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GLOBAL MARKET OPPORTUNITIES REPORT

THE ENVIRONMENTAL MARKET IN ARGENTINA

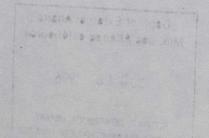
Prepared by: SERGE PAPACOTSIA

Commercial Division of the Canadian Embassy in Buenos Aires, Argentina

JUNE 1995

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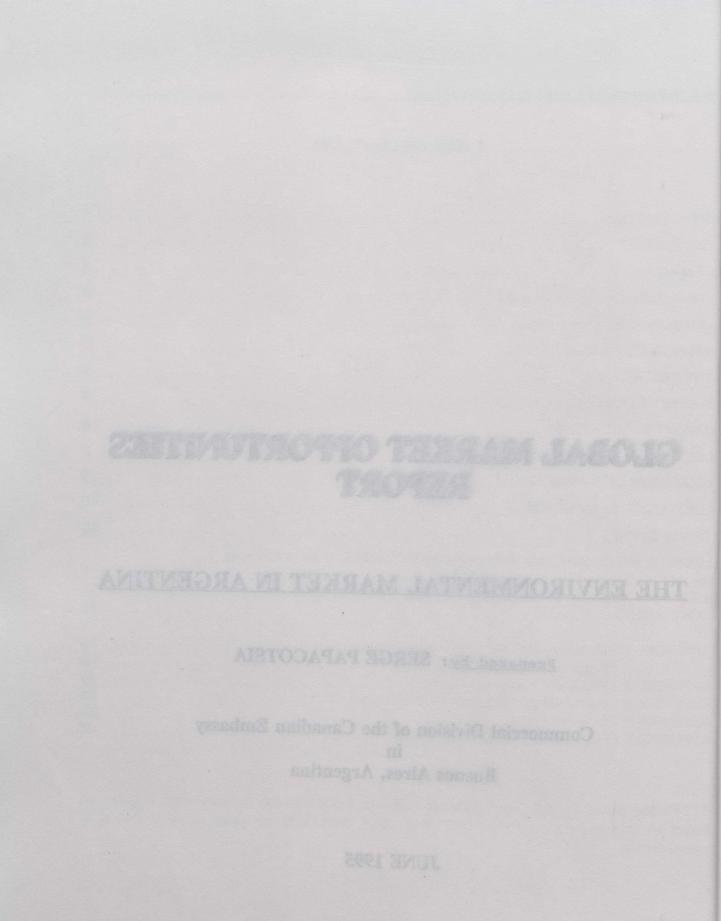
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Commercial Division of the Canadian Embassy in Buenos Aires, Argentina

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INTRODUCTION

There is no more doubt about who will lead the country for the next four years, until 1999. On Sunday May 14 1995, Dr. Carlos Saúl Menem was elected for a second consecutive term as Argentina's President. Therefore, one can at least expect a continuity in economic policy and the assurance of an *open-market economy* that welcomes trade and foreign investments.

In the recent years, privatization and the reduction in trade barriers have created many investment and export opportunities for foreign companies and governments. Today, some of the big players in the Argentine market are the United States of America, Germany, Brazil, Italy, and France. In 1993, Canadian products accounted for about 0.5% of Argentine imports. With the recent launching of the Mercosur customs union (Argentina, Brazil, Paraguay, and Uruguay), companies in Argentina can now tap into a market of almost 200 million people.

In Argentina, the "Protection of the Environment" issue has only been of concern since 1991. The Environmental market is therefore at a very early stage of its existence.

In contemplating business opportunities in the country, it is important to understand the applicable legal framework. Provincial governments have substantial authority and power, and develop their own legal instruments. The provinces claim the right to manage their own environmental affairs and they usually draw their own laws in matters such as water, air, waste, pesticides, etc. Federal laws are to provide the basis of legislation to be complemented at the provincial level depending on cultural and ecological needs. Therefore, law enforcing regulatory agencies may exert control differently in each of the 23 Argentine provinces.

A new federal law will come into effect, by the end of 1995, establishing the minimum legal framework for **all** types of wastes (a step further than the hazardous wastes law of January 1992). It is expected that provinces will approve it and set up tight regulatory measures to enforce it. Judges have begun to fine offenders.

Some companies have already sought advice from consultants, both local and foreign to look for solutions to their contamination problems before legislation catches up with them.

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THE MARKET

A strong demand for products and services is expected in the near future due to the increasing social and legal pressures on industries, health establishments, and governmental organizations to alter their operations that have been proven to cause environmental damage. There seems to be a growing concern about public health and environmental depredation.

The potential for increasing demand is omnipresent. However, only big companies and multinationals have the funds necessary to finance a technology transfer, or the purchase of equipment for the treatment of wastes. Small and medium-sized enterprises (SMEs) do not usually have "deep pockets" and will need financing. At the moment, there is no government support, in terms of incentives or promotions, and SMEs find that local banks end up charging unfeasible interest rates on loans. This issue will soon be addressed by the Secretariat of Natural Resources and Human Environment (SRNAH). Also, the Organization of American States (OAS) has shown interest in solving this problem. Funding by multilateral institutions (World Bank, IDB, IMF) should be expected to continue. Furthermore, the Association for the Development of Environmental Management (ADEGA) is setting up a program to help SMEs find financing for technology transfers (re: following section).

As far as regional projects are concerned, the IDB plans to fund (through loans) the following:

- The program for the Environmental Management of the Matanza-Riachuelo Basin. In its preparation stage, the program will require works including construction of retaining walls, canals, dams, and pumping stations. Micro-drainage works will also be included and dredging of the Riachuelo may be undertaken. Consultants will be hired for institutional strengthening and development of complimentary environmental programs. The executing agency is the Subsecretaría de Obras Públicas, Ministerio de Economía de la Nación. Interested companies should contact the agency (re: Appendix 3).

- The Lago San Roque Basin Ecological Recovery Program. In its identification stage, the program will require works including collection, treatment, and waste disposal in nine cities of the basin. Consultants will be hired to carry out a feasibility study and for institutional strengthening. Waste management works will also be required. The executing agency is to be determined. Interested companies should contact the IDB to keep track of the program (re: Appendix 3).

