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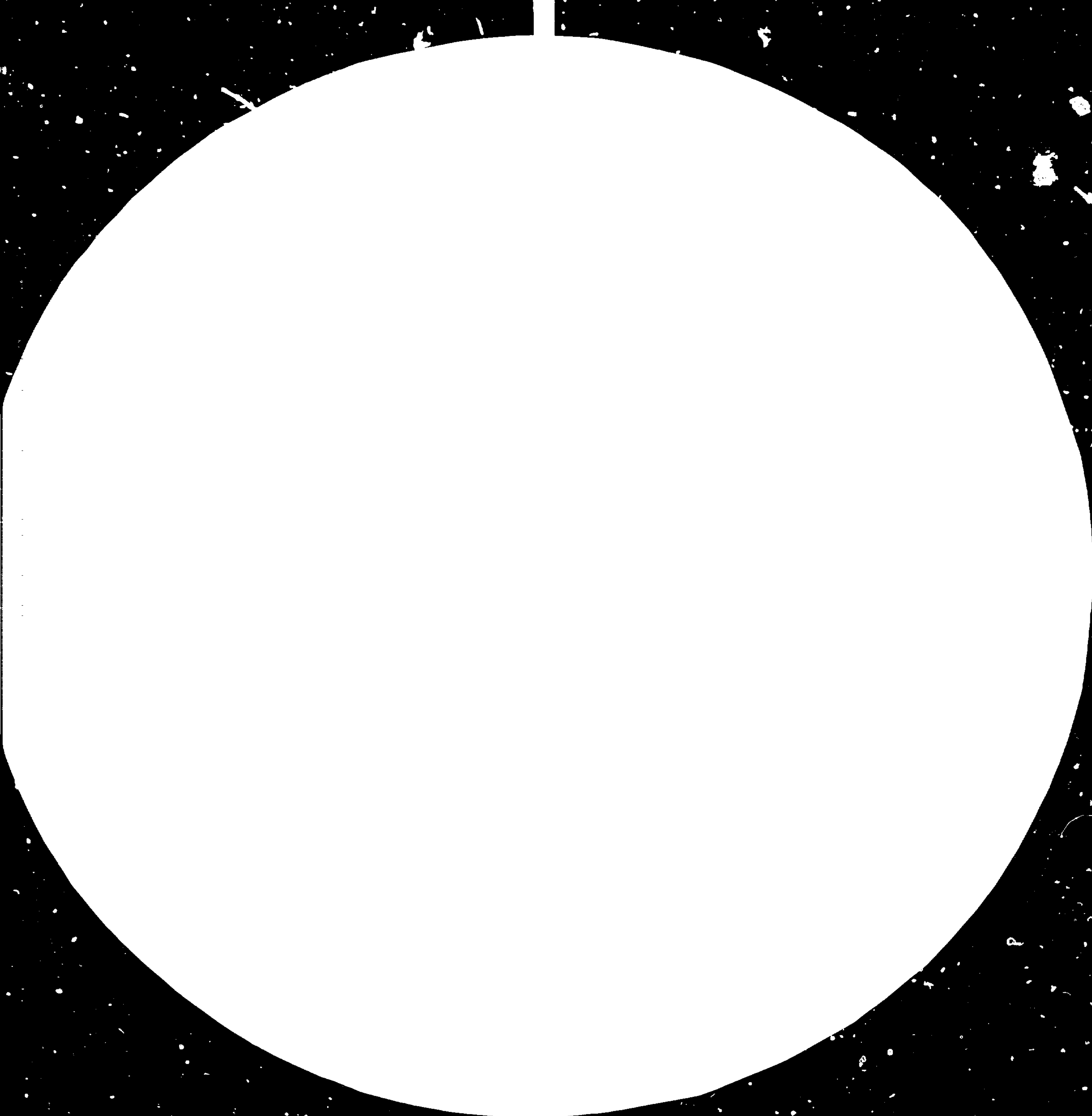

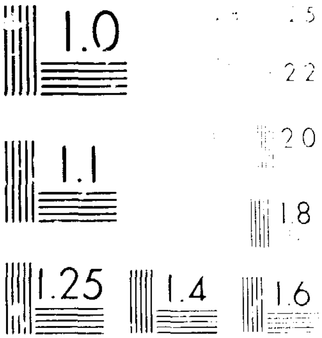
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THE SITUATION OF THE SYNTHETIC FIBRE INDUSTRY IN PERU*

by

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Introduction

Peruvian textile industry is in a prominent place among the production enterprises, employing 20% of the total of manufacturing industry persons and paying the best salaries.

