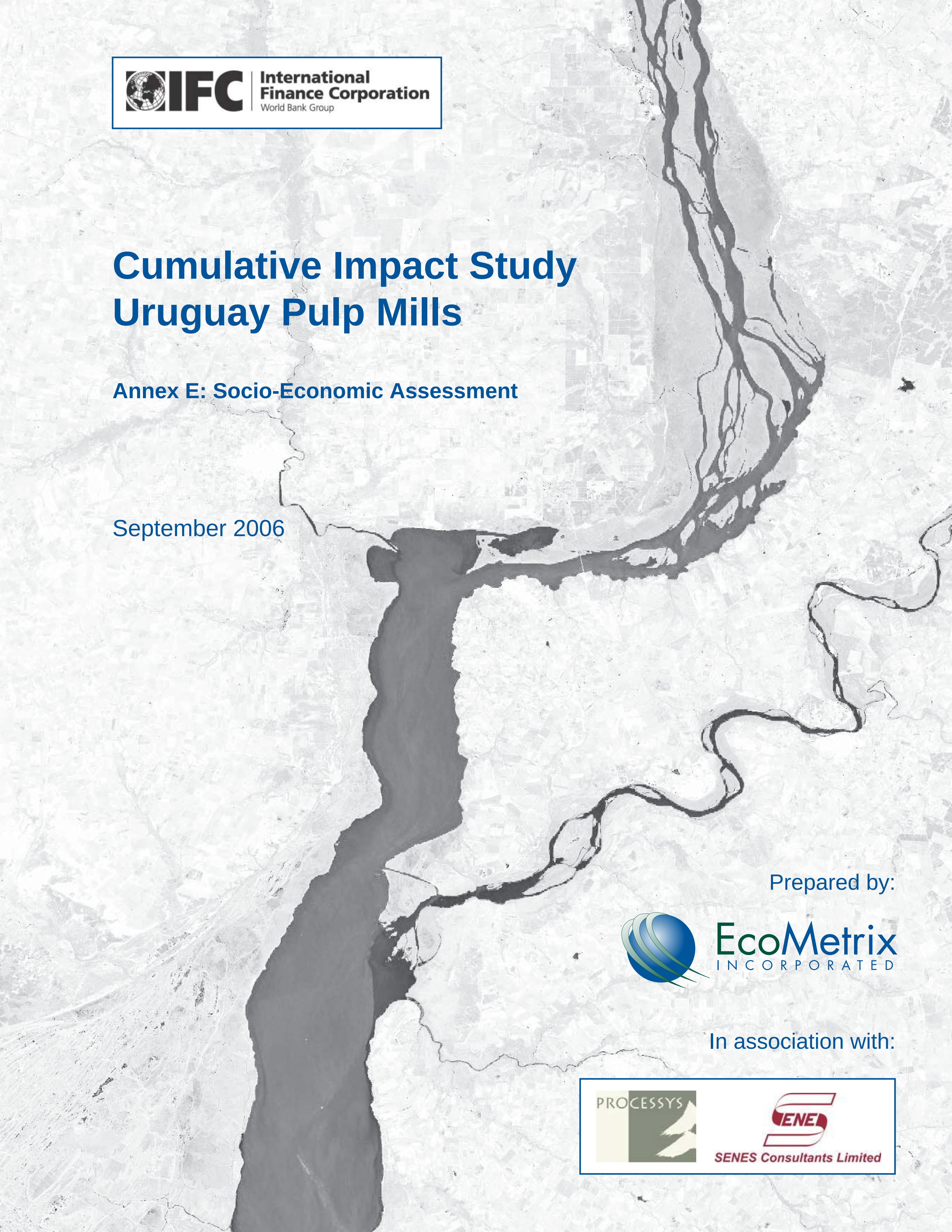

International Finance Corporation
World Bank Group

Cumulative Impact Study Uruguay Pulp Mills

Annex E: Socio-Economic Assessment

September 2006

Prepared by:

EcoMetrix Incorporated

In association with:

Processys

SENES Consultants Limited

ANNEX E

Socio-Economic Assessment

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E1.0 INTRODUCTION

This Cumulative Social-Economic Impact Assessment has updated the original draft Social Impact Assessment (November 2005) prepared by PCI Americas and Malcolm Pirnie. This study updates key findings of the original draft assessment and provides additional social and economic information collected from:

- Environment Impact Assessments previously prepared by the Companies for their individual projects;
- updated information provided by the Companies including Botnia's July 2006 Monitoring Report, and ENCE's Social and Environmental Plan (August 2006);
- the Expert Panel Report;
- the Economic Impact Assessment (November 2005);
- HCG Environment Consultants (HCG), Socio-Economic Study of the Impacts of the ORION Pulp Mill Project, Helsinki, Spanish version May 2004, English translation June 2004;
- Tea, Deloitte, Touche (TDT), Economic Impact Study of the M'Bopicuá Pulp Mill (CMB), Montevideo, November 2003;
- Tea, Deloitte, Touche (TDT), Update of the Economic Impact Study of the M'Bopicuá Pulp Mill (CMB), Montevideo, January 2005;
- CMB, Feasibility Study, M'Bopicuá Pulp Mill Project, 2004;
- The Strategy for the Sustainable Development of Gualeguaychú and the Impacts of Fray Bentos Pulp Mills. Héctor Sejenovich, Advisor of Asamblea Ciudadana Ambiental de Gualeguaychú;
- The Tourism Assessment of Gualeguaychú in the Province of Entre Ríos Argentina and Fray Bentos in the Department of Río Negro Uruguay (April 2006); and
- Interviews conducted in Uruguay and Argentina in July 2006 by the Project Team.

SENES Consultants Limited project team members, Gwen Brice (Canada) and Ana Luisa Covarrubias (Chile), traveled to Uruguay in July 2006 and conducted several interviews in Montevideo, Fray Bentos, Paysandú and Gualeguaychú in order to collect site-specific information. During their visit they met with the following individuals/groups:

- Intendencia de Río Negro: Dr. Omar Latluf, Intendente Río Negro
- Director de Turismo, Río Negro, Lic. Ricardo Laurenz Espalter
- Director General de Planificación, Río Negro. Arq. Gonzalo Lazcano
- Directora de Educacion y Cultura, Río Negro. Graciela Beatriz Espina
- Translados Nacionales e Internacionales: Mr. Nilo Alvarez Silva.
- Botnia: Mr. Timo Piilonen, Mr. Carlos Faroppa, Mr. Gervasio González, Mr. Olli Ahava, Mr. Nicolas Cervino, Mr. Bruno Vuan.

- Industrial and Commercial Association of Río Negro: Mr. Leopoldo Cayrús, President; Ms. Cristina Somosa, Treasurer; Mr. Ramiro Sugasti and Ms. M. Eugenia Martínez.
- CMB – ENCE: Mr. Enrique Puricelli, Mr. Emilio Rodriguez Perez, Ms Mara Rubinos
- Departmento de Sociología Universidad de la Republica: Profesor Enrique Mazzei (ENCE SIA).
- Forestal Oriental S.A. (FOSA): Mr. José P. García de León in Paysandú.
- Beekeepers Association (CALAPIS): Mr. Mauro Nocito, General Manager in Paysandú
- Economista Pedro Barrenechea (Botnia EIA)
- Economista Carolina Ferreira (Botnia EIA)
- Sociologist Mr. Enrique Gallicchio (Botnia SIA)
- Ñandubaysal Resort: Mr. Oscar Rolón

The Cumulative Impact Study is defined as the analysis of all the effects (environmental, social and economic) caused by the activities associated with the two pulp mills in the department of Río Negro and their wood supply initiatives in the department of Paysandú. The area of influence defined for the purposes of the Social Impact Study includes the departments of Río Negro, Paysandú and Soriano in Uruguay and the City of Gualeguaychú in the Province of Entre Ríos in Argentina.

The report organization is as follows;

Section E1.0	Introduction
Section E2.0	Uruguay social profile and summary of baseline data. This section provides a summary of the key social indicators for the Department within the area influence, namely, Río Negro, Paysandú and Soriano.
Section E3.0	Argentina social profile and summary of baseline data. This section provides a summary of the key social indicators for the Province of Entre Ríos and specifically for the City of Gualeguaychú.
Section E4.0	Profile of Key Livelihoods. This section identifies those transboundary key livelihoods, dependent on natural resources that are of concern within the area of influence. Key livelihoods include farming, fishing, forestry, beekeeping and tourism.
Section E5.0	Cumulative Impacts. This section identifies and discusses cumulative impacts for both the construction and operations phases of the mills. Transboundary impacts are discussed.
Section E6.0	Conclusions and Recommendations
Section E7.0	References. This section includes a list of reports and websites referenced.

E1.1 Specific Objectives

The specific objectives of the social impact study include:

- To first provide a base-line socioeconomic and demographic profile of the existing situation within the areas of influence, prior to the completion of construction of the pulp mills; which will allow the monitoring of the different indicators through time, and allow comparison of the situation during construction and operation phases of the projects.

- To determine the possible social impacts that the execution of both projects will produce in the area of influence of the projects, including impacts on health, education, housing, quality of life and public security. The area of influence includes the departments of Río Negro, Soriano and Paysandú in Uruguay and the Department of Gualeguaychú in the Province of Entre Ríos, Argentina. The greater area on the Uruguayan side of the Uruguay River is due to the fact that the areas of wood supply for the mills are included in the area of influence.

- To identify monitoring indicators and a program that involves both companies and the appropriate local services and officials.

E1.2 Challenges with Data Collection

Data collection for the original draft cumulative impact assessment was inhibited by the opposition's strategy to not participate in the cumulative impact assessment process. Key stakeholder representatives in Gualeguaychú refused to become engaged in the consultation and data collection process, thus resulting in a reliance on published data from government internet sites and other secondary sources.

Since the original social impact assessments have been completed by both Botnia and ENCE, Botnia has commenced construction; Argentina applied to the International Court of Justice to stop construction based on the claims that Uruguay violated the terms of a bilateral treaty governing the use of the Río Uruguay; and, based on fears that the pulp mills will cause long term environmental and economic damage, residents from the City of Gualeguaychú and elsewhere launched an aggressive opposition campaign which included a three month long blockade of the International Bridge connecting Fray Bentos and Uruguay with Gualeguaychú and Argentina.

All of these events have potentially influenced the collection of data to update this Cumulative Impact Assessment. During interviews with Río Negro Government officials, it was stated that the relationship traditionally between Fray Bentos and Gualeguaychú has been very amicable. Residents cross back and forth between the two communities for social, business, and commercial activities. It is not uncommon to find relatives on both sides of the river. Today, however, this relationship has been severely strained. It was reported during our interviews that Uruguayan family members living in Gualeguaychú felt ostracized and discriminated against by their Argentine neighbours.

The conflict with Argentina has resulted in economic losses locally, regionally and nationally. Uruguay undertook litigation through MERCOSUR against Argentina requesting compensation for those economic losses. During one interview the bridge blockade was referred to as the "Argentina crisis".

E2.0 URUGUAY SOCIAL PROFILE AND SUMMARY OF BASELINE DATA

E2.1 The Departments of Paysandú, Río Negro, and Soriano

Table E2.1: Population, Density, and Growth Rate, 2004

Department	Population (approximately)	Density hab/km^2	Growth Rate
Paysandú	110,244	8.1	0.466
Río Negro	53,989	5.7	0.509
Soriano	84,563	9.3	0.602

Source: INE, 2004
INE, Uruguay in Numbers 2005

Combined, the three departments of the area contain a population of 249,796 people. Río Negro with the lowest population also experiences the lowest density of habitants per kilometre and the lowest growth rate. Soriano is the department with the greatest population density with 9.3 inhabitants per square kilometre; followed by Paysandú with 8.1.

The distribution of men to women in the urban areas for each of the three Departments is similar with slightly more women reported than men. In contrast, in rural areas of the three Departments, men significantly outnumber women. For example, in Paysandú rural areas, 62% of the population are men and 38% are women.

In the three Departments, the population is concentrated in the cities with approximately 9 out of 10 people residing in the larger cities within the Departments of Paysandú, Río Negro, and Soriano. For each Department, 55% of its population resides in the capital city (Paysandú, Fray Bentos and Mercades, respectively).

The population of these Departments shares the national characteristic of being an aging population, with 12%, 11% and approximately 11% of the populations of Paysandú, Río Negro and Soriano, respectively, over the age of 65. Approximately half of the population of each department is 30 years or older. In the younger ages, there is a greater percentage of men than women, in the upper end of the age distribution, this relation is reversed.

The National average life expectancy age is 75 years with the average for men at 71 years and the average for women at 79 years. The three Departments also experience similar life expectancy rates for both men and women as the National average.

The population growth projected for the year 2020 will be 5% for Paysandú and a little over 10% for Río Negro and Soriano. A decrease in the number of inhabitants residing in the rural areas is forecast, following the clear national and global trend of urbanization of the population.

E2.1.1 Community Profile: Fray Bentos

Founded in 1859, the history of Fray Bentos is intertwined with the development of a meat processing plant by the British. The plant, Anglo del Uruguay (Anglo), was originally the called the Liebig Extract of Meat Company and opened in 1866. It was ranked among the largest industrial complexes in South America and played a major role in the development of Uruguay's cattle sector. In 1873 it started to produce "Fray Bentos Corned Beef", a label that quickly became well known in Western Europe. As a result of the economic success of the processed meat in the European market, Fray Bentos became a major centre for innovations in Uruguay. For example, in 1869 the first hydraulic pump in Uruguay was installed at the meat processing plant. In 1873 the first steam-powered plough arrived and, in 1883 for the first time in the history of the country, electric power was used at the facility. In 1924 the plant was bought by the Vestey group of England and renamed to Anglo.

Figure E2.1-1: Anglo Commemorative Plaque Fray Bentos Golf Club

Fray Bentos experienced a boom to its economy and at its peak the plant employed 5,000 people. As Anglo grew, the infrastructure to support it also grew including the development of a hospital, school, and worker housing. Another legacy of the Anglo 'boom' days is the municipal golf course located between the core urban area and the meat processing site. The golf course supports a club house, two outdoor tennis courts, a squash court and a grounds-keeper cottage.

Due to declining markets and new manufacturing advances in Europe, Anglo ceased its operations in 1971. The Uruguayan government continued to operate the processing plant until its closure in 1979.

Predominately a single-industry town, the closure of the meat processing plant was devastating for the community of Fray Bentos. As conveyed during interviews, it was not unusual for two or even three generations of a family to be employed at Anglo. Closure of the plant left many families without an income; consequently, the community entered into a 'bust' scenario with a reliance on government pensions, out- migration of workers and youth, degradation of infrastructure, and little economic investment in Fray Bentos.

The community of Fray Bentos is very proud of Anglo and their meat processing past. The plant has been converted into a museum depicting the history of the industry. Other support services available include a restaurant and artisan-souvenir shop as shown in the attached photographs. The grounds make up part of the public parklands along the Uruguay River where horses and cows are permitted to graze freely.

This history of foreign investment in the community and single-industry reliance has shaped the development and attitudes of Fray Bentos in the last forty years. Interviews with local government and with sociologist professors/professionals provided anecdotal information on the history of Fray Bentos. All referred to Fray Bentos as a community "waiting for something" or an "expectant community". Several attempts were made over the years to attract foreign investment in an attempt to reopen the meat processing plant, or to utilize the property in some sort of tourism capacity. Both attempts failed, leaving the community disappointed. When Botnia and ENCE announced their plans, the community initially reacted with cautious optimism.

Development of tourism resources has been focused on the Town's history as a prosperous meat processing industry town. The official plan provided by Fray Bentos, identifies their tourism area to be located long the river encompassing the golf course, the Anglo site and beach areas. One of the conclusions from the 1994 Río Negro tourism study was quoted in a submission from the Gualeguaychú Environmental Assembly (in Spanish, Asamblea Ciudadana Ambiental de Gualeguaychú - ACAG), stating that a pulp mill located at the Anglo site would result in tourism disappearing from the region. According to the official plan and information provided during interviews with the Planning office, this conclusion of the tourism study reflected the planning designation for the area and its lack of compatibility with industrial land uses. It was not the intent of the conclusion to imply that a pulp mill specifically, would devastate the tourism efforts of Fray Bentos.

E2.1.2 Social Development

The original draft Social Impact Assessment (provided in Annex I) utilized several United Nations (UN) indicators or indexes to evaluate and describe the level of social development for the area of influence. The indicators measure quality of life, poverty, household income, infant mortality, and life expectancy.

Figure E2.1-2: Re-Developed Anglo meat processing plant. Now a designated tourist designation

Figure E2.1-3: Fray Bentos: Public Grazing Area at Alga Site

In terms of the quality of life, the indicators show that the three Uruguayan Departments in the area of influence are similar as reflected in the relatively low infant mortality rates and high life expectancy rates at birth. This combination of low infant mortality and high life expectancy is evidence of an acceptable level of health care and nutrition. Compared to other Latin American countries, Uruguay's indicators surpass the average and approach those of more highly developed countries.

The average monthly income (in Uruguayan pesos) per household is smaller in Río Negro than in other Departments (11,178 in Paysandú, 9,280 in Río Negro and 12,666 in Soriano). These averages are lower than the national average and lower than the average monthly income per household in the capital.

Comparatively, Paysandú and Soriano have a slightly higher rate of poverty and a higher percentage of its population living with unsatisfied basic needs, than Río Negro. 32%, 27% and 17%, respectively, of the population live with unsatisfied basic needs.

E2.1.3 Education

The educational profile of the population in the area of influence of the project does not differ substantially from the characteristics of the rest of country. The percentage of people who have never attended school is low, with less than 1% in Paysandú, 1.5% in Río Negro, and 2.3% Soriano. The majority of persons 14 years of age or older have attended primary school in all three Departments; however, in technical and higher level education Río Negro lags significantly behind Paysandú and Soriano.

The majority of the educational institutions in the departments are public. In the city of Fray Bentos, the city closest to the mill sites, and where the majority of people will be concentrated, the public sector has 24 public schools (17 urban and 7 rural), 2 grammar schools, 2 schools of professional technical education (a Technical School and one Agrarian school) and an institute to train teachers. Most of the urban schools, the high schools and the Agrarian School, have full capacities. The private education sector consists of a primary school and a college with primary and secondary education up to the fourth year. Its capacity is underutilized, and is able to accept double the number of students.

E2.1.4 Employment

The economically active population of Paysandú is relatively low at 59.4% , compared to 43.7% for Río Negro, and 59% for Soriano.

The unemployment rate for Río Negro is the lowest in the area of influence. The departments of Soriano and Paysandú, have an unemployment rate higher than the national average at 16.9% in Soriano and 16.2% in Paysandú. In Paysandú and Soriano, unemployment affects 10% of women compared to 6% of men.

The unemployment situation is greater in the population younger than 30 years.. In Paysandú and Soriano, the rate of unemployment of those younger than 20 years reaches figures higher than 40%. Río Negro is in a slightly better situation than those of the other departments, as its unemployment rates are considerably lower in all age groups.

The majority of those working are employed by private-sector companies or government: 72.1% in Paysandú, 57.3% in Río Negro, and 65% in Soriano. The remainder are self-employed: 23.3% in Paysandú, 38.8% in Río Negro and 28.1% in Soriano. The services sector employs the largest number, where approximately 7 out of 10 persons are employed.

The economy in Río Negro is dependent on agricultural activities including food product processing and warehousing in Young. The Municipality of Mercedes in Soriano has an active economy dependent on agriculture activities including cattle and cash crops (soya, sunflower). Paysandú is more of a traditional industrial centre involving agro-processing and various other types of industry (Botnia 2004).

E2.1.5 Health

Health care services in Fray Bentos include one sanatorium with 26 beds and 54 doctors; one private policlinic with 26 doctors; one public hospital with 70 beds, 56 doctors and a capacity to serve 25,000; and three public polyclinics (PCI America and Malcolm Pirnie, 2005).

Data is provided in the November 2005 Cumulative Social Impact Study (Annex I) that addresses incidence of various social diseases such as HIV and Aids. The incidences of both are low within Paysandú, Río Negro and Soriano, and are considerably below the national rates. The most recent HIV/AIDS studies showed a decrease in the rate of growth of infection among the economically active population of the country during the last three years.

Data provided in Annex I indicate that 891 minor traffic accidents occurred per 100,000 inhabitants in Paysandú, 518 in Río Negro, and 378 in Soriano. The number of fatal traffic accidents is highest in Río Negro with 11 fatalities per 100,000 inhabitants recorded for 2003. The highest occurrence of minor labour accidents occurs in the Department of Paysandú. Recorded labour fatalities for 2003 in Río Negro and Soriano is zero per 100,000 inhabitants.

E2.1.6 Public Security

The incidence of crimes against property are more frequent in the Department of Río Negro than the other Departments. The related statistic of crimes against people in these different categories, are lower in the department of Paysandú, and twice as many in the Department of Soriano.

E2.1.7 Housing

As reported in the original Botnia EIS, the housing supply in Fray Bentos is limited. The Mortgage Bank of Uruguay (BHU) has experienced an increase in activity since January

2005. According to the report, the BHU Fray Bentos office had 20 houses and 9 properties available. Rental properties are also in limited supply.

E2.1.8 Transportation

The Road Directorate (Direction de Vialidad) of the Ministry of Transport and Public Works is responsible for the construction and maintenance of the national road network; the departmental (or secondary and tertiary) roads are the responsibility of the respective municipalities. Forest roads and their maintenance are the responsibility of the individual owners. The current state of the country's road network presents limitations in supporting the development of the forestry sector and its transportation needs.

Both Botnia and ENCE have constructed their own dedicated access road to their sites that connect directly to the national highway network.

Considered a gateway for forestry products export from Río Negro and the north-eastern region of Uruguay, the port of Fray Bentos plays an important role in the movement of eucalyptus wood, cereals and citrus. Shipments have declined at the port since 1999 despite the increased volume of wood exports from 1999 to 2003 (Botnia 2004).

Located 12 km upstream from Fray Bentos, the port at the ENCE CMB mill site (formally called Terminal Logística M'Bopicuá or TLM) was formally inaugurated in 2003 after a two year construction period (see Figure 2.1-5). The TLM is a transportation hub that includes a harbour, a road linked to the national highway system and the potential to link to the Uruguayan railway network (ENCE 2004). Raw materials (wood) are stored and processed in the chipping mill adjacent to the port.

The Uruguay railway system had been practically abandoned; however, a commitment has been made by the government to revitalize the railway to service the transportation of raw materials from the plantations to Fray Bentos.

E2.1.9 Landscape and Visual Setting

The Departments of Paysandú, Río Negro, and Soriano are located on the western border of Uruguay along the Río Uruguay. The landscape is one of rolling agricultural lands, dotted with small communities and towns that vary in size and composition. In the Department of Paysandú, forestry plantations at varying growth stages dominate the landscape. Figure E2.1-6illustrates a typical view of plantations along Highway 3.

Adjacent to the City of Fray Bentos, the landscape in the area of the mills is predominately rural, with much of the land in use for agricultural purposes. The ENCE land holding includes a nature reserve south of its development site that includes both meadows and forest. The International Bridge into Argentina is located adjacent to the Botnia site.

Figure E2.1-4: Plantation in the Department of Paysandú

Figure E2.1-5: ENCE Port on the Uruguay River

E3.0 ARGENTINA SOCIAL PROFILE AND SUMMARY BASELINE DATA

E3.1 Province of Entre Ríos and the Department of Gualeguaychú

E3.1.1 Demographic Characteristics

The department of Gualeguaychú contains about one-tenth of the total population of the province of Entre Ríos (1,154,618). It has a population of approximately 101,350 similar to that of the Department of Paysandú, and 40.3% of the total population of the area of influence (PCI Americas and Malcolm Pirnie 2005).

The population growth during the 1991-2001 period was approximately 11%, surpassing considerably the growth in the Uruguayan departments. After a period of population stagnation between the years 1957 and 1970 a population increase occurred, as recorded in the 1980 census. After another decade of stagnation a similar growth was repeated between the years 1991 and 2001.

The concentration of population is also higher than that of the Uruguayan departments on the other side of the Uruguay River. Its population density is 14.3 inhabitants per square kilometre, whereas Soriano recorded 9.3, the highest figure of the three Uruguayan departments.

In Gualeguaychú there is a slight predominance of women, a similar distribution to that in Paysandú and Soriano in the Uruguayan area of influence.

Gualeguaychú, as well as Entre Ríos Province follows the same tendency of decreasing rural population as the Uruguayan departments. In absolute terms, Gualeguaychú shows a stabilization of its rural population between the years 1991 and 2001. In relative terms, there also was an increase of the urbanization of the department. The percentage of rural population (approximately 11.6%) is larger than in the Uruguayan zone of influence.

The population distribution per age group shows a similar profile to that of the Uruguayan departments. A relatively aged population, with a high percentage of the older age groups of the population as a whole, is observed. Over half of the population is 30 or older. The low birth rate (17.3) and mortality rate (7.70) confirms the characteristics of the population of the region as one of low population density.

The population growth projected for the year 2010 is 2.7% in the Province of Entre Ríos. Specific data for Gualeguaychú are not available, but in view of the annual average rate of growth, and the growth verified in the last census period, it may be assumed that it will surpass the figure estimated for the entire Province of Entre Ríos.

E3.1.2 Community Profile: Gualeguaychú

Information provided in this community profile of Gualeguaychú was presented in the submission *The Strategy for the Sustainable Development of Gualeguaychú and the Impacts of the Fray Bentos Pulp Mills,* prepared by the Asamblea Ciudadana Ambiental de Gualeguaychú (ACAG) and coordinated by Dr. Hector Sejenovich. This document was submitted to IFC during the period of public consultation following the release of the draft Cumulative Impact Study.

As the title suggests much of the focus of the paper indicates the author's view on the conditions and activities necessary to develop a sustainable and economically thriving community. The city prepared the *Gualeguaychú Strategic Plan* (2004-2005) which identified the importance of natural resources to continued growth in tourism and agricultural industries. When this Strategic Plan was under development the public were actively engaged through symposiums, debates and discussions. The Sejenovich report identifies that the general population of Gualeguaychú has adopted a sustainable development lifestyle. It is also pointed out that the curriculum at all levels of education includes environmental issues.

It is not surprising then that the ACAG was formed to oppose the pulp mills based on the perception that the cumulative air and water impacts of the mills will harm human health, farming activities, beekeeping activities, the fish industry and tourism.

The Sejenovich *et al*. report identifies 480 organizations registered with the Registry of Civil Society Organizations. These organizations fall into the following classifications: commercial activities (22), sports (43), recreation (8), education (48), trade unions (24), research (1), mutual assistance (3), professional (16), religious (29), health (36), social (6), socio community (33), cultural (40), neighbourhood (170), and environmental (1).

Similar to Fray Bentos, industry plays an important part in development and is identified in the Gualeguaychú strategic plan as a key aspect to sustainable development. The Gualeguaychú industrial park is strategically placed to service Buenos Aires, Uruguay, Brazil and Paraguay. The park is fully serviced with water, natural gas, electricity, communication centre, health centre, fire prevention system and a bus line with regular service to the City. According to the Sejenovich report, there are currently 27 industries operating in the park with five other future industries planned. These industries are provided with provincial tax exemptions such as the Gross Receipts Tax, Land Tax and the Car Tax. Municipal tax exemptions are also offered.

E3.1.3 Social Development

The UN Index of Human Development assumes relatively high values in Argentina and Entre Ríos in particular, although lower than the Uruguayan values in the area of influence. Entre Ríos Province shows a lower value than that of the whole of Argentina.

As in the case of the Uruguayan departments, these figures are greater than the Latin America average (0.749), and are similar to those registered by countries of high human development (0.879).

The infant mortality indicator is very sensitive to sanitary conditions and poverty levels of the population. Although the figure (15.3) is relatively low compared to those of Río Negro and Soriano, an increase of the neonatal mortality occurs in 2002 and of post neonatal mortality in 2003 (PCI Americas and Malcolm Pirnie 2005).

Another important element to consider is life expectancy at birth. The figures for Entre Ríos province are similar to those of the Uruguayan departments, observing a greater life expectancy in women than in men (approximately 7 years higher).

In of Gualeguaychú, 11.3% of all households have unsatisfied basic needs (e.g. lack of sanitary services, crowding); when compared to the total for Entre Ríos Province (14.7%). This percentage has been decreasing constantly since 1980.

The majority of the population of Gualeguaychú has access to the water supply system, in a sustained area of coverage, which is rated better in Entre Ríos than in the rest of the country. The availability of electric energy is guaranteed for 97% of the population and the sanitary system reaches 66% of the population. According to Sejenovich *et al*., successive Gualeguaychú governments have focussed on decreasing poverty by eradicating fragile housing and extending basic drinking water and sanitation services to the whole urban area (Sejenovich *et al*. 2006).

E3.1.4 Education

As in the case of the Uruguayan departments there is a low percentage of illiterate individuals, with the rate higher for men (2.65% of the individuals of 10 years or older) than for women (1.97%). The majority of the population 15 years or older has completed primary or some secondary education. Less than 1 in 10 individuals has post-secondary studies or complete college studies.

E3.1.5 Employment

The department of Gualeguaychú has an economically active population of 53.8%, similar to that of the area of influence in Uruguay. The percentage of working population is lower among women.

The unemployment rate for 2001 is 27% for Gualeguaychú. This is higher than those of the departments of the Uruguayan side; however, this figure is for the year 2001, the year of the Argentine economic crisis.

As in the Uruguayan departments, the majority of those employed work for the private sector or government. Self-employed workers account for 22% of the employed workforce. Similar to the Uruguayan area of influence, the services sector employs 65.5% of the workforce.

E3.1.6 Health

Health care services in the Province of Entre Ríos include 604 clinic establishments, of which 150 are for out-patient services, and offering 6,751 beds.

In the department of Gualeguaychú a high percentage of the population (48.5%) is not covered by social security and/or a plan of private health coverage.

Data is provided in Annex II that addresses incidence of various social diseases such as HIV and AIDS. The incidence of both is low within the Province of Entre Ríos, and is below the national rates.

A recent decrease in traffic accidents, in the department of Gualeguaychú has been experienced in the period 1998 to 2003. A similar trend is reported for the incidents of injuries. In contrast, the number of deaths caused by traffic accidents remains practically the same for this time period.

E3.1.7 Public Security

The most frequent crimes in Gualeguaychú are crimes against property; that is 67% of the criminal acts including police officer intervention in the year 2003. The second most frequent are crimes against people which include 19.3% of the crimes recorded.

In Gualeguaychú, the rate of delinquency (per 10,000 inhabitants) has been increasing in recent years, reaching the figure of 241.6 in 2003. This figure is higher than for Entre Ríos Province (227).

E3.1.8 Housing

Gualeguaychú has 28,666 households, of which, approximately 80% experience good residential conditions (Sejenovich *et al*. 2006). The Federal Housing Program provides social housing to those living in poverty.

E3.1.9 Transportation

As reported in Sejenovich *et al*., the City of Gualeguaychú is strategically positioned in the transportation network. The transportation infrastructure includes ports, railways, and a national and departmental road network. Federal funding has contributed to road upgrades and improvements. The City has direct highway access to the Argentina capital, Buenos Aires, road access to the urban centre of Concorida and to Brazil, access to Uruguay through the General San Martin International Bridge with direct links to Montevideo, and direct connection with the Santa Fe-Paraná tunnel. This developed transportation network should enable Gualeguaychú to increase its economic activities and to attract additional investment in the area.

E3.1.10 Landscape and Visual Setting

Gualeguaychú is located inland from the Río Uruguay on the banks of the Río Gualeguaychú, a tributary to the Río Uruguay. Similar to the landscape of Río Negro, there are soft undulations with agriculture, forests and wetlands dominating the landscape outside the urban area. North of the City of Gualeguaychú is the beach resort Ñandubaysal. The resort offers a relatively “natural” appearance and boasts approximately 1000m of white beaches along the Río Uruguay. The beach is defined by the entry of Río Gualeguaychú to the south and a wetland area to the north.

E4.0 PROFILE OF NATURAL RESOURCES DEPENDENT LIVELIHOODS

Key livelihoods that rely on natural resources were identified during stakeholder consultation as livelihoods that could potentially be impacted as a result of individual or cumulative emissions from the mills to the air or water. Livelihoods include farming, fishing, forestry, beekeeping and tourism. Transboundary cumulative impacts on the livelihoods within the project area of influence are discussed in Section E5.

E4.1 Agricultural Activity

The area of influence is predominately engaged in some form of agricultural activity. Activities include growing and selling cash crops (including citrus), meat and milk production, and grazing of livestock. Approximately ¾ of the land use in Uruguay's area of influence is dedicated to agricultural activities. Natural and plantation forests make up only 3.6 and 7.5% of the agricultural sector land use, respectively (Botnia, June 2004). Similarly, the land use in Gualeguaychú reflects a similar proportion of lands dedicated to agricultural activities. Raising cattle tends to be the main activity in the departments closest to the mill sites; however, wheat, oats, sunflower and soya bean are the main crops harvested. The Department of Paysandú; however, has a greater number of farms related to vegetable, fruit and grape production; horticulture, and sheep. A larger percentage of these farms generate products for self-consumption compared to other operations in the Uruguay/Argentina area of influence.

In general, small family farms are located around Fray Bentos in Río Negro and the larger, more technical operations are found around Young. Río Negro is the 5th largest milk producing department in Uruguay (Botnia, June 2004).

Farm production operations are predominant in the Uruguay Departments within the area of influence. According to the PCI America and Malcolm Pirnie draft Social Impact Assessment, the main source of income (accounting for over 50%) for those engaged in agricultural activities is from meat and milk production activities. Over three-quarters of the land within these Departments is devoted to farming. Annex I (Section 1.1.8) illustrates the distribution of lands allocated to the various types of agricultural activities within the three Departments.

For Río Negro, the gross value of agriculture for 2002 reached USD 53.4 million, equal to 4.8% of the sector total in Uruguay, thus emphasizing the importance of the agricultural sector in Río Negro. In Soriano, agriculture contributed USD 51.1 million, or 4.5% of the sector total, and in Paysandú, USD 87.3 million, or 7.8% of the national total (Botnia, 2004).

Within the Gualeguaychú area of influence, there is a high percentage of small farms with 47.3% of the farm holdings less than 100 hectares. In Gualeguaychú, 19.4% of farmland is designated for crops, 51.6% is assigned to pasture, and 12.3% to forests and/or spontaneous woodland.

Similar to Departments in the Uruguay area of influence, the main agricultural activity in Entre Ríos is cattle raising, where 61.5% of the land of the Province is assigned to natural prairies and forages. Cattle grazing is concentrated in the north and south areas of the Province. The Province is one of the main producers and exporters in Argentina, and the processing capacity as well as export demand is recovering after a cyclical downturn (Botnia, 2004).

Grain such as wheat, rice, soya and sorghum, are cultivated in the centre and south part the Province. According to the Botnia Social Impact Assessment, Entre Ríos is also the primary producer and exporter of citrus fruits and their products in Argentina.

E4.2 Fishery Resources

The commercial and artisan fishing activity is mainly in the Río Uruguay including 16 artisan fishermen in Paysandú, 90 in Río Negro, 20 in Soriano, and 50 in Entre Ríos. The destination of the artisan fish catch is mainly to the domestic market in Uruguay and Argentina.

There are two cold storage facilities for fish in Fray Bentos, that purchase dorado, boga, and sábalo for export to Brazil. In Gualeguaychú, one industrial fishery operates sporadically manufacturing fish flour. According to Sejenovich *et al*., an effort is being made by local fishermen to combine and coordinate marketing efforts and to develop new products, such as fish burgers available at restaurants.

At present, the most abundant fish varieties are boga and sábalo. Other species like dorado, patí and surubí are caught in lesser quantities. The harvest period for sábalo is from December to February and for boga, April to May, when a fisherman can obtain an average of 300 kilograms of fish per day. Only half the registered fishermen are dedicated to the activity permanently, the remainder are only active during the harvest period to supplement their income.

The fishermen interviewed for the social impact study have stated that, in the last few years, there has been a decrease in the amount of fish in the rivers due to the rise of fishing, using fine mesh nets (PCI Americas and Malcolm Pirnie, November 2005). According to the Stakeholder consultation conducted by The Consensus Building Institute, Fishermen in Las Cañas indicated that species of fish have disappeared in recent years, a trend they attribute to the use of chemicals by the agricultural and forestry industries (The Consensus Building Institute, December 2005). Those interviewed expressed further concern that the addition of the effluent from the pulp mills would further deteriorate the regional fishery and destroy their fishing livelihood. It was also suggested during interviews carried out in July 2006 in Fray Bentos, and confirmed by DINAMA, that the regional fishery has experienced changes due to the development of the Salto Hydroelectric dam on the Río Uruguay.

E4.3 Forestry Production

The development of the forestry sector in Uruguay experienced significant growth after the implementation of the Forestry Act in 1988, offering tax exemptions and other benefits to plantations and industrial initiatives in the forestry sector. The incentive program is still in place; however, financial subsidies are being phased out and will end by 2007.

There are a total of 17.3 million hectares of land in Uruguay, of which the Dirección Forestal has categorized 3.57 million hectares as "Forest Priority Soils". Only lands that have been categorized as "Forest Priority Soils" qualify for the tree plantation subsidy and tax benefits. All planting plans must be approved by the Dirección Forestal (Annex B - Plantations). The area committed to plantations in the project area of influence is 6.8% in Paysandú, 7.4% in Río Negro, 2.5% in Soriano, and 7.6% in Entre Ríos (PCI Americas, November 2005).

The rate of growth of forest production in Uruguay slowed down in the last five-year period, reaching a peak during the years 1996 to 1998.

The number of jobs generated in the Uruguay Departments annually by forestry has increased from approximately 4,000 during the 1989-1990 period to approximately 10,000 in 2003. For the year 2010, the generation of approximately 19,000 jobs in the sector is projected (Society of Forest Producers).

The phase that produces the largest number of jobs is during the growth and harvesting of the wood product this includes nursery operations, planting the seedlings and harvesting. For the year 1995, this phase contributed almost 7 out of 10 jobs in the industry. The transportation and logistics of the wood supply continue to contribute additional jobs and will increase significantly once both mills are operational.

In Entre Ríos province, 1,053,931 hectares are designated to forestry (2002 figure). According to the National Farming Census, plantations in Entre Ríos total approximately 11,977 hectares, and in Gualeguaychú, 2,209 hectares. Plantations are more predominate in the northern region of Entre Ríos. Of the hectares designated for forestry, 1,627 hectares are planted in Gualeguaychú, and 65,606 hectares total are planted in Entre Ríos (Annex B – Plantations)

As discussed in Annex B of the Cumulative Impact Assessment, there is a surplus of eucalyptus pulpwood in Argentina, and, although it is unlikely, if the pulp mills utilize some of that supply, there will not be any pressure to further convert grassland or agricultural land for plantations.

E4.4 Beekeeping

The number of beekeepers in the three Uruguayan Departments in 2005 increased to 2,604 (JUNAGRA, 2006). Compared to 2001 figures, the number of beekeepers more than doubled in Paysandú. Growth was also experienced in Río Negro, whereas in Soriano, the number of beekeepers has remained constant. One-third (33.4%) of the honey producers in Uruguay are in these three Departments.

Despite increased growth in the number of beekeepers in Río Negro and Paysandú, Soriano has the largest number of beehives of the three Uruguay Departments as presented in Table E4.1. Entre Ríos has the lowest number of beehives in the area of influence.

Table E4.1: Number of Beekeepers and Number of Beehives by Department

Department	No. Beekeepers	No. Beehives
Río Negro	562	38,470
Paysandú	883	64,329
Soriano	459	100,855
Entre Ríos	700	14,000

Source: JUNAGRA and PCI Americas and Malcolm Pirnie, 2005

In Paysandú, between 20 and 40% of the exported honey is derived from the flower of the eucalyptus tree. The main destination of the honey is the domestic market and the European market. Honey produced in Entre Ríos is primarily exported to Europe and the United States. Gualeguaychú produces 2% of Argentina's total honey production and generates $ US 4,000,000 annually. The main varieties exported are prairie honey and eucalyptus honey.

As documented in the draft CIS study, beekeepers stated that during recent years there has been a high mortality of bees. In 2001, 9,000 beehives died in the Gualeguaychú area.

During an interview conducted in July 2006, with CALAPIS, the beekeepers co-operative in Paysandú, it was stated that the eucalyptus plantations have resulted in an annual stabilization of honey production and in a longer collection period. The eucalyptus trees flower in July, thus extending the collection season by four months.

E4.5 Tourism

In response to stakeholder comments, an additional study was commissioned by the IFC to better understand the significance of tourism in Uruguay and Argentina in the area of the proposed pulp mills. The study included preparing a profile and economic baseline of the tourism sector in Uruguay with particular focus on Fray Bentos and Las Cañas within the Department of Río Negro; and in Argentina, the area of Gualeguaychú and Ñandubaysal within the province of Entre Ríos. The tourism report is presented in Annex II.

E4.5.1 Tourism Profile

Tourism in the area of influence focuses on several different experiences including: "sun and beach", water sports, rural tourism, ecotourism, urban and cultural tourism, and in Gualeguaychú specifically, thermal spas and Carnival. Tourism in the area of influence suffers from extreme cyclical economic fluctuations over time. During the International Bridge blockade over the summer months of 2006, tourism dropped 60% in Fray Bentos, similarly, in 2002 during the River Plate Crisis, the number of visitors drastically dropped on both sides of the river.

Visitors to Uruguay are predominantly from Argentina, although in recent years, Uruguay has been successful in attracting an increasing number of tourists from Brazil, Chile, Paraguay, Europe, North America and Asia. In the peak year 1997, 1.6 million Argentines visited Uruguay, this dropped to approximately 11,000 in the crisis year 2002 and by 2005 it had recovered somewhat to 1.1 million, still well below the record year.

Tourism in Uruguay is moderately important in terms of Gross Domestic Product (GDP), with expenditure of tourists being equivalent to between 2.5% and 3.7% of GDP in recent years. In terms of exports and foreign exchange, tourism is of much greater significance, having reached 31% of goods exported in 1999 and 17% in 2004, reflecting the relatively depressed tourism market and the recovery of exports, which by 2004 were at record levels in terms of US dollars.

Regarding the expenditures related to tourism, they declined from US$ 827 million in 1997 (US$ 336 per visitor) to US$ 540 in 2005 (US$ 284 per visitor). This has affected the hotel and restaurant sector the most. It showed a much more marked decline during the recent crisis than the economy in general, with a drop of activity in 2002 and 2003 reaching 75% and 72% respectively of the 1997 peak. The recovery of 2004 was only 82% of the 1997 peak level.

According to an economic study of the region's tourism by Peter Smith (Smith, 2006), attached to this study as Annex II, a high percentage of annual tourists visit Uruguay during the months of January and February, with January typically being the peak month. In "normal" years almost half of the Argentine visitors arrive during the 1st quarter.

Smith reports in the Tourism Study that in 2005, with the exception of Europeans, all visitors registered considerably longer average lengths of stay during the first quarter. The average length of stay during this time is 9.1 days compared to 6.9 days for the entire year. Over the five year period leading up to 2005, there is a discernable increase in the length of stay of Argentines and a decrease in the length of stay of other nationalities as a group.

The length of stay and spending patterns of Argentine tourists are the predominant factors contributing to the tourism sector within the Uruguayan economy. In the first quarter of the years 2000 to 2005, Argentines spent an average of US$ 160 million, varying from US$ 78 million in the low year and US$ 258 million in the high year.

E4.5.1.1 Tourism in the Littoral Region

The Littoral Region comprises the Uruguay Departments of Río Negro, Soriano, Paysandú and Salto. The numbers that the Ministry of Tourism and Sport record on the volume of tourists to the "thermal coastal" or thermal spa zone estimates 217,749 tourists visited this region of the country annually, accounting for nearly 12% of the tourists who visited the country. During the first quarter the thermal coastal zone received 37.4% of the tourists. The main destination during the summer season of 2004 (January-March) was Fray Bentos – Las Cañas, receiving 36.3% of the total tourists, more than any other tourist destination. During the rest of the year, the main attraction for the visitors to the area is in the thermal zones of Salto and Paysandú.

During the past ten years, the Littoral Region has received between 11% and 19% of the annual visitors, with the average being 14.6% of visitors of known destinations within the country.

The length of stay for visitors to the Littoral Region is considerably less than for other regions. The country average length of stay is 9 days, and the average length of stay in the Littoral Region is 4.9 days. Uruguayans and Brazilians remain in the region for periods of 6.2 and 5 days respectively, while Argentines stay for a period of 4.6 days.

The expenditures in the first quarter to the Littoral Region is US$ 7 million, and makes up only about 3.7% of the total, the second lowest of any major tourist region in the country.

The percentage of annual expenditures in the first quarter is between 28% in 2003 and 42% in 2000. The Littoral Region accounted for 7.5% of the total of visitors spendings in 2001 and has fallen to 4.2% in 2005.

The visitor's daily expenditure for the first quarter is the lowest of all the destinations in Uruguay, with an average expenditure in the period 2000 to 2005 of US$ 20.26. On both a yearly basis and for the first quarters, average spending per visit and per day fell with the crisis and is still below the 2001 level and in the last three years spending per capita has been highest in the rest of the year rather than in the first quarter, during which visits tend to be predominantly at the thermal spas.

Over the period 2000 to 2005, in the Littoral Region, on the average, Argentine visitors accounted for nearly 76% of total international visitors. In 2005, 74% of visitors were Argentines. The next largest market are expatriate Uruguayans, accounting for 14% of the visitors in 2005, followed by Brazilians who represent 10% of the market .

In the Littoral Region, in the period 2000 to 2005, on average about 27% of visitors stayed with friends and family, 24% in hotels and about 4% in their own house. In normal years, the first quarter accounted for about 44% of visitors. With the crisis, this dropped to 29% by 2003 and recovered to about 37% in 2005.

The first quarter is the most important for rented housing with 51% of those renting houses visiting during this period in 2000. This figure that subsequently dropped to 30% in 2003, before recovering to 42% by 2005.

The Littoral Region is the principal destination for a high percentage of campers visiting Uruguay, accounting for 69.4% of campers in 2001 and 52.7% in 2005. The number of campers both in Uruguay and for the Littoral Region has fallen since 2001 from 66,700 to 31,300 and from 46,300 to 16,500 respectively. Campers stay in the region for an average of 5 days during the first quarter.

E4.5.1.2 Tourism in Río Negro

There are a number of tourist facilities in Río Negro, including 4 hotels in Fray Bentos with a capacity of 264 beds and bungalows, one of which is 3 star standard, two are 2 star standard and the other is one star standard. There are also private houses and motels in Las Cañas with an estimated capacity of 1,000 beds. In addition, hotels and motels in San Javier, Nuevo Berlin and Young provide an additional 150 beds. There are various camping grounds in the Department, complete with facilities, the largest of which is Las Cañas, where there is space for 2,500 tents, or up to 10,000 persons. There are also about 350 private houses, mostly owned by Argentines, many of which are rented out to visitors, particularly during January and February.

The first quarter of each year accounts for an average of 44% of the visitors to Fray Bentos/Las Cañas. The number of visitors increased from 61,756 in 2002 to 68,009 in 2004 and fell to 61,919 in 2005. The average of visitors during the first quarter has been increasing from 39.7% in 2002 to 47.7% in 2004 and fell to 43.8% in 2005.

A survey was carried out by the Government of Río Negro during 2001, in which 400 adults, selected by random sampling methods were interviewed at four separate times during

January and February. The results of the survey complement the information provided by the Ministry of Tourism and Sport. The most important results are the following:

- Campers are the most important segment of the lodging market, representing an average of about 43% of respondents
- Rented houses are the next most important form of lodging, with occupancy higher in February than in January. Visitors living in their own houses are a relatively small group, but significantly higher in January than February. There are about 350 houses in Las Cañas, and it appears that some owners occupy their own houses in January and rent them during February.
- Visitors staying with friends and family are a small percentage of the total.
- Hotels and motels accounted for only about 10% of total lodging.
- About three quarters of visitors are from Argentina and almost one quarter from Uruguay. A very small percentage of visitors come from other countries.
- The percentage of visitors from Argentina is highest at the beginning of the year and tapers off in February.
- The percentage of Uruguayans is highest in February reaching over 35% of the total in the survey at the end of that month.
- Visitors from the Littoral Region account for about 15% and visitors from Río Negro are a greater proportion at the beginning of the quarter.
- Nearly 15% of total visitors are from Entre Ríos and 56% from Buenos Aires.

In terms of revenue, in 2000 the income from Las Cañas was US$ 302,000, and fell to US$ 83,000 in 2002, or one-third of their 2000 level. In 2006 the income was US$ 50,000. Camping was the most affected, with revenues being only 6% of the 2000 level. In 2000, camping accounted for 64% of the revenues, in the latest season 2006, the share for camping was only 35%.

In the Tourism Study, Smith estimated the annual expenditures by international visitors at US$ 23 million in 2000, US$9.5 million in 2002 and US$11.9 million in 2005, an average expenditure per visitor-day of US$ 37. The first quarter accounted for about 52% of the total annual expenditure.

The average visitor had daily expenditure of about US$ 11 on food, US$ 10 on transportation, US$ 7 on lodging and US$ 6 on purchases.

There is no information available on the magnitude of internal tourism and it is difficult to estimate the amount of domestic tourist expenditure in Fray Bentos/Las Cañas. The 2001 survey suggests that there was roughly a 75:25 ratio between the number of Argentines and Uruguayan visitors, but even that ratio varied widely according to the date on which the survey was taken.

The commerce, hotel and restaurant sector, while witnessing high levels of activity prior to 1998 and substantial decline through 2001, showed a large drop in activity in the crisis year of 2002 when the value added was only 71% of the peak level and in 2002 only 72% of the peak.

As a result, and similar to trends in the country as a whole, the commerce, hotel and restaurant sector in Río Negro is progressively contributing less to GDP. In 1993, their combined contribution was 15.7% of the GDP and by 2003, only 9% of GDP. Although data was not available later than 2003, local opinion points to a substantial recovery in this sector in 2004 and 2005, with new operators coming into the Department, encouraged by the increase in construction activity associated with the pulp mills.

Smith estimates the direct contribution of tourism to the economy of Río Negro, both in terms of the commerce, hotel and restaurant sector and of the total GDP, for the years 2000-2003, for which information is available on departmental GDP. The international expenditure was 75% of the total and the percentage of value added to gross product is 0.725 for commerce, hotels and restaurants and 0.62 for the total GDP, in conformance with experience at the national level in these years. the contribution of Tourism to the economy is presented in Table E4.2.

Table E4.2: Contribution of Tourism in Fray Bentos/Las Cañas to Gross Departmental Domestic Product 2000 – 2003 in US$ Millions

	2000	2001	2002	2003
Expenditure- International Visitors	22.9	20.9	9.5	8.6
Expenditure- Uruguayan visitors	7.6	7.0	3.2	2.9
Total Visitor Expenditure	30.5	27.9	12.7	11.5
GDDP Commerce, Hotels & Restaurants	33.7	30.3	18.5	16.6
Gross Departmental Product	256.2	256.7	185.7	184.0
Tourism Value Added CHR Sector	16.9	15.2	7.0	5.7
Tourism value added GDDP	**18.9**	**17.3**	**7.9**	**7.1**
Visitor value added as % of CHR Value Added	**36.4**	**36.3**	**27.5**	**25.0**
Visitor value added as % of GDDP	**3.0**	**2.7**	**1.7**	**1.6**

Source: Smith, Peter. Tourism Assessment of Gualeguaychú in the Province of Entre Ríos, Argentina and Fray Bentos in the Department of Río Negro, Uruguay. April, 2006

The number of jobs directly associated with tourism is difficult to estimate, as insufficient information is available on the number of people employed directly as a result of tourism activities. The Director of Tourism suggests that in the commerce, hotel, restaurant and transport sectors, about 150 full time jobs would be attributable to tourism and that during January and February an additional 600 jobs, most of which are related to activities in Las Cañas, are created to serve the heavy influx of visitors during the summer months.

During a site visit in July 2006 to Las Cañas, road infrastructure appeared to be in good standing and with the exception of one restaurant, all services and shops were closed. A series of photographs provide an overview of Las Cañas, see Figures 4.5-1 to 4.5-4. Hotel quality is low with a 2 star designation the maximum according to the Tourism officers. For example, the privately owned Hotel Sol de Las Cañas, built around 6 years ago, provided wi-fi Internet access, only breakfast service, and no phone services in the rooms. They do not accept credit cards, avoid accepting US dollars, and prefer Uruguayan currency only.

Figure E4.5-1: Camping Las Cañas

Figure E4.5-2: Las Cañas Beach

Figure E4.5-3: Vacation Accommodation, Las Cañas

Figure E4.5-4: Las Cañas Restaurant

According to the Director of Tourism for Río Negro, due to the International Bridge blockade, and the reduction of Argentine tourists, they are launching several programs to attract tourism to the area:

- **Cultural Tourism**
  A Popular songs Festival in Nuevo Berlín, a town with 2,500 inhabitants 40 km from Fray Bentos. Carnival, which consist of related events throughout the Department during February. Due to lack of resources, Carnival activities were only performed in Fray Bentos; however, with support from both pulp mill Companies, coverage to the entire region for Carnival celebrations has increased, including a Finish Tango group at the last Carnival.

  Also there is the intention to declare the Anglo Zone (where the Industrial Revolution Museum is located) as an Historical Site.

- **Ecotourism**
  The islands of Uruguay River have 15,500 hectares of natural forest areas. Esteros del Faropo, the first designated Government protected natural forest area, is an important tourist attraction for birds observation.

The target market for this program is Brazil, Paraguay and Chile. Montevideo tourism operators have adapted 6 large houses, each with 10 beds to serve as accommodation for these ecotourists. To make this program feasible, The Department of Tourism formed a partnership with the NGO Aves del Uruguay that supplies tour guide services.

- **Rural Tourism**
  An agro tourism program is promoted in Young, focusing on the sale of artisan products and farm operation tours. Accommodations for rural tourism include 4 large houses, each with 4 rooms that have been adopted/renovated and offer a 4 star standard to visitors.

E4.5.1.3 Tourism in Gualeguaychú and Ñandubaysal Resort

International visitors to Argentina predominately originate from neighbouring countries such as Chile, Paraguay and to a lesser extent Uruguay, and Europe. Information on internal tourism is not so well documented, although from the INDEC-SECTUR Survey on Hotel Occupancy it can be established that in 2005 there were at least 37 million overnight stays in hotels and parahotels[1], of which about 28 million nights were accounted for by residents of Argentina, and about 9 million nights by non-residents.[2] The average stay in hotels and parahotels is 2.5 nights, both for residents and non-residents (Smith, 2006).

The Province of Entre Ríos accounts for about 3.2% of Argentina's population and about 2.1% of the Gross Domestic Product.

The hotel and restaurant sector, while witnessing high levels of activity prior to 1998 and substantial decline through 2001, showed a very large drop in activity in the crisis year of 2002 when the value added by hotels was only 71% of the peak 1998 level and that for restaurants was 74% of the peak, but the sector recovered somewhat in the following year.

As a result, and contrary to trends in the country as a whole, the hotel and restaurant sector in Entre Ríos is progressively contributing less to GDP. In 1993, hotels and restaurant combined contributed with 1.9% of the GDP and by 2003 it was only 1.4% of GDP.

The City of Gualeguaychú is a very active tourist destination and the City has identified tourism as an important part of their Strategic Development Plan.

The Secretariat of Tourism of the Municipality estimates 447,000 tourists visited the zone in the summer season of 2005 (January, February, and the first March fortnight).

[1] Parahotels are those establishments not classified as hotels, but offering similar services. These would include apartment hotels, bungalows, bed and breakfast establishments, residences etc.
[2] Annualized on the basis of ten months data.

Gualeguaychú has a more extensive infrastructure of tourist establishments than Fray Bentos, in part due its location 250 km from the metropolitan area of Buenos Aires. Contrary to Fray Bentos, the percentage of international visitors is fairly small.

There are a diverse number of tourist facilities in Gualeguaychú, including hotels, apartment hotels, bungalows, bed and breakfast facilities, dormitories and campsites. In 2006, approximately 11 hotels and 54 parahotels were identified as well as 22 campgrounds.

On average there were 291 available hotel rooms and 508 rooms in other lodging during 2005. It is estimated that there are another 1,500 rooms available during the peak season. In addition campsites offered almost 5,000 places to pitch tents, including spaces in which to park mobile homes. In 2005, hotels and other establishments provided 2,691 beds, on average, of which hotels accounted for about 758 beds and parahotels for 1,933 beds. The other facilities in private houses or with friends and family could provide another estimated 4,500 beds, although these numbers are not known. The sleeping capacity of campsites exceeds 20,000 places, or an average of 4 people per camping space (Smith, 2006).

Tourist lodging establishments employ about approximately 11 people on a full time basis, with hotels accounting for about 100 of these. The campsites directly employ an additional 30 people full time. Another one hundred additional people are hired on a part time basis for the hotel and other lodgings during the peak season in January and February. Campsites would also increase their personnel for the peak two months, by as much as 100 people. In this period, in lodging, restaurant, entertainment, security and other tourism services, employment might be expected to be 3 or 4 times the direct employment in hotels and other lodgings.

Tourism in Gualeguaychú is seasonal, concentrated on weekends, undertaken by persons with modest spending power, affected by overall economic conditions in the country, and by the local weather. The discovery of thermal springs in the area has led to the development of thermal spas, which it is believed will attract tourists with higher spending power and reduce the seasonality of tourism.

The main tourist attraction in Gualeguaychú is the Carnival. In 2005, 164,376 tickets were sold for Carnival celebrations, an activity that contributes to the economic resources of 1,500 families, according to the Secretariat of Tourism for the Municipality. Carnival also brings visitors interested in the offerings of "sun and beach." There are 12 bathing and camping areas in the zone, with the majority on the Gualeguaychú River. The largest beach is Ñandubaysal located north of the city of Gualeguaychú on the Uruguay River. During its peak season approximately 350 people work at the resort and it is visited by 160,000 tourists annually.

According to information provided by Mr. Oscar Rolón at Ñandubaysal Resort, and through direct observation made in July 2006, Ñandubaysal is around 40 years old; and has the following features: vehicle parking, sanitary infrastructure, electric power and warm water, grocery supplies, restaurant, disco facility, entertainment facilities, and shops. All of these features are available only during the peak season. Hourly bus transportation is available to the city of Gualeguaychú, and police services and vehicle maintenance are also provided on-site at Ñandubaysal. A number of sport facilities are available including horseback riding, boating, and board sailing. The types of accommodation available include tent camping sites, trailer sites, and 12 cottages (four person capacity) with private washroom facilities. Common washroom and shower facilities are provided throughout the campground. A selection of photographs depicting the facilities and services are attached, see Figures 4.5-5 to 4.5-10.

Figure E4.5-5: Windsurfing Outfitters Argentina

Figure E4.5-6: Campsite - Ñandubaysal

Figure E4.5-7: Recreation Centre - Ñandubaysal

Figure E4.5-8: Ñandubaysal Beach Resort

Figure E4.5-9: Bus Stop – Ñandubaysal Beach Resort

Figure E4.5-10: Looking Towards Uruguay

High season is from December 8 up to the weekend of Easter. In January and February, weekend occupancy is around 1,800 out of the 2,000 sites available, with a 90% level of occupancy.

From Monday to Thursday, the occupancy level drops to 700 – 800 sites, as well as weekends for the rest of the season. That means, in high season the average occupancy level reaches around 60%.

In the December 2005 – March 2006 season, registered prices where:

- camping Sites Ar$ 22/day
- VIP Sites Ar$ 33/day
- Entrance fee Ar$ 2.5 per person
- Vehicles toll (municipal) Ar$ 1 per car in high season
- A reimbursable amount of Ar$ 50 must be deposit in the entrance.

- In high season there is available public transportation each hour to Gualeguaychú at a rate of Ar$ 2.5 per person.

The Carnival at Gualeguaychú is unique in that it is not restricted to Carnival Week, as in other locations, taking place on every weekend during January and February. It attracts large numbers of visitors; the record night attendance was nearly 33,000 in 2005.

Smith estimated that Carnival accounts for 73% of total annual tourist revenues.

About 75% of the 2005 visitors to the Carnival were from the City and Province of Buenos Aires; although preliminary data from 2006 show that this has dropped to 70%. Of particular importance has been the increase in attendance by residents of Santa Fe and Cordoba Provinces, boosted by the opening of the Victoria-Rosario Bridge over the Parana River, which shortened the journey time and distance between those provinces and Gualeguaychú. The visitors from these provinces have increased from 4.3% and 0.9% in year 2000 to 9.6% and 3% in 2005.

In recent years the Carnival has approached the record levels of the late 1990s. The all time maximum attendance for a Carnival night exceeded 33,000 and the theoretical capacity of the Corsódromo, where the Carnival parade is held, is said to be 32,000. About 10% of the audience are residents. Hotel bed capacity is inadequate and people are accommodated in rented rooms in private houses and with friends and family. In recent years it appears that about two thirds of the visitors stay in paid lodgings, less that 10% with relatives and the balance either remain in their vehicles overnight or return home. In the crisis of 2002, those remaining in their vehicles reached a high of 9%. On the average, nearly 40% of the lodgers are stay at campsites.

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The average Carnival Visitor in 2005 spent about US$ 18.6 per day. Daily spending is highest for visitors using hotels and lowest for campers. The duration of stay has increased steadily from 2.95 in 2000 to 3.35 in 2005.

Table E4.3 summarizes the expenditure per visit and per day. The devastating effect of the River Plate Crisis of 2002 on Carnival revenues can be seen, when revenues in real terms in 2002 were only one third of the revenue of the previous year.

Table E4.3: Expenditures by Carnival Visitors - 2000–2005

	2000	2001	2002	2003	2004	2005
Expenditure per visitor (US$)	118.33	Approx. 11.15	47.46	36.64	57.74	59.73
Daily expenditure per visitor (US$)	43.65	56.81	17.81	15.72	19.59	18.49
Total Expenditure (US$ millions)	16.625	Approx. 11.160	4.344	4.608	7.775	9.206

Source: Smith, Peter. Tourism Assessment of Gualeguaychú in the Province of Entre Ríos, Argentina and Fray Bentos in the Department of Río Negro, Uruguay. April, 2006

Smith found that on the average, 26% of the campsite nights were accounted for in the period from March to December, and that two thirds of the visitors camp during January and February. The yearly expenditure in 2005 was US$ 18 million, 73.5% of which was generated during January and February.

Nevertheless, Gualeguaychú is able to attract an average of about 367 visitors per day in the off season, with heavy concentration of visitors on long weekends.

Gualeguaychú has a considerable number of visitors, who stay a relatively short amount of time and spend a relatively small amount of money per day. The total expenditure by visitor however, is important, contributing an estimated 8% to the city's gross product and providing about 250 full time jobs and about an additional 1,000 part time jobs during high season.

In recent years, a diversification of tourist attractions have been proposed and studied in an attempt to increase the number of visitors all year round. Those studied include: thermal investments, an automobile race track, a center for fairs and conventions, a thematic casino at the Carnival, marina clubs, and protected natural areas.

E5.0 CUMULATIVE SOCIAL IMPACTS

Generally, cumulative social impacts are those that result from construction and operation of both the Orion and CMB mill sites and ports, and the activities associated with supplying the mills with eucalyptus wood. Positive social impacts will predominately be experienced in Uruguay, in the Departments of Río Negro, Paysandú and Soriano, and specifically in the cities of Fray Bentos, Mercedes, Paysandú and to some extent Young. These social impacts are identified and discussed below. Gualeguaychú is not likely to experience any positive social impacts as a result of this project due to the high level of concern and strong opposition demonstrated to date.

E5.1 Social Indicators

E5.1.1 Demographic Characteristics

The direct social impact of the construction stage will be the job opportunities generated and the consequent increase in affluence, mainly in the city of Fray Bentos and its surroundings. An increase in the population is expected in Fray Bentos, mainly men and young people, given the profile of the required construction jobs at the two plants. Analysis of the economic impacts of the mill projects indicates that there will be approximately 18,000 *jobs created in the construction of both mills: 8,800 direct, 6,900 indirect*[3]*, and 3,300 approximately induced*[4]*.* It is estimated that given the characteristics of the area of influence, the demand for workers will only be partially met by people from the region. Due to the inherent difficulties of manual labour travelling across the border due to the conflict, no quantitative significant migration flows are expected from Gualeguaychú towards Fray Bentos.

The schedule for construction at the ENCE CMB mill site is such that many of the workers and subcontractors will be able to commence similar work at the ENCE mill, once their work is completed at the Botnia site. It is anticipated that the overlap in construction scheduling will result in a requirement of approximately 4000 workers for the combined construction efforts of Botnia and ENCE.

It is anticipated that once the construction phase is completed, workers that have migrated to Fray Bentos (this does not include those that are bussed daily to the mill sites for work) will return to their communities of origin, or as is typical of manual construction jobs, workers will look for employment at other construction sites.

[3] Indirect impacts are defined by Pirnie in Annex III as activities of all other sectors directly related to building the pulp mills and carrying out all related work and providing services to the mills and its employees.
[4] Induced impacts are defined by Pirnie in Annex III as activities resulting from increases in consumption and investment as a result of the construction of the pulp mills.

During recent interviews, the displacement of workers at the end of the construction period did not seem to be of concern to Officials in Fray Bentos, as it is widely accepted that construction workers tend to move to other sites or locations for employment as was the case with the construction of the International Bridge and the Salto Grande Hydro-electric dam. This trend appears to predominantly affect young men and manual labourers. The treatment of housing during the construction period and after can influence the movement of workers. This is discussed below.

E5.1.2 Education

The cumulative impact on the education system will be experienced in the Uruguay area of influence, and not within the Gualeguaychú area of influence. The degree of educational support required will depend on the characteristics of the incoming population; number of families with school-age children, and where they live. The highest concentration of employment is during the construction phase of the projects; however, some families will relocate to Fray Bentos for the operation phase. It is not anticipated that any of the families will relocate to Gualeguaychú, thus the education system in that city will not experience an influx of students.

The distribution of schools and student enrolment varies by location in Río Negro. Rural schools in Río Negro tend to be less populated than those schools located in the urban area of Fray Bentos. An Education Ministry initiative to address school accommodation needs and redistribution of students resulted in the building of a new public secondary school in Fray Bentos (Grammar School No. 3). Student boundaries were also redefined causing conflict with families that did not want to change schools. This government education initiative precedes development of the Botnia and ENCE mill sites. From the July 2006 Botnia monitoring report, it appears that other than changes already anticipated by the Education Ministry, there has not been a significant increase in the demand for educational services.

It is anticipated that private schools will be developed in Fray Bentos. In recent discussions with Botnia, it was anticipated that approximately 10% of their operational work force will be experts from Finland or other countries that will move their families to Fray Bentos. It is anticipated that private schooling that mirrors the curriculum of Finnish schools will be required and financially supported by Botnia.

A number of beneficial impacts have already been experienced by Fray Bentos and other communities in the area of influence due to the earlier of construction of the port at M'Bopicuá and the ENCE mill site preparation, and to the construction of the Botnia mill and associated works. For example, the training of workers in specialized areas, such as welding and sanitary engineering. A new welding school located in close proximity to the Botnia plant site, is currently training welders for construction work, as seen in Figure E5.1-1. During an interview with Río Negro Officials, it was offered that Botnia has contributed to the training of 500 welders at the high schools in Fray Bentos, Young, Soriano and Paysandú.

Figure E5.1-1: Welding School in Close Proximity to Botnia's Orion Mill

The increased demand for specialized workers will also result in the need to train additional teachers in these fields. Teachers presently working in these fields serving the community may potentially be attracted away from their current employment to attend to the needs of the mills, thus requiring they be replaced, either by training or encouraging replacements from outside the area of influence.

The Region will also benefit from the proactive education initiatives that are part of Botnia's community action plan. During consultations with various government and agency representatives, a number of educational programs were identified and partnerships developed to implement new training initiatives including computer science, hospitality and business development training. The computer science training program developed will engage 100 students. This program will be offered this October/November after regular school hours to students aged 11 and 12 years old.

ENCE also seeks to promote for beneficial and responsible social development within its zone of influence as identified in their Environmental and Social Action Plan (2006). Activities already implemented in Uruguay include outdoor environmental education at its reserves, lunch programs in schools, financial support of sports equipment and tournaments/matches, and support for the development of cultural events (theatre, concerts, and choirs). In addition, it co-sponsors the publication of text books and vocational training materials with the Ministry of Education.

A negative impact of the construction phase is that the secondary school drop-out rate may increase as the jobs offered by the mills may be more attractive to some than continuing their formal education. Regular monitoring will provide an indication if this trend is developing.

During the operation phase the demand for private education in the area of influence is not anticipated to decrease with the reduction in employment at the mills, as the number of highly skilled, highly educated employees will make up 10% of the work force. The demand will cover pre-school, primary and secondary education.

It is possible that there could be a return to the educational system by students that dropped out to take low skill level jobs during the construction phase, as there would be a reduction in the availability of those job opportunities and a realization of the value of obtaining higher skills in order to secure jobs during the operational phase, either at the mills or in related industries.

ENCE's efforts to provide recycling programs and other environmental education programming in schools and through use of their Nature reserve (Figure E5.1-2) will continue during the operation phase benefiting both children and society as a whole.