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Segments:

The Environmental sector is very broad. At its simplest, it could be divided into four segments, which are not totally independent:

- Treatment of wastes (solid, liquid, and gaseous);
- Upgrading of the Infrastructure (water & air systems,
- purification and pollution control equipment);
- Technology transfer (upgrading of industrial process);
- Medium-to-long term investment for sustainable development in the field of agriculture and forestry.

Immediate to short-term need:

Consultants say that the *immediate growth prospects* lie in the treatment of wastes (mainly liquid, but also gaseous). The urgent need for treatment comes from the fact that the quality of water resources has been affected in several basins of the country. This is due to the discharge of sewage and rain wastes and un-processed industrial effluents, the recycling of drainage water with high salinity for irrigation, the leaching of pesticides from the soil, fuel spills and other sources. Sectors that have shown considerable growth and that are also highly polluting are: paper and paper paste; chemicals; plastics; petrochemicals; aluminum, iron, and steel; and food preparation (re: Appendix 1, for list of companies within the aforementioned sectors). Other effluent generating industrial installations to consider are: paint; pharmaceuticals; tanneries; and slaughterhouses. Industrial installations in these sectors would need technology transfer, waste management services, and equipment for waste treatment.

Even though meaningful statistics about the environmental market (exact size, growth, segments, market shares,...) are not available, it is certain that great potential lies for businesses involved in the safequard of the environment.

For example, industrial plants in the province of Buenos Aires (approx. 30,000), including the capital, account for about 60% of the national industrial production. It can be said that usually, around 90% of all industries have operations that affect, in one way or another, the environment. From interviews with consultants, it was approximated that around 20% of the industries in the B.A. province use adequate waste treatment. This means that about 80% of 27,000 industries (over 21,000) will be in need, in the future, of products and services to allow for treatment of their wastes or transformation of their operating process. Furthermore, the average industrial plant in the greater Buenos Aires area apparently needs to invest USD 300,000 in installations

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(consultancy, services, and equipment) to treat liquid waste in order to comply with legislation. If only one tenth of the violators in the region react and "clean up their act", a potential market of more than USD 600 million will open in which Canadian suppliers of services and equipment could compete.

As far as equipment is concerned, consultants say local suppliers will not be able to meet the demand, and apparently, imports should account for approximately 60% of this market segment, in the years to come. In consultancy, local firms usually charge less than the international fees and have an immediate availability advantage. However, many of them are in search of *cooperation agreements* with specialized environmental firms from developed countries.

According to the Industrial Union of Argentina (UIA), the main industrial provinces are , in order of importance: Buenos Aires (along with the Capital), Córdoba, and Santa Fe.

Medium to long-term need:

Investments are also needed in **basic sanitation**, to improve the supply of potable water, sewage systems, and processing of liquid wastes. Privatizations of such services have been and are being conducted through public international calls for bids. Such privatizations, as in the case of the provincial department of sanitation of Tucumán, can take the form of a concession, not to exceed 30 years. A surge in demand is expected in this field. According to the director of pollution control at the Secretariat of Natural Resources and Human Environment (SRNAH), the provinces of Jujuy and Salta are about to privatize their sanitation services. Health authorities (sanitation departments) in the different provinces should be contacted (re: Appendix 2).

Demand for the *processing of pathological wastes* is also important. To comply with legislation, public and private hospitals, as well as pathological and veterinarian clinics must deliver their wastes to processing plants.

Water erosion (in the provinces of Buenos Aires and in the littoral) and wind erosion (in the western Argentine provinces and Patagonia) have damaged the landscape in Argentina and therefore, are of concern to those within the *agricultural sector*. The country's rainfall system allows for approximately 25% of its continental territory to be regarded as humid, while the remaining 75% suffers, in one way or the other, from the lack of water, as far as agricultural production is concerned. In the lowest arid regions, agriculture cannot be practiced without an irrigation system. Due to irregular weather patterns throughout the country, droughts and flooding are not uncommon.

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Agricultural producers may need tools or techniques allowing them to apply erosion control or alternative working methodologies when natural conditions demand so. Producers may also need to diversify their farming, cattle-raising, dairy-farming, and other techniques through the application of intensive technologies including irrigation systems and the application of agrochemical products and nutrients. Ministries of Agriculture or of the Environment should be contacted. At the moment, the main environmental agency is the **Secretariat of Natural Resources and Human Environment**. For a list of relevant associations and government entities, refer to Appendix 3.

According to US Best Markets Report (BMR) for pollution control equipment, Argentina's total market was USD 12.0 million in 1993 with an expected average annual growth (%AAG) of 16%, from 1993 to 1995. The size of the import market was estimated to be USD 3.0 million in 1993 with an expected %AAG of 20%, from 1993 to 1995. But as previously mentioned, due to new legislation and probable financing to SMEs, demand should grow even more.

HELPING OUT SMEs!

In 1992, 108,458 companies were classified as SMEs in Argentina. They employed an average of 9 staff members each. At the time, SMEs contributed 42% of the country's industrial production. Now, they only account for 30% of the industrial production. This is due to the open-market policies and the difficulty that SMEs find in surviving without the protection of high tariff barriers. Their production methods are far from sophisticated and they do not have the financial resources to ensure adequate treatment of their wastes or much needed technology transfers.

The Association for the Development of Environmental Management (ADEGA) is setting up a project called the Argentine Center for Clean Production (CEPLA). The goal of the center is to become the facilitator, for the transfer of know how, between local Argentine SMEs which need to learn how to operate in an environmentally safe manner, and foreign SMEs that have gained the expertise and already possess the technology.

