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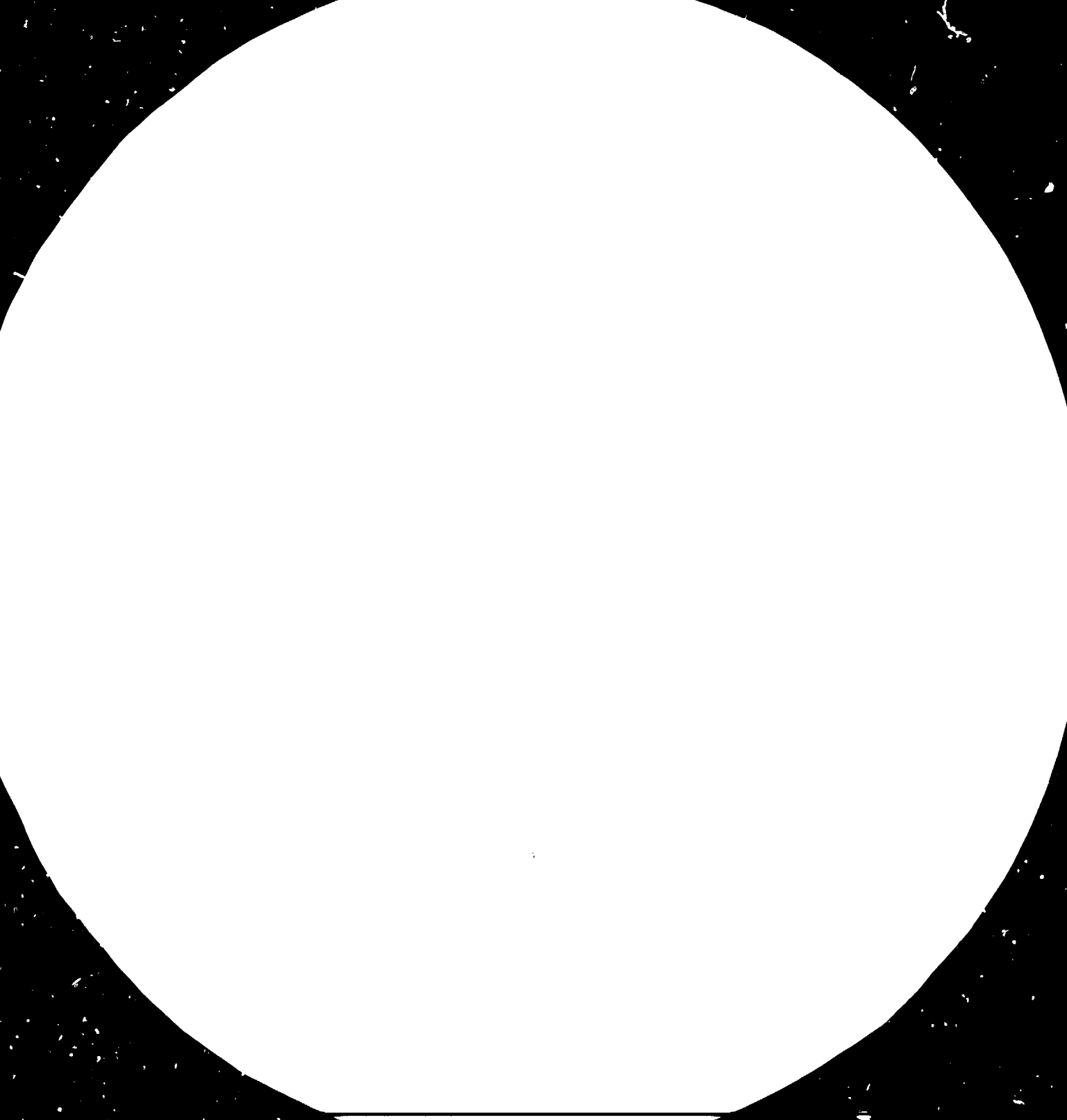
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**INDUSTRIAL DEVELOPMENT REVIEW  
SERIES**

**URUGUAY**

Prepared by the  
Regional and Country Studies Branch  
Division for Industrial Studies

2003

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## Preface

This industrial development review of Uruguay has been prepared by the Regional and Country Studies Branch of UNIDO's Division for Industrial Studies. The aims of the review are to present a general picture of the country's economic and industrial development and to provide the readers with additional information to be used in activities relating to technical assistance, industrial redeployment and restructuring, and investment promotion and cooperation.

A considerable portion of the data analyzed in the industrial development review has been provided by the Statistics and Survey Unit of UNIDO's Division for Industrial Studies. Industrial development reviews will be updated periodically as new data become available from UNIDO's Statistics data base and national information sources, and in response to comments received from the users of the reviews.

The views and comments contained in this study do not necessarily reflect those of the Government of Uruguay nor do they officially commit the United Nations Industrial Development Organization to any particular course of action.

Uruguay

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EXPLANATORY NOTE

The structure and organization of information in the report follows the established outline for Industrial Development Reviews. The heading on each page gives the date on which the information for that section was gathered and analyzed, and the page number within sections or sub-sections. Page 2.5.2, for example, identifies the second page of information on "Performance of the Manufacturing Sector", which is sub-section 2.5.

Regional classifications, industrial classifications, trade classifications and symbols used in the statistical tables of this report, unless otherwise indicated, follow those adopted in the United Nations Statistical Yearbook.

Dates divided by a hyphen (1970-71) indicate the full period, including the beginning and end year.

Dates divided by a slash (1970/71) indicate a crop year or a financial year.

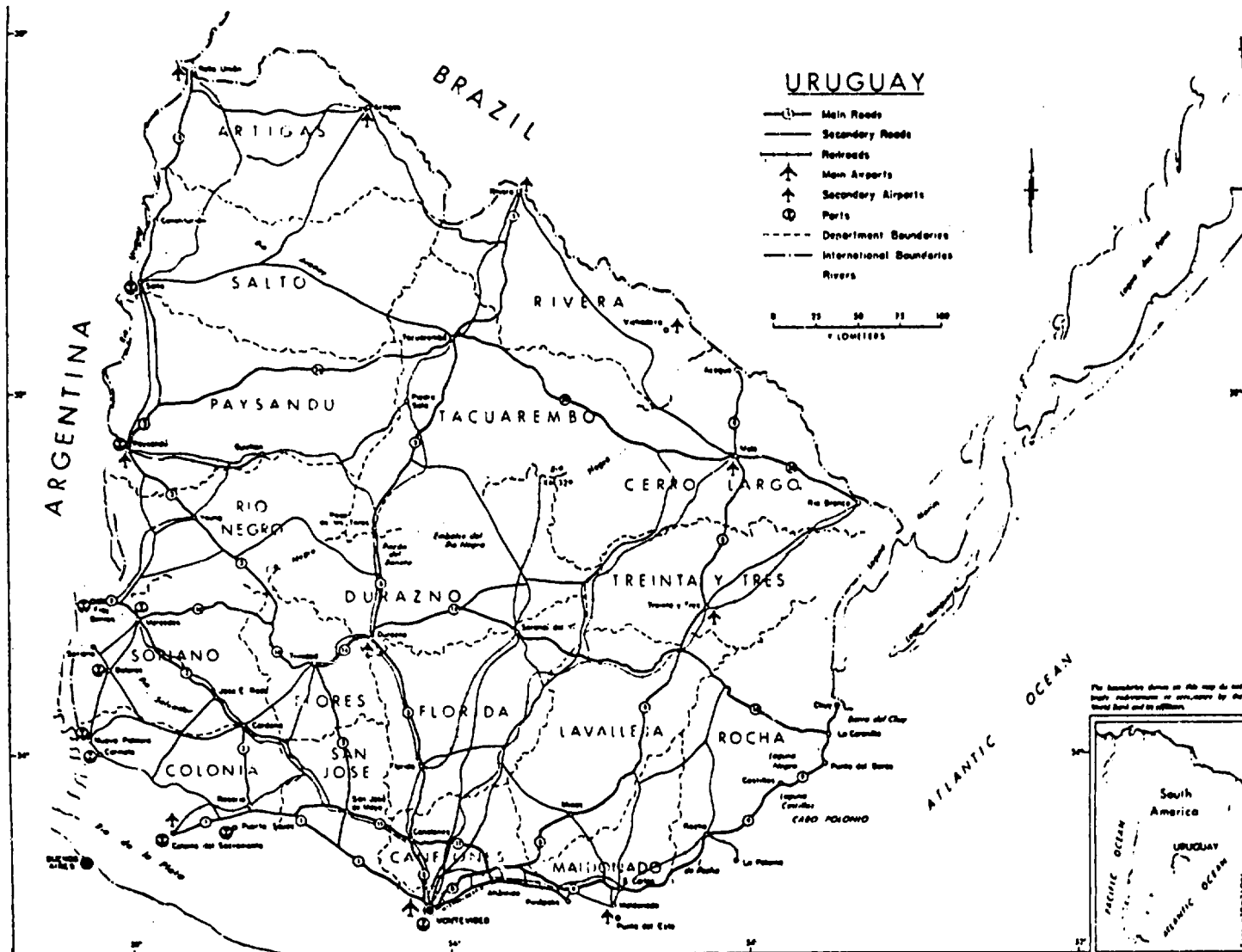
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Three dots (...) indicate that data are not available or are not separately reported;

A dash (-) indicates that the amount is nil or negligible;

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MAP OF URUGUAY

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## Uruguay 1.1.1

June 1983

### 1. OVERVIEW OF URUGUAY

#### 1.1 The Country and its People

The República Oriental del Uruguay is a country of 177,500 square kilometres located on the east coast of South America and borders Brazil and Argentina, the largest countries of the region. Uruguay, formerly a Spanish colony, obtained its independence in 1825. By 1980 it had nearly three million inhabitants, 45% of whom live in the capital city, Montevideo.

#### BASIC INDICATORS BOX No 1

##### Country Information

<u>In 1981</u>	
Area:	177.5 thousand Km <sup>2</sup>
Population:	number: 2.9 million
	density: 16.7 inhabitants per Km <sup>2</sup>
	growth rate: 0.4 percent, 1970-81
	labour force: 1.11 million
	adult literacy: 94 percent
	Infant mortality rate: 39 per 1000 live births
	life expectancy: 71 years
Currency exchange rate (June 1983):	1 US\$=32.3 Uruguayan Pesos

Sources: World Bank, World Development Report 1983; IMF, International Financial Statistics, October 1983.

The majority of the population enjoys a relatively high standard of living, particularly if compared with most of the other Latin American countries. Uruguay has experienced a very peculiar demographic evolution in comparison to other developing countries. Except for the first decades of the century, when the country received a significant number of immigrants from Europe, the total population has grown very slowly. In the period 1950-78, for example, the population growth rate was 1.3% per year. This low growth

Uruguay 1.1.2

June 1983

rate is due to two main factors: decreases in the birth rate, and a considerable emigration movement which began in 1963 and has reached a significant absolute volume in recent years.

The country is endowed with a relative abundance of land suitable for agriculture and cattle raising. The cultivation of wheat, maize, and rice, and the production of meat, wool and leather are among the most important economic activities. The country also has ocean resources, which have not yet been sufficiently exploited. Minerals and forests, however, are relatively scarce within Uruguay's territory.

BASIC INDICATORS BOX No 2

Resources and Transport Infrastructure

<u>Resources:</u>	
Principal cash crops:	Maize, soya beans, cotton, sweet potatoes, wheat, rice
Livestock (1982):	
Sheep:	21.0 million
Cattle:	11.6 million
Fisheries (1980):	120,000 tons
<u>Transport:</u>	
Roads:	5,000 Km. paved, 33,800 Km unpaved
Railways:	2,993 Km.
Ports:	Montevideo, Colonia, La Paloma
Airports:	Carrasco (International), Maldonado

Source: The Economist Intelligence Unit, Quarterly Economic Review of Uruguay, Annual Supplement 1983.

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June 1983

1.2 The Economy

BASIC INDICATORS BOX No 3

GNP, GDP and Structure of the Economy

<u>In 1981</u>		
Gross National Product	per capita:	US\$ 2,820
Gross Domestic Product	total:	US\$ 9,790 million
	growth rate:	3.9 per cent (annual average 1970-80*)
	structure:	agriculture: 8%
		industry: 33%
		(manufacturing: 26%)
		services: 59%

\* Constant 1970 prices.

Source: World Bank, World Development Report 1983.

The Uruguayan economy is based on the comparative advantage enjoyed in the production of certain agricultural goods. Although agriculture contributes only 8% of total GDP, its relative significance for overall development is much higher since it accounts for most of the country's exports. Uruguay has based its growth for decades on the export of such commodities as wool, leather and meat, mostly directed towards a few European countries.

