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Papacotsia, Serge.  
Global market opportunities  
report 43276825

**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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\*\* Please note: To call from Canada, all telephone and fax numbers (in Argentina) listed in this report, dial 011-04 first, and then 1 if no area code is listed in parentheses.



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**SYNOPSIS**

There is no more doubt about who will lead the country for the next four years, until 1995. On Sunday May 14 1993, Dr. Carlos Menem was elected for a second consecutive term as Argentina's President. Therefore, we can at least expect a continuity in economic policy and the maintenance 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, Mexico, 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), the market is therefore at a very early stage of its existence.

# **GLOBAL MARKET OPPORTUNITIES REPORT**

In contemplating business opportunities in the country, it is important to understand the applicable legal framework. Provincial laws for environmental affairs and they usually draw their own laws on matters such as water, air, waste, pesticides, etc. Federal laws are to provide the basis of legislation to be implemented at the provincial level. Provincial agencies ecological problems. In general, the enforcement of these laws is very lax and control is exercised in each of the 23 Argentine provinces.

## **THE ENVIRONMENTAL MARKET IN ARGENTINA**

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**JUNE 1995**

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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.



**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).



## The Environmental Market in Argentina

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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 safeguard 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



## The Environmental Market in Argentina

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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.



## The Environmental Market in Argentina

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.



## The Environmental Market in Argentina

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'ENVIRONNEMENT, 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).



## **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 newly-formed 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



## The Environmental Market in Argentina

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 know-how 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 accessories). Capital goods have 0% import duty rate.

Source: Nomenclatura común del Mercosur, March 1995 (Nomenclatura del Comercio Exterior)



## The Environmental Market in Argentina

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:

#### **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



The Environmental Market in Argentina

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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.



## The Environmental Market in Argentina

### **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).



**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 their 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



## 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)

Administración  
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



**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



**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



**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

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**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



**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

**OBRAS SANITARIAS CATAMARCA**

Rivadavia 385

(4700) S.F. del V. de Catamarca, País. de Catamarca

Tel (0633) 24018/ 22475

Administrador: Ing. Jorge Matocelli

**DIRECCION PROVINCIAL DE AGUA Y SANEAMIENTO (DIPAS) DE CORDOBA**

Humberto Primo 607

(5000) Córdoba, País. de Córdoba

Tel: (051) 2376117 2379001 235154

Fax: (051) 226119

Presidente: Ing. Víctor Giacobelli

**DIRECCION PROVINCIAL DE OBRAS SANITARIAS DE SANTA FE**

Patricio Cullen 5290

(3000) Santa Fe, País. de Santa Fe

Tel: (042) 500001 50086

Administrador: Dr. Roberto Gaya



## Appendix 2

### **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



**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



**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.**

O. I. de la Roza 272 Oeste  
(5400) San Juan, Pcia. de San Juan  
Tel: (064) 221490/ 1/ 2/ 3  
Fax: (064) 221493  
Presidente: Héctor D. Tomás

**DIRECCION PROVINCIAL DE OBRAS SANITARIAS DE TUCUMAN**

Monteagudo 129  
(4000) San Miguel de Tucumán, Pcia. de Tucumán  
Tel: (081) 310162 / 310297  
Fax: (081) 310297  
Director: Ing. Benjamín García Posse

**SERVICIO DE AGUA Y MANTENIMIENTO DE CHACO**

9 de Julio 788  
(3500) Resistencia, Pcia. del Chaco  
Tel: (0722) 21060/ 23552/ 26070/ 21377  
Fax: (0722) 24633  
Director: Ing. Alfredo Rezanowicz

**DIRECCION PROVINCIAL DE OBRAS SANITARIAS DE ENTRE RIOS**

Buenos Aires 219  
(3100) Paraná, Pcia. de Entre Ríos  
Tel: (043) 230144/ 213920  
Fax: (043) 216905  
Director: Ing. Carlos Alberto García

**ADMINISTRACION PROVINCIAL DEL AGUA LA PAMPA**

Olas Coaga 540  
(6300) Santa Rosa, Pcia. de La Pampa  
Tel: (0954) 23645 / 27046  
Fax: (0954) 33896  
Administrador: Geol. José Ormaechea



**EMPRESA PROVINCIAL DE SERVICIOS SANITARIOS DE LA RIOJA (EOSLAR)**

J.V. González 9  
(5300) La Rioja, Pcia. de La Rioja  
Tel: (0822) 27041  
Director: Ing. Fernando de la Vega

