and the remaining 36% to other types of wood furniture. The U.S. accounted for 92% of all Mexico's solid wood products exports in 2018, China and Canada for 2% each, and other countries for the remaining 4%. Most of this sector's exports corresponded to articles of wood such as cloth hangers (31%), wood molded/tonged/grooved (21%), doors and door frames (15%), wood cases/boxes/crates/pallets (11%) and others (23%).

**Figure 1. Volume of forest products manufactured in Mexico, 1995-2017**

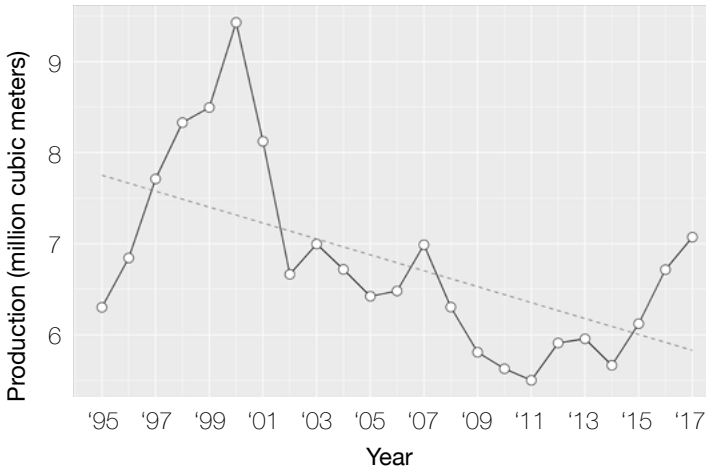
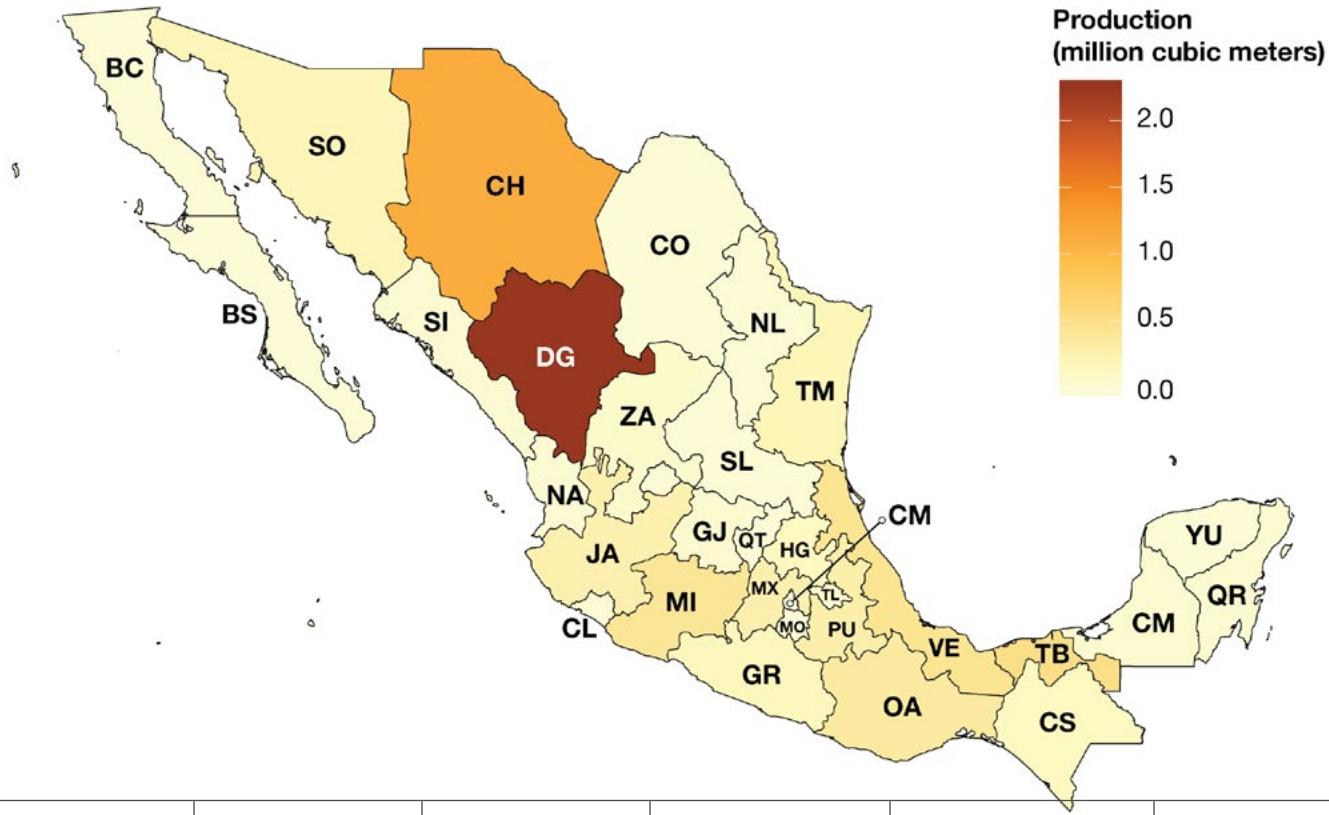