In recent years some significant changes have occurred in Uruguay's economy. The manufacturing sector, whose role in the past was oriented exclusively towards satisfying local demand, has become much more export oriented. Production in some branches, like textiles, leather goods or clothing, has been boosted as manufacturers respond to external demand. Unfortunately, the manufacturing export drive has been considerably hampered in the first years of the present decade by the significant appreciation in the exchange rate.



## Uruguay 1.2.2

June 1983

Economic developments in Argentina and Brazil have affected the Uruguayan economy severely. Economic policies in Argentina have been particularly influential as they led to an exceptional increase of imports from Uruguay at the end of the seventies. Increased exports were coupled with an impressive growth of Argentina tourism, and in fact, receipts from tourism became the most important item in Uruguay's current accounts. Recent shifts in the economic policies of Argentina have likewise reverberated in Uruguay's economy.

### BASIC INDICATORS BOX NO 4

#### Foreign Trade and Balance of Payments

<u>In 1981</u>	
Exports total value:	US\$ 1,216 million
main goods:	meat, wool, rice, leather goods, textiles
main Destinations:	EEC, Brazil, Argentina
Imports total value:	US\$ 1,599 million
main Products:	oil, machinery, transport equipment
main Origins:	Brazil, EEC, U.S.A., Argentina
Balance of Payments (current accounts):	US\$ -474 million
External Debt:	US\$ 2,153 million
Debt Service:	
Percent of GNP:	3.3%
Percent of total exports:	23.0%
Foreign Currency Reserves:	US\$ 1,249.3 million
Inflation Rate:	77% Average annual 1973-1983

Source: Ministerio de Economía y Finanzas, Uruguay Económico, No 1, Montevideo 1982.

Uruguay 1.2.3  
June 1983

BASIC INDICATORS BOX 5  
Prices and Exchange Rates

<u>Year</u>	<u>Consumer Prices Index</u> (1980=100)	<u>Official Exchange Rate</u> (annual average)
1970		1US \$ = 0.25 - Uruguayan Pesos
1975		" 2.3
1976	16.0	" 3.4
1977	25.4	" 4.8
1978	36.7	" 6.1
1979	61.2	" 7.9
1980	100.0	" 9.2
1981	134.0	" 10.9
1982	159.5	" 14.8
1983*	220.0	" 31.2

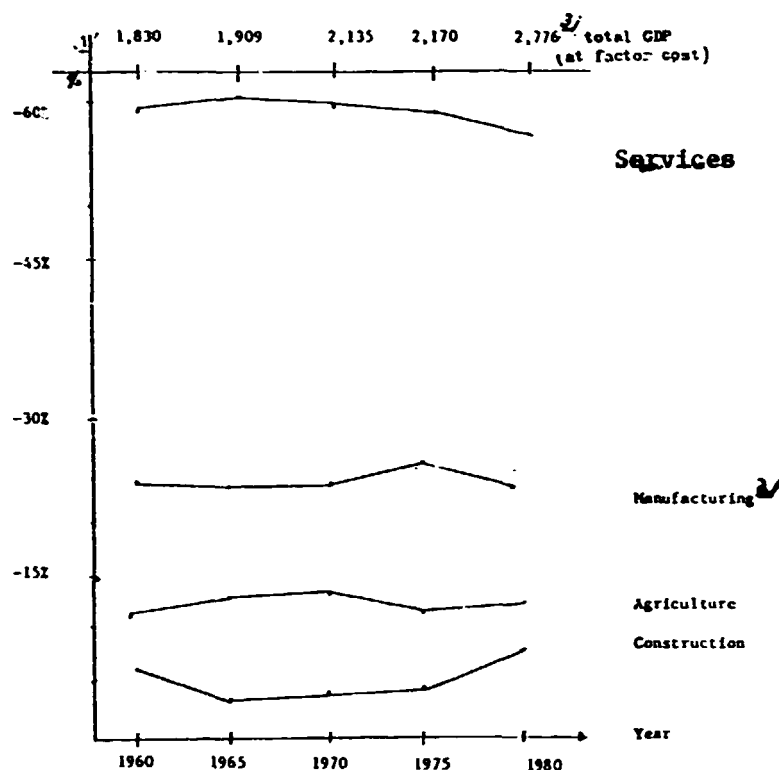
\* January-June

Sources: IMF, International Financial Statistics, Yearbook 1979, October 1983

Uruguay 1.2.4

June 1983

Figure 1: GDP by Economic Sectors, 1960-1980



Economic Sectors (in percent)	1960	1965	1970	1975	1980
Agriculture	11.0	12.3	12.6	11.5	12.0
Manufacturing <sup>2/</sup>	24.3	24.1	24.2	25.7	24.0
Construction	5.4	3.5	3.8	4.2	7.8
Services	59.3	60.1	59.4	58.6	56.2
	100%	100%	100%	100%	100%
Total GDP (at factor cost) <sup>1/</sup>	1830	1909	2315	2170	2776 <sup>3/</sup>

<sup>1/</sup> At constant 1975 prices, in millions US dollars.

<sup>2/</sup> Mining and quarrying included in Manufacturing

<sup>3/</sup> Estimates.

Source: ECLA, United Nations.

## Uruguay 1.3.1

June 1983

1.3 Manufacturing Sector

## BASIC INDICATORS BOX No 6

The Manufacturing Sector

Manufacturing Value Added (MVA):	US\$ 2,572 million (1981)
MVA per capita:	US\$ 887 (1981)
Manufacturing gross output 1981:	US\$ 6,021 million
1980:	US\$ 5,544 million
percentage exported 1980:	14.7 per cent
Employment in manufacturing	
Number:	154,140 (1981)
Percentage of labour force:	13.9%
MVA per employee:	US\$ 17,000 (1981)
Exports of Manufactures	
Value:	US\$ 817 million (1980)
Main goods:	meat, clothing, wool tops, leather manufactures
Destinations:	Argentina, Brazil, EEC, USA
Imports of Manufactures	
Value:	US\$ 1,130 million (1980)
Main goods:	machinery, transport equipment, iron and steel, chemical elements
Origins:	EEC, USA, Brazil, Argentina
Share of manufactures (1980)	
- in total exports:	7.7 per cent
- in total imports:	68.4 per cent

Source: Uruguay, Dirección General de Estadística y Censos; and UNIDO Data Base.

Unlike most Latin American countries, Uruguay's industrial sector experienced low growth rates from 1950 onwards. For the 1950-65 period the corresponding figure was 2.7% per year when the average for the region as a whole was 6.3%. The difference was even greater between 1965 and 1973, during which the country's manufacturing sector grew at only 0.9% while the regional average was 8.2%. A brief reversal of this trend occurred in the second half of the seventies, when a 5.4% rate was achieved (1977-80). Yet this performance has again been checked since 1981 by an acute recession.

Uruguay 1.3.2

June 1983

This poor record of development has been attributed to an excessive reliance on the import substitution model of industrialization. The basic difficulty, according to this interpretation, was that Uruguay's small internal market offered only very limited incentives to local import-replacing manufacturers. Import tariffs for a wide variety of products protected the industrial sector from external competition but provided no incentives to gain economies of scale through exporting. The industrial sector became dependent on the earnings of agricultural exports to pay for the imports of raw materials, spare parts and required equipment.

By the mid-seventies, the need for a significant change in industrial policy led the government to adopt a number of measures to promote the exports of manufactures. For a while these policies had some positive results, but the later shift in emphasis to other objectives, primarily that of controlling inflation, diluted their effectiveness. (See section 3 on Policies below).

2. STRUCTURE AND PERFORMANCE OF THE MANUFACTURING SECTOR

2.1 Growth and Structural Changes of Value Added in Manufacturing

Uruguay's manufacturing sector is largely dominated by production in the consumer goods branches, and particularly of those items which make use of agricultural products. This reflects the country's natural endowment and also the limits imposed on the industrial sector by the small size of the internal market. The country has also developed some branches of intermediate products, such as chemicals and petroleum refineries. The capital goods industry contributes only a small part of total manufacturing value added.

Industrial performance has varied significantly in the 1971-82 period. Electrical machinery experienced the highest growth rate, followed by leather goods, while beverages and petroleum products reduced their absolute output (Table 1). The noticeable year to year variations in the data for several branches reveal the nature of recent developments in the industrial sector. Textiles, wearing apparel and leather goods, for example, have gone through severe "stop and go" cycles, and similar trends are apparent in various capital goods branches. This behaviour is particularly significant since the data from which Table 1 is derived correspond to physical output, and thus these variations are not the result of changes in the value of production.

Table 2 offers information with respect to the relative shares of the different branches. The most important branches in 1981 in terms of value added were food products and petroleum refineries. Also of significance were other consumer goods industries such as leverages and textiles. In the capital goods category transport equipment was the single most important branch.

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Some branches of manufacturing in Uruguay are important in terms of their export potentials. The food industry, for example, accounted for 30% of all non-traditional exports in 1979. In recent years this branch has substantially diversified the variety of goods sold abroad. Similarly, the leather goods industry has also increased its contribution to total exports. This performance has been the result of cheap access to the basic raw materials and of economic policies aimed at promoting the sector's development. The textile and clothing industries have also been important in Uruguay's export performance, due in part to the high quality of the country's wool production.

Table 1: Annual Growth Rates of Volume Indices of Industrial Production, 1971-1982. (percentages)<sup>a</sup>

ISIC	ISIC - DESCRIPTION	1971-72	1972-73	1973-74	1974-75	1975-76	1976-77	1977-78	1978-79	1979-80	1980-81	1981-82	$\bar{x}$
310/3120	Food Products	4,3	4,3	1,9	4,9	3,2	0,0	-0,1	1,1	8,0	7,9	-1,5	2,8
3130	Beverages	-3,4	-11,9	-3,8	2,8	-11,6	2,4	4,9	14,5	0,9	7,6	-16,7	-0,1
3140	Tobacco	-1,4	-1,6	1,9	6,7	5,6	-2,7	1,5	18,1	-0,2	9,2	-7,3	3,6
3210	Textiles <sup>1/</sup>	13,9	-9,2	1,9	12,9	-1,4	12,1	6,7	16,8	1,4	-10,1	-41,4	2,5
3220	Wearing apparel, incl. footwear <sup>2/</sup>	9,4	-5,2	15,5	16,4	12,4	11,9	10,7	-8,1	-1,3	-10,9	-34,7	0,4
3230	Leather Products	1,7	10,2	9,0	41,1	35,4	13,0	-0,1	-27,8	20,5	-3,9	-2,4	5,6
3240	Footwear, exc. rubber of plastic <sup>3/</sup>												
3250	Wood products, exc. furniture <sup>2/</sup>												
3260	Furniture, exc. metal <sup>2/</sup>												
3310	Paper and Products	-1,1	16,3	0,0	-10,3	6,1	13,8	22,8	14,6	3,4	-12,9	-18,8	4,1
3420	Printing and Publishing	0,1	14,9	-10,7	-1,0	0,5	19,8	4,0	12,5	8,6	3,4	-15,0	4,3
3510	Industrial (chemicals)												
3520	Other Chemicals	-7,8	4,5	13,5	-12,6	1,3	4,9	13,4	27,3	-14,2	-3,3	-17,2	3,0
3530	Petroleum Refineries												
3540	Non-petroleum and coal <sup>2/</sup>	-0,2	-0,7	1,0	8,2	-4,3	-3,3	6,6	-4,3	-1,4	-5,8	0,5	-0,3
3550	Rubber Products	12,5	7,9	19,9	5,3	-18,1	20,9	11,1	9,3	2,7	-21,3	-55,4	1,5
3560	Plastic Products <sup>2/</sup>												
3610	Pottery, China, Earthenware												
3620	Glass and Products	1,3	1,3	6,8	1,5	0,3	12,7	2,8	15,5	1,4	-10,8	-28,9	2,2
3680	Other non met. mineral products)												
3710	Iron and Steel <sup>2/</sup>												
3720	Non-ferrous metals <sup>2/</sup>												
3810	Fabricated Metal Products <sup>2/</sup>	-3,7	9,6	-22,8	-2,6	13,3	15,7	0,8	26,2	-7,6	-13,4	-23,3	1,0
3920	Machinery, exc. electrical <sup>2/</sup>												
3930	Machinery Electric	-8,1	-9,3	-2,8	5,4	16,2	20,1	-0,7	36,0	35,8	-4,3	-30,9	8,9
3940	Transport Equipment	0,6	-9,1	-3,0	2,4	1,8	2,2	26,1	26,2	9,4	-21,7	-37,7	2,8
3950	Professional and Scientific Equip.												
3960	Other manufactured products	1,4	-0,9	2,1	6,3	2,6	5,5	5,7	36,2	-10,7	-20,3	-18,0	5,3
3000	TOTAL MANUFACTURING	2,1	-0,06	2,5	5,6	0,2	6,3	5,8	7,1	2,4	-4,6	-17,1	

Uruguay 2.1.3  
June 1983

Sources:

Based on index of physical volume, the only information available in constant terms - prepared quarterly by the Central Bank of Uruguay on Banco Central del Uruguay. <sup>a</sup> Decimals shown by commas

1/ Excluded 3212

2/ Included 3240 and 3212

3/ Excluded 3812

4/ Not available.