Figure E5.1-2 ENCE Nature Reserve Adjacent to CMB Mill Site

E5.1.3 Employment

The employment projections are discussed in the Economic Impact Assessment in Annex III of this report. The cumulative impact in the area of influence on employment is anticipated to be experienced only in Uruguay. Despite the availability of workers, qualified service contractors and wood supply in Argentina, given the negative climate toward the mills in Gualeguaychú, it is not anticipated that workers for the construction phase will originate from there. Existing public and peer pressure may even preclude individuals from seeking employment at the mills. This factor reduces prospects of Gualeguaychú realizing socio-economic benefits from the projects.

In the Uruguay area of influence, the cumulative impact anticipated is the creation of an economic “boom” scenario. Fray Bentos has experienced a “bust” scenario since the closure of the Anglo meat processing plant in 1979; consequently, the community has experienced higher unemployment and a dependency on public employment. Thus, the mills will result in a positive social impact due to the reduction in the unemployment rate within the area of influence, and an increase in the number of people economically active.

Table 11 in Annex III provides an overview of the cumulative employment anticipated during the construction phase of the pulp mills (Figures E5.1-3 and E5.1-4). Direct employment is projected at approximately 7,700 full time jobs, 6,900 indirect jobs, and 3,100 induced jobs.

Figure E5.1-3: Botnia Mill Site Under Construction, Looking Toward the River

Figure E5.1-4: ENCE Mill Site, Preparation for Construction

Based on review of the Botnia monitoring report for July 2006 and discussions with their social experts, Botnia or its contractors have hired 2,458 workers since commencing construction of the Orion mill and port site. This represents a 1762% increase over baseline provided in their Environmental Impact Study. This figure will continue to rise until December of this year where it is estimated that Botnia and its contractors will employ approximately 4000 people. The work force constructing the port at the Botnia Orion mill site is included in these figures.

Botnia's monitoring report identifies the origin of these workers to be 49% from Fray Bentos, 2.5% from other parts of Río Negro (primarily from the City of Young), 21% from the Region (Departments of Soriano, and Paysandú), 25% from other Departments, with another 2.5% being specialists from Brazil and Finland. Presently, 70% of the total number of workers are bussed daily to the mill site. According to the monitoring report, those that have immigrated to Fray Bentos have integrated well and have been welcomed by the local population. This observation was further validated during interviews with Officials in Fray Bentos during site visits in July 2006. According to the July 2006 monitoring report, the participation rate for the 20 to 29 age group increased 40%. Of particular note is the increase in the number of women working.

The operation phase will see approximately 300 workers at each mill site. Comments received on the draft CIS expressed concern that the majority of these workers will be high skilled and imported from Europe. This is not the case, as it is anticipated that approximately 10% of the work force will be non-Uruguayan. Training programs are ongoing to ensure that the majority of the operational positions are filled from within the area of influence. Botnia maintains a database of eligible workers that identifies their skill levels and availability for work. This database is available to contractors and to the Ministry of Labour.

Tables 28 and 29 (Annex III) provide an overview of the indirect and induced jobs anticipated as a result of the operation of the pulp mills. Table 31 (Annex III) provides a summary of the total number of jobs created during the operation phase. The operation phase will result in the creation of approximately 12,500 new jobs, of which only 600 will be provided directly by the pulp mills. An estimated 6,000 jobs of indirect employment would be created in other sectors of the economy such as forestry, and induced employment creation of almost 6,000 jobs, is estimated primarily in the service sectors.

For Uruguay the employment multipliers for the forestry sector are 0.0125 full time jobs per hectare and 0.0255 jobs per hectare if seasonal employment is taken into account. These multipliers and an estimated yield of about 25 cubic meters per hectare per year, would imply that it can be expected that an additional 1,845 full time jobs would be created as a direct result of the pulp mills. In addition about 1,900 part time jobs would be created.

The creation of new jobs in commerce and in services will reduce the relative importance of public employment in the region. In addition, opportunities will open up for self-employment and for small and medium sized businesses to serve the mills, related industries and the more affluent general population, requiring both skilled labour such as auto mechanics, and unskilled labour, such as cleaners.

The investment climate in Fray Bentos has experienced an improvement as a result of the ENCE and Botnia developments. New business have opened such as Avis-Rent-A-Car, and the Great Montevideo Store, Hotel Fray Bentos is under extensive renovations as a result of approximately $1.25 million dollar investment, and two new truck repair shops have opened.

As the economic climate continues to “boom” for Fray Bentos, a reduction in the number of small businesses or traditional retail establishments may be experienced as sales on a larger scale increase the possibility of larger, well established enterprises entering the market place within the area of influence. It was reported during interviews conducted in July 2006, that shops, many of which are family owned and operated, have extended hours of operation. This is a reflection of increased demand due to increased prosperity.

As the project progresses from the construction phase to the operation phase, there will be a change in the occupational patterns in the region, with a reduction in construction workers and increases in forestry, transportation and services. The increased demand for transportation workers will extend to drivers, mechanics, warehouse workers, and those engaged in the supply of fuel. Indirectly, an increase in the demand for workers in related service industries such as lodging, restaurants, bars, insurance, vehicle sales, and banking will be experienced in the area of influence. Table 31 in Annex III provides a summary of the number of indirect and induced jobs anticipated.

The good investment climate influenced by the operations of the pulp mills should result in the opening up of opportunities for self-employment by those that lost their jobs subsequent to the ending of the construction phase. It is not anticipated that unemployment levels will return to or be lower than pre-mill development (baseline) due to the number of indirect and induced jobs generated as a result of operations of the mills, as discussed above.

E5.1.4 Health

The cumulative impact on health care services will be experienced in the Uruguay area of influence, and not within the Gualeguaychú area of influence since the workforce will not be originating or moving to Gualeguaychú. It is anticipated that there will be an increase in the demand for health care services at all levels, particularly in Fray Bentos and its vicinity.

As with any major construction project, an increase in industrial accidents, in particular those involving multiple injuries can be anticipated. An increase in traffic accidents involving workers travelling to and from the site or in the transportation of raw materials and other goods, are also anticipated. There will also be an increase in sicknesses resulting from construction activities, an increase in stress as the pace of life in Fray Bentos quickens, and a potential increase in mental health problems, all of which will require an extension of presently available health care services and an increase in health service infrastructure.

It is anticipated that the influx of male migratory workers will result in an increase in the incidence of sexually transmitted diseases and pregnancy. This particular impact has the potential to impact men and women in area of influence in Gualeguaychú as well as in Río Negro.

Private health care will be needed for the workers in the mills, and their families, and for those employed in related activities. Both mill sites will provide emergency services on-site to address worker accidents and illness. An emergency clinic, including ambulance service, is currently operating at the Orion mill construction site, as illustrated in Figure E5.1-4. During a site visit to the Orion mill site in July, it was conveyed that all employees and sub-contractor employees are provided with personal protective equipment and safety training.

Figure E5.1-5: Health Clinic and Ambulance at Botnia's Orion Mill Site

During recent interviews, it was expressed that the implementation of the private health care for Botnia and ENCE employees and their families will decrease the existing pressure on the public system and result in overall better care for those using the public system. The July 2006 monitoring report did not show a change in the number of doctors practicing, the number of beds available, nor the number of specialists available; however, it did show a decrease in the number of users at the Fray Bentos hospital.
Although specific figures were not provided, according to the July monitoring report, the private health care system has already experienced investments from Botnia in its infrastructure, equipment and services. It has also experienced an increase in the number of users and consequently, the number of doctors.

There will be a diminished demand for private health care services as the permanent work force, and their families, will be correspondingly less than during the construction phase.

The decrease in the number of workers engaged by the mills should result in a reduction of industrial accidents and a change in the nature of the accidents that may occur.

The services (Figure E5.1-5) and infrastructure provided during the construction phase will continue to be available, thus resulting in a net benefit to the community and the health care system. Some employees previously covered by private health care while working at one of the mills, may become reliant on the public system causing an increase in demand for public services.

Figure E5.1-6: Fire Department at Botnia's Orion Mill Site

E5.1.5 Public Security

The cumulative impact in the area of influence on public security will primarily be experienced in Fray Bentos during both the construction and operation phases. Gualeguaychú may experience a slight increase in drunken and disorderly behaviours occasionally on weekends if construction workers, based in Fray Bentos go to the city for entertainment. Although this is plausible during any weekend, it is more likely to occur during Carnival or other festivals when there is a party atmosphere.

One of the cumulative social changes anticipated in Fray Bentos is that of a "sleepy" town growing into a bustling city. Typically as a population increases in a city so does the crime rate. Despite efforts to limit the influx of construction workers into Fray Bentos, by providing daily transportation for workers coming from neighbouring communities, the construction phases of the two mills will see the highest number of workers coming to Fray Bentos. Consequently, it is during this time that it is likely Fray Bentos will experience an increase of crime. The Consensus Building Institute reported that citizens were concerned with a rise in prostitution, venereal diseases, crime (robberies); and road accidents as a result of drunk driving. During interviews with officials in Fray Bentos in July, it was stated that the crime rate had decreased in Fray Bentos. It was suggested that the increased employment in the community has resulted in less idle time and consequently, less crime. The Project team was not able to verify this statement, nor does the Botnia July 2006 Monitoring report address this aspect. Initiatives are underway to address these concerns such as the hiring of six additional traffic police. Both Botnia and ENCE have developed community social plans to mitigate or address social concerns.

The operation phase of the project will result in a stabilization of the work force required by each mill. Fray Bentos will still benefit from those social services put in place to accommodate the construction phase. A potential increase in the crime rate may be experienced initially during the operation phase if workers from the construction phase are not assimilated into other employment opportunities.

E5.1.6 Housing

One of the significant cumulative impacts anticipated in the area of influence will be on the housing supply and mix. This impact is anticipated to occur only in Fray Bentos and not in Gualeguaychú. As stated previously, Gualeguaychú will not experience an influx of workers, consequently, additional housing will not be required in that City.

Several trends have already been observed in Fray Bentos, and documented in the July 2006 monitoring report. The cost of rental properties has increased and in some cases tripled from rents identified during the baseline study, the number of rental properties available has increased, and the demand for housing has increased. An indirect impact that has also been observed is the increase in the number of homes being renovated in order to accommodate rental units.

These impacts will more than likely spill out of Fray Bentos and into neighbouring communities within daily commuting distance of the mills in Río Negro and Soriano, but to a lesser degree. The City of Paysandú may also experience similar housing trends due to the increase in workers required to harvest and transport the eucalyptus wood to the mills.

Several housing development projects were observed during our site visit to Fray Bentos in July 2006, see Figures E.5-1-7 to 5.1-9. As a part of its community action plan Botnia is building a number of different types of accommodations for its work force.

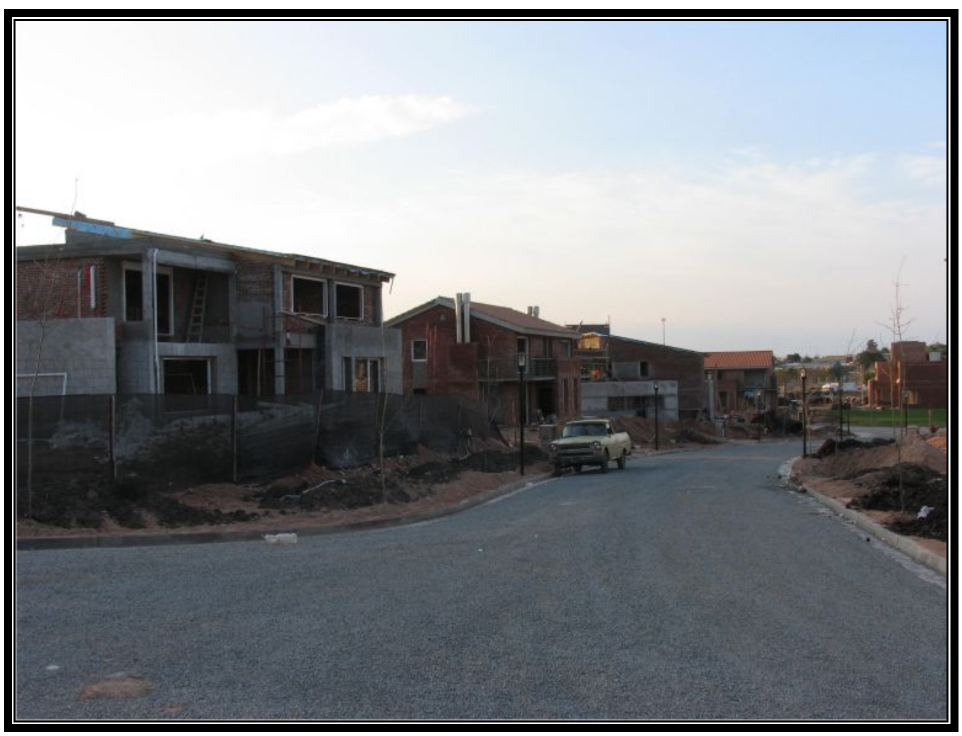

Figure E5.1-7: Botnia Housing Project in Fray Bentos

Figure E5.1-8: Botnia Employee Housing, Fray Bentos

Figure E5.1-9: Finished Employee Housing, Fray Bentos. Designed for single immigrant construction workers.

To address the demand for lower scale housing for workers brought in by the construction contractors, Botnia is constructing a number of units that can accommodate 6 workers each. Part of the houses are on rental bases but 110 houses are owned by Botnia and can also be used for Botnia´s own workers and their families during the first years of the mill operation. The housing development was planned in consultation with the Department of Rio Negro and will be integrated into the existing neighbourhood. Once the construction and start-up phases are completed, and workers return to their home communities, these homes will be given to the City of Fray Bentos.

In comparison to the construction phase, it is anticipated that there will be a reduction in overall housing demand and a corresponding reduction in the cost of renting. The City of Fray Bentos will acquire the new housing currently being built to accommodate the construction workers once it becomes surplus to the Companies. During our interviews in July 2006, the acquisition of these homes was expressed as a net benefit to the community, as the housing will be used to address any housing needs in the community at that time.

Concern was expressed during the review of the draft CIS that “shanty towns” would develop once the construction phase was completed and workers employment terminated. The “shanty town” phenomenon is a result of a concentration of workers living in semi-permanent dwellings in a concentrated area. Once out of work they continue to live in the dwellings. Over time, with limited resources, the dwellings fall into disrepair, crime escalates and other social problems develop. Due to the current company policies to provide adequate housing that will be acquired by the City once the construction phase is completed, it is not anticipated that a “shanty town” will develop.

Assuming tourism will continue to grow, tourists will further increase pressure on the real estate market in the summer months of January and February, as tourists place a temporary demand on rental accommodation.

The increase in construction activities in the region will generate an increase in the demand building supplies such as bricks, thus increasing their price, and providing greater income for brick manufacturers and suppliers.

The potential expansion of the city will increase land values and could result in re-classification as residential or industrial land uses.

E5.1.7 Transportation

Cumulative impacts on the transit and transport system within Uruguay will also be experienced as a result of the development of the mills. Due to goods and services, and workers being supplied to the mills from within Uruguay, it is not anticipated that the transportation system in Gualeguaychú will experience an increase in traffic.

In the Uruguay area of influence, there will be a significant increase in heavy vehicle traffic carrying construction materials, on main routes and on access roads to the mills.

The companies provide daily transportation to the mill sites for employees living within commuting distance (Figure E5.1-6). This transportation service is contracted out to local bus companies, thus helping to alleviate concerns with regard to unsafe transportation of people, and the number of passenger vehicles and motorized bicycles using the highways/roadways. It is possible that the mills will monopolize the bus companies to the extent that other users, such as schools will not be able to hire an adequate number of buses.

Figure E5.1-10: Botnia Buses: Employee Transportation

Despite the supplied transportation for workers, an increase in the number of vehicles on the road will be experienced. The July 2006 monitoring report indicates that there has been an increase in the number of registered cars, motorcycles and mopeds. It was reported that in June, sales of mopeds reached an average of six per day in Fray Bentos. This is reflective of an overall increased level of prosperity in Fray Bentos.

In response to both the increase in traffic and the increase in the number of drivers unfamiliar with traffic laws and safe driving practices, Fray Bentos has hired six additional traffic officers. In co-operation with local schools a traffic safety program has been developed for school children. An increase in the volume of traffic may result in an increase in the number of the traffic accidents involving other vehicles and/or pedestrians as both drivers and pedestrians adjust to the increased traffic. It will take a period of adjustment while residents and drivers, alike, not accustomed to traffic learn safe practices and become aware of each other.

In the last year, two car rental companies have located in Fray Bentos: Multicar and Avis. The demand for this new service stems from both business and to a lesser extent personal use.

There will be a higher probability of road accidents as truck traffic related to the operations of the mills will require the movement of about 400 large vehicles per day to supply the mills at full production with raw materials. Continued education aimed at traffic safety for children and adults will help alleviate this impact.

ENCE is proposing to use the railway system to transport wood from the plantations to the CMB mill site. The existing railway infrastructure requires significant improvements before this can occur. Using the railway to transport raw materials from the plantations will decrease the use of transport trucks, thus decreasing the risk of traffic accidents, and the quantity of vehicle emissions. The railway system; however, will potentially contribute to other forms of traffic accidents involving trains and vehicles or pedestrians at all at-grade road crossings.

During operation, the ports will experience a regular schedule of shipments of products, resulting in a stabilized workforce to service the ports.

E5.1.8 Landscape and Visual Setting

The cumulative impact of the mill sites on the landscape and the visual setting will be experienced in the Gualeguaychú and Fray Bentos area of influence. The change to the landscape is a permanent impact; however, the public's response to the new landscape is subjective and may potentially change over time as the public becomes accustomed to the new landscape. Both sites are located adjacent to the Río Uruguay and in predominately pastoral lands. Both sites are also visible from the International Bridge. Figures E5.1-11 is a spatial map depicting the location of the mills in relation to the communities of Fray Bentos and Gualeguaychú and their beach resorts. Figures E5.1-12 to E5.1-15 show the view from approximately half-way across and, at the highest point, of the International Bridge. It is unlikely that the sight of the mills from the Bridge will discourage tourists from continuing on to Fray Bentos, Las Cañas or other locations in the region. Two case studies are provided that discuss the ability of pulp mills to co-exist with tourism features. This discussion is provided in Section E5.2.5. The Orion mill stack is a significant intrusion onto the landscape. Figure E5.1-16 shows a similar pulp mill in Spain to provide a better understanding of how the mills will look during operations.

Figure E5.1-11: Spatial Map

Figure E5.1-12: View of Botnia's Orion Mill Site from high point on the International Bridge

Figure E5.1-13: Bridge Location where above Photograph taken

Figure E5.1-14: Looking upriver toward ENCE's CMB Mill site and port from high point on the International Bridge

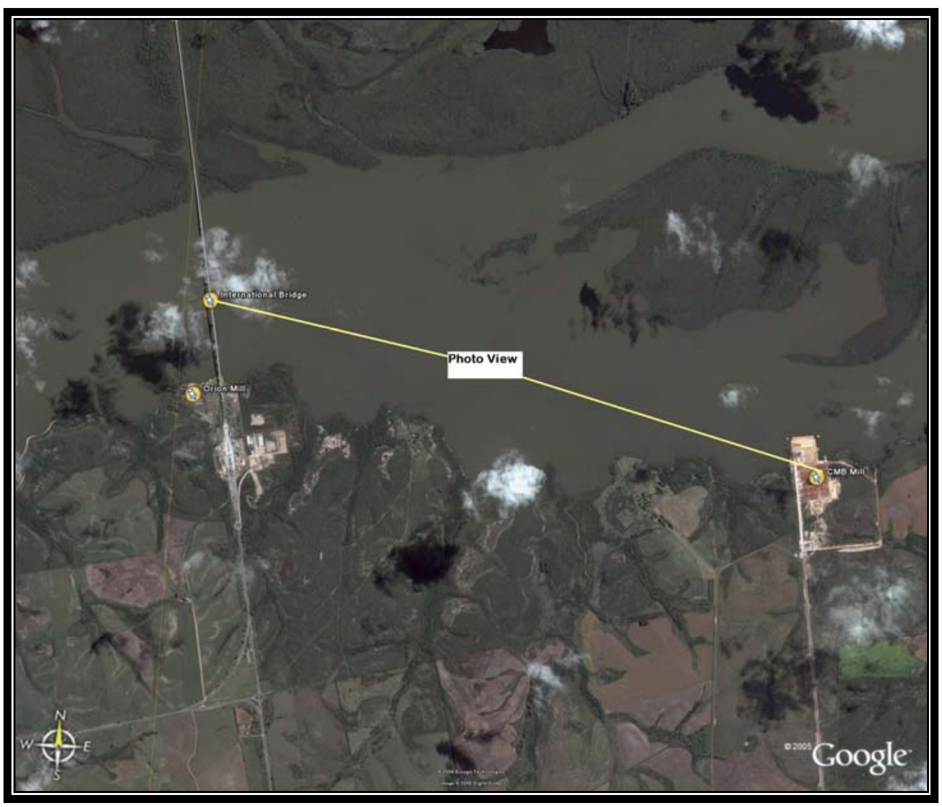

Figure E5.1-15: Bridge Location where above Photograph taken

It will not be the first time in the history of Fray Bentos that a smokestack has acted as a land mark. This year the Anglo smoke stack is celebrating its 100th anniversary, and although it is not as obvious on the landscape as the new stack at the Orion mill site, many residents of Fray Bentos value it as a reminder of the proud history of the meat processing industry in Fray Bentos. It is perhaps, in part, due to the memory of this smokestack as a large black-smoke emitting eyesore to those across the river that contributed to some of the concerns from Gualeguaychú pertaining to the pulp mills. The proposed mills; however, will not be emitting “black smoke”. There is no visible plume from the stacks in modern pulp mills, except for a white steam plume in cold, humid weather. Figure E5.1-16 of the ENCE Mill in Spain depict this white water vapour.

Figure E5.1-16: ENCE Mill Operating in Spain

In Gualeguaychú, the closest and most visual mill site is that of Orion, located 13 km across and upriver from the beach resort of Ñandubaysal. Although it is new to the landscape, its visible physical presence is far enough away as to be unlikely to cause loss of enjoyment of the beach area for all but the most sensitive users from a visual standpoint. During peak season, January and February, at Ñandubaysal, the river is used for water sports (jet skis, sailing, board sailing, boating, etc). Due to the heavy use of the river for water sports, the Orion mill will be less noticeable due to these activities on the river; however, the visual impact of the mill will be heightened for those out boating on the river.

At night, looking across the river, lights from the Orion mill will be visible at the beach. Due to the distance and the mills proximity to other existing light sources, namely the International Bridge and the community of Fray Bentos, the impact of lights to people strolling along the Ñandubaysal beach is considered low and is not anticipated to impact significantly on their experience.

E5.1.9 Impacts on the Quality of Life

There will be changes in the quality of life for the population in the area of influence, most notably in Fray Bentos and in the surrounding area. The pace of life will increase with the influx of outsiders into the area, there will be an increase in traffic, noise, tourism and commercial activities. As Fray Bentos continues to develop, new opportunities will be created, making the city more attractive to youth and young adults. The out-migration of youth will decrease as these new opportunities develop.

Perhaps most noticeably will be the increased overall affluence experienced by many in Fray Bentos and the region. Increased affluence creates new choices related to improved living conditions, purchasing power, education and health care.

There will be a greater demand for, and supply of, cultural and recreational events and activities. These activities will be induced by market forces and regulated by the local institutions.

The increase in accommodation rentals will potentially lead to an overall increase in the cost of living in the city of Fray Bentos and in neighbouring localities.

With the increasing population, it can be expected that there will be a rise in incidents of anti-social behaviour and in crime.

There will be a tendency towards greater social stratification in the city of Fray Bentos with the influx of operational personnel for the mills and other related industries in the higher social and educational categories.

It is possible that there will be fewer job opportunities for the population in the area of influence during this phase; however, the long term presence of both mills will result in an overall more prosperous economy that attracts other forms of investment. The community benefit from improved health care, education opportunities, and infrastructure. Investment in recreation and cultural activities will also be experienced during the operation phase, two indicators that contribute to an improved quality of life.

The beginning of the construction works generated an increased feeling of vulnerability and distress concerning the potential negative effects of the mills for the residents of Gualeguaychú. During this period, the conflict between Argentina and Uruguay escalated generating a negative impact. Posters, banners, pins and scarves sprang up in public places in Gualeguaychú as shown in Figure E5.1-17.

Community groups formed and banded together with other environmental groups creating a strong unified front. This co-operative approach is a positive aspect for the community, since it has generated a citizen mobilization around concern for the environmental.

It also created pressure to display the opposition banner or sign regardless of one's view or position, tending to make it socially unacceptable to take exception to the prevailing views of ACAG and opponents to the mills.

**Figure E5.1-17:	Posters, Banners, Pins and Scarves in Public Places in Gualeguaychú**

E5.2 Economic Indicators

According to the Economic Impact Study prepared by Malcolm Pirnie (November, 2005) and provided in Annex III, the economic impact of the mills will be equivalent to about 3.2% of 2004 GDP over the three years of the construction phase and about 2.5% of 2004 GDP in each year of full capacity production. The impact on Gross National Product (GNP) is estimated to be 2.8% for the entire three-year construction period and 1.5% for the years in which the plants are operating at full capacity. Table 1 in Annex III provides an overview of the cumulative economic and employment impacts for the Orion and CMB pulp mills.

The Department of Río Negro will receive the majority of the impacts, equivalent to more than the entire gross departmental product in 2003 for construction phase and for each year of full capacity production during the operational phase. The economic impacts will still be significant, though less, for the neighbouring departments of Soriano and Paysandú.

The cumulative impacts on the livelihoods that depend on natural resources are discussed below. Of those discussed, agricultural and forestry activities also contribute significantly to the GDP. For example, estimated forestry sector exports for 2004 reached USD 253 million (Botnia, 2004).

E5.2.1 Agricultural Activity

The cumulative impacts are anticipated to be experienced predominately in the Uruguay area of influence. It is not anticipated that the construction of the mills will impact negatively on existing farming activity in the Fray Bentos area, as both project sites are located on properties designated for industrial development. The influx of workers and their families during construction phase will result in increased demand for fresh fruits, vegetables, dairy and meat production from community markets and shops. This increased demand will benefit both shop owners and farmers.

During the review of the draft CIS, concern was expressed that agricultural land, and consequently, farming activity would be displaced by the plantations required to supply the mills with eucalyptus trees. This is a trend that has been occurring since the Uruguayan government identified the development of the forestry industry as a National economic development strategy. As presented in the Botnia EIA, forestry plantations surpassed the expectations of the Forestry Development Plan in a short period of time. The annual plantation rate peaked in 1998 at 75,000 hectares.

In Annex B of the Cumulative Impact Study, the wood supply requirements and sourcing for the two mills is discussed. After reviewing the annual combined requirements of the mills and the estimated number of hectares presently planted or planned for future planting, the supply within the Littoral Region of Uruguay is sufficient. It is highly unlikely that additional land within or outside of the Littoral Region will be converted from grasslands or agriculture to eucalyptus plantations to produce pulpwood for the mills.

In discussion with a FOSA representative, a plantation company affiliated with Botnia, it was explained that their plantation holdings are purchased from large landowners, many of which are based in Montevideo or reside out of the country. Land designated by the government for forest plantation development is classified as poor or unsuitable for agricultural use, as discussed in Annex B. There was no evidence that small farming operations were being displaced by current operations, nor that they would be during operation of the mills when demand for eucalyptus increases.

Plantations also are compatible with cattle grazing. For agricultural operations located in the area of the plantations, larger plantation companies such as FOSA have a policy of renting out land for cattle grazing that is either not in forestry production or is in early stages of growth. Grazing restrictions occur during harvesting of the trees (for obvious safety reasons) and during the first two years after the nursery stock is planted. This co-operative approach to land use in the designated plantation areas is a positive long-term impact of the forestry industry on agriculture.

The operation of the mills is not anticipated to impact existing agriculture in the area of influence. In the Fray Bentos area, a decrease in food products purchased will be experienced compared to the quantities purchased during the construction phase.

In Paysandú and other areas that supply the mills with raw materials, the operation phase will result in increased harvesting and transportation of wood. All aspects of the forestry industry will experience growth (nurseries, planting, harvesting, and transportation) as the demand increases and eventually stabilizes during the operation phase.

Employment projections of the number of jobs generated per hectare, compared to forestry activities is provided and discussed in Section E5.2.3 below.

E5.2.2 Fishery Resources

The cumulative impact of the mill sites on the fishery resource will be experienced in the Gualeguaychú and Fray Bentos area of influence. The baseline fishery resources and potential cumulative impacts from the mills are discussed in Annex D of the Cumulative Impact Study.

It is not anticipated that the construction of the mills will have any significant impact on fishing activities in the Uruguay River. During construction of the Botnia port, turbidity of the water may increase; however, due to the presence of bottom dwelling species such as catfish, in that location it is not anticipated that quantity or type of fish resources will be impacted.

A positive impact is the potential for increased demand by local markets for fish for consumption, which would result in an increase of business (and, consequently, income) for local fishermen.

The analysis discussed in Annex D on the potential impacts during operation of the mills on water and fishery resources indicates that the predicted effluent plume is extremely small under worst case conditions. This small plume will not impact the fisheries resource in the Río Uruguay. The type, abundance and health of the fish within the Río Uruguay in the vicinity of the discharge is not expected to change as a result of the mills.

A limited amount of nutrient enrichment of the sediments may be experienced within the immediate vicinity of the effluent discharge diffuser of each mill (extending the length of the diffuser and for several tens of metres outward). Within this small area, the benthic community may change somewhat but only in terms of species type not necessarily abundance. This means that the fish food may change slightly in this area. These conclusions will be confirmed through the environmental effects monitoring (EEM) program. In Canada, the EEM program would not require monitoring of fish for such a small plume as it has been demonstrated that such a plume will not affect fish.

CARU and DINAMA both identified that the fisheries resource is impacted by other activities, such as the Salto Grande dam, and industrial activities in the Río Parana. The Salto Grande dam restricts migratory access to the headwater streams where many species of fish spawn. CARU further identified that the spawning and nursery areas are mainly on the Río Parana. The Río Uruguay at Fray Bentos is mainly a feeding ground for adult fish. This means that any impact identified through monitoring will only be measuring impacts on fish originating from the Río Parana.

As reported by The Consensus Building Institute, fishermen on both sides of the Uruguay River expressed concern with the future of the fishery resource. Those interviewed indicated that both Botnia and ENCE had consulted with them concerning their personal experiences and the health of the fishery resources; however, they lacked a clear vision as to how their day-to day fishing experiences may change as a result of the addition of two pulp mills. It is not anticipated that local fishermen will experience a change to their daily fishing experience as a result from the operation of the mills.

E5.2.3 Forestry Production

The cumulative impact to forestry production will be experienced in the Uruguay area of influence only. In order to provide sufficient raw materials for the pulp mills, new areas will be developed for plantation forestry. This increase in land dedicated to forestry will not have an important impact on overall land use in the area of influence, or in the country as a whole. The Forest Producers Association of Uruguay has estimated that for the year 2010, taking into account the needs for the new mills, there will be an increase of about 30% in the National area dedicated to forestry. The total area will increase from the present 645,330 hectares to about 800,000 hectares.

The increase in the amount of forestry lands will occur predominantly by owners of large properties, at present dedicated mostly to cattle ranching, reducing the amount of their land dedicated to cattle grazing. The increase in plantation lands will not be at the expense of small scale farmers. It can be expected that medium sized farms might diversify to plantation forestry to expand their economic opportunities

The increase of forestry activity will generate an increase in employment in this sector, which according to the Forest Producers Association of Uruguay could double present forestry employment, from 10,110 persons employed in 2003 to 19,019 in 2010.

Regardless, many dispute that increased forestry operations have and will provide more jobs than previous farming activities. According to DIEA, Dirección de Estadística del M.G.A.P. (Statistical Office of the Agricultural, Cattle and Fishery Ministry), for the year 2003, the permanent workforce occupied by Forestry averaged 7 people per each 1,000 hectares, compared to cattle raising and breeding which occupied between 1.96 to 2.65 people per 1,000 hectares (Pirnie, 2005 and Annex B).

From the web page of the MGAP (Informe “Puestos de trabajo en la fase Agraria Forestal) utilizing the data from the 2000 Farming Census and relating them to the ones existing in the MTSS (Labor Ministry), the Forestry complex generates 7.98 permanent jobs per 1000 hectares in the agricultural phase, not taking into account tree nursery operations. Using these same reports and figures and crossing them with technical coefficients, the final estimate will be in the order of 11 jobs generated per 1,000 hectares including all nursery activities.

To these figures one must add the intra-forestry cattle grazing activities carried out in many plantations. This practice such as ENCE’s which generates one extra direct and permanent job per 1,000 hectares. These data clearly show that forestry has the potential for generating between four to five times more jobs than cattle raising.

With respect to ENCE’s forestry division EUFORES, averaging the occupational data of its own and its subcontractors’ personnel with the forested area for the year 2005 and the first semester of 2006, 13 direct jobs were employed per 1,000 hectares (not including intra forestry cattle grazing.

According to the information provided by Mr. José P. García de León, from FOSA, in July 2006, the company provides 228 direct jobs and 1,246 contract positions. Their total forestry holdings are 134,000 hectares, of which 80,000 are suitable for planting and 66,000 are already planted and in production.

FOSA maintains a policy of purchasing 30% of their lumber needs from small forest producers[5], in order to enhance the development of independent forestry industry. FOSA also provides training programs and technology transfer and assistance programs to small business to ensure the security of their wood supply.

E5.2.4 Beekeeping

Cumulative impacts to honey producers are not anticipated within the area of influence on both sides of the river. Bees typically gather nectar within a range of 3.5km of their beehives. The analysis on the cumulative air emissions (discussed in Annex C) indicates that with the mills observing all pertinent environmental regulations, negative impacts on honey producers are not anticipated in the Department of the Río Negro, Soriano or Gualeguaychú.

As discussed earlier, beekeeping in Paysandú, is a thriving export business that relies on eucalyptus trees to supply a portion of their honey.

Beekeepers within the Gualeguaychú area of influence reported the loss of over 9,000 bees during an interview conducted by the Consensus Building Institute. It was not identified where this occurred; however, it would be prudent to further investigate this claim and the cause, prior to mill start up, in order to further refine and accurately describe the baseline conditions.

E5.2.5 Tourism

Cumulative impacts to tourism are anticipated within the area of influence on both sides of the river. Many stakeholders have expressed concern over the possibility of offensive smells originating from the mills, the presence of large-scale industrial enterprises and the increase in heavy truck traffic could deter some potential visitors to the area of influence.

The number one influence on the tourism industry and specifically on Las Cañas beach resort and Ñandubaysal Resort would be any impact of air emissions and water effluent from the mills to the visitor's experience. Review and analysis of current studies on water quality is discussed under impacts to water and fishery resources in Annex D. The review and analysis of current studies on air quality is discussed in Annex C. These studies indicate that no adverse air or water impacts will be experienced at Las Cañas or the Ñandubaysal Resort across the river.

Gualeguaychú does not rely on visitors from Fray Bentos or Uruguay; most of its visitors come from within Argentina. Given the current attitude among Argentines toward the mills and as a result of the strong opposition and bridge blockade during the 2006 peak tourist

[5] FOSA has the right of first refusal.

season, tourists from within Argentina may look to other destinations to provide the same or similar beach or Carnival experience.

Tourism in Gualeguaychú and Ñandubaysal beach may experience an increase in international tourism from Fray Bentos as a result of new workers and families moving to the community and because of an overall increased affluence within the community. Although, traditionally not a lot of tourists come from Fray Bentos, increased marketing efforts may attract additional Uruguayans to the Thermal spas, Carnival celebrations or the beach resort. Restaurants, bars, hotels and retailers may also experience increased sales as a result of increased affluence in Fray Bentos.

During the operation phase of the mills, the tourism industry in the Uruguayan area of influence may suffer a decrease in the number of people circulating in the area of influence; however, the industry may be able to maintain the gains made during the construction phase, by actively marketing existing and new tourism offerings. Marketing efforts that focus on any new cultural and recreational activities developed during the construction phase will help to attract visitors from within Uruguay.

In Río Negro, there is a potential opportunity to generate new types of tourism that will compensate for the highly seasonal nature of the industry, being mostly related to the “sun and beach” and limited to approximately two months of the year. The initiative by ENCE in setting up a nature reserve area, or zoological garden, adjacent to the CMB mill site, which has an impressive stock of fauna in danger of extinction, has already attracted many visitors to the zone, including large numbers of school children.

The possible actions from opposition to the installation of the mills on the part of the citizens of Gualeguaychú during the 2006 summer months could generate an adverse climate for continued increases in the number of Argentine tourists visiting Uruguay. In addition, sustained opposition and the associated negative information campaign may harm tourism in both Uruguay and Entre Ríos.

As stated above the results of the air quality analysis and water quality analysis is provided in Annex C and D, respectively. In summary, those vacationing at the Las Cañas beach will not experience a negative change in water quality, both in terms of aesthetics and health; however, it is anticipated a net benefit to water quality will be experienced. The beach is also located downstream from the municipal discharge for the community of Fray Bentos. The contribution of phosphorus and bacteria along the shores from this discharge is predicted to be 0.005 mg/L and 30 F.C./100 mL, on average, and potentially considerably higher during heavy rainfall. The treatment of the Fray Bentos discharge by the Botnia Orion mill will eliminate this source of wastewater pollution to Las Cañas.

Computer modeling of air emissions carried out for the individual environmental impact assessments and for this cumulative impact study, indicates that there will be no significant impacts to air quality in the region. Odour is the main air quality parameter of concern with regard to tourism. Both mills have included advanced technology to capture and eliminate these odours.

Odour will not likely be detectable under normal operating conditions on or immediately adjacent to the mill properties, at Fray Bentos, or the International Bridge (Uruguay and Argentina sides). Odour may be detected under upset conditions at Fray Bentos and the International Bridge (Uruguay and Argentina sides); however, fewer than ten detection events are expected per year based on operating experience at other modern mills, and only a few of these may be considered objectionable by someone with a sensitive sense of smell. The detection of odour does not represent a health concern since the 24-hour concentration of TRS is well below the WHO criteria, although, people on or near the site may notice a sewer type smell or, on occasion, a stronger unpleasant smell. During the first year of operation, it is possible that the NCG system may vent to the atmosphere on occasion for minutes to possibly hours at a time until the collection system is fully functional, after which venting will be limited to a few seconds to minutes in duration.

Odour will not be detectable at tourism areas of Las Cañas (Uruguay) or Ñandubaysal Resort (Argentina) under normal operating conditions, but during upset conditions and times of poor air dispersion, the odour effect level is predicted to be above the detection threshold for a person with a sensitive sense of smell. This means that during an upset someone at the beach resorts may detect an odour similar to that experienced in daily life (such as garbage, a poorly tuned car, a sewer) but may not be able to characterize its source. This occurrence is most likely during pre-dawn when air dispersion is poor, and may occur up to ten times per year based on operational experience at modern mills.

Based on the results of the air quality analysis (Annex C) there should be no significant impact on tourism in these areas from odour, cumulative or otherwise.

It is also possible that the presence of the mills will create a niche tourism market for those visitors interested in industrial sites. In Europe, some of the pulp mills operated by both ENCE and Botnia attract thousands of visitors a year with guided tours of its facilities.

A study was conducted to assist with the analysis of potential impacts on tourism from pulp mills in the region. Although an extensive search of databases was conducted not many relevant examples were found. Two relevant case studies that were, one in British Columbia, Canada and one in Pontevedra, Spain are discussed below. The air effluent and odour emissions for the Canadian case studies are higher than the levels anticipated at the new mills.

PULP MILLS AND TOURISM: INTERNATIONAL EXPERIENCE

Case 1: British Columbia, Canada[6]

There are 24 pulp mills in British Columbia that range in age (some almost 100 years old), within 15 to 20 kilometers of significant tourist activities, associated with natural scenic beauty, aquatic activities, camping and festivals or carnivals. There are 5 pulp plants on Vancouver Island, 6 in the northern part of the province, 5 in the central part and 8 in the southern British Columbia. BC pulp mills have upgraded their environmental protection systems over the years, but not to the level of sophistication proposed by ENCE and Botnia for the CMB and Orion pulp mills.

Combined, these plants have an annual capacity of about 8 million tons, 30% of Canadian production. The province exports about 6 million tons of pulp, or about 55% of the Canadian pulp exports.

It is estimated that tourism contributed about C$ 5.3 billion to the Provincial Gross Domestic Product (PGDP) in2004, equivalent to about 3.7% of the total PGDP. There were nearly 22.5 million visitors to tourism destinations in the Province in that year, who spent about C$ 9.5 billion. In 2005, there were 22.9 million visitors accounting for tourist revenue of C$ 9.8 billion.

Pulp mill production and tourism coexist, due to technological and safety standard improvements, particularly in the 1980s and 1990s in mill operations, prompted by a combination of citizen pressure, legislative action, strict enforcement laws and responsible safety and environmental measures taken by the mills.

Stakeholder involvement with the mills in the form of citizens´ forums and the prompt response by mills to legitimate complaints has significantly reduced friction between the mills and the inhabitants of cities and towns where mills are located.

Complaints about a high degree of smell and water discharges that endanger fishing and aquatic activities have been substantially eliminated in recent years, although there are exceptions. One such exception is at Prince George, where the air quality suffers more than at most sites. The layout of the city is similar to that of a bowl; consequently, an inversion occurs, causing air quality issues. Although these occurrences are happening less often and less intensely than in former years, the occurrences are still more frequent than in other mill locations. There are also some isolated claims of harmful effects on wildlife.

[6] Tourism sites within the proximity of Pulp Mills. Examples from British Columbia, May, 2006;

Modern techniques of continuous testing of air and water emissions are reported to catch most accidents as they occur, and as standards have been rising over the past decades, the incidents have become very infrequent and tourism officials were unable to identify incidents impacting on tourist activities.

Tourism exists at practically all pulp mill towns in British Columbia, and the quality of water discharges from the mills are rigorously controlled and hundreds of thousands of salmon run within the area of influence of the mills, in particular those at Elk Falls (Campbell River), Nanaimo and Crofton on the east coast of Vancouver Island. No reports could be found of fishing tourism being deterred by the presence of the mills.

Many of the British Columbia pulp mills have mill and forestry tours, which are heavily subscribed to in the summer months.

Figures E5.2-1 and E5.2-2 show the pulp mills locations and the most important tourist attractions on the region.

Vancouver Island, in British Columbia has one of the world's most diverse ecosystems: rainforests, marshes, meadows, beaches, mountains, oceans, rivers and lakes create habitats for multitudes of wildlife species. In fact, the region is one of the world's premier locations for whale watching, birding, as well as salmon and trout fishing.

Much of the island has been protected as parkland. It contains many pockets of old-growth fir and cedar forests, as well as rare, naturally occurring groves of Garry oak. The Beaufort Mountain Range bisects Vancouver Island, north to south, which is home to one of Canada's biggest all-natural ski bases.

Vancouver Island has 5 pulp mills and there is resistance to them by resident retired persons, who feel that their existence of them intrudes on their natural environment.

Despite this, most tourists are unaware of the presence of the mills and no reports could be found of fishing tourism being deterred by the presence of the mills.

Figure E5.2-1: British Columbia Tourism Features

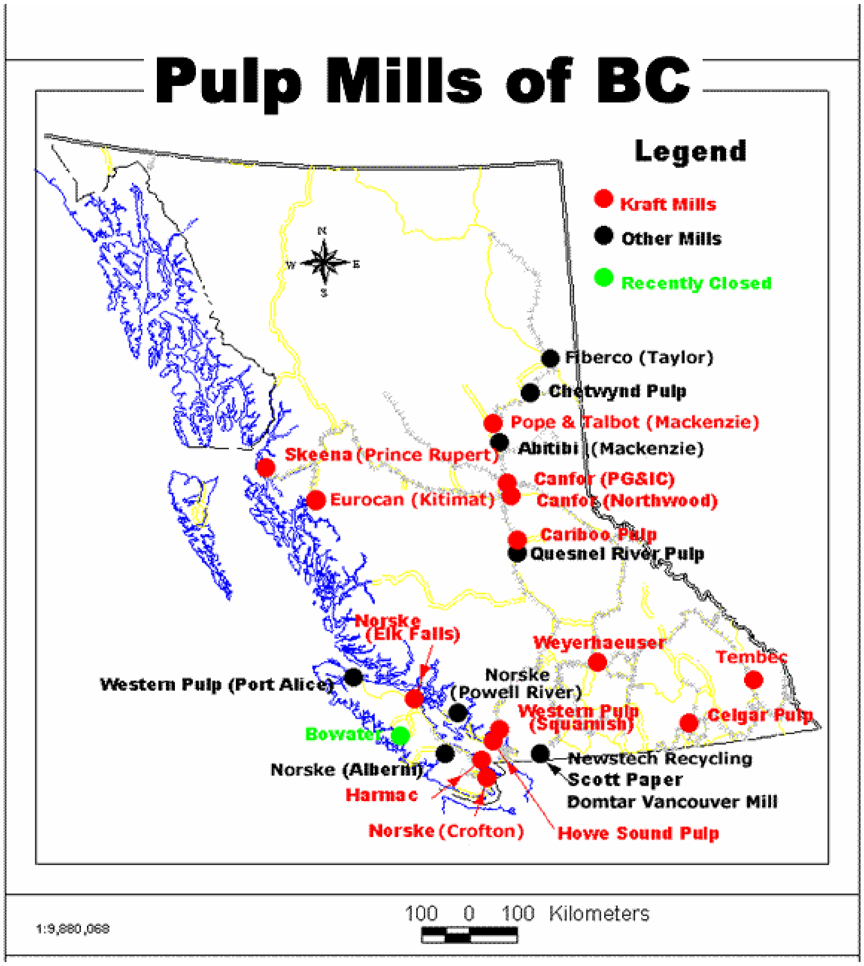

Figure E5.2-2: British Columbia Pulp Mill Locations

Prince George (population: 72,406) is located at the confluence of the Fraser and Nechako Rivers, in the center of British Columbia. Many travelers make it a base for holidays that emphasize outdoor activities such as hiking, canoeing or fishing. The city is home to the region's top university, art gallery and professional theatre company. The primary economic drivers in Prince George are forestry and wood products.

The city has 3 pulp mills, all owned and operated by Canfor Corporation and within 8 kilometers of the city center and within 10 kilometers of most local tourist activities. The 3 pulp mills were built between 1965 and 1968 and produce nearly one million tons of pulp. At present, there are occasional odor problems, but not as frequently as in the past.

The mills have odour control systems that comply with Canadian regulations, but are neither as complete, nor as well backed-up as those proposed for the Fray Bentos mills. The Prince George mills use the ASB effluent treatment process, which is well known to release substantially more malodorous gasses than the AST process, proposed by ENCE and Botnia.

Kamloops (population: 77,281) is located in south-central British Columbia, at the confluence of the North and South Thompson Rivers. The third largest city in the BC interior and the "Tournament Capital of Canada," it maintains 84 municipal parks and world-class sporting facilities. The more than 2,000 hours of sunshine each year, combined with an average summer temperature of 27.2°C (81°F), encourages rapid plant and fish growth in the more than 200 lakes within an hour's drive. The area is widely recognized as a freshwater fishing hotspot. The landscape is quite variable. In addition to hundreds of lakes, there are many areas of dry forest, hilly areas that are largely treeless and grasslands that support several endangered species.

There has been a bleached kraft mill in Kamloops since the 1960's. The mill was upgraded in the 1990s and currently produces approximately 400,000 tonnes per year. A ECF bleaching process is used with odour control systems; however, these environmental protection systems are neither as advanced, nor as efficient as those proposed for the Fray Bentos mills. The Kamloops mill uses the ASB effluent treatment process, which is well known to release substantially more malodorous gasses than the AST process proposed by ENCE and Botnia.

Case 2: Pontevedra, Spain[7]

The discharge point of ENCE pulp Mill in Pontevedra, is located 8 km. upstream from the north of Spain's most important tourist centre: Sanxenxo.

Sanxenxo, summer tourist center, with 17,000 inhabitants, has evolved in parallel with the plant's presence and has been unhindered by it.

According to a report from Sanxenxo municipality, this destination sees 500,000 visitors per year, in seven 4 star hotels, twenty 3 star hotels, fifty-two 2 star hotels plus parahotels and camping facilities. The hotels offer 6,264 beds, and growth of 4 star accommodation has occurred from 121 beds in 1999 to 954 beds in 2005. During high season, the level of occupancy usually reaches 100%, with an average length of stay of 7 days.

The repeat visitors rate has grow from 37.12% in 2003 to 44.8% in 2005.

The Municipal officers attribute the growth in the number of tourists in recent years to improvements to water availability and sanitation. A commitment to improving the quality of the water effluent has resulted in company complying with the Eco management and Eco audit of the European Union.

[7] Evolución del Turismo en el Departamento de Sanxenxo

Not only has the number of tourists grown but an increase in the number of beaches qualifying for "blue flag" certification has also been experienced. The "blue flag" qualification is awarded by the European Union to those beaches with high environmental quality.

From 1987 to 1999 only one "blue flag" beach was available at Sanxenxo. This number jumped to approximately 11 blue flag beaches in 2006.

E6.0 CONCLUSIONS AND RECOMMENDATIONS

E6.1 Conclusions

The transboundary cumulative impacts relate to the mills meeting all environmental standards for air and water effluent emissions. If the mills operate as proposed, no negative transboundary impacts related to agriculture, fishery resources, beekeeping and tourism are anticipated. Positive impacts are anticipated to the forestry sector in Uruguay, as the mills will result in increased demand for raw materials. Other positive impacts are anticipated for agriculture, fishery resources and beekeeping as the demand for food products (meat, vegetables, citrus, fish, honey, etc) will increase significantly during the construction phase.

Other cumulative impacts anticipated relate to the increase in the population in Fray Bentos. An increase in the population will cause a ripple effect in the community including an increased demand for housing, increased rents, increased demand on health care facilities and services, a change in the quality of life, an increased stress on infrastructure and traffic.

During operations, transportation of raw materials from the plantations to the mills will significantly increase truck traffic on the national highways and local roadways. The increase in traffic is a negative impact due to the potential for increased risk of vehicle/pedestrian accidents.

Positive cumulative economic impacts will also be experienced and ripple through Fray Bentos, Río Negro, Soriano, Paysandú, and Uruguay. Direct, indirect and induced economic impacts will be experienced during the construction phase and to a lesser degree during the operation phase. These impacts are related to employment, provision of supplies and goods, creation of new businesses and increased investment in Fray Bentos and Río Negro, and increased export contributions.

Perhaps one of the most significant and potentially long term social impacts experienced is the deterioration of the relationship between the countries of Uruguay and Argentina and specifically the communities of Fray Bentos and Gualeguaychú. As referenced in various sections of this report, strong opposition to the projects resulted in a three month long blockade of the International Bridge. The blockade increased travel time and inconvenience to commerce truck traffic and loss of tourism to Fray Bentos. The blockade also risks, at least temporarily, damaging the image of the region as a desirable tourist destination.

From anecdotal information the relationship between the two cities has traditionally been positive. It is not unusual to find siblings living on both sides of the Río Uruguay. During one interview, it was noted that a Uruguayan family member living in Gualeguaychú felt discriminated against by native Argentines. The blockade was carried out during the peak summer months starting in December, thus causing significant economic losses to the tourism industry in Fray Bentos.

In addition to the economic impacts, the attitudes between the communities appear to have suffered as well. During interviews in Fray Bentos, one of the stakeholder groups expressed that it is their right to have access to employment and to healthy economic development, inferring that Argentina was trying to deny them of that.

ENCE has commissioned a sociologist to study the impact of what is referred to locally as the "crisis" on public attitudes within Fray Bentos toward their Argentine neighbours. This study should be available in October/November 2006.

E6.2 Recommendations

A monitoring program will assist decision makers at the Mills and social agencies and services within the area of influence to identify changes based on the baseline data presented in the Company EISs. Botnia has already commenced a detailed monitoring program based on a number of social indicators. Due to the projected cumulative impacts that have been identified, it is critical that both Companies work co-operatively in collecting the monitoring data and responding to social changes in a responsible and effective manner. It is important to note that the companies do not work in isolation, many social stakeholder groups are required to participate in order to ensure positive impacts of the projects are enhanced and negative impacts are minimized. Some of the key social indicators are provided below.

A joint monitoring effort with key stakeholders in Gualeguaychú is also recommended as identified in the Table E6.1 below.

Table E6.1: Key Monitoring Indicators

Indicator	Sub Indicators	Monitoring Location	Frequency
Housing	Supply and demands for serviced housing	Fray Bentos, Mercedes, Paysandú, Young	Semi-annual
Policing	Crime rate Types of crime Traffic accidents	Fray Bentos Gualeguaychú Paysandú to Fray Bentos	Quarterly Quarterly
Health Care	Public health care system (hospitals, clinics, doctors, no. of patients, etc.) Private health care (hospitals, clinics, doctors, no. of patients, etc.)	Fray Bentos, Río Negro, Paysandú	Quarterly
Education	Enrolment in all schools, facility and programming changes Graduation rates	Fray Bentos, Río Negro	Quarterly
Employment	Employment figures No. of new business start-ups and employees.	Río Negro, Paysandú, Soriano	Quarterly
Tourism	Number of visitor, characteristics, origin and length of stay, economic contributions. Product offerings	Fray Bentos, Río Negro Gualeguaychú	Annual
Fishery Resources	Economic contributions, No. of fishermen, Market demand	Fray Bentos, Mercedes Gualeguaychú	Quarterly
Farming Resources	Economic Contributions No. and size of farming operations, type of products Market demand	Río Negro, Soriano, Paysandú	Annual
Bee keeping	Number of Producers, location and number of beehives, and bees, Volume of Honey production	Fray Bentos, Paysandú Gualeguaychú	Semi-Annual

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LINKS OF INTEREST

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Argentina

Statistics and Census Direction (DEC). Entre Ríos Government
www.entrerios.gov.ar/dec

National Institute of Statistics and Census (INDEC)
www.indec.mecon.ar/

Ministry of Health
www.msal.gov.ar/htm/default.asp

Statistics and Health Information Direction
www.deis.gov.ar/

Ministry of Social Development
www.desarrollosocial.gov.ar

Ministry Of Health and Social Action – Entre Ríos
www.entrerios.gov.ar/msas/

Ministry of Economy and Production – Agriculture, Cattle, Fishery and Food Secretariat (SAGPyA)
www.sagpya.mecon.gov.ar

Ministry of Health – Secretariat of Environment and Sustainable Development – National Direction of Natural Resources and Conservation of the Biodiversity
www.medioambiente.gov.ar/bosques/default.htm

Gualeguaychú Development Corporation
www.codegu.com.ar

www.gualeguaychuturismo.com

Uruguay

National Statistics Institute
www.ine.gub.uy

Ministry of Education and Culture
www.mec.gub.uy/educacion/estadistica.htm

General Forestry Direction MGAP
www.mgap.gub.uy/Forestal/DGF.htm

Ministry of Cattle, Agriculture and Fishery
www.mgap.gub.uy

Ministry of Public Health
www.msp.gub.uy

Ministry of Sport and Tourism
www.mintur.gub.uy

Commercial and Industrial Association of Río Negro
www.acirn.org

Society of Forestry Producers of Uruguay
www.spf.com.uy/

Uruguayan Agricultural Society
www.sociedadapicola.org.uy/

Argentina

Direction of Statistic and Census (DEC). Government of Entre Ríos
www.entrerios.gov.ar/dec

National Institute of Statistic and Census (INDEC)
www.indec.mecon.ar/

Ministry of Health
www.msal.gov.ar/htm/default.asp

Statistics and Health Information Direction
www.give.gov.ar/

Ministry of Social Development
www.desarrollosocial.gov.ar

Ministry of Health and Social Action – Entre Ríos
www.entrerios.gov.ar/msas/

Ministry of Economy and Production - Secretariat of Agriculture, Cattle ranch, Fish and Foods (SAGPyA)
www.sagpya.mecon.gov.ar

Ministry of Health - Environment Secretariat and Sustainable Development - NationalDirection of Natural Resources and Conservation of the Biodiversity - Direction of Forestry
www.medioambiente.gov.ar/bosques/default.htm

Corporation of Gualeguaychú Development
www.codegu.com.ar

www.gualeguaychuturismo.com

Uruguay

National Institute of Statistics
www.ine.gub.uy

Ministry of Education and Culture
www.mec.gub.uy/educacion/estadistica.htm

General Forestry Direction MGAP
www.mgap.gub.uy/Forestal/DGF.htm

Ministry of Cattle ranch, Agriculture and Fishery
www.mgap.gub.uy

Ministry of Public Health
www.msp.gub.uy

Ministry of Sport and Tourism
www.mintur.gub.uy

Commercial and Industrial Association of Rio Negro
www.acirn.org

Society of Forest Producers of Uruguay
www.spf.com.uy/

Uruguayan Apicultural Society
www.sociedadapicola.org.uy/

ANNEX I

Draft Social Impact Assessment, November 2005

INTERNATIONAL FINANCE CORPORATION (IFC)

DRAFT REPORT

Social Impacts Assessment

Cumulative Impact Study
For Two Pulp Mills and Wood Sources
In Uruguay

November, 2005
Submitted by

PCI Americas
In association with

MALCOLM PIRNIE

Montevideo Washington, D.C. Sao Paulo

Contents

STUDY OF THE CUMULATIVE SOCIAL IMPACT OF THE CONSTRUCTION AND OPERATION OF THE ORION (BOTNIA) AND M'BOPICUÁ (CMB) PULP MILLS

I .Social profile of the area of influence[1]

The area of influence of the projects cover a territory which includes three departments in Uruguay: Río Negro, Soriano and Paysandú; and one department in the Province of Entre Ríos in Argentina: Gualeguaychú.

In 2004 the total population of the area of influence in Uruguay was estimated to be 251,796 persons, broken down as follows: Paysandú, 113,244; Río Negro, 53,989; Soriano 84,563 and in 2001 the population of Gualeguaychú was 101,350.

Within the departments in the area of influence there is a heavy concentration of population in urban areas, with almost 9 out 10 persons residing in cities or towns. There is a concentration of population in the urban areas. The capital cities of Río Negro and Soriano (Fray Bentos and Mercedes) account for about half of the departmental population; three quarters of the departmental population of Paysandú and Gualeguaychú, live in the capital cities, which carry the same name as the departments.

Each department shows a similar breakdown of population by sex, with a slight predominance of men in Río Negro and of women in Paysandú, Soriano and Gualeguaychú. However there are significant differences in the relative numbers of men and women according to the urban/rural location of the population: in urban areas there is a similar proportion of men and women; in rural areas men predominate, for example, by as much as 1.6:1.0 in Paysandú. Population forecasts for the Uruguayan departments to 2025 by the National Institute of Statistics (INE) show very low rates of growth and an absolute and relative decline in the rural population, conforming to long term national trends of steadily increasing urbanization.

In terms of human development the area of influence is relatively homogenous, with the United Nations Index of Human Development (IHD) assuming relatively high values in comparison to the norm for Latin America, and being similar in each of the departments. For Uruguay, the latest disaggregated data, relating to 2002, showed an IHD of 0.833 for the entire country: 0.837 for Río Negro, 0.835 for Soriano and 0.831 for Paysandú. The latest available disaggregated data for Argentina, referring to 1999, shows an IHD of 0.826 for the entire country and 0.801 for the Province of Entre Ríos.

Another indicator of the quality of life is the rate of infantile mortality, which is 13.6 per thousand births in Paysandú, 15.3 in Gualeguaychú, 17.6 in Soriano and 19.6 in Río Negro. Life expectancy at birth is about 71.6 years in the area of influence in Argentina and about 74.5 years in the corresponding area in Uruguay.

NOTE: Each of the points included in this executive summary are covered in the text of the cumulative social impact study.

[1] The data contained in this report do not necessarily constitute a valid comparison between social conditions in Uruguay and in Argentina, as in some cases there are differences in definitions and in the level of aggregation reported by the different national sources and comparable data may not be available for the most recent years.

In the field of education within the area of influence, on the one hand, the level of illiteracy is relatively low, being only about 2.3%; on the other hand, the percentage of the population attending university does not reach 8 per cent, with a very low 1.7 per cent registered in Río Negro.

An occupational profile of the area reveals that 22.4% of the active workforce in Gualeguaychú are employed by the public sector, the corresponding figures in Uruguay are: 21.4% for Río Negro, 17.7% for Paysandú, and 17.6% for Soriano.

In terms of employment by sector, services are by far the most important, with 70% of the active workforce of the area of influence being employed in this sector. About 20% of the workforce is employed in the industrial sector and agriculture accounts for the remaining 10%.

There are large differences in unemployment between Río Negro and the other departments in the area of influence: Río Negro registers an unemployment rate of only about 3.6% of the workforce, whereas in Paysandú it is 16.3% of the workforce and in Soriano the unemployment rate reaches 16.9% with a slightly higher 17% reported for Gualeguaychú.

Within the area of influence of the pulp mills, the morbidity profile differs little among the departments. Levels of sexually transmitted diseases in the area are well below national averages. Highway accident rates in the departments and rates of criminality are also below those registered on a national level, on both the Argentine and Uruguayan sides of the Uruguay River.

In terms of industries related to natural resources it can be observed that within the area of influence there is a significant tourist industry. In Gualeguaychú tourism is concentrated on the annual summer Carnaval period with activities connected with the sun and beaches; on the Uruguayan side there is also sun and beach tourism and several areas where there are thermal springs. The area of influence in Uruguay is an important tourist destination for Argentines. In the tourist season (January through March) it is estimated that the tourist attractions in Gualeguaychú attract about 447,000 tourists and the tourist areas on the Uruguayan side attract about 81,000 visitors. Most of these tourists can be categorised in the medium socio-economic levels.

The agricultural land in the area of influence is predominately devoted to livestock grazing, but with important areas of man-made forests in the Uruguayan area of influence; agricultural crops dominate rural land-use in Gualeguaychú.

There are an estimated 1,415 beekeepers in the Uruguayan area of influence and 700 in the corresponding area in Argentina. The production of honey is generally complementary to other agricultural activities, with more than one half of the beekeepers working only part-time at this particular activity.

Fishing is essentially a small-scale activity; the active fishing population is estimated at 126 persons within the Uruguayan area of influence and 50 persons in the relevant area in Argentina. During the fishing season these numbers might be double. Most fish is sold in local markets and some sales are made to industrial buyers from outside the area.

II. Accumulative Social Impacts

For the study of accumulative social impacts a distinction was made between impacts during the phases of construction activity and of manufacturing pulp, the latter is hereafter referred to as the operational phase.[2]

II.1 The Construction Phase

- The direct social impact in the construction phase will be the influx of persons, primarily in Fray Bentos and its environs, attracted by the opportunities for employment that will be generated in the area. In view of the nature of the construction work, it can be expected that the increase in population during the two to three years of plant construction will be heavily weighted towards men and, in particular, younger men. An analysis of the regional social profile, especially of the economically active population, shows that a large number of new workers will be outsiders, certainly from outside of the Fray Bentos region; and a significant number will be from outside the area of influence.

- There will be an impact on the ability of the social services to cope with the new demand generated by this increase in population, particularly in the areas of housing, health, education, transport and recreation and cultural activities. The major pressure will be on the social services provided in the city of Fray Bentos. The specific impacts will depend on the relative numbers of local and outside residents that that will occupy the positions created during the two to three years of the construction stage.

- There will be a substantial increase in the demand for housing, with the present supply available being quickly occupied and with an overflow into Mercedes which is within daily commuting distance of the plants. The cost of rental properties will increase, mainly in Fray Bentos and neighbouring areas. It is likely that, in order to satisfy demand, irregular housing will appear within the city.

- There will be an increase in demand for health services at all levels, particularly in Fray Bentos and its vicinity. Private health care will be needed for the workers in the plants, and their families, and for those employed in related activities. An increase in public health provision will be required for those who cannot afford private health care; for example for families of workers with low levels of remuneration, itinerant workers and others, who might not be able to join the labor market and who have limited financial means.

- As for any major construction Project, it can be expected that there will be an increase in industrial accidents, in particular those involving multiple injuries, and in road accidents. There will also be an increase in sicknesses resulting from construction activities, all of which will require an extension of presently available health services and an increase in health service infrastructure. It is expected that the influx of male migratory workers will result in an increase in the incidence of sexually transmitted diseases.

- There will be a large increase in heavy vehicle traffic on main routes and on access roads to the plants. There will also be an increase in demand for mass urban and interurban transit in order to move workers between their place of residence and the plants; this will occur within the city of Fray Bentos and to and from neighbouring towns

[2] The analysis of social impacts assumes that Uruguayan environmental norms are fully observed.

and cities, resulting in an increase in traffic accidents for populations living along these routes.

- The construction of the plants will result in a significant reduction in unemployment in the Uruguayan area of influence, increase in the economically active population and result in a larger percentage of women, resident in the area of influence, entering the workforce. Lack of training of the workforce in the area of influence could result in outsiders securing those positions in the construction phase for which local workers are not qualified. However, there will be an increasing amount of opportunity for the local population to engage in self-employed activities and start up small business in the service sectors, both specialized and non-specialized, in the area of transportation, serving the plants and/ serving the needs of the local population.

- There will be an increase in the demand for public and private primary and secondary education; the former mostly for the children of construction workers and the itinerant population; the latter for children of technical and management personnel. The amount of educational support required will depend on the characteristics of the incoming population, whether they are with or without families and whether or not they reside in the area.

- There will be changes in the quality of life for the population in the area of influence, and most notably in Fray Bentos and in the surrounding area. The pace of life will increase with the influx of outsiders into the area, there will be an increase in traffic, with its attendant increase in noise and an increase in tourist and commercial activities. There will be greater demand for and supply of cultural and recreation events and activities. With the increasing population, it can be expected that there will be a rise in incidents of anti-social behaviour and in crime.

- Within the area of influence of the projects, social groups who depend on natural resources for their living will experience a possible increase in tourist activities, related to the activities of the plants (ENCE has already established an important zoological garden adjacent to its site, where endangered native fauna are exhibited encouraging a large number of visitors, especially school children). Possible demonstrations in the summer months by residents of Gualeguaychú opposing the establishment of the plants could result in a reduced number of Argentines frequenting tourist locations within the area of influence in Uruguay. There should be no significant social impact resulting from the construction phase of the plants on the artisan fishing industry and the beekeepers of the area of influence.

- During the construction phase the social impacts on the area of influence in Argentina will not be affected by the increase in the population as the influx will be restricted to Fray Bentos and its surroundings. Supply of workers from Argentina to Fray Bentos is unlikely to occur as there are legal impediments to the cross-border movement of labor. The start up of the construction works on the pulp plant sites generated feelings of vulnerability and anxiety, with fears of adverse environmental consequences for the inhabitants and area of Gualeguaychú. The related closure of the international bridge between Argentina and Uruguay at Fray Bentos by demonstrators on the Argentine side of the bridge could affect the willingness of business interests to make new investments in the Uruguayan area of influence and provoke a slow down in investments related to the tourist industry.

2.1.2 Mitigation measures in the construction stage

The following is a summary of the principal measures, being implemented or planned, designed to mitigate adverse social impacts resulting from the construction phase. This information was obtained through interviews and documentation from various sources.

i) Being implemented or planned

- Housing: Botnia, in coordination with the Land Management Unit of the Municipality of Río Negro, is constructing low cost housing to accommodate its workers that arrive in the area without families and is providing suitable housing for its higher level employees. ENCE, has acquired land for the construction of housing for its technical and administrative staff. The Land Management Unit of the Municipality of Río Negro is coordinating with the National Directory of Land Use (DINOT), to plan for the expansion of urban areas, taking advantage of those areas, primarily in Fray Bentos, already having basic services and infrastructure.

- Health: Both Botnia and ENCE include health specialists on their staff and have management plans to handle health risks and to prevent industrial accidents. Botnia has an agreement with the Ministry of Public Health (MSP) for 24 hour coverage inside its plants. ENCE has a system to attend emergencies within its construction site. The MSP is working out a strategy to attend to the increased demand for health care, including additional emergency facilities at the Fray Bentos Hospital, together with equipment to permit rapid diagnosis of serious multiple injuries and arrangements with neighbouring departments for rapid movement of patients. The MSP is putting into effect an epidemic awareness and education system to prevent and monitor any possible adverse health effects during the construction and operation phases of the plants. Private health cooperatives in the various regional centers are planning a system of mutual cooperation.

- Transit and Transportation: To minimize the adverse effects of increased vehicular movement associated with the construction of the plants, both companies have constructed dedicated access roads to their sites, with a direct connection to national highways. They are also planning specific routing of heavy goods vehicles to ensure that they do not pass through towns, close to schools and population centers, thereby minimizing risks of road accidents and avoiding changes to the quality of life of the population in the area of influence. The Transport Directory of the Municipality of Río Negro is planning to construct a by-pass to ensure that heavy vehicular traffic does not have to enter the city of Fray Bentos. An agreement is to be signed between the Municipality and the Ministry of the Interior to improve road safety and controls on national routes in Río Negro.