In a study carried out by ADEGA, in which executives from 212 industrial companies were interviewed, 67% of the firms said they were planning to invest in environmental projects, of which 30.3% of the funds would go to the transfer of foreign technologies. Many SMEs have joined forces to form the *Cámara Argentina de la Pequeña y Mediana Empresa* (re: Appendix 3). United, their search for technology becomes more effective and more promising. Agricultural producers may need tools or techniques allowing them to apply erosion control or alternative working methodologies when natural conditions demand so. Producers may also need to diversify their farming, cattle-raising, dairy-larming, and other techniques inrough the application of incemsive coshnologies including trigation systems and the application of agrochamical products and nutrients. Ministries of Agriculture or of the Environment should be contacted. At the moment, the main environmental agency is the Secretariat of Matural Resources and Buman Environment. For a list of relevant associations and government entities, refer to Appendix s.

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Companies that have similar operating processes can share the benefits and costs needed to invest in adequate technologies. ADEGA wishes to help local SMEs in their search by establishing contacts with foreign SMEs (industrial or agricultural) interested in sharing their know how.

The CEPLA project will be carried out in three steps. Firstly, two years will be needed for the organization and beginning of operations. Pilot projects will be taken on, in technology transfers, for specific sectors. Secondly, two years of full-time operations will take place with an emphasis on five specific industrial sectors. Thirdly, five other sectors will be considered for the fifth and sixth years.

Some dominant sectors are: agriculture; agro-industry; chemical industry; construction and transportation; electronics, informatics, and telecommunications; energy; environmental technology; food industry; logistics; machinery; medical and pharmaceutical technology; metallurgical industry; paper, wood, and textiles; and plastics and rubber.

ADEGA is a member of INTET, the International Network for Environmentally-Friendly Technology. It also has agreed to a convention of mutual collaboration with APCTT, the Center for Technology Transfer in Asia and the Pacific. ADEGA also plans to establish links with the World Environmental Center (WEC) from the USA, with ENVIROACCESS and L'INSTITUT DES SCIENCES DE L'ENVIRONMENT, both from Canada, and with INSTITUTO CERDA from Spain.

CEPLA is presently gathering the needed funds for its operations. Costs will be gradually covered by a tariff charge of 1% on technology transfer agreements it helps to create. An estimated six years will be needed for CEPLA to operate autonomously.

CEPLA will also organize various seminars to allow informal meetings between government authorities and members of determined industrial sectors, in order to exchange ideas in reference to environmental issues. The first seminar will probably be scheduled for the third quarter of 1996.

For more information on the program, interested parties should contact ADEGA (re: Appendix 3).

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THE COMPETITION

Where does Canada stand?

The response from consultants and the Industrial Union of Argentina when asked: "How is Canada perceived as a potential supplier of products and services in the environmental sector?", was that there is little known about Canadian export capability and expertise in this emerging industry.

The most important foreign suppliers of "know how" are thought to be the United States of America and Germany (many deals have already taken place). Then, France, Canada, Japan, Spain, Britain, and Italy come into the picture, at a much lower scale. Argentine businesspeople feel that Canadian companies have not been strong in promoting their export capabilities. However, recent trade missions (Quebec Environmental mission, March 28 to 31, 1995) have helped in promoting Canada's expertise in the environment and its professional image. But such missions, along with seminars and visits, should take place on a regular basis in order for the local industries to realize the full potential of Canadian exports. It's a matter of business relations that have to be sustained and strengthened.

As far as the environmental sector is concerned, about ten agreements (in the form of joint-ventures, associations, or representations), between Argentine and Canadian firms, are known to the commercial division of the Canadian Embassy in Buenos Aires.

MARKET ACCESS

How to "get in" the environmental market in Argentina?

Joint ventures are strategic alliances that allow companies to invest in existing operations and therefore enter the market with the advantage of having a knowledgeable local partner. The most recent agreement of this type (early 1995) was established between Pamar S.A. and Jacques Whitford Environment Limited. The newlyformed company, Pamar-Jacques Whitford S.A. will ensure the development of environmental engineering in Argentina. Some of the services offered will be: impact assessment, waste management, and water treatment.

Market access can also be **through the consultants** (re: Appendix 4) who design the plants and recommend the equipment to be purchased. Strong local distributors (*local agents, representatives*) can be of great help in convincing consultants and their clients to

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specify Canadian equipment (re: Appendix 5). Argentine distributors that also manufacture their own products might be interested in technology transfers in order to become more competitive on international markets. Moreover, transfer of technological knowhow can be arranged directly with effluent generating industrial firms that might wish to alter their environmentally-harmful operating process. Most of the agreements in the environmental market, between Argentine and Canadian firms, have been of the "representative agent" type.

IMPORT REGULATIONS

Foreign investment is very much welcomed in Argentina. Open market policies adopted by the Argentine government continue to benefit foreign companies. The environmental sector comprises many different products. Here is a general overview of the import duties on various product categories:

Product Category	import tariff	statistical tax	V.A.T. (value added tax)
Filters*	16 - 24 %	3 %	21 %
Pumps*	24 %	3 %	21 %
Absorbents (chemicals)*	< 10 %	3 %	21 %
Cleaners, burners*	24 %	3 %	21 %
Pipes, valves, and fittings.*	14 - 24 %	3 %	21 %
Protection & monitoring equipment	0 %	3 %	21 %
Pollution control systems	0 %	3 %	21 %

* For products considered as intermediate goods (parts and accesories). Capital goods have 0% import duty rate. <u>Source</u>: Nomenclatura común del Mercosur, March 1995 (Nomenclatura del Comercio Exterior)

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specify Canadian equipment (re: Appendix 5). Argentine distributors that also manufacture their own products might be interested in technology transfers in order to become more competitive on international markets. Moreover, transfer of technological knowhow can be arranged directly with effluent generating industrial firms that might wish to alter their environmentally-harmful operating process. Most of the agreements in the environmental market, between Argentine and Canadian firms, have been of the "representative agent" type.

POPLARDORT THOP

Foreign investment is very much welcomed in Argentins. Open merket colicies adopted by the Argentine government continue to benefit foreign companies. The environmental sector comprises many different products. Here is a general overview of the import duties on various product categories:

* For products considered as intermatiate goods (parts and addesonater). Capital goods have 0% isport duty rate. <u>Source</u>: Nomenclatura comin del Hercoeur, March 1995 (Nomenclature del Comenclo

For more tariff information on specific types of products, companies should consult the Commercial Division of the Canadian Embassy in Buenos Aires. Argentina's tariff system is ruled by the International Brussels Nomenclature.