Table 2. Structural Changes of Value Added in Manufacturing, 1970-1981. <sup>a</sup>

(Sectoral Shares (percentages) on the Basis of Values in National Currency at Current Prices).

ISIC	ISIC - DESCRIPTION	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
3110/3120	Food Products	15,1	14,6	19,6	21,6	17,6	18,3	18,9	20,0	16,5	11,7	12,8	18,6
3130	Beverages	9,6	9,7	9,9	8,1	9,2	8,3	6,6	7,5	6,8	8,4	8,1	9,6
3140	Tobacco	5,3	5,9	5,4	5,7	5,7	5,6	5,9	5,8	4,0	4,9	7,0	6,0
3210	Textiles	14,6	13,0	13,6	10,5	11,3	12,9	13,4	10,0	9,3	10,0	8,5	8,5
3220	Wearing apparel, exc footwear	3,5	6,5 <sup>A/</sup>	6,6 <sup>A/</sup>	5,6 <sup>A/</sup>	5,9 <sup>A/</sup>	6,0 <sup>A/</sup>	4,5	9,5 <sup>A/</sup>	4,7	5,1	4,6	2,7
3230	Leather Products	2,8	1,6	2,1	2,8	3,6	3,9	5,4	10,2	3,5	2,5	2,4	2,4
3240	Footwear, exc rubber or plastic	1,6						1,6		1,5	1,4	1,4	0,9
3310	Wood Products, exc furniture	0,8	0,5	0,9	0,8	0,8	0,5	0,5	0,6	1,2	1,8 <sup>G/</sup>	1,6 <sup>G/</sup>	1,3
3320	Furniture, exc metal	0,4	1,1	0,9	0,6	0,9	0,6	0,5	3,6	0,7			0,3
3410	Paper and Products	1,7	2,2	1,5	1,7	2,4	2,5	1,7	1,6	1,6	2,0	2,3	2,0
3420	Printing and Publishing	2,0	2,7	2,4	2,1	2,2	2,2	2,1	2,1	2,6	2,5	2,9	0,8
3510	Industrial Chemicals	0,9	5,9 <sup>B/</sup>	6,3 <sup>B/</sup>	5,3 <sup>B/</sup>	8,3 <sup>B/</sup>	7,1 <sup>B/</sup>	1,0	5,8 <sup>B/</sup>	1,8	2,1	1,6	2,7
3520	Other Chemicals	4,3						4,1		6,1	6,5	5,8	6,1
3530	Petroleum Refineries	12,6	10,8 <sup>C/</sup>	9,0 <sup>C/</sup>	76,4 <sup>C/</sup>	12,9 <sup>C/</sup>	14,6 <sup>C/</sup>	14,2	5,3 <sup>C/</sup>	15,4	13,3	15,1	15,6
3540	Misc. Petroleum and coal products	0,1						0,1		0,1	n/e	n/e	0,1
3550	Rubber Products	3,4	3,2	2,4	2,4	2,4	2,6	2,4	1,2	2,6	3,1	3,1	1,6
3560	Plastic Products	3,3						0,8		2,4	2,6	1,8	1,7
3610	Pottery, China, Earthenware	0,5	3,8 <sup>D/</sup>	3,6 <sup>D/</sup>	3,2 <sup>D/</sup>	3,5 <sup>D/</sup>	3,2 <sup>D/</sup>	0,5	4,8 <sup>L/</sup>	0,7	1,0	1,0	1,0
3620	Glass and Products	1,3						1,3		1,0	1,0	1,1	0,9
3690	Other non met. mineral products	2,4						2,1		2,2	2,7	3,2	3,2
3710	Iron and Steel	0,4	0,5 <sup>E/</sup>	0,6 <sup>E/</sup>	1,1 <sup>E/</sup>	0,8 <sup>E/</sup>	0,7 <sup>E/</sup>	0,5	0,6 <sup>E/</sup>	0,7	1,0	0,7	0,6
3720	Non-ferrous metals	0,1						0,1		0,3	0,3	0,2	0,2
3810	Fabricated metal products	3,0	3,2	4,2	3,4	3,9	2,8	2,9	3,3	3,8	6,6 <sup>H/</sup>	5,4 <sup>H/</sup>	3,9
3820	Machinery, exc. electrical	1,2	1,1	1,8	1,3	1,5	1,4	1,0	1,6	1,8			1,3
3830	Machinery electric	2,6	3,2	2,7	2,2	2,4	2,6	2,4	3,3	3,3	2,7	2,6	3,3
3840	Transport equipment	5,6	6,5	4,5	3,6	3,2	2,5	4,4	4,0	4,5	6,1	6,1	4,3
3850	Professional and Scientific Equip.		3,8 <sup>F/</sup>	1,8 <sup>F/</sup>	1,5 <sup>F/</sup>	1,6 <sup>F/</sup>	1,7 <sup>F/</sup>	...	2,3 <sup>F/</sup>	0,1			
3900	Other manufactured products	0,9						1,1		0,8	0,7	0,7	0,4
	TOTAL MANUFACTURING	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0
	TOTAL MANUF. IN MILLIONS	159	185	332	714	1271	2434	3782	5753	9125	13246	19846	

Source: For 1971-75 and 1977: UNIDO Data Base  
 For 1970, 1976 and 1979-81: Direcc. General de Estadística y Censos, Encuesta Anual de Producción Años 1980 y 1981,  
 For 1978: Industrial Census (See Table 3)

FOOTNOTES

A/ 3220 3240      F/ 3850 3900 3560  
 B/ 3510 3520      G/ 3310 3320  
 C/ 3530 3540      H/ 3810 3820  
 D/ 3610 3620 3690  
 E/ 3710 3720

\* Decimals shown by commas.

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2.2 Geographical Distribution of Manufacturing Industries

According to the industrial census for 1978, most of the manufacturing activities of Uruguay are concentrated in the Montevideo region. This area accounts for 78.4% of the total gross output of the sector, 83.7% of the total value added, 77.4% of all the employment generated by industrial production and 64.2% of all manufacturing establishments (Table 3). The dominant position of the Montevideo region in all of these indicators underscores the fact that it hosts a wide range of industries and firms. As Table 3 shows, the Montevideo area has a relatively larger share of total value added than of total number of establishments. In contrast, Canelones, the second region of industrial importance, accounts for 10% of all establishments but contributes 6% of total value added, suggesting that the average size of firms in this department tends to be relatively smaller than in Montevideo.

The strong concentration of industrial activity in Montevideo explains the emphasis, in most development plans and policies pursued thus far by the government, on the promotion of industry in areas of the country outside of its main city and capital.

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Table 3. Regional Shares in Manufacturing Gross Output, Value Added, Employment and Establishments, 1978 (in percent)

Region	Shares in Total Manufacturing Gross Output	Shares in Total Manufacturing Value Added	Shares in Total Manufacturing Employment	Shares in Total Number of Establishments
	1978	1978	1978	1978
Montevideo	78.4	83.7	77.4	64.2
Artigas	0.8	0.6	0.6	0.8
Canelones	7.3	5.0	7.2	10.2
Cerro Largo	0.2	0.2	0.5	0.9
Colonia	2.4	1.7	2.9	4.6
Durazno	0.3	0.2	0.4	0.5
Flores	0.1	0.1	0.2	0.4
Florida	0.7	0.5	0.9	2.0
Lavalleja	1.0	0.9	0.8	0.9
Maldonado	0.8	0.7	1.0	2.6
Paysandú	2.9	1.9	2.7	2.5
Rio Negro	0.5	0.3	0.7	0.8
Rivera	0.1	0.1	0.3	0.9
Rocha	0.8	0.5	0.5	1.1
Salto	0.9	0.6	1.1	1.9
San José	1.1	1.0	1.0	2.1
Serrano	0.7	0.6	0.9	2.1
Tacurembó	0.7	0.3	0.7	0.8
Treintay Tres	0.3	0.1	0.2	0.7
TOTAL	100.0	100.0	100.0	100.0

Source: Dirección General de Estadística y Censos, II Censo Económico Nacional, Sector Industria Manufacturera, 1978.  
Montevideo, June 1983.

2.3 Manufacturing Activity by Size of Enterprises

The majority of industrial establishments in Uruguay are small in size. According to the results of the latest industrial census (1978), 76.2% of all manufacturing enterprises employed fewer than 10 persons, and 93,8% employed fewer than 50. As usual, this employment distribution does not correlate to the distribution of value added among enterprises. In fact, as Table 4 shows, establishments with more than 100 employees accounted for 61.5% of all value added generated by the industrial sector. The distribution is less skewed in terms of total employment in manufacturing, although one third of the total 182,480 persons employed in manufacturing in Uruguay in 1978 worked in establishments with between 100 and 499 employees.

The Table also reveals that the average labour productivity (measured by value added per employee) is positively correlated with the size of firms: the smaller the establishment, the smaller the value added per employee. This relationship is particularly clear for firms with fewer than 10 employees and for those with more than 500 employees (US\$ 4.6 and 12.6 thousand respectively). The other categories do not show great variations in respect to value added per employee.

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Table 4. Establishments, Manufacturing Value Added, Employment, and Value Added per Employee, by Size of Enterprises, 1978.

Size in terms of numbers employed	Percentage of Total manufacturing establishments	Percentage of Total manufacturing value added	Percentage of Total manufacturing employment	Value Added per employee <u>a/</u>
	1978	1978	1978	1978
0 - 9	76.2	8.1	14.6	4.6
10 - 49	17.6	18.2	21.9	6.9
50 - 99	3.3	12.2	13.9	7.3
100 - 499	2.5	32.4	30.3	8.9
More than 500	0.4	29.1	19.3	12.6
<b>TOTAL MANUFACTURING</b>	100.0	100.0	100.0	8.3

a/ In thousands US\$

Source: Dirección General de Estadística y Censo, II Censo Económico Nacional, Sector Industria y Manufacturera, 1978.  
Montevideo, June 1983.

## 2.4 Ownership and Investment Patterns in Manufacturing

### A State Participation in Industry

Although its share in GNP has decreased from 21.5% in 1973-1975 to 16.7% in 1979, the public sector plays an increasingly important role in the process of fixed capital formation in Uruguay. It accounted for 26% of domestic investment in 1972-1975 and for 45% in 1976-1979\*.

The State has legal or de facto monopolies in various sectors: railroads, airlines, telecommunications, electricity, refining of crude petroleum, fishing of seals. Although the bulk of state participation is concentrated in public services, there are a few important government-owned industries. The largest is ANCAP, which besides refining petroleum, produces cement and alcoholic drinks. Another important state-owned industrial concern is ICPE, which produces and markets seal products. The State also participates in CONAPROLE, a national cooperative of milk producers, and until 1978 operated a meat packing plant which was then sold to private investors.

Since 1975, the government has acted on its intention to reduce its participation in the economy through the sale of, or decreased participation in, public enterprises. Yet some recent efforts to transfer several industrial plants to the private sector have failed. In fact, despite the declared policy of encouraging the private sector (see section 3.1 below) the state has retained its major positions in the productive and service sectors, and furthermore has increased public investment in several fields, such as transport infrastructure, generation of electricity, production of cement, etc.\*\*

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\* Banco Central del Uruguay. "Producto e Ingreso Nacionales", 1980

\*\* See Luis Macadar, "Uruguay 1974-1980: Un nuevo ensayo de readjuste económico?", Estudios CINVE, Montevideo 1982.

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**B Foreign Investments**

According to a recent survey in 1978\* there were 71 manufacturing enterprises in Uruguay with foreign capital, 45 of them in the chemical industry, and 20 in the food sector. Other sectors with significant foreign participation include textiles, beverages, metals products and transport equipment. The shares of foreign enterprises in some macroeconomic indicators are given below for 1978:

Gross Output.....:	13.8%
Gross Manufacturing Product....:	17.4%
Gross Domestic Product.....:	5.2%
Industrial Employment.....:	7.1%

The sectors with the highest degree of foreign participation are chemicals (52% of gross value of production); transport materials (43.5%); basic metals (36.2%) and beverages (28.4%). Between 1968 and 1978 the output of foreign enterprises has been growing at a faster rate (at 64%) than that of the country's industrial sector at large (39%).