- Education and Training: Agreements have been signed between the companies, the Ministry of Labor and Social Security and the National Employment Board for the setting up of training courses to train workers in skills that are not yet well developed in Uruguay, for example steel welding. Agreements have also been signed with private educational institutions to provide schooling for the children of plant workers.

- Quality of Life: The Municipality of Río Negro is working on a plan to satisfy the demand for increased recreational and cultural activities, taking advantage of local facilities and professionals in the fields of music, theater and motion pictures. There is also a plan to reinforce the local police and for the elaboration of a plan to improve the security of the citizenry through the prevention of increases in the crime rate, and acts against property and persons. The companies are implanting strategies for communicating with the public through workshops and talks, enabling the residents of the area to ask questions or articulate their worries with regard to noise or other subjects related to the construction of the plants.

- Tourism: to provide support to this important sector the Directory of Tourism of the Municipality of Río Negro is looking at ways to expand the availability of tourist sites in the area, for example by promoting a 'forest route' that includes a visit to the Orion (Botnia) plant.

- In the area of influence in Argentina there are no plans for mitigation measures, either by individuals or by institutions. The local government, the NGOs and residents in the area are opposed to the construction of the plants and for this reason they have not proposed a scenario which would include ways of mitigating possible adverse effects during the construction phase.

ii) Recommendations

- Health: The Ministry of Labor together with the Ministry of Public Health should take steps to maximize public safety and control by implementing a system for monitoring sicknesses that might be provoked by the construction works: particularly stress, respiratory and hearing problems. The MSP should also increase its health control on sex workers to mitigate the increase of sexually transmitted diseases.

- Transit and transportation: There is a need to bring together Botnias and ENCE, the private transport sector and the municipalities to develop a system of regional public transport, at reasonable cost to the user, to permit the movement of workers between towns and cities in the area and the construction sites, without overburdening the transport services of the city of Fray Bentos. Implementation of such a system would also aid in the decentralization of regional development. Agreements should be reached between the companies and primary educational institutions to organize programs designed to further educate students in highway safety, particularly at schools located on roads with heavy goods traffic movement.

- Conditions and characteristics of employment: The Ministry of Labour should intensify its inspections to assure that labour norms are followed with respect to working and safety conditions. There should be permanent coordination between Botnia and ENCE to manage the influx of workers into the area, the training of manpower and for the contracting of workers for the greatest possible amount of time.

- Education and Training: There should be agreement between the National Employment Board and the UTU requiring coordination with Botnia and ENCE in order to identify areas of specialization for which workers are likely to be in future demand and set up appropriate training programs. There is a need to expand the public school system at the pre-school, primary and secondary levels that would, among other things, permit an increase in employment of young mothers with children of pre-school age.

- Quality of life: Local governments should promote cultural, recreational and sports activities that would increase regional integration, most importantly in the city of Fray Bentos, to mitigate possible negative affects arising from perceived social inequalities between local residents and new comers.

- The central governments should empower the Joint Commission, created by the Ministries of Foreign Affaire of Argentina and Uruguay, to establish stronger ties with local and regional representatives and residents to generate a more consistent flow of information and reinforce the local cooperation and coordination of bilateral organizations such as the Administrative Commission for the Uruguay River (CARU).

2.2.1 The Operations Stage

Any adverse impacts during the operations phase would result from the operation of the plants and/or the final stages of construction.

- Housing: In comparison to the construction phase there would be a reduction in overall housing demand and a corresponding reduction in the cost of renting. However, for more expensive properties there could be an increase in demand owing to demand by high level operational administrators, technicians and skilled labor involved in operation of the plants and of new enterprises supplying the pulp plants.

- Public health: The decrease in the number of workers engaged by the plants should result in a reduction of industrial accidents and a change in the nature of accidents.

- Transit and transportation: There will be a higher probability of road accidents as truck traffic related to the operations of the plants will require about 400 trucks per day to supply the plants at full production with raw materials.

- Conditions and characteristics of employment: There will be a change in the occupational patterns in the region with a reduction in construction workers and increases in forestry, transport and services. Increased demand for transport workers will extend to: drivers, mechanics, warehouse workers, those engaged in the supply of fuel and, indirectly, for workers in related service industries: lodging, restaurants, bars, insurance, vehicle sales etc.

- Education: Demand for private education in the area of influence will not fall with the reduction in employment, but rather is more likely to rise with the influx of more highly educated personnel involved in the operational phase of the plants. This demand will cover pre-school, primary and secondary levels.

- Quality of life: There will be a tendency for greater social stratification in the city of Fray Bentos with the influx of operational personnel for the plants in the higher social and educational categories.

- Social groups that depend on natural resources for their living: The tourist industry will suffer from the decrease in the number of people circulating in the area of influence. The possibility of offensive smells originating from the plants for several days per year, changes in the pristine nature of the countryside as a consequence of the presence of the plants and the increase in heavy goods traffic could deter tourism in the area of influence. Fishing and beekeeping should not be affected significantly by impacts associated with the operation of the plants if the plants, as expected, conform to existing environmental norms.

- Raw material inputs: There will be an increase in the amount of forestry area. But this increase will not substantially change the land use profile in the Uruguayan area of influence, as this will remain predominantly dedicated to cattle grazing. There will be an increase in forestry employment. The commercial forestry products industry will increase in size in the Uruguayan area of influence. There could be an increase in the area dedicated to forest plantations in Argentina.

- Commercial opportunities: There is potential for commercial opportunities for businesses in Gualeguaychú to supply inputs to the pulp plants, which would create jobs in the Argentine area of influence.

- Social impacts of an industrial accident: In the event of an industrial accident that would cause significant pollution of the air or water there would be serious social consequences. Such an accident could provoke respiratory disease, allergies, disease of the nervous system, among other things. There could also be a substantial adverse effect on tourism, with tourists avoiding the effected area. Beekeepers could see a reduction in the production of honey and/or a reduced chance of overseas sales and fish stocks in the Uruguay River could be reduced. There would be a subsequent reduction of income to those relying on natural resources for a living.

II.2.2 Mitigation measures during the operations stage

i) Being implemented or planned

- The mitigation measures for the operational phase include sustaining and adapting those measures proposed for the construction phase so that they address the necessities of plant operations, addressing issues of health, preventing industrial accidents and sustaining the safe and effective movement of people and freight by road.

- At present the concerned parties are concentrating of measures to mitigate the possible negative impacts due to the construction activities at the plants and have not to date concentrated exclusively on specific measures to mitigate adverse impacts in the operational phase.

- The Municipality together with 12 major businesses in the Fray Bentos area, including Botnia and ENCE, has constituted a 'development agency' with the objective of creating strategic projects to address the above mentioned and other issues.

ii) Recommendations

- Setting up of a 'watchdog´ organisation to monitor and analyse the evolution of possible social effects resulting from the plants' operations. This body would include representative of the plants themselves, local and national government, members of civil society, workers and NGOs.

- Reinforce measures to improve road safety and vehicular and driver control and should include specific courses designed for truck drivers involved in the transport of wood products.

- Training for small and medium business enterprises that might Benedit from the operations of the plants.

- Take action to increase the supply of tourist attractions in the area of influence, incorporating new destinations oriented to rural tourism, industrial tourism, the forest route, traditional sun and beach tourism, thermal spas and the Carnaval at Gualeguaychú. Set up a tourist circuit of the two pulp plants and include the zoological garden at M´Bopicuá.

- Constitute a bi-national control body comprising of stakeholders in the preservation of the social and ecological environment, including members of civil society in the area of influence. This body would coordinate and disseminate information on: levels of contamination in the Uruguay River and atmospheric contamination in the area of influence, monitor the health of bees and fish stock in the area and maintain a watch for possible signs of illness resulting from the operations of the plants.

- Coordinate the health services in the area of influence of the Project to ensure that should a serious accident happen that there would be a rapid and effective response, so that the amount of damage would be contained.

STUDY OF CUMULATIVE SOCIAL IMPACTS OF THE CONSTRUCTION AND OPERATIONS OF THE ORION AND M´BOPICUÁ PULP MILLS

GENERAL

Introduction

This study is an addendum to Cumulative Impact Study of THE M'Bopicuá (ENCE) and Orion (Botnia) pulp mills made by the consulting companies PCI Americas and Malcolm Pirnie, Inc.. It responds to the requirements of the Policy of Evaluation of Environmental Impact of IFC (OP 4.01).

The Cumulative Impact Study is defined as the analysis of all the effects (environmental, social and economic) caused by the activities of construction and operation of the two projected pulp plants in the department of Rio Negro. The cumulative effects may show synergies, be of greater or lesser magnitude or relevance, be transient of more permanence in time and/or with a greater or lesser area than the individual effects of one activity. (For guidelines, see the Integration of Environmental Issues into Engineering Practice.)
.
This study is centered exclusively in the analysis of the potential social impacts of the mentioned projects and in accordance with the terms of reference of the consulting contract. The analysis is made from the point of view of the social consequences of possible adverse environmental impacts within the environmental regulations in force in the country.

Specific objectives

One of the specific objectives of the present study is to provide a base-line socioeconomic and demographic profile of the situation of the population resident in the areas of influence of the plants previous to their construction. This will allow the monitoring of the evolution of the different indicators through the time, and allow comparison of situation pre and post-implementation of the projects.

A second objective is to determine the possible social impacts that the execution of both projects will produce in the zone of defined influence. The analysis of these impacts will include: health, education, housing, quality of life and public security.

A third objective of this study is to identify measures to mitigate possible negative impacts of the construction and operation of the plants. In this sense it pays special attention to the identification of the measures of mitigation that have already been started or are planned by the companies, members of civil society and national or local governments.

Determination of the area of influence of the cumulative effects of both plants

The Cumulative Social Impact Study (CSIS) was developed taking into account the geographical location of the plants and considering the location of sources of raw materials.

To define the geographical extent of the social effects information was obtained from three sources: by interviews and consultations with local authorities and members of the community: from studies already carried out, and through interviews with personnel of the future plants. The extent of the geographical area of influence is based on the social and historic realities of the area, urban transport networks and movements of people on both sides of the international bridge at Fray Bentos, which connects Argentina and Uruguay. Based on these criteria it was determined that the area of influence includes the departments of Rio Negro, Soriano and Paysandú in Uruguay and the Department of Gualeguychú in the Province of Entre Ríos, Argentina. The greater area on the Uruguayan side of the Uruguay River is due to the fact that the areas of wood supply for the plants are included in the area of influence. A further consideration in the definition of the area of influence relates to the need to include areas that are defined as discrete administrative units, resulting in the area of influence exceeding a 50 kilometers radius in some directions. Each administrative unit has its own system of local government for which social data is collected and reported as part of the national social statistical database. This facilitates the collection of consistent and continuous data for the base line and subsequent monitoring.

CHAPTER I. SOCIAL BASE LINE DATA AND SOCIAL PROFILE

A Base line and social profile was constructed using the most up-to-date secondary data available in Uruguay and Argentina. In order to put some of this data in context, and to complement insufficient or missing information, interviews were carried out with informed parties. Details of the selected indicators, the sources of data and of the interviews are contained in the Annex to this report.

The social data base covers the following areas:

I. Demographics, education and employment
II Birth and death rates and health
III. Housing and Utilities
IV. Quality of Life
V. Subsistence activities related to natural resources, for example fishing, beekeeping and tourism.

It should be emphasized that although the base line information reflects similar definitions, some of the indicators, administrative units for which the data is reported and criteria for organizing the data may differ between the two countries. To the extent possible the information from the different sources has been standardized.

1.1 URUGUAY: THE DEPARTMENTS OF PAYSANDÚ, RIO NEGRO, AND SORIANO

1.1.1 Information on the Uruguayan area of influence of the plants

The Base line for Uruguay was constructed with secondary statistical information taken from official sources, mainly the National Institute of Statistics (INE).

For some of this use was made of data resulting from Phase 1 of the 2004 Census, which provides information on the size of the population by location, sex and age.

In order to cover the rest with the demographic and socioeconomic indicators, not available in the Census resort was had to the latest data of the Permanent Household Data Survey (ECH). The ECH gives monthly information about the resident population in localities with greater than 5,000 inhabitants, with the Department being the lowest level of aggregation reported. The latest data covers the calendar year 2004.

From this survey information was processed for departments that are within the defined area of influence of projects in Uruguay: Soriano, Rio Negro and Paysandú.

Where it became necessary to count on information for localities within each department – recourse was had to the previous complete national Census, which provided the information at this level of aggregation.

With regards to specific sectors (mainly health, education and farming activity), information was obtained from the relevant ministries and administrations (Ministry of Public Health, Ministry of Education and Culture, National Administration of Education Public, Ministry of Agriculture, Cattle and Fishing) and also from specific sector studies, particularly for tourism and forestry.

The definitions used correspond to those employed by the International Labor Office (ILO) of the United Nations.

1.1.2 Socio-Demographic Characteristics

Tables 1 to 12 of Annex III

Population, surface and density, rate of exponential growth. 2004

Department	Population	Density hab/km^2	Rate of exponential growth
Paysandú	113.244	8,1	0,466
Rio Negro	53.989	5,7	0,509
Soriano	84.563	9,3	0,602

SOURCE: INE, 2004

INE, Uruguay in Numbers 2005

Combined, the three departments of the area contain a population of 251,796 people. The population growth in the period 1996-2004 of the three departments has different growth rates: the smallest increase is in Paysandú (1,7%), and the greatest one in Rio Negro (4,8%).

Soriano is the department with the greatest population density, there are 9.3 inhabitants per square kilometer; in Rio Negro, there are 5,7. The smaller population density in Department of Rio Negro can be explained by the greater percentage of rural population.

Index of masculinity, percentage of urban population and percentage of population according to age section. 2004.

Department	Index of masculinity	% urban population	% population 0 to 14 years	% population 15 to 29 years	% population 30 to 59	% population 60 years and more
Paysandú	99	92,37	27,61	22,44	33,52	16,44
Río Negro	105	87,49	28,04	22,57	34,33	15,06
Soriano	98	90,22	25,95	22,83	33,72	17,48

FUENTE: INE, 2004

A similar distribution by sex in each department is observed, with the slight majority of the men in Rio Negro and women in Paysandú and Soriano. The rate of men to women differs according to the areas. In urban ones, there is a percentage split of equal population for both sexes. In the rural areas, there is a clear increase of the ratio of men to women per 100 as a base (163 in Paysandú, 159 in Río Negro and 127 in Soriano).

In the three departments in the zone of influence of the projects, there is a concentration of population in the cities, approximately 9 out of 10 people reside in the larger cities of Paysandú, Río Negro, and Soriano. The departmental capitals concentrate more than half of the inhabitants of the departments (55% of the population).

The population of these departments shares the national characteristic of being one relatively an aged population, with a high participation of the older sectors in the mix of the population. Approximately half of the population of each department is 30 years or older. In the younger ages, there is a greater percentage of men than women, in the upper end of the distribution by age, this relation is reversed. In Paysandú 59% of the people are 75 years or older, and most are women; in Rio Negro 57% and Soriano 60%. The greater life expectancy for women at birth determines that three-fourths (74%) of the individuals 95 years or older, and residents in these departments, are women.

The stated characteristics reflect in the size of the homes, which present an average of 3.3 of people per home, a demographic profile way under natural growth rates. The **low birth rate** (18.55 in Paysandú, 17.91 in Río Negro and 17.65 in Soriano) **and mortality** (8.59 in Paysandú, 7.95 in Río Negro and 9.62 in Soriano) confirm the characteristics of the populations of the region within the characteristic of a low population density.

Population projected by department (to the 30 of June of every year)

Year	Population		
	Paysandú	Rio Negro	Soriano
2010	116.387	56.513	88.449
2015	117.777	58.001	90.931
2020	118.960	59.426	93.333
2025	119.707	60.664	95.533

Source: National Institute of Statistic

The population growth projected[2] for the year 2020 will be 5% for Paysandú and a little over 10% for Rio Negro and Soriano. In the next five-year periods in the three departments, an increase of the masculinity rate will take place in Paysandú and Soriano. A clear decrease of the absolute and relative number of inhabitants residing in the rural areas is forecast, following the clear national and global tendency of urbanization of the population (at the end of the selected period the urban population will be 94.3% in Paysandú, 90.1% in Río Negro and 93.8% in Soriano).

1.1.3 Social Development

Tables 13 to 16 of Annex III

IDH[2] by department. 2002

Paysandú	Rio Negro	Soriano
0,831	0,837	0,835

Source: The PNUD, Human Development in Uruguay 2005

The Index of Human Development provides a good indication of the level of social development. As is observed in the IDH table, it shows relatively high values and very similar ones for the three departments. These are similar to the total for the country (0,833), and slightly under the figure for Montevideo (0,880). In the national ranking, Rio Negro occupies seventh place, Soriano tenth, and Paysandú eleventh.

It is noted that the IDH has registered a slight, but sustained increase in the last decade for the three departments in the area of influence of the projects, following the national pattern for this indicator.

In comparative terms, in the year 2001, these numbers surpass the average of Latin America (0,749) and resemble those registered by countries of high human development (0,879).

Rate of infantile mortality and life expectancy at birth

Department	Rate of infantile mortality 2003	Life expectancy at birth 2005
Paysandú	13,6 0/00	75,38
Rio Negro	19,6 0/00	71,78
Soriano	17,6 0/00	79,09

Source: INE on the basis of Ministry of Public Health 2003
INE, Uruguay in numbers 2005

As part of the quality of life of the population analysis, the data on rate of infantile mortality and life expectancy at birth are recorded. The table shows that in the three departments there is a low infant mortality and a high life expectancy at birth. Nevertheless, the rates of infant mortality of Río Negro and Soriano are higher than the national (13.5 0/00). As mentioned, women have a life expectancy at birth greater than that of men, exceeding it by approximately 7 years.

1.1.3.1 Home Income

Tables 17 to 18 of Annex III

Gini Index of the income per capita concentration with locative value by department (urban country). 2002

Department	Gini Index
Paysandú	0,4148
Río Negro	0,3837
Soriano	0,4301

Source: The PNUD, Human Development in Uruguay 2005

The Gini indexes[3] show an **income concentration** lower in the Rio Negro department and in general, **lower than the total of the urban country** (0,457) and **relatively low for the Latin American arrangement**. However, compared with the developed countries these figures are indicate an unequal income distribution.

The homes average monthly income (in Uruguayan pesos) is smaller in Río Negro than in other departments ($ 11.178 in Paysandú, $9.280 in Rio Negro and $ 12.666 in Soriano). These averages are lower than the ones of the total of the country and to the ones of the capital.

comparison of the average of income of the superior limit of 20% more poor man and of the inferior limit of richer 20%, it confirms the smaller relative inequality in terms of income in the department of Rio Negro.

1.1.3.1 Poverty Incidence in the Homes

Tables 19 to 21 of Annex III

Index of Human Poverty[4] per department. 2002

Paysandú	Rio Negro	Soriano
24,1	16,6	23,7

The IHP shows a higher figure in Paysandú, followed by Soriano. The smaller incidence of human poverty is registered in the department of Rio Negro.

Percentage of homes and people with NBI. 2002

	Percentage of poor population	Percentage of poor homes
Paysandú	32	22
Rio Negro	17	10
Soriano	27	17

Source: Veiga and Rivoir 2004

Consistent with the IHP, it is seen that Paysandú has the greatest percentage of homes and population with relative deprivation. The numbers for this department duplicate those of Río Negro.

An indicator associated with the incidence of poverty for homes in the area is the existence and population weight for irregular settlements. The percentage of resident population in irregular settlements is practically none in the three departments. Soriano presents the largest figure (0,08%) duplicating that of Paysandú (0,04%) and is four times greater than for Rio Negro (0,02). The population in irregular settlements is concentrated in the urban locations. There are only 2 locations in Rio Negro that register people in irregular settlements, 3 in Paysandú, and 1 in Soriano. In the two last departments, only the capital city registers irregular settlements.

5 IPH Departmental: Probability of not living up to 60 yeas, incidence of poverty with LP (relative, 1996, 2001) % of adults older than 15 years old that did not attend the educational system, unemployment rate (long term, open).

1.1.4 EDUCATION

Tables 22 to 29 of Annex III

Precise estimation of the percentage of population of 14 or more years of age by maximum level of instruction reached according to departments. Year 2004

	Without Instruction	Primary Incomplete	Primary complete	Secondary 1er Cycle	Secondary 2do Cycle	Technical	Teaching or Teaching staff	University or similar
Paysandú	0,9	13,6	22,2	18,2	21,1	12,4	3,7	8,0
Río Negro	1,5	10,0	27,0	34,3	15,8	4,8	4,8	1,7
Soriano	2,3	15,2	17,8	17,8	24,0	12,5	4,3	6,1

The educational profile of the population in the area of influence of the project does not differ substantially from the characteristics of the rest of country. The percentage of people without instruction is low, mainly in the department of Rio Negro. The majority of persons 14 years old or older, have primary studies (both complete or incomplete).

Basic education levels are well covered in all three departments; in technical and higher level education Río Negro is significantly behind Paysandú and Soriano.

The average density of primary schools in the three departments of the regions (158 students per school in Paysandú, 122 in Rio Negro, 110 in Soriano) is low due to the number of schools in the smaller urban centers and the countryside, which have a very low registration. Nevertheless, if only the schools of the larger urban centers are considered, such as Fray Bentos, Mercedes, or Paysandú, the available school services are saturated and with resource deficits in the more needy districts.

For the amount of students per class, in the first through fourth year of secondary public education, the three departments show figures that suggest overpopulation of the classrooms, surpassing 30 students per class. This relation is larger in the 5th and 6th year of secondary school, except in the department of Paysandú where there are 9.4 students per class.

The Education offered in the departments is basically public schools. In the city of Fray Bentos, considered to be like the zone closest to the are of influence of the projects, and where the affluence of people will be concentrated, the public sector has 24 public schools (17 urban and 7 rural), 2 grammar schools, 2 schools of professional technical education (a Technical School and one Agrarian school) and an institute to train teachers. Most of the urban schools, the lyceums and the Agrarian School, have full capacities. The private sector consists of a primary school and a college with primary and secondary education up to the fourth year. Its capacity is underutilized, and is able to double the number of students.

1.1.5. EMPLOYMENT

Tables 30 to 40 of Annex III

The Area of Influence has an economically active population (PEA) of 55.7%. This percentage is 59.4% for Paysandú, 43.7% for Río Negro, and 59% for Soriano. The PEA is composed primarily of employed persons (96.6% in Rio Negro, 83.1% in Soriano, and 83.8%). The percentage of employed is lower between the ages of 14 to 19 years.

Rates of unemployment, activity and employment by department. 2004

Department	Rate unemployment	Rate activity	Rate work
Paysandú	16,2	59,4	49,8
Río Black	3,5	43,7	42,1
Soriano	16,9	59	49

Note: Urban country
Source: INE, 2004

The rate of unemployment of Rio Negro is the lowest in the area of influence, being very near to a minimum unemployment level. The departments of Soriano and Paysandú, on the other hand, have an important percentage of unemployed, over the national average (16.9% in Soriano and 16.2% in Paysandú).

In Paysandú and Soriano, free time affects the feminine population much greater (approximately 6% in men and 10% in women).

The free time situation is greater in the population less than 30 years old. In Paysandú and Soriano, the rate of unemployment of those who are less than 20 years old reaches figures higher than 40%. The assets of Río Negro are in a better situation than those of the other departments, as its unemployment rates are considerably lower in all age groups.

The rate of activity is greater in Paysandú (59,4%) and Soriano (59%) in all age groups, showing similar figures. Río Negro has a lower general activity rate (43,7%) and it increases among individuals between 14 and 19 years of age. The rate of activity is differential according to sex; it is higher in men than in women, mainly in Rio Negro where the rate of activity of men doubles that of women.

The rate of work shows similar numbers in the three departments, surpassing 40% in all. The specific rate of work is low between people of 14 to 19 years and those of 60 years and more.

The category of the most frequent occupation is that of an employee (72.1% in Paysandú, 57,3% in Río Negro, and 65% in Soriano), mostly for private-sector companies. The next important percentage is that of independent workers (on their own) with their own premises or not (23.3% in Paysandú, 38.8% in Rio Negro and 28.1% in Soriano).

With regards to the activity sectors, in all three departments the services sector is larger, in which approximately 7 out of 10 persons are employed.

1.1.6. HEALTH[1]

Tables 41 to 45 of Annex III

With regards to the incidence of HIV Positive, the rates per each 100.000 inhabitants are 47.5 in Paysandú, 71.6 in Rio Negro and 65 in Soriano. With respect to AIDS incidence the numbers are 16,1; 34,8 and 27 per each 100.00 inhabitants, respectively. The rates of HIV and AIDS are considerably below the national rates (193.1 and 84,9).

For routes of infection, sexual transmission predominates (67.7%), followed by blood transfusions (19.3%). Finally, perinatal infection is responsible for 1.7% of the cases. The Ministry of Health reports that it needs to reduce 11.3% of the cases, but the epidemiology investigation has not been completed.

With respect to sex, 66.7% of the affected persons are men and 33.3% are women. The more affected group is young people aged 15-34 years. Approximately 68.1% of the persons affected with HIV are less than 35 years old.

The last HIV studies showed a decrease in the rate of growth of infection among the economically active population of the country during the last three years.

Deaths by suicide are lower in Paysandú (13 completed suicides per 100.000 inhabitants) than in Río Negro (28), and Soriano (23). Other causes of violent death, such as fatal traffic accidents, and fatal work accidents show a smaller rates.

Traffic accidents occurred are mainly light (891 per 100.000 inhabitants in Paysandú, 518 in Río Negro, and 378 in Soriano).

The predominance of light accidents is also verified in relation to labor accidents, except in the department of Soriano where there occurs a majority of serious accidents. In Río Negro and Soriano the rate of fatal labor accidents per 100.000 inhabitants is zero.

Following are shown the infrastructure data corresponding to the city of Fray Bentos, organized according to private and public health subsystem.

Offer of health services in Fray Bentos

1. PRIVATE HEALTH		
SANATORIUMS		
Amount	1	Has no CTI complex. Yes it has a Unit of Special Cares, with two beds
Services associated	2	Policlinic for consultations and policlinic of mobil emergency
Affiliated (to June 2005)	6500	
Maximum Capacity	8000	
Amount of doctors	54	
Beds available	26	
Specialties	All except for neurosurgery	
PRIVATE POLICLINICS		
Amount	1	Primary health attention, without hospitalization.
Affiliated	1200	
Doctors	26	
Specialties	18	
2. PUBLIC HEALTH		
HOSPITALS		
Amount	1	Hospital of Fray Bentos. No it has no CTI
Services associated	1	Health Center of the MPH Attention to pregnant and children up to 5 years
Emergency mobiles	3	2 in use, 1 being repaired
Affiliated	18983	
Maximum Capacity	25000	
Amount of doctors	56	
Beds available	70	
Specialties	All except for neurosurgery and cardiovascular surgery	
Percentage of occupation in the year 2004	53	
POLICLINICS		
Quantity	3	In agreement with the IMRN it is planned to install one more (in Barrio Union)
Services that it offers	General Medicine, infirmary, psychological attention	

Source: Line Social Base of the Botnia company

1.1.7 PUBLIC SECURITY.

Table 46 of Annex III

Rates of crimes by department. 2003

Department	Against property		Against people		
	Thefts	Plunderings	Injuries	Homicides	Sexual
Paysandú	20	6	23	3	11
Río Negro	31	1	45	4	22
Soriano	26	0	46	6	24

Source: Department of the Interior. Statistical yearbook on Violence and Criminality 2003. Note: Thefts each 1.000 inhabitants. Plunderings and injuries each 10.000 inhabitants. Homicides and sexual crimes each 100.000 inhabitants

Crimes against property are more frequent than thefts. The greater rate for this type of crime is in the department of Rio Negro. The incidents of thefts are greater in the department of Paysandú.

The related statistic of **crimes against people** in these different categories, are lower in the department of Paysandú, and twice as many in the department of Soriano.

1.1.8. FARMING ACTIVITY

Tables 47 to 51 of Annex III

With reference to the farm production in the departments of the area of influence, there is a clear predominance of operations, around 50%, where the main income is related to bovine meat production, and secondly bovine milk production.

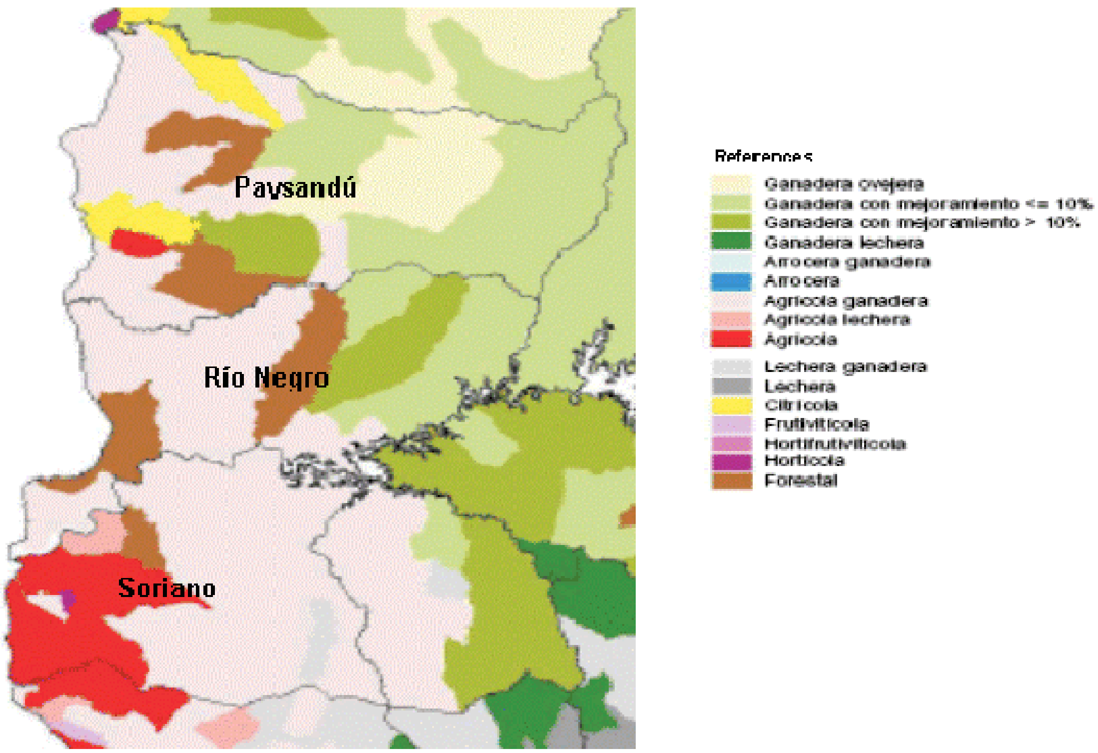
Paysandú has a greater number of farms related to vegetal production, fruit and grapes, horticulture, and sheep. This department also has a greater number of activities that do not generate income, but the products are for self-consumption.

With reference to land use, it stands out that the amount devoted to cattle raising, natural field, natural fertilized field, artificial prairies, annual forage crops, strubble fields, and natural forests constitute most of the utilized land in each department, exceeding three-fourths of the land is devoted to farming.

The ground committed to forestry (artificial forests) is 6.8% in Paysandú, 7,4% in Río Negro, and 2.5% in Soriano.

These land use commitments are verified in the map that follows, in which different farming regions are indicated for each department, showing the distribution of the amounts of land allocated to the different types of production.

Farming regions per department, year 2000



SOURCE: MGAP

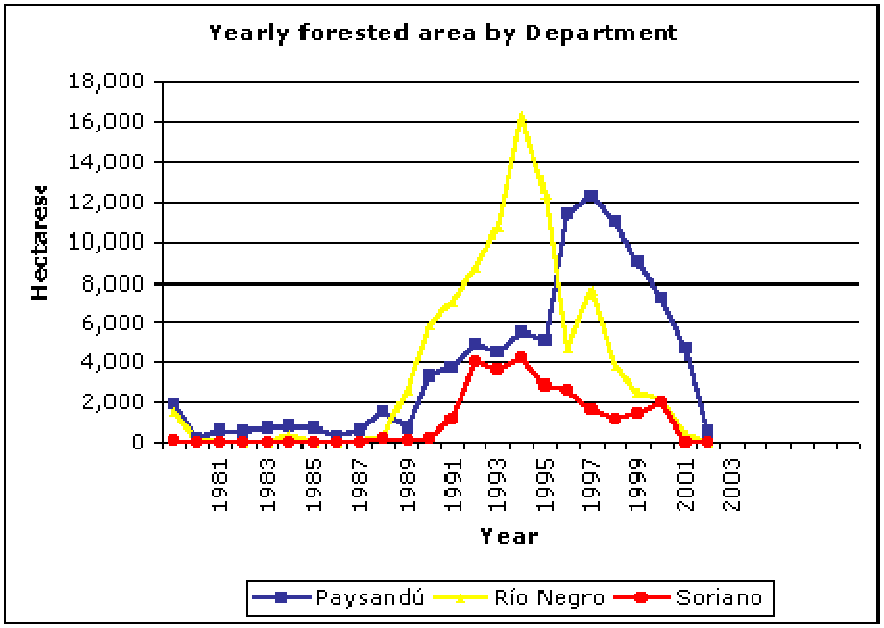
For patterns of land ownership, it shows a high number of smaller farms less than 100 hectares, being about half of these in the three departments. A high concentration of land ownership is noted. In Paysandú, eight companies are operating 5 times more land area than the 27.017 ha. exploited. In Rio Negro, there are four companies that have an area similar to one of 956 smaller farms and, in Soriano, two companies have more area than 1,143 other small farms.

Forestry Production

In the last two decades (mainly after the Law Nº 15.939 of December 28, 1987, and decree 372/99 Regulation of Forestry Companies), a large increase in forestry production occurred in the departments related to the projects, as well as in the rest of Uruguay.

At the end of the period reviewed, the three departments have more than one-third of the hectares grown in the whole country. Soriano has a minor area devoted to this activity and, as previously mentioned, shows the smallest percentage of land committed to forestry.

As shown on the graph below, the rate of growth of forest production slowed down in the last five-year period, reaching a peak during the years 1996 to 1998.



The number of jobs generated annually by forestry has increased with the years (4.049 in the period 1989-1990, and 10,011 in 2003). For the year 2010, the generation of 19.019 jobs in the sector is projected. (Society of Forest Producers).

The phase that produces the largest number of jobs has been at the beginning of the development and leads to the industrial production of wood products. In the year 1995, the phase of plant nursery, plantation, and harvesting contributed almost 7 of the 10 jobs operated. The transportation and logistics continue to have importance in contributing to additional jobs and lately have been increasing significantly.

1.1.9 DESCRIPTION OF SPECIFIC GROUPS RELATED WITH THE USE OF THE NATURAL RESOURCES AS A SOURCE OF SUBSISTENCE

Tables 52 to 57 of Annex III

TOURISM

Tourism is one of the main activities of the study zone for the projects. The tourist attraction is mainly “sun and beach,” mainly the referenced Las Cañas beach area in Rio Negro, and the thermal Spas of the Guaviyú in Paysandú. Secondly, there are water sports and cultural tourism.

The numbers that the Ministry of Tourism and Sport record on the volume of tourists to the "thermal coastal" zone estimates 81.376 tourists visited this region of the country annually. The main destination during the season of January of 2004 was Fray Bentos – Las Cañas, receiving 36.3% of the total tourists, more than the remaining tourist destinations. During the rest of the year, the main attraction for the visitors to the area is in the thermal zones of Paysandú and cultural.

For Rio Negro department, the main source of visitors is Argentinean tourists (80%, according to the Tourism Department of the IMRN), arriving from the Greater Buenos Aires area and 90% go to Las Cañas Beach area on the Uruguay River. The Tourism Department of the IMRN estimates that about 20.000 people use the beach area each week end during the high season (January and February). This destination is used mainly during the summer, and for other occasions such as Tourism Week, and during long weekends in Argentina.

According to a study performed in 2004 on the tourist sector in Fray Bentos (of the Campos, 2004) one-fourth of the PEA has a job relationship with tourist activities of Fray Bentos and Las Canas.

BEEKEEPING

The number of beekeepers in the 3 departments increased to 1,415 for the year 2003. This number has had a large increase in the departments of Paysandú and Río Negro, the latter to more than double when compared to 2001. In Soriano, the number has remained constant. One-third (33,4%) of the producers in Uruguay are in these three departments.

Soriano is the department that has the largest number of beehives (934 in 2000): more than half (52%), of the total number of beehives registered in Paysandú, Rio Negro, and Soriano are located there. Approximately 87% of the beehives are found in exploitations of thirds.

Soriano also has the greatest density of beehives, registering 10.4 beehives per square kilometer (each 100 has.). Paysandú and Río Negro have 3.3 and 4.3, respectively. These numbers surpass the verified amounts for the total of the country (2,4). Although Rio Negro has an amount of beekeepers similar to Paysandú, Paysandú still has the highest density of beehives.

The main destinations of the production are the domestic market and exports to the European market.

As responded by the beekeepers interviewed for this study, during recent years there has been a high mortality of bees. In 2001, 9,000 beehives died in the zone of influence closest to the coast of the river.

FISHING

The activity is mainly in the Uruguay River including 16 artisan fishermen in Paysandú, 90 in Rio Negro, and 20 in Soriano.

The destination of the artisan fish catch is mainly to the domestic market.

There are two fish storage places in Fray Bentos, they buy dorado, boga, and sábalo which are sold to Brazil. The harvest period is from December to February (sábalo) and April to May (boga), when a fisherman can obtain an average of 300 kilograms of fish per day.

One-half of the registered fishermen are dedicated to the activity permanently, and the remainder are active during the harvest for additional income.

The fishermen interviewed for this study have stated that, in the last few years, there has been a decrease in the amount of fish in the Uruguay River due to the rise of fishing, using fine mesh nets.

1.2. ARGENTINA: DEPARTMENT OF GUALEGUAYCHÚ

1.2.1 Specific information relating to Argentina

The Base Line relating was built mainly from secondary statistical information obtained from official sources. As a supplement, data from interviews done with qualified informants from the city of Gualeguaychú and members of the local community are reported. This information corresponds to the part of the department of Entre Rios, partially in the influence zone of the project.

The main source of secondary statistical information was INDEC. The National Population, Homes, and Housing for the 2001 Census year was used to cover the socio-demographic information for the Gualeguaychú department. Data with regards to the totality of the Entre Rios province was also obtained as part of that information. Secondly, the Survey of Hotel Occupancy for the year 2004, performed by INDEC, was used. This information was used in the section devoted to tourist activity of the Gualeguaychú department. The Farming National Census of the INDEC, made in 2002, was also used. The farming and forestry section also has as sources the Forestry Department, Handling Unit of the Forestry Evaluation System, and the Environment and Sustainable Development Secretariat.

In order to prepare the data tables on public health, morbidity, and mortality of the population, the data were obtained from the Ministry of Health and Environment of the Nation (Secretariat of Policies of Regulation and Sanitary Relations) and of the Direction of Statistics and Health information.

The disaggregation levels are Entre Ríos province, the department of Gualeguaychú, and the subdivisions into within that department.

1.2.2. Social Demographic Characteristics

Tables 58 to 64 of Annex III

Population, surface and density, annual average rate of growth. 2001

Department	Population	Density hab/km^2	Annual average rate of growth (0/00)
Gualeguaychú	101.350	14,3	11,4

SOURCE: INDEC, 2001

The department of Gualeguaychú contains about one-tenth of the total population of the province of Entre Ríos. It has a population similar to that of Paysandú department (113.244 inhabitants), and 40.3% of the total population of the Uruguayan area of influence.

The population growth during the 1991-2001 period was 13%, surpassing considerably the one confirmed in the Uruguayan departments. After a period of population stagnation between the years 1957 and 1970 a population increase has occurred, as recorded in the

1980 census. After another decade of stagnation a similar growth was repeated between the years 1991 and 2001.

The concentration of population is also higher than that of the Uruguayan departments on the other side of the Uruguay River. Its population density is 14,3 inhabitants per square kilometer, whereas Soriano recorded 9.3, the highest figure of the 3 Uruguayan departments.

Index of masculinity, percentage of urban population and percentage of population according to age gap. 2001.

Department	Index of masculinity	% urban population	% population 0 to 14 years	% population 15 to 29 years	% population 30 to 59	% population 60 years and more
Gualeguaychú	96	86,4	27,6	24,4	34,1	13,9

SOURCE: INDEC, 2001

As in the Uruguayan area of influence, there is a similar distribution by sex in Gualeguaychú. As in Paysandú and Soriano, there is a slight predominance of women.

Gualeguaychú, as well as Entre Ríos Province follows the same tendency of decreasing rural population as the Uruguayan departments. In absolute terms, Gualeguaychú shows a stabilization of its rural population between the years 1991 and 2001. In relative terms, there also was an increase of the urbanization of the department. The percentage of rural population (13,6%) is larger than the Uruguayan zone. The municipality of Gualeguaychú contains 75% of the population of the department.

The population distribution per age groups shows a similar profile to that of the Uruguayan departments. A relatively aged population, with a high percentage of the higher age groups of the population as a whole, is observed. Less than half of the population is 30 or more years old. The low birth rate (17,3) and mortality rate (7,70) confirms the characteristics of the population of the region as one of low population density.

Population projected (to the 30th of June of every year). Entre Ríos Province.

Year	Population
2005	1.154.618
2010	1.189.938

Source: INDEC

The population growth projected for the year 2010 is 2.7% in the Province of Entre Ríos. Specific data for Gualeguaychú department are not available, but in view of the annual average rate of growth, and the growth verified in the last census period, it may be assumed that it will surpass the figure estimated for the entire Province of Entre Ríos.

1.2.3. Social Development

Tables 65 to 69 of Annex III

Index of Human Development (IHD). 1996

Region	IHD
Total country	0.826
Entre Rios	0.801

Source: Argentinean program of Human Development (1999).

The following is a set of structural social development indicators. The Index of Human Development assumes relatively high values in Argentina and Entre Ríos in particular, although lower than the Uruguayan values in the area of influence. Entre Ríos Province shows a lower value than that of the whole of Argentina.

As in the case of the Uruguayan departments, these figures are greater than the Latin America average (0,749), and are similar to those registered by countries of high human development (0,879).

Rate of infantile mortality and life expectancy at birth

Province	Rate of Infantile mortality (2003)	Life expectancy at birth (1992)
Gualeguaychú	15,3	s/d
Entre Ríos	s/d	71,61

Source: INDEC

As a complement of IHD, this indicator presents the rate of infantile mortality. This indicator is very sensitive to sanitary conditions and poverty levels of the population. Although the figure is relatively low compared to those of Rio Negro and Soriano, an increase of the neonatal mortality occurs in 2002 and of post neonatal mortality in 2003.

Another important element to consider is life expectancy at birth. The figures for the Entre Ríos province are similar to those of the Uruguayan departments, observing a greater life expectancy in women than in men (approximately 7 years higher).

1.2.3.1 Incidence of Poverty in Homes

Tables 70 to 75 of Annex III

Gualeguaychú: Total of homes and population in homes with Unsatisfied Basic Needs [1]

% Homes with NBI	% Population in homes with NBI
11,3	12,7

SOURCE: INDEC - DEC.

It is observed that the population of Gualeguaychú has a minor proportion of homes in the situation of unsatisfied needs (11,3); when compared to the total of Entre Ríos Province (14,7), this percentage has been decreasing constantly since 1980.

In the area, low-income homes in general are composed of a larger number of members than the homes with higher incomes. This same indicator per person, the percentages are somewhat higher (17.6% for Entre Ríos and 12.7 for Gualeguaychú). 12,89% of the rural population are at the poverty level, according to the accepted definition of the poverty level.

The majority of the population of Gualeguaychú has access to the water supply system (89%), in a sustained area of coverage, and which is rated better in Entre Ríos than in the rest of the country. The availability of electric energy is guaranteed for 97% of the population. The sewerage system reaches 66% of the population in the homes of this department. The availability of water supply and sewerage systems is not common among the scattered rural population, and between the residents of government housing.

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[7] The Unsatisfaid Basic Need (NBI) were defined in agreement with the methodology used by INDEC in “La Pobreza en la Argentina” (Serie Estudios INDEC en “La Pobreza en Argentina” (Serie Estudios INDEC No. 1, Buenos Aires, 1984).

[8] The homes with Unsatisfied Basic Needs (NBI) are those homes showing at least one of the following deprivation indicators: 1- overcrowding: homes having more the three persons per room. 2- House: homes of inconvenient living type (pieza de inquilinato, precarious house or other type, excluding a house, department or ranch). 3- Sanitary conditions: homes without any type of latrine. 4- School attendance: homes having any child in scholar age (6 to 12 years) not attending school. 5- Subsistance capacity: homes having four o more people per working member, and, besides, if the head of the family has not completed the third grade of primary school.

1.2.4. EDUCATION

Tables 76 to 78 of Annex III

Gualeguaychú: Population of 15 years or more by maximum level of instruction reached. 2001

Maximum level of instruction reached	%
Without instruction/incomplete Primary	20,2
Primary complete/Secondary incomplete	49,2
Secondary incomplete/Tertiary or university incomplete	22,7
Tertiary or complete college studies	7,9
Total	100

Source: National census of Population, Homes and Houses 2001.-

As in the case of the Uruguayan departments there is a low percentage of illiterate individuals, being higher for men (2.65% of the individuals of 10 or more years of age) than for women (1,97%). In the majority, the population of 15 years or more has primary education complete or secondary incomplete. Less than 1 in 10 individuals has tertiary studies or complete college studies.

The basic education shows an important coverage in the department, as in the Uruguayan zone of influence. 30,6% of the inhabitants of Gualeguaychú of 3 or more years of age registers scholastic attendance, mainly in the government-run schools. 64,1% attended previously, and the remaining 5,3% never attended.

1.2.5. Employment

Tables 79 to 83 of Annex III

The department of Gualeguaychú has an economically active population (PEA) of 53.8%, similar to that of the area of influence in Uruguay. The PEA is composed of mainly working persons (72,9%). The percentage of working population is smaller among women.

Rates of unemployment, activity and employment by department. 2001

Department	Rate unemployment	Rate activity	Rate employment
Gualeguaychú	27	53,8	39,2

Source: INDEC, 2001

The rate of unemployment for Gualeguaychú is higher than those of the departments of the Uruguayan side. It must be noted that this figure is for the year 2001, the year of the Argentine economic crisis. It is confirmed that the rate of unemployment of the head of families is around 11%, both at the provincial level as well as for the department of Gualeguaychú. The rate for those who are not head of families is higher. The greatest rate of unemployment is in the municipality of Gualeguaychú, where it reaches 29.4% of the population.

The rate of activity (53,8%) and the rate of employment(39,2%) are similar to the recorded levels in the area of influence in Uruguay.

As in the Uruguayan departments, the most frequent category of employment is of employees (65%), in the private sector (42,6%). Next, there is an important percentage of independent workers (22,2%). The public sector has an important weight (%)in the use of manual labor, similar to the Uruguay figures.

With reference to the activity sector, in Gualeguaychú the services sector is important where 65.5% of workers are found.

1.2.6. Health

<u>**Tables 84 to 90 of Annex III**</u>

In the department of Gualeguaychú a high percentage of the population is not covered by social security and/or a plan of private health coverage (48,5%).

In Entre Ríos province, from 1984 to 2004 up to 25-10-04, 303 cases of AIDS with 111 deaths, and 690 infected asymptomaticos (Ministry of Health and Social Action) have been recorded. In Concord 59 deaths are registered; in Parana, 23; in Uruguay, 22; in Gualeguay, 3; in Gualeguaychú, 1; in Colón, 1; in Tala and in Nogoyá, 1.

The recorded cases, according to sex in the province, from 1984 and to 2004 (25.10.04), are 303 cases; this figure includes 16% women, and 84% men.

Deaths by suicides are greater among men than among women, and mainly among the persons who are 22 years or older.

For traffic accidents, in the department of Gualeguaychú a recent decrease is noted, although the number of deaths remains practically level for this type of accident.

With reference to availability of health services in the Province of Entre Ríos there are 604 clinic establishments, 150 are for out-patient services, with 6,751 beds available.

1.2.7. Public Security

<u>**Tables 91 to 92 of Annex III**</u>

The most frequent crimes in the Province of Gualeguaychú are crimes against property (67% of the criminal acts with intervention of a police officer in the year 2003). The second most frequent are crimes against people which includes 19.3% of the crimes recorded.

In Gualeguaychú, the rate of delinquency (per 10.000 inhabitants) has been increasing in recent years, reaching the figure of 241,6 in 2003. This figure is higher than the one for Entre Ríos Province (227).

1.2.8. Farming Activity

Tables 93 to 97 of Annexed the III

As in the case of the Uruguayan departments within the area of influence, there is a high percentage of small farms in Gualeguaychú (47.3% of the EAP have up to 100 hectares). There is also a high land concentration, 33 EAP of more than 3500 hectares have a land area similar to the 1594 EAP of up to 500 hectares.

62,7% of the EAP is found under property ownership undivided succession embracing 54,2% of the area.

In Gualeguaychú, almost 3 of each 10 hectares are used as planted area, mainly for annual farming (19,4%). 51.6% of the area is assigned to pasture, and 12,3% to forests and/or spontaneous woodland.

The main activity is cattle raising (61.5% of the land of the department is assigned to natural prairies and forages). Gualeguaychú has an important cabana activity, whose owners are not local to the area. There is considerable trading activity, where the performance of the COAGU Cooperative in the region stands out.

Forestry production

Total surface of the EAP with defined limits, by type of land use

Type of land use			Hectares	
			Entre Ríos	**Gualeguaychú**
Implanted area	Total		1.755.850,5	215.727,7
	Farming	Annual	1.178.739,3	141.211,6
		perennial	48.409,8	57,8
	Forages	annual	136.055,0	18.051,0
		perennial	275.884,4	54.103,0
	Forests and/or spontaneous woodland		113.977,0	2.209,0
	Farming without discriminating		2.785,0	95,3
Area destined to other uses	Total		4.595.662,1	512.469,4
	Pastures		2.622.146,8	375.980,3
	Forests and/or spontaneous woodland		1.549.678,8	89.474,6
	Apt not used		142.018,3	26.731,5
	Not apt or of waste		225.462,1	15.654,6
	Ways, parks and houses		45.898,4	4.628,4
	Without discriminating its use		10.457,7	
Total			6.351.512,6	728.197,1

Note: the period of reference of CNA 2002 is the comprised between 1º of July 2001 and the 30 of June of 2002.

Source: INDEC, National Farming Census 2002.

In the Entre Ríos province, the area assigned to forestry in 2002 includes 1.053.931 hectares. According to the National Farming Census the artificial forest plantations in Entre Ríos are of 113.977 hectares and in Gualeguaychú, 2209. This indicates a low level of forest exploitations in the area of influence. When looking at the total Province, including the Northern region, the forest area has greater importance.

1.2.9. Description of Specific Groups Related to the Use of the Natural Resources as a Subsistence Source

TOURISM

The Municipality of Gualeguaychú is very active with tourist activity. The tourist activity of the main presence in the city (Strategic Plan) has meant a differential tourist attraction that reaches its peak in the summer season with the Gualeguaychú Carnival. The tourist economic benefit coming mainly from the capital and from Buenos Aires Province is an annual event. Also favored by visitors and defined as "long week ends," where the option of Gualeguaychú combines proximity, sun, and beach, rural tourism and spas are widely accepted by the average and high-income sectors with a very strong impact in local consumption.

The Secretariat of Tourism of the Municipality estimates 447,000 tourists visited the zone in the summer season of 2005 (January, February, and the first March fortnight).

The main tourist attraction is the Carnival, in 2005, 200.000 adult tickets were sold, an activity that allows economic resources for 1500 families, from the Secretariat of Tourism of the Municipality. This activity is connected to the offer of "sun and beach." There are 12 bathing and camping areas in the zone, the majority on the Gualeguaychú River. The largest beach is Ñandubaysal on the Uruguay River, where 350 people work and it is visited by 160.000 tourists each year.

In recent years, a diversification of tourist attractions has been studied to maintain the amount of tourists all year round: thermal investments, an automobile race track, a center for fairs and conventions, a thematic casino at the Carnival, marina clubs, and protected natural areas.

The following table offers detailed information on the hotel supply and demand as an indicator of the impact of the projects on tourist activity.

Supply and hotel demand, selected indicators and type of establishment. Gualeguaychú. 2004

Hotel Indicators and type of establishment	January to February	March to May	June to September	October to December	TOTAL
Establishments	104	149	188	142	583
Rooms or units available	41866	62811	77471	60154	242302
Rooms or occupied units	23341	16292	18791	16399	74823
Seats available	131732	201022	249088	190978	772820
Seats occupied	69733	39028	37998	33732	180491
Percentage of occupation of the rooms or units	111.57	77.57	96.92	81.68	367.74
Percentage of occupation of the seats	105.98	57.96	60.88	52.86	277.68

Hotel Indicators and type of establishment	January to February	March to May	June to September	October to December	TOTAL
Duration of the stay average of the tourists, in days	6.71	7.04	8.81	6.29	28.85
Personnel occupied	525	658	807	664	2654

Source: INDEC, Survey of Hotel Occupation 2004.

BEEKEEPING

It is estimated that in Gualeguaychú there are 700 producers dedicated to beekeeping. Each beekeeper has in average 200 beehives, the production being approximately 35 kilos per beehive. Gualeguaychú produces 2% of the total honey of the country, and the main varieties are prairie honey and eucalyptus honey.

The beehives generate 4.000.000 dollars per year, and 90% of the honey production is exported, mainly to Europe, and next in volume to the United States.

A cooperative exists that serves the beekeepers of the region. There is also in the area one important connected industry that provides supplies (materials) to the local beekeepers.

FISHING

The artisan fishing in the Uruguay River is made by approximately 50 artisan fishermen throughout the year. At harvest time this figure doubles itself. There is one industrial fishery that manufactures fish flour, and works sporadically.

The destination of the fish produced is the domestic market and to the fishing industry.

It has been indicated that in the last seven years the amount of fish in the rivers has been decreasing. In “good times” they would catch up to 250 kilos of fish per day. At present, the most abundant varieties are boga and sábalo. Other species like dorado, patí and surubí are caught in lesser quantities.

CHAPTER II - CUMULATIVE SOCIAL IMPACTS

For the study of the cumulative social impacts of the projects an analytical effort was made that allowed to separate the impacts corresponding to the construction stage of the plants from their operation stage **[1]**, both for the Argentinean area of influence as well for the Uruguayan. For their systematic treatment, the impacts and mitigations for each country is presented separately.

Annex II shows a summary table of the main social impacts and mitigations measures.

2.1.1 Construction Phase

1. The direct social impact of the construction stage will be the affluence of people, mainly in the city of Fray Bentos and its surroundings, attracted by work opportunities that will be generated in the zone. An increase of the population is expected, mainly men and young people (given the profile of the required jobs in the phase of construction). The analysis of cumulative economic impact estimates that during the construction of the two plants there will be created *17.819 jobs (years people working): 7.783 direct ones, 6.897 indirect, and 3.139 induced (Cumulative Impact Study for two pulp mills and wood sources in Uruguay of PCI Americas & Malcom Pirnie).* It is estimated that given the characteristics of the local PEA and the area of influence, the demand for workers could only be covered partly with people from the region. Due to the inherent difficulties of manual labor to transit through the border, no quantitative significant migration flows are expected from Gualeguaychú towards Fray Bentos.

2. There will be an impact on the ability of the social services to cope with the new demand generated by this increase in population, particularly in the areas of housing, health, education, transport and recreational and cultural activities. The major pressure will be on the social services provided by the city of Fray Bentos. The specific impacts will depend on the relative numbers of local and outside residents that will occupy positions created during the two to three years of the construction stage.

3. Impacts in the Housing Area

3.1 There will be a substantial increase in the demand for housing, with the present supply available being quickly occupied and with an overflow into Mercedes, which is within daily commuting distance of the plants.

3.2 The cost of rental properties will increase, mainly in the Fray Bentos and neighboring areas.

3.3 There will be a demand for lower scale housing for the semi-skilled workers that will arrive in search of work or workers brought in by the construction contractors.

3.4 Pressure on the real estate market will be increased in the summer months of January and February because in addition to the increased demand for those employed in the plant construction there will be a demand for accommodation by tourists.

3.5 It is likely that, in order to satisfy demand for those with lower paying jobs, irregular housing will appear, most likely within the limits of the city.

3.6 The increase of the construction activities will generate an increase in the demand of bricks, increasing their price of such and providing greater income for brick manufacturers.

3.7 The potential expansion of the city will increase land values for common land and could result in this becoming classified as residential or industrial land.

4. Public Health

4.1 There will be an increase in the demand for health services at all levels, particularly in Fray Bentos and its vicinity.

4.1.1 Private health care will be needed for the workers in the plants, and their families, and for those employed in related activities.

4.1.2 An increase in public health provision will be required for those who cannot afford private health care, for example for families of workers with low levels of remuneration, itinerant workers and others, who might not be able to join the labor market and who have limited financial means.

4.2 As for any major construction project, it can be expected that there will be an increase in industrial accidents, in particular those involving multiple injuries, and in road accidents. There will also be an increase in sicknesses resulting from construction activities, all of which will require an extension of presently available health services and an increase in health service infrastructure.

4.3 Present health facilities would be hard pushed to attend adequately to large industrial accidents resulting from such things as landslides, truck collision, explosions and other occurrences.

4.4 There would be an increase in work related illnesses, for example, hearing and respiratory disorders related to noise and dust on the construction sites.

4.5 Certain sectors of the population would be subjected to increased stress as the pace of life in Fray Bentos quickens. Similarly workers would experience an increase in stress with the increase in noise levels during their daily work shifts.

4.6 It is expected that the influx of male migratory workers will result in an increase in the incidence of sexually transmitted diseases.

4.7 It is not expected to have an impact on the health of the inhabitants of the Department of Gualeguaychú.

5. Impacts in System of Transit and Transport

5.1 There will be a large increase in heavy vehicle traffic carrying construction materials, on main routes and on access roads to the plants.

5.2 There will also be an increase in demand for mass urban and interurban transit in order to move workers between their place of residence and the plants; this will occur within the city of Fray Bentos and to and from neighbouring towns and cities, resulting in an increase in traffic accidents for populations living along these routes.

5.3 The increased demand for passenger transport might lead to the increased use of inadequate, and potentially unsafe, means of transport for the movement of people, such as trucks.

5.4 There will be an increase the number of the traffic accidents and of the risks of more accidents involving the population located on and near the highways, over which the increased vehicular traffic will travel.

6. Impacts on conditions and characteristics of employment

6.1 There will be a positive social impact with the reduction of the rate of unemployment in the population in zone of influence, increase of the number of people economically active and an increase number of woman employed.

6.2 Some new jobs created by the projects will require skilled and higher level workers.

6.3 There is a lack of trained manpower with the area of influence to satisfy the requirements during the construction phase for these more highly skilled workers.

6.4 The creation of new jobs in commerce and in services will reduce the relative importance of public employment in the region.

6.5 Opportunities will open up for increased self-employment and for small and medium sized businesses to serve the plants, related industries and the more affluent general population, requiring both skilled labor such as auto mechanics, and unskilled labor, such as cleaners.

6.6 During the tourist season (January-February) increases in demand will lead to increased remuneration for those employed in tourist related occupations.

6.7 Hiring of manual labor by the companies will increase the proportion of formal labor. On the other hand increased activity in the services sectors will encourage an increase in informal employment, but not to the extent of formal employment generated by the construction of the plants and other established enterprises supporting that construction.

6.8 There may be a tendency for a reduction in the number of traditional retail establishments as sales on a larger scale increase the possibility of the establishment of larger enterprises, for example supermarkets. Certainly the investment climate in the Fray Bentos area should improve and with it an increase in the influx of new businesses that are already established outside the area of influence, in the industrial, commercial and service sectors. For this reason also small businesses within the immediate area of influence of the plants might be adversely affected.

7. Education

7.1 There will be an increase in the demand for public and private education, public education for the children of construction workers and the itinerant population; private education for children of technical and management personnel. The amount of educational support required will depend on the characteristics of the incoming population, whether they are with or without families and whether or not they reside in the area.

7.2 An expansion of the supply of private schooling can be expected.

7.3 There will be an increase in incentives to train workers in the specializations required for construction, for example metallurgy, sanitary engineering, construction etc.

7.4 The increased demand for specialized workers will result in the need to train more teachers in these fields.

7.5 On the other hand teachers in these fields at present serving the community will be attracted away from their current employment to attend to the needs of the plants, requiring that they be replaced, either by training or encouraging replacements from outside the area of influence.

7.6 Secondary school drop-outs might increase as the jobs offered by the plants might be more attractive to some than continuing their formal education.

8. Impacts in the quality of life

8.1 There will be changes in the quality of life for the population in the area of influence, most notably in Fray Bentos and in the surrounding area. The pace of life will increase with the influx of outsiders into the area, there will be an increase in traffic, with its attendant increase in noise and an increase in tourist and commercial activities.

8.2 There will be a greater demand for and supply of cultural and recreational events and activities. These activities will be induced by market forces and fomented or regulated by the local institutions.

8.3 The increase in rentals for the lease of accommodations will lead to an overall increase in the cost of living in the city of Fray Bentos and in neighbouring localities.

8.4 With the increasing population, it can be expected that there will be a rise in incidents of anti-social behavior and in crime.

8.5 With the arrival of a significant number of employees associated with the plants in the middle or higher social levels it is possible that there will be an increase in social stratification of the city of Fray Bentos.

8.6 The beginning of the construction works generated between the inhabitants of Gualeguaychú an increase of the feeling of vulnerability and distresses before the potential negative effects attributed to the cellulose plants. The mentioned subjective elements create uncertainty, which could bring about a decrease in investments related to the tourist sector.

8.7 During the period of construction, an increase of the conflict between Argentina and Uruguay can generate a negative impact, because there would take place a waste of possible opportunities to complement the know how and services between the regions in both riverbanks.

8.8 The installed collective situation in public spaces, mainly of the city of Gualeguaychú, has a positive aspect for the community, since it has generated a citizen mobilization around the environmental problem.

9. Impacts on the social groups that depend on the natural resources for their sustenance.

9.1 Tourism

9.1.1 The tourist industry should experience stability in the area, with the appearance of tourists with higher spending power related to the activities of the plants.

9.1.2 There will be a potential opportunity to generate new types of tourism that will compensate for the highly seasonal nature of the industry, being mostly related to the sun and the beach and limited to two months at present. The initiative by ENCE in setting up a nature reserve area, or zoological garden, adjacent to the M'Bopicuá plant site, which has an impressive stock of fauna in danger of extinction, has already attracted many visitors to the zone, including full bus loads of school children.

9.1.3 On the other hand, reports of heavy traffic, noise and the changes in the landscape produced by works of construction could discourage some potential visitors.

9.1.4 The possible actions from opposition to the installation of the plants on the part of the citizens of Gualeguaychú during the summer months could generate an adverse climate for continued increases in the number of Argentine tourists visiting Uruguay.

9.2 Fishing

9.2.1 It is not expected that the construction of the plants will have any significant effect on artisan, small scale fishing activities in the Uruguay River.

9.2.2 Fish in local markets could rise as a result of an increase in demand, which would increase the income of local fishermen.

9.2.3 Some temporary reduction may be experienced in fish catches in the vicinity of the new port site to be constructed by Botnia, slightly disrupting fish habitats but this should not have a long term effect.

9.3 Beekeeping

During the construction phase, with the plants observing all pertinent environmental regulations, there should be no negative impacts on honey producers in the area of influence.

10. If there were to be a serious accident during the construction phase, for example: a fire, spillage of fuel, actions which affected the turbidity of the river, there would be social consequences, depending on the seriousness of the incident. In an extreme case the livelihood of those depending on natural resources for their living could be affected: there could be a reduction in tourism and lower fish catches, which would negatively impact the living standard of the families affected.

11. Impact of Projected Demand of Raw Material in Expansion of Plantations and Land Tenancy and Land Use

11.1 In order to provide sufficient raw materials for the pulp mills new area will be artificially forested, starting during, and even prior to, the construction period. This increase in land dedicated to forestry will not have an important impact on overall land use in the area of influence, or in the country as a whole. The Forest Producers Association of Uruguay has estimated that for the year 2010, taking into account the needs for the new plants, there will be an increase of about 30% in the national area dedicated to forestry that is, the total area will increase from the present 645,330 hectares to about 800,000 hectares.

11.2 The increase the amount of forest lands will occur predominantly by owners of large properties, at present dedicated mostly to cattle ranching, reducing the amount of their land dedicated to cattle grazing. The increase in forest lands will not be a the expense of small scale farmers. It can be expected that medium sized farms might include some forest area as a strategy to diversify their production.

11.3 The increase of forestry activity will generate an increase in employment in this sector, which according to the Forest Producers Association of Uruguay could duplicate present forestry employment, passing from 10,110 persons employed in 2003 to 19,019 in 2010.

2.1.2 MEASURES TO MITIGATE ADVERSE IMPACTS DURING THE CONSTRUCTION PHASE

The following is a summary of the principal measures, being implemented or planned, designed to mitigate adverse social impacts resulting from the construction phase of the projects. This information was obtained through interviews and documentation from various sources.

i) in execution or planned

1. Housing

1.1 Botnia, in coordination with the Land Management Unit of the Municipality of Río Negro, is constructing low cost accommodation (700 to 1000 beds in 80 houses) to accommodate its workers that arrive in the area without families and is providing suitable housing for its higher level employees. The Municipality proposed that the houses be constructed in a zone which already possesses basic services so that at the end of the construction phase of the plants these properties can then be available for occupancy by low income families. Furthermore, Botnia is constructing 60 higher quality houses for permanent employees of the company. ENCE has acquired land for the construction of housing for its technical and administrative staff.

1.2 The Land Management Unit of the Municipality of Río Negro is coordinating with the National Directory of Land Use (DINOT) to plan for the expansion of urban areas, taking advantage of those areas, primarily in Fray Bentos, already having basic services and infrastructure.

2. Health

2.1 Both Botnia and ENCE include health specialists on their staff and have management plans to handle health risks and to prevent industrial accidents. Botnia has an agreement with the Ministry of Public Health (MSP) for 24-hour coverage inside its plants. ENCE has a system to attend emergencies within its construction site.

2.2 The MSP is working out a strategy to attend to the increased demand for health care, include additional emergency facilities at the Fray Bentos Hospital, a new psychiatric ward, the acquisition of equipment to permit rapid diagnosis of serious multiple injuries and arrangements with neighboring departments for rapid movement of patients. In Mercedes (Soriano) and Young (Río Negro) centers will be established for the treatment of trauma and in Mercedes there will be a neurosurgical unit. Patients requiring intensive care will be accommodated at the intensive care unit in Mercedes.

2.3 The MSP is putting into effect an epidemic awareness and education system to prevent and monitor any possible adverse health effects during the construction and operational phases of the plants.

2.4 Together with Botnia, the Fray Bentos Hospital has developed training courses for the treatment of serious multiple injuries, the principal problem resulting from industrial accidents.

2.5 Private health cooperatives in the various regional centers are planning a system of mutual cooperation. The cooperative AMEDRIN in Fray Bentos is working on an institutional coordination plan with CAAMS in Mercedes and CAMI in Young to attend the increased number of medical cooperative members, counting on the support of FEMI.

2.6 In compliance with labor norms, Botnia has planned a mechanism whereby member of the labor union become familiar with the location of emergency equipment and have been given instructions on its use. If union representatives discover any breaches in any security regulations they report these immediately to the appropriate authority within the company.

3. Transport

3.1 To minimize the adverse effects of increased vehicular movement associated with the construction of the plants, both companies have constructed dedicated access roads to their sites, with a direct connection to national highways. They are also planning specific routing of heavy goods vehicles to ensure that they do not pass through towns, close to schools and population centers, thereby minimizing risks of road accidents and avoiding changes to the quality of life of the population in the area of influence.

3.2 Both Botnia and ENCE will use river transport, where possible, to reduce the amount of traffic on roads and to alleviate the adverse effects of increased road transport.

3.3 The Transport Directory of the Municipality of Río Negro is planning to construct a by-pass to ensure that heavy vehicular traffic does not have to enter the city of Fray Bentos. This would imply considerable amount of road works for repaving that are still only in the planning stage. The Ministry of Transport and Public Works has been asked to plan rotaries and intersections for the national routes accessing the city. In the city of Fray Bentos the Direction of Transport has requested the Municipality to provide new road signs (particularly critical as the city's one way system is being changed), the construction of speed bumps and kerbs, more inspectors and more vehicles for the inspectors.

3.4 A truck parking area near the port has been planned near the Port of Fray Bentos, complete with basic services Also the accomplishment of a parking has been planned for trucks near the port of Fray Bentos with basic services, avoiding the need for parking on national highways.

3.5 An agreement is to be signed between the Municipality and the Ministry of the Interior to improve road safety and controls on national routes in Río Negro.

4. Education and Training

4.1 Agreements have been signed between the companies, the Ministry of Labor and Social Security and the National Employment Board for the setting up of advanced courses to train workers in skills that are not yet well developed in Uruguay, for example steel welding.

4.2 Both Botnia and ENCE have agreements with the UTU in Mercedes and the Agricultural College in Fray Bentos for the provision of internships and for the training of personnel.

