

REESTRUCTURACION INDUSTRIAL, PRODUCTIVIDAD Y TECNOLOGIA.

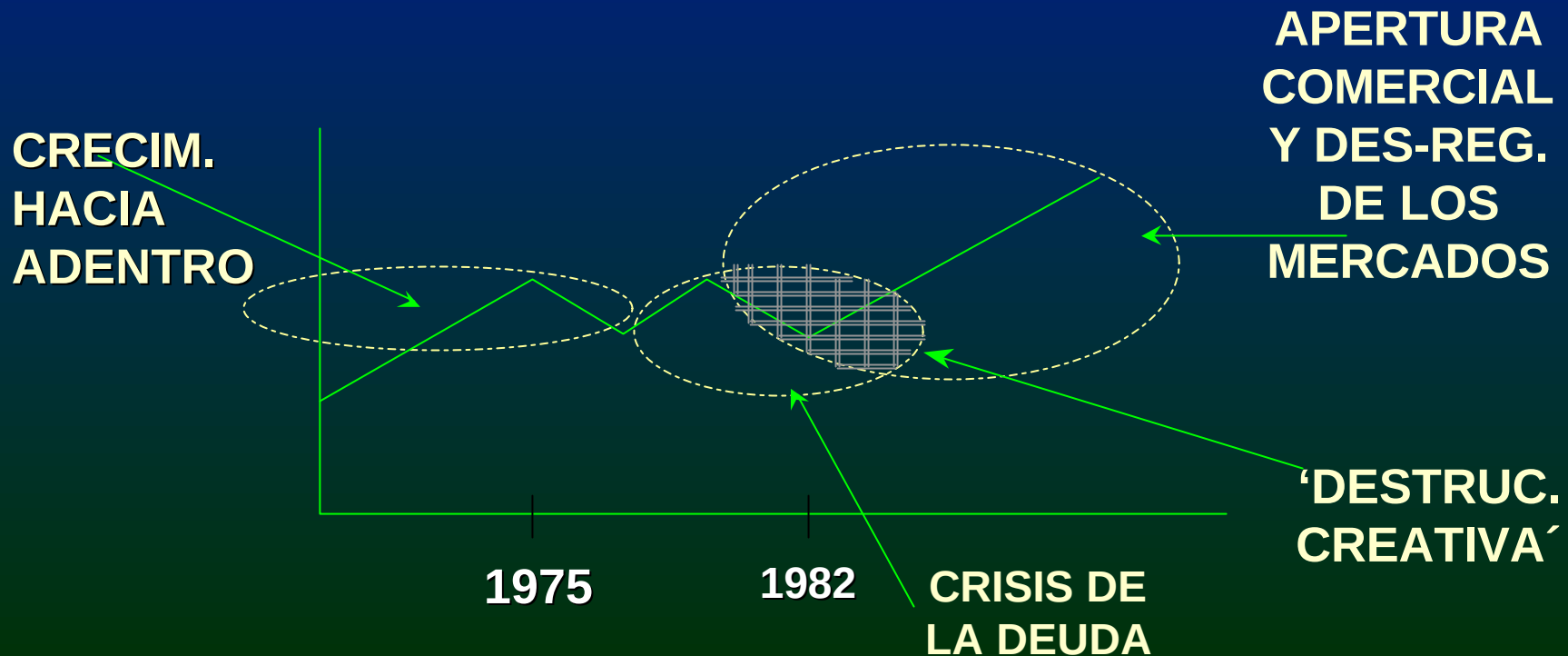
LA INDUSTRIA PETROQUIMICA

**JORGE KATZ,
U.de Chile; CONICET, Argentina.**

Septiembre 2004

FASES DEL DESARROLLO DE AMERICA LATINA.

HA MEJORADO LA PRODUCTIVIDAD RELATIVA?
SE HA REDUCIDO LA BRECHA DE PRODUCTIVIDAD?

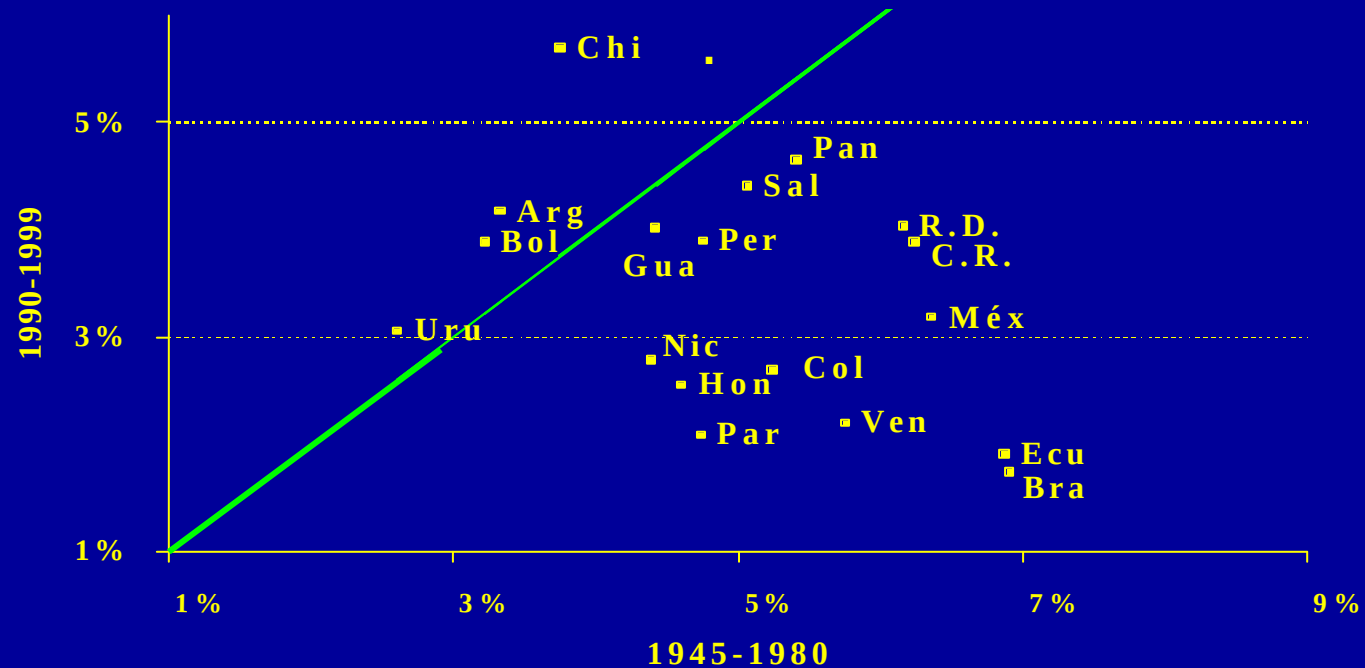


COMPARATIVE PERFORMANCE : 1945-2000

(ANNUAL GROWTH RATES)