About 90% of these enterprises are majority foreign-owned, and 65% are wholly so. Total foreign investment in industry in Uruguay is estimated at about US\$ 750 million. Nearly half of these investments come from the U.S. Argentina and Brazil rank among the other main origins of foreign capital.

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\* See INTAL, "La empresa manufacturera extranjera en Uruguay: aspectos cuantitativos", 1980.

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## 2.5 Performance of the Manufacturing Sector

The manufacturing sector of Uruguay has experienced a significant slowdown in the beginning of the eighties, which can be seen in the sharp drop in total industrial employment that occurred from 1978 to 1981. As shown in Table 5, 182,480 persons were employed in 1978 and 154,140 in 1981. A comparison of employment in these two years with gross output, value added or wages and salaries paid, provides some interesting observations (Table 7).<sup>\*/</sup>

The share of wages and salaries increased to 32% of total value added in 1981, compared to 23.3% in 1978. This development might at first seem puzzling, since total employment decreased substantially. In part this result can be explained by the fall in total value added (in constant terms) and by the significant increase in real wages over the three year period. The share of wages in value added varied from 71.5% in the iron and steel industry to 4.1% for petroleum refineries in 1981. The difference is explained, among other factors, by the difference between the prices of basic inputs relative to the prices of finished products within each industry.

The first two columns in Table 7 show the value added by employee in current dollar terms. They indicate a 100% increase for total manufacturing activities from 1978 to 1981. Some branches show very high value added per employee. In the case of petroleum refineries this is caused by the very high capital intensity of the industry. In tobacco the ratio is influenced by the incidence of indirect taxes in total value added at market prices.

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<sup>\*/</sup> See Table 5 for sources. The fact that the data originates in different sources must be taken into account in comparisons between the two years. Value added was calculated at market prices and includes wages and salaries paid to employees, utilization of fixed capital, indirect taxes (less subsidies) and the exploitation surplus.



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The ratio of value added to gross output increased slightly in this three year period for the manufacturing sector as a whole. At the branch level, some changes can be observed: a decrease in the printing and publishing, furniture, and chemicals sectors; and large increases in leather goods, non-electrical machinery, and glass and other non-metal products sectors.

Table 3: Gross Output, Value Added, Wages and Salaries, Employment and Establishments  
 Values in millions Uruguayan pesos (current prices), 1978 and 1981

ISIC	ISIC - DESCRIPTION	Gross Output		Value Added		Wages and Salaries		Employment		No of Establishments*
		1978	1981	1978	1981	1978	1981	1978	1981	1978
110/3120	Food Products	5636	18081	1540	5218	459	1959	42899	36580	2269
3130	Beverages	1183	4630	639	2682	125	491	7649	6520	513
3140	Tobacco	489	2177	372	1698	19	111	686	897	10
3210	Textiles	1924	4994	871	2369	259	394	21614	19442	523
3220	Wearing apparel, exc. footwear	1283	2523	416	765	158	495	17652	11925	987
3230	Leather Products	1179	1764	325	668	112	365	9989	7680	224
3240	Footwear, exc. rubber or plastic	386	704	144	262	65	158	7548	4564	261
3310	Wood Products, exc furniture	261	700	115	356	32	171	4573	3300	578
3320	Furniture, exc. Metal	122	252	62	97	13	56	2974	1237	950
3410	Paper and Products	349	1268	151	565	48	228	3508	3504	75
3420	Printing and Publishing	445	1036	243	217	71	359	5565	5666	433
3510	Industrial Chemicals	507	1548	173	751	41	191	2159	2077	96
3520	Other Chemicals	1169	3421	568	1712	163	683	7306	7216	284
3530	Petroleum Refineries	2731	9882	1440	4375	37	177	1784	2225	11
3540	Misc. Petroleum and Coal Products	20	95	9	43	3	24	160	205	13
3550	Rubber Products	509	922	242	449	57	271	3803	3127	241
3560	Plastic Products	407	1043	222	464	40	212	4142	3678	225
3610	Pottery, China, Earthenware	112	407	66	271	22	103	1885	1981	65
3620	Glass and Products	189	528	93	262	28	120	2121	1906	57
3690	Other non met. mineral products	461	1628	203	913	65	311	4562	4460	319
3710	Iron and Steel	190	417	69	165	25	118	2043	2227	35
3720	Non-ferrous metals	57	106	25	46	6	26	549	506	33
3510	Fabricated metal products	684	1919	357	1088	97	471	8995	7875	1032
3820	Machinery, exc. electrical	288	532	168	362	37	145	3395	2080	619
3830	Machinery electric	618	1850	309	912	75	360	6120	5580	361
3840	Transport equipment	966	2952	421	1199	92	502	5967	6324	191
3350	Professional and Scientific equip.	22	...	10	...	3	...	395	...	36
3900	Other manufactured products	136	253	72	102	17	64	2437	1358	309
3000	TOTAL MANUFACTURING	22323	65,632	9,325	27,964	2,169	9,065	182480	154,140	10,750

Source: For 1978 same as Table 3  
 For 1981, Dirección General de Estadística y Censos, Encuesta Anual de Actividad Económica - Industrias Manufactureras  
 Año 1981, Montevideo Dec 1982. \* Data available for single year only.

Table 6: Gross Output, Value Added, Wages and Salaries, Employment, and Establishments\*  
Branch Shares (in per cent) in total manufacturing, 1978 and 1981

ISIC	ISIC-DESCRIPTION	Gross Output		Value Added		Wages and Salaries		Employment		No of establishments**
		1978	1981	1978	1981	1978	1981	1978	1981	1978
3110/3120	Food Products	25,2	27,55	16,5	18,60	21,1	21,61	23,5	23,72	21,1
3130	Beverages	5,3	7,05	6,8	9,59	5,8	5,42	4,2	4,23	4,8
3140	Tobacco	2,2	3,32	4,0	6,07	0,9	1,22	0,4	0,58	0,1
3210	Textiles	8,6	7,61	9,3	8,47	11,9	9,86	11,8	12,61	4,9
3220	Wearing apparel, exc. footwear	5,7	3,85	4,7	2,73	7,3	5,46	9,7	7,74	9,2
3230	Leather Products	5,3	2,69	3,5	2,39	5,2	4,03	5,5	4,98	2,1
3240	Footwear, exc. rubber or plastic	1,7	1,07	1,5	0,93	3,0	1,74	4,1	2,96	2,4
3310	Wood products, exc. furniture	1,2	1,07	1,2	1,27	1,5	1,88	2,5	2,14	5,4
3320	Furniture, exc. metal	0,5	0,38	0,7	0,34	0,6	0,62	1,6	0,80	8,8
3410	Paper and products	1,6	1,93	1,6	2,02	2,2	2,52	1,9	2,27	0,7
3420	Printing and Publishing	2,0	1,58	2,6	0,77	3,3	3,96	3,0	3,68	4,0
3510	Industrial Chemicals	2,3	2,36	1,8	2,68	1,9	2,11	1,2	1,35	0,9
3520	Other Chemicals	5,2	5,21	6,1	6,12	7,5	7,53	4,0	4,66	2,6
3530	Petroleum Refineries	12,2	15,06	15,4	15,64	1,7	1,95	1,0	1,44	0,1
3540	Misc. Petroleum and Coal Products	0,1	0,14	0,1	0,15	0,1	0,27	0,1	0,13	0,1
3550	Rubber Products	2,3	1,41	2,6	1,60	2,6	2,99	2,1	2,03	2,2
3560	Plastic Products	1,8	1,59	2,4	1,65	1,8	2,34	2,3	2,39	2,1
3610	Pottery, China, Earthenware	0,5	0,62	0,7	0,96	1,0	1,13	1,0	1,29	0,6
3620	Glass and Products	0,8	0,80	1,0	0,93	1,3	1,32	1,2	1,24	0,5
3690	Other non met. mineral products	2,1	2,48	2,2	3,26	3,0	3,43	2,5	2,89	3,0
3710	Iron and Steel	0,9	0,64	0,7	0,59	1,2	1,30	1,1	1,45	0,3
3720	Non-ferrous metals	0,3	0,16	0,3	0,16	0,3	0,29	0,3	0,33	0,3
3810	Fabricated metal products	3,1	2,92	2,8	1,89	4,5	5,20	4,9	5,11	9,6
3820	Machinery, exc. electrical	1,3	0,81	1,8	1,29	1,7	1,60	1,9	1,35	5,8
3830	Machinery electric	2,8	2,82	3,3	3,26	2,5	3,97	3,4	3,62	3,4
3340	Transport equipment	4,3	4,50	4,5	4,28	4,2	5,54	3,3	4,10	1,8
3850	Professional and Scientific equip.	0,1	0,12	0,1	..	0,1	0,09	0,2	0,02	0,3
3900	Other manufactured products	0,6	0,26	0,8	0,36	0,8	0,62	1,3	0,86	2,9
3000	TOTAL MANUFACTURING	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0

Source: Same as Table 5

\* Decimals shown by commas, data not available for fixed capital formation.  
\*\* Data available for single year only.

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Table 7: Performance of Manufacturing Sector by Branches, 1978 and 1981<sup>1/</sup>.

ISIC	ISIC-DESCRIPTION	Value Added <sup>1/</sup> per employee		Value Added per establish- ment <sup>1/</sup>	Share of Wages and Salaries in Value Added <sup>2/</sup>		Share of Value Added in Gross Output <sup>2/</sup>	
		1978	1981		1978**	1981	1978	1981
3110/3120	Food products	5,9	13,0	110,8	29,8	37,5	27,3	28,9
3130	Beverages	13,6	38,0	203,3	19,6	18,3	54,0	57,9
3140	Tobacco	88,5	174,0	6073,4	5,1	6,5	76,1	78,0
3210	Textiles	6,6	11,0	271,9	29,7	37,7	45,2	47,4
3220	Wearing apparel, exc footwear	3,8	6,0	68,8	38,0	64,7	32,4	30,3
3230	Leather products	5,3	8,0	236,9	34,5	54,6	27,6	37,9
3210	Footwear, exc rubber or plastic	3,1	5,0	90,1	45,1	60,3	37,3	37,2
3310	Wood products, exc furniture	4,1	10,0	32,5	27,8	48,0	44,1	50,9
3320	Furniture, exc metal	3,4	7,0	10,7	30,0	57,7	50,8	38,5
3410	Paper and products	7,0	15,0	328,7	31,8	40,4	43,3	44,6
3420	Printing and Publishing	7,1	4,0	91,6	29,2	...	54,6	20,9
3510	Industrial Chemicals	13,1	33,0	294,2	23,7	25,4	34,1	48,5
3520	Other Chemicals	12,7	22,0	326,5	28,7	39,9	48,6	50,0
3530	Petroleum Refineries	131,7	181,0	21372,9	2,6	4,1	52,7	44,2
3540	Misc. Petroleum and Coal Products	9,2	19,0	113,0	33,3	55,8	45,0	45,3
3550	Rubber products	10,4	13,0	163,9	23,6	60,4	47,5	48,7
3560	Plastic products	8,8	12,0	161,1	16,0	45,7	54,5	44,5
3610	Pottery, china, earthenware	5,7	13,0	165,7	33,3	36,0	58,9	66,6
3620	Glass and products	40,6	13,0	1512,2	20,1	45,0	49,2	49,6
3670	Other non met. mineral products	7,3	19,0	103,8	32,0	34,1	44,0	56,1
3710	Iron and steel	5,5	7,0	321,8	36,2	71,5	36,3	39,6
3720	Non-ferrous metals	7,4	8,0	123,7	24,0	56,5	43,9	43,4
3810	Fabricated Metal products	6,5	13,0	56,5	27,2	43,3	52,1	56,7
3820	Machinery, exc electrical	8,1	16,0	44,3	22,0	40,1	58,3	68,0
3830	Machinery electric	8,2	15,0	139,8	24,3	39,5	50,0	49,3
3840	Transport equipment	11,5	17,0	359,8	21,9	41,9	43,6	40,6
3850	Professional and scientific equip.	4,1	...	45,4	30,0	...	45,4	...
3900	Other manufactured products	4,8	7,0	38,0	23,6	54,9	52,9	58,3
3000	TOTAL MANUFACTURING	8,3	17,0	141,6	23,3	32,4	41,7	42,6

SOURCE: Same as Table 5  
<sup>1/</sup> Decimal shown by commas  
<sup>2/</sup> Data available for single year only

<sup>1/</sup> in thousands US\$ current- based on mid-year exchange rates.  
<sup>2/</sup> in percent.

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2.6 Structure and Development of Exports and Imports of Manufactured Goods.