4.3 Agreements have also been signed with private educational institutions to provide schooling for the children of plant workers.

4.4 ENCE is coordinating for provision of Catholic private education.

5. Quality of life

5.1 Foster activities (cultural, recreational, sports) of social integration in the region, mainly in the city of Fray Bentos, to mitigate the potential negative effects of social differentiation, offering elements of local reference for the social cohesion and the construction of an identity common between the local settlers and the migrants.

6. Tourism

6.1 To diversify the tourist attraction integrating both coastlines of the Uruguay River and to articulate it with the increase the cultural attraction that it will produce in the zone, having added the cultural tourism to the “sun and beach" tourism that at the moment predominates in the area.

7. Border Integration

7.1 Generate a flow of more uniform information between Uruguay and Argentina and to restore spaces to discuss between both coastlines in a way to diminish the uncertainty in the populations.

7.2 To strengthen the local coordination instances of the existing binational organisms like the Commission Administrator of the River Uruguay (CARU), articulating it with the created special Mixed Commission between chancelleries of both countries, to allow a more direct bond of it with the local and regional people, generating a flow of more uniform information in the influence area.

7.3 To impel a regulatory frame of border undertakings and its pursuit in which the projects of the cellulose plants could be framed.

7.4 In synthesis, it is important in this stage to put emphasis in mitigations that impel the construction and implementation of binational spaces of social and environmental gobernanza that allows to reinforce the ties that unite both border regions and to solve its conflicts. These scopes must include the different organizations and social interests to fortify the citizenship and the capacity of local management to face the challenges that will impose the phases of construction and operation of the plants.

2.2.1 Operational Phase

Impacts on the Uruguayan area of influence during the operational phase

Any adverse impacts during the operational phase would result from the operation of the plants and/or the final stages of construction.

1. Housing

1.1 In comparison to the construction phase there would be a reduction in overall housing demand and a corresponding reduction in the cost of renting. There would be a corresponding reduction in the cost of rentals.

1.2 However, for more expensive properties there could be an increase in demand owing to demand by high level operational administrators, technicians and skilled labor involved in operation of the plants and of new enterprises supplying the pulp plants.

2. Health

2.1 There will be a diminished demand for public health services as the permanent work force, and their families, will be correspondingly less than during the construction phase.

2.2 The decrease in the number of workers engaged by the plants should result in a reduction of industrial accidents and a change in the nature of the accidents.

2.3 There will be an increased risk of traffic accidents involving persons that reside on the main routes followed by trucks carry raw materials to the plants.

2.4 If there should be a serious industrial accident it would more likely result in an increase of sicknesses such as allergies or conditions affecting the central or periphery nervous systems.

3. Transport

3.1 As mentioned above, there will be a higher probability of road accidents as truck traffic related to the operations of the plants will require the movement of about 400 large vehicles per day to supply the plants at full production with raw materials.

4. Conditions and characteristics of employment

4.1 There will be a change in the occupational patterns in the region, with a reduction in construction workers and increases in forestry, transport and services.

4.2 The increased demand for transport workers will extend to: drivers, mechanics, warehouse workers, those engaged in the supply of fuel, and, indirectly, for workers in related service industries: lodging, restaurants, bars, insurance, vehicle sales, banking, etc.

4.3 There might be some unemployment compared to the construction phase, leading to a lack of social protection for workers in the affected sectors.

4.4 The good investment climate influenced by the operations of the pulp mills, should result in the opening up of opportunities for self-employment by those that lost their jobs subsequent to the ending of the construction phase.

4.5 Accomplish commercial agreements between the industrials of Gualeguaychú and the pulp mills for reinforcing jobs generation in the industrial sector of the zone.

5. Education

5.1 Demand for private education in the area of influence will not fall off with the reduction in employment at the plants, but rather is more likely to rise with the influx of more highly educated personnel involved in the operational phase. The demand will cover pre-school, primary and secondary education.

5.2 It is possible that there could be a return to the educational system by students that dropped out to take low skill level jobs during the construction phase, as there would be a reduction in the availability of those job opportunities and a realization of the value of obtaining higher skills in order to secure jobs during the operational phase, either at the plants or in related industries.

6. Quality of life

6.1 There will be a tendency towards greater social stratification in the city of Fray Bentos with the influx of operational personnel for the plants and other related industries in the higher social and educational categories.

6.2 It is possible that there will be less job opportunities for the population in the area of influence during this phase.

7. Impacts on social groups that depend on natural resources for their living

7.1 Tourism

7.1.1. The tourist industry will suffer from the decrease in the number of people circulating in the area of influence. However, the industry could maintain the gains made during the construction phase, taking advantage of the increase number of cultural and recreational activities begun during that phase, which would appeal to tourists from with the country.

7.1.2. The possibility of offensive smells originating from the plants for several days per year, changes in the pristine nature of the countryside as a consequence of the presence of the plants and the increase in heavy goods traffic could deter tourism in the area of influence.

7.2 Fishing

7.2.1 Artisan fishing in the Uruguay River should not be affected significantly by impacts associated with the operation of the plants if, as expected, they conform to existing environmental norms.

7.3 Beekeeping

7.3.1 As in the case of artisan fishing, beekeeping within the Uruguayan area of influence should also not be affected significantly by impacts associated with the operation of the plants if, as expected, they conform to existing environmental norms.

8. Social impacts resulting from a possible industrial accident

In the event of an industrial accident such as spills of chemical products, fires, contaminating emissions, etc, that would cause significant pollution of the air or water, there would be serious social consequences. Such an accident could provoke respiratory disease, allergies, nervous system disorders, among other things. There could also be a substantial adverse effect on tourism, principally at the beach resort of Las Cañas in Río Negro, for which the Municipality of Río Negro is trying to secure classification as a certified natural beach and obtain a 'green globe' from the European Union. Some tourists might, as a result of the bad publicity following a major accident, avoid the area of influence. Beekeepers could see a reduction in the production of honey and/or a reduced chance of overseas sales and fish stocks in the Uruguay River could be reduced. There would be a subsequent reduction of income to those relying on natural resources for a living.

9. Demand for Raw Material

9.1 As a result of the projects there will be an increase in the amount of forestry area. But this increase will not substantially change the land use profile in the Uruguayan area of influence, as this will remain predominantly dedicated to cattle grazing. There will be an increase in forestry employment. The commercial forestry products industry will increase in size in the area of influence. Most new land for forestry will be provided by land owners with existing cattle farms and will result in the conversion of land at present used for cattle grazing and will not reduce the supply of agricultural crop land.

9.2 The installation of the plants and its operation would generate an increase of the area of forest plantation in the Argentinean zone, bordering with Uruguay and the increase of the lumber commerce in the region.

2.2 MITIGATION OF ADVERSE IMPACTS DURING THE OPERATIONAL PHASE

The mitigation measures for the operation phase include the sustainability and adaptation of proposed measures for the phase of construction that are pertinent as much as are the expected social impacts of placing the plants in operation, mainly in the area of health, labor accident prevention, traffic, and the transportation system. In addition, a series of specific measures to mitigate the problems from the operation phase are set forth.

i) Measures in execution or planned

1. As it was previously mentioned, mitigation measures are not being developed or planned on the part of the different stakeholders from Gualeguaychú, as they are not considering the zone having the two cellulose plants.

2. Beehives monitoring planning of cautious measures on the part of Apicultural Society of Uruguay in case of death of the beehives due to the activity of the plants.

3. Establishment of *"The Development Agency,"* integrated by the IMRN and 12 companies among them Ence and Botnia, with the objective of stimulating strategic projects.

ii) Proposed measures

1. Creation of an Study Center with the purpose of monitoring and analyzing the evolution of the possible social impacts of beginning the operation of the plants, which would be integrated by the companies, State, local government, actors of civil society, workers and NGO's.

2. To reinforce road safety measures and controls, both for vehicles as a well as for drivers. Implementation of complementary and improvement courses for truck drivers who transport wood.

3. To create training opportunities for micro industries to take advantage of the opportunities that come from the operation phase of the plants and to mitigate the reduction of jobs once construction is completed.

4. Construction or repairs to houses to take care of the demand of houses of high quality.

5. Reinforce the health area and coordinate with the region in case of serious accidents, strengthening this area and making contingent plans to respond to such events.

6. To extend the tourist supply incorporating new destinations related to the rural tourism, industrial tourism, a forestry route. To incorporate to the tourism circuit the two cellulose plants and the Area of Conservation of M'Bopicuá. Articulation with the tourist and cultural attraction of Gualeguaychú. Articulation of the region of coastal zones of both sides of the Uruguay River, implementing a tourist circuit that integrates the tourist and cultural attraction of the zone.

7. Implementation of binational spaces where the different affected, and representative groups can participate from civil society organizations in the Uruguayan zone of influence to coordinate and to share information on:

7.1 Monitoring contamination in the Uruguay River and the atmospheric contamination in the area of influence of the projects.

7.2 Monitoring the beehives installed in the zone.

7.3 Permanent epidemiology Monitoring, with special attention to the diseases that can be related to the activities of the plants.

8. Planning and implementation of mechanisms for the possible transfer of beekeepers and the relocation of beehives.

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LINKS OF INTEREST

Following appears a listing of Web pages in which statistical data on the social profile of the areas of influence can be obtained.

Argentina

Statistics and Census Direction (DEC). Entre Ríos Government
www.entrerios.gov.ar/dec

National Institute of Statistis and Census (INDEC)
http://www.indec.mecon.ar/

Ministry of Health
http://www.msal.gov.ar/htm/default.asp

Statistics and Health Information Direction
http://www.deis.gov.ar/

Ministry of Social Development
http://www.desarrollosocial.gov.ar

Ministry Of Health and Social Action – Entre Ríos
http://www.entrerios.gov.ar/msas/

Ministry of Economy and Production – Agriculture, Cattle, Fishery and Food Secretariat (SAGPyA)
www.sagpya.mecon.gov.ar

Ministry of Health – Secretariat of Environment and Sustainable Development – National Direction of Natural Resources and Conservation of the Biodiversity
www.medioambiente.gov.ar/bosques/default.htm

Gualeguaychú Development Corporation
www.codegu.com.ar

www.gualeguaychuturismo.com

Uruguay

National Statistics Institute
www.ine.gub.uy

Ministry of Education and Culture
http://www.mec.gub.uy/educacion/estadistica.htm

General Forestry Direction MGAP
http://www.mgap.gub.uy/Forestal/DGF.htm

Ministry of Cattle, Agriculture and Fishery
www.mgap.gub.uy

Ministry of Public Health
www.msp.gub.uy

Ministry of Sport and Tourism
www.mintur.gub.uy

Commercial and Industrial Asociation of Río Negro
www.acirn.org

Society of Forestry Producers of Uruguay
http://www.spf.com.uy/

Uruguayan Apicultural Society
www.sociedadapicola.org.uy/

Argentina

Direction of Statistic and Census (DEC). Government of Entre Ríos
www.entrerios.gov.ar/dec

National Institute of Statistic and Census (INDEC)
HTTP://www.indec.mecon.ar/

Ministry of Health
HTTP://www.msal.gov.ar/htm/default.asp

Statistics and Health Information Direction
HTTP://www.give.gov.ar/

Ministry of Social Development
HTTP://www.desarrollosocial.gov.ar

Ministry of Health and Social Action – Entre Ríos
HTTP://www.entrerios.gov.ar/msas/

Ministry of Economy and Production - Secretariat of Agriculture, Cattle ranch, Fish and Foods (SAGPyA)
www.sagpya.mecon.gov.ar

Ministry of Health - Environment Secretariat and Sustainable Development - NationalDirection of Natural Resources and Conservation of the Biodiversity - Direction of Forestry
www.medioambiente.gov.ar/bosques/default.htm

Corporation of Gualeguaychú Development
www.codegu.com.ar

www.gualeguaychuturismo.com

Uruguay

National Institute of Statistics
www.ine.gub.uy

Ministry of Education and Culture
HTTP://www.mec.gub.uy/educacion/estadistica.htm

General Forestry Direction MGAP
HTTP://www.mgap.gub.uy/Forestal/DGF.htm

Ministry of Cattle ranch, Agriculture and Fishery
www.mgap.gub.uy

Ministry of Public Health
www.msp.gub.uy

Ministry of Sport and Tourism
www.mintur.gub.uy

Commercial and Industrial Association of Rio Negro
www.acirn.org

Society of Forest Producers of Uruguay
HTTP://www.spf.com.uy/

Uruguayan Apicultural Society
www.sociedadapicola.org.uy/

Glossary of abbreviations

ANEP	Administración Nacional de Educación Pública
DEC	Dirección de Estadística y Censos del Gobierno de Entre Ríos
DINAMA	Dirección Nacional de Medio Ambiente
EAP	Explotaciones agropecuarias
ECH	Encuesta Continua de Hogares
IDH	Índice de Desarrollo Humano
IMRN	Intendencia Municipal de Río Negro
INDEC	Instituto Nacional de Estadística y Censos
INE	Instituto Nacional de Estadística
IPH	Índice de Pobreza Humana
JUNAGRA	Junta Nacional de la Granja
MEC	Ministerio de Educación y Cultura
MGAP	Ministerio de Ganadería Agricultura y Pesca
MS	Ministerio de Salud
MSP	Ministerio de Salud Pública
MVOTMA	Ministerio de Vivienda, Ordenamiento Territorial y Medio Ambiente
NBI	Necesidades Básicas Insatisfechas
PEA	Población Económicamente Activa
PNUD	Programa de las Naciones Unidas para el Desarrollo

ANNEX I - Synthesis of indicators of social profile

This annex shows a synthesis of the main indicators for which it was possible to find comparable information for the Uruguayan and Argentinean areas of influence.

Indicator	Region	Value	Date	Observations
Total Population	Paysandú	113.244,00	2004	
	Rio Negro	53.989,00	2004	
	Soriano	84.563,00	2004	
	Gualeguaychú	101.350,00	2001	
Surface in km2	Paysandú	13.984,00	2005	
	Rio Negro	9.563,00	2005	
	Soriano	9.008,00	2005	
	Gualeguaychú	7.086,00	2005	
Population Density (hab/km2)	Paysandú	8,10	2004	
	Rio Negro	5,70	2004	
	Soriano	9,30	2004	
	Gualeguaychú	14,30	2001	
% Intercensal growth	Paysandú	1,70	1996-2004	
	Rio Negro	4,80	1996-2004	
	Soriano	3,60	1996-2004	
	Gualeguaychú	13,00	1991-2001	
% masculine population	Paysandú	49,70	2004	
	Rio Negro	51,27	2004	
	Soriano	49,59	2004	
	Gualeguaychú	49,00	2001	
% feminine population	Paysandú	50,30	2004	
	Rio Negro	48,70	2004	
	Soriano	50,41	2004	
	Gualeguaychú	51,00	2001	
Rate of masculinity	Paysandú	99,00	2004	
	Rio Negro	105,00	2004	
	Soriano	98,00	2004	
	Gualeguaychú	96,00	2001	
% urban population	Paysandú	92,37	2004	
	Rio Negro	87,49	2004	
	Soriano	90,22	2004	
	Gualeguaychú	86,40	2001	
% rural population	Paysandú	7,63	2004	
	Rio Negro	12,51	2004	
	Soriano	9,78	2004	
	Gualeguaychú	13,60	2001	

Indicator	Region	Value	Date	Observations
Projections of population to the 2010 (to the 30 of June)	Paysandú	116.387		
	Rio Negro	56.513		
	Soriano	88.449		
	Entre Rios	1.189.938		
% of population of 0 to 14 years	Paysandú	27,61	2004	
	Rio Negro	28,04	2004	
	Soriano	25,95	2004	
	Gualeguaychú	27,60	2001	
% of population of 15 to 29 years	Paysandú	22,44	2004	
	Rio Negro	22,57	2004	
	Soriano	22,83	2004	
	Gualeguaychú	24,40	2001	
% of population of 30 to 59 years	Paysandú	33,52	2004	
	Rio Negro	34,33	2004	
	Soriano	33,72	2004	
	Gualeguaychú	34,10	2001	
% of population of 60 years and more	Paysandú	16,44	2004	
	Rio Negro	15,06	2004	
	Soriano	17,48	2004	
	Gualeguaychú	13,90	2001	
Rate gross natality (per thousand inhabitants)	Paysandú	18,55	2004	
	Rio Negro	17,91	2004	
	Soriano	17,65	2004	
	Gualeguaychú	17,30	2003	
Rate gross mortality (per thousand inhabitants)	Paysandú	8,59	2004	
	Rio Negro	7,95	2004	
	Soriano	9,62	2004	
	Gualeguaychú	7,70	2003	
Rate of infantile mortality (per thousand inhabitants)	Paysandú	13,60	2003	
	Rio Negro	19,60	2003	
	Soriano	17,60	2003	
	Gualeguaychú	15,30	2003	
Rate of HIV per 100.000 inhabitants	Paysandú	47,50	2004	
	Rio Negro	71,60	2004	
	Soriano	65,00	2004	
	Gualeguaychú	s/d		
Rate of AIDS per 100.000	Paysandú	16,10	2004	

Indicator	Region	Value	Date	Observations
inhabitants				
	Rio Negro	34,80	2004	
	Soriano	27,00	2004	
	Gualeguaychú	s/d		
Life expectancy at birth	Paysandú	75,89	2004	
	Rio Negro	75,97	2004	
	Soriano	75,36	2004	
	Entre Rios	71,61	1992	
Indicator	**Region**	**Value**	**Date**	**Observations**
Index of Human Development	Paysandú	0,83	2002	
	Rio Negro	0,84	2002	
	Soriano	0,84	2002	
	Entre Ríos	0,80	1996	
Index of Gini	Paysandú	0,41	2002	Urban Population
	Rio Negro	0,38	2002	Urban Population
	Soriano	0,43	2002	Urban Population
Breach of income	Entre Ríos	32,3	2002	Urban Population
Percentage of population with NBI	Paysandú	32	2002	Urban Population
	Rio Negro	17	2002	Urban Population
	Soriano	27	2002	Urban Population
	Gualeguaychú	12,70	2001	
Percentage of homes with NBI	Paysandú	22	2002	Urban Population
	Rio Negro	10	2002	Urban Population
	Soriano	17	2002	Urban Population
	Gualeguaychú	11,30	2001	
Illiterate % of population 14 or more years of age	Paysandú	0,90	2004	
	Rio Negro	1,50	2004	
	Soriano	2,30	2004	
Illiterate % of population 10 year of age or more	Gualeguaychú	2,30	2001	
% of population of 14 or more years of age without instruction or with primary incomplete	Paysandú	14,50	2004	
	Río Negro	11,50	2004	
	Soriano	17,50	2004	
% of population of 15 or more years without incomplete primary instruction or	Gualeguaychú	20,20	2001	
% of more active population of 14 years or	Paysandú	59,40	2004	Urban Population
	Rio Negro	44,50	2004	Urban Population
	Soriano	59,13	2004	Urban Population
	Gualeguaychú	53,90	2001	

Rate of unemployment	Paysandú	16,20	2004	Urban Population
	Rio Negro	3,50	2004	Urban Population
	Soriano	16,90	2004	Urban Population
	Gualeguaychú	27	2001	
Rate of activity	Paysandú	59,40	2004	Urban Population
	Rio Negro	43,70	2004	Urban Population
	Soriano	59,00	2004	Urban Population
	Gualeguaychú	53,8%	2001	
% of the occupied population of employees deprived public or	Paysandú	72,10	2004	Urban Population
	Rio Negro	57,30	2004	Urban Population
	Soriano	65,00	2004	Urban Population
	Gualeguaychú	65,00	2001	

Indicator	Region	Value	Date	Observations
% of the occupied population or independent worker	Paysandú	23,30	2004	Urban Population
	Rio Negro	38,80	2004	Urban Population
	Soriano	28,10	2004	Urban Population
	Gualeguaychú	22,20	2001	
% of population occupied in the primary sector	Paysandú	9,30	2004	Urban Population
	Rio Negro	12,40	2004	Urban Population
	Soriano	9,70	2004	Urban Population
	Gualeguaychú	13,10	2001	
% of population occupied in the secondary sector	Paysandú	23,60	2004	Urban Population
	Rio Negro	19,40	2004	Urban Population
	Soriano	18,30	2004	Urban Population
	Gualeguaychú	17,50	2001	
% of population occupied in the tertiary sector	Paysandú	67,10	2004	UrbanPopulation
	Rio Negro	68,20	2004	Urban Population
	Soriano	71,90	2004	Urban Population
	Gualeguaychú	65,50	2001	
Total Rate of crimes (per 10.000 inhabitants)	Paysandú	257	2003	
	Rio Negro	388	2003	
	Soriano	334	2003	
Rate of delinquency (per 10.000 inhabitants)	Gualeguaychú	241,6	2003	
Number of operations	Paysandú	2.402,00	2000	
	Rio Negro	1.361,00	2000	
	Soriano	2.197,00	2000	
	Gualeguaychú	1.909,00	2002	
Surface exploited (in hectares)	Paysandú	1.344.639,00	2000	
	Rio Negro	947.055,00	2000	
	Soriano	833.689,00	2000	
	Gualeguaychú	728.197,10	2003	
Average hectares by operation	Paysandú	559,80	2000	
	Rio Negro	695,85	2000	
	Soriano	379,47	2000	
	Gualeguaychú	381,45	2002	
Nº hectares dedicated to forestry	Paysandú	91.487	2003	
	Rio Negro	87.174	2003	
	Soriano	24.845	2003	
Nº hectares artificial plantations	Gualeguaychú	2.209	2002	

Number of beekeepers	Paysandú	400,00	2003
	Rio Negro	416,00	2003
	Soriano	599,00	2003
	Gualeguaychú	700,00	2005

Indicator	Region	Value	Date	Observations
Number of beehives by square km (per 100 hectares)	Paysandú	3,30	2003	
	Rio Negro	4,30	2003	
	Soriano	10,40	2003	
Number of beehives	Gualeguaychú	140.000,00	2005	
Number of artisan fishermen on the Uruguay River	Paysandú	16,00	2005	
	Rio Negro	90,00	2005	Fray Bentos, New Berlin, San Javier
	Soriano	20,00	2005	Villa Soriano
	Gualeguaychú	50,00	2005	
Number of tourists (January to March)	Paysandú	17.534,00	2004	Paysandú and Spas of Guaviyú
	Rio Negro	29.517,00	2004	Cañas and Fray Bentos
	Soriano	7.285,00	2004	Mercedes
	Gualeguaychú	447.000,00	2004	Source: Interview with Director of Tourism

ANNEX II - Summary of Impacts and Mitigation Measures
PLANTS CONSTRUCTION PHASE

	IMPACT	MEASURES PLANNED Or IN EXECUTION	PROPOSE MEASURES
WORK MARKET	Increase of the demand of manual labor (esteem that in this stage 17819 jobs will be created). Reduction of the rate of unemployment and the increase of the rate of activity in the zone of influence	Botnia company is managing the demand of manual labor through lists of hope that specify the formation of the postulants	To generate a space of permanent coordination between the companies Botnia and Ence to manage jointly the affluence of workers in the zone, the training of the manual labor and to coordinate the hiring of the workers (in particular those that have been enabled specifically for this instance in function of his respective times of construction To implement mechanisms that facilitate the border transit of inhabitants of the city of Gualeguaychú so that they can carry out labor activities in the construction of the plants.
	Creation of jobs that will require an average and high qualification profile. Lack of qualification of the manual labor in the influence area to be able to have more access to the positions described in the phase as construction. Possible increase of participation of women in the work market	Agreements between the companies and the Ministry of Work and Social Security and the National Board of Work for the implementation of advanced training courses destined to cover the demand of skilled labor at the moment little developed in the country, for example welders.	Implementation of diversified strategies of qualification by part of UTU and the National Board of Work. In the last case, since selection of beneficiaries of the qualification programs prioritizes a vulnerable sectors of the population, these strategies of qualification could in addition hit positively on the fairness of the opportunities of qualification and work. It is necessary to increase the offer of day-care centers and the prescholar level of the public educational system to facilitate the participation of women in work opportunities On the other hand, it would be excellent that the companies implemented policies of fair promotion in hiring manual labor
	Increase of the structure of opportunities for the generation of diverse strategies of life in different sectors of the population: selfemployment possibilities and micro-undertakings, mainly in services, including personal services		Promotion of the development of PYMES through training and granting micro-credits. These actions could articulate efforts of the private sector, NGOs (Ex.: DESEM and other programs of juvenile undertakins) and the state (programs of the National Board of Work and others).
	Segmentation of the work market: increase of the formality of the workers contracted for the works, and possible increase (of smaller relative weight) of the informality due to self employment		Intensification of labor them inspection and promotion of formalization of the PYMES through the facilitación of micro-credit subject to the fulfillment of the corresponding norm.
	Possible reduction of the employment level in the traditional retail commerce due to the great scale installation of economic undertakings.		To impel scopes of training and association between small retailers to be able to cope with the challenges of the competition of the large commerce that can settle in the zone. Estimulating the asociation between small retailers would increase their power of purchase, and the opportunities of training would prepare them for a possible commercial reconversion. This effort could articulate to specific actors with the collaboration of the public sector through the municipality

	IMPACT	MEASURES PLANNED Or IN EXECUTION	PROPOSE MEASURES
AREA HABITACIONAL	Due to the affluence of people to the zone an important increase in the demand of houses will take place. Fast exhaustion of the real estate market of Fray Bentos and expansion of the demand towards the city of Mercedes. Significant increase in the cost of the rents, mainly in Fray Bentos and surrounding zones.	The local real estate agents are beginning to incorporate to their portfolio houses of nearby towns and the tourist circuit Botnia has advanced in the coordination with the Unit of Territorial Territorial of Management of IMRN for the construction of temporary collective houses for workers without their families (700 to 1000 beds in 80 houses). Once finalized the construction stage the constructed houses to lodge single workers could be recycled and be destined to the needy sectors of the population.	Incorporation of seasonal tourist infrastructure (bungalows, motels, houses for rent, mainly in the Balneario Las Cañas) to the group of houses for residential purposes for the technical personnel, specialized and managemental personnel of the companies. The generation of a system of interurban transportation that allows daily transfer at low cost is key to avoid stimulating the residence transfer of the workers to the zone, diminishing the pressure on real estate market and the rest of the services
	Increase of the demand of high quality houses uality for more qualified workers .	ENCE has acquired lands for the construction of houses for the technical and managemental personnel of its plants. 60 houses of good quality are being built for permanent civil employees of the Botnia company.	Increase of the housing offer in the zone of Las Cañas to avoid the pressure on the real estate demand in Fray Bentos
	Possible generation of irregular settlements for the people of lower sectors that flow to the zone.	The Unit of Territorial Management is working with the National Direction al of Territorial Ordenance (DINOT) elaborating a Master Plan to plan the expansion of the urban zones	The promotion measure to the low cost inter urban transportation system is valid at this point. On the other hand, it is advisable to implement strategies of communication to inform clearly to the population about requirements and conditions to work in the zone, as a mean to avoid stimulating the migration of people with little probabilities of being employed.
	Valuation of rural land in the surrounding zones of the city and possible change in the use of the land in this area for residential and/or industrial use.	The Unit of Territorial Management is working with the National Direction of Territorial Ordenance (DINOT) elaborating a Master Plan to plan the expansion of the urban zones	To fortify regulation actions in order to control the real estate speculation and to protect the land with high productive potential, within the framework of an integrated territorial planification that maximizes the use of urban areas with services and basic infrastructure.

	IMPACT	MEASURES PLANNED Or IN EXECUTION	PROPOSE MEASURES
PUBLIC HEALTH	Due to the affluence of people to the zone, the demand for health services at all levels will increase specially in the city of Fray Bentos and surrounding zones. Within this demand it is necessary to differentiate, on the one hand, the simple increase due to the increase of the number of inhabitants of the zone, and, on the other hand, the change in profile of the specific demand of health care that derives from traffic accidents, labor accidents and professionals diseases. Increase of the demand of private coverage for health services for the workers of the plants and connected activities, and their families.	The MSP plans to install a new emergency ward at the Fray Bentos Hospital, with an area of intermediate care, a new psychiatry room psychiatry, the acquisition of a tomograph, the articulation with neighboring departments for a fast derivation. An trauma area in Mercedes would be consolidated (Soriano) and in Young (Rio Negro) and a neuro surgery area in Mercedes (Soriano). The are no plans to build an Intensive Care Center (CTI) in Fray Bentos. The cases that need this type of attention will be derived mainly to the CTI of Mercedes. Also, the MSP plans to orchestrate an epidemiology monitoring plan and of education to prevent and monitor possible effects in the health of the population during the process of construction and operation of the plants. The Mutualist AMEDRIN of Fray Bentos is planning an institutional coordination plan of regional character with CAAMS of Mercedes and CAMI of Young to take care of the increase of the number of affiliates, counting on FEMI support.	To create a plan of action and training in the province of Gualeguaychú for possible accidents during the phase of construction of the plants that can potentially affect the population of the area of influence. It will be advisable to consolidate a regional system of health care that includes Mercedes, Fray Bentos, Paysandú and Gualeguaychú to neutralize the weaknesses in health care in Fray Bentos and to canalize the increase in the demand of this service. To consolidate a regional system of health care that includes Mercedes, Fray Bentos, Paysandú and Gualeguaychú to neutralize weaknesses in health in Fray Bentos and to canalize the increase in the demand of this service
	Increase of the probability of labor accidents.	Both companies have prevension technicians and plans for the management of risks in the companies. ENCE has an emergency system in the area of the works. Botnia has made an agreement with the MSP to cover during the 24 hours the interior of the plant. Jointly with Botnia, the Hospital of Fray Bentos has developed an advanced training course for the treatment of seriously politraumatized. For the fulfillment of the labor regulations in effect the Botnia company has anticipated a mechanism by means the members of the union of workers observe the availability of safety equipment and on the other hand, the use that workers make of them.	It will be necessary that the local dependencies of the Ministry of Work jointly with the Ministry of Public Health maximize the security measures and the controls, implementing a monitoring and follow up system of the diseases related to the construction works, particularly respiratory and auditory, and the level of stress problems. The Insurance Bank of the State will have to collect the necessary taxes to take care of the probable increase of labor accidents associated with the construction stage .

	IMPACT	MEASURES PLANNED Or IN EXECUTION	PROPOSE MEASURES
	Increase of probability of the traffic accidents	Planning itineraries that affect the least the population that reside on the routes.	To increase the traffic inspections, the alcoholemia controls and the road training.
	Possible increase in stress of the workers to be subject to the effect of the noise of more intense way during its labor day.	Botnia anticipates the use of special equipment to reduce the effect of noise in the workers.	To1.032 use all the industrial safety measures available to avoid related professional diseases related with exposure to noise. To work during specific hour, avoiding the night shift.
	Possible increase of the incidence probability of the diseases of sexual transmission.		Increase the sanitary controls to sexual workers to mitigate the increase of diseases of sexual transmission and to facilitate access to prophylaxis means (in charge of the MSP)
TRANSIT SYSTEM And TRANSPORT	It will increase the traffic of trucks in the routes and access roads to the zone of the plants, for the transport of materials of the construction.	The companies have built routes of access to their works with direct exit to national routes. Specific routes for the traffic are being planned of trucks studying the best itinerary to avoid going through populated cities, schools, centers, etc. Both companies use or have planned to use the fluvial transport through the Uruguay River of its production to avoid overloading the highways. The MTOP has been asked to implement roundhouses and crossings in the national routes which have access to the city. The Transportation Direction of the IMRN plans to make a by-pass, so that the load traffic that has to enter Fray Bentos to obtain specific services, use the belt roads. This would imply considerable road works of repaving, but that is only in the planning stage. En the Fray Bentos city the Tranportation Direction requested the IMRN, a place for service inspections, new road signs (the flechado of the streets is being changed), construction of shoulders and sidewalk curbs, more inspectors and vehicles to perform inspections. An agreement will be signed in the near future between the IMRN and the Ministry of the Interior to increase the road safety and controls in the national routes in the area of influence. .	Assure the availability a good system of public transportation at accessible costs to allow the circulation of workers between the cities of the region and to mitigate the residence transfer of the workers Fray Bentos, reducing the pressure on the different services. This will also contribute to the decentralization of the development in the region.
	Increase of the demand of urban and interurban transportation services to transfer the workers to the works.		A adjustment of the transportation service will be required to transfer the workers to the plants and major inspections to guarantee that these are done in suitable conditions, diminishing the risk of accidents.

	IMPACT	MEASURES PLANNED Or IN EXECUTION	PROPOSE MEASURES
	Possible increase inadequate transportation means to transfer people (trucks for example) in order to move workers to their jobs.		The increase of public transportation means available to the population in general would be advisable.. The companies would have to orchestrate systems of transportation for the employees of their works.
	Possible increase of the probability of the occurrence of traffic accidents and growth of road insecurity, particularly the population near the highways.	An agreement between the IMRN and the Ministry of Interior to increase to the road safety and controls in the national routes in the area of influence. The accomplishment of a parking lot near the port of Fray Bentos, with basic services has been planned for trucks.	An increase of the inspections and to launch campaigns of road education. It would be desirable to promote agreements between the companies and the National Administration l of Primary Education for the accomplishment of conferences on road education and traffic safety, particularly in schools which are close to the highways.
EDUCATION	An increase of the demand for education services, for both primary and secondary levels in the public sector (free) as well as in the private sector.	The companies maintain training agreements and pasantías with the UTU of Mercedes and the Agrarian School of Fray Bentos. Also they have made agreements with the private educational institutions in order to take care of the children of the workers of the plants	To advance in Training agreements with the National Board of Work and the UTU, requiring the coordination with the companies to determine the specialization areas in which they are going to demand workers. Extend the capacity of the public educational system in pre scholar, primary and secondary levels. This would as well allow a greater insertion of women with children in prescholastic age in the work market. Anticipate filling the educational vacancies that can be produced in the education system of the influence area.
	Expansion of the educational offer in the private sector.	ENCE and Botnia are coordinating with institutions of the private education sector to cover the demand of the children of its employees of the plants.	
	Potential expansion of the educational offer in the technical formation, and training for the job. Changes in the profile of the technical qualification demanded by the population will take place, mainly that related to construction on the one hand and to forestry on the other hand. The global level of technical qualification in the population will increase.	Agreements between the companies and the Ministry of Work and Social Security and the National Board of Work have been signed to implement advanced training courses to cover the demand of specialized workmanship which at the moment is little developed in the country; for example welders.	This deals with a positive impact that can be strengthend, choosing strategically the qualification areas. And on the other hand, taking into account what qualifications respond to the short term demand but which could be articulated with productive needs at medium and long term, to make more efficient expenditures.
	Probable decrease of human resources for educational activities in specialties (engineering, electromechanical, among others) as the professors will be requested by the companies.		To design strategies to attract human resources for teaching, obtained from nearby localities

	IMPACT	MEASURES PLANNED Or IN EXECUTION	PROPOSE MEASURES
	Possible increase of student desertion in the secondary sector - mainly technician, due to the increase of the expectations and opportunities to find a job.		Increase of the supply of courses in nocturnal schedule and relaxation of currícula (for example, design by multiple modules of shorter duration) it stops to allow to articulate the perception of income with the permanence in the system educativo
QUALITY OF LIFE	In the influence area, in special in the city of Fray Bentos a change of the daily rhythm of life will take place due to the affluence of people to the zone, and to the increase of traffic, the increase of the tourist and commercial activities, the increase of the public and road insecurity, and the risk of accidents.	In order to obtain a better communication with the population during the phase of construction, Botnia will destine a public telephone number to canalize questions or to have people express their concerns. The ENCE Company, jointly with the Faculty of Social Sciences of the UDELAR, have made a series of workshops with the members of the local society of Fray Bentos for inform them about their undertakings, the implications and their characteristics.	From the local governments the increase could be impelled of cultural and sport activities, mainly those that they foment identity, integration and the social cohesion
	Increase of the demand for cultural activities and of relaxation.	The Direction of Tourism of the IMRN is elaborating a plan to take care of the demand for relaxation and cultural activities of the population, articulating the effort of the local cultural agents (music, theater, cinema, spectacles).	To articulate efforts of the agents local public and deprived to increase the supply cultural, sport and recreational of the zone, that can include the promotion of tours of theater groups, musicians, etc., originating of the capital and other points of the form country to diversify the local cultural supply.
	Increase of the cost of life in the neighboring city of Fray Bentos and nearby cities.		No there is a measurement specific mitigación for this point: the mitigación of this single effect can be from the effective application of several of the measures already mentioned previously, between which they emphasize the tie a to diminish the pressure on the real estate sector and the implementation of system of Inter-departmental transport.
	Possible increase of the probability of the occurrence of crimes against property and alteration of the públic order.	An increase of the local police force is anticipated; the elaboration of a plan to increase the security of the citizens , preventing the increment of crimes against property.	In addition of the necessary reinforcing of the monitoring and prevention police officer in the mediate thing, this diminution of the crimes also one will tie to the efficiency of the strategies of promotion of social integration that is implemented
	Possible increase of the differentiation and social stratification of the city of Fray Bentos		To foment cultural, recreational, sport activities of social integration in region, fundamentally in the city of Fray Bentos, to mitigate potential negative effects of the social differentiation, offering elements of local reference for the social cohesion and the construction of a common identity between the local settlers and the migrantes.

	IMPACT	MEASURES PLANNED Or IN EXECUTION	PROPOSE MEASURES
	Increase of vulnerability feeling between the citizens of Gualeguaychú in view of the potential negative effects attributed to the cellulose plants. The subjective elements mentioned create uncertainty and may be able to affect the climate of businesses in particular individual in the tourism sector.		Generate a flow of more uniform information between Uruguay and Argentina and restore spaces for the discussion between both riverbanks, to diminish the uncertainty in the population.
BORDER INTEGRATION	The conflict between Uruguay and Argentina generates a lack to make use of the opportunities that undertakings may generate os and the possibility of complementing with the know how and services between both countries in the influence area.	Creation of the Mixed Commission on the part of chancellors of both countries to treat their ideas with regards to the implementation of the plants	To impel a regulatory frame of border undertakings in which the projects of the cellulose plants may be frames. In addition to the previously mentioned specific actions, it is recommended to promote spaces for the different agencies concerned in the negotiation to diminish the conflict level and to promote the binational advantage of the opportunities. To strengthen the local coordination instances the existing binational organisms like the Commission Administrator of the Uruguay River (CARU), articulating it with the created special Mixed Commission between chancelleries of both countries, to allow a more direct bond of them with the local and regional actors, generating a flow of more uniform information in the influence area.
TOURISM	The stability in the number of tourists in the area is expected. An increase in tourist presence with greater spending power could be possible, and on the other hand another segment could be discouraged due to the traffic, the noise and changes in the landscape produced by the construction sites.		To diversify the tourist offer integrating both riverbanks of the Uruguay River and to articulate it with the increase of the cultural offer that probably will take place in the zone, adding the cultural tourism to the" sun and beach" tourism that at the moment predominates in the zone
	Opportunity to generate tourist offers for the different seasons of the year.	The Direction of Tourism of the IMRN is looking for a diversification of the tourist offer of the zone. As tourist attraction a ' forestall route forestal' is being coordinated and would incorporate the visit to the plant of Botnia.	To follow working in the joint efforts of the public and private concerned people for the diversification of the tourist offer. Articulation of the region in both riverbanks Uruguay River implementing a tourist circuit that integrates the tourist and cultural offers of the zone, and the visit to the plants.
	The possible increase of the opposed actions to the installation of the plants, on the part of the citizens of Gualeguaychú during the months of summer could generate a climate adverse for the affluence of Argentine tourists.		To reinforce the indicated actions of border integration in the corresponding section.

	IMPACT	MEASURES PLANNED Or IN EXECUTION	PROPOSE MEASURES
	In case that during the construction an extraordinary accident should take place, the period of affectation could register, impacts that affect this sector. A decrease of the tourist activity in the zone would take place, affecting negatively the standard of life of the families related to the sector.		Reinforce all the labor safety measures and inspection corresponding to the security systems implemented by the companies.
FISHING	It is probable to receive an increase in the price of the fish due to a greater demand, which could induce an increase in the income of fishermen.		No mitigation measures are required
	The construction sites of a new port could affect during some periods of time the habitat of the fish and, therefore, diminish the amount of fish in the Uruguay River. In case that during the construction an extraordinary accident should take place,the period of affectation could register impacts that affect this sector. This would bring about a decrease of the fishermen income due to the decreases of fish in the Uruguay River		Generate a system of continuous environmental monitoring, that include short periods of time, to be able to early detect any impact on the ennvironment and to avoid the social effects of the environmental phenomena.
BEEKEEPIN G	During the construction stage in a scene of contamination in the levels allowed by environmental regulations, negative impacts are not expected for producers of honey in the region.		In principle mitigación measures are not required
DEMAND OF RAW MATERIAL	Increase of the forestry area. The predominant agricultural-cattle raising profile is maintained in the area of influence .		No mitigación measures are required
	Probable transfer of large cattle properties to forestry. No displacement of small producers is anticipated. Possible incorporation of the medium producers to forestry as a strategy to diversify its production.	The central government is reformulating the forest law to protect the areas with productive potential and to avoid their use for forestry. Ond the other hand, there is the state subsidy to the forestry activity, bringing about discouragment to increase the activity.	The mitigation measures in this point are related to the strategic planning of the use of the land and the reinforcement of the regulations in effect that regulate it, as well as of the inspections that guarantee their fulfillment.

	IMPACT	MEASURES PLANNED Or IN EXECUTION	PROPOSE MEASURES
	Increase in the sources of employment in the forestry sector (secondary sources consider that it will be duplicated)		To create the mechanisms necessary to guarantee that the companies respect the regulations in effect in the sector relative to work conditions, union rights, remuneration and health coverage.

PLANTS OPERATION PHASE

The mitigation measures of the operation stage includes the sustainability and adaptation of the proposed measures proposals for the phase of construction. These measures are still pertinent in as much they are related to the expected social impacts when starting the operation of the plants, mainly in the health area, prevention of labor accidents, traffic and transport system. In addition to such measures, following are a series of specific measures submitted for the problematic proper of the phase of operation.

	IMPACT	PLANNED Or IMPLEMENTED MEASURES	PROPOSE MEASURES
WORK MARKET	Decrease of the demand for manual labor non qualified at the end of the construction stage	Conformation of the *"Development Agency"* with the objective of moving strategic projects, integrated by the IMRN and 12 companies, among them Ence and Botnia.	
	Increase of the demand for carrier services or in relation to vehicles (mechanics, deposits, fuel, etc.) or for the drivers (baths, dining rooms, etc.). In the occupation structure a modification will be generated, reducing the weight of the construction and increasing weight to the services sector. Generation of jobs of high qualification		Create training instances toe form micro industralists to take advantage of the opportunities that derive from the stage of operation of the plants and to mitigate the reduction of the jobs once concluded their construction. To articulate with the necessary anticipation the strategies of qualification of the local manual labor and of the bordering departments so that their residents can indeed have access to these positions
	A commercial flow between the industries of Gualeguaychú and the cellulose could be generated for the provision of inputs that could reinforce jobs in the industrial sector.		To facilitate at state level the necessary agreement instances so they may take advantage of the opportunities at both riverbanks of the Uruguay River.
HOUSE	The high level housing demand for managers, technicians and skilled labor of the plants as well as for the new undertakings related to the phase of operation could be reinforced.		Construction or repais off houses to take care of the demand high quality housing.
	In relation to the construction stage a reduction of the demand in some housing sectors and a decrease in the price of the rent could be generated.		Mitigation measures are not required
PUBLIC HEALTH	Smaller probability of occurrence of labor accidents and change in the types of accidents. Greater demand on the system of health tie to the possible increase of the labor accidents and to probability of increase of the professional diseases, as well as to growth of the probability of the traffic accidents.		Stregthening of the health area in general and design the contingency plans in case of serious accidents. Coordination of the health services of the area of influence so that in the event that a serious accident should occur, the contingencies can be taken care of this event.

	IMPACT	PLANNED Or IMPLEMENTED MEASURES	PROPOSE MEASURES
	In case that during the operation extraordinary accident takes place during the period of affectation, impacts related to the health of the population, increasing the prevalence of respiratory diseases, allergies, diseases of the nervous system, among others, could be registered..		The measurement of mitigación in this case is the strict fulfillment of the regulations in effect and accomplishment of monthly reports on the incidence of diseases.
TRANSPORT	Important Increase of the circulation of trucks in the influence area (it is considered 400 daily trucks) to transfer the raw materials to the plants. With this road insecurity and the traffic accidents will increase.		Reinforce the safety measures and in roads and controls both to vehicles as well as to drivers. Implementation of advanced training courses specific for truck drivers of those which carry wood.
EDUCATION	ihe demand for educational private services will be maintained or will increase, both for the primary and thhe secondary levels. On the other hand, it is probable that the demand of public education diminishes in as much there will be a contingent of workers with their families who will leave the zone. This will diminish the possible overpopulation of public educational schools.		No mitigation measures are identified
CALIDADE LIFE E BORDER INTEGRATION	A process of intensification of the social stratification of the city of Fray Bentos with the consolidation of high and the average sectors is expected.		As in the construction stage, it will be advisable to reinforce cultural activities taking of steps that foment integration and social cohesion. Create a Training center to monitor and to analyze the evolution of the possible social impacts of starting the operation of the plants, integrated by the companies, the State, local government, actors of civil society, workers, and NGOs.
	Possible divergences between the different actors on the effects from the plants.		Implementation of binational spaces where the different affected groups and representatives of the civil society organizations of the civil society of the Uruguayan area of influence can participate to coordinate and to share information on: . Monitoring of the contamination in the Uruguay River and the environmental contamination in the area of influence of the projects. . Monitoring of the beehives installed in the zone. . Permanent Epidemiology Monitoring with special attention to diseases that can be related to the activities of the plants.

	IMPACT	PLANNED Or IMPLEMENTED MEASURES	PROPOSE MEASURES
SECTORS THAT DEPEND OF THE NATURAL RESOURCES	The tourist will have less circulating population in the area during the pre-operating stage. The possible generation of bad odors during some days of the year, the modification of the landscape, and the increase of the vehicular flow can be elements that could discourage a segment of the tourist activity in the area of influence.		Articulate the tourist offer of the region incorporating new destinies which are related with rural tourism, industrial tourism, route of forestry, to the traditional ones of sun and beach, thermal and the Carnival of Gualeguaychú. Incorporate to the tourist cicuit the two cellulose plants and the Conservation Area of M'Bopicuá.
	The artisan fishery and beekeeping would not display significant impacts associated to the phase of operations in the measurement in which the operation of the plants adjust to the effective environmental regulations.	Monitoring beehives and planning cautious measures precautorias by of the Apicultural Society of Uruguay in case of loss of life of the beehives caused by the activity of the plants. Monitoring the fish of the Uruguay River	Planification and implementation of mechanisms to transfer the beekeepers and re-location of beehives in case alterations of them are verified. Generate work alternatives for affected fishermen.
	In case that during the operation an extraordinary accident should occur, during the period of affectation there could be registered, the loss of work sources in the tourist sector because of the retraction of the affluence of tourists, reduction of the income of the beekeepers by the affectation of honey production and/or its positioning for export, and/or a decrease of fish in the Uruguay River affecting the sustenance of the homes related to that natural resource.		The mitigation measure is the strict fulfillment of the environmental regulation in effect. In this sense, it is proposed the conformation of technical monitoring groups integrated with social actors commited in the thematic .
DEMAND OF MATTER PREMIUM	Expected increase of the area devoted to forestry plantation. This increase will not imply an important change in the use of the land, keeping the predominant cattle raising and agriculturist of the influence area. Increase of work sources in the forestry sector. An increase or lumber commerce in the region would be generated and a possible increase of the forest plantation area in the Argentinean side.		Reinforce labor inspections to assure the fulfillment of the regulations in effect, in the different plantations

ANNEX III – Statistic Information

1.1.2 SOCIODEMOGRAPHIC CHARACTERISTICS

Table 1

Total Population, Absolute Growth and Intercensal Variation, by Departament. Period 1996-2004

Departamentos	Population according to Census 1996	2004	Absolute Growth	Variat. Intercensal (%)
Paysandú	111.347	113.244	1.897	1,7
Río Negro	51.522	53.989	2.467	4,8
Soriano	81.618	84.563	2.945	3,6

SOURCE: INE, 1996-2004

Table 2

Population, surface and density. 2004

Departamento	Population	Area en km^2	Density $inhab/km^2$
Paysandú	113.244	13.984	8,1
Río Negro	53.989	9.563	5,7
Soriano	84.563	9.008	9,3

SOURCE: INE, 2004

Table 3
Population according to sex and masculinity index. 2004

Área	Population Total	Population Men	Population Women	Índex of masculinity
Paysandú				99
Cases	113.244	56.278	56.966	
%	100	49,7	50,3	
Río Negro				105
Cases	53989	27679	26310	
%	100	51,27	48,73	
Soriano				98
Cases	84563	41932	42631	
%	100	49,59	50,41	

Source: INE, Censo Fase 1, 2004

Table 4
Population según área and sex. 2004

Área	Urban Area			Rural Area		
	Total	Men	Women	Total	Men	Women
Paysandú						
Cases	104.598	50.915	53.683	8.646	5.363	3.283
%	92,37	48,68	51,32	7,63	62,03	37,97
Río Negro						
Cases	47234	23535	23699	6755	4144	2611
%	87,49	49,83	50,17	12,51	61,35	38,65
Soriano						
Cases	76296	37301	38995	8267	4631	3636
%	90,22	48,83	51,04	9,78	56,02	4,3

Source: INE, Censo Fase 1, 2004

Table 5
Population by Age groups and sex. 2004

Age groups	Paysandú			Río Negro			Soriano		
	Total	Men	Women	Total	Men	Women	Total	Men	Women
Total	113.244	56.278	56.966	53.989	27.679	26.310	84.563	41.932	42.631
0 a 4	9.723	4.998	4.725	4.684	2.394	2.290	6.924	3.496	3.428
5 a 9	10.975	5.529	5.446	5.289	2.691	2.598	7.659	3.896	3.763
10 a 14	10.567	5.386	5.181	5.163	2.614	2.549	7.363	3.714	3.649
15 a 19	9.803	5.089	4.714	4.449	2.342	2.107	7.159	3.607	3.552
20 a 24	8.096	4.285	3.811	3.821	2.077	1.744	6.335	3.236	3.099
25 a 29	7.510	3.755	3.755	3.918	1.995	1.923	5.819	3.017	2.802
30 a 34	7.502	3.858	3.644	3.734	1.923	1.811	4.877	2.417	2.460
35 a 39	6.397	3.140	3.257	3.254	1.719	1.535	4.869	2.396	2.473
40 a 44	6.821	3.340	3.481	3.226	1.674	1.552	5.160	2.602	2.558
45 a 49	6.315	3.113	3.202	2.926	1.549	1.377	4.860	2.434	2.426
50 a 54	5.955	2.933	3.022	2.936	1.530	1.406	4.699	2.312	2.387
55 a 59	4.965	2.420	2.545	2.457	1.273	1.184	4.057	2.076	1.981
60 a 64	4.780	2.360	2.420	2.131	1.107	1.024	3.475	1.741	1.734
65 a 69	4.171	1.905	2.266	1.897	938	959	3.218	1.573	1.645

	Paysandú			Río Negro			Soriano		
Age groups	**Total**	**Men**	**Women**	**Total**	**Men**	**Women**	**Total**	**Men**	**Women**
70 a 74	3.824	1.768	2.056	1.595	778	817	3.113	1.421	1.692
75 a 79	2.685	1.182	1.503	1.212	548	664	2.277	989	1.288
80 a 84	1.820	756	1.064	785	338	447	1.586	629	957
85 a 89	845	305	540	343	125	218	744	270	474
90 a 94	375	126	249	142	57	85	300	88	212
95 o más	115	30	85	27	7	20	69	18	51

Source: INE, 2004

Table 6
Number of private homes, Population in those homes and size of average home, according to department. Year 2004

	Private Homes	Population in Private homes	Average size Of the home
Paysandú	33.691	111.378	3,3
Río Negro	15.786	52.705	3,3
Soriano	26.105	83.699	3,2

Source: INE, Census, Phase 1, 2004

Table 7
Paysandú: Projected Population according to sex and are (to june 30 of each year).

Year	Population				
	Total	Femenine	Masculine	Rural	Urban
2010	116.387	58.387	58.000	8.308	108.079
2015	117.777	58.877	58.900	7.885	109.892
2020	118.960	59.206	59.754	7.399	111.561
2025	119.707	59.282	60.425	6.882	112.825

Source: National Institute of Statistics

Table 8
Río Negro: Projected Population according to sex and area (to june 30 of each year).

Year	Population				
	Total	Femenine	Masculine	Rural	Urban
2010	56.513	27.679	28.834	6.729	49.784
2015	58.001	28.481	29.520	6.499	51.502
2020	59.426	29.242	30.184	6.255	53.171
2025	60.664	29.907	30.757	5.981	54.683

Source: National Institute of Statistics

Table 9
Soriano: Projected Population according to sex and area (to june 30 of each year).

	Population				
Year	Total	Femenine	Masculine	Rural	Urban
2010	88.449	44.536	43.913	7.786	80.663
2015	90.931	45.694	45.237	7.215	83.716
2020	93.333	46.795	46.538	6.603	86.730
2025	95.533	47.794	47.739	5.929	89.604

Source: National Institute of Statistics

Locations in the area of influence of the projects

Table 10
PAYSANDÚ: Population by Age groups, according to location and sex. 2004.

Location and Sex	Population										
		Age groups									
	Total	0 a 3	4 a 5	6 a 14	15 a 19	20 a 24	25 a 29	30 a 49	50 a 64	65 a 79	80 o más
TOTAL	113.244	7.529	4.324	19.412	9.803	8.096	7.510	27.035	15.700	10.680	3.155
Men	56.278	3.867	2.203	9.843	5.089	4.285	3.755	13.451	7.713	4.855	1.217
Women	56.966	3.662	2.121	9.569	4.714	3.811	3.755	13.584	7.987	5.825	1.938
Paysandú	73.272	4.320	2.486	11.609	6.307	5.247	4.724	17.442	10.867	7.812	2.458
Men	34.865	2.223	1.245	5.833	3.193	2.718	2.279	8.294	4.955	3.253	872
Women	38.407	2.097	1.241	5.776	3.114	2.529	2.445	9.148	5.912	4.559	1.586
Nuevo Paysandú	7.468	685	414	1.719	755	543	497	1.773	652	371	59
Men	3.853	363	210	895	390	291	235	892	358	184	35
Women	3.615	322	204	824	365	252	262	881	294	187	24
Chacras de Paysandú	5.082	386	233	910	406	333	377	1.319	615	374	129
Men	2.626	196	113	459	216	168	187	695	308	221	63
Women	2.456	190	120	451	190	165	190	624	307	153	66
Guichón	5.025	363	225	964	452	288	296	1.153	645	484	155
Men	2.455	183	120	483	222	152	153	559	299	218	66
Women	2.570	180	105	481	230	136	143	594	346	266	89
Quebracho	2.813	251	136	587	249	210	191	620	313	207	49
Men	1.439	121	75	301	124	103	103	314	165	114	19
Women	1.374	130	61	286	125	107	88	306	148	93	30
Tambores	1.180	99	55	223	85	69	83	261	168	101	36
Men	615	49	29	117	52	32	45	130	85	56	20
Women	565	50	26	106	33	37	38	131	83	45	16
San Félix	1.149	73	48	235	124	79	77	286	116	99	12
Men	601	38	26	134	69	38	36	142	62	51	5
Women	548	35	22	101	55	41	41	144	54	48	7
Piedras Coloradas	1.113	94	52	216	106	80	83	256	113	90	23
Men	573	44	29	108	51	43	37	144	56	45	16
Women	540	50	23	108	55	37	46	112	57	45	7
Porvenir	1.035	100	38	192	84	105	64	220	113	99	20
Men	559	52	20	110	49	56	36	114	61	50	11
Women	476	48	18	82	35	49	28	106	52	49	9

Lorenzo Geyres	674	67	38	152	48	47	43	154	59	51	15
Men	327	34	18	64	27	25	25	74	31	23	6
Women	347	33	20	88	21	22	18	80	28	28	9
Gallinal	655	71	37	164	46	51	47	177	44	18	-
Men	337	41	19	76	30	22	21	93	23	12	-
Women	318	30	18	88	16	29	26	84	21	6	-
Chapicuy	637	63	26	123	61	63	45	144	63	41	8
Men	346	39	11	70	35	31	19	73	38	27	3
Women	291	24	15	53	26	32	26	71	25	14	5
Merinos	540	46	29	133	59	30	31	107	56	35	14
Men	273	26	18	70	31	14	14	45	28	19	8
Women	267	20	11	63	28	16	17	62	28	16	6
Orgoroso	516	53	25	110	48	47	44	113	44	27	5
Men	271	33	12	47	27	25	27	59	28	11	2
Women	245	20	13	63	21	22	17	54	16	16	3
El Eucaliptos	401	40	14	95	28	35	22	89	50	23	5
Men	207	19	9	43	19	16	12	44	27	15	3
Women	194	21	5	52	9	19	10	45	23	8	2
Casablanca	390	31	19	73	34	33	31	98	32	31	8
Men	197	18	7	34	18	13	17	53	15	17	5
Women	193	13	12	39	16	20	14	45	17	14	3
Beisso	375	40	22	73	32	35	35	72	30	24	12
Men	205	26	14	42	17	18	21	35	16	12	4
Women	170	14	8	31	15	17	14	37	14	12	8
Cerro Chato	360	35	30	80	34	24	21	65	39	28	4
Men	203	19	19	47	22	12	11	33	23	15	2
Women	157	16	11	33	12	12	10	32	16	13	2
Morató	252	28	12	61	17	19	21	57	29	8	-
Men	132	13	6	28	12	10	10	33	15	5	-
Women	120	15	6	33	5	9	11	24	14	3	-
Constancia	227	26	12	54	15	17	20	66	9	7	1
Men	115	18	7	23	6	7	11	35	4	4	-
Women	112	8	5	31	9	10	9	31	5	3	1
Cañada del Pueblo	208	24	7	45	29	18	12	41	20	10	2
Men	108	11	4	21	14	10	8	22	12	6	-
Women	100	13	3	24	15	8	4	19	8	4	2

Estación Porvenir	190	18	13	49	16	9	15	46	14	9	1
Men	86	11	5	16	5	5	4	27	8	5	-
Women	104	7	8	33	11	4	11	19	6	4	1
La Tentación	148	16	6	26	13	11	10	25	26	11	4
Men	73	11	2	10	8	6	4	12	12	5	3
Women	75	5	4	16	5	5	6	13	14	6	1
Esperanza	145	8	1	20	18	5	10	50	15	15	3
Men	73	2	1	8	10	5	6	25	10	6	-
Women	72	6	-	12	8	-	4	25	5	9	3
Arbolito	144	15	8	33	18	11	7	26	16	9	1
Men	68	6	3	13	8	4	5	14	11	4	-
Women	76	9	5	20	10	7	2	12	5	5	1
Piñera	118	8	6	20	6	8	11	22	18	15	4
Men	55	4	1	9	2	4	5	11	8	10	1
Women	63	4	5	11	4	4	6	11	10	5	3
Piedra Sola	112	7	2	15	10	4	8	18	21	20	7
Men	52	5	-	9	3	3	3	8	10	7	4
Women	60	2	2	6	7	1	5	10	11	13	3
Queguayar	108	10	5	29	9	6	13	27	9	-	-
Men	58	3	4	16	5	3	7	15	5	-	-
Women	50	7	1	13	4	3	6	12	4	-	-
Villa María (Tiatucura)	67	6	3	14	2	4	5	17	7	6	3
Men	40	2	3	7	1	2	2	12	6	4	1
Women	27	4	-	7	1	2	3	5	1	2	2
Bella Vista	55	5	2	17	4	3	3	16	3	2	-
Men	32	1	2	11	3	2	-	10	2	1	-
Women	23	4	-	6	1	1	3	6	1	1	-
Puntas de Arroyo Negro	52	8	4	13	6	2	6	7	6	-	-
Men	30	4	2	9	3	1	4	3	4	-	-
Women	22	4	2	4	3	1	2	4	2	-	-
Pueblo Federación	47	2	1	6	7	2	4	7	9	8	1
Men	21	-	1	2	-	1	3	4	6	4	-
Women	26	2	-	4	7	1	1	3	3	4	1
Cuchilla de Fuego	27	1	-	7	1	3	4	6	5	-	-
Men	13	-	-	2	-	2	3	3	3	-	-
Women	14	1	-	5	1	1	1	3	2	-	-

Pueblo Alonzo	13	2	1	1	1	-	-	1	3	4	-
Men	7	-	1	1	1	-	-	-	1	3	-
Women	6	2	-	-	-	-	-	1	2	1	-
Rural	8.646	528	314	1.344	673	655	650	2.254	1.471	641	116
Men	5.363	252	167	725	416	443	402	1.424	1.018	448	68
Women	3.283	276	147	619	257	212	248	830	453	193	48

Source : National Institute of Statistics – CENSUS PHASE I 2004

Table 11
Río Negro: Population by Age groups, according to Location and Sex.

	Population										
		Age groups									
Location and Sex	**Total**	**0 a 3**	**4 a 5**	**6 a 14**	**15 a 19**	**20 a 24**	**25 a 29**	**30 a 49**	**50 a 64**	**65 a 79**	**80 o más**
TOTAL	53.989	3.676	2.056	9.404	4.449	3.821	3.918	13.140	7.524	4.704	1.297
Men	27.679	1.855	1.060	4.784	2.342	2.077	1.995	6.865	3.910	2.264	527
Women	26.310	1.821	996	4.620	2.107	1.744	1.923	6.275	3.614	2.440	770
Fray Bentos	23.122	1.524	829	3.923	1.933	1.685	1.671	5.359	3.345	2.191	662
Men	11.240	760	407	1.997	993	869	821	2.639	1.587	930	237
Women	11.882	764	422	1.926	940	816	850	2.720	1.758	1.261	425
Young	15.759	1.066	647	2.979	1.352	1.058	1.137	3.846	2.014	1.321	339
Men	7.910	542	341	1.506	707	550	565	1.931	990	641	137
Women	7.849	524	306	1.473	645	508	572	1.915	1.024	680	202
Nuevo Berlín	2.438	185	101	456	237	149	149	541	329	220	71
Men	1.257	99	47	231	127	84	63	279	177	113	37
Women	1.181	86	54	225	110	65	86	262	152	107	34
San Javier	1.680	121	69	275	115	107	111	371	250	202	59
Men	845	63	40	144	54	55	54	187	128	89	31
Women	835	58	29	131	61	52	57	184	122	113	28
Barrio Anglo	818	63	40	147	87	69	64	207	85	41	15
Men	414	35	21	77	44	39	25	107	41	22	3
Women	404	28	19	70	43	30	39	100	44	19	12
Algorta	804	75	31	158	65	62	52	201	73	76	11
Men	433	37	19	79	40	32	28	112	38	41	7
Women	371	38	12	79	25	30	24	89	35	35	4

Location and Sex	Total	0 a 3	4 a 5	6 a 14	15 a 19	20 a 24	25 a 29	30 a 49	50 a 64	65 a 79	80 o más
	Population										
		Age groups									
Grecco	726	59	28	134	56	75	53	170	83	49	19
Men	412	27	16	62	33	49	32	105	53	27	8
Women	314	32	12	72	23	26	21	65	30	22	11
Paso de los Mellizos	317	25	9	73	30	23	17	75	37	25	3
Men	179	17	6	38	20	12	7	41	21	16	1
Women	138	8	3	35	10	11	10	34	16	9	2
Villa General Borges	316	34	11	67	23	20	27	86	27	14	7
Men	171	17	6	33	12	11	16	51	15	7	3
Women	145	17	5	34	11	9	11	35	12	7	4
Sarandí de Navarro	269	27	7	57	13	21	23	64	36	12	9
Men	147	13	3	31	8	12	13	35	20	7	5
Women	122	14	4	26	5	9	10	29	16	5	4
Bellaco	243	21	15	55	15	20	30	58	20	7	2
Men	116	11	7	22	4	10	15	32	12	3	-
Women	127	10	8	33	11	10	15	26	8	4	2
Los Arrayanes	221	26	11	33	15	13	17	59	33	12	2
Men	111	11	6	19	3	8	7	31	18	6	2
Women	110	15	5	14	12	5	10	28	15	6	-
Villa María	199	23	6	39	18	14	17	46	17	13	6
Men	104	11	4	18	7	9	7	26	12	6	4
Women	95	12	2	21	11	5	10	20	5	7	2
Menafra	126	7	3	12	9	12	14	51	7	9	2
Men	94	4	3	3	7	11	13	41	6	6	-
Women	32	3	-	9	2	1	1	10	1	3	2
Tres Quintas	100	12	10	17	3	12	14	21	8	3	-
Men	50	5	5	10	-	6	7	11	3	3	-
Women	50	7	5	7	3	6	7	10	5	-	-
Las Cañas	80	8	2	8	3	7	4	27	18	3	-
Men	45	4	1	6	1	4	1	14	11	3	-
Women	35	4	1	2	2	3	3	13	7	-	-
Merinos	16	-	1	4	1	2	-	3	2	2	1
Men	7	-	-	1	-	2	-	2	1	1	-

Location and Sex	Total	0 a 3	4 a 5	6 a 14	15 a 19	20 a 24	25 a 29	30 a 49	50 a 64	65 a 79	80 o más
	Population										
		Age groups									
Women	9	-	1	3	1	-	-	1	1	1	1
Rural	6.755	400	236	967	474	472	518	1.955	1.140	504	89
Men	4.144	199	128	507	282	314	321	1.221	777	343	52
Women	2.611	201	108	460	192	158	197	734	363	161	37

Source : NATIONAL INSTITUTE OF STATISTICS - CENSUS PHASE I 2004

Table 12
SORIANO: Population per Age groups, according to Location and Sex.

Location and Sex	Total	0 a 3	4 a 5	6 a 14	15 a 19	20 a 24	25 a 29	30 a 49	50 a 64	65 a 79	80 o más
	Population										
		Age groups									
TOTAL	84.563	5.449	2.960	13.537	7.159	6.335	5.819	19.766	12.231	8.608	2.699
Men	41.932	2.748	1.527	6.831	3.607	3.236	3.017	9.849	6.129	3.983	1.005
Women	42.631	2.701	1.433	6.706	3.552	3.099	2.802	9.917	6.102	4.625	1.694
Mercedes	42.032	2.867	1.524	6.644	3.575	3.257	2.991	9.572	6.114	4.149	1.339
Men	20.503	1.447	770	3.358	1.831	1.642	1.542	4.639	2.959	1.821	494
Women	21.529	1.420	754	3.286	1.744	1.615	1.449	4.933	3.155	2.328	845
Dolores	15.753	928	528	2.515	1.395	1.224	1.041	3.730	2.169	1.668	555
Men	7.595	458	266	1.247	675	615	551	1.835	1.051	709	188
Women	8.158	470	262	1.268	720	609	490	1.895	1.118	959	367
Cardona	4.689	247	124	689	349	318	283	1.077	688	645	269
Men	2.202	122	76	320	180	173	141	510	315	278	87
Women	2.487	125	48	369	169	145	142	567	373	367	182
Chacras de Dolores	3.251	263	160	667	313	290	269	743	325	178	43
Men	1.681	134	82	340	170	153	122	388	173	96	23
Women	1.570	129	78	327	143	137	147	355	152	82	20
José Enrique Rodó	2.113	105	54	326	184	143	126	497	316	278	84
Men	1.014	56	23	154	81	69	68	255	143	134	31
Women	1.099	49	31	172	103	74	58	242	173	144	53
Palmitas	1.954	131	75	294	173	146	139	446	269	216	65
Men	993	70	41	147	90	78	79	212	144	107	25
Women	961	61	34	147	83	68	60	234	125	109	40

Location and Sex	Population										
	Total	Age groups									
		0 a 3	4 a 5	6 a 14	15 a 19	20 a 24	25 a 29	30 a 49	50 a 64	65 a 79	80 o más
Villa de Soriano	1.184	79	41	182	109	81	98	258	164	138	34
Men	602	41	17	96	54	36	60	136	87	62	13
Women	582	38	24	86	55	45	38	122	77	76	21
Santa Catalina	1.053	55	30	166	78	57	68	245	167	150	37
Men	527	24	16	82	45	30	35	128	84	71	12
Women	526	31	14	84	33	27	33	117	83	79	25
Egaña	852	80	36	138	79	57	62	184	105	86	25
Men	437	41	20	75	38	29	31	95	52	45	11
Women	415	39	16	63	41	28	31	89	53	41	14
Risso	666	40	27	117	51	32	42	179	83	80	15
Men	341	19	17	52	21	15	22	97	50	39	9
Women	325	21	10	65	30	17	20	82	33	41	6
Villa Darwin	582	56	30	104	46	49	48	112	79	42	16
Men	308	28	20	51	18	22	25	61	49	27	7
Women	274	28	10	53	28	27	23	51	30	15	9
Palmar	471	22	11	95	52	41	25	134	84	4	3
Men	239	11	6	52	27	19	13	61	49	1	-
Women	232	11	5	43	25	22	12	73	35	3	3
Cañada Nieto	454	29	14	83	24	31	20	111	68	55	19
Men	234	15	9	41	11	16	9	62	39	23	9
Women	220	14	5	42	13	15	11	49	29	32	10
Agraciada	389	16	17	62	18	16	23	98	60	62	17
Men	182	6	9	35	2	7	12	50	30	26	5
Women	207	10	8	27	16	9	11	48	30	36	12
Palo Solo	211	12	7	32	19	19	14	54	36	16	2
Men	111	9	2	13	10	11	6	32	19	8	1
Women	100	3	5	19	9	8	8	22	17	8	1
Pueblo Castillos	163	13	7	30	18	14	9	41	20	8	3
Men	85	8	5	16	6	8	3	23	11	5	-
Women	78	5	2	14	12	6	6	18	9	3	3
Perseverano	141	11	3	44	12	11	12	39	8	1	-
Men	72	6	3	21	6	4	6	21	4	1	-
Women	69	5	-	23	6	7	6	18	4	-	-

Location and Sex	Population										
	Total	Age groups									
		0 a 3	4 a 5	6 a 14	15 a 19	20 a 24	25 a 29	30 a 49	50 a 64	65 a 79	80 o más
La Loma	111	2	2	15	6	4	3	23	31	17	8
Men	64	2	-	9	4	3	-	11	21	8	6
Women	47	-	2	6	2	1	3	12	10	9	2
El Tala	93	13	4	19	7	8	7	25	3	7	-
Men	47	6	2	8	3	3	2	15	2	6	-
Women	46	7	2	11	4	5	5	10	1	1	-
La Concordia	79	6	4	16	9	4	5	19	13	2	1
Men	38	3	1	9	3	2	2	9	8	1	-
Women	41	3	3	7	6	2	3	10	5	1	1
Colonia Concordia	55	2	-	15	7	6	1	16	8	-	-
Men	26	2	-	6	2	3	-	8	5	-	-
Women	29	-	-	9	5	3	1	8	3	-	-
Rural	8.267	472	262	1.284	635	527	533	2.163	1.421	806	164
Men	4.631	240	142	699	330	298	288	1.201	834	515	84
Women	3.636	232	120	585	305	229	245	962	587	291	80

Source : NATIONAL INSTITUTE OF STATISTICS - CENSUS PHASE I 2004

1.1.3 SOCIAL DEVELOPMENT

Table 13

IDH[3] BY DEPARTMENT. 1991-2002.