	1945-1980	1980-1990	1990-2000	2000
RATE OF INFLATION	20%	400%	170.0%	9.2%
RATE OF GROWTH OF EXPORTS	2.1%	4.4%	9.4%	11.1%
RATE OF GROWTH OF IMPORTS	5.9 %	-0.8%	12.8%	12.3%
RATE OF GROWTH OF GDP	5.6%	1.2%	3.3%	4.3%
RATE OF GROWTH OF GDP PER CAPITA	3.1%	-1.8%	1.6%	2.2%
PERCENTAGE OF HOUSEHOLDS BELOW THE POVERTY LINE	35%	41%	38%	38%

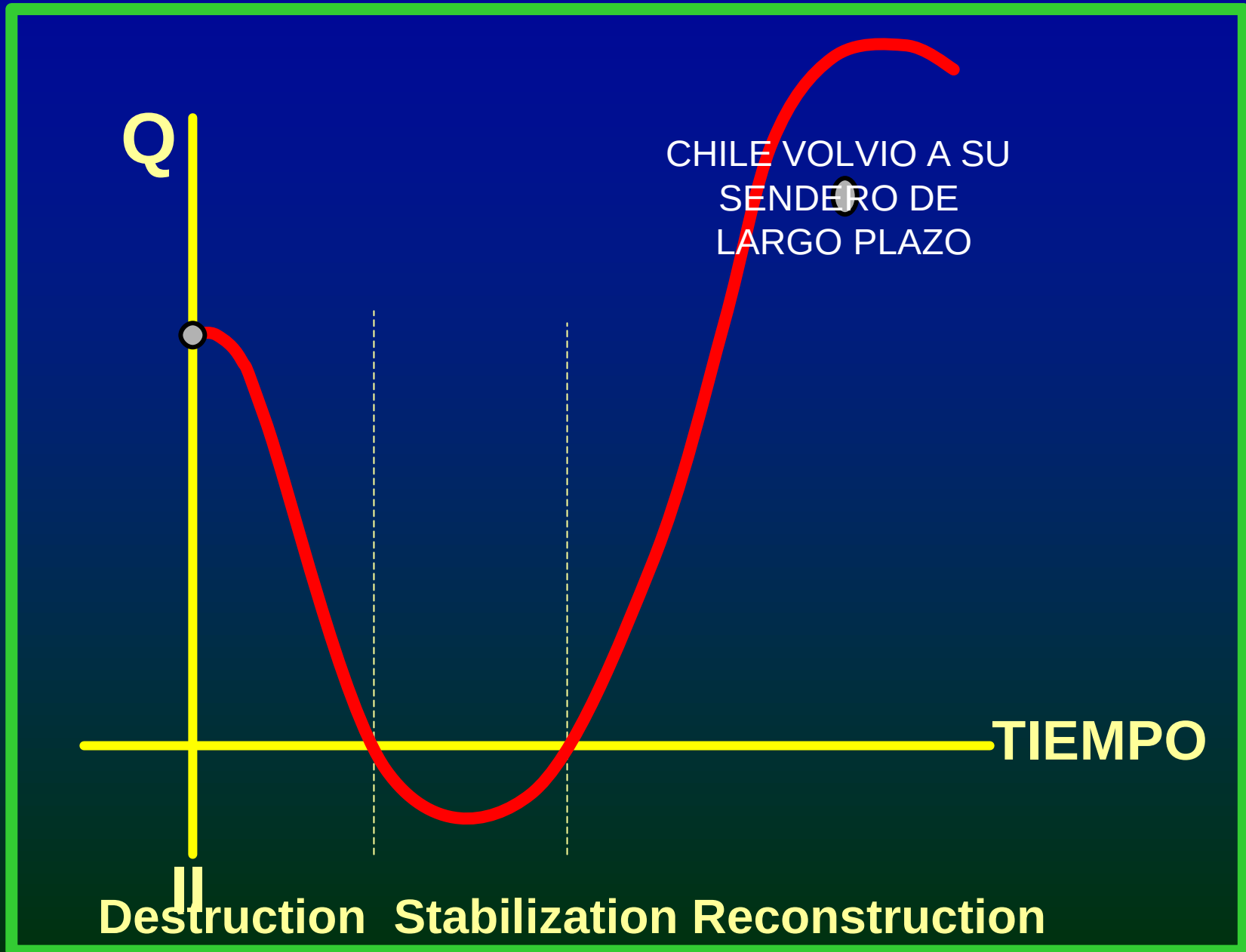
**ALMOST EVERY OTHER COUNTRY IN THE REGION
IS PERFORMING WORSE THAN BEFORE. WHY ?**