**Figure 2. Production of forest products in Mexico in 2017, by state**




| State | | | State | | | State | | | State | | | State | | | State | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| # | Name | Code | # | Name | Code | # | Name | Code | # | Name | Code | # | Name | Code | # | Name | Code |
| 1 | Aguascalientes | AG | 7 | Mexico City | CM | 13 | Hidalgo | HG | 19 | Nuevo León | NL | 25 | San Luis Potosí | SL | 31 | Yucatán | YU |
| 2 | Baja California | BC | 8 | Coahuila | CO | 14 | Jalisco | JA | 20 | Oaxaca | OA | 26 | Sonora | SO | 32 | Zacatecas | ZA |
| 3 | Baja California Sur | BS | 9 | Chiapas | CS | 15 | Michoacán | MI | 21 | Puebla | PU | 27 | Tabasco | TB | | | |
| 4 | Chihuahua | CH | 10 | Durango | DG | 16 | Morelos | MO | 22 | Quintana Roo | QR | 28 | Tlaxcala | TL | | | |
| 5 | Colima | CL | 11 | Guanajuato | GJ | 17 | Mexico State | MX | 23 | Querétaro | QT | 29 | Tamaulipas | TM | | | |
| 6 | Campeche | CM | 12 | Guerrero | GR | 18 | Nayarit | NA | 24 | Sinaloa | SI | 30 | Veracruz | VE | | | |

**Table 1. U.S. forest products exports to Mexico, by state in 2018**

*Top 10 States per Sector by Value (Millions $USD and percentages)*

| | Wood Chemicals | | | Solid Wood Products | | | Woodpulp | | | Paper and Paperboard | | | Wood Furniture | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Rank | State | Export | | State | Export | | State | Export | | State | Export | | State | Export | |
| | | Millions $USD | % | | Millions $USD | % | | Millions $USD | % | | Millions $USD | % | | Millions $USD | % |
| 1 | TX | 0.76 | 31 | CA | 349.79 | 44 | TX | 174.06 | 19 | TX | 1199.04 | 29 | TX | 34.44 | 32 |
| 2 | PA | < 0.5 | 16 | TX | 181.68 | 23 | AL | 124.05 | 14 | CA | 689.42 | 17 | CA | 18.29 | 17 |
| 3 | NJ | < 0.5 | 16 | PA | 43.22 | 5 | CA | 77.82 | 9 | TN | 431.2 | 10 | MI | 12.9 | 12 |
| 4 | FL | < 0.5 | 13 | AZ | 36.77 | 5 | MS | 69.43 | 8 | GA | 366.33 | 9 | NC | 4.96 | 5 |
| 5 | AL | < 0.5 | 12 | WA | 33.90 | 4 | AR | 59.40 | 7 | AZ | 160.94 | 4 | MS | 4.05 | 4 |
| 6 | OH | < 0.5 | 6 | OR | 19.49 | 2 | FL | 47.97 | 5 | IL | 155.17 | 4 | WI | 3.67 | 3 |
| 7 | SC | < 0.5 | 4 | MS | 11.72 | 1 | MA | 41.08 | 5 | FL | 151.35 | 4 | IL | 3.65 | 3 |
| 8 | NC | < 0.5 | 1 | FL | 10.65 | 1 | NY | 33.98 | 4 | WI | 112 | 3 | OH | 3.18 | 3 |
| 9 | WA | < 0.5 | 1 | MO | 9.15 | 1 | TN | 33.15 | 4 | OH | 97.77 | 2 | UT | 2.95 | 3 |
| 10 | MO | < 0.5 | <1 | GA | 8.29 | 1 | CT | 32.97 | 4 | SC | 69.57 | 2 | FL | 2.48 | 2 |

Southwestern | Inter-mountain | Pacific Southwest | Pacific Northwest | Southern | Eastern

# FOREST PRODUCTS TRADE

## Total imports

Mexico's imports of forest products amounted to $9.1 billion in 2018 [10], an 8.5% increase from 2017 and which follows the trend of positive growth observed over the last decade.