Year	Paysandú	Río Negro	Soriano
1991	0,793	0,802	0,792
1992	0,8	0,805	0,8
1993	0,803	0,805	0,8
1994	0,812	0,813	0,811
1995	0,814	0,815	0,813
1996	0,817	0,818	0,818
1997	0,82	0,822	0,818
1998	0,825	0,822	0,825
1999	0,825	0,823	0,824
2000	0,83	0,829	0,83
2001	0,831	0,832	0,818
2002	**0,831**	**0,837**	**0,835**

Source: PNUD, Human Development in Uruguay 2005

[3] IDH: Life expectancy, Literacy rate, Gross rate of combined registration, PBI per cápita (PPA in USD).

Table 14
Infant Mortality

	Birth	Death of infants less than 1 year	infant mortality Rate
Paysandú	2.047	28	13,6 0/00
Río Negro	918	18	19,6 0/00
Soriano	1.417	25	17,6 0/00

Source: INE based on Ministry of Public Health 200

Table 15
Life expectancy at birth. Total of the country, evolution 1991-2002

Year	Paysandú	Río Negro	Soriano
1991	72,6	72,7	72
1992	72,8	72,8	72,2
1993	73	73	72,3
1994	73,1	73,2	72,5
1995	73,3	73,3	72,7
1996	73,5	73,5	72,8
1997	73,6	73,7	73
1998	73,8	73,8	73,2
1999	74	74	73,3
2000	74,1	74,1	73,5
2001	74,3	74,3	73,7
2002	74,5	74,5	73,9

Source: PNUD, Human Development in Uruguay 2005

Table 16

Life expectance at birth, by sex and department. 2004

	Total	Men	Women
Total of the Country	75,38	71,50	79,41
Paysandú	75,89	72,64	79,27
Río Negro	75,97	72,52	79,56
Soriano	75,36	71,78	79,09

Source: INE, Uruguay in numbers 2005

1.1.3.1 Homes Income

Table 17
Gini Index of income concentration per cápita with location value by department (urban country). 2002

Department	Gini Index
Paysandú	0,4148
Río Negro	0,3837
Soriano	0,4301
Total country	0,4507

Source: PNUD, Human Development in Uruguay 2005

Table 18
Descriptive measures of monthly income (in Uruguayan pesos) of the homes, per department. Year 2004

	Incomes without location value				Incomes with location value			
	Media	Mediana	Upper limit of the poorest 20%	Lower limit of the richest 20%	Media	Mediana	Upper limit of the poorest 20%	Lower Limit of the richest 20%
Total	14071	10000	5279	19296	16415	11915	6800	22133
Montevideo	17093	12166	6297	23671	19959	14449	8000	27000
Paysandú	11178	8842	4785	15000	12989	10465	6223	17333
Río Negro	9280	7422	4700	12602	11127	9232	6500	14722
Soriano	12666	8395	4500	16566	14576	10218	6000	18080

Source: ECH 2004

1.1.3.1 Poverty Incidence in Homes

Table 19
Poverty Index[4] per department. 1991-2002

Year	Paysandú	Río Negro	Soriano
1991	17,1	20	21,7
1992	18	18,1	12,6
1993	17,7	24	20,7
1994	14,9	22,8	16
1995	17,4	22	14,2
1996	20	26,7	16,7
1997	19,3	22,3	17,4
1998	22,9	14,9	21,4
1999	21,2	16	21,2
2000	23,5	23,9	24,2
2001	24,1	22,7	25,6
2002	24,1	16,6	23,7

Source: PNUD, Human Development in Uruguay 2005

Table 20
Population in irregular settlements, according to sex and epartment. 2004.

	Sex							
	No data		Men		Women		Total	
Locality	*Cases*	*%*	*Cases*	*%*	*Cases*	*%*	*Cases*	*%*
Paysandú	45	0,04	1797	1,59	1697	1,50	3539	3,13
Río Negro	10	0,02	434	0,80	430	0,80	874	1,62
Soriano	35	0,08	1443	3,43	1372	3,26	2850	6,78

Source : NATIONAL INSTITUTE OF STATISTICS - CENSUS PHASE I 2004
Note: This shows only the locations registering homes in irregular settlements.

Table 21
Population en irregular settlements, according to sex by department. 2004.

Locality Sex

[4] IPH departamental: Probability of no living up to 60 years, poverty incidence with LP (relative, 1996, 2002) % de adults older than 15 years that did not attend the educational system, unemployment rate (long term, open).

	No data		Men		Women	
Paysandú	*Cases*	*% total Population*	*Cases*	*% total Population*	*Cases*	*% total Population*
Nuevo Paysandú	22	0,29	526	7,04	536	7,18
Paysandú	20	0,03	1265	1,73	1158	1,58
Puntas de Arroyo Negro	3	5,77	6	11,54	3	5,77
TOTAL	45	0,04	1797	1,59	1697	1,50
Río Negro	*Casos*	*% total Population*	*Casos*	*% total Population*	*Casos*	*% total Population*
Barrio Anglo	7	0,86	414	50,61	404	49,39
San Javier	3	0,18	20	1,19	26	1,55
Total	10	0,02	434	0,80	430	0,80
Soriano	*Casos*	*% total Population*	*Casos*	*% total Population*	*Casos*	*% total Population*
Mercedes	35	0,08	1443	3,43	1372	3,26

Source : NATIONAL INSTITUTE OF STATISTICS - CENSUS PHASE I 2004

Note: This shown only the locations registering homes in irregular settlements.

1.1.4 EDUCATION

Table 22

Specific estimate of the percentage of the Population 14 or older by maximum level of instruction reached, by departments. Year 2004

	No Education	Primary Incomplete	Primary complete	Secondary 1er Cycle	Secondary 2do Cycle	Technical	Teacher or Professor	Universidad similar
Paysandú	0,9	13,6	22,2	18,2	21,1	12,4	3,7	8,0
Río Negro	1,5	10,0	27,0	34,3	15,8	4,8	4,8	1,7
Soriano	2,3	15,2	17,8	17,8	24,0	12,5	4,3	6,1

Table 23
Schools and primary level students of the educational system. Year 2003

	Total		Initial Educ.		CommonEduc.		Special Educ.		Musical Ed.
	Sch.	Students	First Grades	Students	SCh.	Students	Sch.	Students	Schools
Total country	2370	411289	173	90151	2093	312832	80	8306	15
Paysandú	110	17420	4	3745	104	13395	2	280	0
Río Negro	70	8580	4	1889	63	6499	2	192	1
Soriano	114	12577	6	2878	105	9358	3	341	0

Source: ANEP

Table 24
Number of liceums by administrative form, according to department. 2003

	Total	Public	Private
Paysandú.	19	14	5
Río Negro	11	8	3
Soriano.	14	13	1

Source: MEC, Anuario Estadístico 2003

Table 25
Students registered in the first to fourth year of secondary, by department. Año 2003.

	Groups	Students	Students by group
Paysandú.	173	5739	33.17
Río Negro	99	3165	31.97
Soriano	142	4490	31.62

Source: MEC, Anuario Estadístico 2003.

Table 26
Students registered in bachillerato (5to and 6to secondary year), public liceums. 2003

	Groups	Students	Students by group
Paysandú	33	310	9,4
Río Negro	22	863	39
Soriano	36	1260	35

Source: MEC, Anuario Estadístico 2003.

Table 27
Students registered in first through fourth grade in private schools. 2003

	Groups	Students	Students by group
Paysandú	27	513	19
Río Negro	7	99	14
Soriano	7	201	29

Source: MEC, Anuario Estadístico 2003.

Table 28
Students registered in Technical-Professional education, by department. 2003.

	Total
Paysandú	2.583
Río Negro	1.481
Soriano	3.088

Source: MEC, Anuario Estadístico 2003.

Table 29
Education infrastructure in the city of Fray Bentos.

1. PUBLIC EDUCATION		
PRIMARY		
Urban schools	17	Most schools have their capacity full
Rural schools	7	Tendency to emptiness
SECONDARY		
Liceums	2	
Amount of students	1345	Full capacity (more than 30 students per class)
Schools of technical professional education	2	Escuela Técnica de Fray Bentos and Escuela Agraria
Technical School		
Amount of students	917	
Basic Courses	Electricidad, Carpintería, Cocina, Panadería, Tejido, Belleza, Pintura de Obra	
Second cycle courses	Secretariado, Mecánica General, Carpintería and Electrotecnia	
Technological Bachilleratos	Electromecánica, Diseño, Administración and Tecnología de Construcción	
Maximum Capacity	2500	
Agriculture School		
Amount of students	64	Almost full capacity (65 seats). Ofrece también cursos cortos. Existe demanda de cursos de forestación
TERTIARY		
Institute fo Form Teachers	1	Magisterio o Profesorado
Students	473	
2. PRIVATE EDUCATION		
Escuela primaria	1	Colegio parroquial

Cantidad de alumnos	105	
Colegio con educación primaria and secundaria hasta cuarto año	1	
Cantidad de alumnos	157	
Capacidad máxima	300	

1.1.5 WORK

Table 30

PEA. Activity condition of the Population 14 years or more, according to department.

	Condición	%
Paysandú	Activos	59.40
	Inactivos	40.60
	Total	100.00
Río Negro	Activos	44.05
	Inactivos	55.95
	Total	100.00
Soriano	Activos	59.13
	Inactivos	40.87
	Total	100.00
Toda el área	Activos	55.77
	Inactivos	44.23
	Total	100.00

Fuente: INE, ECH 2004

Table 31

Composition of the PEA in the three departments of the area of influence

	Río Negro	Soriano	Paysandú
Working	96,6	83,1	83,8
Not Working B.T.1.V	2,7	4,2	5,0
Desocupados propiamente dichos	,8	12,5	11,0
Desocupados en seguro de paro		,2	,2
Total	100,0	100,0	100,0

Fuente: INE 2004

Table 32

Specific estimate of the unemployment rate by components, per departments. Year 2004

	Looking for a Job for the 1st time	Unemployed with strike insurance	Sex		Age		Head of the home	
			Men	Women	Less than 25	25 and more years	Head	Another Member
Paysandú	5,1	11,2	6,3	10,0	8,6	7,7	1,8	14,4
Río Negro	2,8	0,8	2,7	0,8	1,9	1,6	-.-	3,5
Soriano	4,2	12,7	6,5	10,5	7,2	9,8	2,8	14,1

Fuente: INE

Table 33

Specific estimate of the specific rate of unemployment by age group, by department. Year 2004

	Total	14 a 19	20 a 29	30 a 39	40 a 49	50 a 59	60 and more
Paysandú	16,2	46,2	26,7	13,0	7,9	9,9	2,3
Río Negro	3,5	10,8	14,5	1,8	-.-	-.-	-.-
Soriano	16,9	42,5	29,6	13,1	10,0	7,3	12,8

Fuente: INE

Table 34
Specific estimate of the specific rate of activity of the urban population per group age, by departments. Año 2004

	Total	14 a 19	20 a 29	30 a 39	40 a 49	50 a 59	60 and more
Paysandú	59,4	33,3	78,9	87,3	80,0	71,4	18,2
Río Negro	43,7	11,8	50,1	73,1	71,1	56,1	17,2
Soriano	59,0	37,9	78,9	82,4	87,0	75,6	20,3

Fuente: INE

Table 35
Specific estimate of the specific rate of activity of the masculine urban population by age groups, by departments. Año 2004

	Total	14 a 19	20 a 29	30 a 39	40 a 49	50 a 59	60 and más
Paysandú	71,5	39,0	89,4	97,3	95,8	94,3	26,6
Río Negro	60,8	17,2	75,3	94,8	95,4	76,2	27,4
Soriano	69,6	45,8	87,6	89,9	100,0	92,1	29,0

Fuente: INE

Table 36
Specific estimate on the specific rate of activity of the urban female population per group age, by departments. Año 2004

	Total	14 a 19	20 a 29	30 a 39	40 a 49	50 a 59	60 and más
Paysandú	48,3	27,0	68,1	78,3	63,4	55,5	11,3
Río Negro	28,9	6,6	33,4	49,6	52,3	36,3	8,7
Soriano	49,8	29,2	68,3	75,9	77,1	63,0	13,5

Fuente: INE

Table 37
Specific estimate of the percentage of the working population by age group, by departments. Year 2004.

	Total	14 a 19	20 a 29	30 a 39	40 a 49	50 a 59	60 and más
Paysandú	100,0	5,1	19,5	21,9	25,5	20,1	7,8
Río Negro	100,0	3,6	16,4	22,5	25,9	21,4	10,2
Soriano	100,0	6,0	17,0	17,6	26,1	23,7	9,6

Fuente: INE

Table 38
Specific estimate of the specific rate of working urban population by age groups, by departments. Year 2004

	Total	14 a 19	20 a 29	30 a 39	40 a 49	50 a 59	60 and más
Paysandú	49,8	17,9	57,8	76,0	73,6	64,3	17,8
Río Negro	42,1	10,5	42,8	71,7	71,1	56,1	17,2
Soriano	49,0	21,8	55,6	71,6	78,3	70,1	17,7

Fuente: INE

Table 39
Specific estimate of the urban working population by occupation, by departments. Year 2004

	Total	Employee or private worker	Employee or public worker	Chief	Independent with an office	Indepen- with office	Worker w/o remuneration
Paysandú	100,0	54,4	17,7	3,1	13,1	10,2	1,5
Río Negro	100,0	35,9	21,4	2,3	19,3	19,5	1,6
Soriano	100,0	47,4	17,6	4,9	9,0	19,1	2,0

Fuente: INE

Table 40
Specific estimate of the percentage of the urban working population by activity, by departments. Year 2004

	Total	A-B-C	D-E-F	G-H-I-J-K-L-M-N-O-P-Q
Paysandú	100,0	9,3	23,6	67,1
Río Negro	100,0	12,4	19,4	68,2
Soriano	100,0	9,7	18,3	71,9

Activity sectors: Uniform International Industrial Classification (CIIU) Revisio 3, adopted by Uruguay

A: Agriculture, Cattle, Hunting, and silvicutre
B: Fishery
C: Minery and quarries exploitation
D: Manufacturing Industries
E: Electricity, Gas, and Water Supply
F: Construction
G: Wholesale and retail commerce; automotive vehicle repairs, motorcycles, personal effects, and domestic effects.
H: Hotels and Restaurants
I : Transportation, Storage and Communications
J: Financial
K: Real Estate, Enterprises and Rent

L: Public Administration and Defense; Plans of social security of mandatory affiliation
M: Teaching
N: Social and Health Services
O: Waste, sewage disposal, sanitation and similar activities
P: Private Homes with Domestic Service
Q: Organizations and Extraterritorial Organisms

1.1.6. HEALTH

Table 41
Cases HIV positive and AIDS by department. Year 2004

Departamento	VIH		SIDA	
	Casos	Tasa cada 100.000 hab.	Casos	Tasa cada 100.000 hab.
Paysandú	53	47,5	18	16,1
Río Negro	37	71,6	18	34,8
Soriano	53	65	22	27
Total país	6109	193,1	2687	84,9

Fuente: Ministerio de Salud Pública

Table 42
Suicide rate by department. 2003

Departamento	Consumados	Tentativas
Paysandú	13	63
Río Negro	28	59
Soriano	23	58

Fuente: Ministerio del Interior. Anuario Estadístico sobre Violencia and Criminalidad 2003
Nota: Tasas cada 100.000 habitantes

Table 43
Rate of traffic accidents by department. 2003

	Type of accidents			
Departamento	Total	Light	Graves	Fatals
Paysandú	891	725	157	9
Río Negro	570	518	41	11
Soriano	415	378	31	6

Fuente: Ministerio del Interior. Anuario Estadístico sobre Violencia and Criminalidad 2003
Nota: Tasas cada 100.000 habitantes

Table 44
Rate of labor accidents by department. 2003

	Type of accidents			
Departamento	Total	Light	Graves	Fatales
Paysandú	32	23	8	1
Río Negro	26	22	4	0
Soriano	19	8	11	0

Fuente: Ministerio del Interior. Anuario Estadístico sobre Violencia and Criminalidad 2003
Note: Tasas cada 100.000 habitantes

Table 45– Health Services in Fray Bentos

1. PRIVATE HEALTH		
SANATORIUMS		
Amount	1	Without CTI complex. With an Intensive Care Unit, with two beds.
Associated services	2	Polyclinic for outpatients and movil emergency polyclinic
Affiliates (by June 2005)	6500	
Maximum capacity	8000	
Amount of doctors	54	

Beds available	26	
Specialties	All except neurosurgery	
POLICLÍNICAS PRIVADAS		
Amount	1	Primary health care, outpatient
Affiliates	1200	
Doctors	26	
Specialties	18	
2. PUBLIC HEALTH		
HOSPITALS		
Amount	1	Hospital de Fray Bentos. No dispone de CTI
Associated services	1	Health Center of the MPH Care to pregnant women and children up to 5 years
Móvils for emergency	3	2 in uso, 1 being repaired
Affiliates	18983	
Maximum Capacity	25000	
Amount of Doctors	56	
Beds available	70	
specialties	All except neurosurgery and cardiovascular surgery	
Percentage of occupation in 2004	53	
POLICLÍNICS		
Amount	3	In agreement with IMRN Plan to install one more (in Barrio Unión)
Services offered	General Medicine, infirmary, psychological attention.	

Fuente: Línea Base social de la empresa Botnia

1.1.7 PUBLIC SAFETY

Table 46
Rate Of crime by department. 2003

	Against property		Against people		
Department	Larceny	Pillage	Lesiones	Homicides	Sexual
Paysandú	20	6	23	3	11
Río Negro	31	1	45	4	22
Soriano	26	0	46	6	24

Fuente: Ministerio del Interior. Anuario Estadístico sobre Violencia and Criminalidad 2003. Nota: Hurtos cada 1.000 habitantes. Rapiñas and lesiones cada 10.000 habitantes. Homicidios and sexuales cada 100.000 habitantes

1.1.8. AGRICULTURAL ACTIVITY

Table 47
Number of exploitations by main source of income, by department

Main Source of income		Department Number of exploitations					
		Paysandú		Río Negro		Soriano	
		%	Número	%	Número	%	Número
Fruticultura		1,8	44	0,9	12	0,4	8
Viticultura		0,5	13		-	0,1	3
Horticultura		4,7	114	2,8	38	3,5	76
Cultivos cerealeros e ind.	Arroz	0,1	3	0,1	2		-
	Otros	4,0	95	6,8	93	8,1	179
Vac. Of milkeche		10,2	245	15,3	208	17,4	382
Vac. de meta		48,7	1.170	53,0	722	56,4	1.240
Ovinos (meta and wool)		10,4	249	4,7	64	3,5	76
Forestry		2,1	51	2,6	35	1,1	25
Viveros and plantines		0,2	6	0,1	2	0,1	3
Pigs		2,4	57	3,2	43	2,4	53
Birds		1,8	44	1,0	13	1,9	42
Machinery services		0,6	15	0,9	12	1,0	21
Other 1/		1,3	31	2,9	40	1,7	38
Expl. No comerciales 2/		11,0	265	5,7	77	2,3	51
Total		100,0	2.402	100,0	1.361	100,0	2.197

1/ Includes all activities not included in the previous concepts.

2/ Include the exploitations whose activities do not generate income, production destined exclusively to self consumption.

Fuente: Censo General Agropecuario 2000. MGAP

Table 48
Area exploited to use the land, by department. 2000

Use of the land		Department Area exploited (Hectares)					
		Paysandú		Río Negro		Soriano	
		%	Número	%	Número	%	Número
Forests	Naturales	4,0	54.073	3,6	33.807	5,0	41.554
	Artificiales	6,8	91.448	7,4	70.523	2,5	20.691
Cítrics		0,7	8.960	0,0	321	0,0	105
Otros frutales		0,0	296	0,0	88	0,0	17
Viñedos		0,0	181	0,0	2	0,0	15
Cultivos de huerta		0,0	453	0,1	498	0,0	376
Cultivos cer. e indust.		4,2	56.069	8,4	79.868	16,8	139.844
Cultivos forrajeros anuales		2,6	35.406	4,5	42.192	7,3	61.015
Tierra arada		1,2	16.024	1,3	12.522	2,5	20.761
Tierras de rastrojo		1,0	13.149	1,5	14.566	1,7	14.245
Praderas artificiales		5,9	79.085	11,7	110.367	18,6	154.786
Siembras en cobertura		0,7	9.842	1,2	11.219	1,5	12.107
Campo nat. Fertilizado		0,8	10.191	1,2	11.075	2,9	24.196
Campo natural		71,2	957.971	58,3	552.242	40,2	335.098

Use of the land	Department					
	Area exploited (Hectares)					
	Paysandú		Río Negro		Soriano	
	%	Número	%	Número	%	Número
Tierras improductivas	0,9	11.491	0,8	7.765	1,1	8.879
Total	100,0	1.344.639	100,0	947.055	100,0	833.689

Fuente: Censo General Agropecuario 2000. MGAP

Table 49
Number of exploitations by size of exploitation, by department. 2000

Size of the exploitation (ha)	Department					
	Paysandú		Río Negro		Soriano	
	Area exploited (ha)	Number of exploitations	Area explotada (ha)	Número de explotaciones	Superficie explotada (ha)	Número de explotaciones
De 1 a 4	635	257	217	97	372	135
De 5 a 9	1.768	257	477	76	1.130	176
De 10 a 19	3.096	214	975	72	2.923	213
De 20 a 49	7.810	236	5.332	163	10.529	326
De 50 a 99	13.708	189	13.758	187	21.129	293
De 100 a 199	34.799	246	28.046	196	39.562	280
De 200 a 499	125.725	386	54.970	165	109.580	340
De 500 a 999	170.234	241	106.360	149	157.762	219
De 1000 a 2499	393.095	253	271.112	171	247.642	163
De 2500 a 4999	298.531	90	188.815	55	133.620	39
De 5000 a 9499	163.954	25	177.958	26	70.760	11
10000 and más	131.284	8	99.035	4	38.680	2
Total	1344639	2.402	947.055	1.361	833.689	2.197
Fuente: Censo General Agropecuario 2000. MGAP						

Table 50
Number and evolution of the hectares planted.
Includes areas effectively forested and areas affected by forestation

Departamento	1975-1980	1981-1985	1985-1990	1991-1995	1996-2000	2001-2003	Total
Paysandú	1.928	2.714	3.757	21.720	48.845	12.523	91.487
Río Negro	1.537	550	3.082	48.554	30.991	2.460	87.174
Soriano	64	0	336	13.009	9.434	2.002	24.845
Total	10.977	8.384	19.789	183.504	345.877	76.799	645.330
Total acumulado	10.977	19.361	39.150	222.654	568.531	645.330	

Fuente: Sociedad de Productores Forestales del Uruguay

Table 51
Number of jobs generated by forestry. Evolution and Projection. (Bianual average)

STAGE	1989-1990	1991-1992	1993-1994	1995-1996	1997-1998	1999-2000	2001-2002	2003	Projected to 2010
Vivero Plantación Manejo Cosecha	9%	25%	46%	56%	67%	67%	66%	69%	62%
Transporte and Logística					0.70%	2.45%	4.40%	5.30%	9%
Industria	91%	75%	54%	43%	32%	29%	28%	24%	28%
Exportación					0.30%	1.00%	1.10%	1.30%	1%
TOTAL	**4049**	**4515**	**5446**	**5949**	**7185**	**9127**	**9837**	**10.011**	**19.019**

Fuente: Sociedad de Productores Forestales del Uruguay

1.1.9 DESCRIPCIÓN DE GRUPOS ESPECÍFICOS VINCULADOS AL USO DE LOS RECURSOS NATURALES COMO FUENTE DE SUBSISTENCIA

TOURISM

Table 52

Afluencia de turistas al “litoral termal” según destino principal and período

Destino elegido	Enero – Marzo/04	Abril - Junio/04	Jul - Set/04
Termas de Guaviyú - Paysandú	**4.894**	**2.771**	**192**
Paysandú	**12.640**	**4.344**	**370**
Fray Bentos, Las Cañas	**29.517**	**7.430**	**529**
Mercedes	**7.285**	**3.111**	**192**
Termas Del Arapey	6.697	5.648	304
Termas Del Damián	19.403	11.751	914
Otras Zonas	940	1.019	192
TOTAL	**81.376**	**36.074**	**47.464**

Fuente: Ministerio de Turismo and Deporte

APICULTURA

Table 53
Número de explotaciones con colmenas and número de colmenas propias and de terceros, según departamento.

Departamento	N° de explotaciones con colmena	Número de colmenas		
		Total	Propias	De terceros
Paysandú	602	31.573	5.990	25.583
Río Negro	496	35.004	4.210	30.794
Soriano	934	72.257	7.855	64.402

Fuente: Censo General Agropecuario 2000. MGAP

Table 54
Número de apicultores por departamento, según año

Departamento	2001	2003
Paysandú	307	400
Río Negro	200	416
Soriano	598	599
Total del país	2534	4236

Fuente: JUNAGRA, Registro Nacional de Propietarios de Colmenas

Table 55

Beehives by square kilometer (each 100 has.) Year 2003

Department	Beehives
Paysandú	3,3
Río Negro	4,3
Soriano	10, 4
Total país	2,4

Fuente: JUNAGRA, Registro Nacional de Propietarios de Colmenas

Table 56
Number of apiarists and beehives by departament by police section, to june 30 2001.

PAYSANDU	Nº Col.	Api.
Sec. Pol. 45ª	764	10
Sec. Pol. 1ª	50	2
Sec. Pol. 2ª	50	2
Sec. Pol. 3ª	1054	18
Sec. Pol. 4ª	6090	68
Sec. Pol. 5ª	7895	68
Sec. Pol. 6ª	6212	57
Sec. Pol. 7ª	1023	15
Sec. Pol. 8ª	2493	24
Sec. Pol. 9ª	151	2
Sec. Pol. 10ª	35	1
Sec. Pol. 11ª	120	2
Sec. Pol. 12ª	1264	9
Sec. Pol. 13ª	3425	27
Sec. Pol. 14ª	286	2
Total	30912	307

RIO NEGRO	Nº Col.	Api.
Sec. Pol. 45ª	390	3
Sec. Pol. 2ª	110	1
Sec. Pol. 3ª	2649	14
Sec. Pol. 4ª	499	5
Sec. Pol. 5ª	1738	16
Sec. Pol. 6ª	5661	46
Sec. Pol. 7ª	3252	33
Sec. Pol. 8ª	40	1
Sec. Pol. 9ª	282	5
Sec. Pol. 10ª	1338	15
Sec. Pol. 11ª	1791	24
Sec. Pol. 12ª	3293	34
Sec. Pol. 13ª	151	3
Total	21194	200

SORIANO	Nº Col.	Api.
Sec. Pol. 45ª	2826	17
Sec. Pol. 1ª	10	1
Sec. Pol. 2ª	20	1
Sec. Pol. 3ª	10410	109
Sec. Pol. 4ª	10678	86
Sec. Pol. 5ª	4539	55
Sec. Pol. 6ª	8668	81
Sec. Pol. 7ª	12034	78
Sec. Pol. 8ª	3943	35
Sec. Pol. 9ª	6332	53
Sec. Pol. 10ª	3520	21
Sec. Pol. 11ª	33367	29
Sec. Pol. 12ª	3514	28
Sec. Pol. 13ª	200	1
Sec. Pol. 17ª	245	2
Sec. Pol. 19ª	42	1
Total	100348	598

Fuente: JUNAGRA, Registro Nacional de Propietarios de Colmenas

FISHERY

Table 57

Number of artisan fishermen on the Uruguay River, by department. 2005

Department	Nº fishermen
Paysandú	16
Río Negro (Fray Bentos, Nuevo Berlín and San Javier)	90
Soriano (Villa Soriano)	20
Fuente: Prefectura Naval de Fray Bentos, Paysandú and Mercedes	

DEPARTMENT OF GUALEGUAYCHÚ

1.2.1 SOCIO-DEMOGRAPHIC CHARACTERISTICS

Table 58
TOTAL POPULATION ACCORDING TO NATIONAL CENSUS BY DEPARTMENT YEARS 1914/ 2001

DEPARTMENTS	NATIONAL CENSUS						
	1914	1947	1960	1970	1980	1991	2001
TOTAL PROVINCIA	425.373	787.362	805.357	811.691	908.313	1.020.257	1.158.147
Gualeguaychú	46.505	83.500	83.796	80.880	91.658	89.726	101.350

FUENTE: INDEC - DEC de Entre Ríos, Censos Nacionales de Population.

Table 59
Population total, absolute growth and intercensal variation, by region. Period 1991-2001

Región	POPULATION PER CENSUS		ABSOLUTE GROWTH	VARIAC. INTERCENSAL (%)
	1991	2001		
Total Entre Ríos	**1.020.257**	**1.158.147**	**137.890**	**13,5**
Gualeguaychú	89.726	101.350	11.624	13

FUENTE: INDEC and DEC - Censos Nacionales de Population and Vivienda 1991 and 2001.

Table 60
Population by sex. Year 2001

Region	POPULATION					MASCULINE INDEX
	TOTAL	MEN		WOMEN		
		Casos	%	Casos	%	
TOTAL PROVINCE	1.158.147	568.275	49,1	589.872	50,9	96,3
Gualeguaychú	101.350	49.642	49,0	51.708	51,0	96

(1) Información proporcionada por el Instituto Geográfico Militar.

FUENTE: INDEC - DEC de Entre Ríos, Censo Nacional de Population, Hogares and Viviendas 2001.

Table 61
Population, area, and density. Years 1991 – 2001

Region	Year					
	1991			2001		
	Population	Area in km^{2in}	Density inhab/km^2	Population	Area en km^2	Density inhab/km^2
Total country	32.615.528	3.745.247	8,7	36.260.130	3.745.249,9	9,7
Entre Ríos	1.020.257	78.781	13,0	1.158.147	78.781	14,7
Gualeguaychú	89.726	7.086	12,7	101.350	7.086	14,3

FUENTE: INDEC - DEC de Entre Ríos, Censo Nacional de Population, Hogares and Viviendas 2001.

Table 62
Urban and rural population, according to national census 1991-2001

Región	CENSOS NACIONALES									
	1991					2001				
	URBANA		RURAL		TOTAL	URBANA		RURAL		TOTAL
	Casos	%	Casos	%		Casos	%	Casos	%	
Total Entre Ríos	789.578	77,4	230.679	22,6	1.020.257	949.250	82,0	208.897	18,0	1.158.147
Gualeguaychú	76.119	84,8	13.607	15,2	89.726	87.584	86,4	13.766	13,6	101.350

FUENTE: INDEC - DEC - Censos Nacionales de Population de 1991 and 2001.

Table 63
Estimated Population residing in the Entre Rios province

2005	2010
1.154.618	1.189.938

FUENTE: INDEC, estimaciones al 30 de junio de cada año

Table 64
Department of Gualeguaychú. Amount of inhabitants by location, by sex, and by Year 2001.

Gualeguaychú	Total
Population Rural Dispersa	3685
Alarcón	272
Aldea San Juan	466
Costa Uruguay Norte	367
Cuchilla Redonda	281
Distrito Talitas	173
Enrique Carbo	902
Estación Escriña	189
Faustino M. Parera	409
General Almada	309
Irazusta	414
Las Mercedes	192
Pueblo General Belgrano	1503
Rincon Del Cinto	108
Rincón Del Gato	60
Aldea San Antonio – Gchu	1127
Gilbert	917
Gualeguaychú	76220
Larroque	5764
Urdinarrain	7992
	101350

Municipality or Junta de gobierno		Age groups	Total		
			Men	Women	TOTAL
Juntas de Gobierno	Alarcon	Total	153	119	272
		Less than 1	6	2	8
		1-4	15	9	24
		5-9	20	13	33
		10-14	17	18	35
		15-19	15	10	25
		20-29	19	15	34
		30-39	17	13	30
		40-49	15	14	29
		50-59	12	8	20
		60 and over	17	17	34
	Aldea San Juan	Total	248	218	466
		Less than 1	2	8	10
		1-4	21	27	48
		5-9	26	20	46
		10-14	21	10	31
		15-19	15	14	29
		20-29	34	28	62
		30-39	44	26	70
		40-49	25	18	43
		50-59	30	21	51
		60 and over	30	46	76
	Costa Uruguay Norte	Total	214	153	367
		Less than 1	3	3	6
		1-4	7	13	20
		5-9	15	15	30
		10-14	21	11	32
		15-19	20	9	29
		20-29	33	18	51
		30-39	24	20	44
		40-49	21	13	34
		50-59	31	22	53
		60 and over	39	29	68
	Cuchilla Redonda	Total	155	126	281
		Less than 1	3	1	4
		1-4	15	14	29
		5-9	13	10	23
		10-14	13	13	26
		15-19	12	11	23
		20-29	21	16	37
		30-39	20	10	30
		40-49	17	14	31
		50-59	25	18	43
		60 and over	16	19	35
	Distrito Talitas	Total	94	79	173

Municipality or Junta de gobierno		Age groups	Total		
			Men	Women	TOTAL
		Less than 1	.	1	1
		1-4	5	6	11
		5-9	9	6	15
		10-14	8	9	17
		15-19	7	7	14
		20-29	10	7	17
		30-39	11	6	17
		40-49	16	7	23
		50-59	14	13	27
		60 and over	14	17	31
	Enrique Carbo	Total	450	452	902
		Less than 1	9	9	18
		1-4	32	31	63
		5-9	42	43	85
		10-14	47	52	99
		15-19	50	34	84
		20-29	57	64	121
		30-39	47	46	93
		40-49	51	59	110
		50-59	51	46	97
		60 and over	64	68	132
	Estación Escriña	Total	113	76	189
		1-4	5	2	7
		5-9	11	3	14
		10-14	8	6	14
		15-19	8	1	9
		20-29	14	7	21
		30-39	11	9	20
		40-49	9	8	17
		50-59	9	11	20
		60 and over	38	29	67
	Faustino M. Parera	Total	212	197	409
		Less than 1	6	4	10
		1-4	9	13	22
		5-9	17	20	37
		10-14	24	12	36
		15-19	16	13	29
		20-29	27	26	53
		30-39	21	18	39
		40-49	28	22	50
		50-59	29	19	48
		60 and over	35	50	85
	General Almada	Total	155	154	309
		Less than 1	.	3	3
		1-4	15	7	22

Municipality or Junta de gobierno		Age groups	Total		
			Men	Women	TOTAL
		5-9	14	23	37
		10-14	15	17	32
		15-19	20	15	35
		20-29	22	17	39
		30-39	15	18	33
		40-49	23	17	40
		50-59	12	16	28
		60 and over	19	21	40
	Irazusta	Total	215	199	414
		Less than 1	5	4	9
		1-4	12	8	20
		5-9	15	15	30
		10-14	15	13	28
		15-19	14	21	35
		20-29	29	21	50
		30-39	21	17	38
		40-49	24	25	49
		50-59	32	24	56
		60 and over	48	51	99
	Las Mercedes	Total	108	84	192
		Less than 1	.	3	3
		1-4	4	7	11
		5-9	10	9	19
		10-14	14	5	19
		15-19	5	6	11
		20-29	8	7	15
		30-39	9	11	20
		40-49	14	8	22
		50-59	17	9	26
		60 and over	27	19	46
	Pueblo General Belgrano	Total	776	727	1503
		Menos de 1	11	17	28
		1-4	51	52	103
		5-9	73	65	138
		10-14	87	68	155
		15-19	67	68	135
		20-29	94	98	192
		30-39	112	112	224
		40-49	105	95	200
		50-59	76	82	158
		60 and más	100	70	170
	Rincón Del Cinto	Total	67	41	108
		Menos de 1	.	1	1
		1-4	3	4	7
		5-9	5	.	5

Municipality or Junta de gobierno		Age groups	Total		
			Men	Women	TOTAL
		10-14	4	3	7
		15-19	8	5	13
		20-29	12	6	18
		30-39	7	5	12
		40-49	9	6	15
		50-59	10	5	15
		60 and más	9	6	15
	Rincón Del Gato	Total	32	28	60
		1-4	1	2	3
		5-9	3	5	8
		10-14	1	3	4
		15-19	5	.	5
		20-29	7	4	11
		30-39	3	3	6
		40-49	4	1	5
		50-59	3	4	7
		60 and más	5	6	11
Municipios	Aldea San Antonio - Gchu	Total	573	554	1127
		Menos de 1	8	8	16
		1-4	34	33	67
		5-9	43	38	81
		10-14	53	43	96
		15-19	52	49	101
		20-29	88	69	157
		30-39	63	60	123
		40-49	65	61	126
		50-59	70	75	145
		60 and over	97	118	215
	Gilbert	Total	472	445	917
		Menos de 1	10	13	23
		1-4	39	34	73
		5-9	52	37	89
		10-14	56	40	96
		15-19	36	36	72
		20-29	61	53	114
		30-39	61	47	108
		40-49	36	40	76
		50-59	44	41	85
		60 and over	77	104	181
	Gualeguaychú	Total	36797	39423	76220
		Menos de 1	714	729	1443
		1-4	2838	2681	5519
		5-9	3488	3387	6875
		10-14	3644	3598	7242
		15-19	3466	3433	6899

Municipality or Junta de gobierno		Age groups	Total		
			Men	Women	TOTAL
		20-29	6035	6069	12104
		30-39	4695	5005	9700
		40-49	4425	4569	8994
		50-59	3576	3840	7416
		60 and over	3916	6112	10028
	Larroque	Total	2802	2962	5764
		Menos de 1	40	53	93
		1-4	196	219	415
		5-9	284	275	559
		10-14	275	307	582
		15-19	301	283	584
		20-29	448	438	886
		30-39	328	357	685
		40-49	333	348	681
		50-59	256	257	513
		60 and over	341	425	766
	Urdinarrain	Total	3942	4050	7992
		Menos de 1	63	55	118
		1-4	279	254	533
		5-9	374	338	712
		10-14	376	396	772
		15-19	392	309	701
		20-29	531	523	1054
		30-39	502	489	991
		40-49	427	406	833
		50-59	391	436	827
		60 and over	607	844	1451

Fuente: INDEC. Censo Nacional de Population, Hogares and Viviendas 2001.

1.1.3 SOCIAL DEVELOPMENT

Table 65
Human Development Index (IDH) 1996

Region	IDH
All country	0.826
Entre Ríos	0.801

Fuente: Programa Argentino de Desarrollo Humano (1999).

Table 66

Rate of infant mortality by place of occurrence, neonatal and post-neonatal by 1000 born alive. Year 1998/2003

Departments	AÑOS																	
	1998			1999			2000			2001			2002			2003		
	Total	Neon.	Posn.	Total	Neon.	Posn.	Total	Neon.	Posn.	Total	Neon.	Posn.	Total	Neon.	Posn.	Total	Neon.	Posn.
Total Entre Ríos	17,9	12,6	5,2	18,4	13,3	5,0	15,9	11,3	4,6	15,3	9,8	4,6	16,3	12,2	3,8	16,7	11,0	5,0
Gualeguaychú	18,6	16,2	2,4	22,2	16,0	6,2	15,1	11,3	3,9	13,9	9,3	3,1	11,2	9,0	1,6	15,3	8,6	6,6

FUENTE: Secretaría de Salud de Entre Ríos - Departamento de Bio Estadística.

Table 67
Life expectancy at birth

Region	Life expectancy at birth 1990-92 en años		
	Total	Male	Women
All the country	71.93	68.44	75.59
Entre Ríos	71.61	68.13	75.26

Table 68
RATES OF GENERAL MORTALITY Per 1000 INHABITANTS BY DEPARTMENTS OF RESIDENCE. YEARS 1998/2003

Region	GENERAL MORTALITY RATES(0/00)					
	1998	1999	2000	2001	2002	2003
Total Entre Ríos	8,2	8,2	7,7	7,6	7,3	7,7
Gualeguaychú	9,2	8,6	8,3	8,6	7,7	7,7

FUENTE: Secretaría de Salud - Departamento de Bio-Estadística.

Table 69
RATE OF NATALITY PER 1000 INHABITANTS BY DEPARTMENTS OF OCCURRENCE. YEARS 1998/2003

Region	GENERAL RATES OF NATALITY					
	1998	1999	2000	2001	2002	2003
Total Entre Ríos	21,2	21,1	21,5	19,7	18,8	20,3
Gualeguaychú	15,3	11,9	19,9	19,2	17,3	18,5

Source: Secretaría de Salud - Departamento de Bio-Estadística.

1.2.3.1 Incidence of poverty in homes

Table 70

TOTAL OF SPECIAL HOMES AND HOMES UIT UNSATISFIED BASIC NEEDS (NBI) IN 1980, 1991 and 2001 BY DEPARTMENTS

Region	TOTAL NO. OF HOMES AND HOMES WITH UNSATISFIED BASIC NEEDS (NBI)[5]								
	1980			1991			2001		
	TOTAL (1)	HOG. NBI	% (2)	TOTAL (1)	HOG. NBI	% (2)	TOTAL	HOG. NBI	% (2)
Total Entre Ríos	219.880	61.360	27,9	259.730	44.698	17,2	316.715	46.608	14,7
Gualeguaychú (3)	22.484	5.689	25,3	23.299	3.123	13,4	28.671	3.251	11,3

Source: I.N.D.E.C. - D.E.C Elaboración a partir de los Censos Nacionales de Population and Vivienda de 1980 and 1991.

Table 71

TOTAL POPULATION IN SPECIAL HOMES AND POPULATION IN HOMES UIT UNSATISFIED BASIC NEEDS IN 1980, 1991 AND 2001 BY DEPARTMENTS

Region	TOTAL POPULATION AND POPULATION IN HOMES UIT NBI								
	1980			1991			2001		
	TOTAL	POB. NBI	% (1)	TOTAL	POB. NBI	% (1)	TOTAL	POB. NBI	% (1)
Total Entre Ríos	892.900	292.979	32,8	1.009.940	207.956	20,6	1.149.418	202.578	17,6
Gualeguaychú	90.706	27.367	30,2	88.859	13.685	15,4	100.641	12.780	12,7

SOURCE: INDEC - DEC. Elaborado a partir de los Censos Nacionales de Population and Vivienda de 1980 ,1991 and 2001.

Table 72

Province of Entre Ríos by departments. Population in homes with presence of services in the segment. Year 2001

		Presence of service in the segment							
	Population in homes	Sewerage System(sewer)	Water System	Electricity	Gas	Public Lighting	Pavement	Public Transportation	Teléfono Público
Total provincial	1,146,846	762,984	1,031,882	1,088,519	295,170	967,983	637,695	762,218	685,385
%	100	67	90	95	26	84	56	66	60
Gualeguaychú	100,537	66,750	89,196	97,987	15,466	88,904	55,319	70,692	60,662
%	100	66	89	97	15	88	55	70	60

Fuente: INDEC. Censo Nacional de Population, Hogares and Viviendas 2001

[5] The indicators are defined as follows:
Overcrowding: Homes with more than three people per room. Housing: Homes in a precarious house or rent room. Sanitary conditions: Homes without letrines. School Attendance: Homes with at least one child of school age not attending school. Capacity of subsistence: Homes with four or more people per working member and, besides,, whose head of the house has a low education.

Table 73
Gualeguaychú Department. Population with NBI per department and municipality or junta de gobierno

Location	Total Population	Population with NBI	
		Cases	%
Rural Disperse Population	3685	475	12.89 %
Alarcón	272	64	23.52 %
Aldea San Antonio – Gchu	1115	65	5.82 %
Aldea San Juan	466	35	7.51 %
Costa Uruguay Norte	367	46	12.53 %
Cuchilla Redonda	281	54	19.21 %
Distrito Talitas	173	11	6.35 %
Enrique Carbo	902	199	22.06 %
Estación Escriña	189	18	9.52 %
Faustino M. Parera	401	84	20.94 %
General Almada	309	36	11.65 %
Gilbert	891	252	28.28 %
Gualeguaychú	75653	9611	12.70 %
Irazusta	414	83	20.04 %
Larroque	5738	604	10.52 %
Las Mercedes	192	32	16.66 %
Pueblo General Belgrano	1503	147	9.78 %
Rincón Del Cinto	108	20	18.51 %
Rincón Del Gato	60	9	15.00 %
Urdinarrain	7922	935	11.80 %

Source: INDEC. Censo Nacional de Population, Hogares and Viviendas 2001.

Table 74
Gualeguaychú. Homes with services present in the segment. Year 2001

Location	Homes	Services Present in the segment							
		Sewerage System		Water System		Electricity		Public Lighting	
		Cases	%	Cases	%	Cases	%	Cases	%
Total	28635	19246	67.2	25408	88.7	27874	97.3	25345	88.5
Population Rural Disperse	1107	48	4.3	26	2.3	799	72.2	0	0.0
Alarcón	70	0	0.0	0	0.0	57	81.4	0	0.0
Aldea San Juan	132	0	0.0	99	75.0	132	100.0	67	50.8
Costa Uruguay Norte	108	8	7.4	0	0.0	83	76.9	16	14.8
Cuchilla Redonda	75	11	14.7	21	28.0	75	100.0	14	18.7
Distrito Talitas	54	0	0.0	0	0.0	54	100.0	0	0.0
Enrique Carbo	268	0	0.0	224	83.6	259	96.6	204	76.1
Estación Escriña	62	0	0.0	40	64.5	53	85.5	12	19.4
Faustino M. Parera	122	0	0.0	98	80.3	122	100.0	43	35.2
General Almada	93	0	0.0	67	72.0	83	89.2	36	38.7
Irazusta	134	0	0.0	117	87.3	134	100.0	112	83.6

Location	Homes	Services Present in the segment							
		Sewerage System		Water System		Electricity		Public Lighting	
		Cases	%	Cases	%	Cases	%	Cases	%
Las Mercedes	58	0	0.0	32	55.2	24	41.4	17	29.3
Pueblo General Belgrano	458	0	0.0	436	95.2	457	99.8	394	86.0
Rincón Del Cinto	36	0	0.0	0	0.0	36	100.0	0	0.0
Rincón Del Gato	16	0	0.0	0	0.0	0	0.0	0	0.0
Aldea San Antonio – Gchu	337	245	72.7	306	90.8	337	100.0	245	72.7
Gilbert	286	49	17.1	263	92.0	239	83.6	212	74.1
Gualeguaychú	21239	15685	73.8	19825	93.3	20978	98.8	20279	95.5
Larroque	1578	1332	84.4	1575	99.8	1575	99.8	1513	95.9
Urdinarrain	2402	1868	77.8	2279	94.9	2377	99.0	2181	90.8

Source: INDEC. Censo Nacional de Population, Hogares and Viviendas 2001.

Table 75
Population in specific homes por Dpto., Municipality of Junta de gobierno by sanitary service of the home, and provision for drinking and cooking water. Año 2001.

Location	Population in specific homes	Sanitary Service			
		Toilets with flush water	%	Latrines or no toilet at all	%
Alarcón	272	172	63.2	100	36.8
Aldea San Juan	466	375	80.5	91	19.5
Costa Uruguay Norte	367	354	96.5	13	3.5
Cuchilla Redonda	281	232	82.6	49	17.4
Distrito Talitas	173	121	69.9	52	30.1
Enrique Carbo	902	692	76.7	210	23.3
Estación Escriña	189	159	84.1	30	15.9
Faustino M. Parera	401	277	69.1	124	30.9
General Almada	309	248	80.3	61	19.7
Irazusta	411	359	87.3	52	12.7
Las Mercedes	192	139	72.4	53	27.6
Pueblo General Belgrano	1501	1309	87.2	192	12.8
Rincón Del Cinto	108	106	98.1	2	1.9
Rincón Del Gato	60	54	90.0	6	10.0
Aldea San Antonio - Gchu	1115	1088	97.6	27	2.4
Gilbert	891	625	70.1	266	29.9
Gualeguaychú	75649	66443	87.8	9206	12.2
Larroque	5738	5492	95.7	246	4.3
Urdinarrain	7922	7272	91.8	650	8.2

Source: INDEC, Censo Nacional de Population, Hogares and Viviendas 2001

1.2.4 EDUCATION

Table 76

Department	Population 10 years or over	Condición de alfabetismo					
		Literate			Illiterate		
		Total	Males	Women	Total	Males	Women
Gualeguaychú	83.067	81.153	39.265	41.888	1.914	1.072	842
%	100	97,69	97,7	98,03	2,3	2,65	1,97

Source: INDEC. Censo Nacional de Population, Hogares y Viviendas 2001.

Table 77
Population 15 years or older by maximum level of instruction reached. 2001

Maximum level of instruction reached	Region			
	Total Entre Ríos		Gualecuaandchú	
	Casos	%	Casos	%
Without instruction / Primary incomplete	182847	22,5	14824	20,2
Primary complete / Secondary incomplete	394599	48,5	36141	49,2
Secondary incomplete / Tertiary or university incomplete	172421	21,2	16657	22,7
Tertiary or university complete	63619	7,8	5773	7,9
Total	813.486	100	73.395	100

Source: Censo Nacional de Population, Hogares and Viviendas 2001.-

Table 78
POPULATION 3 YEAR OR OVER BY SCHOOL ATTENDANCE AND MANAGEMENT SECTOR, BY DEPARTMENT. YEAR 2001

Sex and age	Population 3 years or over	School attendance					
		Attending			No attendance		
		Total	Management sector		Total	Attended	Never attended
			State	Private			
Total Provincia	1.090.708	348.119	271.940	76.179	742.589	676.977	65.612
%	100,0	29,8				63,8	6,4
Gualeguaychú	96.002	29.386	21.414	7.972	66.616	61.525	5.091
%	100,0	30,6				64,1	5,3

Fsource: INDEC. Censo Nacional de Population, Hogares y Viviendas 2001.

1.2.5 WORK

Table 79
POPULATION 14 YEARS OLD OR OVER, BY ACTIVITY CONDITION. YEAR 2001

Region	Population 14 years or over	Activity Condition		
		Active		Inactive
		Working	Not working	
Total Entre Ríos	835.436	333.109	116.197	386.130
Gualeguaandchú	75.275	29.521	10.954	34.800

FSource: INDEC. Censo Nacional de Population, Hogares and Viviendas 2001.

Table 80
Population 14 years or over, by sex and activity conditiion. Year 2001

Region	Males 14 years of over	Activity Condition			Women 14 years of over	Activity Condition		
		Active		Inactive		Active		Inactive
		Working	Not working			Working	Not working	
Total Entre Ríos	404.051	216.424	61.545	126.082	431.385	116.685	54.652	260.048
Municipio de Gualeguaychú	26.829	13.699	4.779	8.351	29.732	7.827	4.179	17.726

Source: INDEC. Censo Nacional de Population, Hogares and Viviendas 2001.

Table 81
Gualeguaychú: Working Population 14 years old or over, by separate activity. Year 2001

Separate activity branch	Working	%	% by sector
Agriculture, cattle raising, hunting, and forestry	3813	12,9	
Fishing and related services	17	0,1	13,1
Mines and quarry exploitation	19	0,1	
Manufacturing industry	3038	10,3	
Construction	1908	6,5	17,5
Electricity, gas,and water	208	0,7	
Wholesale and retail commerce; automotive vehichles, motorcycle repairs, personal effect and domestic effects repairs.	5151	17,4	
Teaching	2726	9,2	
Public administration, defense and mandatory social security	2496	8,5	
Finance and other financial services	286	1	
Transportation service, storage and communications	1752	5,9	
Community, social, and personal services n.c.p.	1283	4,3	65,5
Services to private homes who hire domestic services	2263	7,7	
Hotel and restaurant services	644	2,2	
Organization and extraterritorial organism services	3	0	
Real estate, managerial, and renting services	1386	4,7	
Social and Health Services	1381	4,7	
Not well specified activities	1147	3,9	3,9
Total	29521	100	100

Source: INDEC,2001

Table 82
Rate of activity and unemployment of the Population of the Gualeguaychú Department

Location	Population 14 years or over	Rate of activity	Unemployment Rate
Rural Disperse Population	2745	57.1	15.6
Alarcón	176	52.8	14.0
Aldea San Juan	338	55.3	15.5
Costa Uruguay Norte	284	47.9	16.2

Location	Population 14 years or over	Rate of activity	Unemployment Rate
Cuchilla Redonda	207	54.6	25.7
Distrito Talitas	134	54.5	9.6
Enrique Carbo	655	45.5	16.4
Estación Escriña	157	52.9	28.9
Faustino M Parera	313	46.0	22.9
General Almada	221	44.8	23.2
Irazusta	332	38.3	6.3
Las Mercedes	144	53.5	13.0
Pueblo General Belgrano	1105	58.0	27.8
Rincon Del Cinto	89	41.6	5.4
Rincon Del Gato	46	19.6	0.0
Aldea San Antonio	890	57.3	11.8
Gilbert	656	50.9	22.2
Gualeguaychú	56561	53.9	29.4
Larroque	4212	52.7	20.1
Urdinarrain	6010	53.9	22.8

Source: Censo Nacional de Population, Hogares and Viviendas 2001

Table 83
POPULATION 14 YEARS OR OVER WORKING, BY OCCUPATIONAL CATEGORY, BY DEPARTMENT. YEAR 2001

Department and sex	Working Population	Worker or employee		Chief	Independent worker	Family worker	
		Public Sector	Private Sector			With salary	Without salary
Total Province	333.109	87.757	135.005	21.526	72.274	5.056	11.491
	100,0	26,3	40,5	6,5	21,7	1,5	3,4
Gualeguaychú	29.521	6.625	12.584	2.427	6.542	459	884
	100,0	22,4	42,6	8,2	22,2	1,6	3,0

Source: INDEC. Censo Nacional de Population, Hogares y Viviendas 2001.

1.2.6 HEALTH

Table 84
Population by social work coverage and/or Private or mutual health plan. Year 2001

Gualeguaychú Department	Total	Social work and/or private or mutual health plan			
		Has		Does not have	
		Casos	%	Casos	%
Rural Disperse Population	3685	1938	52.6	1747	47.4
Alarcón	272	108	39.7	164	60.3
Aldea San Juan	466	139	29.8	327	70.2
Costa Uruguay Norte	367	180	49.0	187	51.0
Cuchilla Redonda	281	143	50.9	138	49.1
Distrito Talitas	173	55	31.8	118	68.2
Enrique Carbo	902	408	45.2	494	54.8
Estación Escriña	189	81	42.9	108	57.1

Gualeguaychú Department	Total	Social work and/or private or mutual health plan			
		Has		Does not have	
		Casos	%	Casos	%
Faustino M. Parera	409	166	40.6	243	59.4
General Almada	309	144	46.6	165	53.4
Irazusta	414	163	39.4	251	60.6
Las Mercedes	192	83	43.2	109	56.8
Pueblo General Belgrano	1503	661	44.0	842	56.0
Rincon Del Cinto	108	48	44.4	60	55.6
Rincón Del Gato	60	35	58.3	25	41.7
Aldea San Antonio – Gchu	1127	602	53.4	525	46.6
Gilbert	917	422	46.0	495	54.0
Gualeguaychú	76220	39350	51.6	36870	48.4
Larroque	5764	3038	52.7	2726	47.3
Urdinarrain	7992	4476	56.0	3516	44.0

Table 85
Acces and Use Indicators. Entre Ríos. 2003

Number of Doctors (1998)	2.610
Number of available beds in assistance institutions (2000) OPS - MS.	6751
Total number in assistance institutions – all subsectors (2000) OPS - MS.	604
Number of institutions with in patient service - all subsectors (2000) OPS-MS.	150
Number of institutions without in patient service - all subsectors (2000) OPS-MS.	454
Total of health institutions of the public subsector l with in-patient service (2000) OPS-MS.	66
Total of health institutions of the public subsector without out patient service (2000) OPS-MS.	241
Percentage of the Population not covered by Social Work or Health Plan (2001). Elaborated on data supplied by INDEC 2002.	48.7

Source: Dirección de Estadística (Argentina) en base a Ministerio de Salud and Ambiente de la Nación

Table 86
Gross Mortality rates (B) and adjusted by age (A) by group of causes (x 100.000 inhabitants). 2003

	Cardiovascular		Tumors		Infections		Violent deaths		All the rest	
	B	A	B	A	B	A	B	A	B	A
Total Country	**249.46**	**234.24**	**150.99**	**145.47**	**75.91**	**71.74**	**49.26**	**48.58**	**267.18**	**255.27**
Entre Ríos	257.25	250.27	162.62	160.12	47.09	45.16	43.16	42.83	297.56	288.57

Source: MS e INDEC

Table 87
General Mortality and by sex. Gross and adjusted rates by age. 2002

Indicator	Gross mortality rate (per 1000 inhabitants)			Mortality rate adjusted by age		
	Total	Males	Women	Total	Males	Women
All the Country	7.93	8.67	7.21	7.55	9.85	5.82
Entre Ríos	8.09	9.02	7.17	7.94	10.51	5.96

Source: MS e INDEC

Table 88
Entre Ríos. Notified illnesses by year

Illness	**1998**	**1999**	**2000**	**2001**	**2002** (1)	**2003**
Hepatitis (2)	491	614	1.426	1.425	...	1.527
Parotiditis	2.058	431	250	193	297	252
Rubéola	1.399	281	139	57	75	91
Diarreas	6.986	15.827	15.472	11.560	24.411	14.065
Tifoid fever	.	11	88	87	59	32
Neumonia	1.308	1.858	1.826	1.397	2.964	3.726
Influenza	15.355	20.018	21.434	13.437	26.160	35.856
Tuberculosis	308	206	140	316	284	165
Sifilis (3)	153	60	112	...	...	116
Aids (4)	6 (5)	2 (5)	3 (5)	...	103 (4)	95 (6)
Chagas	.	39	4	899	...	82
Cholera	-	-	-	-	-	-
Leptospirosis	.	1	21	12	10	s/d
Meningitis	78	48	26	27	36	s/d

(1) The increase of the notification es due to the implementation of Watch Program in Argentina. Improvement in obtaining data implied and increase in the number of cases notified.
(2) The data corresponds to the total of hepatitis A, B, C cases without specifying.
(3) The data corresponds to the different types of sifilis: congenial sifilis, sífilis grade 1º and 2º and without specifying.
(4) Data corresponds to the total of tose sick.
(2) (5) Data corresponds to new cases.Los datos corresponden a nuevos casos.
Source: Secretaría de Salud. Dirección de Epidemiología. Dto. Vigilancia de Epistemológica. de Epidemiológica and División laboratorio.

Table 89
TOTAL NUMBER OF TRAFFIC ACCIDENTS, INJURES AND DEATHS. YEAR 1998/2003

	ACCIDENTS						**INJURED**						**DEATHS**					
Region	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**
Total Entre Ríos	**1.442**	**1.484**	**1.349**	**1.291**	**1.027**	**885**	**2.028**	**2.029**	**1.771**	**1.700**	**1.342**	**1.246**	**159**	**145**	**121**	**135**	**136**	**138**
Gualeguaychú	49	56	42	48	19	17	68	86	54	37	16	18	9	9	9	14	14	9

SOURCE: Jefatura de Policía de la Provincia de Entre Ríos.

Table 90
Amount of suicides per region

	AMOUNT OF SUICIDES															
	TOTAL				**LESS THAN 22 YEARS**				**22 TO 50 YEARS**				**OLDER THAN 50 YEARS**			
	MALES		**WOMEN**		**MALES**		**WOMEN**		**MALES**		**WOMEN**		**MALES**		**WOMEN**	
Region	**2002**	**2003**	**2002**	**2003**	**2002**	**2003**	**2002**	**2003**	**2002**	**2003**	**2002**	**2003**	**2002**	**2003**	**2002**	**2003**
Total Entre Ríos	**102**	**105**	**16**	**16**	**14**	**15**	**4**	**2**	**49**	**55**	**7**	**9**	**39**	**35**	**5**	**5**
Gualeguaychú	6	8	3	2	-	-	1	1	3	4	1	-	3	4	1	1

SOURCE: Jefatura de Policía de la Provincia de Entre Ríos.

1.2.8 PUBLIC SAFETY

Table 91
ENTRE RÍOS: CRIMINAL ACTS WITH POLICE INTERVENTION, BY TYPE OF CRIME. YEARS1998/2003

TIPO DE DELITO	1998	1999	2000	2001	2002	2003
Total	**19.852**	**20.968**	**23.182**	**22.874**	**26.121**	**25.853**
Homicides dolosos	90	88	84	95	105	
Against persons	4.642	4.549	4.498	4.549	4.369	4.990
with honesty	203	221	209	193	218	221
With civil status	-	-	-	2	*	*
With liberty	2.180	2.155	2.366	2.484	2.368	2.564
Against property	11.907	12.722	14.712	14.384	18.367	17.345
With common safety	180	201	230	195	173	235
With public tranquillity	22	17	17	16	*	*
UIT administration	265	231	282	291	297	263
W / public testimony	45	57	53	52	74	42
Forbidden games (*)	119	66	47	71	14	*
Law 23.737 of drugs (*)	31	39	31	34	11	*
Foreseen frimes by special laws (*)	128	307	289	201	325	*
Other crimes	40	315	364	307	240	189

* Do not constitute crimes, but faults (infringements in general) against provincial and national laws..
SOURCE: Jefatura de Policía de la Provincia de Entre Ríos. División Planeamiento

Table 92
RATE OF DELINQUENCY BY 10.000 INHABITANTS BY CALENDAR YEAR. YEARS 1998 / 2003 (1)

Region	1998	1999	2000	2001	2002	2003
Total Entre Ríos	**181,1**	**185,9**	**204,9**	**197,7**	**225,8**	**227,0**
Gualeguaychú	209,7	216,8	228,4	188,2	213,4	241,6

(1) Includes infringements to special laws (provincial and nationals).
Fuente: Jefatura de Policía de la provincia de Entre Ríos.

1.2.9 AGRICULTURAL ACTIVITY

Table 93
Amount of area of the total EAP, by extension

Quantity of the extension of the EAP (ha)	Entre Ríos		Gualeguaychú	
	Ha	EAP	Ha	EAP
Up to 5	2.306,4	841	222,1	70
5,1 – 10	6.915,7	854	579,8	71
10,1 – 25	49.456,9	2.675	3.281,0	180
25,1 – 50	150.219,5	3.911	10.270,8	272
50,1 - 100	316.945,6	4.291	23.451,1	310
100,1 - 200	502.018,3	3.475	51.879,7	359
200,1 - 500	911.206,4	2.863	108.550,4	332
500,1 – 1.000	936.671,5	1.333	109.961,9	153
1.000,1 - 1.500	628.480,3	511	78.176,8	64
1.500,1 - 2.000	443.768,0	258	47.042,7	27
2.000,1 - 2.500	330.833,5	148	42.065,0	19
2.500,1 - 3.500	542.367,4	183	58.227,0	19
3.500,1 - 5.000	449.992,0	107	64.265,0	15
5.000,1 - 7.500	448.310,5	76	79.259,0	13
7.500,1 - 10.000	220.183,9	26	24.554,0	3
10.000,1 - 20.000	267.790,9	20	26.410,8	2
Más de 20.000	144.045,8	5		
Total	**6.351.512,6**	**21.577**	**728.197,1**	**1.909**

Note: the period of reference of the CNA 2002 is the one comprised between July 1 2001 and June 30, 2002

Source: INDEC, Censo Nacional Agropecuario 2002.

Table 94
Gualeguaychú Amount and area of the EAP with definite limits, per ownership of the land

	Total	Property or undivided succession	Leased	Aparcería	Accidental contract	Occupation With permit	Occupation de hecho	Other	Other combinations
EAP	1,909	1,197	573	17	48	19	3	10	30
Ha	728,197.1	394,859.6	200770	8946	55024	4,059.0	249.0	6,545.6	24,543.2

Source: INDEC, Censo Nacional Agropecuario 2002

Table 95
Total surface of the EAP with defined limits, by use of land type

Ue of land type			Hectares Entre Ríos	Hectares Gualeguaychú
Planted surface	Total		1.755.850,5	215.727,7
	Crops	Anuales	1.178.739,3	141.211,6
		Perennes	48.409,8	57,8
	Forages	Anuales	136.055,0	18.051,0
		Perennes	275.884,4	54.103,0
	Forest and/or short wood		113.977,0	2.209,0
	Undiscrimitated crops		2.785,0	95,3

Ue of land type		Hectares	
		Entre Ríos	Gualeguaychú
Area designated to other uses	Total	4.595.662,1	512.469,4
	Pastures	2.622.146,8	375.980,3
	Forest and/or espontaneous woodland	1.549.678,8	89.474,6
	Apt not used	142.018,3	26.731,5
	Not apt or for waste	225.462,1	15.654,6
	Roads, parks and housing	45.898,4	4.628,4
	Undiscriminated use	10.457,7	
Total		6.351.512,6	728.197,1

Nota: the period of reference of the l CNA 2002 is the one comprised between July 1st 2001 and June 30 2002.

Source: INDEC, Censo Nacional Agropecuario 2002.

Table 96
Entre Ríos Forest Surface by type. 2002

Province	Natural Region	Forestry Area			
		Forestry lands	Rural forestry	Native Forest	Other forestry lands
Entre Ríos	Espinal	-	-	-	1,053,931

Source: Ministerio de Salud. Secretaría de Ambiente and Desarrollo Sustentable. Dirección de Bosques, Unidad de Manejo del Sistema de Evaluación Forestal.

Table 97
Entre Ríos Regime of promotion of forest plantations (hectares)

FORESTRY (in land)

Year	Presented	Approved	Obtained	Relation	Amount($)
1992	2.542,02	2.425,32	1.717,10	70,80	705.355,00
1993	721,48	721,48	616,00	85,38	257.209,00
1994	0,00	0,00	0,00	0,00	
1995	1.179,02	1.117,02	1.010,75	90,49	331.799,00
1996	3.187,13	3.128,13	2.708,78	86,59	876.774,50
1997	5.364,76	5.219,77	4.358,92	83,51	1.200.442,21
1998	5.353,19	4.696,18	3.683,33	78,43	1.240.159,40
1999	8.700,47	7.380,68	6.147,29	83,29	2.025.485,58
TOTAL	27.048,07	24.688,58	20.242,17	81,99	6.637.224,69

Ellaborated by the Forestry Direction. Source RPPF

ANNEX II

Tourism Assessment Study, April 2006

URUGUAY PULP MILLS PROJECT

TOURISM ASSESSMENT

OF

GUALEGUAYCHU

IN THE

PROVINCE OF ENTRE RIOS

ARGENTINA

AND

FRAY BENTOS

IN THE

DEPARTMENT OF RIO NEGRO

URUGUAY

Peter Smith
Consultant
Draft of 14 April, 2006

LIST OF TABLES

I. TEXT TABLES

Introduction

The International Finance Corporation (IFC) is considering the provision of finance to the CMB and Orion Pulp Mill Projects, proposed to be located in Fray Bentos, Uruguay, on the left bank of the Uruguay River, a waterway that marks the border between that country and Argentina.