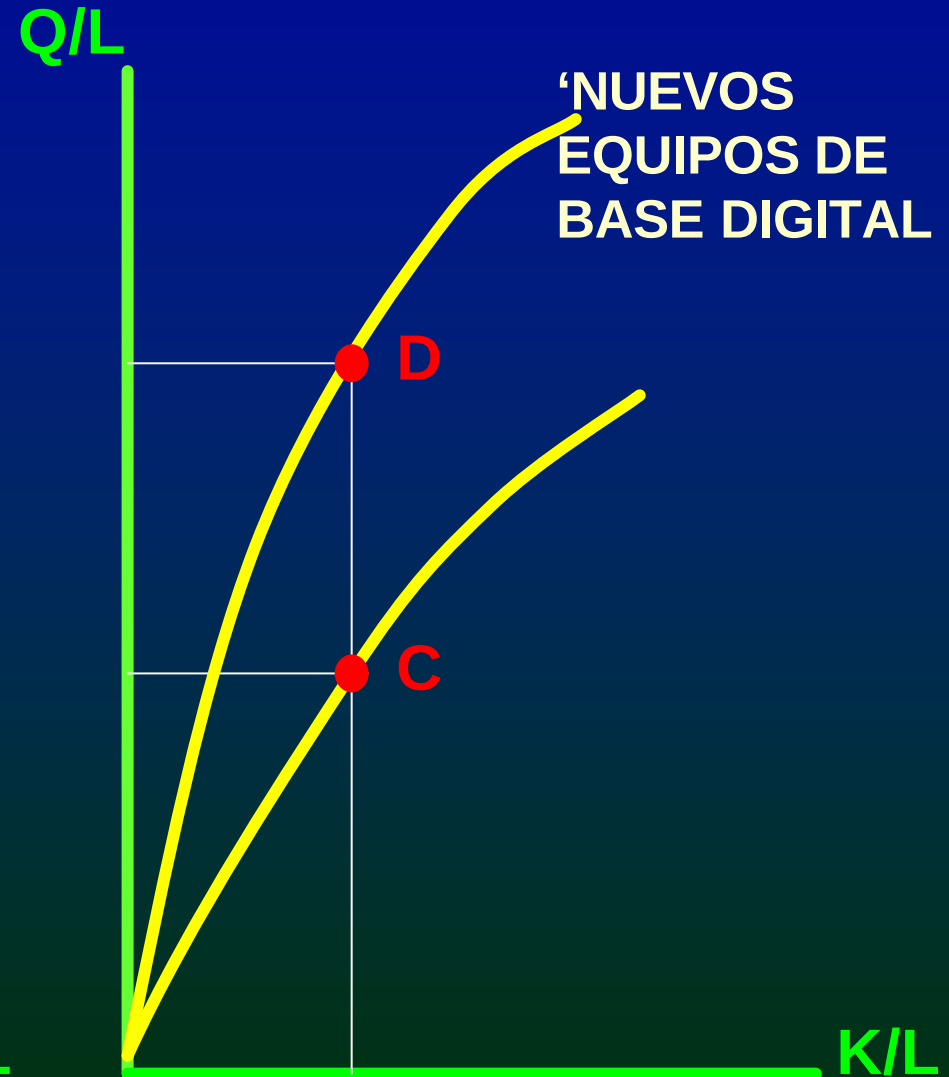
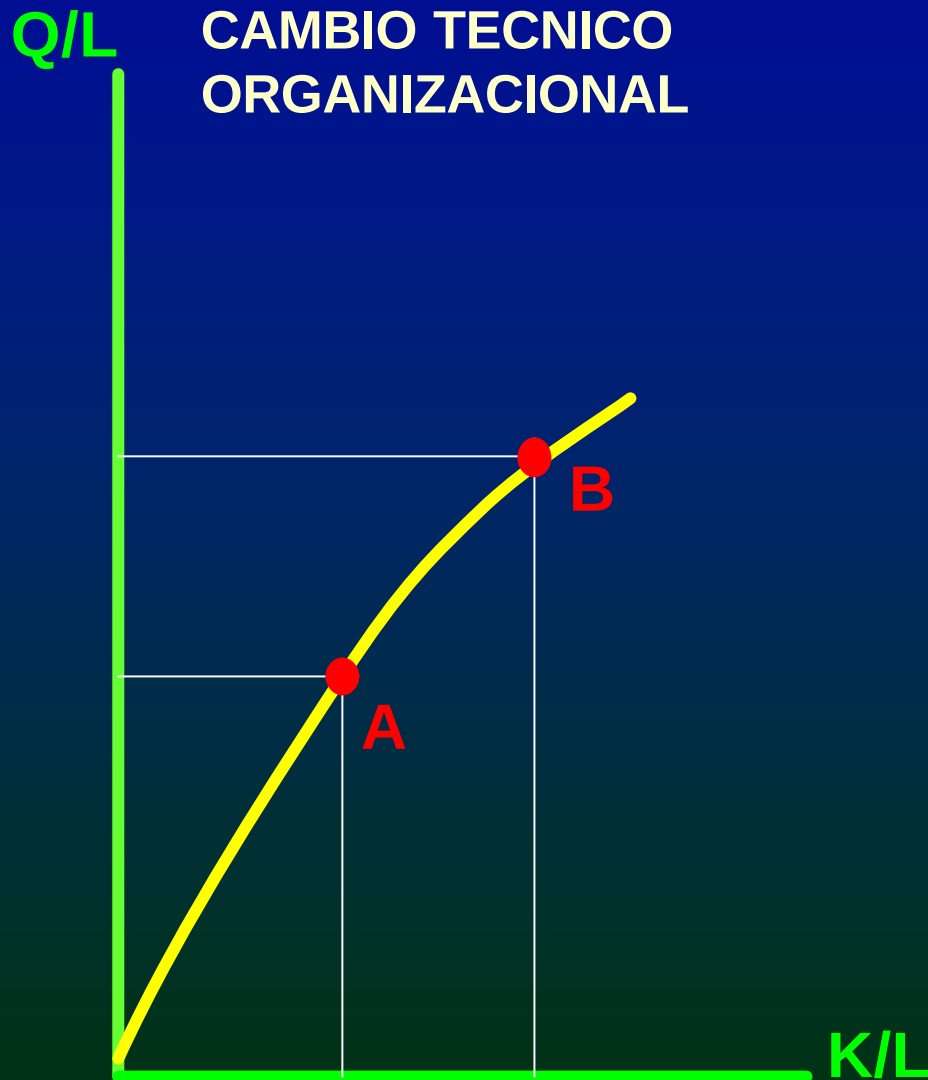
	MARKET SHARE		
	1985	1998	Difference
Argentina	0.37	0.51	0.14
Chile	0.23	0.32	0.09
México	1.55	2.24	0.69
Costa Rica	0.07	0.10	0.03
El Salvador	0.04	0.05	0.01
Guatemala	0.06	0.08	0.02
Honduras	0.05	0.07	0.02
R. Dominicana	0.08	0.10	0.02
Bolivia	0.04	0.02	-0.02
Brasil	1.37	1.01	-0.36
Colombia	0.24	0.24	0.00
Ecuador	0.17	0.11	-0.06
Paraguay	0.03	0.03	0.00
Perú	0.17	0.12	-0.05
Uruguay	0.07	0.06	-0.01
Venezuela	0.66	0.41	-0.25
Nicaragua	0.02	0.02	0.00
Barbados	0.02	0.00	-0.02
Cuba	0.03	0.02	-0.01
Haití	0.03	0.01	-0.02
Jamaica	0.04	0.04	0.00
Trinidad / Tobago	0.10	0.04	-0.06
Guyana	0.02	0.01	-0.01
Panamá	0.10	0.05	-0.05
Suriname	0.02	0.01	-0.01

Fuente: CAN 2000.