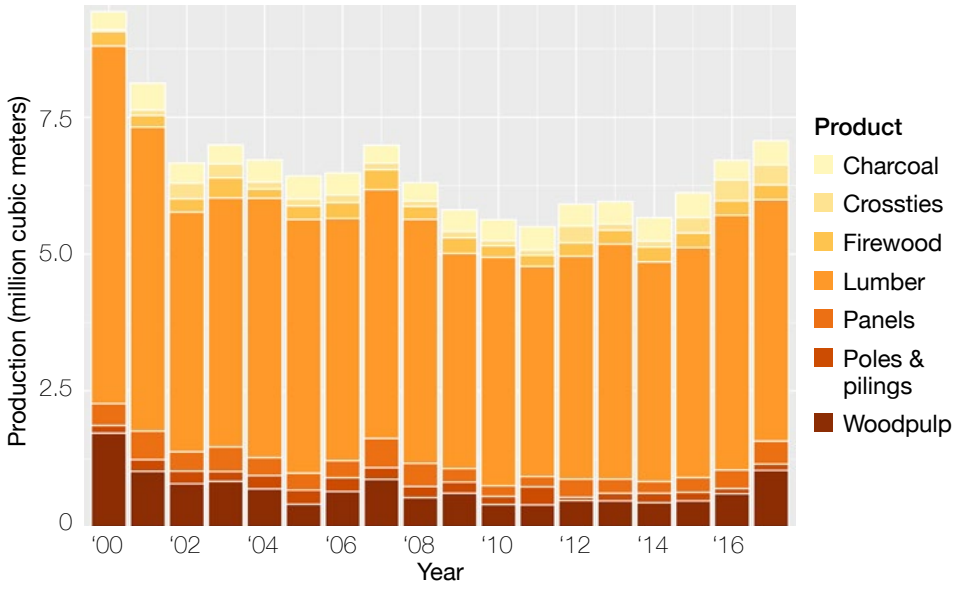
The United States, its top partner and neighbor, accounted for 63% of the total imported that year (approximately $5.7 billion). Next in importance, China, Brazil and Canada's share of imports represented 7.0%, 6.6% and 3.5% of this total, respectively.

By far, most of Mexico's forest products imports have corresponded to Paper and Paperboard products (Figs. 5, 6). In 2018, this sector represented 65% of the country's forest products imports. Second and third in importance, imports of Solid Wood Products and Woodpulp amounted to $1.7 and $1.2 billion that year, which corresponded to almost 19% and 13%, respectively. Wood chemicals and furniture combined accounted for the remaining 4% in 2018.

Imports of paper and paperboard products into Mexico increased by 8.3% from 2017 to $5.9 billion in 2018. Approximately 70% of these came from the United States, 6% from China, 3% from Canada, and the remaining 21% from other countries. The top three paper/ paperboard commodities imported by Mexico are cartons/ boxes (HTS 4819), paper/ paperboard coated with kaolin (HST 4810) and Kraft paper (HTS 4804).

Within the Solid Wood Products sector, three commodities stand out by accounting for almost 67% of Mexico's imports in 2018: lumber, plywood, and flooring and siding. Lumber alone accounted for 35% ($605 million), whereas

**Figure 3. Production of forest products in Mexico, by commodity, 2000-2017**



plywood and flooring & siding for 21% ($366.8 million) and 11% ($180.6 million), respectively.

Most of the Solid Wood Products imported by Mexico come from the United States (42% in 2018), Brazil (15.5%) and China (12%). Mexico imported $1.2 billion of woodpulp in 2018. Approximately 57% corresponded to soda/sulfate woodpulp and 36% to waste and scrap paper and paperboard. Most of the imports within this sector came from the U.S. (70%) and Brazil (20%).

## Imports from the United States

Forest products imports from the U.S. have increased steadily over the last decade at a pace of +$120 million a year, with a strong focus on paper/paperboard products [11]. This sector alone accounted for almost 70% of all forest products imported from the U.S. in 2018 (Fig. 7).