In response to comments made by stakeholders at public hearings in Montevideo and Buenos Aires in February 2006, the IFC decided to obtain further information in several areas related to the pulp mills, including tourism. The objective of this report is to prepare a profile and economic baseline of the tourism sector in: the Argentine province of Entre Rios, with particular focus on the area of Gualeguaychú/Nandubaysal; and the Uruguayan department of Rio Negro, with particular focus on Fray Bentos/Las Canas[1]. The information in this report supplements that already contained in the Cumulative Social Impact Study, included in the draft CIS report of December 19, 2005.

To carry out this supplemental work visits were made to Gualeguaychu and Fray Bentos, as well as to Buenos Aires and Montevideo, in order to interview informed persons and obtain primary and secondary data.

The report is based on the data and information obtained during those brief visits and on other information available to the general public. Where data did not exist, or was not made available, suggestions have been made for use of proxy information that provides an indication of the level of tourist activity and of trends.

The tourism profile and the economic baseline data can be used to determine a rough order-of-magnitude estimate of the importance of the tourism sector in the economy of the two localities. Excel spreadsheets models have been developed which synthesize the main characteristics of the tourism sector for Gualeguaychu over the period 1997-2005 and for Las Cañas/Fray Bentos over the period 2000 – 2005. The models show, for each year and by type of lodging, the number of visitors, visitor-nights, hotel occupancy and gross visitor expenditures, the latter mostly in the hotel, restaurant and service sectors in both Gualeguaychú and Fray Bentos.

These models are set up to allow users to change key variables, such as the availability of different types of accommodation, average length of stay, average visitor spending etc. to show the effects of different values of the key variables.

The consultants wish to thank the Mayor of Rio Negro Department, Dr. Omar Lafluf, and the Director of Tourism for the Department of Rio Negro, Lic. Ricardo Laurentz, and their colleagues in the departmental government for their time and help in providing information and arranging for interviews with representatives of the tourist industry in Rio Negro. We also wish to thank Lic. Victor Sosa, Director for the Research and

[1] Henceforth Gauleguaychú/Nandubaysal and Fray Bentos/Las Canas will be referred to simply as Gualeguaychú and Fray Bentos, respectively, except in cases where there is specific reference to Nandubaysal or Las Canas.

Statistics Division of the Uruguayan Ministry of Tourism and Sports for supplying up-to-date information on tourism in Uruguay.

Thanks are also due to Dr.Diego Fernandez of Estudios Fernandez Tesone, for providing information on the profile of tourists attending the annual Gualeguaychu Carnival, and for spending time explaining the methodology and results of the sample surveys, which his firm carries out annually on behalf of the Association of Carnival Clubs.

Summary of Findings

A summary table has been prepared to provide an overview of the findings of this tourism assessment of Gualeguaychú and Fray Bentos. There are a number of similarities and a number of differences in the characteristics of tourism in these two localities and in the profile of the visitors.

Tourism in both Gualeguaychú and Fray Bentos is highly seasonal, with a majority of tourists visiting during January and February. Camping plays a significant role in both places, accounting for about 43% of visitors to Gualeguaychú and 22% to Fray Bentos in 2005. Both places offer beach facilities on the Uruguay River, combined with extensive camping facilities – at Ñandubaysal near Gualeguaychú and at Las Cañas near Fray Bentos. Both places offer casinos.

Tourism on both sides of the Uruguay River suffers from violent cyclical economic fluctuations. During the last crisis, in 2002, the number of visitors to the Gualeguaychú Carnival fell from 129,000 in 2001 to 109,000 and expenditures by these visitors dropped from about US$18.1 in 2001 to US$6.7 million in 2002. In Fray Bentos the number of international visitors fell from 112,000 in 2001 to 62,000 in 2002 and their expenditures fell from about US$20.9 million in 2001 to about US$9.5 million in 2002.

The Carnival at Gualeguaychú is unique in that it is not restricted to Carnival Week, as in other locations, taking place on every weekend during January and February. It attracts large numbers of visitors; the record one night attendance was about 33,000. Gualeguaychú also has a more extensive infrastructure of tourist establishments than Fray Bentos. On the other hand, unique to Fray Bentos are about 350 vacation houses in Las Cañas, mostly owned by Argentines, at which their owners stay or which they rent out to other visitors. An advantage that Gualeguaychú has over Fray Bentos as a tourist destination is its proximity to a large metropolitan area, Buenos Aires, with a huge actual and potential clientele within two hours driving distance. International visitors to Fray Bentos make up about 75% of total visitors, while at Gualeguaychú; the percentage of non-Argentines is still fairly small.

From the Summary Table[2] it can be seen the Gualeguaychú has a considerable number of visitors, who stay a relatively short amount of time and spend a relatively small amount

[2] The most recent year for which Gross Domestic Product was obtained for the City of Gualeguaychú and for the Department of Rio Negro is 2003; the percentages stated in the summary table refer to 2005 visitors and 2003 gross product.

per day. The total expenditure by visitors, however, is important, contributing an estimated 8% to the city's gross product and providing about 250 full time jobs and about an additional 1,000 part-time jobs during the high season.

Fray Bentos has a modest amount of international and local visitors, who stay for just short of a week on the average and spend a moderate amount per day. The total expenditure implies a contribution of about 4% to the Departmental Product. It is estimated that tourism employs about 100 people full time and an additional 500 during the high season.

Summary Table
Tourism Assessment of Gualeguaychú and Fray Bentos
Principal Findings

	Units	Gualeguaychú	Fray Bentos
Visitors (2005)	'000s	334	62
Average Length of Stay (2005)	Days	3.2	5.2
Visitor – Days (2005)	'000s	1,023	321
Visitor Expenditure (2005)	US$/Day	17.94	37.02
Visitor Expenditure (2005)	US$ Million	18.3	11.9
Area Gross Product (2003)	US$ Million	149.1[3]	184.0[4]
Tourism Value Added[5] (2005)	US$ Million	11.9	7.4
Tourism % of 2003 Gross Product	Percentage	8.0%	4.0%
Tourism Jobs All Year[6] (2005)	Number	250	100
Additional Seasonal Tourism Jobs	Number	1,000	500
Area Jobs	Number	29,800[7]	9,500[8]
Tourism Peak Jobs % Total	Percentage	4.2%	6.3%

Methodological Considerations

This report attempts to document the spending of tourists in the local economies, a first step in the determination of the economic significance of the tourist sector. The importance of tourism on a local economy is the sum of three contributions: the direct, the indirect and the induced.

1. The direct contribution, which is the amount of money retained by the local business community after deducting all expenses incurred in doing business. Examples include the net receipts attributed to tourist activity of hotel operators, restaurants, amusement operators, transport etc.

[3] City of Gualeguaychú. Gross Product: AR$ 499,378,333. Source: Development Corporation of Gualeguaychú, 2003.
[4] Refers to Department of Rio Negro. Source: Budget and Planning Office of the President, 2005
[5] Taken as 65% of visitor expenditures, implying 35% intermediate inputs.
[6] Tourism employment numbers are representative informed estimates by persons involved in the sector.
[7] Fully plus partially employed in July 2005. Source: Centro de Estudios León XIII, January 2006.
[8] Refers to Department of Rio Negro, 2003. See Table 45.

2. The indirect contribution, which is the increase in spending by local businesses to supply other businesses that are directly involved in selling to tourists. An example of this would be the sale of produce for use by tourists by local farmers to supermarkets and other retail outlets.
3. The induced or generated contribution, which is the spending in the locality by those employed directly in the tourist sector and by new investment by the private and public sectors, resulting from tourist receipts For example, a hotel employee will purchase goods from local merchants or eat in local restaurants.

The direct contribution can be estimated by a complete or sample survey of all businesses engaged in tourism, in which revenues, expenses and employment are documented. For each business the amount of activity attributable to tourism has to be determined, in order to correctly document the tourism component. The sum of tourist – related revenues for each sector less intermediate inputs provides the value added for the businesses and for the tourism industry and hence the direct contribution of tourism to the regional or national domestic product. The indirect and induced impacts would have to be calculated with the use of input-output tables, preferably at the local level.

Several difficulties arise in locations such as Gualeguaychú and Fray Bentos: none of the information related to business operations is regularly collected and available from a single source, and there is an understandable reluctance to provide this kind of information, which is considered to be confidential.

Furthermore, input-output tables have been compiled only at the national level, which means that they would be unreliable sources of information for a local economy.

Until recently in most countries only incomplete data existed on the revenues and value added related to tourism. A major reason for this is the difficulty of knowing the amount of activity in each sector that is directly tourist-related. Even hotels, which in some localities might appear to be solely engaged in serving tourism, turn out on closer inspection to offer some services to the local community rather than to tourists; for example by hiring out reception rooms for local social events.

In Argentina and Uruguay, although considerable effort is put into the development of statistics on tourism, estimates of the contribution of tourism to the economy, at the provincial, departmental and local levels are generally imprecise and incomplete. This is not surprising as the gathering of such information is time consuming and costly. [9]

At the national level information on the number of international visitors and estimates of their expenditures is provided by most countries, including Argentina and Uruguay, on an ongoing basis through continuous visitor surveys, which are conducted in conjunction

[9] Estimating the contribution of tourism to the national or local economy requires calculations that are compatible with the national accounting framework as the contribution of the sector is measured in terms of value added. To simply add up receipts from tourism, though a measure of tourism activity and an indicator of gross foreign exchange earnings, overestimates the contribution to national or local domestic product, as the corresponding intermediate inputs need to be deducted in order to arrive at the value added.

with immigration activities; these data are reported, on an annual basis, both by the countries concerned and by the World Tourist Organization. However, there are few continuous surveys of internal tourism expenditure.

Both Argentina and Uruguay have adopted the UN Standard System of National Accounting (SNA) and, as mentioned previously, both have multi-sectoral input-output (I/O) tables at the national level: Argentina for 1997 and Uruguay for 1983, the latter updated using the RAS method, to incorporate information useful for reflecting temporal changes in intersectoral relationships. These I/O tables enable the measurement of national economic activity in the sectors related to tourism and of the estimation of the indirect and induced impact of activities in each sector on economic activity in all other sectors. However, they do not reflect the precise impact of tourist activity as only part of the activity of any sector relates to tourism as there is no differentiation in the national accounts, and therefore in the I/O tables[10], between tourist related and non-tourist related activities. Furthermore, it is not possible with existing information to determine the relationship between tourist employment and tourist economic activity at the sectoral level.

The introduction of Tourist Satellite Accounts (TSA), based on the SNA allows the differentiation of tourist and other activities at the national level, permitting more accurate estimates of the tourist industry's GDP and employment. Argentina is moving towards use of TSA and as a first step in 2004 introduced more detailed surveys of international visitors and a new survey of hotel occupation. Uruguay has not yet begun to use TSA, but there is considerable interest in doing so, especially as tourism is of major importance to specific regions of the country as a means of employment and income, and on the national level as a major earner of foreign exchange, and it can be expected that there will be a move to TSA accounting in the near future.

PART I TOURISM PROFILE OF GUALEGUAYCHU

The Tourism Sector in Argentina

Tourism is increasingly important in Argentina in terms of its contribution to the national income and as a source of employment, although precisely how much is not known.. There were almost 3.4 million international visitor arrivals registered in 2004 accounting for an estimated US$2.5 billion in spending, equivalent to about 1.6% of Gross Domestic Product (GDP). On the other hand, tourist receipts as a percentage of exports in recent years have been well below historical levels, as shown in Table 1. Tables A1 through A3 show the number of visitor arrivals and total and per capita visitor expenditure, respectively. The largest numbers of visitors are from neighboring countries. There was a sharp drop in the overall amount of US dollar expenditures following the devaluation of the Argentine peso in early 2002 and by 2004 total revenues were still well below those in 1998, the peak year for international tourism expenditures. The effect of the devaluation can also be seen in terms of per capita tourist expenditures. It will be noted that per capita spending by Uruguayans seems be the lowest of all nationalities; this is a

[10] Which are reported within the framework of the SNA.

result of tourists staying with friends and family in the large Uruguayan expatriate community, especially in Buenos Aires, thereby avoiding the costs of lodging.

Table 1
Argentina
International Tourism Indicators
1995 – 2004

Year	Arrivals ('000s)	Expenditure/Visitor (US$)	Expenditures/GDP (%)	Expenditures/Exports (%)
1995	2,289	937	0.8	10.1
1996	2,614	972	0.9	10.6
1997	2,764	974	0.9	10.2
1998	3,012	975	1.0	11.1
1999	2,898	970	1.0	12.1
2000	2,909	968	1.0	10.7
2001	2,620	972	1.0	9.6
2002	2,820	524	1.5	5.8
2003	2,995	648	1.5	6.6
2004	3,353	743	1.6	7.2

Source: INDEC

Information on internal tourism is not so well documented, although from the INDEC-SECTUR Survey on Hotel Occupancy it can be established that in 2005 there were at least 37 million overnight stays in hotels and parahotels[11], of which about 28 million nights were accounted for by residents of Argentina, and about 9 million nights by non-residents.[12] The average stay in hotels and parahotels is 2.5 nights, both for residents and non-residents. Annex Tables A4 through A6 show the number of internal visitors, visitor nights and nights per visitor for the first ten months of 2005, as reported in the Survey of Hotel Occupancy. The Buenos Aires region, which includes the Atlantic beach resorts of the Province of Buenos Aires, exhibits the same seasonal variations in the number of visitors and the length of stay as found in Gualeguaychu: very high numbers and longer stays during January and February and low numbers and shorter stays in the rest of the year.[13]

Argentina's GDP grew steadily through the 1990s to reach a peak in 1998, after which it declined in every year to 2001 and in 2002 there was an almost 10% reduction over the previous year in real terms, after which there was a recovery so that by 2004 Argentina had almost recovered to peak 1998 levels.

The hotel and restaurant sector showed a similar pattern, with the drop in activity in 2002 reaching 82% of the 1998 peak. The subsequent recovery was not so significant as for

[11] Parahotels are those establishments not classed as hotels, but offering similar services. These would include apartment hotels, bungalows, bed and breakfast establishments, residences etc.
[12] Annualized on the basis of ten months data.
[13] Although some localities, such as Bariloche and San Martín de los Andes capitalize on winter activities and attract a considerable amount of tourists, particularly in July, August and September.

overall economic performance. Spending on hotels and meals are to a great degree highly discretionary and there was an unwillingness to revert immediately to previous spending behavior for these items. Table 2 summarizes the trends in the economy and in the hotel and restaurant sector over the period 1993 – 2004.

Table 2
Argentina
Total Gross Domestic Product and Contribution of Hotels and Restaurants
(In millions of Argentina pesos of 1993)

Year	GDP	Hotels and Restaurants	H & R as Percentage of GDP	GDP Index 1998 = 100	H & R Index 1998 = 100
1993	217,798	5,432	2.5%	82.6	71.9
1994	230,406	5,894	2.6%	87.4	78.1
1995	224,283	5,738	2.6%	85.1	76.0
1996	235,857	6,309	2.7%	89.4	83.6
1997	253,995	7,100	2.8%	96.2	94.0
1998	263,708	7,551	2.9%	100.0	100.0
1999	255,976	7,236	2.8%	97.1	95.8
2000	254,125	7,236	2.9%	96.4	95.8
2001	244,052	6,708	2.8%	92.6	88.8
2002	221,317	6,152	2.8%	83.9	81.5
2003	239,800	6,522	2.7%	90.9	86.4
2004	260,172	6,978	2.7%	98.7	92.4

Source: INDEC

<u>The Tourism Sector of Entre Rios</u>

The Province of Entre Rios accounts for about 3.2% of Argentina's population, and about 2.1% of gross domestic product. Gross Provincial Product (GPP) of Entre Rios in the last decades has followed national trends, although the decline in 2002 was not so precipitous as for the national economy and by 2004 the province had recovered to peak year levels.

The hotel and restaurant sector, on the other hand, while witnessing high levels of activity prior to 1998 and substantial decline through 2001, showed a very large drop in activity in the crisis year of 2002 when the value added by hotels was only 71% of the peak 1998 level and that for restaurants was 74% of the peak, but the sector recovered somewhat in the following year.

As a result, and contrary to trends in the country as a whole, the hotel and restaurant sector in Entre Rios is progressively contributing less to GPP. In 1993 the combined contribution of hotels and restaurants was 1.9% of GPP and by 2003 it was only 1.4% of GPP. Table 3 provides a summary of the trends in GPP and in the provincial hotel and restaurant sector.

Table 3
Province of Entre Rios
Total Gross Provincial Product and Contribution of Hotels and Restaurants
(In millions of Argentina pesos of 1993)

Year	GPP	Hotels	Rest-aurants	H & R as % of GDP	GDP Index 1998=100	Hotels Index 1998=100	Restaurants Index 1998=100
1993	4,461	42.7	42.4	1.9%	81.3	100.3	98.2
1994	4,698	43.9	44.1	1.9%	85.6	103.3	102.2
1995	4,723	42.8	43.3	1.8%	86.0	100.7	100.4
1996	4,909	42.3	43.1	1.7%	89.4	99.6	99.9
1997	5,144	43.6	44.2	1.7%	93.7	102.4	102.5
1998	5,491	42.5	43.1	1.6%	100.0	100.0	100.0
1999	5,353	41.7	42.3	1.6%	97.5	98.0	98.1
2000	5,112	38.7	39.8	1.5%	93.1	91.0	92.2
2001	5,052	36.4	37.7	1.5%	92.0	85.7	87.5
2002	5,012	30.3	31.9	1.2%	91.3	71.4	74.0
2003	5,475	36.2	38.2	1.4%	99.7	85.2	88.5

Source: Government of Entre Rios.

The City of Gualeguaychú

Some indicators of the state of the economy of the City of Gualeguaychú include an estimate of the contribution to GDP in 2003 and income collected by the municipality:

1. It is reported by the Development Corporation of Gualeguaychú that in 2003 the gross domestic product contributed by the city was AR$499.4 millions, of which primary production account for 30%, industrial production 36%, commerce 11% and services 23%.

2. Municipal budgets over the past 4 years were as follows:

2002 AR$ 17.6 million
2003 AR$ 22.8 million
2004 AR$ 27.8 million
2005 AR$ 33.1 million

The 2003 estimate of contribution to the GDP would represent about 6.2% of GPP in that year. The population of the city in 2003 was 79,300 persons, about 3.2% of the provincial population. The progressive increase in municipal budget would seem to indicate that the City is making a strong recovery from the crisis of 2002.

In 2005 it is estimated that the population of the municipality of Gualeguaychú was about 82,000 persons, of which 53 per cent were women. The economically active population is about 34,000 persons, of which about 30,000 were employed, 17,000 full-time and

13,000 part-time. About 4,000 persons were unemployed. While employment as whole seems to have been increasing since 2001, full time employment has dropped from about 20,300 in 2001 to about 16,800 in 2005. Part-time employment, on the other hand, has increased from about 3,400 to about 13,000 over the same period. There is no indication of the importance of the informal economy. The following table shows estimated employment over the last five years..

Table 4
City of Gualeguaychú
Population and Employment estimates
(thousands of persons)

Population	2000	2001	2002	2003	2004	2005
Total	75.7	76.9	78.1	79.3	80.6	81.9
Economically active	28.2	24.6	28.5	29.0	28.5	33.6
Fully employed	21.0	18.2	20.3	18.6	17.1	16.8
Partially employed	3.0	3.4	4.5	6.5	8.2	13.0
Unemployed	4.2	3.0	3.7	3.9	3.2	3.8

Sources: Based on National Census 1991 and 2001 and Centro de Estudios Leon XIII, 2006

The Tourism Sector of Gualeguaychú

There are a diverse number of different tourist facilities in Gualeguaychú, including hotels, apartment hotels, bungalows, bed and breakfast facilities, dormitories and campsites. In 2006 13 hotels and 54 parahotels were identified as well as 22 campsites[14]. On the average there were 284 available hotel rooms and 499 rooms in other lodging facilities during the first ten months of that year.[15] It is estimated that there are another 1,500 rooms available during the peak season. In addition campsites offered almost 5,000 places to pitch tents, including spaces in which to park mobile homes.[16] Tables A7 and A8 show the results of the INDEC-SECTUR survey for the periods 2004 and January – October 2005.

[14] Although it was possible to identify these by name, and some of which were inspected, as the local tourist director indicated that there would be no cooperation with the IFC until it stopped supporting the pulp mills in Uruguay, it was considered inappropriate to interview individuals in these establishments or in other tourist-related businesses about their operations. However, the number of hotels and parahotels identified coincided with data reported in the INDEC-SECTUR Survey of Hotel Occupancy for the first ten months of 2005 (available at www.turismo.gov.ar) and this information has, in addition to information about Carnival tourism, formed the basis of the rough calculations made to determine the importance of the tourism sector in the municipality.

[15] Although there is a drop in the number of available room nights shown for both hotels and other lodgings in February 2005, which it has not been possible to explain.

[16] Information on the capacity of hotels and other lodgings is taken from the Survey of Hotel Occupancy. Campsite capacity was estimated by inspection and capacity of private houses and friends and families had to be estimated on the basis of Carnival survey information.

In 2005 hotels and other establishments provided 2,683 beds, on the average, of which hotels accounted for about 754 beds and parahotels for 1,929 beds. The other facilities in private houses or with friends and family could provide another estimated 4,500 beds, although these numbers are not known. The sleeping capacity of campsites would exceed 20,000 places, for an average of 4 people per camping space.

Tourist lodging establishments employ about 243 people on a full-time basis, with hotels accounting for about one hundred of these. The campsites would directly employ an additional 30 people full-time. Over one hundred additional people would be hired on a part-time basis for the hotels and other lodgings to take care of the peak season in January and February. Campsites would also increase their personnel for the peak two months, possibly by as much as 100 people.[17] There would be additional employment directly attributable to tourism during the main tourist season of January and February in restaurants, entertainment, security and other tourism services. This employment might be expected to be 3 to 4 times the direct employment in hotels. and other lodgings[18]

Several local informed sources estimated that the tourist-related industry provides at least 1,200 to 1,300 jobs, of which about 200 to 300 jobs would be all year. Table 4 shows hotel and lodging information for the highest and lowest months and for the average for the first ten months of 2005.[19]

Table 5
City of Gauleguaychú
Hotel and Parahotel Statistics January – October 2005[20]

	Highest Month	Lowest Month	Average Month
Hotels No.	13	13	13
Hotel Rooms	294	252	284
Hotel Beds	756	741	754
Hotel Room Occupancy (%)	67.6%	32.2%	42.6%
Hotel Employment	109	97	103
Parahotels No.	54	51	52
Parahotels Rooms	522	476	499
Parahotels Beds	1,986	1,879	1,929
Parahotels Occupancy (%)	51.5%	9.0%	25.3%
Parahotels Employment	243	143	206

Source: INDEC-SECTUR Survey of Hotel Occupancy 2005..

[17] It is estimated that the beach resort of Nandubaysal employs about 350 people during January and February. There are many ancillary operations at the beach resort including a supermarket, which provide seasonal employment.
[18] Based on local opinion. This coincides with experience elsewhere, but the relationship is known to vary quite considerably according to the locality.
[19] In 2005 the Survey of Hotel Occupancy improved its coverage of "other lodgings" and for this reason it is not valid to compare information for 2005 with data from the 2004 Survey, the first year in which this survey was made.
[20] Parahotel refers to other hotel-like establishments such as aparthotels, bungalows, bed and breakfast, hostels etc. At the time of writing no data was available for November and December 2005.

Tourism in Gualeguaychú, as in Fray Bentos, is highly seasonal, concentrated on weekends, undertaken by persons with modest spending power and highly affected by overall economic conditions in the country and by the weather. The discovery of thermal springs in the area has led to projects for the development of thermal spas, which it is believed will attract tourists with higher spending power and reduce the seasonality of tourism.

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The Carnival is clearly the most important tourist attraction for Gualeguaychú. This takes place primarily on Saturday nights during January and February, and in some years the first weekend in March.

Carnival began in 1979, modeled on the annual Students' Parade (Desfile de Carrozas Estudiantiles), which included elaborately ornamented floats and costumes, traditionally held, and is still held, in Gualeguaychú every October. The Carnival now incorporates also many of the features of the famous Rio de Janeiro Carnival, including the establishment of clubs that compete in a league. Net revenues from the sale of entry to the parades finance the activities of the clubs in the league in preparation for the following year.

It is generally believed that the revenues associated with Carnival tourism account for about 70% of total annual tourist revenues.[21] In 2005 164,276 tickets[22] to the Carnival were sold and total expenditure by Carnival visitors was estimated to be about AR$31 million. Table 6 provides an historic series of the number of ticket sales; further details are shown in Tables A9 and A10.

Table 6
Gualeguaychú Carnival
Attendance Indicators 1994 – 2005

Year	Carnival Nights	Total ('000s)	Average/Night ('000s)	Max/Night ('000s)	Min/Night ('000s)
1994	11	190	17,3	31,3	7.3
1995	10	196	19.6	32.3	10.4
1996	11	181	16.5	31.3	5.1
1997	12	220	18.3	31.6	6.9
1998	10	161	16.1	27.4	5.6
1999	11	231	21.0	33.3	9.9
2000	12	186	15.5	25.8	7.5
2001	10	144	13.1	19.6	4.2
2002	8	121	15.2	22.3	6.0
2003	10	144	14.4	22.3	8.9
2004	10	156	15.6	26.5	2.8
2005	10	188	18.8	31.3	2.3
Average 94-05	10	177	16.8	27.9	6.6

[21] Subsequent calculations in this report estimate expenditures by visitors in January and February amounted to about 73% of the annual total for 2005, confirming this belief.
[22] Exceeded only by 1999 and 1997 when 231,041 and 220,051 tickets were sold respectively. Data covers adults and children. Babies, who are not charged, are not included in the data..

Source: Based of the Annual Survey of Carnival Visitors by Estudio Fernandez Tesone, Gualeguaychú

Attendance at Carnival is heavily influenced by the economic fortunes of the country and the weather. Attendance in the 1990s was at its highest, with the peak year being 1999. The previous year had witnessed severe flooding, not only in Entre Rios but also in the Provinces of Buenos Aires and Santa Fe, which supply a great proportion of the audience for the Carnival, hence the lower than anticipated numbers in that year. With the oncoming economic crisis there was a drop-off with attendance falling in 2002 to 53% of the 1999 level, and rising in subsequent years, to reach the third highest level in 2005.

About three quarters of the 2005 Carnival visitors originated in the City and Province of Buenos Aires; preliminary data for 2006 show that this has dropped to 70%. Of particular importance has been the increase in attendance by residents of Santa Fe and Cordoba Provinces, boosted by the opening of the Victoria-Rosario Bridge over the River Paraná, which substantially shortened the journey time and distance between those provinces and Gualeguaychú.. Table 7 shows the breakdown by place of origin of Carnival visitors.

Table 7
Gualeguaychú
Origin of Carnival Visitors 1994 - 2006
(Percentage distribution)

Year	Buenos. Aires	Entre Rios	Santa Fe	Cordoba	Others
1994	88.5	6.0	1.2	0.9	3.5
1995	88.9	4.3	2.8	1.5	2.5
1996	89.8	3.1	2.6	1.1	3.4
1997	87.8	3.8	2.8	1.2	4.4
1998	86.9	5.8	3.5	0.7	3.1
1999	85.9	5.1	4.2	1.0	3.8
2000	85.6	5.1	4.3	0.9	4.1
2001	84.1	4.9	5.0	2.2	3.9
2002	80.2	8.8	5.2	1.2	4.7
2003	79.8	5.8	7.3	2.6	4.5
2004	75.6	6.2	9.5	3.1	5.7
2005	75.7	4.7	9.6	3.0	7.0

Source: Annual Survey of Carnival Visitors by Estudio Fernandez Tesone, Gualeguaychú.

In recent years attendance at Carnival has approached the record levels of the late 1990s and in these circumstances the available lodgings in Gualeguaychu become full to capacity. As shown in Table A9, the all-time maximum attendance for a Carnival night exceeded 33,000 and the theoretical capacity of the Corsódromo, where the Carnival parade is held, is said to be 32,000. About 10% of the audience is made up of local residents.[23] Sleeping capacity of hotels and parahotel would be less than 3,000 beds and although campsites could accommodate up to about 20,000 persons, not everybody is prone to camping. The overflow persons desiring to sleep in a bed are accommodated in rented rooms in private houses and with friends and family. In recent years it appears that about two-thirds of visitors stay in paid lodgings, less than 10% with relatives and the balance either remain in their vehicles overnight or return home. In the "crisis" of 2002 those remaining in their vehicles reached a high of 9% of visitors.

Tables 8 summarizes the distribution of visitors by type of lodging and Tables A11 and A12 provide data on the numbers and percentage distribution of sleeping arrangements for visitors over the period 1994 – 2006.

Table 8
Gualeguaychú
Estimated Number of Carnival Visitors by Type of Lodging[24]
January and February of Each Year*
(In thousands)

Lodging	2000	2001	2002	2003	2004	2005
Hotel/Motel	18.1	18.4	10.0	20.3	16.4	22.7
Bungalows	4.4	5.8	5.2	7.1	10.9	11.9
Rooming Houses	25.5	15.6	11.1	23.0	30.8	22.7
Friends/Relatives	14.1	9.1	11.5	10.4	13.3	19.6
Campsites	46.7	29.7	35.9	37.4	33.8	53.6
Total Lodgers	108.8	78.6	73.7	98.2	105.2	130.5
Non-Lodgers	58.7	50.8	35.5	31.7	35.4	38.1
Total Visitors	167.5	129.4	109.2	129.9	140.6	168.6
Local Attendees	18.6	14.4	12.1	14.4	15.6	18.7
Total Attendees	186.1	143.8	121.3	144.3	156.2	187.3

Note: An assumption is made that 10% of the attendees are local residents.
* In some years the first weekend of March is included
Source: Annual Survey of Carnival Visitors by Estudio Fernandez Tesone, Gualeguaychú.

The average Carnival visitor in 2005 spent about AR$56 per day.[25] Daily spending is highest for visitors using hotels and lowest for those in campsites. Data is collected on

[23] This was believed to be the case by several informed persons, but no statistics to confirm this were made available.
[24] The Gualeguaychú Tourism Council develops its own estimates of Carnival attendance, hotel occupancy and number of visitors. However, this information was not made available to the Consultants while in Gualeguaychú. . However, from a third party source it was possible to obtain the Council's Tourist Information Bulletin No. 69, March 2006 in which it was stated that attendees at the Carnival for 2006 numbered 185,610, that the average daily expenditure was AR$54.56 and the average stay was 4.52 days. Occupancy of hotels was 81.93%, of other lodgings 80.92% and of camping sites 35.20%. There is furthermore a breakdown of average daily expenditure by type of lodging. As it is not possible to verify exactly what this information implies and as no time series was found from this source, it was thought advisable to use this data with caution for calculations of the importance of the tourist sector.
[25] Estudio Fernández Tesone, Survey of Carnival Visitors 2005.

length of stay in the Survey of Carnival Visitors for each night, when there is a performance.[26] The number of visitors in lodgings, visitor lodging nights and lodging - nights per visitor for the period 2000 – 2005 is summarized in Table 9.

Table 9
Gualeguaychú
Estimates of Lodging – Nights by Carnival Visitors
2000 - 2005

	2000	2001	2002	2003	2004	2005
No. of Visitors in Lodging	108,943	78,655	73,497	98,306	105,264	130,464
Visitor – Lodging – Nights	321,163	179,412	208,364	243,995	325,370	437,054
Nights per Visitor in Lodging	2.95	2.28	2.84	2.48	3.09	3.35

Source: Based on the Annual Survey of Carnival Visitors by Estudio Fernandez Tesone, Gualeguaychú.

Table 10 summarizes the expenditure per visit and per day in both Argentine pesos and US$ dollars. More details are given in Table A13..

Table 10
Gualeguaychú
Expenditures by Carnival Visitors
2000 – 2005

	2000	2001	2002	2003	2004	2005
Expenditure/Visitor (AR$)	118.33	113.15	90.75	122.75	166.30	179.78
Daily Expenditure/Visitor (AR$)	43.65	56.81	33.85	52.65	56.41	55.65
Total Expenditure (AR$ millions)	16,625	13,190	8,254	15,437	22,393	27,710
Total Expend. (Index 1993 prices)	92.9	74.5	35.7	60.5	80.3	91.4
Exchange Rate AR$/US$	1.00	1.00	1.90	3.35	2.88	3.01
Expenditure/Visitor US$	118.33	113.15	47.76	36.64	57.74	59.73
Daily Expenditure/Visitor (US$)	43.65	56.81	17.81	15.72	19.59	18.49
Total Expenditure (US$ millions)	16,625	13,190	4,344	4,608	7,775	9,206

Source: Base on the Annual Survey of Carnival Visitors by Estudio Fernández Tesone, Gualeguaychú.

[26] However it was only possible to obtain a global number and not a breakdown by type of lodging. There is some evidence in the INDEC-SECTUR data for hotels and para-hotels, but not for other types of lodgings. It is interesting to note that the length of stay reported by respondents varies considerably according to the day of the survey. For example in 2006, at the beginning of the high season respondents reported an average length of stay of 4.4 days, in the last week of Carnival the average length of stay is reported as 2.4 days.

The devastating effect of the River Plate Crisis of 2002 on Carnival revenues can be seen by examining total peso expenditure by visitors in terms of 1993 prices. Revenues in real terms in 2002 were only 36% of the peak year revenues. However, recovery has been rapid and by 2005 revenues had reach over 90% of the peak year.

The information on Carnival attendance, lodging and expenditures is a valuable source of information on tourism in Gualeguaychú, but it does not present the entire picture. Elements lacking are:

- Tourism during the Carnival period not related to Carnival
- Tourism during the period March – December

Some evidence exists to assist in these calculations for January and February for a number of years and for March – December for 2005.

In determining the likely number of tourists visiting the Gualeguaychú area in January and February the following assumptions were made:

1. While some tourists not attending the Carnival would be staying in hotels and parahotels, their number would be small and could be ignored for overall estimation of total numbers.
2. Similarly, the numbers of visitors not attending Carnival and staying in private houses or with friends and relatives would be small.
3. A major tourist attraction of Gualeguaychú for its, essentially urban, visitors is the outdoor environment, particularly the Gualeguaychú and Uruguay River areas, including the resort of Ñandubaysal.
4. Most non-Carnival visitors would be campers.
5. Non-Carnival campers would stay for longer periods than those that visited Gauleguaychú exclusively to attend Carnival.

Some evidence is available to estimate the number of visitors that are campers but do not attend the Carnival. From the Survey of Carnival Visitors it was established how many were Carnival campers. Without any evidence to suggest otherwise it was assumed that the length of stay for campers was the same as for all Carnival visitors. From information published by the Consejo Mixto Gualeguaychú Turismo in March 2006[27], it appears that 1,703.68 camping lots were occupied daily during the Carnival period, equivalent to an occupancy of 35.2% of the 4,840 estimated camping lots available in the area. The average length of stay for all visitors is given as 4.52 days. It is assumed that campers also stay on the average 4.52 days. Assuming an average of 3.25 days per Carnival camping visitor[28] then implies that the average non-Carnival camper would stay an average of 5.8 days.

Using the above as a guide, estimates were made for the number of camping visitors, visitor-nights and expenditure for the year 2005, for which the INDEC-SECTUR

[27] Boletin No. 69.
[28] The average length of stay given by the Survey of Carnival Visitors.

Survey of Hotel Occupancy supplies further data to support calculations for the period March-December.

A spreadsheet model was developed to facilitate calculations for the January – February Carnival period and to provide consistency and the possibility of changing variables as new or updated information becomes available. For the model the following information for each year was taken as reference data:

- Total expenditure by visitors
- Number of tickets sold to adults and children
- Average daily expenditure per visitor
- Percentage of visitors by type of lodging
- Percentage of attendees accounted for by visitors (90% - constant for each year)

The total number of visitors for 1999, the peak year, 2002 the year of the 'River Plate Crisis" and 2005, using the information obtained from the sources cited above and from estimates by the Consultants, as shown in the spreadsheet model, are summarized in Table 11.

Table 11
Gualeguaychú
Tourism Profile 1999, 2002 and 2005
January and February of each Year
Number of Visitors

Type of Lodging	1999 ('000s)	2002 ('000s)	2005 ('000s)	1999 %	2002 %	2005 %	2002 % of 1999	2005 % of 1999
Hotels/Parahotels	24.6	15.3	34.5	9.3	10.6	15.6	62.2	140.5
Other Paid	28.4	11.1	22.7	10.8	7.7	10.2	39.1	79.8
Friends/Relatives	16.0	11.5	19.6	6.1	7.9	8.8	71.5	122.5
Campsites	112.2	71.2	107.1	42.5	49.2	48.2	63.5	95.4
Stay in Vehicle	8.4	10.0	5.7	3.2	6.9	2.6	119.2	67.4
Return Home	74.3	25.7	32.5	28.1	17.7	14.6	34.5	43.7
Total Visitors	263.9	144.8	222.1	100.0	100.0	100.0	54.8	84.1

Source: Consultants' estimates based on Survey of Carnival Visitors by Estudio Fernandez Tesone., INDEC-SECTUR Survey of Hotel Occupancy 2004 and 2005 and Consejo Mixto Gualeguaychú Turismo Boletin No. 69, March 2006.

Several things can be noted from the above table:

- Hotel and 'parahotels' have been accounting for an increasing share of the visitor market.
- The devastating effect of the "River Plate Crisis" reduced the number of visitors in 2002 during the January – February high season to almost half of the peak year, resulted in a high number using their vehicles as accommodation and in a higher percentage using camping facilities.

- The percentage of visitors returning home after the Carnival performance has consistently fallen.
- The overall number of visitors in 2005[29] had not yet recovered to 1999 levels.

Table 12 shows the average number of visitors per day during January and February. It should be observed that the numbers of visitors around the weekend would be significantly higher and during the week significantly lower than the average.

Table 12
Gualeguaychú
Tourism Profile 1999, 2002 and 2005
January and February of each Year
Average Daily Number of Visitors in Gualeguaychú/Ñandubaysal

Type of Lodging	1999 (Nos.)	2002 (Nos.)	2005 (Nos.)	1999 %	2002 %	2005 %	2002 % Peak	2005 % Peak
Hotels/Parahotels	1,246	722	1,929	9.5	9.8	14.3	58.0	154.8
Other Paid	1,440	525	1,265	11.0	7.1	9.4	36.4	87.9
Friends/Relatives	813	542	1,097	6.2	7.4	8.1	66.7	135.0
Campsites	7,915	4,682	8,322	60.5	63.5	61.8	59.2	105.1
Stay in Vehicle	426	473	316	3.3	6.4	2.4	111.1	74.3
Return Home	1,238	428	540	9.5	5.8	4.0	34.5	43.7
Total Visitors	13,078	7,372	13,469	100.0	100.0	100.0	57.5	106.0

Source: Consultants' estimates based on Survey of Carnival Visitors by Estudio Fernandez Tesone., INDEC-SECTUR Survey of Hotel Occupancy 2004 and 2005 and Consejo Mixto Gualeguaychú Turismo Boletin No. 69, March 2006.

The above table is based on the number of visitor-days spent in the Gualeguaychú area. It can be seen that:

- The total number of visitors per day had in 2005 surpassed that of the peak year 1999.
- Campers make up nearly two-thirds of visitors in the Gualeguaychú area, on the average, during the high season.

Table 13 shows the estimated total expenditure of tourists during January and February in terms of 1993 Argentine pesos.[30]

[29] Nor in 2006, for which attendance was below that of 2005, as shown in Tables A9 and A10.
[30] A GDP deflator has been used to establish constant prices. This deflator can be found on the the website of the International Monetary Fund - www.imf.com

Table 13
Gualeguaychú
Tourism Profile 1999, 2002 and 2005
January and February of each Year
Estimates of Visitor Spending
(In thousands of Constant 1993 Argentine Pesos)

Spending by Type of Lodging	1999 (Nos.)	2002 (Nos.)	2005 (Nos.)	1999 %	2002 %	2005 %	2002 % Peak	2005 % Peak
Hotels/Parahotels	4,475	1,722	5,761	17.9	18.4	25.1	38.5	128.7
Other Paid	4,643	1,130	3,414	18.5	12.0	14.8	24.4	73.5
Friends/Relatives	1,412	629	1,595	5.7	6.7	6.9	44.5	112.9
Campsites	13,090	5,175	11,519	52.2	55.3	50.1	39.5	88.0
Stay in Vehicle	730	542	454	2.9	5.8	2.0	74.2	62.2
Return Home	708	163	259	2.8	1.8	1.1	23.1	36.5
Total Visitors	25,058	9,361	23,002	100.0	100.0	100.0	37.4	91.8

Source: Consultants' estimates based on Survey of Carnival Visitors by Estudio Fernandez Tesone., INDEC-SECTUR Survey of Hotel Occupancy 2004 and 2005 and Consejo Mixto Gualeguaychú Turismo Boletin No. 69, March 2006.

The following might be observed:

- In real terms visitor spending fell considerably in 2002 to 37% of the peak year 1999 and had recovered to 92% of the peak by 2005. In current Argentine pesos expenditures were AR$25.5 million, AR$12.4 million and AR$40.1 million for 1999, 2002 and 2005 respectively. In 2006 it is estimated that visitors spent about AR$43.4 million in January and February.
- Campsites provide over 50% of expenditures by visitors
- Expenditure by visitors in hotels and parahotels has been consistently increasing as a percentage of the total, reaching over 25% by 2005.

The estimated total expenditures in US dollars by tourists during January and February over the period 1997 – 2005 are shown in Annex Table 14. The full results for the same period are provide in the spreadsheet model, which is included as Annex Table 15.
To estimate the number of visitors, visitor-nights and expenditure for the period March – December 2005 a number of assumptions[31] were made:

- Outside of the peak January – February high season visitors stay mainly in hotels, parahotels and campsites
- Camping outside of the high season is essentially on weekends and therefore of relatively short duration
- Historical relationships between the number of campsites occupied in the high season and in the rest of the year remains valid

[31] Any of these assumptions can be changed as more information is made available and the results noted by using the worksheet tables.

- Daily expenditure by visitors in hotels, parahotels and campsite is the same as during the peak season

The number of visitors and visitor-nights was derived with reference to the INDEC-SECTUR Survey of Hotel Occupancy 2005, using the 2004 data to derive the monthly weighting for November and December 2005, which at the time of writing had not yet been reported.

From historical data it was found that on the average 26% of campsite nights were accounted for in the period March – December. This piece of information was used to calculate the number of campsite visitors, assuming that on the average 4 people occupied each lot.

Table A16 shows the Tourism profile for January – February 2005, Table A17 shows the same thing for March – December 2005 and Table A18 is a summation representing the profile for the entire year. Table 14 summarizes these results.

Table 14
Argentina
Gualeguaychú
Seasonal Profile of Tourism 2005

	Jan-Feb	Mar-Dec	Jan-Dec	Jan-Feb % Total
No. of Visitors	222,072	111,883	333,955	66.5
Visitor-Nights	808,162	214,134	1,022,297	79.1
Visitors per Day	3,701	367	915	404.5
Average length of Stay (Days)	3.6	1.9	3.1	116.1
Expenditure (AR$/Capita/Day)	50.21	68,36	54,01	93.0
Expenditure (AR$ millions)	40,574	14,638	55,212	73.5
Expenditure (US$/Capita/Day)	16.68	22,71	17,94	93.0
Total Expenditure (US$ millions)	13,480	4,863	18,343	73.5

Source: Consultants' estimates based on Survey of Carnival Visitors by Estudio Fernandez Tesone, INDEC-SECTUR Survey of Hotel Occupancy 2004 and 2005 and Consejo Mixto Gualeguaychú Turismo Boletin No. 69, March 2006.

The table demonstrates the overwhelming importance of the peak two months at the beginning of the year, but it also shows that Gualeguaychu is able to attract an average of about 367 visitors per day in the off-season, with heavy concentrations of visitors on most of the up to 9 long weekends.[32]

[32] Easter, Labor Day, 25 May, National Sovereignty Day, Flag Day, 9 July, San Martin's Birthday, Columbus Day, the Immaculate Conception Day, and Christmas. In recent years it has become more customary to celebrate at least some public holidays on Mondays or Fridays, one objective of which is to promote internal tourism.

The total expenditure of visitors was estimated to be AR$ 55 million or US$ 18 million. This can be compared to the entire output of the Gualeguaychú industrial estate, which is estimated to be about US$100 million per year.[33]

In conclusion, with the information available about carnival visitors and on lodging it was possible to build up a profile of tourism for Gualeguaychú. While many of the calculations depend on assumed relationships, it is felt the results represent a good approximation of the overall importance of the sector. Furthermore, the spreadsheet models have flexibility to allow expansion of information, for example historical availability year by year of beds or rooms, and changing of parameters or basic data, should they become available.

While the profile does provide an estimate of visitor spending, it does not give an accurate idea of the contribution of tourism to GDP. To do this would require surveys of a representative number of different types of tourist related operations in order to establish the relationship between sales and value of inputs. This is quite complicated because estimates have to be made of the percentage of business that relates directly to tourism, which varies considerably among enterprises.

Additionally, it is necessary to establish the tourism value added by each sector, as it is this that indicates the contribution to GDP and not the gross receipts or sales. In the hotel and restaurant sector it can be expected that value added, the output of firms less the inputs purchased from other firms or businesses, would be about half of the gross sales, but in the service sectors, value added can be as high as 80% of sales, although the percentage is very much influenced by the nature of the particular operation. Taking a value of 65% of gross sales to visitors as value added would imply a direct contribution of US$11.9 million in 2005 for tourism activities in Gualeguaychú.

Establishing the relationship between employment and activity in tourist-related operations requires detailed information on the relationship between output and fixed and variable labor inputs, which vary between types of operation. These would also require specific studies, particularly as there are large hebdomadal and seasonal variations, resulting in situations where some staff may be employed solely on weekends and/or during the high season. Many businesses ceased to operate during the off-season.

As studies of the impact of tourism on local economies have shown in countries like the United States, even with a good database, a considerable amount of survey work needs to be done in order to determine the precise contribution of tourism to the economy.

[33] El Dia, Special Supplement to celebrate 95 years of publishing, February 2006.

PART II. TOURISM PROFILE OF RIO NEGRO

Introduction

The tourism profile for Rio Negro is based to a large degree on annual and quarterly statistics prepared by the Ministry of Tourism and Sports for Uruguay and for the Littoral Region, which includes four departments bordering the Uruguay River: Rio Negro, Soriano, Paysandú, and Salto. It also incorporates the results of the 2001 tourist profile for Fray Bentos/Las Cañas, commissioned by the Government of Rio Negro, other information provided by the departmental government during and subsequent to a visit to Fray Bentos and from interviews with interested parties.

A great deal of information was obtained and this has been processed and is reported primarily in the annex tables, which facilitate further analysis of tourism in Uruguay, the Littoral Region and Rio Negro. The text is supported by a series of "snapshot" tables which show the high, low and average values for the 1st quarter, or the entire year, generally over a six year period, thereby providing an idea of the order of magnitude of each of the key variables (number of visitors, length of stay, expenditures), an indication of their variability and the relative importance by nationality, type of lodging utilized and destination within the country.

The approach consists of considering first the evidence on international tourism in Uruguay, examining its characteristics with emphasis on the nationality of visitors, destination within the country and the lodgings in which they stay. Of primary importance are the numbers of visitors, length of stay and expenditures in the country.

As tourism in Uruguay is highly seasonal, it is appropriate to examine tourism on a quarterly basis. The economic well being of the visitors, or potential visitors, particularly from Argentina, are a fundamental determinant of the fortunes of tourism in Uruguay, and there is considerable mention of this cyclical aspect. This is of special relevance as for an industry subjected to violent fluctuations, trying to determine, in the absence of direct evidence, representative values at any point of time for the number of visitors or tourist expenditure at the local level, is critically dependant on where in the cycle that point of time is located and in which quarter of the year.

More specific aspects of tourism in Rio Negro must be based on more subjective information, although with the advantage of the availability of reference material that can be used as a guide. For example, the 2001 tourist profile of Fray Bentos/Las Cañas was made during January and February of the year prior to the "River Plate Crisis", implying that any data related to volume of activity, would have to be modified accordingly in order to arrive at representative values for subsequent years.

Internal tourism in Uruguay, as in most countries in the world, is poorly documented and consequently the analysis has to rely on much anecdotal evidence, although the existence of the 2001 Fray Bentos survey, and other information, provide guidelines to estimate values for more recent years.

The Tourism Sector in Uruguay

Tourism in Uruguay is moderately important in terms of Gross Domestic Product (GDP), with expenditure of tourists being equivalent to between 2.5% and 3.7% of GDP in recent years. Contribution to the economy, being the sum of the valued added of tourist related businesses, would be rather less than this expenditure. In terms of exports and foreign exchange, tourism is of much greater significance tourist expenditures having reached 31% of goods exports in 1999. In 2004 tourist expenditures were about 17% of goods exported, reflecting both the relatively depressed tourism market and the recovery of exports, which by 2004 were at record levels in terms of US dollars.

As mentioned previously, cyclical variations are important features of the Uruguayan tourism sector. The 2002 River Plate Crisis resulted in a drastic reduction in tourism. In the year 1997 Uruguay had almost 2.5 million visitors, in 2002 this had fallen to 1.6 million, 55% of the peak year total. By 2005 there has been only a partial recovery in the fortunes of the sector, with 1.9 million visitors, who spent about US$540 million, considerably below the peak year record of US$827 million.[34] However, preliminary GDP and trade estimates for 2005 also indicate that tourist spending as a percentage of GDP was below the 2004 level and that tourism continues to lose importance in relation to goods exports. Table 15 provides a summary of data indicating the importance of tourism to the Uruguayan economy over the period 1995 –2005; more details can be found in Annex Table A19.

Table 15
Uruguay
Tourism Indicators
1995 – 2004

Year	Arrivals ('000s)	Expenditure/ Visitor (US$)	Arrivals Index 1997=100	Exp/Visitor Index 1997=100	Expenditures/ GDP (%)	Expenditures /Exports (%)
1995	2,177	281	88.3	83.6	3.2	28.4
1996	2,259	317	91.7	94.4	3.5	29.3
1997	2,463	336	100.0	100.0	3.8	29.6
1998	2,324	328	94.4	97.6	3.4	26.9
1999	2,273	310	92.3	92.3	3.4	30.7
2000	2,236	319	90.8	94.9	3.5	29.9
2001	2,136	286	86.7	85.1	3.3	28.5
2002	1,354	259	55.0	77.1	2.9	18.2
2003	1,508	229	61.2	68.2	3.1	15.6
2004	1,871	264	76.0	78.6	3.7	16.9

Source: Ministry of Tourism and Sports

[34] The 2005 data for tourist expenditure is not strictly comparable to the series developed in terms of national accounts; the latter includes imputed rents received by non-resident property owners.

The Uruguayan hotel and restaurant sector, an important contributor to the tourism sector, showed a much more marked decline during the recent crisis than the economy in general, partially reflecting its heavy reliance on tourism, with the drop in activity in 2002 and 2003 reaching 75% and 72%, respectively of the 1998 peak. The subsequent recovery in 2004 was to only 82% of the 1998 peak level. Significantly, the hotel and restaurant sector has been losing importance in the economy. Table 16, in constant Uruguayan pesos, summarizes the trends in the economy and in the hotel and restaurant sector over the period 1993 – 2004.

Table 16
Uruguay
Total Gross Domestic Product and Contribution of Commerce,
Hotels and Restaurants
(In millions of Uruguayan pesos of 1983)

Year	GDP	Hotels, Restaurants	H & R as % of GDP	GDP Index 1998=100	H & R Index 1998=100
1994	262.0	4.8	1.8	87.5	103.1
1995	258.2	4.6	1.8	86.3	98.2
1996	272.6	4.6	1.7	91.1	98.5
1997	286.3	4.8	1.7	95.7	102.9
1998	299.3	4.6	1.5	100.0	100.0
1999	290.8	4.6	1.6	97.2	99.6
2000	286.6	4.5	1.6	95.8	97.6
2001	276.9	4.2	1.5	92.5	91.0
2002	246.4	3.5	1.4	82.3	75.2
2003	251.7	3.3	1.3	84.1	72.2
2004	282.6	3.8	1.3	94.4	81.5

Source: Central Bank of Uruguay

Visitors to Uruguay by Nationality

Visitors from Argentina dominate Uruguayan tourism. In the peak year 1997, 1.6 million Argentines visited Uruguay, this had dropped to 813,000 in the crisis year 2002 and by 2005 it had recovered somewhat to 1.1 million, but was still well below the record year. To some degree Uruguay has been increasingly successful in attracting tourists of various nationalities and since 2003 less than 60% of tourist have been from Argentina. Increasing numbers of Brazilians, Chileans, Paraguayans, Europeans, North Americans and Asians are visiting Uruguay, as well as non-resident Uruguayans, who have emigrated to Argentina, Europe and North America. Nevertheless the number, length of stay and spending patterns of Argentine tourists are the predominant factor in the fortunes of the Uruguayan tourism sector. Table 17 summarizes the importance of Argentines to the tourist industry of Uruguay and Annex Table A20 provides more detailed information.

Table 17
Uruguay
Number of Argentine and Total Visitors

Year	Argentine Visitors (‘000s)	Other Visitors (‘000s)	Total Visitors (‘000s)	Argentine Visitors (% Total)	Argentine Visitors (% Peak Year)	Other Visitors (% Peak Year)
1995	1,478	699	2,177	67.9	92.2	81.3
1996	1,492	767	2,259	66.1	93.1	89.2
1997	1,603	860	2,463	65.1	100.0	100.0
1998	1,514	810	2,324	65.1	94.4	94.3
1999	1,533	740	2,273	67.4	95.6	86.1
2000	1,510	726	2,236	67.6	94.2	84.4
2001	1,479	658	2,136	69.2	92.2	76.5
2002	813	541	1,354	60.1	50.7	62.9
2003	867	642	1,508	57.5	54.1	74.6
2004	1,109	762	1,871	59.3	69.2	88.7
2005	1,108	810	1,917	57.8	69.2	94.3

Source: Ministry of Tourism and Sports

A high percentage of annual tourists visit Uruguay during January and February, with January typically being the peak month. In “normal” years almost half of Argentine visitors arrive during the 1st quarter. Table 18 highlights the variation in the number of visitors in the 1st quarter over the period 2000 – 2005 for selected nationalities, showing the high, low and average years during this period. From the table it can be seen that:

- The number of visitors from Argentina in the low year of the period was only 45% of the number in the high year.
- The total number of visitors in the low year was 53% of the number in the high year.
- On the average Argentines made up about 69% of total visitors.

Table 18
Uruguay
Number of Visitors by Nationality
1st Quarters 2000 – 2005
(‘000s)

Nationality	High Year[35]	Low Year	Average Year
Argentines	746	332	535
Non-Resident Uruguayans	118	80	97
Brazilians	57	35	43
Total	1,000	533	778

Source: Ministry of Tourism and Sports.

Annex Table 21 shows the number of visitors by nationality during the 1st quarters over the period 2000 – 2005 and the breakdown between nationalities.

From this annex table it can be deduced that:

- Although Argentines make up the dominant nationality, it is less so in more recent years
- The number of Brazilian visitors remained practically the same throughout the period of the River Plate Crisis and has increased substantially in 2004 and 2005, much of this due to the relative value of the Brazilian Real and the Uruguayan peso.
- Chilean visitors have steadily increased throughout the period with a large increase seen in 2004
- The percentage of Argentine visitors appears to be in decline, while the percentage of Brazilians, Chileans and Europeans appears to be rising.
- First quarter visits are proportionately greater for Argentines than for other nationalities.

Length of stay is not so volatile as the number of visitors seen in Table 19, which highlights the variation in the length of stay of visitors for selected nationalities, showing the high, low and average years during the 1st quarters of the period 2000 – 2005.

[35] Examining the relationship between the values in high, low and average years provides an indication of variability. The average year provides an indication of the relative importance of each key nationality in the total and the values provide an indication of order of magnitude.

Table 19
Uruguay
Visitors' Length of Stay by Nationality
1st Quarters 2000 – 2005
(Days)

Nationality	High Year	Low Year	Average Year
Argentines	9.3	7.8	8.5
Non-Resident Uruguayans	12.5	9.4	10.8
Brazilians	7.6	6.9	7.3
Total	9.7	8.5	9.0

Source: Ministry of Tourism and Sports

Table 19 shows the average length of stay for Argentines and other nationalities by quarter over the past six years. Annex Table 22 provides more information on the average length of stay by visitors of different nationalities, both for the 1st quarters and over the whole year, for the period 2000 – 2005. These tables show:

- Paraguayan, non-resident Uruguayan and European visitors remain in Uruguay for the longest periods of time, both during the 1st quarter and on average during each year.
- In 2005 visitors of all nationalities, except Europeans registered considerably longer average lengths of stay during the first quarter, the average being 9.1 days, as compared to 6.9 days for the entire year.
- Length of stay is consistently longer in the first quarter.
- Length of stay increased, for both Argentines and other nationalities as a group in 2002, the year of the crisis.
- Over the period 2000 – 2005 there is a discernable increase in the length of stay of Argentines and a decrease in the length of stay of other nationalities as a group.

Table 20
Uruguay
Average Length of Stay by Nationality
By Quarter
2000 – 2005
(In Days)

Year	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Total
Argentines					
2000	7.8	5.0	4.4	4.1	6.1
2001	7.8	4.1	4.3	4.5	6.1
2002	9.2	4.3	4.0	4.9	6.6
2003	9.3	5.4	5.1	4.8	6.7
2004	9.1	6.0	4.8	4.7	6.9
2005	8.7	4.9	4.6	4.6	6.6
Non-Argentines					
2000	11.4	7.1	6.7	6.1	8.2
2001	10.5	6.2	6.6	5.8	7.7
2002	10.3	6.5	6.2	7.5	7.9
2003	10.4	6.7	7.0	6.3	7.7
2004	9.3	6.1	5.6	6.1	7.0
2005	10.0	7.9	5.7	5.6	7.4

Source: Ministry of Tourism and Sports

Table 21 highlights the expenditures by visitors for selected nationalities for the high, low and average years during the period 2000 – 2005.

Table 21
Uruguay
Expenditures by Visitors by Nationality
1st Quarters 2000 – 2005
(US$ millions)

Nationality	High Year	Low Year	Average Year
Argentines	259	78	160
Non-Resident Uruguayans	43	14	19
Brazilians	21	10	16
Total	377	132	263

Source: Ministry of Tourism and Sports

Annex Table A23 provides details of the visitor expenditure patterns in US dollars by nationality over this period and also shows calculations of the percentage of expenditure occurring during the 1st quarter of each year. The annex table shows:

- The overwhelming, though declining, proportion of expenditure by Argentine visitors.
- The large decline in the importance of 1st quarter as a proportion of annual expenditure in 2003 following the crisis, with some subsequent recovery.

- The drastic drop in annual expenditure by Argentines in 2002.

Table 22 highlights the daily expenditures by visitors for selected nationalities for the high, low and average years during the period 2000 – 2005.

Table 22
Uruguay
Daily Expenditures Per Visitor by Nationality
1st Quarters 2000 – 2005
(US$)

Nationality	High Year	Low Year	Average Year
Argentines	44.41	25.25	34.16
Non-Resident Uruguayans	28.92	17.38	22.97
Brazilians	58.54	36.39	49.85
Total	43.29	26.33	34.99

Source: Ministry of Tourism and Sports

Annex Table 24 examines the expenditure in US dollars per visitor and per visitor day by nationality for the 1st quarters and the entire years 2000 – 2005. The annex table shows:

- In 2005 visitors to Uruguay spent an average of US$282 per visit, equivalent to US$40.80 per day.
- In the same year the average first quarter visitor spent US$338 per visit, equivalent to US$37.09 per day. Reasons for the lower daily per capita expenditure in the 1st quarter would include the larger number of children visiting in the first quarter, when schools are not in session and, as will be seen below, the larger proportion of campers.
- Non-resident Uruguayans and Argentines have the lowest daily per capita expenditures; Europeans and North Americans have the highest.
- Expenditure per visit and daily expenditure fell dramatically in 2003, reflecting in part the cheaper prices in US$, following the large devaluation of the Uruguayan peso in July 2002 and also a reduction in spending by visitors.

Visitors to Uruguay by Type of Lodging

Table 23 provides a "snapshot" of the number of visitors by lodging over the period 2000 – 2005.

Table 23
Uruguay
Number of Visitors by Type of Lodging
1st Quarters 2000 – 2005
('000s)

Lodging	High Year	Low Year	Average Year
Hotels	207	93	159
Rented Houses	156	70	110
Camping	57	17	30
Own House	113	69	99
Friends and Family	296	198	243
Total	1,000	519	755

Source: Ministry of Tourism and Sports

Annex Tables 25 and 26 indicate the number of visitors by type of lodging over the period 1996 – 2005 and during 1st quarters over the period 2000 – 2005. The tables show that:

- The economic crisis of 2002 hit campers the hardest, with visitors in this category falling in that year to just 27% of the number of visitors in the peak year 1997, and by 2005 there had only been a recovery to 33% of peak.
- The number of visitors in hotels and in rented houses also fell dramatically in 2002, to 49% and 45% of the 1997 level, respectively. But unlike camping there has been partial recovery in both these categories, by 2005 to 91% and 78% of the 1997 level for hotels and rented houses, respectively, although visitors in rented houses had reached 82% of the peak year in 2004, falling back in 2005.
- The number of campers fell from almost 5% of total visitors in 1996 to only 1.6% in 2004 and 2005.
- Over the past ten years on the average about 41% of visitors stayed with friends and family, 26% in hotels and about 11% in their own house.
- In "normal" years the 1st quarter accounted for about 45% of visitors. With the crisis this dropped to 35% by 2003 and recovered to about 41% in 2005.
- The first quarter is the most important for rented housing, with 79% of those renting houses visiting in the first quarter in 2000, this subsequently dropped to 65% in 2003, before recovering to 71% in 2005.
- Most international campers also visit during the 1st quarter, in 2000 this quarter accounted for 74% of the year and, although falling to 57% of the year in 2003, it recovered to 73% by 2005.

Table 24 provides a "snapshot" of visitors' average length of stay number by type of lodging over the period 2000 – 2005, from which it can be observed that:

- There is not too much variability in the length of stay over the period
- Houses are usually rented for two-week periods and campers and visitors who use hotels usually stay for a week.
- Visitors with their own houses tend to stay for the longest periods.

Table 24
Uruguay
Visitors' Length of Stay by Type of Lodging
1st Quarters 2000 – 2005
(Days)

Lodging	High Year	Low Year	Average Year
Hotels	6.0	5.0	5.4
Rented Houses	13.4	12.5	12.8
Camping	8.5	6.4	7.2
Own House	20.3	18.4	19.2
Friends and Family	10.6	8.9	9.6
Total	9.7	8.5	9.0

Source: Ministry of Tourism and Sports

Annex Table 27 shows more details. The annex table shows:

- For all categories of lodgings in 2005 visitors stayed longer in the first quarter, more particularly those using their own house and hotels.
- In 2005 campers stay for marginally more than a week during the 1st quarter, about a week in the 4th quarters and slightly less during the rest of the year.

Table 25 provides a "snapshot" of visitors' expenditure by type of lodging over the period 2000 – 2005, from which it can be observed that:

- There were huge differences between visitors' expenditures in high and low years in all categories.
- Visitors who camp show the most variability and by far the lowest absolute expenditure as a group.
- The proportion of expenditures are relatively similar for visitors renting houses, staying in hotels and in their own houses and for those staying with friends and family.

Table 25
Uruguay
Visitors' Expenditure by Type of Lodging
1st Quarters 2000 – 2005
(US$ '000,000s)

Lodging	High Year	Low Year	Average Year
Hotels	80.1	27.1	55.9
Rented Houses	100.0	28.6	60.6
Camping	10.8	1.6	4.5
Own House	96.5	34.8	56.9
Friends and Family	83.8	34.8	57.5
Total	377.4	132.4	244.3

Source: Ministry of Tourism and Sports

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Annex Table 28 provides more detail on expenditure by type of lodging, in which it can be seen that:

- There are quite large variations in the percentage of annual expenditures in the 1st quarter: in 2000 this was 58%; in 2003 it was only 42%.
- For some categories the 1st quarter share of annual expenditures is very large: 87% on the average for those in rented houses and 74% for campers.
- For other categories the 1st quarter share of annual expenditure is less marked: only 41% for visitors in hotels and 35% for those staying with friends and families.

Table 26 provides a "snapshot" of visitors' daily expenditure by type of lodging over the period 2000 – 2005, from which it can be observed that:

- Average daily expenditure is highest for those staying hotels and lowest for campers.
- Visitors staying in hotels showed the largest absolute difference between daily expenditure in the high and low years.
- Campers had the largest percentage difference between the low and high years; in the former spending less than half the amount spent in the latter year.
- The overall average expenditure for visitors during this period was US$34.91 per day.

Table 26
Uruguay
Daily Expenditure Per Visitor by Lodging
1st Quarters 2000 – 2005
(US$)

Lodging	High Year	Low Year	Average Year
Hotels	75.69	48.43	63.67
Rented Houses	49.61	30.88	40.91
Camping	26.44	12.45	18.92
Own House	44.09	26.07	31.29
Friends and Family	29.98	18.45	24.61
Total	43.10	26.27	34.91

Source: Ministry of Tourism and Sports

Annex Table 29 provides more detail for full years and 1st quarters over the period 2000 – 2005 on expenditure per visit and per day by type of lodging, in which it can be seen that:

- 1st quarter spending per visit was higher than the overall annual average in all categories.
- 1st quarter spending per visitor – day was higher than the overall annual average in only two of the six years.

- Only visitors staying in rented houses showed per day expenditures consistently higher or equal to the annual average; on the other hand, for none of the categories of lodging was 1st quarter spending below the annual average in every year.
- However, those not staying in lodgings, predominantly day visitors, showed lower daily expenditure relative to annual average expenditure in the 1st quarter in every year.

Visitors to Uruguay by Principal Destination

The behavior pattern of visitors was also examined by final destination within Uruguay. Table 27 shows, for the high, low and average years over the period 2000 – 2005, the number of visitors for selected principal destinations, including the Littoral Region, in which Rio Negro is located. From this table it can be observed that:

- The Littoral Region accounted for about 12% of Uruguay's visitors over period.
- The Littoral Region and Colonia, located opposite Buenos Aires, showed the greatest amount of variation in the number of 1st quarter visitors.

Table 27
Uruguay
Number of Visitors by Principal Destination
1st Quarters 2000 – 2005
('000s)

Destination	High Year	Low Year	Average Year
Punta del Este	288	187	240
Colonia	53	21	36
Montevideo	178	99	139
Littoral	145	58	91
Total	1,000	519	778

Source: Ministry of Tourism and Sports

Annex Table A30 shows the annual number of visitors to Uruguay by principal destination during the period 1995 – 2005 and Table A31 provides this information for the first quarter of each year over the period 2000 – 2005 These tables indicate that:

- Over the past ten years the Littoral Region has received between 11% and 19% of the annual visitors, with the average being 14.6% of visitors with known destinations within the country. On the average, the region received in excess of one quarter of a million international visitors.
- On the average only 36% of visits occurred in the first quarter, reflecting the success that the thermal spas, located in Paysandú and Salto, in the north of the region, have had in attracting international visitors throughout the year.

Table 28 provides a "snapshot" of the patterns of length of stay of visitors to Uruguay by principal destination. From this table it may be observed that:

- The length of stay for visitors to the Littoral Region is considerably less than for other regions, except for neighboring Colonia.
- There is not much variation from year to year in the length of stay, for all Uruguayan destinations. The two weekly and the weekly visits have a long tradition, particularly among residents of the Buenos Aires area.

Table 28
Uruguay
Length of Stay by Visitors by Principal Destination
1st Quarters 2000 – 2005
('000s)

Destination	High Year	Low Year	Average Year
Punta del Este	14.0	12.9	13.6
Colonia	7.1	5.1	6.4
Montevideo	9.3	7.9	8.6
Littoral	5.5	4.5	4.9
Total	9.7	8.5	9.0

Source: Ministry of Tourism and Sports

Annex Table A32 provides further information on the length of stay by principal destination, where it can be seen that:

- Length of stay in the 1st quarter exceeds that of any other quarter for all destinations.
- For the Littoral Region length of stay in 2005 was the longest of any year in the period.

Table 29 provides a "snapshot" of visitors' expenditure by principal destination over the period 2000 – 2005, from which it can be observed that:

- There were huge differences between visitors' expenditures in high and low years for all destinations.
- Visitors to Colonia and to the Littoral Region show the most variability in expenditure patterns.
- Expenditures by 1st quarter visitors to the Littoral Region make up only about 3.7% of the total, the second lowest of any major tourist region in the country.

Table 29
Uruguay
Expenditure by Visitors by Principal Destination
1st Quarters 2000 – 2005
(US$‘000,000s)

Destination	High Year	Low Year	Average Year
Punta del Este	220	85	146
Colonia	12	3	7
Montevideo	57	22	40
Littoral	17	4	7
Total	377	132	263

Source: Ministry of Tourism and Sports

Annex Table 33 provides more detail on expenditure by destination, in which it can be seen that:

- There are quite large variations in the percentage of annual expenditures in the 1st quarter for the Littoral Region: in 2000 this was 42%; in 2003 it was only 28%. The 1st quarter is particularly important for tourism in Rio Negro.
- The Littoral Region accounted for as much as 7.5% of the total of visitors' spending in 2001; this had fallen to 4.2% in 2005.