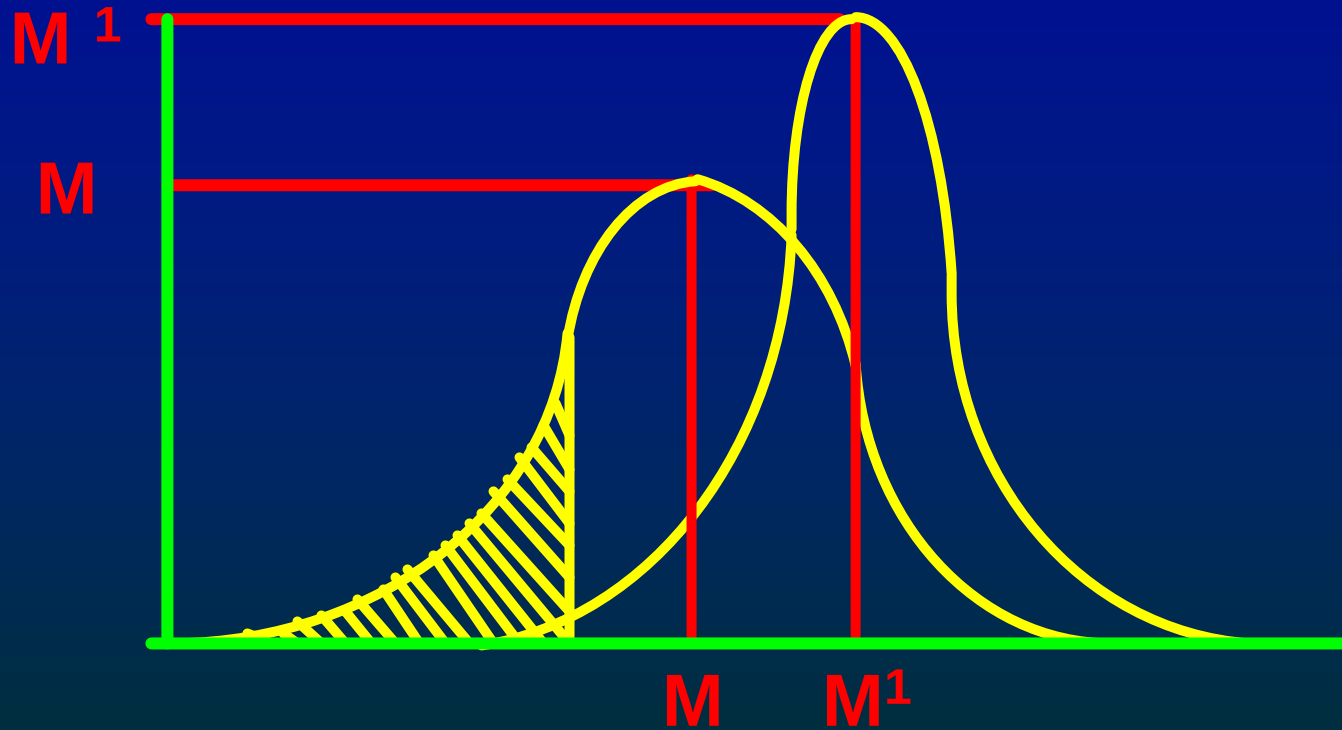
FASES DEL PROCESO DE AJUSTE.



FASE 1 : DESTRUCCION DE EMPLEO EN PLANTAS 'VIEJAS'
FASE 3 : EXPANSION A PARTIR DE PLANTAS 'NUEVAS'.



MEJORAS DE PRODUCTIVIDAD, 'MUERTE' Y 'NACIMIENTO' DE EMPRESAS.