Exports of manufactures accounted for approximately 80% of Uruguay's total exports in 1980 (See Table 8). The most important items were meat and meat preparations, clothing, wool tops, leather goods, and glazed or polished rice. Compared with ten years earlier, some significant changes have occurred in the composition of the country's manufacturing exports. Some goods, particularly meat and meat preparations, and textile products have experienced a noticeable drop in their relative importance. Meat was one of the few "staple" commodities sold abroad by Uruguay for many years. The protectionist measures imposed by traditional importers of these goods and a fall in the real exchange rate contributed to its reduced share of exports. In the case of textiles exports, similar causes were partially responsible for a decline but a rise in the local price of wool was also important. Exports of other items increased immensely, such as clothing whose exports boomed during the seventies from one million dollars in 1970 to more than 120 million in 1980. These developments are the result of policies implemented during the period aimed at promoting exports with a higher content of local value added (see also Table 11). Leather goods exports also grew rapidly during the first half of the seventies, but stagnated thereafter.

As in most developing countries, imports of capital goods have an important share of total imports. In 1980, 44% of all imports were machinery and transport equipment, the largest single import sector. Intermediate goods such as chemical components, plastics and petroleum also had a significant position in the country's imports. Table 8 indicates that no changes of magnitude occurred in the composition of imports of manufactures, as was the case in exports, although total imports of manufactures increased six-fold in current dollar terms from 1970 to 1980.

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The largest share of total exports is sold to other developing countries (Table 10). The destination of such goods as glazed rice, textiles, chemicals and machinery is predominantly developing countries, particularly Brazil and Argentina. On the other hand, wool tops, meat and a variety of miscellaneous manufactured articles are sold to developed market economies. As a general trend exports to neighbour countries have increased during the seventies, in part due to the special tariff provisions accorded by Uruguay with Argentina and Brazil.

Developed market economies as a whole are the primary source of manufactured imports, particularly if a restricted definition of manufacture is used. However, as shown in Table 9, the share of imports with a high level of manufacturing originating in developing countries is by no means small. In fact, 30% of all machinery imports and 48% of imports of transport equipment in 1980 originated in developing countries.

TABLE 6. PRODUCT MIX OF TRADE MANUFACTURED GOODS, 1970, 1975, 1980

SITC DESCRIPTION OF TRADE GOODS	E X P O R T S				I M P O R T S			
	1970	1975	1980	1980	1970	1975	1980	1980
	PERCENT IN TOTAL MANUFACTURES	PERCENT IN TOTAL MANUFACTURES	PERCENT IN TOTAL MANUFACTURES	(1000 US \$)	PERCENT IN TOTAL MANUFACTURES	PERCENT IN TOTAL MANUFACTURES	PERCENT IN TOTAL MANUFACTURES	(1000 US \$)
01 Meat and meat preparations	59.090	32.735	22.937	187452	0.031	0.000	0.138	1560
02 Dairy products and eggs	0.668	0.837	2.043	16701	0.040	0.232	0.059	1113
032 Fish n.e.s. and fish preparations	0.007	0.039	0.003	22	0.001	0.012	0.369	4392
0422 Rice, glazed or polished not otherwise worked	0.813	0.154	6.174	50466	...	...	...	...
046 Meal and flour of wheat or of meslin	...	...	0.007	57	...	...	...	...
047 Meal and flour of cereals, except above	1.506	...	...	...	...	...	...	...
048 Cereals preparat. & starch of fruits & vegetab.	0.004	2.054	2.160	17657	0.024	0.002	0.034	381
052 Dried fruit	0.217	...	...	...	0.026	0.014	0.056	634
053 Fruit, preserved and fruit preparations	0.015	0.239	0.115	542	0.044	0.000	0.095	1070
055 Vegetables, roots & tubers, preserved or prepared	...	0.015	0.007	55	0.048	0.035	0.119	1347
06 Sugar, sugar preparations and honey	0.067	0.257	0.291	2381	4.205	0.020	0.929	10208
0713 Coffee extracts, essences, concentrates & similar	...	0.071	0.035	266	...	...	0.007	82
0722 Cocoa powder, unsweetened	...	...	0.000	4	0.009	0.005	0.001	6
0723 Cocoa butter and cocoa paste	...	...	...	...	0.067	0.116	0.124	1399
073 Chocolate and related food preparations	0.017	0.042	0.236	1950	...	0.003	0.052	503
074 Tea and mate	...	...	0.001	4	2.241	2.504	2.277	25722
081 Feeding-stuff for animals	2.401	2.453	2.166	17868	0.123	0.041	0.248	2798
09 Miscellaneous food preparations	0.766	0.257	0.565	4616	0.175	0.025	0.135	1526
11 Beverages	0.068	0.107	0.117	953	1.761	0.276	0.533	10539
122 Tobacco manufactures	0.000	0.034	0.012	101	0.062	0.101	0.069	777
2219 Flour and meal of oil seeds, nuts, kernels	...	...	0.199	1625	...	...	...	...
231 Crude rubber, synth. & reclaimed(excl.SITC 2311)	0.000	...	0.000	0	0.115	0.855	0.403	4556
243 Wood, shaped or simply worked	...	0.013	0.001	11	1.540	1.037	1.360	15365
251 Pulp and waste paper	...	0.413	...	...	1.217	1.207	0.568	6415
3526 Wool shoddy	...	0.030	0.010	83	...	...	...	...
2627 Wool or other animal hair, carded or combed	...	...	...	...	0.003	...	0.000	0
2622 Wool tops	...	11.531	10.666	87188	...	...	...	...
2629 Waste of wool and other animal hair n.e.s.	...	1.166	0.762	6392	...	...	...	...
263 Cotton	...	...	...	...	2.410	2.246	1.062	11598
266 Synthetic and regenerated(artificial) fibres	...	...	0.042	342	1.565	2.155	0.872	9848
267 Waste materials from textile fabrics(incl.rags)	...	...	0.001	12	...	...	...	...
332 Petroleum products	0.003	0.714	0.004	34	3.084	3.956	4.428	50029
4 Animal and vegetable oils and fats	3.941	2.830	2.256	18438	0.128	4.205	0.916	10343
411 Animal oils and fats	0.018	0.063	0.878	7178	0.003	0.132	0.350	3955
431 Fixed vegetable oils, soft(incl.SITC 422)	3.901	2.716	1.312	10725	0.088	4.032	0.549	6203
431 Animal and vegetable oils and fats processed	...	0.059	0.065	835	0.016	0.045	0.016	185

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TABLE 5. PRODUCT MIX OF TRADED MANUFACTURED GOODS, 1970, 1975, 1980 <sup>a/</sup>

SITC DESCRIPTION OF TRADE GOODS	E X P O R T S				I M P O R T S			
	1970	1975	1980	1980	1970	1975	1980	1980 <sup>b/</sup>
	PERCENT IN TOTAL MANUFACTURES	PERCENT IN TOTAL MANUFACTURES	PERCENT IN TOTAL MANUFACTURES	(1000 US \$)	PERCENT IN TOTAL MANUFACTURES	PERCENT IN TOTAL MANUFACTURES	PERCENT IN TOTAL MANUFACTURES	(1000 US \$)
5 Chemicals	1.675	1.956	4.630	37847	15.667	28.722	17.176	154048
51 Chemicals elements and compounds	0.267	0.672	0.910	7442	4.151	9.004	4.572	51657
52 Tar and chemicals from coal, petroleum, nat. gas	...	...	...	...	0.022	0.120	0.054	1067
53 Dyeing, tanning and colouring materials	0.005	0.043	0.590	4821	2.053	2.562	1.553	17599
54 Medicinal and pharmaceutical products	0.252	0.664	0.253	2352	2.751	2.891	1.783	20142
55 Essential oils and perfume materials	0.234	0.025	0.646	5255	0.567	0.848	0.651	7361
56 Fertilizers, manufactured	0.159	0.066	0.749	6122	2.523	5.289	2.448	27661
57 Explosives and pyrotechnic products	...	...	...	...	0.056	0.027	0.044	498
58 Plastic materials, regenerated cellul. & resins	...	0.132	0.853	7301	3.791	5.580	4.431	50065
59 Chemical materials and products n.e.s.	0.703	0.300	0.547	4475	3.713	2.402	1.558	17595
6 Manufactured goods classified by material	25.550	22.024	19.730	161277	16.125	19.955	18.298	206729
61 Leather manufactures n.e.s. & dressed fur skins	1.229	7.531	6.471	52893	0.067	0.765	0.812	5170
62 Rubber manufactures n.e.s.	0.611	2.145	1.478	12084	0.200	0.463	0.743	8399
63 Wood and cork manufactures (excl. furniture)	0.057	0.000	0.033	267	0.173	0.263	0.345	3894
64 Paper, paper board and manufactures thereof	0.005	0.450	1.525	12467	2.947	2.367	1.405	15677
65 Textile yarn, fabrics, made-up articles	20.535	5.214	5.314	43437	2.771	3.025	2.815	21800
66 Non-metallic mineral manufactures, n.e.s.	2.628	5.431	3.165	26070	0.365	0.652	1.578	17631
67 Iron and steel	0.154	0.738	0.925	7560	6.875	8.577	5.961	67351
68 Non-ferrous metals	0.070	0.012	0.066	47	3.557	2.306	2.500	28249
69 Manufactures of metal, n.e.s.	0.300	0.458	0.789	6452	1.105	1.454	2.138	24159
7 Machinery and transport equipment	1.058	3.061	5.265	43201	39.914	25.837	44.189	455243
71 Machinery, other than electric	0.230	0.731	0.703	5750	20.374	15.655	18.780	212174
72 Electrical machinery, apparatus and appliances	0.758	0.513	1.701	13904	3.586	5.504	6.635	74959
73 Transport equipment	0.030	1.526	2.861	23547	15.554	6.678	18.774	212110
8 Miscellaneous manufactured articles	2.110	16.514	19.503	155426	2.176	2.365	5.017	56607
81 Sanitary, plumbing, heating & lightning fixtures	0.055	0.054	0.173	1412	0.067	0.041	0.083	941
82 Furniture	...	0.050	0.187	1529	0.000	0.005	0.122	1377
83 Travel goods, handbags and similar articles	...	1.465	1.862	15383	0.011	...	0.032	356
84 Clothing	0.710	11.458	14.765	120864	0.038	0.013	0.372	4204
85 Footwear	0.933	3.020	1.621	14881	...	...	0.080	901
86 Professional, scient. & controll. instruments	0.023	0.103	0.120	582	1.231	1.435	2.489	28121
89 Miscellaneous manufactured articles, n.e.s.	0.345	0.684	0.535	4374	0.828	0.867	1.840	20787
TOTAL MANUFACTURES	1970	1975	1980	1980	1970	1975	1980	1980
TOTAL: SITC 5-8 LESS 68 <sup>a/</sup>	153143	259757	217432	217432	182867	327061	1125798	1125798
TOTAL TRADED GOODS: SITC 6-9	232614	381156	1056951	1056951	232670	516477	1651851	1651851

Note: Data and SITC descriptions refer to SITC revision 1

<sup>a/</sup> This table is based on the definition of trade in manufactures covering a list of 148 specifically identified SITC 3-digit or 4-digit codes comprising a wide range of processing stages of manufactured goods.

<sup>b/</sup> Definition of trade in manufactures SITC 5-8 less 68 is one of the most often found.

It covers only items recognized as exclusively manufactured goods, i.e. with a high level of manufacturing content.

Source: UNIDO data base; Information supplied by the United Nations Statistical Office.