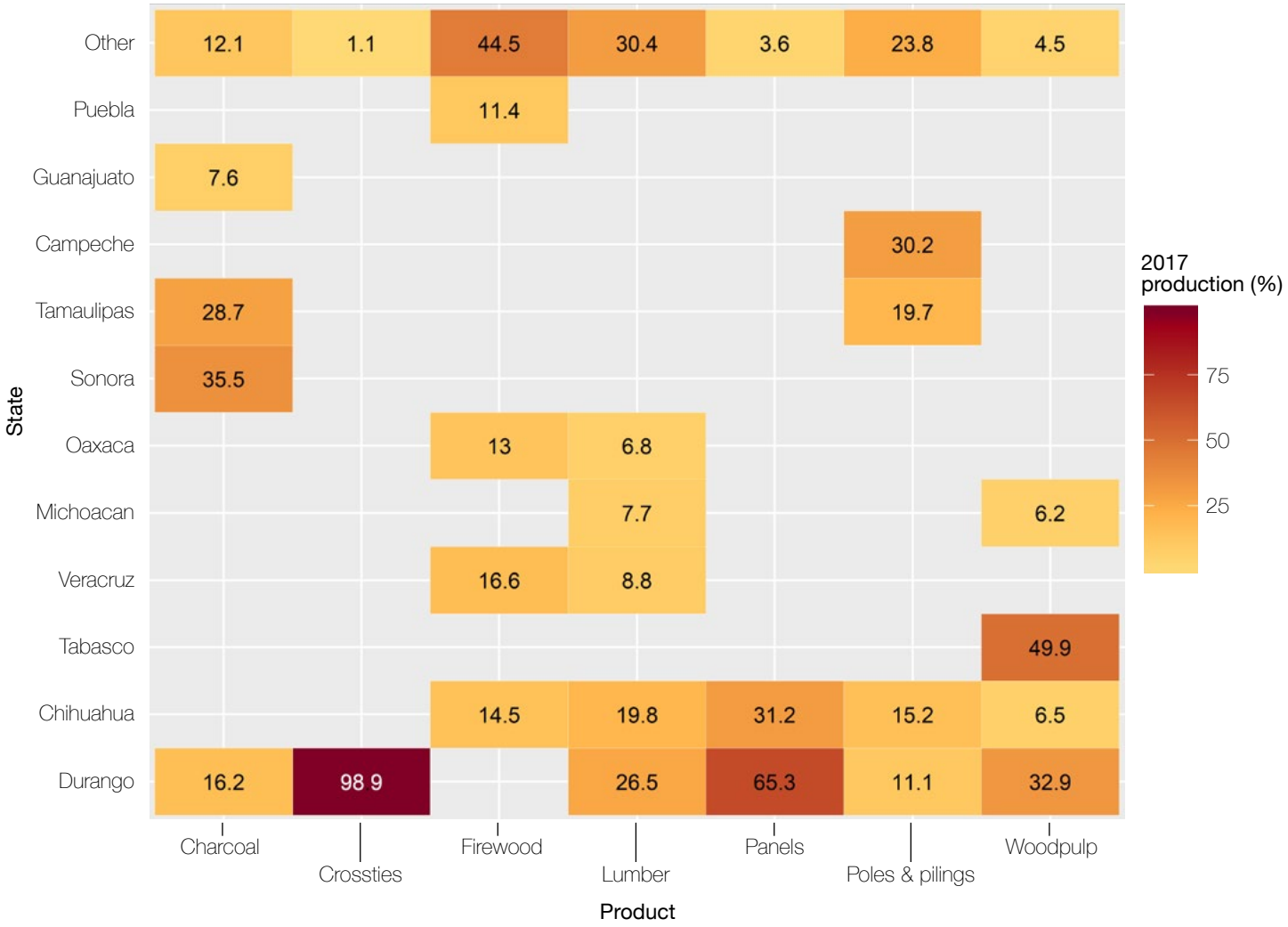
Solid wood products and woodpulp followed in importance representing 15% and 13% of exports that year. Most of the imports from the U.S. are transported by truck (96 % of the value in 2018), whereas vessel shipments accounted for less than 4% (mainly from Alabama, Florida and California).

Almost 50% of all U.S. forest products exports into Mexico in 2018 originated from the states of Texas (27%) and California (19%). Tennessee, Georgia and Arizona also joined the top five by accounting for 8%, 7% and 4% that year, respectively. Figure 7 provides the distribution of U.S. exports in 2018 by region, and in greater detail, Table 1 shows exports from the top 10 states into Mexico by sector also in 2018.

## Solid wood products

In 2018, the solid wood products sector accounted for 19% ($1.7 billion) of Mexico's forest product imports. As indicated earlier, the top three commodities in this sector are lumber, plywood, and flooring and siding. As a side note, import of logs represented less than 1% of the sector's total in 2018.

**Figure 4. Distribution of volume of forest products manufactured in Mexico in 2017, by commodity and state**



Total lumber imports have shown a positive growth between 2014 and 2018, amounting to a 17% increase for the period. The distribution of imports in 2018 by species group corresponded to 72% of softwoods, 19% of hardwoods (mostly beech) and 9% of other groups.

Mexico's major trade partners in this sector are the U.S., Brazil, Chile and Canada, representing 48%, 23%, 12% and 6% of imports in 2018, respectively.

Almost 91% of Mexico's import supply of softwoods came from the U.S., Brazil and Chile. Hardwoods were mainly sourced from the U.S., Peru and Brazil. Most of plywood imports usually correspond to boards with both outer plies made of coniferous wood, boards with at least one outer ply made of coniferous wood, and those with at least one ply of tropical wood (57%, 18% and 15% in 2018, respectively.).

The top players in the Mexican plywood market are China, Brazil, Chile, Uruguay and the U.S., which together accounted for 83% of the total value of imports in 2018.

Flooring, siding and molding products imports into Mexico came mainly from the U.S., Vietnam and Chile: 79%, 4.5% and 4.2% in 2018, respectively. About 90% of the value of imports for this sector corresponded to hardwood species, 9% to softwoods, and less than 1% to tropical species.

Almost half of the lumber imported by Mexico entered the country by ground transportation. Together, truck and rail accounted for 55%