PROCESO DE REESTRUCTURACION INTRA-SECTORIAL

AMÉRICA LATINA: COMPOSICIÓN DEL VALOR AGREGADO INDUSTRIAL 1970-2003

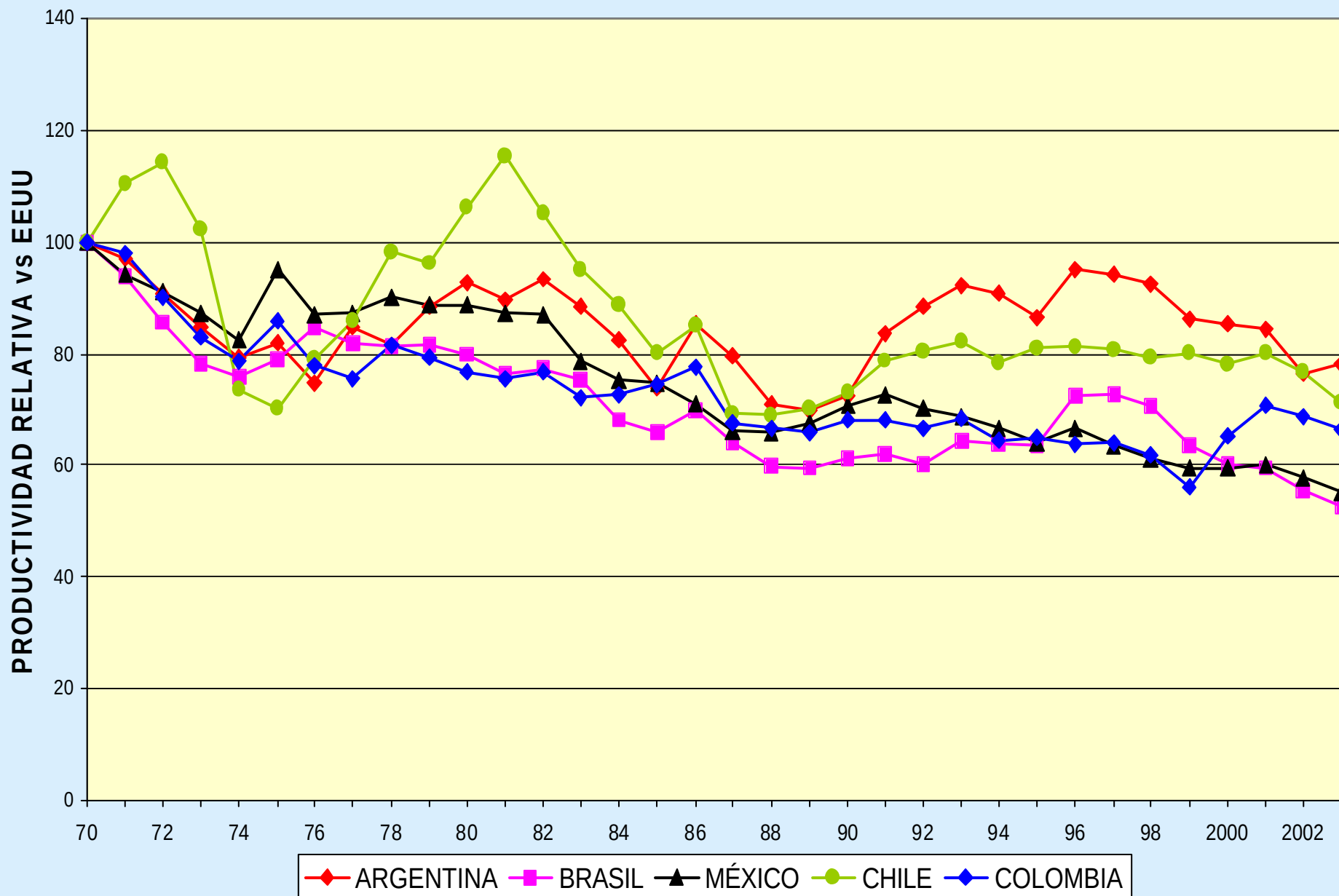
[illegible]

UN CASO PROTOTIPICO: LA INDUSTRIA DE SOJA EN ARGENTINA.

	Número de plantas (número)	Personal contratado (número)	Volumen de producción (Ml. Ton)	Ton / planta (Ml. Ton)	Ton / hombre (Ton)
1973-74	67	6 895	1 740	26	252
1993-94	59	4 934	12 196	207	2 472

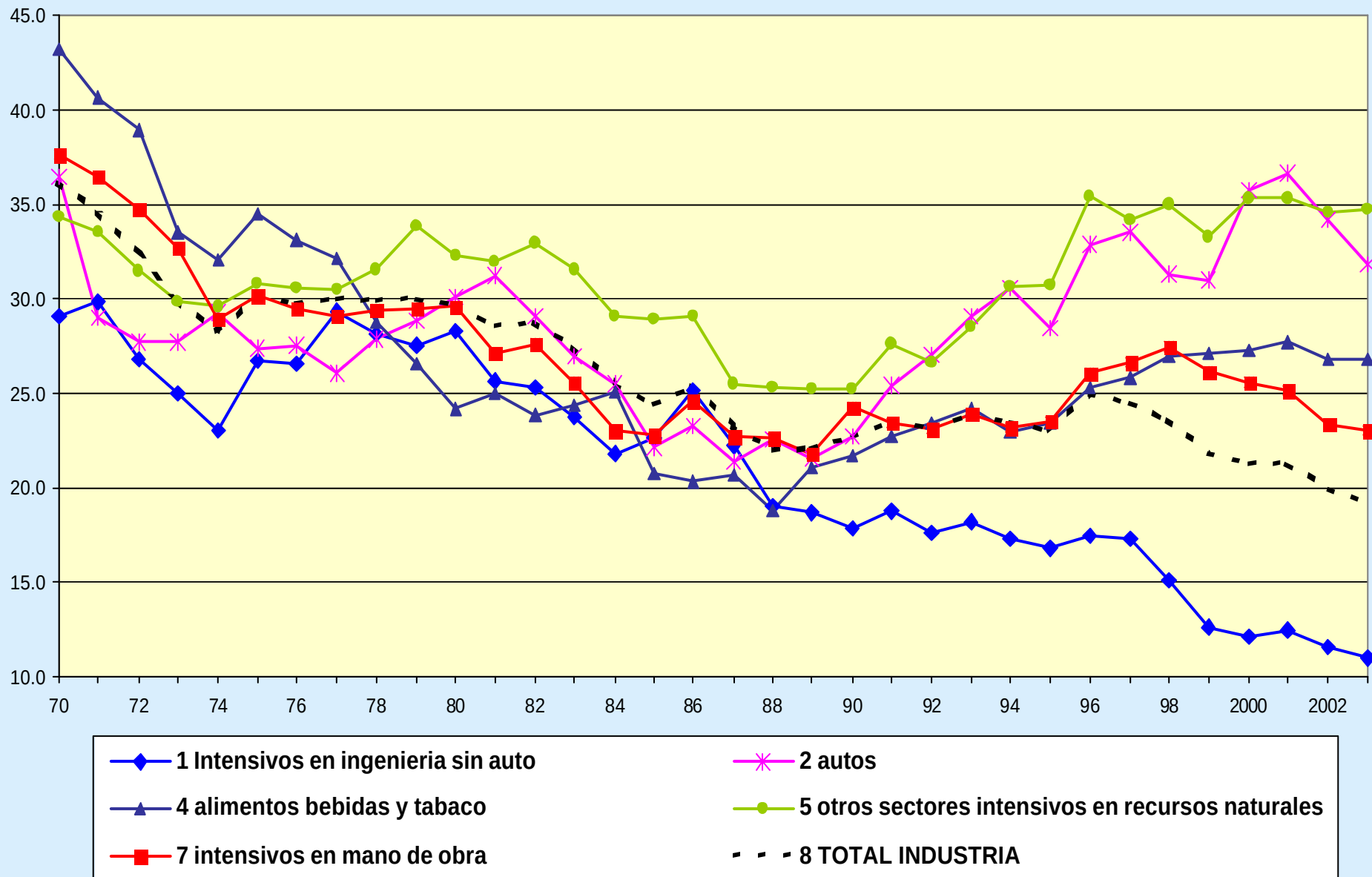
•MENOS FIRMAS, MAYOR PRODUCTIVIDAD

INDICE DE PRODUCTIVIDAD RELATIVA vs EEUU (1970=100)