Table 30 provides a "snapshot" of visitors' daily expenditure by destination over the period 2000 – 2005, from which it can be observed that:

- Average visitor daily expenditure for the Littoral Region in the first quarters is the lowest among Uruguayan tourist destinations.
- Visitors staying in the Littoral Region showed the second largest percentage difference between daily expenditure in the high and low years.

Table 30
Uruguay
Daily Expenditure per Visitor by Principal Destination
1st Quarters 2000 – 2005
(US$)

Destination	High Year	Low Year	Average Year
Punta del Este	54.65	33.18	43.59
Colonia	37.22	18.22	28.36
Montevideo	37.30	25.72	32.86
Littoral	25.88	14.93	20.26
Total	43.15	26.26	34.89

Source: Ministry of Tourism and Sports

Annex Table 34 provides more detail for full years and 1st quarters over the period 2000 – 2005 on expenditure per visit and per day by destination, in which it can be seen that:

- On both a yearly basis and for the 1st quarters, average spending per visit and per day fell with the crisis and although there has been some recovery spending is still well below the 2001 level.
- Spending per visitor is highest in the 1st quarter of each of the year 2000 – 2005.
- In the last three years spending per capita has been highest in the 2nd, 3rd and 4th quarters, during which visiting tends to be predominantly at the thermal spas.

Breakdown of International Visitors' Expenditure

A breakdown has been made of visitors' expenditures by year, and a summary is provided in Table 31, where it can be seen that:

- Food accounts for about 32% of total expenditure and transport and others for another 30%.
- The highest amount of variation is seen in the category "purchases" and the lowest amount of variation is for food.

Table 31
Uruguay
Breakdown of Expenditure by Visitors
2000 – 2005
(US$ '000,000s)

Breakdown	High Year	Low Year	Average Year
Lodging	127	51	93
Food	234	106	152
Purchases	127	48	85
Transport and Others	190	93	143
Total	652	315	473

Source: Ministry of Tourism and Sports

Annex Tables A35 through A37 show a summary of the breakdown of expenditure for the 1st quarters, for each year and for 2005, respectively. The tables suggest that:

- The 1st quarter accounted for over half of expenditures on hotels and "transport and others" in 2005. In 2000 and 2001 the 1st quarter accounted for over 50% of annual expenditures in all categories.
- Expenditure on food, which had reached US$15 per day in 2000, was still only at $US10 per day in 2005, some of this accounted for the fall in the price of food in US dollars in restaurants subsequent to the devaluation of the Uruguayan peso in July 2002.

Tourism in the Littoral Region of Uruguay

The Ministry of Tourism and Sports has produced information on the number of visitors and length of stay in the Littoral Region. Table 32 shows the number of visitors to the region by quarter. Of note are the following:

- In the crisis year 2002 the Littoral Region suffered a loss in market share for visitors to Uruguay from about 15% in 2000 to 13% in 2002.
- This trend continued through 2005 and applied to every quarter of the year.
- By 2005 the Region only attracted about 11% of visitors to Uruguay and only 10.5% in the 1st quarter, of particular importance to Fray Bentos/Las Cañas.

Table 32
Uruguay
Number of International Visitors to the Littoral Region
By Quarter
2000 – 2005
('000s)

Year	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Total
2000	144.5	54.3	59.8	98.9	327.6
2001	132.0	79.3	65.5	66.8	343.6
2002	57.7	38.5	38.2	47.1	181.6
2003	57.5	37.9	46.4	54.8	196.7
2004	74.7	49.3	42.3	54.2	220.5
2005	81.4	36.1	47.5	52.8	217.7
Littoral Region as % of Uruguay					
2000	14.5%	15.5%	17.2%	12.8%	14.7%
2001	13.5%	21.4%	19.5%	14.7%	16.1%
2002	10.8%	16.5%	15.3%	14.0%	13.4%
2003	11.1%	15.0%	16.3%	12.1%	13.0%
2004	10.3%	15.9%	13.3%	10.5%	11.8%
2005	10.5%	13.2%	13.9%	10.0%	11.4%

Source: Ministry of Tourism and Sports

Table 33 provides a "snapshot" of the number of visitors by nationality for the 1st quarters of the period 2000 – 2005. The table shows that:

- The number of Argentine visitors in the low year represented only 34% of the visitors in the high year.
- On the average Argentine visitors over the period 2000 – 2005 accounted for about 78% of total international visitors to the Littoral Region.

Table 33
Littoral Region[36]
Number of Visitors by Nationality
1st Quarters 2000 – 2005
('000s)

Nationality	High Year[37]	Low Year	Average Year
Argentines	116	40	71
Non-Resident Uruguayans	16	10	12
Brazilians	11	4	6
Total	145	58	91

Source: Ministry of Tourism and Sports.

Annex Table 38 shows the number of visitors by nationality during the 1st quarters over the period 2000 – 2005 and the breakdown between nationalities.

From this annex table it can be deduced that:

- Argentines on the average accounted for 76% of visitors to the Region, falling to about 70% in 2002 from 83% a year earlier. By 2005 74% of visitors were Argentines. .
- Expatriate Uruguayans are the next largest block by nationality making up about 14% of the total. Their market share went up from 12% in 2001 to 17% in 2002; in 2005 it stood at 14%.
- The other important national group of visitors to the Region is Brazilians, who accounted for about 7% over the period. The number of Brazilian visitors fell by half from 2000, when the Brazilian currency was devaluated, but there has since been a partial recovery, accounting for 10% of the Regional market in 2005.
- There are few visitors to the Region from other countries.

Table 34 highlights the variation in the length of stay of visitors in the Littoral Region for selected nationalities, showing the high, low and average years during the 1st quarters of the period 2000 – 2005. The table shows that:

- Length of stay is not so volatile from year to year as the number of visitors.
- Uruguayans and Brazilians remain in the Region for longer periods, on the average, than Argentines.
- The average number of visitor-days in the Region is substantially less than the average for the country.

[36] The Littoral Region comprises the Uruguayan Departments of Rio Negro, Soriano, Paysandú and Salto.
[37] Examining the relationship between the values in high, low and average years provides an indication of variability. The average year provides an indication of the relative importance of each key nationality in the total and the values provide an indication of order of magnitude.

Table 34
Littoral Region
Visitors' Length of Stay by Nationality
1st Quarters 2000 – 2005
(Days)

Nationality	High Year	Low Year	Average Year
Argentines	5.2	3.9	4.6
Non-Resident Uruguayans	7.4	5.0	6.2
Brazilians	6.9	4.0	5.0
Total	5.5	4.5	4.9

Source: Ministry of Tourism and Sports

Annex Table 39 provides more information on the average length of stay by visitors of different nationalities, both for the 1st quarters and over the whole year, for the period 2000 – 2005. This table shows:

- Chilean, Paraguayan, non-resident Uruguayan and European visitors remain in Uruguay for the longest periods of time, both during the 1st quarter and on average during each year.
- In 2005 visitors of all nationalities registered longer average lengths of stay during the first quarter than in any other quarter, the average being 4.9 days, as compared to 4.2 days for the entire year.

Table 35 provides a "snapshot" of the number of visitors by lodging over the period 2000 – 2005.

Table 35
Littoral Region
Number of Visitors by Type of Lodging
1st Quarters 2000 – 2005
('000s)

Lodging	High Year	Low Year	Average Year
Hotels	36	12	22
Rented Houses	24	7	15
Camping	31	9	16
Own House	5	2	3
Friends and Family	31	18	22
Total	145	58	91

Source: Ministry of Tourism and Sports

Annex Table 40 records the number of visitors by type of lodging over the period 2000 – 2005. This table shows:

- The economic crisis of 2002 hit campers the hardest, with visitors in this category falling in that year to just 28% of the number of visitors in 2000, and by 2005 there had only been a recovery to 36% of peak.

- The number of visitors in hotels and in rented houses also fell dramatically in 2002, to 35% and 30% of the number in 2000, respectively. But unlike camping there has been partial recovery in both these categories, by 2005 to 66% of 2000 values for hotels and 68% for rented houses, respectively.
- The number of campers fell from almost 22% of total visitors in 2000 to 14% in 2005.
- Over the past six years on the average about 27% of visitors to the Littoral Region stayed with friends and family, 24% in hotels and about 4% in their own house.
- In "normal" years the 1st quarter accounted for about 44% of visitors. With the crisis this dropped to 29% by 2003 and recover to about 37% in 2005.
- The first quarter is the most important for rented housing, with 51% of those renting houses visiting in the first quarter in 2000, this subsequently dropped to 30% in 2003, before recovering to 42% in 2005.
- Most international campers also visit during the 1st quarter, in 2000 this quarter accounted for 69% of the year and, although falling to 48% of the year in 2003, it recovered to 67% by 2005.

The Littoral Region is the principal destination of a high percentage of campers visiting Uruguay. Table 36 shows the importance of camping to the Region and it can be observed that:

- The number of campers both for Uruguay and for the Littoral Region has fallen dramatically since 2001 and shows no real signs of recovery.
- The Littoral Region is in danger of losing its place as the leading destination in Uruguay for international campers.

Table 36
Uruguay
Number of International Campers
2000 –2005
('000s)

	Littoral Region			Uruguay			
	Campers ('000s)	Visitors ('000s)	Campers/ Visitors (%)	Campers ('000s)	Visitors ('000s)	Campers/ Visitors (%)	Campers Littoral/ Uruguay (%)
2000	45.3	327.6	13.8	77.3	2,235.9	3.5%	58.6%
2001	46.3	343.6	13.5	66.7	2,136.4	3.1%	69.4%
2002	15.2	181.6	8.4	25.7	1,353.9	1.9%	59.1%
2003	19.1	196.7	9.7	29.2	1,508.1	1.9%	65.4%
2004	17.9	220.5	8.1	30.7	1,870.9	1.6%	58.3%
2005	16.5	217.7	7.6	31.3	1,917.0	1.6%	52.7%

Table 37 provides a "snapshot" of visitors' average length of stay by type of lodging over the period 2000 – 2005, from which it can be seen that:

- There is not too much variability in the length of stay over the period
- Houses are usually rented for one-week periods, campers stay for about a week and hotel visitors for slightly less than a week.
- Visitors with their own houses tend to stay for the longest periods.

Table 37
Littoral Region
Visitors' Length of Stay by Type of Lodging
1st Quarters 2000 – 2005
(Days)

Lodging	High Year	Low Year	Average Year
Hotels	5.0	3.4	4.2
Rented Houses	6.9	5.2	6.1
Camping	7.4	4.8	5.7
Own House	13.2	5.7	9.1
Friends and Family	6.2	4.6	5.3
Total	5.5	4.5	5.0

Source: Ministry of Tourism and Sports

Annex Table 41, which shows more details, suggests that:

- For all major categories of lodgings in 2005 visitors stayed longer in the first quarter, more particularly those using their own house and hotels.
- In 2005 campers stayed for marginally more than a week during the 1st quarter, about a week in the 4th quarters and slightly less during the rest of the year.

Information was obtained on the distribution of international visitors to the Littoral Region by primary destination. However, this information only starts with crisis year 2002 during which the total number of visitors represented only about 55.4% of those in 2000.

The results are shown in Table 38, where it can be seen that:

- The two most important destinations are Fray Bentos/Las Cañas and Dayman Thermal Spas.
- About 31% of the total international visitors to the Region had Fray Bentos as their principal destination.
- The relatively high numbers visiting Paysandú are likely to be predominantly day-trippers; there are many close family ties between Paysandú and Colón in Argentina.

Table 38
Uruguay
Visitors to the Uruguay River Region 2002 – 2005
By Primary Destination
('000s)

Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos/Las Cañas	61.8	61.1	68.0	61.9
Paysandú	Paysandú	24.8	24.1	26.9	28.2
	Guaviyú Thermal Spas	9.3	11.6	12.0	14.3
Salto	Arapey Thermal Spas	12.2	18.9	21.1	23.2
	Dayman Thermal Spas	52.8	62.6	70.8	68.9
Soriano	Mercedes			16.3	19.1
Others	Others	11.7	15.3	5.3	2.2
Unknown	Unknown	9.0	4.0	0.1	
Total	Total	181.6	197.7	220.5	217.7
Percentage Distribution					
Rio Negro	Fray Bentos/Las Cañas	34.0%	30.9%	30.8%	28.4%
Paysandú	Paysandú	13.7%	12.2%	12.2%	13.0%
	Guaviyú Thermal Spas	5.1%	5.9%	5.4%	6.6%
Salto	Arapey Thermal Spas	6.7%	9.6%	9.6%	10.7%
	Dayman Thermal Spas	29.0%	31.7%	32.1%	31.6%
Soriano	Mercedes			7.4	8.8
Others	Others	6.5%	7.7%	2.4%	1.0%
Unknown	Unknown	5.0%	2.0%	0.1%	
Total	Total	100.0%	100.0%	100.0%	100.0%

Source: Ministry of Tourism and Sports

A more complete presentation of the number of visitors by destination within the Littoral Region is found in the annex tables. Tables A42 through A45 show respectively: the number of international visitors by quarter; the percentage of visitors for each destination; the number of visitors to each destination by quarter for each year relative to 2002; and the percentage of visitors by quarter to each destination. Tables A46 through A49 show the same information by year.

<u>Tourism in Fray Bentos/Las Cañas</u>

There are a number of different tourist facilities in Rio Negro, including 4 hotels in Fray Bentos with a capacity of 264 beds and bungalows, private houses and motels in Las Cañas, with an estimated capacity of about 1000 beds. In addition, hotels and motels in San Javier, Nuevo Berlin and Young provide an additional 150 beds. There are various camping grounds in the Department, complete with facilities, the largest of which is Las Cañas, where there is space for 2,500 tents, or about 10,000 persons. Prior to the crisis of 2002, it was common in early January and on the Carnival weekend to have capacity occupancy. There are also about 350 private houses in Las Cañas, mostly owned by Argentines, many of which are rented out to visitors, particularly during January and February.

Table 39 shows the number of international visitors to Fray Bentos/Las Cañas by quarter. It can be seen that:

- The first quarter of each year accounts for the most visitors – 44% on the average.
- The percentage of visitors in the first quarter increased steadily as tourism recovered from the crisis year 2002.
- The fourth quarter with about a 25% annual share, had the second highest number of visitors.

Table 39
Fray Bentos/Las Cañas
Number of International Visitors by Quarter
2002 - 2005

Quarter	2002	2003	2004	2005	Average
First	24,506	25,369	30,718	29,517	27,528
Second	8,250	9,955	14,810	7,430	10,106
Third	10,783	9,743	8,874	10,175	9,894
Fourth	18,217	16,050	13,607	14,797	15,668
Total	61,756	61,117	68,009	61,919	63,195
Distribution by Quarter					
First	39.7%	41.5%	45.2%	47.7%	43.8%
Second	13.4%	16.3%	21.8%	12.0%	16.0%
Third	17.5%	15.9%	13.0%	16.4%	15.7%
Fourth	29.5%	26.3%	20.0%	23.9%	24.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Ministry of Tourism and Sports

In 2001 a tourist profile survey was carried out for the Government of Rio Negro in which about 400 adults, selected by random sampling methods, were interviewed at four separate times during January and February of that year. The results of this survey provides information on a variety of subjects including point of origin of visitors and the type of lodging used, complement the information from the Ministry of Tourism and Sport, reported above and in the annex tables. The results of the survey on lodging are summarized in Table 40, where it can be seen that:

- There are substantial variations in the results according to the date of the survey. The percentage of campers, for instance, increases until the first week of February and decreases thereafter.
- Campers are the most important segment of the lodging market, representing an average of about 43% of respondents.
- Rented houses are the next most important form of lodging, higher in February than in January. Visitors living in their own houses are a relatively small group, but significantly higher in January than in February. There are about 350 houses in Las Cañas and it appears that some owners occupy their own houses during January and rent them out during February.

- Visitors staying with friends and family are a small percentage of the total, but in the last week of the survey represented about 11%, well up from previous weeks.
- Hotels and motels accounted for only about 10% of total lodging.

Table 40
Uruguay
Visitors to Fray Bentos January – February 2001
By Type of Lodging, By Survey Date
(Percentage Distribution)

Lodging	20 & 21 Jan	3 & 4 Feb	17 & 18 Feb	25 & 26 Feb	Average
Hotel/Motel	10.3%	11.0%	9.9%	6.7%	9.5%
Rented House	25.1%	22.8%	38.1%	36.5%	30.7%
Camping	44.7%	50.4%	41.9%	34.5%	42.8%
Own House	4.5%	4.5%	1.5%	2.7%	3.3%
Friends/Family	2.8%	3.3%	3.6%	11.1%	5.2%
Others	12.6%	8.0%	5.1%	8.6%	8.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Ricardo Laurenz et al. Tourist Profile for Fray Bentos/Las Cañas, 2001.

The 2001 survey includes tables, which identify the country of origin and the department or province of origin of visitors. This is important evidence as there is a scarcity of information about internal tourism in Uruguay, which as in most countries, is imperfectly documented. The results by country of origin are shown in Table 41, where it can be seen that:

- About three quarters of visitors are from Argentina and almost one quarter from Uruguay, with only a very small percentage of visitors from other countries.
- The percentage of visitors from Argentina is highest at the beginning of the year and tapers off in February.
- The percentage of Uruguayans is highest in February reaching over 35% of the total in the survey at the end of that month.

Table 41
Uruguay
Visitors to Fray Bentos
January – February 2001
By Country of Origin, By Survey Date
(Percentage Distribution)

Lodging	20 & 21 Jan	3 & 4 Feb	17 & 18 Feb	25 & 26 Feb	Average
Uruguay	17.3%	18.6%	23.9%	35.5%	23.9%
Argentina	82.2%	80.7%	75.7%	64.3%	75.7%
Brazil			0.2%	0.3%	0.1%
Chile	0.3%				0.1%
Paraguay	0.3%	0.3%			0.1%
Others		0.5%	0.2%		0.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Ricardo Laurenz et al. Tourist Profile for Fray Bentos/Las Cañas, 2001.

The percentage breakdown of all visitors, international and domestic, by department or province of origin are shown in Table 42, where it can be seen that:

- Visitors from the Littoral Region account for about 15% of the total, from Montevideo about 4% and from other parts of Uruguay about 6%.[38]
- Local visitors from Rio Negro are a greater proportion at the beginning of the quarter than at the end. Other Uruguayans have a stronger presence in February.
- About 15% of total visitors were from Entre Rios and about 56% from Buenos Aires.

Table 42
Uruguay
Visitors to Fray Bentos January – February 2001
By Department or Province of Origin, By Survey Date
(Percentage Distribution)

Dept/Prov.	20/21 Jan	3/4 Feb	17/18 Feb	25/26 Feb	Average
Rio Negro	5.5%	3.8%	3.9%	3.2%	4.1%
Other Littoral	7.8%	8.0%	12.1%	14.0%	10.5%
Montevideo	3.5%	3.8%	3.1%	7.1%	4.4%
Other Uruguay	3.8%	6.0%	3.8%	11.1%	6.2%
Total Uruguay	20.6%	21.6%	22.9%	35.5%	25.1%
Buenos Aires	59.3%	53.4%	60.2%	49.8%	55.7%
Entre Ríos	13.8%	20.8%	12.3%	11.8%	14.7%
Other Argentina	0.8%	1.3%	0.5%	0.8%	0.8%
Total Argentina	73.9%	75.4%	73.0%	62.3%	71.2%
Others	5.5%	3.0%	4.1%	2.2%	3.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

[38] The slight inconsistency with the preceding table is probably due to responses by the non-resident Uruguayans, who may have been interpreting the question on origin to mean place of birth rather than place of residence and the inclusion of 'others" in Table 42, which seems to include places of origin in Argentina.

Source: Lic. Ricardo Laurenz et al. Tourist Profile for Fray Bentos/Las Cañas, 2001.

Annex Table 50 provides more detail on the information contained in Table 42.

There is no time series of the number of international visitors to Fray Bentos/Las Cañas by type of lodging. This is important to know in order to refine estimates of expenditure, which tends to vary significantly with the type of lodging, used, and for which information exists at the national level.

As previously indicated, data is available for the total number of international visitors to Fray Bentos over the period 2002 - 2005, and the number of visitors by type of lodging for the entire Littoral Region for the period 2000 - 2005. To refine the estimates of expenditure of visitors to Fray Bentos/Las Cañas, therefore, it was assumed that the percentage breakdown of the number of visitors by type of lodging was the same for Fray Bentos as for the Region. This assumption can be justified on the grounds that Fray Bentos made up a sizeable percentage of the number of international visitors to the Region, on the average about 31%, so that the regional breakdown will, to some degree, reflect the breakdown for Fray Bentos.

The breakdown by type of lodging for 2000 and 2001 was taken from the 2001 Survey of visitors to Fray Bentos, which covered both international and domestic visitors, and an assumption was made that both categories of visitor have similar preferences with regards to the type of lodging used.

The results of these calculations are shown in Annex Tables A51 and A52. The following can be observed from examining these tables:

- In 'normal" years visitors choose camping as the preferred lodging, followed by rented houses. Hotels are less important.
- 1st quarter international visitors for camping and renting houses fell off significantly in 2002, with campers only accounting for 28% of their 2000 numbers, and rented houses about 30% of the earlier year during the key first quarter.
- By 2005 the number of camping visitors was still only 36% of the 2000 level, whereas rented houses had risen to 68%.

The fortunes of camping are particularly important for the Government of Rio Negro, which charges campers and visitors using other accommodation for entry into Las Cañas, which has the largest camping site in the Department.[39]

Information was provided by the Municipality on the income received for entry into the resort area. The data on receipts from payments for entry are shown in Table 43 in US dollars and in Table A53 in Uruguayan pesos, where it can be noted that:

[39] The charges do not apply to visitors from within the Department of Rio Negro.

- In terms of constant Uruguayan pesos, revenues in 2002 fell to less than one third of their 2000 level.
- Camping was the most affected, with the 2003 revenues being only 6% of the 2000 level.
- Whereas in 2000 camping accounted for 64% of the revenues, in the latest season 2006, the share from camping was only 35%.

Table 43
Municipality of Fray Bentos
Income from Las Cañas
Thousands of current US Dollars

Year	Camping	Motels	Other	Total
2000	192	93	17	302
2001	178	72	17	267
2002	42	37	10	83
2003	17	13	2	33
2004	32	29	5	66
2005	44	38	6	88
2006	17	28	4	50

Source: Municipality of Rio Negro, using end of January interbank selling rates.

Using the estimates of the number of international visitors, and assuming the same length of stay by type of lodging as recorded for the Littoral Region, it was possible to arrive at estimates of the expenditure by international visitors for each quarter of each year over the period 2000-2005. A worksheet accompanies this report, formatted as 132 individual tables, which shows these calculations and, in addition, provides estimates of the breakdown of international visitor spending for: lodging, food, purchases and "others", which includes transport. An assumption is made that the breakdown between these categories at the national level also applies at the local level, for which there is no information available[40] Exogenous data in this worksheet consists of: the number of visitors, length of stay; and daily amounts spent. All of these can be changed and the results observed should revised or new data become available.

The sequence of the calculations and the tables in worksheet is as follows:

- The number of visitors by quarter by type of lodging for each year is entered in the corresponding tables that show each quarter for each year of the period. For Fray Bentos/Las Cañas this was calculated outside of the worksheet and the results reported in Tables A51 and A52.
- From these tables, separate tables for each year are automatically calculated.
- Tables which are derived from the above show: the percentage distribution by type of lodging, the values for each year compared to the year 2000; and the quarterly percentage of visitors by type of lodging.

[40] Neither was a breakdown available at the regional level.

- Length of stay is entered in the tables that show each quarter for each year of the period. For Fray Bentos/Las Cañas this is the same as for the Littoral Region.
- As a result of the above, subsequent tables show: the number of visitor-days by type of lodging, and a series of tables that show this information broken down in the same manner as for the number of visitors.
- Expenditure per visitor-day in US dollars is entered in the tables that show each quarter for each year. For Fray Bentos/Las Cañas this is the same as that reported for visitors to Uruguay by type of lodging.
- A subsequent series of tables by quarter and by year then show the total expenditure by type of lodging.
- A percentage breakdown of expenditure by category is then entered in the tables that show each quarter for each year of the period. For Fray Bentos/Las Cañas this was taken to be the same as for visitors to Uruguay by type of lodging.
- As a result of the above, tables are automatically filled showing breakdown of visitors' expenditures by category, including an index with the year 2000 equal to 100.
- There are eleven sets of tables: four for each quarter and one showing the sum of the four quarters for each year of the period; and six sets of tables showing each year 2000 through 2005 independently.

The results of these calculations are given in detail in Annex Tables A51, A52 and A54 through A66 and a summary is shown in text Table 44, showing quarterly expenditures. From these tables it can be observed that:

- Estimated annual expenditures by international visitors was about US$22.9 million in 2000, fell to US$9.5 million in 2002 and only reached US$11.9 million in 2005.
- Spending per visitor was highest in the 1st quarter, US$192 on the average, whereas spending per visitor - day, at US$37.37, was highest in the 2nd quarter.
- On the average the first quarter accounted for about 52% of the total annual expenditure.
- The average visitor during the period had daily expenditure of about US$11 on food, US$10 on transport and "other items", US$7 on lodging and US$6 on purchases.

Table 44
Fray Bentos/Las Cañas
Expenditures by International Visitors
Quarterly 2000 – 2005
(In US$ '000s)

Quarter	2000	2001	2002	2003	2004	2005
First	13,947	10,557	4,880	3,998	4,826	6,082
Second	2,366	3,350	1,253	1,289	2,652	1,152
Third	2,584	3,391	1,818	1,309	1,433	1,744
Fourth	4,023	3,598	1,584	2,047	2,807	2,889
Total	22,920	20,896	9,536	8,644	11,718	11,866

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

There is virtually no information available on the magnitude of internal tourism and it is difficult to estimate the amount of domestic tourist expenditure in Fray Bentos/Las Cañas. The 2001 survey suggest that there was roughly a 75:25 ratio between the number of Argentine and the number of Uruguayan visitors, but even that ratio varied widely according to the date on which the survey was taken.

If Uruguayans accounted for one third of the expenditure then the total expenditure in 2000 would have been about US$34 million, in 2002 about US$14 million and in 2005 about US$18 million. In the absence of further information these have been accepted as possible order-of-magnitude values.

The following discussion provides background information on the departmental economy in order that the tourism expenditures might be put in perspective.

The Department of Rio Negro in the census of 2004 accounted for 1.67% of Uruguay's population, and in 2003 represented about 1.72% of gross domestic product. While Gross Departmental Product (GDPP) of Rio Negro in the early 1990s followed national trends rising steadily until it peaked in 1998, after that it experienced only a slight drop below the peak in 1999, and a drop in 2002, but to levels above the peak year. GDPP in the last decade has differed from national trends, with a decline in 2002 not so precipitous as for the national economy and by 2003 the GDPP was 14% above the peak year.

The commerce, hotel and restaurant sector[41] of the department, on the other hand, while witnessing high levels of activity prior to 1998 and substantial decline through 2001, showed a large drop in activity in the crisis year of 2002 when the value added was only 71% of the peak 1998 level and in 2003 was only 72% of the peak.

As a result, and similar to trends in the country as a whole, the commerce, hotel and restaurant sector in Rio Negro is progressively contributing less to GDDP. In 1993 the combined contribution of commerce, hotels and restaurants was 15.7% of GDDP and by 2003 it was only 9.0% of GDDP. Although data was not available later than 2003, local opinion points to a substantial recovery in this sector in 2004 and 2005, with new operators coming in to the department, encouraged by the increase in construction activity associated with the pulp mills.

Table 45 provides a summary of the trends in GDDP and in the departmental hotel and restaurant sector. Annex Table A67 shows the GDDP in current and constant US$ over the period 1993 – 2003 by sector.

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[41] From available sources it was not possible to separate out hotels and restaurants at the departmental level.

Table 45
Department of Rio Negro
Total Gross Departmental Product and Contribution of Commerce, Hotels and Restaurants
(In millions of Uruguayan pesos of 1990)

Year	GDDP	Commerce, Hotels, Restaurants	C, H & R as percentage of GDDP	GDDP Index 1998=100	C, H & R Index 1998=100
1993	143.0	22.5	15.7	84.7	92.7
1994	159.0	25.0	15.7	94.2	102.9
1995	159.5	22.6	14.2	94.5	93.0
1996	159.8	23.1	14.5	94.7	95.3
1997	161.4	24.4	15.1	95.6	100.4
1998	168.8	24.3	14.4	100.0	100.0
1999	167.1	23.7	14.2	99.0	97.7
2000	169.2	22.3	13.2	100.3	91.8
2001	177.3	20.9	11.8	105.1	86.2
2002	172.3	17.1	9.9	102.1	70.7
2003	192.7	17.4	9.0	114.2	71.5

Source: Uruguay: Oficina de Presupuesto y Planeamiento

Using the information in the worksheet and in the relevant annex tables, it is possible to suggest the order of magnitude of the direct contribution of tourism to the economy of Rio Negro, both in terms of the commerce, hotel and restaurant sector and of the total GDDP, for the years 2000-2003, for which information is available on departmental GDDP. Table 46 suggests this order of magnitude. The following assumptions were made in producing this table:

- International expenditure was 75% of the total, as found in the 2001 Tourist Survey of Fray Bentos/Las Cañas.
- The percentage of value added to gross product is 0.725 for commerce, hotels and restaurants and 0.62 for the total GDP, in conformance with experience at the national level in these years.

The table shows the importance of tourism to the commerce, hotel and restaurant sector, in “normal” years accounting for about one third of its contribution to the GDDP.

Table 46
Fray Bentos/Las Cañas
Contribution of Tourism to Gross Departmental Domestic Product
2000 – 2003
In US$ Millions

	2000	2001	2002	2003
Expenditure – International Visitors	22.9	20.9	9.5	8.6
Expenditure - Uruguayan Visitors	7.6	7.0	3.2	2.9
Total Visitor Expenditure	30.5	27.9	12.7	11.5
GDDP Commerce, Hotels & Restaurants	33.7	30.3	18.5	16.6
Gross Departmental Product	256.2	256.7	185.7	184.0
Tourism Value Added CHR Sector	16.9	15.2	7.0	5.7
Tourism Value Added GDDP	18.9	17.3	7.9	7.1
Visitor Value Added as % of CHR Value Added	36.4	36.3	27.5	25.0
Visitor Value Added as % of GDDP	3.0	2.7	1.7	1.6

Source: Consultants' estimates

Table 47 shows the employment in the department by sector. Employment in commerce, hotels and restaurants accounts for about 13.5% of total employment, well below the national average of about 23.5% of the total, accountable in part by the high number of persons employed in the public sector in the department.

Table 47
Department of Rio Negro
Estimated Employment by Sector 2003

Sector	Employment (Persons)	Distribution (%)
Agriculture, Fisheries, Livestock, Mines & Quarries	1,111	11.7
Manufacturing Industry	513	5.4
Water, Gas, Electricity	57	0.6
Construction	1,235	13.0
Commerce, Hotels and Restaurants	1,282	13.5
Transport, Storage and Communications	969	10.2
Finance, Insurance, Real Estate	152	1.6
Community, Social and Personnel Services	4,179	44.0
Total	9,498	100.0

Source: Pedro Barrenechea et al. Impact of Pulp Mill Project on Regional and Local Development, 2004.

The number of jobs directly attributable to tourism is difficult to estimate, as insufficient information is available on the number of people employed directly as a result of tourism activities. Informed persons concerned with tourism suggest that in the commerce, hotel, restaurant and transport sectors about 150 full-time jobs would be attributable to tourism and that during January and February an additional 600 jobs, most of which are related to activities in Las Cañas, are created to serve the heavy influx of visitors during the summer months.

II. ANNEX TABLES

TABLE A1
ARGENTINA
VISITORS BY NATIONALITY 1995 - 2004
(In thousands)

Year	Bolivians	Brazilians	Chileans	Paraguayans	Uruguayans	North Amer.	Other Amer.	Europeans	Asians etc.	Total
1995	123.7	316.8	465.7	415.9	387.3	178.2	100.4	248.3	52.2	2,288.7
1996	119.8	412.1	482.6	506.6	397.1	221.3	112.6	298.9	63.0	2,613.9
1997	142.9	445.3	481.6	442.7	504.4	242.2	119.1	319.8	66.1	2,764.2
1998	144.0	494.8	549.7	489.1	528.5	264.3	124.9	344.3	72.8	3,012.5
1999	101.7	451.8	541.2	515.9	513.7	249.8	116.6	336.7	70.9	2,898.2
2000	95.1	451.4	571.3	499.8	488.0	252.4	122.1	354.1	75.3	2,909.5
2001	113.2	333.0	520.3	469.2	392.5	179.8	149.2	370.9	92.3	2,620.5
2002	119.1	345.0	749.0	518.3	363.0	152.6	172.5	323.7	76.7	2,820.0
2003	59.7	350.3	768.8	429.8	363.1	224.5	229.6	456.0	114.5	2,996.3
2004	69.0	361.7	831.9	459.0	429.7	259.4	242.4	555.1	144.3	3,352.6

Source: INDEC - Directory of International Accounts

TABLE A2
ARGENTINA
VISITOR EXPENDITURES BY NATIONALITY 1995 - 2004
(In US$ millions)

Year	Bolivians	Brazilians	Chileans	Paraguayans	Uruguayans	North Amer.	Other Amer.	Europeans	Asians etc.	Total
1995	88.9	304.8	329.6	296.7	179.9	285.0	129.7	449.1	80.3	2,144.0
1996	87.0	402.9	340.7	377.5	184.4	356.6	148.0	547.6	96.8	2,541.5
1997	104.4	436.6	347.6	337.2	237.0	391.0	157.3	580.6	101.3	2,693.0
1998	105.7	483.8	393.6	368.3	248.3	429.8	166.7	629.3	110.8	2,936.3
1999	74.2	417.5	383.6	407.7	249.6	407.8	154.7	609.8	107.8	2,812.7
2000	70.5	416.9	402.4	374.5	236.9	412.1	161.5	628.8	113.6	2,817.2
2001	81.4	300.5	353.5	346.3	185.9	293.4	197.2	652.5	136.7	2,547.4
2002	42.7	159.7	298.1	201.4	113.0	152.9	127.7	314.9	66.0	1,476.4
2003	25.8	194.5	346.0	173.5	117.4	246.9	195.5	528.7	114.0	1,942.3
2004	34.1	225.7	425.1	225.4	153.7	315.3	230.8	723.4	157.5	2,491.0

Source: INDEC - Directory of International Accounts

TABLE A3
ARGENTINA
VISITOR EXPENDITURES PER CAPITA BY NATIONALITY 1995 - 2004
(In US$)

Year	Bolivians	Brazilians	Chileans	Paraguayans	Uruguayans	North Amer.	Other Amer.	Europeans	Asians etc.	Total
1995	718.7	962.2	707.7	713.3	464.5	1,599.5	1,291.3	1,808.3	1,537.5	936.8
1996	726.0	977.7	706.0	745.1	464.3	1,611.7	1,314.8	1,832.3	1,537.3	972.3
1997	730.3	980.4	721.7	761.8	469.9	1,614.4	1,320.2	1,815.6	1,532.2	974.2
1998	734.0	977.7	716.0	753.0	469.8	1,626.2	1,334.7	1,827.6	1,522.6	974.7
1999	729.4	924.1	708.8	790.2	485.8	1,632.6	1,327.1	1,811.2	1,520.5	970.5
2000	741.5	923.6	704.3	749.2	485.4	1,632.8	1,322.5	1,776.0	1,509.3	968.3
2001	718.9	902.4	679.4	738.1	473.7	1,631.5	1,322.1	1,759.1	1,480.4	972.1
2002	358.5	462.8	398.0	388.6	311.3	1,001.8	740.3	972.7	860.3	523.5
2003	432.3	555.2	450.1	403.7	323.3	1,099.9	851.4	1,159.4	995.3	648.2
2004	494.0	624.0	511.0	491.1	357.7	1,215.7	952.1	1,303.1	1,091.2	743.0

Source: INDEC - Directory of International Accounts

TABLE A4
ARGENTINA
ARGENTINE RESIDENTS
NUMBER OF VISITORS USING HOTELS AND PARAHOTELS
(In thousands, January - October 2005)

Visitors	January	February	March	April	May	June	July	August	September	October	Total
City of Buenos Aires	106.1	117.5	136.5	132.9	139.3	148.0	173.9	171.5	164.5	163.3	1,453.5
Region of Buenos Aires	390.6	299.6	191.2	96.3	84.1	76.5	111.2	110.3	125.6	140.8	1,626.2
Central Region	184.5	155.2	122.9	102.4	104.1	96.9	156.3	128.2	120.3	141.2	1,312.0
Cuyo Region	115.5	102.1	110.4	100.4	96.9	93.4	139.7	115.7	113.7	114.3	1,101.9
Litoral Region	101.0	97.7	110.2	96.1	108.9	105.2	155.2	148.5	146.3	141.4	1,210.6
North Region	149.8	140.6	126.1	124.3	114.8	126.2	224.2	147.2	139.2	127.3	1,419.7
Patagonia	210.7	168.8	132.0	99.5	83.9	90.4	166.8	154.5	148.9	130.6	1,386.0
Total	1,258.2	1,081.4	929.4	751.9	732.1	736.7	1,127.3	975.8	958.4	958.8	9,509.9

Source: INDEC: Survey of Hotel Occupancy

TABLE A5
ARGENTINA
ARGENTINE RESIDENTS
NUMBER OF HOTEL AND PARAHOTEL NIGHTS
(In thousands, January - October 2005)

Number of Nights	January	February	March	April	May	June	July	August	September	October	Total
City of Buenos Aires	251.1	274.7	337.6	319.1	321.8	343.4	433.2	382.7	366.2	351.3	3,381.2
Region of Buenos Aires	1,969.8	1,391.7	705.0	283.3	192.3	181.6	312.6	271.2	289.6	366.8	5,964.0
Central Region	618.2	470.8	307.8	186.5	192.8	175.2	365.0	250.3	236.4	300.2	3,103.1
Cuyo Region	294.2	264.4	262.9	214.1	180.1	191.2	319.4	239.2	220.0	248.1	2,433.5
Litoral Region	227.7	210.5	186.2	164.7	201.9	190.7	284.2	249.6	250.6	245.9	2,212.1
North Region	282.8	236.8	214.5	199.1	203.6	228.7	439.8	308.0	279.2	237.0	2,629.6
Patagonia	646.7	475.4	346.5	250.6	189.0	219.5	529.0	479.0	497.4	338.1	3,971.2
Total	4,290.5	3,324.3	2,360.5	1,617.5	1,481.6	1,530.4	2,683.2	2,179.8	2,139.4	2,087.4	23,694.7

Source: INDEC: Survey of Hotel Occupancy

TABLE A6
ARGENTINA
ARGENTINE RESIDENTS
NUMBER OF HOTEL AND PARAHOTEL NIGHTS PER VISITOR
(January - October 2005)

Nights/Visitor	January	February	March	April	May	June	July	August	September	October	Average
City of Buenos Aires	2.4	2.3	2.5	2.4	2.3	2.3	2.5	2.2	2.2	2.2	2.3
Region of Buenos Aires	5.0	4.6	3.7	2.9	2.3	2.4	2.8	2.5	2.3	2.6	3.7
Central Region	3.4	3.0	2.5	1.8	1.9	1.8	2.3	2.0	2.0	2.1	2.4
Cuyo Region	2.5	2.6	2.4	2.1	1.9	2.0	2.3	2.1	1.9	2.2	2.2
Litoral Region	2.3	2.2	1.7	1.7	1.9	1.8	1.8	1.7	1.7	1.7	1.8
North Region	1.9	1.7	1.7	1.6	1.8	1.8	2.0	2.1	2.0	1.9	1.9
Patagonia	3.1	2.8	2.6	2.5	2.3	2.4	3.2	3.1	3.3	2.6	2.9
Total	3.4	3.1	2.5	2.2	2.0	2.1	2.4	2.2	2.2	2.2	2.5

Source: INDEC: Survey of Hotel Occupancy

Table A7
Argentina
Gualeguaychú
Hotel and Parahotel Information 2004

		January	February	March	April	May	June	July	August	September	October	November	December	Avge/Total
Hotels	Number	12	12	12	12	12	11	11	12	12	12	12	12	11.8
	Available room-nights	9,021	8,149	8,742	8,460	8,680	7,560	7,812	8,649	8,250	8,680	8,460	8,742	101,205
	Room-nights occupied	5,185	5,006	3,606	3,247	3,058	2,957	3,274	3,231	3,074	4,017	3,284	3,471	43,410
	Available bed-nights	23,002	20,416	21,855	21,160	21,855	18,690	19,313	21,855	21,240	21,886	21,180	21,658	254,110
	Bed-nights occupied	11,533	10,600	6,343	5,655	5,165	4,532	5,605	5,704	4,592	6,228	4,763	5,618	76,338
	Room occupancy (%)	57.5%	61.4%	41.2%	38.4%	35.2%	39.1%	41.9%	37.4%	37.3%	46.3%	38.8%	39.7%	42.9%
	Bed occupancy (%)	50.1%	51.9%	29.0%	26.7%	23.6%	24.2%	29.0%	26.1%	21.6%	28.5%	22.5%	25.9%	30.0%
	Average stay (days)	2.8	2.4	1.6	1.7	1.7	1.6	1.6	1.6	1.6	1.7	1.6	1.6	1.8
	Personnel employed	87	92	85	82	85	86	82	89	80	91	87	91	86.4
Parahotels	Number	40	40	40	37	36	36	36	35	35	35	34	37	36.8
	Available room-nights	12,400	12,296	12,772	12,594	11,563	11,250	11,594	11,346	11,010	11,935	10,650	11,687	141,097
	Room-nights occupied	6,476	6,674	2,455	2,716	1,150	1,130	1,574	1,818	1,733	1,933	1,656	2,038	31,353
	Available bed-nights	44,640	43,674	47,864	45,456	42,842	41,160	42,811	42,439	41,580	42,811	39,600	43,863	518,740
	Bed-nights occupied	22,945	24,655	6,929	9,543	3,393	3,161	4,659	4,874	4,871	5,728	4,847	6,548	102,153
	Room occupancy (%)	52.2%	54.3%	19.2%	21.6%	9.9%	10.0%	13.6%	16.0%	15.7%	16.2%	15.5%	17.4%	22.2%
	Bed occupancy (%)	51.4%	56.5%	14.5%	21.0%	7.9%	7.7%	10.9%	11.5%	11.7%	13.4%	12.2%	14.9%	19.7%
	Average stay (days)	3.8	3.3	2.8	2.9	2.0	1.9	2.5	3.4	2.0	2.0	2.6	2.3	2.6
	Personnel employed	162	184	150	142	114	120	118	117	115	113	125	157	134.8
Hotels and Lodgings	Number	52	52	52	49	48	47	47	47	47	47	46	49	48.6
	Available room-nights	21,421	20,445	21,514	21,054	20,243	18,810	19,406	19,995	19,260	20,615	19,110	20,429	242,302
	Room-nights occupied	11,661	11,680	6,061	5,963	4,208	4,087	4,848	5,049	4,807	5,950	4,940	5,509	74,763
	Available bed-nights	67,642	64,090	69,719	66,616	64,697	59,850	62,124	64,294	62,820	64,697	60,780	65,521	772,850
	Bed-nights occupied	34,478	35,255	13,272	15,198	8,558	7,693	10,264	10,578	9,463	11,956	9,610	12,166	178,491
	Room occupancy (%)	54.4%	57.1%	28.2%	28.3%	20.8%	21.7%	25.0%	25.3%	25.0%	28.9%	25.9%	27.0%	30.9%
	Bed occupancy (%)	51.0%	55.0%	19.0%	22.8%	13.2%	12.9%	16.5%	16.5%	15.1%	18.5%	15.8%	18.6%	23.1%
	Average stay (days)	3.6	3.2	2.6	2.6	1.9	1.8	2.3	2.9	1.9	1.9	2.3	2.1	2.4
	Personnel employed	249	276	235	224	199	206	200	206	195	204	212	248	221.2

Source: INDEC-SECTUR Survey of Hotel Occupancy 2004 available at www.turismo.gov.ar

Table A8
Argentina
Gualeguaychú
Hotel and Parahotel Information 2005 (1st 10 months)

		January	February	March	April	May	June	July	August	September	October	Avge/Total
Hotels	Number	13	13	13	13	13	13	13	13	13	13	13.0
	Available room-nights	8,804	7,812	9,114	8,820	9,114	8,820	8,928	9,114	8,880	8,711	88,117
	Room-nights occupied	5,949	5,062	4,103	2,721	3,034	2,841	3,433	3,798	3,399	3,213	37,553
	Available bed-nights	23,343	21,028	23,436	22,680	23,436	22,680	23,467	23,436	22,680	22,971	229,157
	Bed-nights occupied	13,379	11,573	8,007	4,946	5,251	5,213	6,535	6,591	6,175	5,837	73,507
	Room occupancy (%)	67.6%	64.8%	45.0%	30.9%	33.3%	32.2%	38.5%	41.7%	38.3%	36.9%	42.6%
	Bed occupancy (%)	57.3%	55.0%	34.2%	21.8%	22.4%	23.0%	27.8%	28.1%	27.2%	25.4%	32.1%
	Average stay (days)	2.5	2.1	1.9	1.6	1.6	1.7	1.9	1.7	1.6	1.7	1.8
	Personnel employed	109	107	103	101	100	102	97	106	100	100	102.5
Parahotels	Number	54	54	54	51	51	51	51	51	51	51	51.9
	Available room-nights	16,182	14,840	15,686	15,270	15,407	15,330	15,903	15,562	14,760	15,779	154,719
	Room-nights occupied	7,912	7,650	3,638	1,906	1,387	2,311	4,274	3,226	2,874	3,976	39,154
	Available bed-nights	61,566	55,552	61,101	57,390	59,024	57,060	59,303	59,985	56,370	58,962	586,313
	Bed-nights occupied	26,858	25,263	11,669	4,508	2,780	5,228	11,920	9,676	8,419	11,415	117,736
	Room occupancy (%)	48.9%	51.5%	23.2%	12.5%	9.0%	15.1%	26.9%	20.7%	19.5%	25.2%	25.3%
	Bed occupancy (%)	43.6%	45.5%	19.1%	7.9%	4.7%	9.2%	20.1%	16.1%	14.9%	19.4%	20.1%
	Average stay (days)	3.2	2.9	2.4	1.6	1.5	1.6	2.5	2.0	1.7	2.0	2.2
	Personnel employed	216	216	193	168	143	167	222	248	241	243	205.7
Hotels and Lodgings	Number	67	67	67	64	64	64	64	64	64	64	64.9
	Available room-nights	24,986	22,652	24,800	24,090	24,521	24,150	24,831	24,676	23,640	24,490	242,836
	Room-nights occupied	13,861	12,712	7,741	4,627	4,421	5,152	7,707	7,024	6,273	7,189	76,707
	Available bed-nights	84,909	76,580	84,537	80,070	82,460	79,740	82,770	83,421	79,050	81,933	815,470
	Bed-nights occupied	40,237	36,836	19,676	9,454	8,031	10,441	18,455	16,267	14,594	17,252	191,243
	Room occupancy (%)	55.5%	56.1%	31.2%	19.2%	18.0%	21.3%	31.0%	28.5%	26.5%	29.4%	31.6%
	Bed occupancy (%)	47.4%	48.1%	23.3%	11.8%	9.7%	13.1%	22.3%	19.5%	18.5%	21.1%	23.5%
	Average stay (days)	3.1	2.8	2.3	1.6	1.5	1.6	2.3	2.0	1.7	2.0	2.1
	Personnel employed	325	323	296	269	243	269	319	354	341	343	308.2

Source: INDEC-SECTUR Survey of Hotel Occupancy 2005 available at www.turismo.gov.ar

Table A9
Argentina
Gualeguaychu Carnival
No. of Tickets Sold by Night
1994 - 2006

Night No.	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Average
1	7,273	10,436	5,097	19,880	12,846	18,663	16,622	19,269		9,347	4,269	1,380	16,943	10,925
2	12,969	18,361	9,076	20,782	12,167	21,893	22,423	6,211	5,973	9,749	7,153	6,655	8,381	12,446
3	15,305	21,366	10,589	15,855	13,338	24,408	24,741	15,111	11,195	15,272	13,264	11,825	18,252	16,194
4	20,112	19,026	14,221	7,001	7,246		7,485	13,507	12,267	17,647	19,019	19,612	19,033	13,552
5	9,334	10,866	6,315	21,102	14,676	15,934	25,789	15,618	15,470	14,418	9,896	18,948	16,878	15,019
6	29,349	27,628	25,862	19,066	25,406	32,994	8,766	7,273	15,985	22,271	26,459	27,787	26,286	22,702
7	13,299	11,899	9,885	30,132	11,352	11,826	8,613	18,076	22,255	14,058	24,938	28,559	25,320	17,709
8	31,330	29,853	31,283	10,431	27,434	33,326	9,227		20,826	19,099	25,810	31,344	18,493	22,189
9	14,223	14,353	18,337	31,592	27,253	12,748	23,822	19,575	17,317	8,908	2,839	24,718	14,690	17,721
10	26,566	32,270	31,236	12,888	9,322	28,395		5,030		13,618	22,591	16,483		15,261
11	10,319		19,356	18,698		9,862	18,650	15,315						7,092
12				12,624		20,992	7,884	8,803						3,869
13							12,090							930
Total	190,079	196,058	181,257	220,051	161,040	231,041	186,112	143,788	121,288	144,387	156,238	187,311	164,276	175,610
No. of Nights	11	10	11	12	10	11	12	11	8	10	10	10	9	10
Average	17,280	19,606	16,478	18,338	16,104	21,004	15,509	13,072	15,161	14,439	15,624	18,731	18,253	16,892
Maximum	31,330	32,270	31,283	31,592	27,434	33,326	25,789	19,575	22,255	22,271	26,459	31,344	26,286	27,786
Minimum	7,273	10,436	5,097	7,001	7,246	9,862	7,485	5,030	5,973	9,347	2,839	1,380	6,655	6,586

Source: Estudio Fernandez Tesone, Gualeguaychu

Table A10
Argentina
Gualeguaychu Carnaval
Monthly No. of Tickets Sold
1994 - 2006

Monthly Totals	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Average
January	35,547	50,163	24,762	40,662	38,351	64,964	63,786	54,098	29,435	52,015	53,601	58,420	62,609	48,340
February	154,532	145,895	156,495	148,067	113,367	145,085	102,352	80,887	74,536	69,846	102,637	112,408	86,977	114,853
March	0	0	0	31,322	9,322	20,992	19,974	8,803	17,317	22,526	0	16,483	14,690	12,418
Total	190,079	196,058	181,257	220,051	161,040	231,041	186,112	143,788	121,288	144,387	156,238	187,311	164,276	175,610
Monthly %														
January	18.7%	25.6%	13.7%	18.5%	23.8%	28.1%	34.3%	37.6%	24.3%	36.0%	34.3%	31.2%	38.1%	27.5%
February	81.3%	74.4%	86.3%	67.3%	70.4%	62.8%	55.0%	56.3%	61.5%	48.4%	65.7%	60.0%	52.9%	65.4%
March	0.0%	0.0%	0.0%	14.2%	5.8%	9.1%	10.7%	6.1%	14.3%	15.6%	0.0%	8.8%	8.9%	7.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1999 = 100														
January	55	77	38	63	59	100	98	83	45	80	83	90	96	74
February	107	101	108	102	78	100	71	56	51	48	71	77	60	79
March	0	0	0	149	44	100	95	42	82	107	0	79	70	59
Total	82	85	78	95	70	100	81	62	52	62	68	81	71	76

Source: Estudio Fernandez Tesone

Table A11
Argentina
Gualeguaychu Carnival
Visitors Sleeping Arrangements 1994 - 2006
(Numbers)

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Hotels	21,247	23,609	20,555	18,616	14,175	17,092	18,124	18,428	10,010	20,298	16,438	22,657	21,482
Bungalows	1,249	1,182	2,936	3,327	2,493	7,486	4,422	5,772	5,272	7,121	10,912	11,885	6,978
Hotels plus Bungalows	22,496	24,792	23,491	21,943	16,668	24,578	22,546	24,199	15,282	27,419	27,349	34,542	28,461
Rooms in Private Houses	17,655	24,121	22,675	18,319	18,900	28,404	25,527	15,646	11,101	23,027	30,809	22,657	23,700
Relatives	25,147	17,328	12,887	21,805	15,233	16,032	14,137	9,123	11,462	10,448	13,260	19,640	11,577
Campsites	47,335	45,172	42,251	62,682	26,654	56,185	46,733	29,686	35,651	37,412	33,846	53,625	47,385
Remain in Vehicle						8,401	4,640	3,352	10,010	1,663	4,148	5,664	1,286
Return Home	58,438	65,040	61,827	73,297	67,482	74,337	53,919	47,403	25,652	29,979	31,202	32,452	35,439
Total	171,071	176,452	163,131	198,046	144,936	207,937	167,501	129,409	109,159	129,948	140,614	168,580	147,849
Paid Lodging	87,486	94,084	88,417	102,944	62,221	109,167	94,805	69,531	62,035	87,858	92,004	110,825	99,546
Other Lodging	25,147	17,328	12,887	21,805	15,233	16,032	14,137	9,123	11,462	10,448	13,260	19,640	11,577
No Lodging	58,438	65,040	61,827	73,297	67,482	82,738	58,558	50,754	35,662	31,642	35,350	38,116	36,726

Source: Estudio Fernandez Tesone, Annual Survey of Carnaval Visitors, Gualeguaychu.

Table A12
Argentina
Gualeguaychu Carnaval
Visitors Sleeping Arrangements 1994 - 2006
(Percentage Breakdown)

Arrangements	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Hotels	12.4%	13.4%	12.6%	9.4%	9.8%	8.2%	10.8%	14.2%	9.2%	15.6%	11.7%	13.4%	14.5%
Bungalows	0.7%	0.7%	1.8%	1.7%	1.7%	3.6%	2.6%	4.5%	4.8%	5.5%	7.8%	7.1%	4.7%
Hotels plus Bungalows	13.2%	14.1%	14.4%	11.1%	11.5%	11.8%	13.5%	18.7%	14.0%	21.1%	19.5%	20.5%	19.3%
Rooms in Private Houses	10.3%	13.7%	13.9%	9.3%	13.0%	13.7%	15.2%	12.1%	10.2%	17.7%	21.9%	13.4%	16.0%
Relatives	14.7%	9.8%	7.9%	11.0%	10.5%	7.7%	8.4%	7.1%	10.5%	8.0%	9.4%	11.7%	7.8%
Campsites	27.7%	25.6%	25.9%	31.7%	18.4%	27.0%	27.9%	22.9%	32.7%	28.8%	24.1%	31.8%	32.1%
Remain in Vehicle						4.0%	2.8%	2.6%	9.2%	1.3%	3.0%	3.4%	0.9%
Return Home	34.2%	36.9%	37.9%	37.0%	46.6%	35.8%	32.2%	36.6%	23.5%	23.1%	22.2%	19.3%	24.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Paid Lodging	51.1%	53.3%	54.2%	52.0%	42.9%	52.5%	56.6%	53.7%	56.8%	67.6%	65.4%	65.7%	67.3%
Other Lodging	14.7%	9.8%	7.9%	11.0%	10.5%	7.7%	8.4%	7.1%	10.5%	8.0%	9.4%	11.7%	7.8%
No Lodging	34.2%	36.9%	37.9%	37.0%	46.6%	39.8%	35.0%	39.2%	32.7%	24.4%	25.1%	22.6%	24.8%

Source: Based on the Annual Survey of Carnaval Visitors by Estudio Fernandez Tesone, Gualeguaychu

Table A13
Argentina
Gualeguaychu Carnival
Estimated Expenditure by Carnival Visitors
1994 - 2006

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Total Visitors	171,071	176,452	163,131	198,046	144,936	207,937	167,501	129,409	109,159	129,948	140,614	168,580	147,849
Total Expenditure (AR$)	15,974	20,975	16,863	21,641	11,834	22,302	19,820	14,643	9,906	15,951	23,384	30,308	35,281
GDP Deflator 1993 = 100	N.A.	N.A.	106.048	105.554	103.757	101.851	102.908	101.78	132.88	146.826	160.365	174.424	189.141
Expenditure (AR$ of 1993)	N.A.	N.A.	15,901	20,502	11,406	21,897	19,260	14,387	7,455	10,864	14,582	17,376	18,653
Index in constant prices 1993=100	N.A.	N.A.	72.6	93.6	52.1	100.0	88.0	65.7	34.0	49.6	66.6	79.4	85.2
Expenditure per visitor (AR$)	93.37	118.87	103.37	109.27	81.65	107.25	118.33	113.15	90.75	122.75	166.30	179.78	238.63
Expenditure per visitor/day (AR$)	35.08	39.38	38.83	44.10	36.87	38.83	43.65	56.81	33.85	52.65	56.41	55.65	71.83
Exchange Rate AR$/US$	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.90	3.35	2.88	3.01	3.08
Total Expenditure (US$)	15,974	20,975	16,863	21,641	11,834	22,302	19,820	14,643	5,214	4,762	8,119	10,069	11,455
Expenditure per visitor (US$)	93.37	118.87	103.37	109.27	81.65	107.25	118.33	113.15	47.76	36.64	57.74	59.73	77.48
Expenditure per day (US$)	35.08	39.38	38.83	44.10	36.87	38.83	43.65	56.81	17.81	15.72	19.59	18.49	23.32

Source: Based on the Annual Survey of Carnival Visitors by Estudio Fernandez Tesone, Gualeguaychu
Note: Exchange rates prevailing in February of each year.

Table A14
Argentina
Gualeguaychu
Expenditures by All Visitors 1997 - 2005
January - February of Each Year
(In '000 US$)

Year	Hotel	Para-Hotels	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Camp-Sites	Total in Lodgings	Sleep in Vehicle	Total Overnight	Return Home	Total Visitors
1997	3,755	565	4,320	3,157	2,026	15,400	24,903	0	24,903	1,616	26,519
1998	2,285	339	2,624	2,604	1,131	5,234	11,593	0	11,593	1,244	12,837
1999	3,330	1,229	4,559	4,729	1,439	13,333	24,060	744	24,804	1,443	26,247
2000	3,848	791	4,639	4,631	1,382	12,086	22,738	448	23,186	1,177	24,363
2001	3,940	1,040	4,980	2,858	898	7,731	16,467	326	16,793	1,346	18,139
2002	834	370	1,204	791	440	3,619	6,054	379	6,433	228	6,661
2003	1,306	386	1,692	1,266	310	2,933	6,201	49	6,250	236	6,486
2004	1,642	918	2,560	2,630	610	4,118	9,918	188	10,106	306	10,412
2005	2,315	1,023	3,338	1,979	924	6,675	12,916	263	13,179	300	13,479

Table A 15

GUALEGUAYCHU

PROFILE OF TOURISM DURING JANUARY AND FEBRUARY 1997 - 2006

	Years	Hotel	Para-Hotels	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Carnival Visitors Camp-Sites	Overall Average	Sleep in Vehicle	Total Overnight	Return Home	Total Visitors	Non Carnival Visitors Camp-Sites	Campsites Total	Visitors in Lodgings	All Visitors Total Over Nighters	Total Visitors
Expenditure per visitor day (In Argentine Pesos)	1997	72.76	61.29	71.02	62.18	33.51	31.89	43.50		43.50	22.05	44.10	31.89	31.89	38.02	38.02	36.41
	1998	60.84	51.25	59.40	51.99	28.02	26.66	40.16		40.16	18.44	36.87	26.66	26.66	35.03	35.03	32.22
	1999	64.06	53.97	60.99	54.74	29.51	28.07	40.77	29.12	40.04	19.41	38.83	28.07	28.07	35.13	34.92	33.45
	2000	72.02	60.67	69.79	61.54	33.17	31.56	46.71	32.74	46.14	21.82	43.65	31.56	31.56	40.15	39.98	38.43
	2001	93.73	78.96	90.21	80.10	43.17	41.08	64.20	42.60	63.31	28.40	56.81	41.08	41.08	54.91	54.60	51.10
	2002	55.85	47.05	52.81	47.73	25.72	24.48	34.07	25.39	33.03	16.92	33.85	24.48	24.48	29.63	29.34	28.62
	2003	86.87	73.18	83.31	74.23	40.01	38.07	59.37	39.49	59.04	26.32	52.65	38.07	38.07	50.77	50.65	49.01
	2004	93.07	78.40	87.22	79.53	42.87	40.79	64.45	42.30	63.61	28.20	56.41	40.79	40.79	55.84	55.51	53.97
	2005	91.82	77.35	86.84	78.46	42.29	40.24	59.52	41.73	58.78	27.82	55.65	40.24	40.24	51.38	51.14	50.20
	2006	118.52	99.84	113.94	101.28	54.59	51.94	78.62	53.87	78.33	35.91	71.83	51.94	51.94	67.11	67.02	65.38
	2006*	90.51	75.90	83.95	76.71	41.55	39.45	53.01					39.45	39.45			

	Years	Hotel	Para-Hotels	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Carnival Visitors Camp-Sites	Overall Average	Sleep in Vehicle	Total Overnight	Return Home	Total Visitors
Percentage Visitor Distribution by Lodging	1997	9.40%	1.68%	11.08%	9.25%	11.01%	31.65%	62.99%	0.00%	62.99%	37.01%	100.00%
	1998	9.78%	1.72%	11.50%	13.04%	10.51%	18.39%	53.44%	0.00%	53.44%	46.56%	100.00%
	1999	8.22%	3.60%	11.82%	13.66%	7.71%	27.02%	60.21%	4.04%	64.25%	35.75%	100.00%
	2000	10.82%	2.64%	13.46%	15.24%	8.44%	27.90%	65.04%	2.77%	67.81%	32.19%	100.00%
	2001	14.24%	4.46%	18.70%	12.09%	7.05%	22.94%	60.78%	2.59%	63.37%	36.63%	100.00%
	2002	9.17%	4.83%	14.00%	10.17%	10.50%	32.66%	67.33%	9.17%	76.50%	23.50%	100.00%
	2003	15.62%	5.48%	21.10%	17.72%	8.04%	28.79%	75.65%	1.28%	76.93%	23.07%	100.00%
	2004	11.69%	7.76%	19.45%	21.91%	9.43%	24.07%	74.86%	2.95%	77.81%	22.19%	100.00%
	2005	13.44%	7.05%	20.49%	13.44%	11.65%	31.81%	77.39%	3.36%	80.75%	19.25%	100.00%
	2006	14.53%	4.72%	19.25%	16.03%	7.83%	32.05%	75.16%	0.87%	76.03%	23.97%	100.00%
	2006*	8.72%	7.10%	15.82%	13.48%	3.55%	56.66%	89.51%		89.51%	10.49%	100.00%

	Years	Hotel	Para-Hotels	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Carnival Visitors Camp-Sites	Non Carnival Visitors Camp-Sites
No. of Rooms/Camping Spots	2005	284	499	783	500	1,000	4,840	4,840
No of Sleeping Places/Room or Camping Spot	1997-2006	3	4	3.6	3	3	4	4

	Years	Hotel	Para-Hotels	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Carnival Visitors Camp-Sites	Overall Average	Sleep in Vehicle	Total Overnight	Return Home	Total Visitors	Non Carnival Visitors Camp-Sites	Campsites Total	Visitors in Lodgings	All Visitors Total Over Nighters	Total Visitors
Average Length of Stay (Days)	1997	2.77	2.77	2.77	2.77	2.77	2.77	2.77	N.A.	2.77	1.00	2.48	4.95	3.86	3.50	3.50	2.80
	1998	2.65	2.65	2.65	2.65	2.65	2.65	2.65	N.A.	2.65	1.00	2.21	4.73	3.69	3.18	3.18	2.32
	1999	3.04	3.04	3.04	3.04	3.04	3.04	3.04	3.04	3.04	1.00	2.76	5.43	4.23	3.78	3.75	2.97
	2000	2.95	2.95	2.95	2.95	2.95	2.95	2.95	2.95	2.95	1.00	2.71	5.26	4.10	3.64	3.62	2.96
	2001	2.28	2.28	2.28	2.28	2.28	2.28	2.28	2.28	2.28	1.00	1.99	4.07	3.17	2.77	2.76	2.23
	2002	2.84	2.84	2.84	2.84	2.84	2.84	2.84	2.84	2.84	1.00	2.68	5.06	3.94	3.56	3.50	3.06
	2003	2.48	2.48	2.48	2.48	2.48	2.48	2.48	2.48	2.48	1.00	2.33	4.43	3.45	3.02	3.01	2.65
	2004	3.09	3.09	3.09	3.09	3.09	3.09	3.09	3.09	3.09	1.00	2.95	5.51	4.30	3.68	3.66	3.19
	2005	3.35	3.35	3.35	3.35	3.35	3.35	3.35	3.35	3.35	1.00	3.23	5.98	4.66	4.11	4.09	3.64
	2006	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25	1.00	3.09	5.79	4.52	4.00	4.00	3.45
	2006*	4.52	4.52	4.52	4.52	4.52	4.52	4.52		4.52							

Ratios	Years	Non Carnival Visitors Camp-Sites
Numbers of Non-Carnival to Carnival Campers	2006	0.9975
Length of Stay of Non-Carnival to Carnival Campers	2006	1.7840

	Years	Hotel	Para-Hotels	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Carnival Visitors Camp-Sites	Overall Average	Sleep in Vehicle	Total Overnight	Return Home	Total Visitors	Non Carnival Visitors Camp-Sites	Campsites Total	Visitors in Lodgings	All Visitors Total Over Nighters	Total Visitors
Visitors January - February	1997	18,616	3,327	21,943	18,319	21,805	62,682	124,749	0	124,749	73,297	198,046	62,525	125,206	187,274	187,274	260,571
	1998	14,175	2,493	16,668	18,900	15,233	26,654	77,454	0	77,454	67,482	144,936	26,587	53,241	104,041	104,041	171,523
	1999	17,092	7,486	24,578	28,404	16,032	56,185	125,199	8,401	133,599	74,337	207,937	56,044	112,229	181,243	189,644	263,981

2000	18,124	4,422	22,546	25,527	14,137	46,733	108,943	4,640	113,582	53,919	167,501	46,616	93,349	155,558	160,198	214,117
2001	18,428	5,772	24,200	15,646	9,123	29,686	78,655	3,352	82,007	47,403	129,409	29,612	59,299	108,267	111,619	159,021
2002	10,010	5,272	15,282	11,101	11,462	35,651	73,497	10,010	83,507	25,652	109,159	35,562	71,214	109,059	119,069	144,721
2003	20,298	7,121	27,419	23,027	10,448	37,412	98,306	1,663	99,969	29,979	129,948	37,319	74,731	135,624	137,288	167,267
2004	16,438	10,912	27,349	30,809	13,260	33,846	105,264	4,148	109,412	31,202	140,614	33,761	67,607	139,025	143,173	174,375
2005	22,657	11,885	34,542	22,657	19,640	53,625	130,464	5,664	136,128	32,452	168,580	53,491	107,116	183,955	189,619	222,071
2006	21,482	6,978	28,461	23,700	11,577	47,385	111,123	1,286	112,409	35,439	147,848	47,267	94,652	158,390	159,676	195,115
2006*	14,567	11,860	26,427	22,518	5,930	94,650	149,526		166,140		167,049					185,610

Carnival Visitor - Nights

							Carnival Visitors					Non Carnival Visitors			All Visitors	
Years	Hotel	Para-Hotels	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Camp-Sites	Overall Average	Sleep in Vehicle	Total Overnight	Return Home	Total Visitors	Camp-Sites	Campsites Total	Visitors in Lodgings	Total Over Nighters	Total Visitors
1997	51,604	9,223	60,827	50,781	60,443	173,753	345,805	0	345,805	73,297	419,101	309,196	482,950	655,001	655,001	728,298
1998	37,563	6,606	44,169	50,084	40,367	70,632	205,253	0	205,253	67,482	272,735	125,691	196,324	330,944	330,944	398,426
1999	51,978	22,764	74,742	86,377	48,753	170,857	380,730	25,546	406,276	74,337	480,613	304,043	474,900	684,773	710,319	784,656
2000	53,428	13,036	66,464	75,254	41,676	137,768	321,163	13,678	334,841	53,919	388,759	245,160	382,928	566,323	580,001	633,920
2001	42,034	13,165	55,199	35,688	20,810	67,715	179,412	7,645	187,057	47,403	234,460	120,500	188,214	299,911	307,557	354,959
2002	28,378	14,947	43,325	31,473	32,494	101,072	208,364	28,378	236,742	25,652	262,394	179,859	280,930	388,222	416,600	442,253
2003	50,379	17,675	68,054	57,153	25,932	92,857	243,995	4,128	248,124	29,979	278,103	165,240	258,097	409,235	413,364	443,343
2004	50,809	33,728	84,537	95,229	40,986	104,617	325,370	12,822	338,192	31,202	369,395	186,168	290,786	511,539	524,361	555,563
2005	75,901	39,814	115,716	75,901	65,793	179,645	437,054	18,975	456,030	32,452	488,481	319,680	499,325	756,735	775,710	808,162
2006	69,710	22,645	92,355	76,907	37,566	153,766	360,594	4,174	364,768	35,439	400,207	273,628	427,394	634,222	638,396	673,835
2006*	65,841	53,609	119,451	101,782	26,805	427,818	675,856		750,951							

Expenditure in thousands of Argentine Pesos

							Carnival Visitors					Non Carnival Visitors			All Visitors	
Years	Hotel	Para-Hotels	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Camp-Sites	Overall Average	Sleep in Vehicle	Total Overnight	Return Home	Total Visitors	Camp-Sites	Campsites Total	Visitors in Lodgings	Total Over Nighters	Total Visitors
1997	3,755	565	4,320	3,157	2,026	5,540	15,044	0	15,044	1,616	16,660	9,859	15,400	24,903	24,903	26,519
1998	2,285	339	2,624	2,604	1,131	1,883	8,242	0	8,242	1,244	9,486	3,351	5,234	11,593	11,593	12,837
1999	3,330	1,229	4,558	4,729	1,439	4,797	15,522	744	16,266	1,443	17,709	8,536	13,333	24,058	24,802	26,245
2000	3,848	791	4,639	4,631	1,382	4,348	15,001	448	15,448	1,177	16,625	7,738	12,086	22,738	23,186	24,363
2001	3,940	1,040	4,979	2,858	898	2,781	11,518	326	11,843	1,346	13,190	4,950	7,731	16,467	16,793	18,140
2002	1,585	703	2,288	1,502	836	2,474	7,100	720	7,820	434	8,254	4,402	6,876	11,502	12,222	12,657
2003	4,376	1,293	5,670	4,243	1,038	3,535	14,485	163	14,648	789	15,437	6,291	9,826	20,776	20,939	21,728
2004	4,729	2,644	7,373	7,574	1,757	4,267	20,971	542	21,513	880	22,393	7,593	11,860	28,564	29,106	29,986
2005	6,969	3,080	10,049	5,955	2,782	7,228	26,015	792	26,807	903	27,710	12,863	20,092	38,878	39,670	40,573
2006	8,262	2,261	10,523	7,789	2,051	7,986	28,349	225	28,574	1,273	29,846	14,212	22,198	42,561	42,786	44,058
2006*	5,959	4,069	10,028	7,808	1,114	16,877	35,827									35,827

Expenditure in thousands of US Dollars

							Carnival Visitors					Non Carnival Visitors			All Visitors	
Years	Hotel	Para-Hotels	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Camp-Sites	Overall Average	Sleep in Vehicle	Total Overnight	Return Home	Total Visitors	Camp-Sites (2)	Campsites Total	Visitors in Lodgings	Total Over Nighters	Total Visitors
1997	3,755	565	4,320	3,157	2,026	5,540	15,044	0	15,044	1,616	16,660	9,859	15,400	24,903	24,903	26,519
1998	2,285	339	2,624	2,604	1,131	1,883	8,242	0	8,242	1,244	9,486	3,351	5,234	11,593	11,593	12,837
1999	3,330	1,229	4,558	4,729	1,439	4,797	15,522	744	16,266	1,443	17,709	8,536	13,333	24,058	24,802	26,245
2000	3,848	791	4,639	4,631	1,382	4,348	15,001	448	15,448	1,177	16,625	7,738	12,086	22,738	23,186	24,363
2001	3,940	1,040	4,979	2,858	898	2,781	11,518	326	11,843	1,346	13,190	4,950	7,731	16,467	16,793	18,140
2002	834	370	1,204	791	440	1,302	3,737	379	4,116	228	4,344	2,317	3,619	6,054	6,433	6,661
2003	1,306	386	1,692	1,266	310	1,055	4,324	49	4,373	236	4,608	1,878	2,933	6,202	6,250	6,486
2004	1,642	918	2,560	2,630	610	1,482	7,282	188	7,470	306	7,775	2,637	4,118	9,918	10,106	10,412
2005	2,315	1,023	3,338	1,979	924	2,401	8,643	263	8,906	300	9,206	4,273	6,675	12,916	13,179	13,479
2006	2,682	734	3,416	2,529	666	2,593	9,204	73	9,277	413	9,690	4,614	7,207	13,818	13,891	14,305
2006*	1,935	1,321	3,256	2,535	362	5,480	11,632									11,632

Expenditure in thousands of 1993 Argentine Pesos

							Carnival Visitors					Non Carnival Visitors			All Visitors	
Years	Hotel	Para-Hotels	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Camp-Sites	Overall Average	Sleep in Vehicle	Total Overnight	Return Home	Total Visitors	Camp-Sites	Campsites Total	Visitors in Lodgings	Total Over Nighters	Total Visitors
1997	3,557	536	4,093	2,991	1,919	5,249	14,252	0	14,252	1,531	15,783	9,340	14,589	23,592	23,592	25,123
1998	2,203	326	2,529	2,510	1,090	1,815	7,944	0	7,944	1,199	9,143	3,230	5,045	11,174	11,174	12,373
1999	3,269	1,206	4,475	4,643	1,412	4,710	15,240	730	15,970	1,417	17,387	8,381	13,090	23,621	24,351	25,768

2000	3,739	769	4,508	4,500	1,343	4,225	14,577	435	15,012	1,143	16,155	7,519	11,744	22,096	22,531	23,674
2001	3,871	1,021	4,892	2,808	883	2,733	11,316	320	11,636	1,323	12,959	4,863	7,596	16,179	16,499	17,822
2002	1,193	529	1,722	1,130	629	1,862	5,343	542	5,885	327	6,212	3,313	5,175	8,656	9,198	9,525
2003	2,981	881	3,862	2,890	707	2,408	9,866	111	9,977	537	10,514	4,284	6,692	14,150	14,261	14,798
2004	2,949	1,649	4,598	4,723	1,096	2,661	13,077	338	13,415	549	13,964	4,735	7,396	17,812	18,150	18,699
2005	3,995	1,766	5,761	3,414	1,595	4,144	14,915	454	15,369	518	15,886	7,375	11,519	22,289	22,743	23,261
2006	4,368	1,195	5,563	4,118	1,084	4,222	14,988	119	15,107	673	15,780	7,514	11,736	22,502	22,621	23,294
2006*	3,151	2,151	5,302	4,128	589	8,923	18,942									18,942

Available Sleeping Place - Nights

	Hotel	Para-Hotels	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Camp-Sites	Total Lodgings	Sleeping Place Nights Camp-Sites	Camp-Sites	Total Lodgings
2005	51,120	119,760	170,880	90,000	180,000	1,161,600	1,602,480	1,161,600	1,161,600	1,602,480

Implicit Sleeping Place Occupancy

	Occupancy by Carnival Visitors							Rate of Occupancy (%)		
	Hotel	Para-Hotels	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Camp-Sites	Total in Lodgings	Non Carnival Visitors Camp-Sites	All Visitors Camp-Sites	Total Lodgings
1997	100.9%	7.7%	35.6%	56.4%	33.6%	15.0%	21.6%	26.6%	41.6%	45.4%
1998	73.5%	5.5%	25.8%	55.6%	22.4%	6.1%	12.8%	10.8%	16.9%	24.9%
1999	101.7%	19.0%	43.7%	96.0%	27.1%	14.7%	23.8%	26.2%	40.9%	49.0%
2000	104.5%	10.9%	38.9%	83.6%	23.2%	11.9%	20.0%	21.1%	33.0%	39.6%
2001	82.2%	11.0%	32.3%	39.7%	11.6%	5.8%	11.2%	10.4%	16.2%	22.2%
2002	55.5%	12.5%	25.4%	35.0%	18.1%	8.7%	13.0%	15.5%	24.2%	27.6%
2003	98.6%	14.8%	39.8%	63.5%	14.4%	8.0%	15.2%	14.2%	22.2%	27.7%
2004	99.4%	28.2%	49.5%	105.8%	22.8%	9.0%	20.3%	16.0%	25.0%	34.7%
2005	148.5%	33.2%	67.7%	84.3%	36.6%	15.5%	27.3%	27.5%	43.0%	50.4%
2006	136.4%	18.9%	54.0%	85.5%	20.9%	13.2%	22.5%	23.6%	36.8%	42.0%
2006*	128.8%	44.8%	69.9%	113.1%	14.9%	36.8%	42.2%			

Carnival Tickets Sold

Gualeguaychu Carnival Tickets Sold

	Adults	Children	Total	Visitors	Local Residents	% Visitors in Lodgings	Number of Visitors in Lodgings
1994	149,317	40,762	190,079	171,071	19,008	65.8%	112,633
1995	161,172	34,886	196,058	176,452	19,606	63.1%	111,412
1996	151,995	29,262	181,257	163,131	18,126	62.1%	101,305
1997	184,866	35,185	220,051	198,046	22,005	63.0%	124,749
1998	137,549	23,491	161,040	144,936	16,104	53.4%	77,454
1999	189,495	41,546	231,041	207,937	23,104	60.2%	125,199
2000	157,482	28,630	186,112	167,501	18,611	65.0%	108,943
2001	120,377	23,411	143,788	129,409	14,379	60.8%	78,655
2002	103,734	17,554	121,288	109,159	12,129	67.3%	73,497
2003	125,120	19,267	144,387	129,948	14,439	75.7%	98,306
2004	138,027	18,211	156,238	140,614	15,624	74.9%	105,264
2005	165,871	21,440	187,311	168,580	18,731	77.4%	130,464
2006	145,872	18,404	164,276	147,848	16,428	75.2%	111,123
2006*			185,610				

Note: Based on the Annual Survey of Carnival Visitors by Estudio Fernandez Tesone, Gualeguaychu and on information of the Consejo Mixto Gualeguaychu Turismo (CMGT).
2006* is the data from the CMGT.