As a member of Mercosur, Argentina will have to raise its tariffs on capital goods, in stages, from 0% to 14% by the year 2001. One should also consider that, at the moment, approximately 90% of products from other Mercosur countries (Brazil, Paraguay, and Uruguay) now enter Argentine markets duty free.

LOCAL CERTIFICATION REQUIREMENTS

The counterpart to the Canadian Standards Association is the Instituto de Racionalización Argentino de Materiales (IRAM). IRAM usually follows ISO and IEC international standards guidelines. As far as the environmental sector is concerned, North American standards are accepted.

For further information, contact:

Instituto Argentino de Racionalización de Materiales (I.R.A.M.) Chile 1192 (1098) Buenos Aires, Argentina Tel: (54-1) 381-4424 Fax: (54-1) 383-4103

LANGUAGE OF BUSINESS

English is widely spoken in government and business circles, however, Spanish should be used for promotional material. The following agencies/ individuals may be contacted for translating/ interpreting services:

peacing a electric current requires 220 V, 50 cycles.

JAMES, RUTH Mrs. Ruth James Catamarca 2920 Olivos, Buenos Aires (1636) Argentina Tel: 783-1475 (Msg)

RUT SIMCOVICH Ms. Rut Simcovich Traductora Juncal 695 Buenos Aires (1062) Argentina

products and services. Most environmental trade

he Rovironmental Market in Argenting.

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instituto Argentino de Racionalización de Materiales (l.R.A.M.) Chile 1192 (1098) Buence Aires, Argentina Tel: (54-1) 381-4424

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> JAMES, ROTH Hre. Ruth James Catamarca 2920 Olivos, Buenos Aires (1536) Argentina Tel: 783-1475 (Mag)

> > ROT SINCOVICH Ms. Rut Simcovich Traductora Ouncal 695 Buenos Aires (1952) Argentina

Tel/Fax: 313-6843/ 7581/ 3299

V.E. TRADUCCIONES

Ms. Elsa D'Onofrio Traductora J. Alvarez 647, Piso 4, "13" Buenos Aires (1414) Argentina Tel: 962-0232 Fax: 865-1620

SILVIA TAUSSIK

Sra Silvia Taussik Traductora Urquiza 822 Vicente López, Buenos Aires (1638) Argentina Tel: 795-2146 Fax: 112716

INTERNATIONAL BUSINESS CENTER

Sra. Isabel Sánchez Maldonado Av. Pte. R. Saenz Peña 832, Piso 1 Buenos Aires (1388) Argentina Tel: 476-0150/ 59 Fax: 476-1900

BECH ENTERPRISES

Sra. Mercedes Bech de Olazábal Huelguera 3271 Buenos Aires (1417) Argentina Tel: 501-3194 Fax: 501-3194

ELECTRICAL REQUIREMENTS

Argentina's electric current requires 220 V, 50 cycles.

TRADE SHOWS

The environmental market being at an early stage in Argentina, no major local trade shows exist where foreign suppliers can come and promote their products and services. Most environmental trade shows are held in North America. And unless there is sufficient need for local companies to invest in environment control, few potential Argentine clients attend the trade shows at the moment.

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el/Fax: 313-6843/ 7581/ 3299

r. R. TRADUCCIONES 18. Elsa D'Onofrio Fraductora 1. Alvarez 647, Pisco 4. "13" Nuenos Aires (1414) Argentina Fel: 952-0232 Fax: 855-1520

elivia TAUSSIX era Silvia Taussik Traductora Irquiza 822 Vicente López, Buenos Aires (1936 Trgentina

INTERNATIONAL BUSINESS CEMTRA Sra. Isabel Sánchez Maldonado Av. Pte. R. Saenz Peña 332, Sizo 1 Suenos Aires (1388) Argentina

> BECH ENTERPEISES Sra Marcedes Bech de Glassba Huelguera 3271 Buenos Aires (1417) Argantina Argantina

CONTRACTOR STATISTICS

Andresses alectric current requires 220 v, ou creates.

SWOMES BEAR

The environmental market being at an early stage in Algentina, no major local trade shows exist where foreign suppliars can come and promote their products and services. Most environmental trade shows are held in North America. And unless there is sufficient need for local compasies to invest is environment control, tew potential Arcentine clients attend the trade shows at the moment.

LOCAL OR INTERNATIONAL BUSINESS PERIODICALS TO BE CONSIDERED FOR ADVERTIZING BY CANADIAN EXPORTERS

Local business periodicals include:

Empresa & Medio Ambiente Sarmiento 1452, Piso 1, "B" (1042) Buenos Aires Argentina Telefax: 372-9870 Published monthly by Sánchez Arana & Asociados.

Gerencia Ambiental Alsina 943, Piso 8 (1088) Buenos Aires Argentina Published monthly.

International business periodical:

Prevención de la Contaminación 3300 South Gessner Suite 118 Houston, Texas 77063 USA Fax: 1-(713) 266-6657

Monthly publication. *Highly recommended* for companies that wish to advertize their products or services for Latin America, especially Mexico. Issues discussed are: waste management, remediation, monitoring, recycling, and detection.

RELEVANT MARKET STUDIES

No extensive market study on the environmental market has been compiled recently, since the market is not yet structured. However, interested companies may wish to contact environmental consultants in Argentina (re: Appendix 4).

coal business periodicals include:

Smpresa & Medio Ambiente Sarmiento 1452, Piso 1, "B" (1042) Buenos Aires Argentina Celefax: 372-9870 Published monthly by Sánchez Arana & Asociados

> Gerencia Ambiental Alsina 943, Piso 8 (1088) Buenos Aires Argentina Published monthly.

International business periodical

Prevención de la Contaminacion 1300 South Gesansı Nuite 118 Souton, Texas 77053 18A 18A 18X: 1-(713) 265-5657

ionthly publication. Highly recommended for companies that wish to dvertize their products or services for Latin America, eepsoially exico. Issues discussed are: waste management, remediation, onitoring, recycling, and detection.