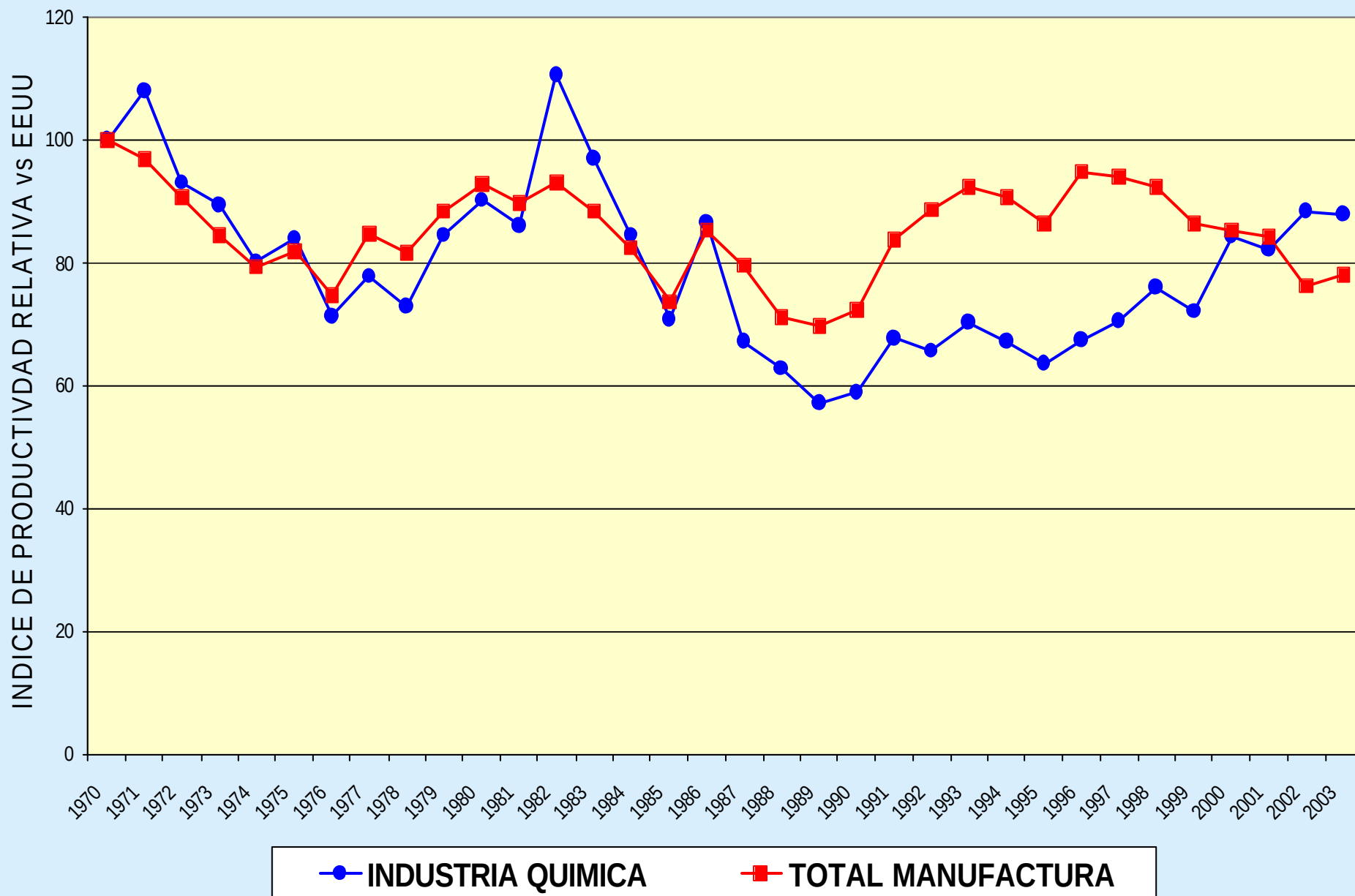
PRODUCTIVIDAD RELATIVA AMÉRICA LATINA vs EEUU