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TABLE 9 ORIGIN OF IMPORTS OF MANUFACTURES BY BRANCHES, 1980 #/

SITC DESCRIPTION OF TRADE GOODS	WCFLD TOTAL (1000 US\$)
01 Meat and meat preparations	1560
02 Dairy products and eggs	1113
002 Fish n.e.s. and fish preparations	4352
048 Cereals preparat. & starch of fruits & vegetab.	321
052 Dried fruit	634
053 Fruit, preserved and fruit preparations	1070
055 Vegetables, roots & tubers, preserved or prepared	1347
06 Sugar, sugar preparations and honey	10608
0710 Coffee extracts, essences, concentrates & similar	82
0722 Cocoa powder, unsweetened	6
0723 Cocoa butter and cocoa paste	1399
073 Chocolate and related food preparations	563
074 Tea and mate	25722
081 Feeding-stuff for animals	2758
09 Miscellaneous food preparations	1526
11 Beverages	10539
122 Tobacco manufactures	777
231 Crude rubber, synth. & reclaimed(excl.SITC 2311)	4556
243 Wood, shaped or simply worked	15365
251 Pulp and waste paper	6415
2627 Wool or other animal hair, carded or combed	0
263 Cotton	11998
266 Synthetic and regenerated(artificial) fibres	5848
332 Petroleum products	50029
4 Animal and vegetable oils and fats	10343
411 Animal oils and fats	3555
421 Fixed vegetable oils, soft(incl.SITC 422)	6203
431 Animal and vegetable oils and fats processed	185

DEVELOPING COUNTRIES (PERCENT)	TOTAL (PERCENT)	DEVELOPED MARKET USA (PERCENT)	ECCNOMIES EEC (PERCENT)	JAPAN (PERCENT)	CENTRALLY PLANNED DEVELOPED COUNTRIES (PERCENT)
1.47	66.93	2.62	62.05	0.00	29.70
34.70	65.30	21.49	41.85	0.00	0.00
93.63	6.17	0.09	1.62	0.00	0.00
40.63	55.37	0.74	52.06	0.00	0.00
55.33	44.67	7.87	6.77	0.00	0.00
83.03	16.25	1.45	3.12	0.00	0.00
83.07	15.22	6.55	4.38	0.00	0.00
55.20	4.69	0.56	1.64	0.07	0.00
65.68	34.32	0.00	34.32	0.00	0.00
93.29	6.71	6.71	0.00	0.00	0.00
99.55	0.45	0.00	0.45	0.00	0.00
56.26	41.74	0.67	32.71	0.00	0.00
98.63	1.37	0.00	1.37	0.00	0.00
28.91	70.62	8.35	49.92	0.00	0.41
40.81	55.11	22.68	33.60	0.52	0.00
7.94	91.91	0.69	88.09	0.00	0.15
46.82	53.18	22.64	30.26	0.00	0.00
52.47	47.53	15.03	24.27	2.88	0.00
97.58	2.42	2.01	0.41	0.00	0.00
66.29	13.71	13.33	0.00	0.00	0.00
0.00	100.00	0.00	100.00	0.00	0.00
98.80	1.20	1.18	0.02	0.00	0.00
18.32	61.67	35.23	12.19	16.23	0.00
90.14	5.86	6.14	3.52	0.01	0.00
87.83	12.17	8.89	1.44	0.00	0.00
75.90	24.10	20.48	1.25	0.00	0.00
96.23	3.77	1.37	0.88	0.00	0.00
61.45	36.55	13.27	24.22	0.00	0.00

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TABLE 9 ORIGIN OF IMPORTS OF MANUFACTURES BY BRANCHES, 1980 <sup>a/</sup>

SITC DESCRIPTION OF TRADE GOODS	WORLD TOTAL (1000 US\$)	DEVELOPING COUNTRIES (PERCENT)	DEVELOPED MARKET ECONOMIES				CENTRALLY PLANNED DEVELOPED COUNTRIES (PERCENT)
			TOTAL (PERCENT)	USA (PERCENT)	EEC (PERCENT)	JAPAN (PERCENT)	
5 Chemicals	194048	25.57	70.34	25.78	22.92	1.18	4.03
51 Chemicals elements and compounds	51657	28.73	62.78	13.24	35.66	0.88	8.47
52 Tar and chemicals from coal, petroleum, nat. gas	1067	74.48	25.52	2.99	21.16	0.00	0.00
53 Dyeing, tanning and colouring materials	17999	25.37	74.61	14.12	44.14	3.06	0.00
54 Medicinal and pharmaceutical products	20142	20.25	75.15	15.69	48.98	0.19	0.60
55 Essential oils and perfume materials	7361	29.44	70.36	19.57	38.66	0.04	0.00
56 Fertilizers, manufactured	27661	2.54	81.54	78.57	6.55	0.00	11.91
57 Explosives and pyrotechnic products	458	20.30	77.24	35.16	22.44	17.81	0.00
58 Plastic materials, regenerated cellul. & resins	50065	37.39	62.45	15.06	34.29	1.59	0.01
59 Chemical materials and products n.e.s.	17559	20.75	75.11	36.68	31.14	2.08	0.15
6 Manufactured goods classified by material	206729	55.40	41.65	10.09	17.61	3.71	2.07
61 Leather manufactured n.e.s. & dressed fur skins	9170	67.44	32.52	2.60	27.73	0.00	0.00
62 Rubber manufactures n.e.s.	8359	30.70	64.77	24.42	25.75	4.38	1.59
63 Wood and cork manufactures(excl.furniture)	3894	88.24	8.78	3.64	4.44	0.04	0.00
64 Paper, paper board and manufactures thereof	15877	37.89	61.66	8.34	11.76	0.62	0.15
65 Textile yarn, fabrics, made-up articles	31800	46.66	51.65	30.41	14.63	2.56	0.94
66 Non-metallic mineral manufactures, n.e.s.	17831	37.01	62.13	11.15	39.47	0.90	0.58
67 Iron and steel	67351	60.79	34.00	2.22	12.64	7.49	4.83
68 Non-ferrous metals	28245	82.32	17.65	2.63	9.93	1.82	0.03
69 Manufactures of metal, n.e.s.	24159	44.18	50.36	13.29	27.51	2.73	1.86
7 Machinery and transport equipment	459243	38.90	56.42	11.06	31.45	9.45	3.27
71 Machinery, other than electric	212174	30.32	61.94	17.02	33.81	6.15	6.60
72 Electrical machinery, apparatus and appliances	74959	38.65	55.41	14.23	23.27	9.42	1.75
73 Transport equipment	212110	47.56	61.25	3.57	31.59	13.84	0.48
8 Miscellaneous manufactured articles	56687	32.92	62.65	18.82	21.25	15.51	0.97
81 Sanitary, plumbing, heating & lightning fixtures	941	54.08	39.72	4.46	25.80	2.73	1.33
82 Furniture	1377	50.20	37.90	10.91	15.52	3.26	7.61
83 Travel goods, handbags and similar articles	356	40.43	29.77	28.58	3.98	5.66	0.13
84 Clothing	4204	38.14	59.99	32.10	24.62	0.70	0.03
85 Footwear	501	77.88	20.56	20.39	0.17	0.00	0.00
86 Professional, scient. & controll. instruments	28121	31.93	65.77	15.84	19.40	21.06	1.43
89 Miscellaneous manufactured articles, n.e.s.	20787	29.03	63.86	21.10	24.28	13.23	0.14
TOTAL manufactures	1129798	45.55	50.86	13.06	25.46	6.01	2.61
TOTAL: SITC 5-8 LESS 68 <sup>b/</sup>	928458	38.10	57.60	14.65	26.71	7.07	3.12
TOTAL traded goods: SITC 6-9	1651851	60.91	36.57	9.75	17.88	4.11	1.84

Note: Data and SITC descriptions refer to SITC revision 1

<sup>a/</sup> This table is based on the definition of trade in manufactures covering a list of 148 specifically identified SITC 3-digit or 4-digit codes comprising a wide range of processing stages of manufactured goods.<sup>b/</sup> Definition of trade in manufactures SITC 5-8 less 68 is one of the most often found.

It covers only items recognized as exclusively manufactured goods, i.e. with a high level of manufacturing content.

Source: UNIDO data base; Information supplied by the United Nations Statistical Office.

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TABLE 10 DESTINATION OF EXPORTS OF MANUFACTURES BY BRANCHES, 1980 %/

SITC DESCRIPTION OF TRADE GOODS	WORLD TOTAL (1000 US\$)	DEVELOPING COUNTRIES (PERCENT)
01 Meat and meat preparations	167492	66.54
02 Dairy products and eggs	16701	99.41
032 Fish n.e.s. and fish preparations	22	100.00
0422 Rice, glazed or polished not otherwise worked	50466	93.91
046 Meal and flour of wheat or of meslin	57	100.00
048 Cereals preparat. & starch of fruits & vegetab.	17657	100.00
053 Fruit, preserved and fruit preparations	942	84.78
055 Vegetables, roots & tubers, preserved or prepared	55	94.53
06 Sugar, sugar preparations and honey	2381	42.11
0713 Coffee extracts, essences, concentrates & similar	266	100.00
0722 Cocoa powder, unsweetened	4	100.00
073 Chocolate and related food preparations	1950	100.00
074 Tea and mate	4	100.00
081 Feeding-stuff for animals	17863	3.02
09 Miscellaneous food preparations	4616	99.95
11 Beverages	953	100.00
122 Tobacco manufactures	101	99.75
2215 Flour and meal of oil seeds, nuts, kernels	1625	0.00
231 Crude rubber, synth. & reclaimed(excl.SITC 2311)	0	0.00
243 Wood, shaped or simply worked	11	100.00
262E Wool shoddy	83	42.61
262E Wool tops	67188	11.21
262S Waste of wool and other animal hair n.e.s.	6392	10.88
266 Synthetic and regenerated(artificial) fibres	342	98.33
267 Waste materials from textile fabrics(incl.rags)	12	80.18
332 Petroleum products	34	96.97
4 Animal and vegetable oils and fats	18438	54.98
411 Animal oils and fats	7178	98.20
421 Fixed vegetable oils, soft(incl.SITC 422)	10725	23.81
431 Animal and vegetable oils and fats processed	535	100.00

TOTAL (PERCENT)	DEVELOPED MARKET USA (PERCENT)	ECCOMIES EEC (PERCENT)	JAPAN (PERCENT)	CENTRALLY PLANNED DEVELOPED COUNTRIES (PERCENT)
34.46	2.15	20.61	0.00	0.00
0.59	0.00	0.06	0.00	0.00
0.00	0.00	0.00	0.00	0.00
6.06	0.00	2.90	0.00	0.03
0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00
12.77	0.00	12.77	0.00	0.00
5.47	0.00	5.47	0.00	0.00
57.89	0.00	56.14	0.00	0.00
0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00
94.83	0.00	72.43	17.91	2.15
0.05	0.04	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00
0.25	0.25	0.00	0.00	0.00
100.00	0.00	100.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00
57.39	57.39	0.00	0.00	0.00
75.90	0.30	73.34	3.11	2.04
65.12	58.01	10.83	19.67	0.00
0.00	0.00	0.00	0.00	0.00
15.82	0.00	15.82	0.00	0.00
0.00	0.00	0.00	0.00	0.00
35.51	0.00	30.26	0.00	2.15
1.80	0.00	0.00	0.00	0.00
66.71	0.00	52.03	0.00	3.69
0.00	0.00	0.00	0.00	0.00

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TABLE 10 DESTINATION OF EXPORTS OF MANUFACTURES BY BRANCHES, 1980 <sup>a/</sup>

SITC DESCRIPTION OF TRADE GOODS	WORLD TOTAL (1000 US\$)	DEVELOPING COUNTRIES (PERCENT)	DEVELOPED MARKET ECONOMIES				CENTRALLY PLANNED DEVELOPED COUNTRIES (PERCENT)
			TOTAL (PERCENT)	USA (PERCENT)	EEC (PERCENT)	JAPAN (PERCENT)	
5 Chemicals	37647	54.68	4.90	2.31	2.34	0.00	0.04
51 Chemicals elements and compounds	7442	55.47	0.33	0.17	0.11	0.00	0.00
53 Dyeing, tanning and colouring materials	4821	58.65	0.11	0.00	0.11	0.00	0.00
54 Medicinal and pharmaceutical products	2392	63.22	36.72	16.87	19.91	0.00	0.00
55 Essential oils and perfume materials	5255	59.05	0.65	0.00	0.00	0.00	0.00
56 Fertilizers, manufactured	6122	59.97	0.00	0.00	0.00	0.00	0.00
56 Plastic materials, regenerated cellul. & resins	7301	59.14	0.26	0.23	0.04	0.00	0.00
59 Chemical materials and products n.e.s.	4475	79.60	15.86	9.83	6.78	0.00	0.34
6 Manufactured goods classified by material	161277	51.71	35.35	8.24	26.21	0.10	4.24
61 Leather manufactured n.e.s. & dressed fur skins	52853	9.50	75.87	19.90	43.81	0.00	11.05
62 Rubber manufactures n.e.s.	12084	99.94	0.06	0.03	0.04	0.00	0.00
63 Wood and cork manufactures (excl. furniture)	267	91.31	6.65	0.82	7.87	0.00	0.00
64 Paper, paper board and manufactures thereof	12467	59.79	0.00	0.00	0.00	0.00	0.00
65 Textile yarn, fabrics, made-up articles	43437	46.90	36.76	2.08	31.13	0.23	1.97
66 Non-metallic mineral manufactures, n.e.s.	26070	87.32	12.17	7.08	3.61	0.05	0.49
67 Iron and steel	7560	96.85	0.00	0.00	0.00	0.00	0.00
68 Non-ferrous metals	47	100.00	0.00	0.00	0.00	0.00	0.00
69 Manufactures of metal, n.e.s.	6452	46.13	50.95	0.02	46.46	0.00	0.00
7 Machinery and transport equipment	43201	92.91	6.24	2.24	3.82	0.02	0.00
71 Machinery, other than electric	5750	65.58	14.25	8.08	6.00	0.17	0.00
72 Electrical machinery, apparatus and appliances	13904	96.50	1.32	0.00	1.29	0.00	0.00
73 Transport equipment	23547	92.59	7.19	2.13	4.79	0.00	0.00
8 Miscellaneous manufactured articles	159426	20.10	79.20	24.70	45.75	0.08	0.66
81 Sanitary, plumbing, heating & lightning fixtures	1412	86.71	13.29	12.23	0.00	0.00	0.00
82 Furniture	1529	78.91	21.09	19.34	0.78	0.00	0.00
83 Travel goods, handbags and similar articles	15383	12.84	66.75	23.67	39.37	0.00	0.41
84 Clothing	120664	16.44	63.05	27.42	46.27	0.11	0.47
85 Footwear	14861	15.84	77.38	12.42	36.18	0.00	2.77
86 Professional, scient. & controll. instruments	982	83.10	16.45	3.76	6.48	0.00	0.00
89 Miscellaneous manufactured articles, n.e.s.	4374	91.28	7.98	5.25	2.45	0.05	0.00
TOTAL manufactures	817432	52.28	44.63	7.65	29.67	0.91	1.92
TOTAL: SITC 5-8 LESS 62 <sup>a/</sup>	401704	47.64	46.36	13.57	28.91	0.07	1.96
TOTAL traded goods: SITC 0-9	1058951	47.65	43.82	7.80	26.42	0.88	7.59

Note: Data and SITC descriptions refer to SITC revision 1

<sup>a/</sup> This table is based on the definition of trade in manufactures covering a list of 148 specifically identified SITC 3-digit or 4-digit codes comprising a wide range of processing stages of manufactured goods.