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to extensive market study on the environmental market may been compiled recently, since the market is not yet structured. However, interested companies may wish to contact environmental moneultents in Argentina (re: Appendix 4).

CONCLUSION

The environmental market being in its early stages, it is difficult to assess its size and exactly how it will grow in the future. However, increasing awareness of the damage done to the environment has pressured the government to legislate the dumping of wastes and regulatory agencies have started to enforce environmental laws. This means that demand for environmental products and services is present and will surge in the future. Many local companies do need financing but the market is growing and experienced foreign suppliers are already making there presence felt. Canada's expertise in the environment should be promoted more strongly and companies should take advantage of the business opportunities that are available in Argentina and Mercosur.

For further assistance on recent issues concerning the environmental sector in Argentina, companies should contact the Canadian Embassy in Buenos Aires:

Canadian Embassy to the Argentine Republic Commercial Division Tagle 2828 (1425) Buenos Aires Tel: 011-54-1-805-3032 Fax: 011-54-1-806-1209 Commercial Officer (environmental issues): Elena Masciarelli

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> Anadian Nabasay to the Argentina Republic Commercial Division Nagle 2828 (1425) Buence Aires Pel: 011-54-1-805-2032 Pax: 011-54-1-805-1209 Commercial Officer (environmental issues): Elene

Appendix 1

METALLURGICAL AND CHEMICAL INDUSTRIES

ACINDAR INDUSTRIA ARGENTINA DE ACEROS S.A. (Steel Works) Dr. Ignacio Arieta 4936 (1766) La Tablada, Pcia. de Buenos Aires Tel: 484-6000 Fax: 484-5700 Presidente: Ing. Arturo Tomás Acevedo

F.V. S.A. GRIFERIA (Metal Works) B. de Irigoyen 1053 (1602) Florida, Pcia. de Buenos Aires Tel: 730-1000 Fax: 730-1040/ 0785 Presidente: Sr. Rodolfo J. Viegener

FERRUM S.A. (Metal Works) España 496 (1870) Avellaneda, Pcia. de Buenos Aires Tel: 222-1500 al 1516 Ventas: 222-1171/ 76/ 80

Fax: 222-1176 Presidente: Ing. Rodolfo Viegener

GUILLERMO DECKER S.A.I.C.A.F.I. (Metal Works) <u>Administración</u> Osvaldo Cruz 3101 (1294) Capital Federal Tel: 303-4300/09 Fax: 303-0229 Presidente: Sr. Guillermo A. Decker

S.K.F. ARGENTINA S.A. (Metal Works) Perú 545 (1068) Capital Federal Tel: 334-2030/37 Fax: 342-4518 Presidente: Sr. Raúl Gaspar

Appendix 1

METALLURGICAL AND CHEMICAL INDUSTRIES

CINDAR INDUSTRIA ARGENTINA DE ACEROS S.A. (Steel Wode Dr. Ignacio Aneta 4936 (1766) La Tablada, Poia, de Buenos Altes Tel: 434-8000 Fest 464-5700 Presidentet Ing, Artino Tomás Acevado

F.V. S.A. GRIFERIA (Rietal Works)
B. de Ingoyan 1053
(1602) Florida, Pola. de Buenos Altes
Tel: 730-1000
Fax: 730-1040/ 9785
Presidante: St. Rodolfo J. Viegener

FERRUM S.A. (Menal Works) España 498 (1870) Aveilanada, Pola de Buenos Aixes Tel: 222-1500 al 1516 Vantas: 222-1171/ 78/ 60 Fax: 222-1176 Presidents: Ing. Rodstlo Viegenet

DilLLERMO DECKER S.A.I.C.A.F.L (20212) Workst <u>Admiaistración</u> Osvaldo Cruz 3191 (1294) Capital Federal Tel: 303-4300/ 08 Fax: 303-0228 Presidenter Sr. Golliermo A. Deckar

> S.K.F. ARGENTIMA S.A. (Metal Wooses) Perd 545 (1068) Capital Federal Tal: 334-2030/ 37 Fax: 342-4518 Presidente: Sr. Radi Gaspat

SIDERCA S.A. (Steel Works) Av. Leandro N. Alem 1067, Piso 27° (1001) Capital Federal Tel: 318-2100 Fax: 313-9343/ 6165 Presidente: Ing. Roberto Rocca

ATANOR COMPAÑiA NACIONAL PARA LA INDUSTRIA QUIMICA S.A. (Organic Chemicals) Tte. Gral. J.D.Perón 646/ 50 P.3 (1038) Capital Federal Tel: 393-5111/ 14/ 23/ 31 Fax: 393-6427 Presidente: Salvador L. Carbó

BASF ARGENTINA S.A. (Polystyrene, Acrylics, Agrochemicals, Plastics) Av. Corrientes 327 P.17 (1043) Capital Federal Tel: 311-0017/9 Fax: 312-8157 Presidente: Sr. Dieter Wagner

> CARBOCLOR INDUSTRIAS QUIMICAS S.A.I.C. (Alcohols, Glycols, other Organic Chemicals) Tucumán 744, Piso 12° (1049) Capital Federal Tel: 325-8469 al 75 Fax: 334-5872 Presidente: Ing. Arnoldo A. Girotti

COMPAÑIA CASCO S.A.I.C. (Alcohols, Resins, Adhesives) Paseo Colón 728, Piso 8° (1063) Capital Federal Tel: 334-1424/6/ 58/ 6722/ 3/ 4 Fax: 331-2140 Presidente: Sr. Ricardo Marcelo Monte

DOW QUIMICA ARGENTINA S.A. (Organic Chemicals) Leandro N. Alem 896 P.7 (1001) Capital Federal Tel: 312-7020 al Fax: 311-9537 Presidente: Sr. Juan Pedro Ziemke SIDERCA S.A. (Breal Works) Av. Leandro N. Alem 1087, Plan 27° (1001) Capital Federal Tel: 318-2100 Fax: 313-8343/ 6165 Presidente: Ing. Roberto Rocca