1970-2003 POR INTENSIDAD TECNOLÓGICA

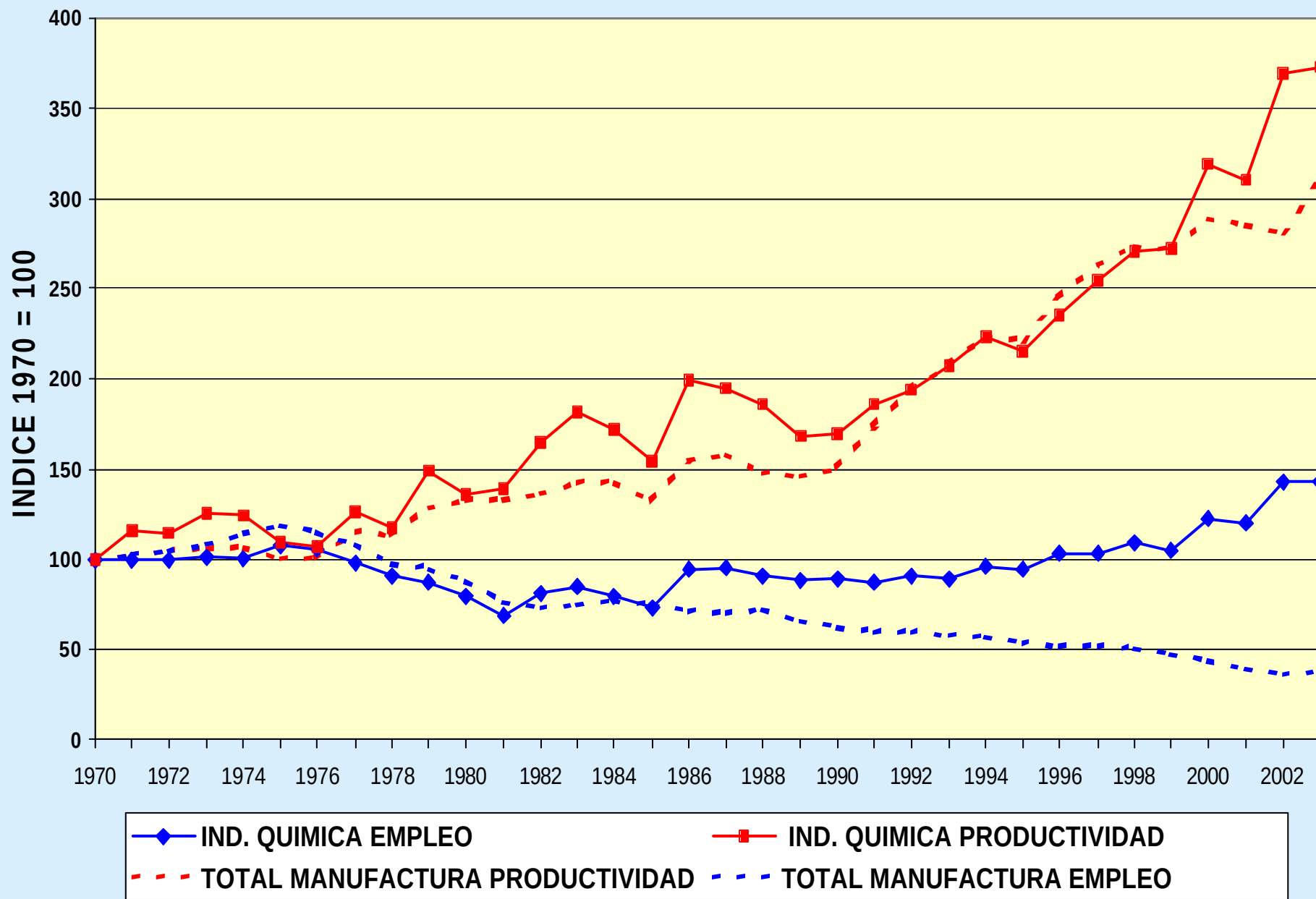


Índice de Productividad Relativa Argentina vs EEUU

Total Manufactura y Química 1970-2003 (1970=100)

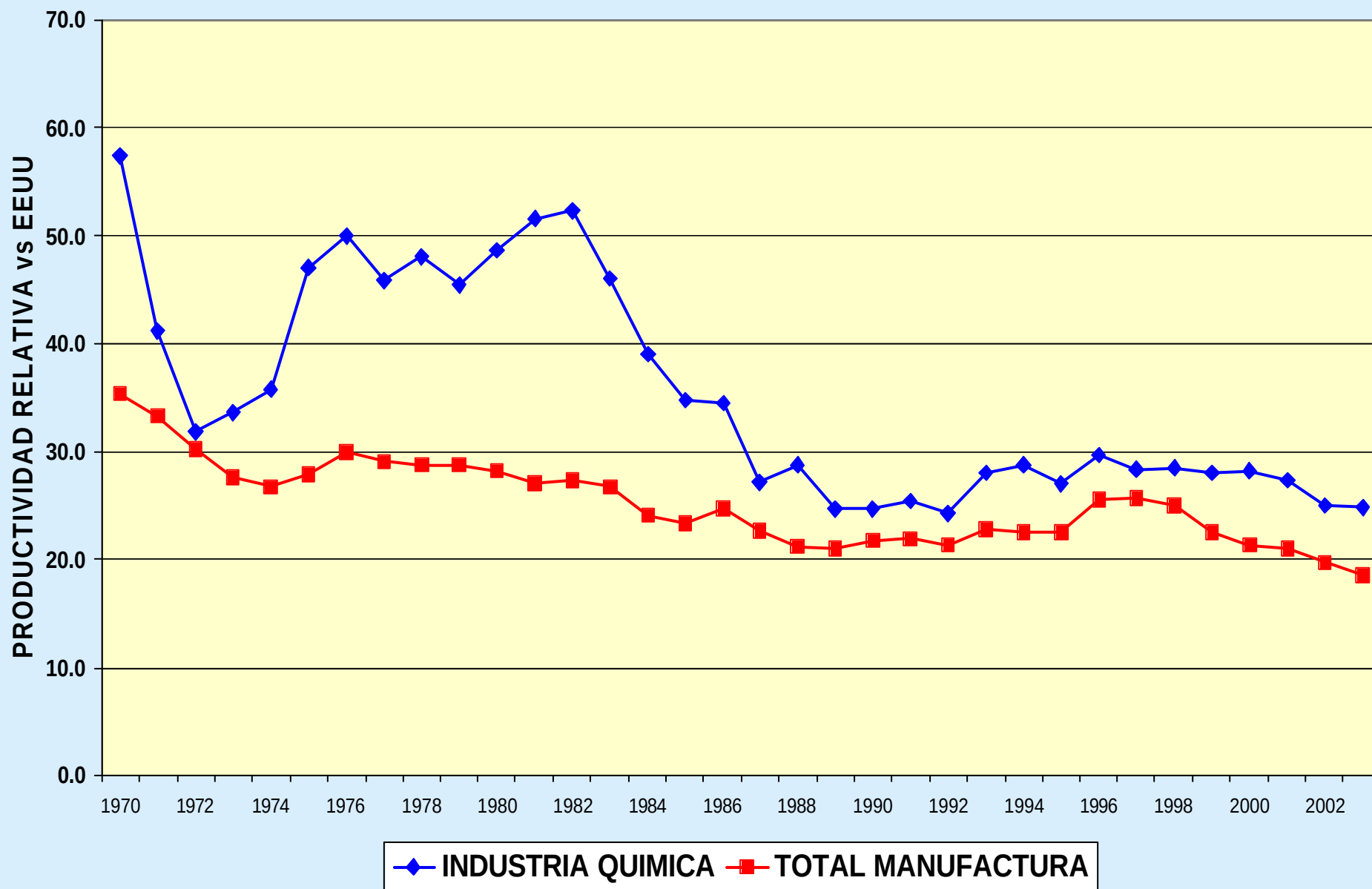


ARGENTINA: PRODUCTIVIDAD Y EMPLEO EN LA INDUSTRIA QUIMICA Y EN EL TOTAL MANUFACTURERO (1970=100)