**OBRAS SANITARIAS MENDOZA S.E.**

Belgrano 920  
(5500) Mendoza, Pcia. de Mendoza  
Tel: (061) 25-4999  
Fax: (061) 23-3075  
Vicepresidente: Roberto José González

**ADMINISTRACION GENERAL OBRAS SANITARIAS DE FORMOSA**

Napoleón Uriburu 51  
(3600) Formosa, Pcia. de Formosa  
Tel: (0717) 25891 / 29257  
Fax: (0717) 26739  
Administrador General: Ing. Hugo César Puyo

Office of External Relations  
1300 New York Ave., N.W.  
Washington, D.C. 20577, USA  
Tel: (202) 623-1397  
Fax: (202) 6253-1403

Argentine Office  
Esmeralda 130, Pisos 19 y 20  
Casilla de Correo #181, Sucursal 1  
Buenos Aires, Argentina  
Tel: 334-1758  
Fax: 334-8833  
Representative: José María Puppo

**CAMARA EMPRESARIA DE MEDIO AMBIENTE - CEMA**

Av. Córdoba 266, Piso 6  
1054 Buenos Aires  
Tel/Fax: 322-5513/ 2520/ 6446  
Presidenta: Dr. Carlos Adlerstein



**Appendix 3**

**ASSOCIATIONS & GOVERNMENT ENTITIES**

**SECRETARIA DE RECURSOS NATURALES Y AMBIENTE HUMANO**

San Martín 459  
(1004) Capital Federal  
Tel: 322-1063/ 2764/ 3536 325-7680/ 1979/ 1988/ 2269  
Fax: 325-7679  
Secretaria: Ing. María Julia Alsogaray

**ASOCIACION PARA EL DESARROLLO DE LA GESTION AMBIENTAL (ADEGA)**

Jean Jaurés 315  
(1225) Buenos Aires  
Tel/ Fax: 866-2100  
Directora ejecutiva: Dra. María del Carmen Longa Virasoro

**INTER-AMERICAN DEVELOPMENT BANK (IDB)**

**Office of External Relations**  
1300 New York Ave., N.W.  
Washington, D.C. 20577, USA  
Tel: (202) 623-1397  
Fax: (202) 6253-1403

**Argentine Office**  
Esmeralda 130, Pisos 19 y 20  
Casilla de Correo #181, Sucursal 1  
Buenos Aires, Argentina  
Tel: 334-1756  
Fax: 334-6633  
Representative: José María Puppo

**CAMARA EMPRESARIA DE MEDIO AMBIENTE - CEMA**

Av. Córdoba 966, Piso 6  
(1054) Buenos Aires  
Tel/ Fax: 322-5513/ 2520/ 5446  
Presidente: Dr. Carlos Adlerstein



**CAMARA ARGENTINA DE LA PEQUEÑA Y MEDIANA EMPRESA**

Lavalle 643, Piso 7, Oficina "A"

(1047) Capital Federal

Tel: 322-9724

Presidente: Dr. Alberto Jorge Brunatti

**UNION INDUSTRIAL ARGENTINA (UIA)**

**DPTO. DE MEDIO AMBIENTE Y TECHNOLOGIA**

A.L.N. Alem 1067, Piso 11

Buenos Aires

Tel: 313-2117

Fax: 313-2413

Presidente: Dr. Jorge A. Mazza

**SECRETARIA DE AGRICULTURA, GANADERIA Y PESCA**

Av. Paseo Colón 982

(1063) Capital Federal

Tel: 349-2000/ 2500

Fax: 349-2504

Secretario: Ing. Felipe Solá

**LATINOCONSULT S.A.**

Supacha 1067, Piso 3

(1008) Buenos Aires

Tel: 313-3519 313-6937

Fax: 313-4718

Presidente: Ing. Andrés Mattana Besozzi

**I.M.P. CONSULTOR EN MEDIO AMBIENTE S.A.**

Arcos 1378

(1020) Buenos Aires

Tel: 734-2071 781-8135

Presidente: Juan Carlos A. Ferrer de Martínez Priato

**AMBIENTAL S.A.**

Córdoba 906, piso 8

(1084) Capital Federal

Tel: 322-2520/5513

Fax: 322-5446

Presidente: Ing. Emilio Apud



## Appendix 4

### CONSULTANTS

#### **CONSULTORES AMBIENTALES S.R.L.**

Arq. Ricardo Jilek  
Dra Cristina E. Maiztegui  
Av. Santa Fe 1592, Piso 4, "G"  
(1060) Buenos Aires  
Tel/ Fax: 815-7397