<sup>a/</sup> Definition of trade in manufactures SITC 5-8 less 62 is one of the most often found.

It covers only items recognized as exclusively manufactured goods, i.e. with a high level of manufacturing content.

Source: UNIDO data base; Information supplied by the United Nations Statistical Office.

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TABLE 11. SHARES OF EXPORTS AND IMPORTS CLASSIFIED ACCORDING TO LEVEL OF PROCESSING 1970 AND 1980 AND TREND GROWTH RATES 1970-1975 AND 1975-1980

CLASSES	E X P O R T S				I M P O R T S			
	CLASS SHARE OF TOTAL		CLASS GROWTH RATE		CLASS SHARE OF TOTAL		CLASS GROWTH RATE	
	(PERCENTAGE)		(PERCENTAGE)		(PERCENTAGE)		(PERCENTAGE)	
	1970	1980	1970-1975	1975-1980	1970	1980	1970-1975	1975-1980
A : Non-processed goods for further processing	21.93	17.99	26.20	6.09	8.00	30.63	75.55	20.03
B : Processed goods for further processing	7.38	22.09	51.72	19.06	30.70	14.21	8.97	22.51
C : Non-processed goods for final use	59.80	23.19	6.52	16.53	4.53	3.18	19.41	17.06
D : Processed goods for final use	10.85	36.73	43.42	33.97	56.76	51.98	10.87	31.01
Sum of classes: A+B+C+D in 1000 current US\$		1970 153294		1980 1058551		1970 232870		1980 1651851
Total trade SITC 0-9 : 1000 current US\$		232514		1058551		232870		1651851

SOURCE: UNIDO data base; Information supplied by the United Nations Statistical Office, with estimates by the UNIDO Secretariat.

Note: Calculations are based on current us dollar prices.  
Sum of classes and Total trade figures should be identical. Discrepancies or zero values are due to lack of countries' trade reporting in general, but especially at the 3-, 4- and 5-digit SITC level.

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3. INDUSTRIAL DEVELOPMENT STRATEGY, POLICIES AND PLANS

3.1 Principles, Objectives and Targets

The most recent National Development Plan of Uruguay covered the period 1973-1977 and was initiated after the role of government was undertaken by the Military in 1972. The basic principle in the Plan with respect to industrial development strategy was to open up the economy. Stagnation of the Uruguayan economy was seen to be the result of excessive protectionism and inefficient allocation of resources to activities in which the country had no comparative advantage. Moved by this principle, the Plan established as its basic objective the gradual elimination of barriers to international trade and capital movements. Tariffs on imports were reduced and financial flows from abroad were stimulated.

The 1973-77 Plan differed in important ways from its predecessors. One of its most relevant features was the emphasis given to diversifying the country's productive structure. The Plan recognized that opening up the economy exclusively on the basis of traditional export sectors would not be sufficient, given historical experience, and that some industrial branches should have a significant role to play. The Plan emphasized policies aimed at increasing the overall efficiency of overly protected branches of manufacturing. Other important objectives for industry included the promotion of agro-based manufacturing, the development of labour-intensive industries in order to reduce unemployment, and the improvement of activities oriented to satisfying local demand.

At first the Plan achieved some of the anticipated results. Gross Domestic Product rose sharply, averaging 3.9% in growth in 1974-79; manufactured exports increased, as did savings and investment rates. With respect to industrial development, the rate of growth targets for the sector were actually surpassed: the Plan established a 5% annual growth rate for 1973-77 and actual performance in that period was around 5.4%.



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By the end of the seventies, the government began to rank the control of inflation as a higher priority than the various objectives referred to in the Plan. As a result of the emphasis given to stabilization measures, the industrial development policy gradually lost its specific profile and incentives or disincentives to manufacturing activities came to depend on the impact of the anti-inflationary policies.

The most important instrument used by the government to control inflation was to appreciate the exchange rate in real terms. This meant that goods exposed to external competition in the domestic market could not increase their prices at the rate of inflation. After a period, production of tradeable goods began to be affected negatively, particularly in those industries which had no tariff protection. Those sectors for which tariffs were not lowered substantially were less affected. The exchange rate policies were coupled with massive capital movements which at first reinforced the relative appreciation of local currency vis-a-vis international currencies. As a result, interest rates in pesos became positive in real terms and inhibited many industrial firms from investments that adaptation to international competition would have made necessary.

The main stabilization measures were:

- A. Liberalization of the financial sector. The authorities dismantled controls on interest rates and unified the exchange rate. Banks were free to establish the cost of credit and to grant loans to customers they considered worthy risks. Subsidized credit was reduced significantly. Given the lower interest rates for foreign currency loans, in comparison to local financing, the access of some manufacturing firms to international finance became an important advantage over those that did not have such access. In general, private banks granted relatively cheaper credit to bigger firms with important assets. Public entities, however, seemed to direct lower-interest loans to chosen sectors and to small- and medium-sized firms (see section 5.4 below).

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- B. Reduction of import controls. The authorities lowered import tariffs and planned to continuing lowering them to a maximum duty of 35% by 1985. Import quotas were also removed and non-tariff barriers significantly lowered. This process was not applied with the same fervency to all industrial sectors and for that reason effective protection rates have varied greatly among different activities. Some branches of industry were given special treatment, the most outstanding case being manufacturers of auto parts where regulations for minimum requirements of national content were established for local assemblers.
- C. Price liberalization. The policy sought to create an environment in which prices would be set exclusively by market forces. Following this orientation the authorities decontrolled most prices, excepting a list of goods considered to be of significant importance in local consumption, including bread, pasta, milk, textbooks, gasoline, kerosene and pharmaceutical products among others.

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3.2 Policy Instruments

Industrial Promotion Law 14178 and Foreign Investment Law 14179 were adopted in 1974. Apart from the indirect but strong impact of the macro-economic policy measures referred to above, these two laws were designed to direct investment decisions in the productive structures of the economy.

The industrial promotion law offers a number of incentives to enterprises which fulfil certain eligibility criteria based on improving efficiency, increasing and diversifying exports, introducing new industries or expanding existing ones, technological development and training programs. Granting of benefits is based on a case-by-case consideration of national interest. The following benefits are available:

- A. Credits: Mortgage credits for up to 75% of land and building value for new industries or expansions, credits for the purchase of equipment, machinery and spare parts up to 80% of their value; credits for the acquisition of local raw materials to be processed and exported up to 80% of total value; preinvestment credit; credits for up to 50% of start-up and initial working capital, foreign currency credits for the import of machinery and raw materials.
  
- B. Tax and Tariff Incentives: Total or partial exemption from all taxes and charges; discounts on public services charges; exemptions up to 60% on social charges; exemptions from taxes on profits and their distribution; exemption from custom duties and import charges and deferment of obligations derived from imports for export production; exemptions from registration fees on new capital and real estate taxes; deductibility of amounts invested in nominative shares, etc. Several regulations have expanded tax incentives for certain sectors, including fishing, forestry and fertilizers.

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Some 400 projects have been declared as in such national interest in the period March 1974-June 1983 (See Table 12). They include 303 projects in the manufacturing sector, 36.5% of which are in the food industry, 16% in textiles, 15.3% in chemicals. The value of fixed investments amounts to US\$ 416.7 million. Of the total number of projects, 78% are for expansions of existing industries. Apart from the incentives of Law 14178, other legislation provides export incentives, especially in non-traditional sectors. Such benefits include exemption of taxes on income derived from or related to export activities; tax rebates; a temporary admission regime; export credit insurance and export credits.

- C. Law 14179 on foreign investments was intended to promote the establishment of foreign-owned companies through the granting of special benefits, such as guarantees for profits remittances and capital repatriation. No requirements of local equity participation are imposed, although majority-owned foreign firms do not have access to local medium- and long-term credit, and investments in certain sectors - petrochemicals, nuclear energy, meatpacking, electricity, banking, and public services in general - need special authorization of the President.

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Table 12. Sectoral Distribution of Projects  
Declared as of National Interest (1974-1983)

Code	SECTOR	Declarations of National Interest					
		Number of Projects			Fixed Investment		Employment
		Total	New	Expansions	1,000 U.S. \$	%	
290	Mining	4	2	2	2,713.8	0.7	56
311	Meat Process	13	4	9	44,355.5	10.6	498
312	Dairy Products	15	5	10	10,133.3	2.4	373
313	Fruit, Veget. Process	8	3	5	19,269.9	4.6	863
314	Seafood	7	7	0	17,614.0	4.2	1,373
315	Veget. oil	4	1	3	8,449.1	2.0	38
316	Various Food	10	6	4	27,108.2	6.5	199
317	Beverages	6	0	6	25,791.2	6.2	-6
320	Wool Tops	4	0	4	12,794.3	3.1	-79
321	Textiles	45	1	44	43,056.2	10.3	176
322	Garment	5	0	5	3,798.6	0.9	538
323	Leather	2	0	2	356.3	0.1	40
324	Shoes	2	1	1	1,772.5	0.4	705
325	Textile Products	12	2	10	7,200.3	1.7	119
331	Wood Products	6	2	4	14,894.4	3.6	285
332	Furniture	1	1	0	134.2	0.0	-2
341	Paper	9	0	9	26,834.5	6.4	62
342	Printing	12	0	12	4,583.4	1.1	-63
351	Chemicals	21	4	17	23,820.4	5.7	378
352	Chemicals	11	4	7	13,143.4	3.2	248
354	Oil Derivatives	1	1	0	552.2	0.1	27
355	Rubber Products	11	1	10	10,110.9	2.4	193
356	Plastic Products	17	4	13	16,299.3	3.9	496
362	Glass Products	5	1	4	4,674.0	1.1	129
369	Non metallic minerals	6	0	6	3,854.4	0.9	-15
371	Iron and Steel	4	0	4	20,394.7	4.9	35
372	Non ferrous minerals	1	0	1	457.3	0.1	35
381	Metallic Products	14	5	9	4,844.7	1.2	241
382	Machinery	3	0	3	822.0	0.2	42
383	Electric Machinery	12	3	9	6,637.2	1.6	272
384	Transport Material	8	3	5	6,793.4	1.6	221
385	Scientific Equipment	8	1	7	1,041.7	0.2	89
390	Jewels	5	2	3	732.3	0.2	151
391	Various Industries	7	1	6	2,591.3	0.6	129
500	Construction	2	1	1	4,135.0	1.0	42
632	Tourism	4	1	3	24,773.6	5.9	184
833	Machinery Services	1	0	1	72.0	0.0	1
900	Solar collectors	1	1	0	114.0	0.0	0
TOTAL		307	68	239	416,723.5	100.0	8,073

Source: Fondo de Financiamiento de Inversiones para el Desarrollo, Boletín Estadístico, June 1983.

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4. INSTITUTIONAL FRAMEWORK FOR INDUSTRY

A. General Regulation and Promotion

1. Secretary of Planning, Coordination and Diffusion (SEPLACODI).

Created in 1976, SEPLACODI formulates the national development plans and programs and coordinates the policies of the various ministries. It presides over the Advisory Unit which is in charge of authorizing foreign investments. It also provides assistance and information to prospective investors in industrial projects.