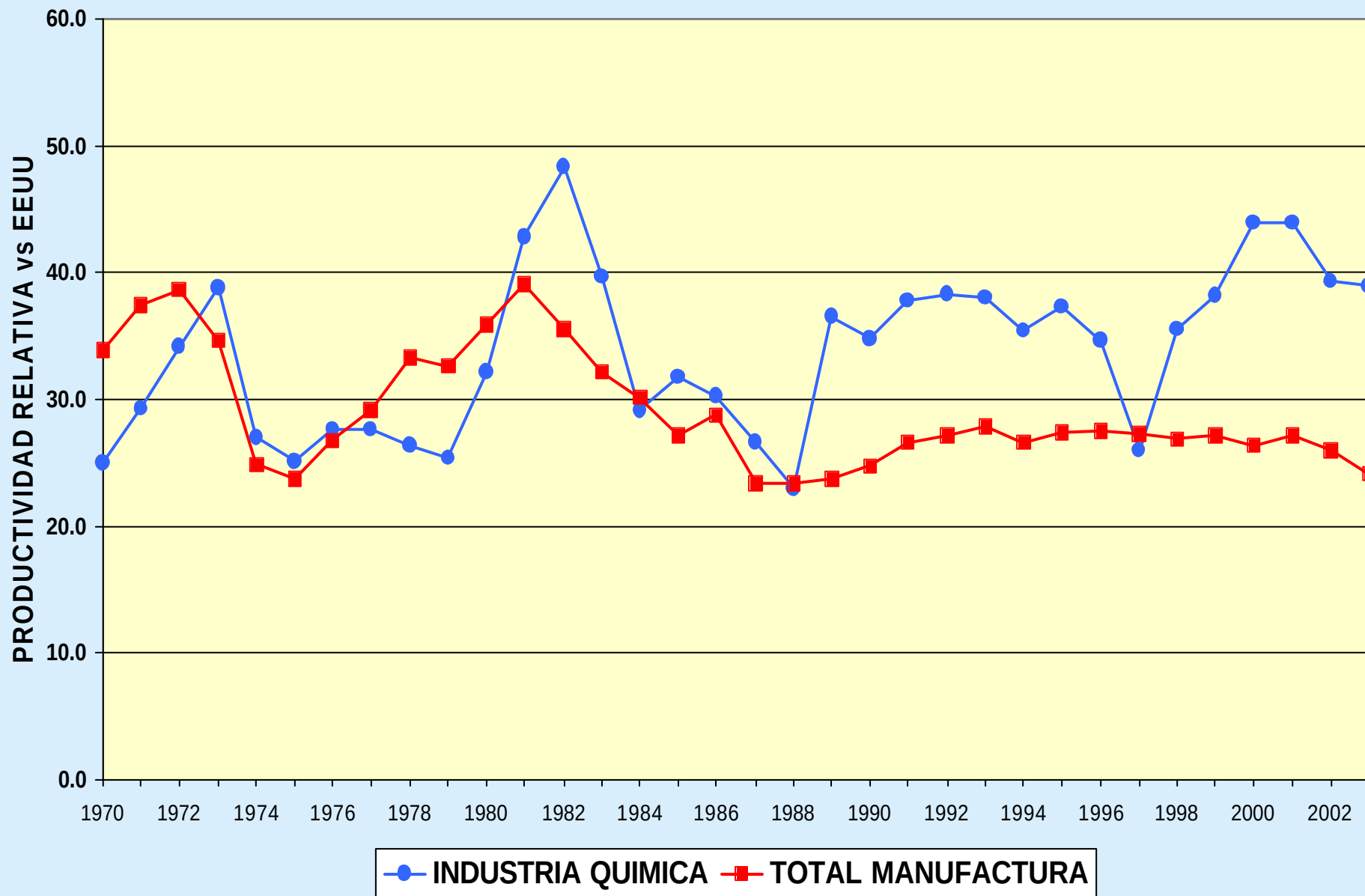
BRASIL: PRODUCTIVIDAD RELATIVA vs EEUU 1970-2003

TOTAL MANUFACTURA E INDUSTRIA QUÍMICA



CHILE: PRODUCTIVIDAD RELATIVA vs EEUU 1970-2003

TOTAL MANUFACTURA E INDUSTRIA QUÍMICA



GASTOS DE INVESTIGACION Y DESARROLLO COMO% DEL PRODUCTO. 1990-1999.

Country		1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Argent.	R&D							0.42	0.42	0.42	0.47
Bolivia	R&D				0.39	0.39	0.33	0.33	0.32	0.29	0.29
Brazil	R&D	0.58	0.59	0.48	0.61	0.74	0.87	0.91			
Chile	R&D	0.51	0.53	0.58	0.65	0.66	0.65	0.66	0.65	0.62	0.63
Colom	R&D					0.37	0.39	0.41	0.41		
C.Rica	R&D	0.73	1.05	1.22	1.42	1.23	1.25	1.13			
Cuba	R&D	0.72	0.65	1.13	0.93	0.82	0.77	0.61	0.70	0.87	0.83
Ecuad	R&D							0.09	0.08	0.08	
Mexic	R&D					0.29	0.31	0.31	0.34		
Peru	R&D								0.06		
Urug	R&D	0.25	0.15	0.19	0.07	0.14	0.28	0.28	0.42	0.23	0.26
Venez.	R&D	0.37	0.39	0.49	0.47	0.39	0.48	0.29	0.33		
Canad	R&D	1.45	1.51	1.56	1.60	1.65	1.62	1.57	1.59	1.61	1.50
Espana	R&D	0.89	0.87	0.91	0.91	0.85	0.85	0.87	0.86	0.89	0.90
USA	R&D	2.62	2.69	2.61	2.49	2.39	2.48	2.52	2.55	2.59	2.67

Source: RICYT, (2000) and Inter-American Development Bank, 2001.