ATANOR COMPANIA NACIONAL PARA LA INDUSTRIA CUINIGA S.A. (Organic Chemicals) Tte. Grat. J.D.Penéa 648/ 50 P.3 (1038) Capital Federal Tel: 383-6111/14/23/31 Fax: 383-6427 Presidente: Saivador L. Carbó Presidente: Saivador L. Carbó

BASE ARGENTIKA S.A. (Polyatytana, Aorylics, Agrochamicala, Plastics) Av. Comenues 327 P.17 (1043) Capital Federal Feb: 311-00131 3 Pax: 313-8157 Presidente: S. Dieter Wagner

> CAREOCLOR INDUSTRIAS CURARCAS S.A.LC. (Alcohois, Giyools, other Organic Chamicals) Tucumán 744, Pico 12⁴ (1049) Capital Feastal Tai: 325-8459 al 75 Fax: 334-5872 Presidents: Ing. Amoldo A. Cirqtti

COMPANIA CASCO S.A.I.C. (Alcohols, Reelns, Adnesivas) Passo Colon 723, Piso 8° (1063) Capital Federal Tel: 334-1424/6/ 58/ 6722/ 3/ 4 Passidontat Sr. Ricardo Marcelo Monta

DOW QUIMICA ARGENTINA S.A. IOrganic Chedhoden Lasndra N. Alem 896 P.7 (1001) Capital Federal Tal: 312-7020 al Fax: 311-9537 Presidents: Sr. Juan Pedro Ziemke

DUPONT ARGENTINA S.A. (Freon, Nylon, Polyethylene, Polypropylene) Av. E. Madero 1020 (1106) Capital Federal Tel: 311-0067 312-2011/ 19 319-4390 Fax: local: 311-9331 Presidente y Gerente General: Dr. Luis A. Ponferrada

HOECHST ARGENTINA S.A. (Fine Chemicals, Pharmaceuticals)

Av. Intendente Tomkinson 2054 (1642) San Isidro, Pcia. de Buenos Aires Tel: 742-3036/ 37/ 38 Fax: 742-3000 Presidente: Sr. Rudolf Dallwitz

INDUPA S.A.I.C. (Polyethylene - Organic Chemicals) / MONOMEROS VINILICOS S.A. Viamonte 1494 (1055) Capital Federal Tel: 375-4715/4719/375-4723/28 Fax: 375-2369 Presidente: Sr. Oscar Saggese

IPAKO INDUSTRIAS PETROQUIMICAS ARGENTINAS S.A. (Ethylene, Polyethylene) Av. de Mayo 701 (1084) Capital Federal Tel: 342-6073/ 8445 Fax: 334-5170/ 3 Presidente: Sr. Federico J. L. Zorraquín

MANUFACTURA DE FIBRAS SINTETICAS S.A. (MAFISA)

(Synthetic Fibres) Esmeralda 130, Piso 15° (1035) Capital Federal Tel: 394-1794/ 1833/ 2005/ 2030 Fax: 322-5175 Presidente: Ing. Jorge E. Curi

MONSANTO ARGENTINA S.A.I.C.

(Synthetic Fibres, Agrochemicals, Resins) Maipú 1210, Piso 6° (1006) Capital Federal Tel: 313-2429/2333/3136/5967/6119 Fax: 313-2447 Presidente: Ing. Carlos A. Popik

OUPONT ARGENTINA S.A. (Freen, Nylen, Polystinylans, Pelystopylene) Av. E. Madero 1020 (1106) Capital Federal Tel: 311-0067 312-2011/19 319-4390 Fax: local: 311-9331 Presidente y Gerente Ganeral: Dr. Luis A. Ponferrada

HOECHST ARGENTINIA S.A. (Fine Chemicale, Phermaceuticals) Av. Intendente Tomkinson 2054 (1642) San Isidro, Pola. de Buenda Aites Tel: 742-3036/ 37/ 38 Fax: 742-3000 Presidente: Sr. Rudolf Daliwitz

> INDUPA S.A.I.C. (Polyethylane - Organic Chemical / MONOMEROS VIMILIOOS S.A. Vismonte 1494 [1035] Capital Federal Tel: 375-4715/4719/ 375-4723/28 Fax: 375-2369 Presidente: St. Oscar Saggesa

IPAKO IRDUSTRIAS PETHOOLUMAICAS ARGENTIMAS S.A (ESkylens, Polyeshylens) Av. de Mayo 701 (1084) Capital Federal Ten: 342-6073/ 6445 Fax: 334-5170/ 3 Presidente: St. Federico J. L. Zorraquía

MANULACTURA DE FILIRAS EINTETICAIS 91AL (MAAFREA (Syntheato Fibree) Esmaralda 130, Piso 15° (10351 Cepital Fedural Tel: 394-1794/ 12331 2005/ 2030 Fax: 322-5175 Presidenter Ing. Jorge E. Curl

> MONBAATO ARGENTINA S.A.L.C. (Synthatic Fibres, Agrochemicals, Reshes) Maiph 1210, Piso 6* (1906) Capital Federal Teb 313-2429/2333/3136/5967/6119 Fax: 313-2447 Presidents, Inc. Carlos A. Popik

PASA PETROQUIMICA ARGENTINA S.A.I.C.F. y de M. (Petrochemicals) Maipú 1, P.9 (Edif. Pérez Companc) (1599) Capital Federal Tel: 345-7630 Fax: 345-7640 Presidente: Sr. Tadeo Perich

PETROKEN PETROQUIMICA ENSENADA S.A. (Polypropylene)

Sarmiento 1230, P. 6 y 7 (1041) Capital Federal Tel: 382-6342 Fax: 381-5024 Presidente: Sr. Leopoldo J.M. Garcés Castiella

PETROQUIMICA CUYO S.A.I.C. (Polypropylene) Tte. Gral J.D.Perón 646, Piso 8° (1038) Capital Federal Tel: 326-4091/3 476-3486 Fax: 394-6940 Presidente: Ing. Oscar A. Vicente

PETROQUIMICA RIO TERCERO S.A. (Petrochemicals) 25 De Mayo 565, P.8 (1339) Capital Federal Tel: 312-7581 al 86

Presidente: Dr. Salvador L. Carbó

PAPER MILLS

ALTO PARANA S.A.