The structure of textile industry has been changed considerably in the last twenty years. The area of Lima occupies the 80% of total employment, then it is followed by Arequipa, Cuzco, Huancayo, and in low scale Ica and Piura.

Most of textile industries depend greatly on few ones which supply them the raw material. Those are the factor of great incidence in the costs and obtaining them in quantity, opportunity, price and conditions of suitable payment.

We must remark that in Peru there are only few enterprises that are suppliers of rayon, polyester, polyamide and acrylics, all of them artificial and synthetic fibres of strong development in the last years.

Because of various reasons, there are competently big and small enterprises in spinning, weaving and needle industry. That has facilitated the permanent incorporation of new small enterprises in an excessive number of establishements for our reduced national market.

Our small market requires a diversification of products that goes against standarization and the production of long series of manufacturing. There is not the duly standarization of qualities, thus products of low quality compete to advantage with prices which don't keep relation with their costs because of bad information or disregard among the consumer public.

It is evident that this way is leading to a conglomerate of industries, which although they can maintain into our domestic market, at the moment customs barriers would be opened and they intend to compete in wider markets no protected, they will do in conditions of unfavorable costs and most critical is that they will not have suitable experience to adjust them in a fast way to those new demands. In this sense, we must recognize that we need higher economic and technological resources.

1. Production capacity

1.1 Installed capaci . Due to various factors by which textile industry in Peru is running through, it has been determined approximately that real efficiencies in synthetics and artificials fibres reach in average: at spinning mills: 80% and at weaving: 90%.

Synthetics and Artificials

	Spinnings (tons)	Weavings ton	Weavings Metres
Installed Capacity efficiency 100%	17,047	12,629	46,783
Highest real capacity	13,638	11,360	42,105

1.2 Utilized capacity. In 1979 spinning and weaving production reached the following volumes:

Spinnings (ton)	Weavings ton	Weavings Metres in thousands
12,202	9,003	35,3[illegible]1

1.3 Useless capacity.

	Spinnings	Weavings
Manufactured fibres	11%	21%

2. Raw material

2.1 Production

Production in Peru, generally, has developed with an accelerated rate of growth (23%), increasing its participation inro industrial sector.

In 1979, total production reached 27,113 tons corresponding approximately the 93% to synthetic fibre production and the 7% remainder to artificial fibre production.

Within synthetic fibres, we can observe that production of acrylic fibres share with 63% followed by polyester fibres with 27% and the polyamides with 10%.

2.2 Consumption

In general terms, the production of synthetic and artificial fibres supplies requeriments of market, generating a small surplus for export.

Nevertheless, if we analize in an independent way, the production of polyester and polyamide filaments, we observed that:

- In Peru most of types known as the most commercials in international market, satisfying the consumption.

- About Polyester, the most representative types in regard to its production are the Denier 150 and the 70/75, with 74% and 23% respectively.

The types less significant (45, 55 Denier) are those of less consumption, since in Peru there is a reduced number of machines which use those types.

- About polyamide, consumed quantities have had a constant demand with a tendency of decreasing. Most of those filaments are used in manufacture of hosiery and socks.

3. Market

Production of synthetic and artificial sector has been the most dynamical within spinning and weaving production, with growth rates of aproximately 17% and 13% respectively. It is also reflected in the increase of percent participation of synthetic and artificial sector in relation to total production of textile sector.

4. Demand.

It has been determined that the growth rate for spinnings was about 16.6% and for weavings about 11.5%, being the greatest within textile sector.

Among other factors, increase of demand depends mainly on increase of population and on purchasing power of it.

5. General appreciation

5.1 Textile industry in Peru, in regard to spinning and weaving activity, in 1979, used about 88% and 82% of its installed capacities respectively, these percentages have decreased about

10% in relation to 1979 because the country is passing a crisis.

5.2 Export of textile products to other countries must be foster in order to neutralize recessive effects on production due to the contraction of domestic market.