2. Ministry of Economy and Finance. Grants final authorization to foreign investments, regulates and controls prices through the Dirección Nacional de Costos, Precios e Ingressos (DINACOPRIN) and adminstrates taxes through the Dirección General Impositiva (DGI).

3. Ministry of Industry and Energy. The Advisory Unit for Industrial Promotion coordinates all industrial activities, implementing plans and programs, supervising pre-investment activities and participating in the study of credit applications made to the Fondo de Financiamiento de Inversiones. The Technical Assistance Unit for Industrial Development collaborates with the Advisory Unit in the industrial promotion system, evaluating the projects submitted to the Ministry. A coordinating Committee composed of the Technical Assistance Unit, the Ministries of Industry and Economy, SEPLACODI and the Central Bank provides final approval to projects.

B. Finance (see also section 5.4 below)

1. Central Bank. In charge of the monetary and financial policy, controls foreign exchange transactions and export subsidies, and manages the Fondo de Financiamientos de Inversiones.

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2. Banco de la República. A State commercial bank with a large network of agencies throughout the country.

3. Banco Hipotecario. State owned bank dedicated to the long-term financing of housing projects.

4. Fondo de Financiamiento de las Inversiones: A facility for development financing within the Central Bank.

C. Research and Development

1. National Council of Scientific and Technological Research. Created in 1961, its role is to promote and develop scientific activities at all levels. Advises the government in technology matters. Despite its functions, it has very limited resources.

2. Centro Nacional de Tecnología y Productividad Industrial. Promotes applications of research in industry. Offers technical assistance to selected branches of industry.

3. Laboratorio Tecnológico del Uruguay (LATU). Provides technical support, particularly in form of quality control.

4. Consejo de Capacitación Profesional. (see Section 5.1 below)

5. Comisión Nacional de Energía Atómica. A para-statal body in charge of research in the field.

6. Instituto Uruguayo de Normas Técnicas. In charge of technical standards for industry.

7. Comisión Coordinadora para el Desarrollo Económico (COMCORDE). A private group, with economic research activities.

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D. International and Regional Cooperation - Uruguay participates in the following multilateral schemes:

1. Latin American Integration Association (LAIA) (1960). Uruguay enjoys "less developed country" status in this mechanism of trade liberalization. The LAIA area accounts for 30.7% of total exports of Uruguay (1982). Uruguay participates in several "industrial complementation agreements" for the specialization in trade of some products (chemicals, electrical machinery) among Latin American Countries.

2. River Plate Basin (1969). Created by Argentina, Bolivia, Brazil, Paraguay and Uruguay, it is devoted to the identification and promotion of hydroelectrical and other infrastructure projects. It has a Development Fund.

3. URUPABOL (1963). A small group with Paraguay and Bolivia, with emphasis on the promotion of reciprocal trade and transport and communications projects.

4. Sistema Económico Latinoamericano. Membership includes 24 other Latin American Nations; Uruguay has not participated significantly in this system of economic cooperation, although it takes part in the "Action Committee" for the food sector.

5. Interamerican Development Bank.

6. General Agreement on Trade and Tariff (GATT).

7. Bilateral Agreements. The country has entered into several bilateral arrangements with other nations. Among the most important are:

- Economic Cooperation Agreement with Argentina (1974).  
Liberalization of Argentine imports of Uruguayan goods.

- Protocol of Commercial Expansion with Brazil (1975). Reciprocal commercial concessions.



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5. Resources for Industrial Development

5.1. Human Resources

The labour force in 1980 was estimated at 1.11 million, or 63% of the total population. Employment data are available only for the Montevideo area, where the share of unemployment was officially estimated at 8.1% by the end of 1979 and at 6.8% at the end of 1980, although higher percentages of unemployment were suffered in the manufacturing industry (food, beverages, tobacco: 8.3%; textiles and leather: 11.2%; metallic products 7.7%)\*. About 32.4% of the labour force is employed in industry, 10.8% in agriculture and 56.8% in services. The largest number of industrial workers are engaged in the consumer goods sector (60%).

The overall level of education is high by developing countries' standards: about 94% of the total population is considered literate. The share of enrollment in secondary education is 59% and in University or equivalent institutions, 18%. Education is free of charge in all levels and compulsory for primary and secondary school. The government spends about 25-30% of the annual budget in education. Technical and professional education in Uruguay is provided by Universidad del Trabajo (University of Labor). About 50,000 students attend 86 technical schools and nearly 70 mobile courses.

In 1978, the government set up the Consejo de Capacitación Profesional, subordinate to the Ministry of Education, - "in view of the need to promote

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\* In order to evaluate correctly the capacity of labor absorption of the Uruguayan economy, account must be taken of the significant emigration that took place in the sixties and seventies, leading to a negative balance of migratory flows equivalent to 0.5% annually during 1963-1973 and to 0.9% between 1973 and 1979.

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the professional training of the national labor force, given the present technological needs". Its role is to formulate policies and guidelines for the execution of specific programs and projects, distribute the resources allocated to the system, supervise training projects by an Executive Agency, etc. The Council, which began effective operations in 1982, can request the collaboration of state entities, public enterprises and private organizations with training activities. In order to ensure the participation of private enterprises in the system, the Council is entitled to create Advisory Technical Commissions in different sectors.

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5.2 Raw Material ResourcesA. Agriculture

The small territory of Uruguay is endowed with a relatively abundance of land well-suited to agriculture. About 12% of the territory is cultivated (two-thirds with cereals). Main crops include wheat, corn, rice, linseed, sunflower, beets, sugarcane.

Table 13: Main Crops: Planted Areas, Output and Yield\*

	1972/73	1973/74	1974/75	1975/76	1976/77	1977/78	1978/79	1979/80
Wheat								
Planted areas	185.0	292.1	451.5	462.9	543.5	321.4	219.1	320.2
Output	186.5	296.8	526.5	455.7	504.9	173.2	174.7	429.5
Yield	1003	1016	1166	984	929	539	795	1342
Rice								
Planted areas	34.5	42.7	46.9	52.3	56.8	58.4	68	67
Output	136.9	157.9	188.5	216.5	228.3	225.6	248	...
Yield	3964	3701	4018	4138	4016	3865	3646	...
Linseed								
Planted areas	47.9	43.4	71.0	102.5	73.9	88	69.1	99.9
Output	29.5	26.3	39.3	61.7	46.4	39.8	31.2	65.1
Yield	616	606	554	601	628	453	452	651
Sunflower								
Planted areas	108.6	104.4	104.1	136.1	102.3	142	129.9	86.2
Output	71.1	48.4	51.4	77.1	34.4	71.6	51.4	...
Yield	654	463	494	567	336	504	396	...
Corn								
Planted areas	225.8	201.3	153.4	176.7	158.5	178.1	131.1	131.9
Output	228.6	225.2	157.1	210.4	121.0	171.7	70.9	...
Yield	1012	1119	1025	1191	763	964	541	...
Beets								
Planted areas	14.9	13.9	22.1	27.6	23.4	18.2	17.9	...
Output	370.5	434.2	573.3	683.1	596.9	375.9	356.7	...
Yield	24,895	31,186	25,907	30,186	25,494	20,660	19,927	...

\* Planted area is expressed in thousands of hectares, output in thousands of tons and yield in Kg per hectare.

Source: Banco Central del Uruguay

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### Livestock

Livestock production provides roughly 60% of the agricultural output of Uruguay and historically has been the main support of the national economy. By 1980, the total estimated number of livestock consisted of about 10 million cattle, 16.2 million sheep, 550,000 horses and 400,000 pigs. The slaughter of bovines (the main livestock) amounted to 1.9 million heads in 1981. Livestock production has been seriously affected in the last decade by contradictory policies aimed at several, conflicting objectives, such as maintaining low prices of beef for local consumption while at other times encouraging production for exports and preservation of stocks.

Wool (Production 1980: 67,000 tons; Exports: 53,000 tons) and milk (805 million liters in 1981) are also important components of the rural production of Uruguay. In addition to the strong export orientation of some of these items, they constitute the main raw materials for several leading branches of the manufacturing industry of Uruguay.

### Fisheries

Since 1975 the government has strongly encouraged fishing activities and production has been increasing steadily. Tax and credit incentives are offered for fishing equipment and factories, and several foreign investment projects have been attracted to this sector. Annual exports were estimated at 67,000 tons valued at more than US\$ 57 million in 1981; an explosive increase over the last 10 years (1973: 1,600 tons, less than 1 US\$ million).

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Mining

Uruguay, together with Paraguay, has the poorest mining resources in Latin America. Despite intensive explorations no fuel deposits have been discovered. There are virtually no coal deposits and oil has been found in only very small quantities. A few signs of auriferous deposits have been detected. The only minerals of economic interest are granite for construction, marble and other stones. In addition, Uruguay is an important exporter of sand.

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### 5.3 Energy Resources

The electricity network of Uruguay covers about 82% of the territory, and the country as a whole enjoys one of the highest per capita consumptions of electricity in Latin America. The service is a state monopoly under the responsibility of the public enterprise UTE. Hydroelectrical sources - the most important are Palmar, with a generation capacity of 300 MW and Salto Grande, a binational complex built jointly with Argentina (945 MW) - account for more than 70% of the energy generated. The remainder is provided by thermal plants operated by UTE on the basis of imported oil\*. Total production of energy in 1981 was of 3.359 GWH.

There are several inter-grid projects with the electricity systems of Argentina and Brazil and a joint project for the construction of a pipeline to transport natural gas from Argentina. The government has taken some initiatives in the field of alternative energy sources, including the establishment of Working Programs for the exploitation of solar, biomass and firewood energy, the latter to be supported with a forestation program for 75,000 hectares. Recently the government has set up an Atomic Energy Commission which is receiving technical assistance from its counterpart institution in Argentina.

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\* Oil imports in 1980-1981 amounted to about US\$ 500 million, the equivalent of more than 40% of total exports.

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#### 5.4 Financial Resources

Apart from the Central Bank there are two other State Banks, the Banco de la Republica Oriental del Uruguay (BROU) and the Banco Hipotecario (BHU) and 22 private banks, 14 of which are foreign owned. There is also a system of 20 "casas bancarias" (merchant banks) with limited functions (financial intermediation, especially on foreign currency). There are no Development Banks in Uruguay. BROU is the largest credit institution, and one of the main sources of finance for industry, although about 90% of its credit to the private sector is on a short-term basis. Its lending rates, however, are lower than those of private banks. The industrial credit of BROU has followed a selective pattern, concentrated on the meatpacking industry and other sectors considered of national interest.

In addition, the Fondo de Financiamiento de Inversiones para el Desarrollo, operating within the Central Bank since 1976, channels short-, medium- and long-term credit for financing investments in the industrial and other productive sectors. The Fondo (Fund) was endowed with two windows, one with U.S. AID funds and dedicated to the finance of imports of capital goods and raw materials, as well as investments in export-oriented industries; and the other, backed by a World Bank loan, providing medium- and long-term credit for new investments and modernization projects for export-oriented producers of non-traditional industrial goods. The Fondo operates in conjunction with the Ministry of Industry and follows the criteria guidelines for designating projects of "national interest" which seek preferential treatment (see section 3.2 above). Another source of financial assistance is the "German Fund for small and medium industry", based on funds from the Kreditanstalt fur Wiederaufbau (KfW) of the Federal Republic of Germany, in operation since 1981. Up to June 1983, 107 projects have been awarded more than US\$ 64 million in credit by the Fondo and the German Fund together.

The BHU at present is the main source of medium- and long-term funding in the country; yet the bulk of its operations is channeled into construction of low- and middle-income housing.

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Private commercial banks offer short-term credit at substantially higher rates than state banks. Foreign banks have concentrated on financing subsidiaries of transnational corporations.



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6. LIST OF TECHNICAL ASSISTANCE PROJECTS TO SUPPORT INDUSTRIAL DEVELOPMENT

UNIDO's Approved and/or Operational Technical Co-operation Projects

Approved Date	Estimated Completion Date	Project Number =Registry File=	Project Title
		DP/URU/83/011	Foreign investment promotion, preparatory assistance
1/81	1983	DP/URU/78/013**	Promotion of industrial investment projects
		SI/URU/83/801	Consultancy for the preparation of a national informatics seminar
9/81	1983	SI/URU/81/802	Strengthening of actions of technical co-operation between Universidad de la Republica and the industry

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\* Large-scale project (= total allotment \$150,000 or above)

\*\* Total allotment \$1 million or above

Source: Information provided by UNIDO's Division of Industrial Operations.

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