Rivadavia 413, P.8 (1002) Capital Federal Tel: 329-9559 Fax: 329-9572/ 73 Director: Dr. Horacio Rubinstein

ARCOR S.A.I.C.

Esmeralda 130, Piso 21 (1035) Capital Federal Tel: 325-7394 al 7 Fax: 394-3250/ 5571 Presidente: Cdor. Luis Alejandro Pagani

e Zovironmentel Market in Argentina .

PASA PETROOUIMICA ARGENTINA S.A.I.C.F. y de M. (Petrochemicals) Maipú 1, P.9 (Edif. Pérez Compand) (1599) Capital Federal Tek: 345-7630 Fax: 345-7640 Presidente: Sr. Tadeo Perich

PETROXEM PETROCLINMICA ENSENADA S.A. (Polypropylene) Sarmiento 1230, P. 6 y 7 (1041) Cepital Federal Telt 382-6342 Fax: 381-5024 Presidente: Sr. Leopoldo J.M. Carcés Castiella

> PETROQUIMICA CUYO S.A.I.C. (Polypropyland) The. Grel J.D.Parón 646, Pice 3° (1038) Capital Federal Tel: 326-4091/3 475-3488 Fax: 394-6940 Presidente: Ing. Oscar A. Vicente

PETROOUMNICA RIO TERCERO S.A. (Petrochemicals) 25 De Mayo 565, P.8 (1339) Capital Federal Tel: 312-7631 al 85 Presidente: Dr. Salvador L. Carbo

PAPER MILLS

ALTO PARANA S.A. Nivadavia 412, P.8 (1002) Capital Federal Tel: 329-9559 Fax: 329-9572/ 73 Directort Dr. Horacio Rubinaton

ANGLAR STATUTE Esmaraida 120, Pizo 21 (1035) Capital Federal Tel: 325-7394 al 7 Fax: 394-3250/ 5571 Praeldente: Cdor. Luis Alajandro Pagao

MASSUH S.A., PAPELES ESPECIALES DIV.

Rondeau 3241 (1262) Capital Federal Tel: 924-5002/ 4805 Fax: 924-4700 Presidente: Sr. Héctor Daniel Massuh

LA PAPELERA DEL PLATA S.A.

Av.L.N.Alem 690, Piso 15 (1001) Capital Federal Tel: 313-3679/ 3834/ 3701 Fax: 312-6777 Presidente: Sr. Juan Navarro

CELULOSA ARGENTINA S.A.

Tucumán 633 (1049) Capital Federal Tel: 326-6012 Fax: 322-9301 Presidente: Sr. Ramoyd Miezelis

Ter (0833) 24015/ 22475 Administrator Ing. Jorge Matochi DIRECCION PROVINCIAL DE AQUA Y RAMFASSIENTO (DIPAS) DE CORDOSA Hambero Prime 607 ISOOCI Contoba, Pola, de Cordoba Ter (051) 233011/ 237000 / 235154 Fai: 051) 233011/ 237000 / 235154

> OMPROCION PROVINCIAL DE OBRAS BASETANIAS DE SANTA DE Patricio Cultan 6200 130001 Sento Pe, Pais, de Santa Fe Fel: 19421 800001 90086 Editinizmadas Dr., Encento Caya

MASSOH S.A., PAPELES ESPECIALES DIV. Rondeau 3241 (1262) Capital Federal Tel: 924-8002/ 4805 Fax: 924-4700 Presidente: Sr. Háctor Daniel Massuh

> LA PAPELERA DEL PLATA S.A. Av.L.N.Aism 680, Piso 15 (1001) Capital Federal Tel: 313-3679/3834/3701 Fax: 312-6777 Presidente: Sr. Juan Navarro

CELULOSA ARCENTRIA S.A. Tucuman 833 (1049) Capital Federal Tel: 325-6012 Faxt 322-9361 heatdante: Sr. Ramoyd Miazalis

PROVINCIAL SANITATION (SEWAGE) SERVICES (COMPANIES THAT MAY REQUIRE SERVICES AND TECHNOLOGIES)

OBRAS SANITARIAS BUENOS AIRES

Calle 5, entre 39 y 40, N° 366 (1900) La Plata, Pcia. de Buenos Aires Tel: (021) 21-6167/ 24-8825 Fax: (021) 25-3766 Administrador General: Contador Luis Sanguinetti

ENTE TRIPARTITO OBRAS Y SERVICIOS SANITARIOS (ETOSS)

Av. Callao 976 (1023) Capital Federal Tel: 811-4677/9043 Fax: 813-1866 Presidente: Ing. Horacio Reolfi

OBRAS SANITARIAS CATAMARCA

Rivadavia 365 (4700) S.F. del V. de Catamarca, Pcia. de Catamarca Tel: (0833) 24016/ 22475 Administrador: Ing. Jorge Marcolli

DIRECCION PROVINCIAL DE AGUA Y SANEAMIENTO (DIPAS) DE CORDOBA

Humberto Primo 607 (5000) Córdoba, Pcia. de Córdoba Tel: (051) 237011 / 237900 / 233154 Fax: (051) 226119 Presidente: Ing. Víctor Gianobolli

DIRECCION PROVINCIAL DE OBRAS SANITARIAS DE SANTA FE

Patricio Cullen 6200 (3000) Santa Fe, Pcia. de Santa Fe Tel: (042) 60000/ 60066 Administrador: Dr. Roberto Gaya

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Appendix 2

PHOVINCIAL SANITATION (SEWAGE) SERVICES (COMPANIES THAT MAY REQUIRE SERVICES AND TECHNOLOGIES)

OBRAS SAMITARIAS BUENOS AIRES Calle 5, antre 39 y 40, Nº 366 (1900) La Plata, Pola, de Suenos Aires Tel: (021) 21-6167/ 24-8825 Pax: (021) 25-8766