#### **RECA CONSULTORES S.R.L.**

Sr. Alberto Ghiglione  
Gerente  
Alsina 3365  
(1602) Florida, Pcia. de Buenos Aires  
Tel: 730-0271 Fax: 730-0271

#### **VALLEJOS - BOLDI S.A.**

Sr. Eduardo Bruzzi  
Vice Presidente  
Maipú 378, Piso 2  
(1084) Buenos Aires  
Tel: 393-8596/ 8599 Fax: 326-8487

#### **LATINOCONSULT S.A.**

Suipacha 1067, Piso 3  
(1008) Buenos Aires  
Tel: 313-3519 313-6937  
Fax: 313-4718  
Presidente: Ing. Andrés Mattana Besozzi

#### **I.M.P. CONSULTORA EN MEDIO AMBIENTE S.A.**

Arcos 1378  
(1426) Buenos Aires  
Tel: 784-2071 781-8135  
Presidente: Beatriz Y. A. Ferrer de Martínez Prieto

#### **AMBIENTAL S.A.**

Córdoba 966, piso 6  
(1054) Capital Federal  
Tel: 322-2520/5513  
Fax: 322-5446  
Presidente: Ing. Emilio Apud



**Appendix 5**

**Possible distributors (representatives, agents)**

Products: filters, cleaners, absorbers, monitoring equipment, etc...

Services: project management, process optimization, waste treatment plant design, etc...

**ADREM CORPORACION IND. S.A.**

José P. Varela 3576  
(1417) Capital Federal  
Tel: 502-2145

**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

**CONISEHT S.R.L.**

F.J.S.M. de Oro 2613  
(1425) Capital Federal  
Telefax: 775-4710/ 4762 776-2065/ 2117

**CRECER PROTECCION S.R.L.**

Brasil 1700  
(1154) Capital Federal  
Tel: 304-6416



**NIVEL INGENIERIA AMBIENTAL Y LABORAL**

Arenales 3588, Piso 7  
(1425) Capital Federal  
Tel: 824-4702 983-6054

**PREVENT GAS**

Inclán 4185  
(1258) Capital Federal  
Tel: 925-4138

**BOKER S.A.I.C.I.F.A.**

Juan de Garay 2132/46  
(1636) Olivos, Pcia de Buenos Aires  
Tel: 795-4676/ 4851/ 4720  
Fax: 795-4851

**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

**INDELEC S.A.**

R. Castro 2719  
(1636) San Olivos, Pcia. de Buenos Aires  
Tel: 799-1451

**INQUINAT S.A.**

Calle 86, 5800  
(1650) San Martín, Pcia. de Buenos Aires  
Tel: 751-7876/ 7251



**JOAQUIN R. LAREU INGENIERIA S.R.L.**

Peña 456  
(1828) Banfield, Pcia. de Buenos Aires  
Tel: 242-3603

**PRODIMO S.A.**

Australia 438  
(1752) L. del Mirador, Pcia. de Buenos Aires  
Tel: 651-0302

**S.I.S. S.R.L.**

Borges 1772  
(1636) Olivos, Pcia. de Buenos Aires  
Tel: 413-4504

**SERMAN S.A.**

Calle 532, 669  
(1900) La Plata, Pcia. de Buenos Aires  
Tel: (021) 21-9437

**SERVICIOS INDUSTRIALES S.R.L.**

Sol de Mayo 496  
(5000) Córdoba, Pcia. de Córdoba  
Tel: (051) 89-3859

**SONOTEST**

España 334  
(3100) Paraná, Pcia. de Entre Ríos  
Tel: (043) 21-2965

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JOSQUIN R. LARAU INGENIERIA S.R.L.

Paña 488

(1828) Bantfeld, Pcia. de Buenos Aires

Tel: 242-3803

PRODIMO S.A.

Av. de la 438

(1782) C. del Mirador, Pcia. de Buenos Aires

Tel: 881-0302

S.L.S. S.R.L.

Borges 1772

(1888) Olivos, Pcia. de Buenos Aires

Tel: 413-4804

SERRAN S.A.

Calle 232, 889

(1800) La Plata, Pcia. de Buenos Aires

Tel: (021) 21-8437

SERVICIOS INDUSTRIALES S.R.L.

Bol. de Mayo 488

(5000) Córdoba, Pcia. de Córdoba

Tel: (0371) 89-3889

SONOTEST

Cañal 834

(2100) Paraná, Pcia. de Entre Ríos

Tel: (073) 21-2882

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