**Figure 5. Mexico's forest products imports, by sector, 2009-2018**

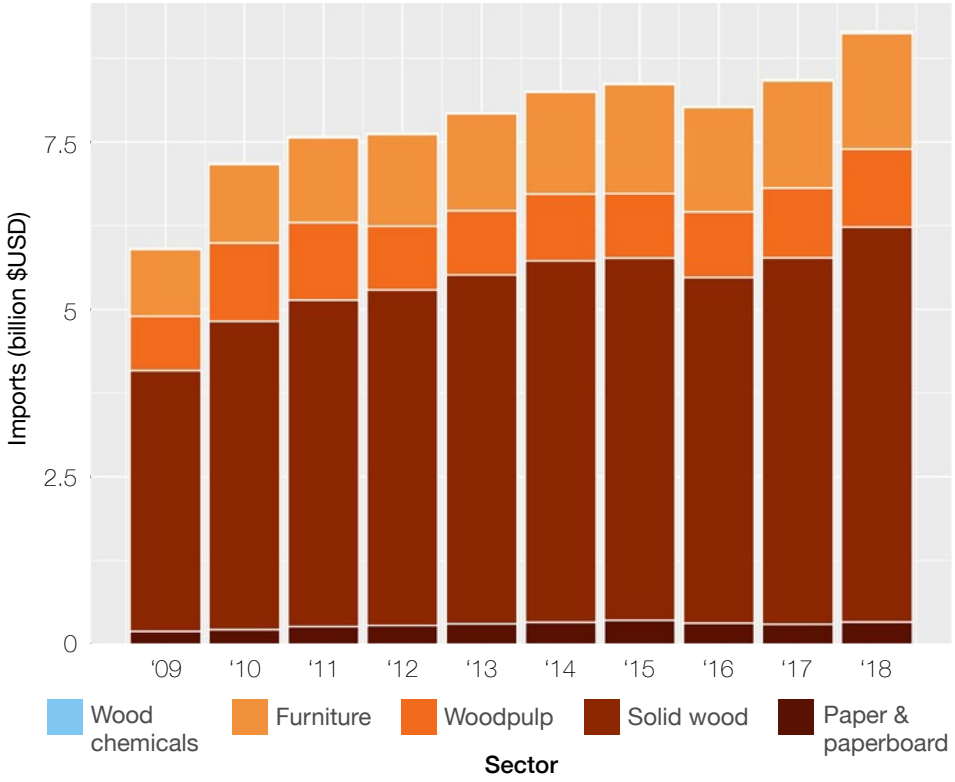
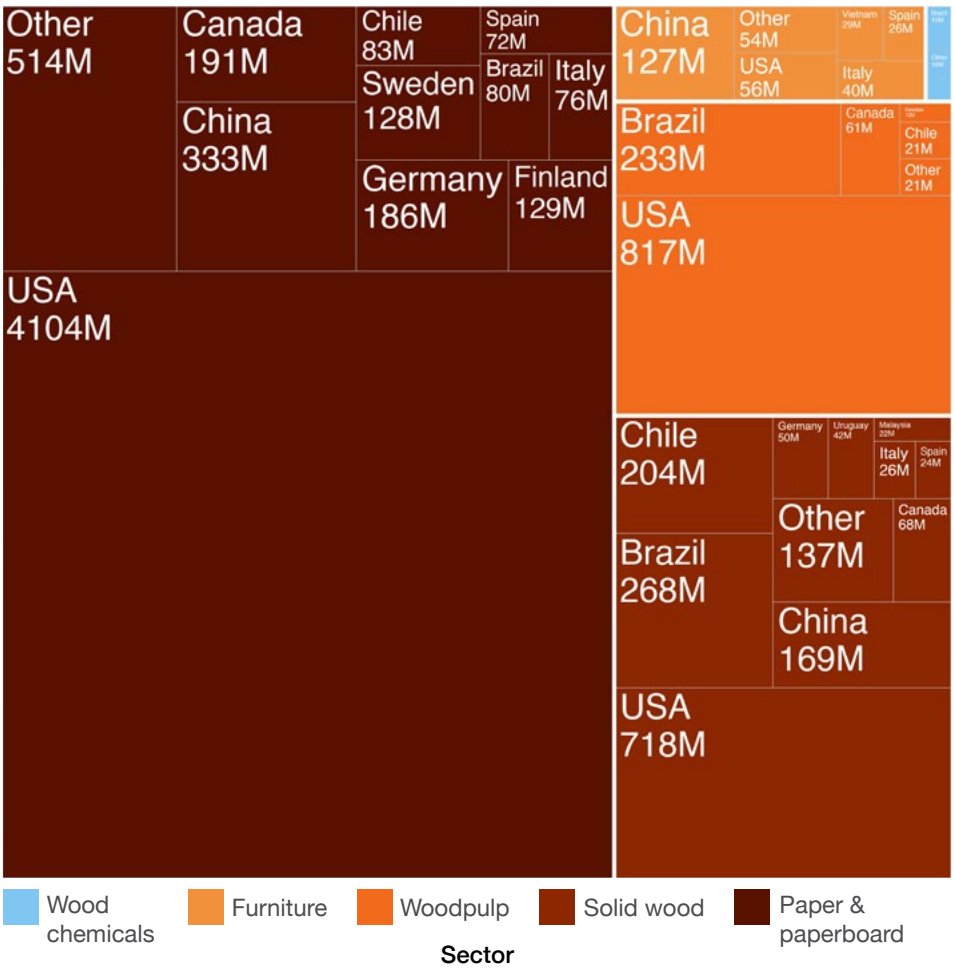