ENTE TRIPARTITO OBRAS Y SERVICIOS SANITARINS (ETOSS) Av. Celleo 976 (1023) Cepital Federal Tel: 811-4677) 9043 Fax: 813-1866 Presidente: Ing. Horacio Reolfi

Connes Senar Anas CATAMARGA Rivatevia 365 (4700) S.F. del V. de Cetemarca, Pola, de Cetemarca Tel: (0833) 24016/ 22475 Administrador: Ing. Jorge Marcolli

DURECCION PROVINCIAL DE AGUA Y SANSAMIENTO (DIPAS) DE COMDOBA Mumberte Preso 607 (5000) Córdobe, Pora, de Cordoba Tel: (051) 237011 / 237000 / 233154 Fax: (051) 2261 19 Presidente: ino Victor Giancioli

DIRECCION PROVINCIAL DE OBRAS SAMPTARIAS DE SANTA FE Patricis Guilles 6200 (3000) Santa Fa, Pola, de Santa Fe Tel: (042) 600007, 60066 Administrador: Do Roberto Saya

ADMINISTRACION DE OBRAS SANITARIAS DE MISIONES

Av. López y Planes 2577 (3300) Posadas, Pcia. de Misiones Tel: (0752) 34489/ 33515/ 24378 Interventor:Ing. César Raúl Humada

EMPRESA PROVINCIAL DE AGUA Y SANEAMIENTO (EPAS) DE NEUQUEN

Santiago del Estero 426 (8300) Neuquén, Pcia. de Neuquén Tel: (099) 41402 int. 21 / 5956/7 Fax: (099) 30413 Presidente: Sr. Anibal Sixto Cocco

DIRECCION PROVINCIAL DE AGUA DE RIO NEGRO

San Martín 249 (8500) Viedma, Pcia. de Río Negro Tel: (0920) 23078/ 79/ 23565/ 25021 Fax: (0920) 23538 Superintendente: Fernando Erico

DIRECCION PROVINCIAL DE OBRAS SANITARIAS DE SALTA

España 877 (4400) Salta, Pcia. de Salta Tel: (087) 311366 Director: Ing. Luis Borelli

DIRECCION PROVINCIAL DE OBRAS SANITARIAS DE SANTIAGO DEL ESTERO

Libertad 688 (4200) Santiago del Estero, Pcia. de Santiago del Estero Tel: (085) 211288 / 213205 / 215613 Fax: (085) 211303 Director: Sr. Miguel del Valle Ponce

SERVICIOS PUBLICOS DE SANTA CRUZ S.E.

Salta 75 (9400) Río Gallegos, Pcia. de Santa Cruz Tel: (0966) 22709 Fax: (0966) 22903 Director: Raúl Lascano

AHIJIGOPUA AL JONTAN JAT

ADMINISTRACION DE OBRAS SAMITARIAS DE MISIONES Av. Lónez y Planas 2577 (3300) Posadas, Pola, de Misiones Tall, (0752) 34 469/ 335 15/ 24378 interventoring, Casor Radi Humada

EMPRESA PROVINCIAL DE AGUA Y SAMEARMEAN (EPAS) DE REUQUEN Scotlago del Estero 428 (8380) Nerquén, Pola, de Nauquén Feurio381 41402 int. 21 / 5555/7 Francio381 41402 int. 21 / 5555/7 Presidence: Sc. Antief Sato Cooce

> DIRECCIÓN PROVINCIAL DE ACOA DE NO ABEANO San Martan 249 165001 Vicdina Fala, de Río Negro Fal, 103201 23078/ 291 23565/ 25021 Eax: 109201 23538

DIRECCION PROVINCIAL GE CERAS SAMITAMAS DE SALTA Espens 877 (4.100) Sake Franc de Salta Tau (057) 311388 Directori log. Lus Barelli

DIRECCION PROVANCIAL DE OBBAS SALIT ANAAS DE SARTIAGO DEL ESTE Lacited 1983 HAZOOI Santago del Betero, Púia, de Santiago del Estero Faso (CRSI-211203 / 215673) Faso (CRSI-211203

> SERVICIOS PUBLICOS DE SAMTA CHUZ S.E. Scila (5 19400) Río Gallagos Tola, de Santa Cruz Tel: 100601 22709 Fax: 109661 22303 Director: Hauri Lacano

DIRECCION DE AGUA POTABLE Y SANEAMIENTO DE JUJUY

Santibañez 1602, Piso 3° (4600) San Salvador de Jujuy, Pcia. de Jujuy Tel: (0882) 29076 / 22417 / 28705 Fax: (0882) 29076 Director: Ing. José Luis Izquierdo

OBRAS SANITARIAS DE SAN JUAN S.E.

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Possible distributors (representatives, agents)

<u>Products</u>: filters, cleaners, absorbers, monitoring equipment, etc... <u>Services:</u> project management, process optimization, waste treatment plant design, etc...

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ANDRADE Y CIA. S.R.L.

Diógenes Taborda 841 (1437) Capital Federal Tel: 911-4817

AUTOMAT MEDICION S.R.L. Morlotte 175

(1427) Capital Federal Tel: 555-0055

CLAFIL S.A.

Av. San Pedrito 491, Piso 1 Capital Federal Tel: 637-0721 Fax: 612-0151 613-7424

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CRECER PROTECCION S.R.L. Brasil 1700 (1154) Capital Federal Tel: 304-6416

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Possible distributors (representatives, agents) <u>Products</u>: filters, cleaners, abscroers, monitoring equipment, etc... <u>Services:</u> project management, process optimization, waste treatment plant design, etc...

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DANIEL MAQUIEIRA

Luis Lhoner 580 (1706) Haedo, Pcia. de Buenos Aires Tel: 628-0432

FELIX KESSLER

Calle 63 (Almafuerte) 2054 (1650) Villa Maipú, Pcia. de Buenos Aires Tel: 753-3328

FILTRON (Industrial filters)

Aviador F. y Torrealday 714 (1684) El Palomar, Pcia. de Buenos Aires Tel: 751-7524 Fax: 758-3947

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