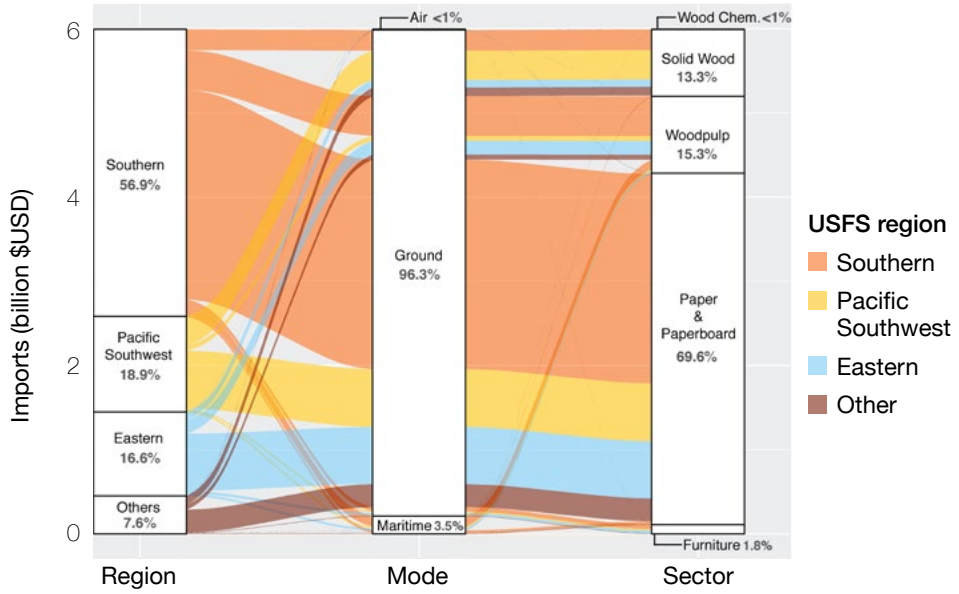

**Figure 6. Mexico's forest products imports, by sector and partner in 2018**



of the value of lumber imports in 2018 (41.1% and 10.9%, respectively). In a close second place, maritime imports represented 45% of the total in 2018 as well and originated mainly in Brazil, Chile and Germany. The U.S. accounted for 91.5% of the value of imports by truck, and 65.4% of those by rail. Canada accounted for the remaining 5% and 34.6%, respectively.

The first destination of approximately 90% of the lumber imported by Mexico corresponded to five main port cities: Baja California Norte, Tamaulipas, Veracruz, Chihuahua and Colima. Figure 8 shows the location of the mayor ports for lumber imports.

**Figure 7. 2018 U.S. forest products exports to Mexico, by USFS region, mode of transportation and sector**




| Region | States |
|---|---|
| Eastern | CT, DE, IA, IL, IN, MA, MD, ME, MI, MN, MO, NH, NJ, NY, OH, PA, RI, VT, WI, WV |
| Pacific Southwest | CA, HI |
| Southern | AL, AR, DC, FL, GA, KY, LA, MS, NC, OK, PR, SC, TN, TX, VA |

## Paper & Paperboard

Total paper & paperboard products (P&P) imports into Mexico amounted to $6 billion in 2018, which, as mentioned earlier, corresponded to almost 65% of the total forest products imported by this country.

The top four commodities seek by this sector were cartons, boxes, cases, and other packing containers (19%), P&P coated with kaolin (16%), uncoated Kraft P&P (14%) and other P&P products (51%). The U.S. was Mexico's top supplier of P&P products in 2018, accounting for 69% of the country's imports.

China and Canada's share amounted to 6% and 4%, respectively, while other countries supplied the remaining 21%. Approximately 70% of those imports coming from the U.S corresponded to four states: Texas (29%), California (17%), Tennessee (10%), and Georgia (9%).

The Mexican paper & paperboard market is one of the few that experienced significant expansion over the past five years, thanks to its growing manufacturing, and online retail sectors driving higher demand for packaging materials [12].

A slow pace in Mexico's digitization has also helped its newsprint segment maintain its popularity and growth [12]. The top Mexican manufacturers of paper and paperboard products are: Bio Pappel, S.A.B. de C.V.; Copamex, S.A. de C.V.; and Gondi, S.A. de C.V.

# INDUSTRY OUTLOOK

The North American Free Trade Agreement (NAFTA), ratified in 1993 by the U.S., Canada and Mexico, had among its goals the gradual elimination of barriers for imports for forest products.

By 1992, Mexico was already the third most important buyer of forest products from the U.S., despite having the highest tariffs in the region: 15% of the value of imports of lumber, panels, paper and paperboard.

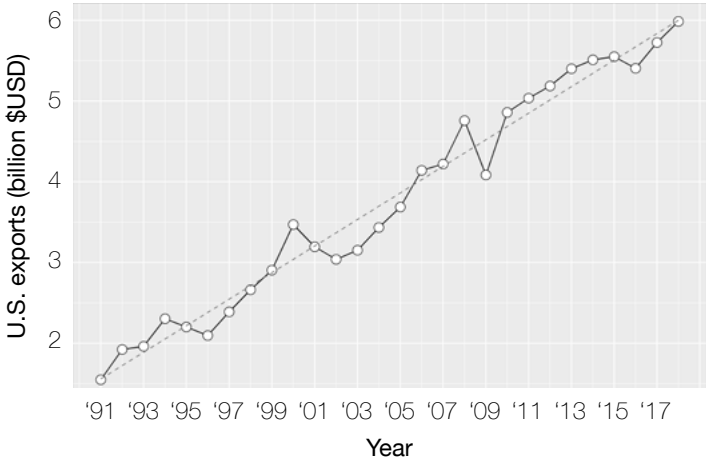
The passage of NAFTA resulted in the elimination of these tariffs over the first 10 years of its implementation. Early studies forecasted significant increases in exports of forest products from the U.S. into Mexico, particularly for solid wood products and paper products, ranging from 21% to 83% in total for the sectors combined [13].

Historical data from the U.S. Census Bureau indicate that total U.S. forest products exports to its southern neighbor grew 106% between 1991 and 2001; and 97% from 2002 through 2018 (Fig. 9). Now that the region is preparing to ratify the U.S.-Mexico-Canada Agreement (USMCA), an update to NAFTA, new research suggests that the industry would benefit from enhanced rules on import checks, audits, equivalence and regionalization [14].

**Figure 8. Top Mexican port cities for lumber products**

Multiple forest products associations in the U.S. openly support the new trade deal, claiming it will maintain open access for the industry's exports to Mexico. The construction industry in Mexico is one of the sectors with the greatest growth prospects given internal policies to enhance the development of the sector, which is why timber for construction (specifically pine, for boards, beams, profiles or moldings) is a product with high demand.

**Figure 9. 1991-2018 U.S. forest products exports to Mexico**



The Palacio Nacional is the focal architectural point of the Plaza de la Constitucion in Mexico City,

# LIST OF RELEVANT TRADE SHOWS

## Construction

- EXPO CIHAC. Mexico City, Mexico. October. Building materials, machinery, equipment, hand and power tools, building systems and prefabricated technologies, financial services, real estate, finished houses, insulates, piping, etc.

## Furniture

- Magna Expo Mueblera Industrial. Mexico City, Mexico. January. Focused on technology, machinery and material supply for the forestry, woodworking and furniture manufacturing industries
- Expo Mueble International. Guadalajara, Mexico. August. Furniture Manufacturers
- Tecno Mueble International. Guadalajara, Mexico. August. Woodworking Machinery & Furniture Suppliers Show
- Expo Forestal. Guadalajara, Mexico. October. Biodiversity, Technology and Productivity.

# LIST OF LUMBER IMPORTERS[4]

- Arauco Mexico S.A. de C.V.
- Pallets La Esperanza S.A. de C.V.
- Pinelli Universal S. De R.L. De C.V
- Global Products Co. S.A. de C.V.
- Pallets Empaques y Embalajes S.A de C.V.
- Productora De Tarimas Del Sur S.A. de C.V
- Global Forest S.A. de C.V.
- RSI Home Products S. de R.L. de C.V.
- Truper S.A. de C.V.
- Woodcrafters Home Products S. de. R.L. de C.V.
- Losifra S.A. de C.V.
- Industrias Sicomoro Del Norte S. de R.L. de C.V.
- Baja Wood Internacional S.A. de C.V.

# LIST OF KEY RESOURCES FOR EXPORTERS

- IMEXFOR: Mexico's Forest Products Importers and Exporters Association.
  Office: Mexico City
  Web: www.imexfor.com
  Email: imexfor.direccion@gmail.com
  Phones:+52 55 5255-3283, +52 55 2624-3193

- USDA Foreign Agricultural Service Mexico
  Offices: Mexico City, Monterrey.
  Web: mexico-usda.com.mx
  Contact Information by Department: https://mexico-usda.com.mx/contact-us/

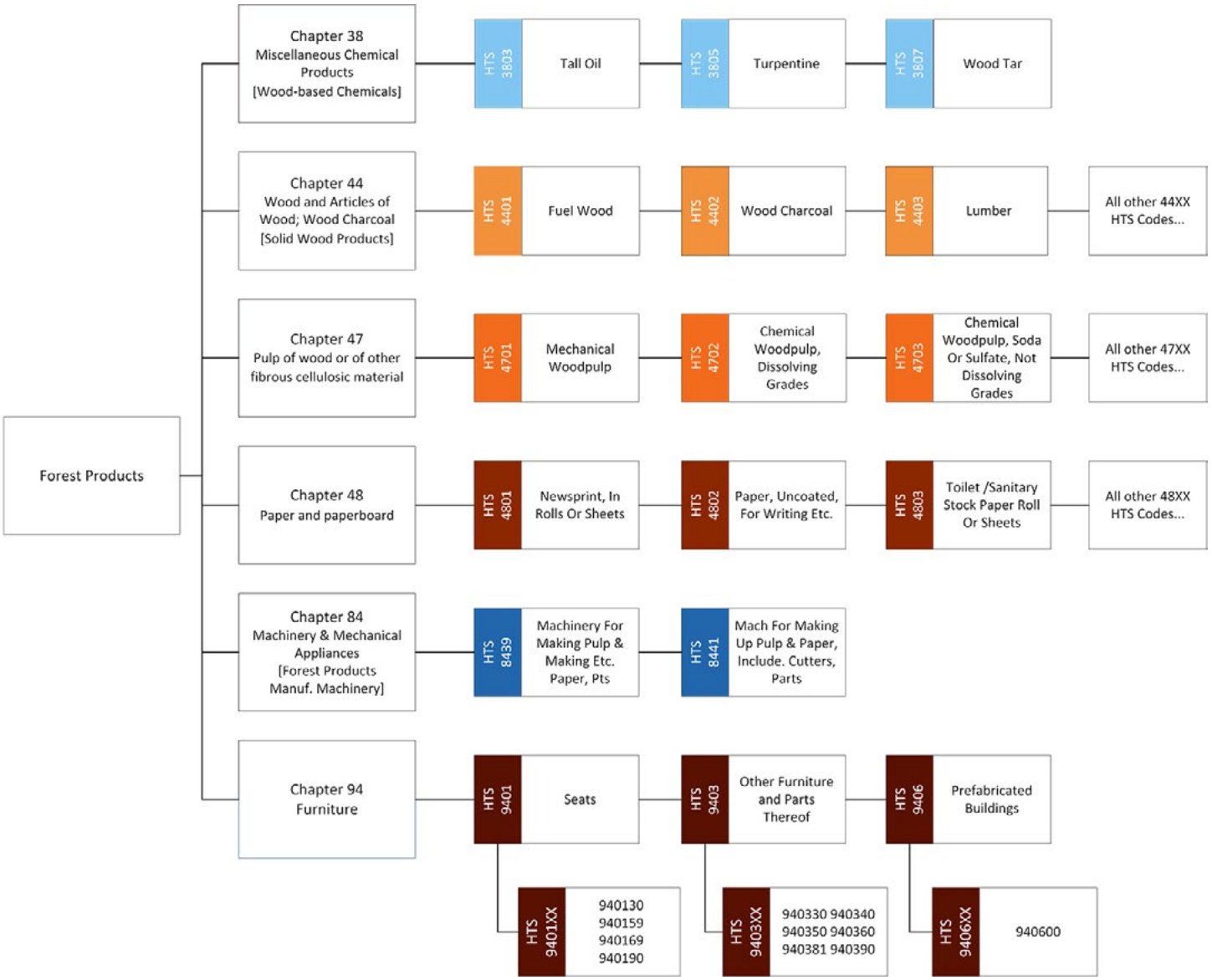
- American Hardwood Export Council
  Offices: Virginia, Mexico City
  Web: www.ahec.org
  Contact Information by Location: https://www.ahec.org/about-ahec

- Softwood Export Council
  Offices: Portland, Mexico
  Web: www.softwood.org
  Contact Information by Location: http://www.softwood.org/about-sec.html

- Southern Forest Products Association
  Offices: Metairie, LA; Mexico City.
  Web: sfpa.org
  Contact Information: https://sfpa.org/contact/

# NOTES

1 Brazil is the country with the largest GDP in Latin America.
2 A piece of land farmed communally under a system supported by the state.
3 Including exports.
4 List based on the value of lumber imports in 2018.
5 Forest products: commodities and groups



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South Carolina Forestry Commission

# PROJECT INFORMATION

## PROGRAM: LANDSCAPE SCALE RESTORATION

### Funding Agencies

The US Department of Agriculture and US Forest Service

### Funding Year

2016

### Title

Mapping Path to Growth for U.S. Southeastern Forest Products

### Forest Service Region

USDA Forest Service - Region 8

### Description

The existence of adequate markets, local and international, to sell forest products is a key barrier to private non-industrial forest landowners exercising sound forest management on their land. Without adequate markets and a favorable return on their timber investment, landowners will not reinvest in establishing quality, well-stocked stands for future timber resources. Markets created through forest products industrial development and export development create jobs and reduce the trade deficit. The goal of this project is to develop current and new international markets for the Southern US forest resources by delivering a series of reports profiling the top international markets for forest products. Information presented in this marketing report is based on original research (interviews and site visits), as well as on secondary sources.

### Goals

1. Assist the southeastern region of the U.S. in identifying opportunities to increase exports of forest products in current and new markets, which in turn will help the industry grow and create new jobs. Through this project, companies, government agencies and trade associations will have access to valuable marketing intelligence, relevant in developing new businesses, customers, products and services.
2. Raise the industry's awareness of key aspects involved in international trade: such as logis tics, financing, environmental certifications, as well as providing insights on wellestablished and emerging markets.

## SC MARKETING

This study was conducted by the Resource Development Division at the South Carolina Forestry Commision, in partnership with particpating agencies at the Southern Group of State Foresters: Florida Forest Service, VA Department of Forestry, GA Forestry Commission, KY Division of Forestry, NC Forest Service, TN Dept of Ag. - Div. of Forestry.

A cascade falls over a rocky slope in the jungles of the peninsular state of Yucatán.

South Carolina
Forestry Commission

FOREST PRODUCTS
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