Peso to Dollar Exchange Rate
GDP Deflator

		FX Rate AR$/US$	GDP Deflator
1997	1997	1.00	105.6
1998	1998	1.00	103.8
1999	1999	1.00	101.9
2000	2000	1.00	102.9
2001	2001	1.00	101.8
2002	2002	1.90	132.9
2003	2003	3.35	146.8
2004	2004	2.88	160.4
2005	2005	3.01	174.4
2006	2006	3.08	189.1
2006*	2006*	3.08	189.1

Table A16
Argentina
Gualeguaychu
Tourism Profile January - February 2005

	Hotel	Para-Hotel	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Camp-Sites	Total in Lodgings	Sleep in Vehicle	Total Over-Nighters	Return Home	Grand Total
No of visitors	22,657	11,885	34,542	22,657	19,640	107,117	183,956	5,664	189,620	32,452	222,072
Percentage Visitor distribution by lodging	10.2%	5.4%	15.6%	10.2%	8.8%	48.2%	82.8%	2.6%	85.4%	14.6%	100.0%
Average length of stay (Days)	3.4	3.4	3.4	3.4	3.4	4.7	4.1	3.4	4.1	1.0	3.6
Visitor-nights	75,901	39,815	115,716	75,901	65,794	499,325	756,736	18,974	775,710	32,452	808,162
No of rooms by lodging	284	499	783	500	1,000	4,840	7,123	N.A.	N.A.	N.A.	N.A.
Sleeping places per room	3.0	4.0	3.6	3.0	3.0	4.0	3.7	N.A.	N.A.	N.A.	N.A.
Available sleeping nights	51,120	119,760	170,880	90,000	180,000	1,161,600	1,602,480	N.A.	N.A.	N.A.	N.A.
Sleeping nights occupancy %	148.5%	33.2%	67.7%	84.3%	36.6%	43.0%	47.2%	N.A.	N.A.	N.A.	N.A.
Expenditures per capita/day (AR$)	91.82	77.35	86.84	78.46	42.29	40.24	51.38	41.74	51.14	27.82	50.21
Total expenditure ('000 AR$)	6,969	3,080	10,049	5,955	2,782	20,093	38,879	792	39,671	903	40,574
Expenditures per capita/day (US$)	30.50	25.70	28.85	26.07	14.05	13.37	17.07	13.87	16.99	9.24	16.68
Total expenditure ('000 US$)	2,315	1,023	3,339	1,978	924	6,675	12,917	263	13,180	300	13,480

Table A17 Argentina Gualeguaychu Tourism Profile March - December 2005					
	Hotels	Para-Hotels	Hotels & Para Hotels	Camp-sites	Total
No of visitors	35,167	39,081	74,248	37,635	111,883
Percentage Visitor distribution by lodging	31.4%	34.9%	66.4%	33.6%	100.0%
Average length of stay (Days)	1.7	2.0	1.9	2.0	1.9
Visitor-nights	59,960	78,905	138,864	75,270	214,134
No of rooms by lodging	284	499	783	4,840	5,623
Sleeping places per room	2.6	3.8	3.4	4.0	3.9
Available sleeping nights	225,905	585,190	811,095	5,904,800	6,715,895
Sleeping nights occupancy %	26.5%	13.5%	17.1%	1.3%	3.2%
Expenditures per capita/day (AR$)	91.82	77.35	83.60	40.24	68.36
Total expenditure ('000 AR$)	5,506	6,103	11,609	3,029	14,638
Expenditures per capita/day (US$)	30.50	25.70	27.77	13.37	22.71
Total expenditure ('000 US$)	1,829	2,028	3,857	1,006	4,863

Table A18
Argentina
Gualeguaychu
Tourism Profile 2005

	Hotel	Para-Hotel	Hotels + Para Hotel	Rooming Houses	Friends/ Relatives	Camp-Sites	Total in Lodgings	Sleep in Vehicle	Total Over-Nighters	Return Home	Grand Total
No of visitors	57,824	50,966	108,790	22,657	19,640	144,752	295,839	5,664	301,503	32,452	333,955
Percentage Visitor distribution by lodging	17.3%	15.3%	32.6%	6.8%	5.9%	43.3%	88.6%	1.7%	90.3%	9.7%	100.0%
Average length of stay (Days)	2.3	2.3	2.3	3.4	3.4	4.0	3.3	3.4	3.3	1.0	3.2
Visitor-nights	135,861	118,719	254,580	75,901	65,794	574,595	970,870	18,974	989,845	32,452	1,022,297
No of rooms by lodging	289	493	782	500	1,000	5,000	7,282	N.A.	N.A.	N.A.	N.A.
Sleeping places per room	2.6	3.9	3.4	0.5	0.5	3.9	3.1	N.A.	N.A.	N.A.	N.A.
Available sleeping nights	277,025	704,950	981,975	90,000	180,000	7,066,400	8,318,375	N.A.	N.A.	N.A.	N.A.
Sleeping nights occupancy %	49.0%	16.8%	25.9%	84.3%	36.6%	8.1%	11.7%	N.A.	N.A.	N.A.	N.A.
Expenditures per capita/day (AR$)	91.82	77.35	85.07	78.46	42.29	40.24	55.12	41.74	54.87	27.82	54.01
Total expenditure ('000 AR$)	12,475	9,183	21,658	5,955	2,782	23,122	53,517	792	54,309	903	55,212
Expenditures per capita/day (US$)	30.50	25.70	28.26	26.07	14.05	13.37	18.31	13.87	18.23	9.24	17.94
Total expenditure ('000 US$)	4,144	3,051	7,195	1,978	924	7,682	17,780	263	18,043	300	18,343

Table A19
URUGUAY
INDICATORS OF IMPORTANCE OF INTERNATIONAL TOURISM
1988 - 2004

YEAR	GROSS DOMESTIC PRODUCT (US$ Millions)	EXPORTS GOODS (f.o.b.) (US$ Millions)	TOURISM RECEIPTS (US$ Millions)	VISITOR ARRIVALS (thousands)	IMPLICIT EXPENDITURE PER VISITOR (US$)	TOURIST EXPENDITURES PERCENTAGE OF GDP (%)	TOURIST EXPENDITURES PERCENTAGE OF EXPORTS (%)
1988	8,216	1,405	203	1,036	196	2.5%	14.4%
1989	8,672	1,599	228	1,240	184	2.6%	14.3%
1990	9,299	1,693	238	1,267	188	2.6%	14.1%
1991	11,206	1,605	333	1,510	220	3.0%	20.7%
1992	12,878	1,703	381	1,802	212	3.0%	22.4%
1993	14,991	1,645	447	2,003	223	3.0%	27.2%
1994	17,466	1,913	632	2,175	291	3.6%	33.0%
1995	19,298	2,148	611	2,177	281	3.2%	28.4%
1996	20,515	2,449	717	2,259	317	3.5%	29.3%
1997	21,704	2,793	827	2,463	336	3.8%	29.6%
1998	22,377	2,829	761	2,324	328	3.4%	26.9%
1999	20,920	2,291	704	2,273	310	3.4%	30.7%
2000	20,080	2,384	713	2,236	319	3.5%	29.9%
2001	18,562	2,140	611	2,136	286	3.3%	28.5%
2002	12,295	1,933	351	1,354	259	2.9%	18.2%
2003	11,206	2,205	345	1,508	229	3.1%	15.6%
2004	13,239	2,922	494	1,871	264	3.7%	16.9%

Source: Ministry of Tourism and Sports and Central Bank of Uruguay
Note: Tourism receipts include imputed rents paid to non-resident property owners.

Table A 20
Uruguay
Visitors by Nationality 1988 - 2005
(In thousands)

Year	Argentines	Brazilians	Chileans	Paraguayans	Uruguayans*	Others	Total
1988	633.2	102.7	16.6	8.8	192.4	82.2	1,036.0
1989	817.1	113.4	16.0	10.4	197.9	85.7	1,240.4
1990	742.2	143.9	18.2	11.1	263.7	87.8	1,267.0
1991	1,023.8	128.2	16.3	11.9	247.8	82.0	1,510.0
1992	1,311.9	121.8	18.3	12.0	249.3	88.4	1,801.7
1993	1,493.2	124.9	19.6	13.2	257.6	94.1	2,002.5
1994	1,579.7	144.0	22.1	15.6	308.6	105.4	2,175.5
1995	1,478.0	178.2	25.1	20.8	336.4	138.4	2,176.9
1996	1,491.8	194.0	25.9	20.1	367.9	158.8	2,258.6
1997	1,602.8	200.3	29.4	22.0	443.6	164.3	2,462.5
1998	1,513.6	212.2	24.5	20.3	389.7	163.7	2,324.0
1999	1,532.7	153.7	22.5	20.5	384.9	158.8	2,273.2
2000	1,510.4	140.9	22.1	21.2	362.5	178.8	2,235.9
2001	1,478.6	121.9	20.7	26.4	347.7	141.3	2,136.4
2002	813.3	118.4	18.7	18.0	258.5	127.0	1,353.9
2003	866.6	151.4	32.8	17.7	264.8	174.8	1,508.1
2004	1,108.6	187.7	38.7	19.2	301.2	215.4	1,870.9
2005	1,107.5	197.7	42.2	20.2	284.8	264.7	1,917.0
(Percentage distribution)							
Year	Argentines	Brazilians	Chileans	Paraguayans	Uruguayans*	Others	Total
1988	61.1%	9.9%	1.6%	0.9%	18.6%	7.9%	100.0%
1989	65.9%	9.1%	1.3%	0.8%	16.0%	6.9%	100.0%
1990	58.6%	11.4%	1.4%	0.9%	20.8%	6.9%	100.0%
1991	67.8%	8.5%	1.1%	0.8%	16.4%	5.4%	100.0%
1992	72.8%	6.8%	1.0%	0.7%	13.8%	4.9%	100.0%
1993	74.6%	6.2%	1.0%	0.7%	12.9%	4.7%	100.0%
1994	72.6%	6.6%	1.0%	0.7%	14.2%	4.8%	100.0%
1995	67.9%	8.2%	1.2%	1.0%	15.5%	6.4%	100.0%
1996	66.1%	8.6%	1.1%	0.9%	16.3%	7.0%	100.0%
1997	65.1%	8.1%	1.2%	0.9%	18.0%	6.7%	100.0%
1998	65.1%	9.1%	1.1%	0.9%	16.8%	7.0%	100.0%
1999	67.4%	6.8%	1.0%	0.9%	16.9%	7.0%	100.0%
2000	67.6%	6.3%	1.0%	0.9%	16.2%	8.0%	100.0%
2001	69.2%	5.7%	1.0%	1.2%	16.3%	6.6%	100.0%
2002	60.1%	8.7%	1.4%	1.3%	19.1%	9.4%	100.0%
2003	57.5%	10.0%	2.2%	1.2%	17.6%	11.6%	100.0%
2004	59.3%	10.0%	2.1%	1.0%	16.1%	11.5%	100.0%
2005	57.8%	10.3%	2.2%	1.1%	14.9%	13.8%	100.0%
(Index in terms of peak year = 1997)							
Year	Argentines	Brazilians	Chileans	Paraguayans	Uruguayans*	Others	Total
1988	39.5	51.3	56.6	40.0	43.4	50.0	42.1
1989	51.0	56.6	54.3	47.3	44.6	52.2	50.4
1990	46.3	71.8	61.9	50.4	59.5	53.4	51.5
1991	63.9	64.0	55.3	53.8	55.9	49.9	61.3
1992	81.8	60.8	62.1	54.5	56.2	53.8	73.2
1993	93.2	62.3	66.6	59.8	58.1	57.2	81.3
1994	98.6	71.9	75.2	70.9	69.6	64.1	88.3
1995	92.2	88.9	85.4	94.5	75.8	84.2	88.4
1996	93.1	96.9	88.1	91.3	82.9	96.6	91.7
1997	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1998	94.4	105.9	83.3	92.0	87.9	99.6	94.4
1999	95.6	76.7	76.5	93.1	86.8	96.6	92.3
2000	94.2	70.3	75.0	96.1	81.7	108.8	90.8
2001	92.2	60.8	70.2	119.6	78.4	86.0	86.8
2002	50.7	59.1	63.5	81.8	58.3	77.3	55.0
2003	54.1	75.6	111.3	80.4	59.7	106.4	61.2
2004	69.2	93.7	131.4	87.3	67.9	131.1	76.0
2005	69.1	98.7	143.3	91.5	64.2	161.1	77.8

* Not resident of Uruguay
Source: Ministry of Tourism and Sports

Table A21 Uruguay Number of Visitors by Nationality (1st Quarter)						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	118,722	132,901	80,560	79,509	89,302	82,141
Argentines	746,747	741,003	365,419	332,936	498,334	526,262
Brazilians	44,385	36,623	35,214	37,002	49,410	57,305
Paraguayans	7,873	9,010	7,019	6,528	7,649	8,000
Chileans	7,236	7,214	7,602	13,696	19,168	20,146
North Americans					6,743	17,253
Other America	15,589	11,670	7,174	8,736	5,041	6,426
Europe	30,174	21,693	18,404	21,904	23,561	35,298
Not known	29,181	15,030	12,025	18,426	27,640	24,927
Total	999,907	975,144	533,417	518,737	726,848	777,758
Percentage of Visitors by Nationality						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	11.9%	13.6%	15.1%	15.3%	12.3%	10.6%
Argentines	74.7%	76.0%	68.5%	64.2%	68.6%	67.7%
Brazilians	4.4%	3.8%	6.6%	7.1%	6.8%	7.4%
Paraguayans	0.8%	0.9%	1.3%	1.3%	1.1%	1.0%
Chileans	0.7%	0.7%	1.4%	2.6%	2.6%	2.6%
North Americans					0.9%	2.2%
Other America	1.6%	1.2%	1.3%	1.7%	0.7%	0.8%
Europe	3.0%	2.2%	3.5%	4.2%	3.2%	4.5%
Not known	2.9%	1.5%	2.3%	3.6%	3.8%	3.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Percentage of Annual Visitors in 1st Quarter						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	32.7%	38.2%	31.2%	30.0%	29.6%	28.8%
Argentines	49.4%	50.1%	44.9%	38.4%	45.0%	47.5%
Brazilians	31.5%	30.0%	29.7%	24.4%	26.3%	29.0%
Paraguayans	37.2%	43.6%	39.0%	36.8%	39.8%	39.7%
Chileans	32.8%	27.4%	40.7%	41.8%	49.6%	47.8%
North Americans					27.9%	42.2%
Other America	34.2%	29.2%	25.8%	25.0%	33.5%	33.4%
Europe	35.5%	32.6%	29.8%	30.9%	28.4%	36.8%
Not known	60.7%	43.3%	32.1%	26.7%	29.7%	22.9%
Total	44.7%	45.6%	39.4%	34.4%	38.9%	40.6%

Table A22 Uruguay Length of Stay in Days by Nationality (1st Quarter)						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	12.5	10.7	10.6	10.3	9.4	10.8
Argentines	7.8	7.8	9.2	9.3	9.1	8.7
Brazilians	6.9	7.6	7.4	7.6	7.5	7.2
Paraguayans	17.5	15.4	13.7	14.1	15.1	16.1
Chileans	9.6	7.7	11.5	9.5	9.0	8.9
North Americans					8.2	9.0
Other America	10.0	7.2	9.3	8.7	8.1	7.7
Europe	12.4	11.0	12.8	13.7	13.1	11.0
Not known	12.2	16.6	10.6	12.7	7.7	12.1
Total	8.7	8.5	9.5	9.7	9.1	9.1
(Average of all Quarters)						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	8.4	7.8	7.6	7.6	7.0	7.3
Argentines	6.1	6.1	6.6	6.7	6.9	6.6
Brazilians	5.4	5.3	5.2	5.2	5.4	5.1
Paraguayans	11.1	11.8	10.7	10.6	9.9	10.2
Chileans	9.0	7.2	9.1	7.5	7.9	7.6
North Americans					7.9	8.3
Other America	10.4	8.0	7.6	8.8	6.7	7.1
Europe	9.8	8.9	10.7	11.3	10.3	11.2
Not known	9.1	10.7	12.1	8.7	5.9	7.2
Total	6.8	6.6	7.1	7.1	6.9	6.9
Year 2005						
Nationality	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Year	Q1 % Year
Uruguayans	10.8	7.6	5.8	5.3	7.3	147%
Argentines	8.7	4.9	4.6	4.6	6.6	132%
Brazilians	7.2	4.8	4.0	4.2	5.1	140%
Paraguayans	16.1	6.0	6.8	6.3	10.2	157%
Chileans	8.9	6.8	6.8	5.7	7.6	118%
North Americans	9.0	8.4	9.2	6.2	8.3	108%
Other America	7.7	10.0	4.9	5.6	7.1	109%
Europe	11.0	15.0	12.5	7.9	11.2	99%
Not known	12.1	8.5	2.2	6.4	7.2	169%
Total	9.1	6.3	5.2	5.1	6.9	132%

Source: Ministry of Tourism and Sports

Table A23 Uruguay Expenditure in US Dollars '000s by Visitors by Nationality (Sum of all Quarters)						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	89,807	78,948	44,287	40,008	45,688	55,072
Argentines	408,366	355,744	164,646	157,919	248,114	258,402
Brazilians	42,550	36,833	33,726	38,732	62,326	59,157
Paraguayans	10,787	10,400	6,647	6,118	8,487	8,132
Chileans	11,381	8,101	6,843	10,215	15,321	16,086
North Americans					13,191	23,985
Other America	21,824	21,999	10,106	12,656	4,861	8,166
Europe	42,302	29,994	27,775	28,052	37,909	59,625
Not known	24,762	18,679	20,647	24,406	18,746	51,617
Total	651,780	560,699	314,677	318,106	454,645	540,242
Percentage of Expenditure by Visitors by Nationality						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	13.8%	14.1%	14.1%	12.6%	10.0%	10.2%
Argentines	62.7%	63.4%	52.3%	49.6%	54.6%	47.8%
Brazilians	6.5%	6.6%	10.7%	12.2%	13.7%	11.0%
Paraguayans	1.7%	1.9%	2.1%	1.9%	1.9%	1.5%
Chileans	1.7%	1.4%	2.2%	3.2%	3.4%	3.0%
North Americans					2.9%	4.4%
Other America	3.3%	3.9%	3.2%	4.0%	1.1%	1.5%
Europe	6.5%	5.3%	8.8%	8.8%	8.3%	11.0%
Not known	3.8%	3.3%	6.6%	7.7%	4.1%	9.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Expenditure by Nationality (2000=100)						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	100	88	49	45	51	61
Argentines	100	87	40	39	61	63
Brazilians	100	87	79	91	146	139
Paraguayans	100	96	62	57	79	75
Chileans	100	71	60	90	135	141
North Americans						
Other America	100	101	46	58	22	37
Europe	100	71	66	66	90	141
Not known	100	75	83	99	76	208
Total	100	86	48	49	70	83
Percentage of Expenditure in 1st Quarter						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	47.7%	48.1%	45.2%	35.6%	37.0%	34.3%
Argentines	63.5%	62.2%	66.9%	49.5%	56.7%	58.9%
Brazilians	38.8%	34.9%	41.0%	26.4%	34.8%	35.5%
Paraguayans	59.1%	51.8%	56.4%	52.3%	64.6%	62.9%
Chileans	29.6%	39.9%	52.3%	51.4%	60.3%	58.7%
North Americans					27.7%	50.5%
Other America	42.8%	24.3%	29.1%	30.3%	37.3%	30.9%
Europe	49.2%	36.1%	37.9%	35.1%	27.3%	35.2%
Not known	76.1%	53.7%	35.9%	31.2%	23.1%	39.5%
Total	57.9%	54.7%	54.7%	41.6%	47.1%	48.6%

Source: Ministry of Tourism and Sports

Table A24 Uruguay Average Expenditure in US$ per Visitor by Nationality						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	248	227	171	151	152	193
Argentines	270	241	202	182	224	233
Brazilians	302	302	285	256	332	299
Paraguayans	509	504	369	345	441	403
Chileans	515	307	366	312	396	382
North Americans					546	587
Other America	478	550	364	363	323	424
Europe	497	451	450	395	457	622
Not known	515	538	552	354	201	475
Total	292	262	232	211	243	282
Average Expenditure in US$ per Visitor - Day by Nationality						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	29.65	28.98	22.57	19.79	21.71	26.36
Argentines	44.27	39.68	30.71	27.32	32.49	35.46
Brazilians	56.16	57.09	54.60	49.11	61.37	58.25
Paraguayans	46.07	42.50	34.43	32.71	44.72	39.41
Chileans	57.27	42.84	40.28	41.78	50.22	50.53
North Americans					69.39	70.65
Other America	46.00	68.92	47.68	41.09	48.50	60.11
Europe	50.67	50.74	41.93	34.99	44.24	55.69
Not known	56.48	50.09	45.66	40.65	34.20	66.21
Total	42.90	39.90	32.67	29.64	35.12	40.80
Average Expenditure in US$ per 1st Quarter Visitor by Nationality						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	361	286	248	179	189	230
Argentines	347	298	302	235	282	289
Brazilians	372	351	393	277	439	366
Paraguayans	810	598	534	490	716	639
Chileans	465	448	471	384	482	469
North Americans					542	701
Other America	600	458	410	438	360	393
Europe	689	499	571	449	440	594
Not known	646	667	617	414	156	819
Total	377	315	323	255	295	338
Average Expenditure in US$ per 1st Quarter Visitor - Day by Nationality						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	28.92	26.68	23.42	17.38	20.12	21.31
Argentines	44.41	38.27	32.78	25.25	31.02	33.24
Brazilians	54.00	46.19	53.10	36.39	58.54	50.86
Paraguayans	46.25	38.84	38.98	34.74	47.44	39.68
Chileans	48.42	58.16	40.97	40.39	53.60	52.70
North Americans					66.05	77.94
Other America	59.86	63.61	44.07	50.38	44.43	51.06
Europe	55.62	45.36	44.64	32.79	33.56	54.02
Not known	52.96	40.19	58.21	32.58	20.31	67.67
Total	43.29	37.20	33.84	26.33	32.20	37.09

Source: Ministry of Tourism and Sports

Table A25
Uruguay
Visitors by Type of Lodging 1996 - 2005
(In thousands)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Hotel	520.2	648.8	600.8	585.8	564.3	536.1	316.7	402.1	534.9	587.1
Aparthotel	10.6	7.9	13.0	10.3	16.7	10.1	5.8	7.3	22.5	20.9
Time Share	28.9	53.9	53.0	34.9	31.4	23.9	12.0	9.7	8.1	8.6
Rented House	181.2	198.9	223.1	194.7	196.7	190.2	88.5	110.3	163.6	155.5
Camping	105.4	95.2	74.5	83.9	77.3	66.7	25.7	29.2	30.7	31.3
Own House	278.4	271.5	273.7	230.3	242.9	235.6	164.4	180.9	205.7	224.5
Friends/family	999.8	1,007.5	891.2	905.6	804.4	794.0	622.5	659.1	774.0	763.9
Nothing	106.1	145.9	160.5	199.7	268.0	244.8	95.5	88.1	114.5	109.5
Others	28.0	32.9	34.2	28.1	34.1	35.0	22.9	21.3	16.8	15.8
Total	2,258.6	2,462.5	2,324.0	2,273.2	2,235.9	2,136.4	1,353.9	1,508.1	1,870.9	1,917.0
(Percentage distribution)										
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Hotel	23.0%	26.3%	25.9%	25.8%	25.2%	25.1%	23.4%	26.7%	28.6%	30.6%
Aparthotel	0.5%	0.3%	0.6%	0.5%	0.7%	0.5%	0.4%	0.5%	1.2%	1.1%
Time Share	1.3%	2.2%	2.3%	1.5%	1.4%	1.1%	0.9%	0.6%	0.4%	0.4%
Rented House	8.0%	8.1%	9.6%	8.6%	8.8%	8.9%	6.5%	7.3%	8.7%	8.1%
Camping	4.7%	3.9%	3.2%	3.7%	3.5%	3.1%	1.9%	1.9%	1.6%	1.6%
Own House	12.3%	11.0%	11.8%	10.1%	10.9%	11.0%	12.1%	12.0%	11.0%	11.7%
Friends/family	44.3%	40.9%	38.3%	39.8%	36.0%	37.2%	46.0%	43.7%	41.4%	39.8%
Nothing	4.7%	5.9%	6.9%	8.8%	12.0%	11.5%	7.1%	5.8%	6.1%	5.7%
Others	1.2%	1.3%	1.5%	1.2%	1.5%	1.6%	1.7%	1.4%	0.9%	0.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
(1997 = 100)										
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Hotel	80.2	100.0	92.6	90.3	87.0	82.6	48.8	62.0	82.4	90.5
Aparthotel	134.0	100.0	164.0	129.9	211.4	127.9	73.2	91.8	284.3	264.9
Time Share	53.6	100.0	98.3	64.6	58.3	44.4	22.2	18.1	15.1	16.0
Rented House	91.1	100.0	112.2	97.9	98.9	95.6	44.5	55.5	82.3	78.2
Camping	110.7	100.0	78.3	88.2	81.2	70.1	27.0	30.7	32.3	32.9
Own House	102.5	100.0	100.8	84.8	89.5	86.8	60.5	66.6	75.8	82.7
Friends/family	99.2	100.0	88.5	89.9	79.8	78.8	61.8	65.4	76.8	75.8
Nothing	72.7	100.0	110.0	136.8	183.7	167.8	65.4	60.4	78.5	75.0
Others	85.1	100.0	104.0	85.5	103.7	106.4	69.5	64.6	51.1	47.9
Total	91.7	100.0	94.4	92.3	90.8	86.8	55.0	61.2	76.0	77.8

Source: Ministry of Tourism and Sports

Table A26 Uruguay Number of Visitors by Type of Lodging (1st Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	192,955	185,171	99,096	93,184	176,367	206,614
Apartment Hotel	8,405	5,410	2,011	4,040	7,776	8,337
Time Share	9,860	6,152	6,432	4,619	3,676	3,759
Rented House	155,965	143,048	69,805	71,902	122,794	110,215
Camping	57,344	43,267	17,426	16,548	21,682	22,764
Own House	113,373	111,430	78,165	68,903	79,693	99,256
Friends and Family	264,189	296,346	198,392	200,905	229,123	242,674
Nothing	185,516	171,280	54,872	51,782	81,297	77,672
Others	10,166	7,048	3,448	4,319	4,409	6,336
Not Known	2,134	5,992	3,770	2,535	31	131
Total	999,907	975,144	533,417	518,737	726,848	777,758
Percentage of Visitors by Type of Lodging						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	19.3%	19.0%	18.6%	18.0%	24.3%	26.6%
Apartment Hotel	0.8%	0.6%	0.4%	0.8%	1.1%	1.1%
Time Share	1.0%	0.6%	1.2%	0.9%	0.5%	0.5%
Rented House	15.6%	14.7%	13.1%	13.9%	16.9%	14.2%
Camping	5.7%	4.4%	3.3%	3.2%	3.0%	2.9%
Own House	11.3%	11.4%	14.7%	13.3%	11.0%	12.8%
Friends and Family	26.4%	30.4%	37.2%	38.7%	31.5%	31.2%
Nothing	18.6%	17.6%	10.3%	10.0%	11.2%	10.0%
Others	1.0%	0.7%	0.6%	0.8%	0.6%	0.8%
Not Known	0.2%	0.6%	0.7%	0.5%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Percentage of Annual Visitors in the 1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	34.2%	34.5%	31.3%	23.2%	33.0%	35.2%
Apartment Hotel	50.3%	53.5%	34.8%	55.6%	34.6%	39.8%
Time Share	31.4%	25.7%	53.7%	47.4%	45.3%	43.7%
Rented House	79.3%	75.2%	78.9%	65.2%	75.0%	70.9%
Camping	74.2%	64.8%	67.8%	56.6%	70.5%	72.7%
Own House	46.7%	47.3%	47.6%	38.1%	38.7%	44.2%
Friends and Family	32.8%	37.3%	31.9%	30.5%	29.6%	31.8%
Nothing	69.2%	70.0%	57.5%	58.7%	71.0%	70.9%
Others	39.1%	32.8%	30.6%	32.6%	27.2%	41.7%
Not Known	26.4%	44.3%	32.5%	31.6%	5.0%	24.0%
Total	44.7%	45.6%	39.4%	34.4%	38.9%	40.6%

Source: Ministry of Tourism and Sports

Table A27
Uruguay
Length of Stay in Days by Type of Lodging
(1st Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	5.0	5.3	5.2	6.0	5.8	5.4
Apartment Hotel	12.0	9.4	11.1	10.4	10.7	6.5
Time Share	9.2	9.8	9.7	10.0	8.6	7.9
Rented House	12.9	12.5	13.4	12.9	13.1	12.5
Camping	7.1	6.8	6.4	7.9	7.4	8.5
Own House	19.3	19.1	19.2	19.4	20.3	18.4
Friends and Family	10.6	9.3	9.3	9.4	8.9	9.9
Nothing	0.5	0.5	0.5	0.6	0.5	0.5
Others	7.5	7.7	14.0	12.5	9.9	7.8
Not Known	6.4	12.6	9.4	9.4	0.5	4.0
Total	8.8	8.5	9.6	9.7	9.1	9.1
(Average of all Quarters)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	4.3	4.1	4.3	4.6	4.7	4.3
Apartment Hotel	9.0	7.7	8.9	8.5	6.8	5.5
Time Share	8.1	7.2	8.4	8.4	7.1	7.1
Rented House	11.8	11.0	12.0	11.0	11.5	10.8
Camping	6.5	6.2	6.3	6.9	6.6	7.8
Own House	13.1	12.6	13.0	12.2	12.5	12.6
Friends and Family	7.6	7.2	7.1	7.4	6.9	7.4
Nothing	0.5	0.5	0.5	0.6	0.5	0.5
Others	8.0	8.3	16.9	9.9	8.7	5.9
Not Known	5.1	8.5	6.8	6.8	2.7	4.8
Total	6.9	6.6	7.1	7.1	6.9	6.9
Year 2005						
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005	Q1 % Year
Hotel	5.4	3.9	3.6	3.6	4.3	126%
Apartment Hotel	6.5	4.0	3.7	5.7	5.5	118%
Time Share	7.9	6.7	6.7	6.4	7.1	111%
Rented House	12.5	7.5	5.7	6.4	10.8	116%
Camping	8.5	6.0	5.0	6.7	7.8	109%
Own House	18.4	11.5	7.3	6.9	12.6	146%
Friends and Family	9.9	7.7	6.1	5.7	7.4	133%
Nothing	0.5	0.5	0.5	0.5	0.5	99%
Others	7.8	5.3	4.0	4.6	5.9	132%
Not Known	4.0	4.5	4.0	8.0	4.8	83%
Total	9.1	6.3	5.2	5.1	6.9	132%

Source: Ministry of Tourism and Sports

Table A28
Uruguay
Expenditure by Visitors by Type of Lodging
(In US$'000, Sum of all Quarters)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	182,617	154,610	88,523	103,817	169,389	193,739
Apartment Hotel	7,141	4,105	1,840	2,674	6,870	7,179
Time Share	8,895	7,185	2,898	2,099	2,446	2,939
Rented House	110,261	88,775	42,497	35,296	68,642	68,832
Camping	13,264	9,502	2,644	2,679	3,005	4,769
Own House	131,932	104,678	59,993	61,122	69,777	86,375
Friends and Family	184,447	173,584	105,725	104,432	128,285	170,995
Nothing	4,193	3,881	1,464	796	1,140	1,216
Others	7,056	8,639	5,998	2,921	5,014	4,113
Not Known	1,973	5,742	3,095	2,269	77	84
Total	651,779	560,699	314,677	318,106	454,645	540,241
Percentage of Expenditure by Visitors by Type of Lodging						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	28.0%	27.6%	28.1%	32.6%	37.3%	35.9%
Apartment Hotel	1.1%	0.7%	0.6%	0.8%	1.5%	1.3%
Time Share	1.4%	1.3%	0.9%	0.7%	0.5%	0.5%
Rented House	16.9%	15.8%	13.5%	11.1%	15.1%	12.7%
Camping	2.0%	1.7%	0.8%	0.8%	0.7%	0.9%
Own House	20.2%	18.7%	19.1%	19.2%	15.3%	16.0%
Friends and Family	28.3%	31.0%	33.6%	32.8%	28.2%	31.7%
Nothing	0.6%	0.7%	0.5%	0.3%	0.3%	0.2%
Others	1.1%	1.5%	1.9%	0.9%	1.1%	0.8%
Not Known	0.3%	1.0%	1.0%	0.7%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Expenditure by Type of Lodging (2000=100)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100	85	48	57	93	106
Apartment Hotel	100	57	26	37	96	101
Time Share	100	81	33	24	27	33
Rented House	100	81	39	32	62	62
Camping	100	72	20	20	23	36
Own House	100	79	45	46	53	65
Friends and Family	100	94	57	57	70	93
Nothing	100	93	35	19	27	29
Others	100	122	85	41	71	58
Not Known	100	291	157	115	4	4
Total	100	86	48	49	70	83
Percentage of Expenditure in 1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	40.2%	38.5%	38.2%	26.1%	36.2%	41.3%
Apartment Hotel	65.5%	67.6%	52.6%	64.0%	49.8%	41.0%
Time Share	41.6%	43.6%	70.0%	59.4%	54.6%	52.4%
Rented House	90.7%	88.1%	91.8%	81.2%	85.1%	86.5%
Camping	81.0%	67.4%	78.9%	60.7%	76.5%	80.5%
Own House	73.1%	69.4%	73.7%	57.0%	59.7%	59.7%
Friends and Family	45.4%	44.1%	43.6%	33.4%	34.2%	35.1%
Nothing	50.9%	45.8%	55.2%	42.1%	53.2%	60.5%
Others	26.8%	27.6%	33.2%	38.8%	22.9%	55.8%
Not Known	24.6%	60.2%	42.5%	41.2%	1.1%	29.1%
Total	57.9%	54.7%	54.7%	41.6%	47.1%	48.6%

Source: Ministry of Tourism and Sports

Table A29 Uruguay Average Expenditure in US$ per Visitor by Type of Lodging						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	324	288	280	258	317	330
Apartment Hotel	427	406	318	368	306	343
Time Share	283	300	242	215	301	341
Rented House	561	467	480	320	420	443
Camping	172	142	103	92	98	152
Own House	543	444	365	338	339	385
Friends and Family	229	219	170	158	166	224
Nothing	16	16	15	9	10	11
Others	271	402	532	221	310	270
Not Known	244	425	267	283	123	153
Total	292	262	232	211	243	282
Average Expenditure in US$ per Visitor - Day by Type of Lodging						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	75.45	69.64	65.21	56.31	67.24	77.11
Apartment Hotel	47.28	52.91	35.73	43.14	44.62	62.36
Time Share	35.10	41.53	28.98	25.52	42.13	47.79
Rented House	47.62	42.32	39.94	29.20	36.35	41.17
Camping	26.51	22.83	16.23	13.21	14.70	19.52
Own House	41.32	35.24	28.04	27.69	27.05	30.52
Friends and Family	30.22	30.53	23.81	21.30	24.02	30.15
Nothing	29.49	30.34	30.66	16.16	19.91	22.08
Others	33.85	48.50	31.46	22.31	35.51	45.63
Not Known	47.44	49.99	39.19	41.75	45.79	31.67
Total	42.52	39.88	32.66	29.61	35.12	40.76
Average Expenditure in US$ per 1st Quarter Visitor by Type of Lodging						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	381	321	341	291	348	388
Apartment Hotel	557	513	481	424	440	353
Time Share	375	510	315	270	363	410
Rented House	641	547	559	398	476	540
Camping	187	148	120	98	106	169
Own House	851	652	566	506	523	520
Friends and Family	317	258	232	173	191	248
Nothing	12	10	15	6	7	9
Others	186	338	577	262	260	362
Not Known	228	577	349	369	27	186
Total	377	315	323	255	295	338
Average Expenditure in US$ per 1st Quarter Visitor - Day by Type of Lodging						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	75.69	60.65	65.55	48.43	59.94	71.77
Apartment Hotel	46.25	54.56	43.32	40.73	41.14	54.27
Time Share	40.70	52.01	32.52	26.99	42.21	51.89
Rented House	49.61	43.74	41.71	30.88	36.33	43.22
Camping	26.44	21.76	18.70	12.45	14.33	19.85
Own House	44.09	34.13	29.46	26.07	25.76	28.24
Friends and Family	29.98	27.76	24.97	18.45	21.51	25.01
Nothing	21.71	20.76	29.44	10.79	14.93	18.94
Others	24.87	43.95	41.22	21.00	26.26	46.41
Not Known	35.60	45.81	37.09	39.20	54.97	46.55
Total	43.10	37.08	33.75	26.27	32.21	37.06

Source: Ministry of Tourism and Sports

Table A30
Visitors to Uruguay
According to Principal Destination
1996 - 2005

Principal Destination	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Punta del Este	634,301	662,446	701,895	598,328	560,512	528,622	355,733	428,433	530,889	532,067
Colonia	151,806	173,615	151,086	160,308	172,587	135,148	82,241	79,198	99,851	109,979
Montevideo	701,254	820,415	684,502	686,124	625,814	582,938	467,036	490,033	617,731	683,742
Gold Coast	112,389	133,974	119,719	110,355	96,474	93,569	53,375	61,689	73,135	62,100
Piriapolis	85,368	90,043	84,173	90,145	77,459	66,388	36,276	45,405	66,264	55,945
Rocha	59,137	67,817	72,443	74,452	59,932	65,138	36,077	36,909	58,869	54,357
Littoral	287,544	248,956	293,545	307,653	327,592	343,620	181,617	196,658	220,459	217,749
Known Destinations	2,031,799	2,197,266	2,107,363	2,027,365	1,920,370	1,815,423	1,212,355	1,338,325	1,667,198	1,715,939
In Transit	92,422	92,465	78,260	119,862	194,742	184,027	61,473	66,955	95,770	90,579
Not known	134,395	172,801	138,370	125,937	120,775	136,996	80,044	102,775	107,890	110,531
Total	2,258,616	2,462,532	2,323,993	2,273,164	2,235,887	2,136,446	1,353,872	1,508,055	1,870,858	1,917,049
Percentage Distribution										
Principal Destination	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Punta del Este	31.2%	30.1%	33.3%	29.5%	29.2%	29.1%	29.3%	32.0%	31.8%	31.0%
Colonia	7.5%	7.9%	7.2%	7.9%	9.0%	7.4%	6.8%	5.9%	6.0%	6.4%
Montevideo	34.5%	37.3%	32.5%	33.8%	32.6%	32.1%	38.5%	36.6%	37.1%	39.8%
Gold Coast	5.5%	6.1%	5.7%	5.4%	5.0%	5.2%	4.4%	4.6%	4.4%	3.6%
Piriapolis	4.2%	4.1%	4.0%	4.4%	4.0%	3.7%	3.0%	3.4%	4.0%	3.3%
Rocha	2.9%	3.1%	3.4%	3.7%	3.1%	3.6%	3.0%	2.8%	3.5%	3.2%
Littoral	14.2%	11.3%	13.9%	15.2%	17.1%	18.9%	15.0%	14.7%	13.2%	12.7%
Total known destinations	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1997 = 100										
Principal Destination	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Punta del Este	96	100	106	90	85	80	54	65	80	80
Colonia	87	100	87	92	99	78	47	46	58	63
Montevideo	85	100	83	84	76	71	57	60	75	83
Gold Coast	84	100	89	82	72	70	40	46	55	46
Piriapolis	95	100	93	100	86	74	40	50	74	62
Rocha	87	100	107	110	88	96	53	54	87	80
Littoral	115	100	118	124	132	138	73	79	89	87
Known Destinations	92	100	96	92	87	83	55	61	76	78
In Transit	100	100	85	130	211	199	66	72	104	98
Not known	78	100	80	73	70	79	46	59	62	64
Total	92	100	94	92	91	87	55	61	76	78

Source: Ministry of Tourism and Sports

Table A31
Uruguay
Number of Visitors by Principal Destination
(1st Quarter)

Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	288,323	280,642	187,084	186,831	239,384	260,096
Colonia	52,883	40,755	27,344	20,936	34,828	37,435
Montevideo	152,538	151,561	115,228	98,706	136,837	178,026
Gold Coast	58,118	64,755	32,324	32,559	42,674	39,021
Piriapolis	49,813	41,766	24,523	20,943	38,295	38,338
Rocha	42,280	44,995	21,919	22,435	43,613	31,825
Littoral	144,525	131,970	57,735	57,538	74,704	81,376
In Transit	155,155	149,653	39,779	43,432	74,983	68,556
Not known	56,272	69,047	27,481	35,357	41,530	43,085
Total	999,907	975,144	533,417	518,737	726,848	777,758

Percentage of 1st Quarter Visitors by Principal Destination

Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	28.8%	28.8%	35.1%	36.0%	32.9%	33.4%
Colonia	5.3%	4.2%	5.1%	4.0%	4.8%	4.8%
Montevideo	15.3%	15.5%	21.6%	19.0%	18.8%	22.9%
Gold Coast	5.8%	6.6%	6.1%	6.3%	5.9%	5.0%
Piriapolis	5.0%	4.3%	4.6%	4.0%	5.3%	4.9%
Rocha	4.2%	4.6%	4.1%	4.3%	6.0%	4.1%
Littoral	14.5%	13.5%	10.8%	11.1%	10.3%	10.5%
In Transit	15.5%	15.3%	7.5%	8.4%	10.3%	8.8%
Not known	5.6%	7.1%	5.2%	6.8%	5.7%	5.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

1st Quarter Visitors by Principal Destination (2000=100)

Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	100	97	65	65	83	90
Colonia	100	77	52	40	66	71
Montevideo	100	99	76	65	90	117
Gold Coast	100	111	56	56	73	67
Piriapolis	100	84	49	42	77	77
Rocha	100	106	52	53	103	75
Littoral	100	91	40	40	52	56
In Transit	100	96	26	28	48	44
Not known	100	123	49	63	74	77
Total	100	98	53	52	73	78

Percentage of Annual Visitors in the 1st Quarter

Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	51%	53%	53%	44%	45%	49%
Colonia	31%	30%	33%	26%	35%	34%
Montevideo	24%	26%	25%	20%	22%	26%
Gold Coast	60%	69%	61%	53%	58%	63%
Piriapolis	64%	63%	68%	46%	58%	69%
Rocha	71%	69%	61%	61%	74%	59%
Littoral	44%	38%	32%	29%	34%	37%
In Transit	80%	81%	65%	65%	78%	76%
Not known	47%	50%	34%	34%	38%	39%
Total	45%	46%	39%	34%	39%	41%

Source: Ministry of Tourism and Sports

Table A32
Uruguay
Visitors' Length of Stay in Days by Principal Destination
(1st Quarter)

Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	14.0	13.9	13.9	13.7	13.4	12.9
Colonia	6.2	6.8	5.1	7.1	7.1	6.3
Montevideo	9.3	8.4	7.9	8.8	8.3	8.6
Gold Coast	12.6	10.9	12.6	10.4	11.5	10.2
Piriapolis	10.7	11.2	11.4	14.4	12.1	12.1
Rocha	11.8	11.6	11.1	12.7	12.1	11.6
Littoral	4.5	4.9	4.8	5.0	4.9	5.5
In Transit	0.5	0.5	0.5	0.5	0.6	0.5
Not known	8.5	6.1	8.1	6.5	4.2	6.1
Total	8.7	8.5	9.6	9.7	9.2	9.1
Average of all Quarters						
Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	10.3	10.1	10.2	9.7	9.5	9.4
Colonia	4.2	4.2	4.0	4.9	5.2	4.3
Montevideo	6.6	6.4	6.8	6.8	6.4	6.7
Gold Coast	10.6	9.5	10.2	8.4	9.6	8.8
Piriapolis	9.1	9.5	9.7	10.7	10.0	11.0
Rocha	10.1	10.2	9.8	10.5	10.8	8.9
Littoral	4.2	4.2	4.1	4.4	4.2	4.5
In Transit	0.5	0.5	0.5	0.5	0.6	0.5
Not known	6.9	5.5	6.0	5.8	4.6	4.8
Total	6.9	6.6	7.1	7.1	6.9	6.9
Year 2005						
Principal Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Year	Q1 % Year
Punta del Este	12.9	7.2	5.9	5.7	9.4	137%
Colonia	6.3	3.5	3.3	3.2	4.3	145%
Montevideo	8.6	7.1	6.0	5.5	6.7	128%
Gold Coast	10.2	12.8	5.8	5.0	8.8	116%
Piriapolis	12.1	11.7	6.4	7.0	11.0	110%
Rocha	11.6	6.7	4.5	5.1	8.9	130%
Littoral	5.5	4.0	3.8	3.8	4.5	123%
In Transit	0.5	0.6	0.5	0.5	0.5	99%
Not known	6.1	4.8	3.7	3.9	4.8	126%
Total	9.1	6.3	5.2	5.1	6.9	132%

Table A33
Uruguay
Expenditure by Visitors by Principal Destination
(Sum of all Quarters)

Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	304,140	249,265	148,659	155,723	228,212	243,649
Colonia	30,103	20,454	7,719	9,536	16,329	19,183
Montevideo	172,954	159,214	106,311	103,815	137,727	202,252
Gold Coast	26,990	24,695	10,171	8,553	13,217	11,092
Piriapolis	29,774	22,051	9,035	9,082	15,079	14,424
Rocha	19,377	22,309	8,397	7,014	13,828	13,836
Littoral	40,337	41,844	14,807	15,621	19,494	22,730
In Transit	1,934	1,731	514	359	594	735
Not known	26,170	19,136	9,066	8,403	10,165	12,341
Total	651,779	560,699	314,677	318,106	454,645	540,242
Percentage of Expenditure by Visitors by Principal Destination						
Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	46.7%	44.5%	47.2%	49.0%	50.2%	45.1%
Colonia	4.6%	3.6%	2.5%	3.0%	3.6%	3.6%
Montevideo	26.5%	28.4%	33.8%	32.6%	30.3%	37.4%
Gold Coast	4.1%	4.4%	3.2%	2.7%	2.9%	2.1%
Piriapolis	4.6%	3.9%	2.9%	2.9%	3.3%	2.7%
Rocha	3.0%	4.0%	2.7%	2.2%	3.0%	2.6%
Littoral	6.2%	7.5%	4.7%	4.9%	4.3%	4.2%
In Transit	0.3%	0.3%	0.2%	0.1%	0.1%	0.1%
Not known	4.0%	3.4%	2.9%	2.6%	2.2%	2.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Expenditure by Principal Destination (2000=100)						
Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	100	82	49	51	75	80
Colonia	100	68	26	32	54	64
Montevideo	100	92	61	60	80	117
Gold Coast	100	91	38	32	49	41
Piriapolis	100	74	30	31	51	48
Rocha	100	115	43	36	71	71
Littoral	100	104	37	39	48	56
In Transit	100	89	27	19	31	38
Not known	100	73	35	32	39	47
Total	100	86	48	49	70	83
Percentage of Expenditure in 1st Quarter						
Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	72.4%	70.0%	70.6%	54.5%	58.6%	64.6%
Colonia	40.6%	40.6%	44.6%	28.4%	40.5%	41.1%
Montevideo	30.3%	26.9%	29.8%	21.5%	23.7%	28.2%
Gold Coast	74.2%	78.6%	76.7%	61.9%	69.3%	66.7%
Piriapolis	79.2%	77.2%	82.9%	57.9%	72.3%	72.4%
Rocha	82.0%	76.6%	74.8%	65.7%	81.7%	65.3%
Littoral	41.6%	38.3%	39.3%	27.5%	30.1%	37.2%
In Transit	69.9%	76.5%	67.2%	53.0%	60.1%	65.3%
Not known	56.9%	53.3%	49.4%	33.2%	34.8%	35.7%
Total	57.9%	54.7%	54.7%	41.6%	47.1%	48.6%

Source: Ministry of Tourism and Sports

Table A34 Uruguay Average Expenditure in US$ per Visitor by Destination						
Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	543	472	418	363	430	458
Colonia	174	151	94	120	164	174
Montevideo	276	273	228	212	223	296
Gold Coast	280	264	191	139	181	179
Piriapolis	384	332	249	200	228	258
Rocha	323	342	233	190	235	255
Littoral	123	122	82	79	88	104
In Transit	10	9	8	5	6	8
Not known	217	140	113	82	94	112
Total	292	262	232	211	243	282
Average Expenditure in US$ per Visitor - Day by Principal Destination						
Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	52.52	46.83	41.03	37.66	45.39	48.67
Colonia	41.42	36.39	23.56	24.42	31.75	40.26
Montevideo	41.57	42.70	33.41	31.20	34.85	44.06
Gold Coast	26.38	27.66	18.73	16.54	18.90	20.28
Piriapolis	42.15	35.09	25.78	18.75	22.78	23.51
Rocha	32.05	33.54	23.84	18.15	21.72	28.50
Littoral	29.49	28.89	20.00	18.04	20.98	23.40
In Transit	19.86	19.89	16.73	10.73	10.72	16.06
Not known	31.22	25.21	18.86	14.01	20.69	23.14
Total	42.56	39.78	32.67	29.62	35.06	40.71
Average Expenditure in US$ per 1st Quarter Visitor by Principal Destination						
Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	764	622	561	455	559	605
Colonia	231	204	126	129	190	211
Montevideo	344	283	275	226	238	321
Gold Coast	344	300	241	163	214	190
Piriapolis	473	408	306	251	285	272
Rocha	376	380	287	205	259	284
Littoral	116	122	101	75	78	104
In Transit	9	9	9	4	5	7
Not known	264	148	163	79	85	102
Total	377	315	323	255	295	338
Average Expenditure in US$ per 1st Quarter Visitor - Day by Principal Destination						
Principal Destination	2000	2001	2002	2003	2004	2005
Punta del Este	54.65	44.74	40.33	33.18	41.70	46.92
Colonia	37.22	29.93	24.67	18.22	26.72	33.41
Montevideo	36.90	33.68	34.84	25.72	28.73	37.30
Gold Coast	27.31	27.48	19.16	15.63	18.65	18.58
Piriapolis	44.23	36.40	26.80	17.43	23.53	22.52
Rocha	31.93	32.74	25.82	16.18	21.41	24.47
Littoral	25.88	24.81	21.01	14.93	16.01	18.91
In Transit	17.42	17.69	17.36	8.76	7.94	14.01
Not known	31.11	24.23	20.13	12.13	20.29	16.77
Total	43.15	37.01	33.78	26.26	32.16	37.01

Source: Ministry of Tourism and Sports

Table A35 Uruguay Breakdown of Visitors' Expenditures 1st Quarter (In US$ '000s)						
Breakdown	2000	2001	2002	2003	2004	2005
Lodging	79,029	59,776	33,917	23,601	53,609	66,366
Food	136,024	114,244	68,825	47,130	56,342	62,986
Purchases	51,519	48,333	23,290	20,455	35,554	50,627
Others	110,848	84,444	46,227	41,206	68,613	82,682
Total	377,420	306,797	172,258	132,392	214,117	262,661
Index (2000=100)						
Lodging	100	76	43	30	68	84
Food	100	84	51	35	41	46
Purchases	100	94	45	40	69	98
Others	100	76	42	37	62	75
Total	100	81	46	35	57	70
Per Visitor (In US$)						
Lodging	79	61	64	45	74	85
Food	136	117	129	91	78	81
Purchases	52	50	44	39	49	65
Others	111	87	87	79	94	106
Total	377	315	323	255	295	338
Per Visitor per Day (In US$)						
Lodging	9.03	7.21	6.65	4.68	8.05	9.35
Food	15.55	13.78	13.50	9.35	8.46	8.87
Purchases	5.89	5.83	4.57	4.06	5.34	7.13
Others	12.67	10.19	9.06	8.17	10.31	11.65
Total	43.15	37.01	33.78	26.26	32.16	37.01
Percentage Distribution						
Lodging	20.9%	19.5%	19.7%	17.8%	25.0%	25.3%
Food	36.0%	37.2%	40.0%	35.6%	26.3%	24.0%
Purchases	13.7%	15.8%	13.5%	15.5%	16.6%	19.3%
Others	29.4%	27.5%	26.8%	31.1%	32.0%	31.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Ministry of Tourism and Sports

Table A36
Uruguay
Breakdown of Visitors' Expenditures
2000 - 2005
(In US$ '000s)

Breakdown	2000	2001	2002	2003	2004	2005
Lodging	126,696	101,312	56,120	50,608	104,136	119,978
Food	233,595	205,373	118,391	106,404	116,179	132,755
Purchases	101,266	92,501	47,569	54,971	86,054	127,234
Others	190,222	161,513	92,597	106,124	148,276	160,275
Total	651,780	560,699	314,677	318,106	454,645	540,242
Index (2000=100)						
Lodging	100	80	44	40	82	95
Food	100	88	51	46	50	57
Purchases	100	91	47	54	85	126
Others	100	85	49	56	78	84
Total	100	86	48	49	70	83
Per Visitor (In US$)						
Lodging	57	47	41	34	56	63
Food	104	96	87	71	62	69
Purchases	45	43	35	36	46	66
Others	85	76	68	70	79	84
Total	292	262	232	211	243	282
Per Visitor per Day (In US$)						
Lodging	8.27	7.19	5.83	4.71	8.03	9.04
Food	15.25	14.57	12.29	9.91	8.96	10.00
Purchases	6.61	6.56	4.94	5.12	6.64	9.59
Others	12.42	11.46	9.61	9.88	11.43	12.08
Total	42.56	39.78	32.67	29.62	35.06	40.71
Percentage Distribution						
Lodging	19.4%	18.1%	17.8%	15.9%	22.9%	22.2%
Food	35.8%	36.6%	37.6%	33.4%	25.6%	24.6%
Purchases	15.5%	16.5%	15.1%	17.3%	18.9%	23.6%
Others	29.2%	28.8%	29.4%	33.4%	32.6%	29.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Ministry of Tourism and Sports

Table A37
Uruguay
Breakdown of Visitors' Expenditures
Year 2005
(In US$ '000s)

Breakdown	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Year
Lodging	66,366	14,950	13,819	24,843	119,978
Food	62,986	18,999	19,794	30,976	132,755
Purchases	50,627	21,059	24,175	31,372	127,234
Others	82,682	22,575	20,663	34,356	160,275
Total	262,661	77,583	78,452	121,546	540,242
Quarterly Distribution (%)					
Lodging	55.3%	12.5%	11.5%	20.7%	100.0%
Food	47.4%	14.3%	14.9%	23.3%	100.0%
Purchases	39.8%	16.6%	19.0%	24.7%	100.0%
Others	51.6%	14.1%	12.9%	21.4%	100.0%
Total	48.6%	14.4%	14.5%	22.5%	100.0%
Per Visitor (In US$)					
Lodging	85	55	41	47	63
Food	81	70	58	59	69
Purchases	65	77	71	60	66
Others	106	83	61	65	84
Total	338	284	230	231	282
Per Visitor per Day (In US$)					
Lodging	9.35	8.63	7.83	9.29	9.04
Food	8.87	10.97	11.21	11.59	10.00
Purchases	7.13	12.16	13.69	11.74	9.59
Others	11.65	13.03	11.70	12.85	12.08
Total	37.01	44.78	44.43	45.47	40.71
Percentage Distribution					
Lodging	25.3%	19.3%	17.6%	20.4%	22.2%
Food	24.0%	24.5%	25.2%	25.5%	24.6%
Purchases	19.3%	27.1%	30.8%	25.8%	23.6%
Others	31.5%	29.1%	26.3%	28.3%	29.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Ministry of Tourism and Sports

Table A38
Littoral Region
Number of Visitors by Nationality
1st Quarter

	2000	2001	2002	2003	2004	2005
Uruguayans	13,378	16,387	9,834	9,593	11,465	10,192
Argentines	116,461	108,819	40,345	41,349	57,630	60,216
Brazilians	11,455	5,856	4,220	4,536	4,816	7,913
Paraguayans	238	318	466	188	120	1,613
Chileans	190	91	413	133	192	626
Other America					92	216
Europeans					171	600
Others	2,803	499	2,457	1,739	218	
Total	144,525	131,970	57,735	57,538	74,704	81,376
Percentage of Visitors by Nationality						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	9.3%	12.4%	17.0%	16.7%	15.3%	12.5%
Argentines	80.6%	82.5%	69.9%	71.9%	77.1%	74.0%
Brazilians	7.9%	4.4%	7.3%	7.9%	6.4%	9.7%
Paraguayans	0.2%	0.2%	0.8%	0.3%	0.2%	2.0%
Chileans	0.1%	0.1%	0.7%	0.2%	0.3%	0.8%
Other America					0.1%	0.3%
Europeans					0.2%	0.7%
Others	1.9%	0.4%	4.3%	3.0%	0.3%	
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Visitors by Nationality (2000 = 100)						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	100	122	74	72	86	76
Argentines	100	93	35	36	49	52
Brazilians	100	51	37	40	42	69
Paraguayans	100	134	196	79	50	678
Chileans	100	48	217	70	101	329
Others	100	18	88	62	8	
Total	100	91	40	40	52	56
Visitors by Nationality Percentage by Quarter						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	32.5%	33.2%	26.9%	27.3%	33.0%	34.8%
Argentines	45.9%	39.7%	32.8%	29.6%	35.8%	37.1%
Brazilians	51.1%	36.2%	31.7%	27.6%	22.6%	43.0%
Paraguayans	24.7%	38.4%	47.8%	19.9%	8.3%	33.5%
Chileans	21.0%	25.1%	68.6%	23.8%	32.0%	71.1%
Other America					23.6%	29.5%
Europeans					20.2%	39.4%
Others	32.8%	16.1%	34.6%	43.9%	100.0%	
Total	44.1%	38.4%	31.8%	29.3%	33.9%	37.4%

Source: Ministry of Tourism and Sports

Table A39 Littoral Region Length of Stay in Days by Nationality 1st Quarter						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	7.4	5.7	6.2	5.3	5.0	7.3
Argentines	4.2	4.8	3.9	4.6	4.8	5.2
Brazilians	4.0	5.9	5.4	6.9	5.8	4.2
Paraguayans	3.6	1.4	12.1	3.5	8.0	7.2
Chileans	3.0	2.0	27.9	5.4	4.9	15.8
Other America	11.4		10.5	7.4	8.0	7.0
Europeans	2.4	6.7	7.8	10.1	6.0	6.0
Others	5.9		7.0	0.8	2.2	
Total	4.5	4.9	4.8	4.8	4.9	5.5
Full Year						
Nationality	2000	2001	2002	2003	2004	2005
Uruguayans	5.4	4.4	4.3	4.4	4.0	4.9
Argentines	3.9	4.2	3.7	4.2	4.2	4.3
Brazilians	4.3	4.5	4.9	5.8	4.4	3.9
Paraguayans	3.9	4.8	7.8	4.9	4.9	5.7
Chileans	8.5	4.1	24.6	8.8	5.8	14.0
Other America					6.1	5.0
Europe					7.2	5.5
Not known	3.5	2.2	7.0	1.1	2.2	
Total	4.1	4.2	4.1	4.3	4.2	4.4
Year 2005						
Nationality	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Year	Q1 % Year
Uruguayans	7.3	4.4	4.0	3.0	4.9	148.5%
Argentines	5.2	3.7	3.8	3.9	4.3	120.2%
Brazilians	4.2	3.7	3.2	4.0	3.9	107.9%
Paraguayans	7.2	5.7	4.2	4.9	5.7	126.5%
Chileans	15.8	9.5			14.0	113.0%
Other America	7.0	7.0	4.0	2.0	5.0	139.7%
Europe	6.0	5.9		3.2	5.5	108.6%
Not known						
Total	5.5	3.9	3.8	3.8	4.4	123.6%

Source: Ministry of Tourism and Sports

Table A40 Uruguay Littoral Region Number of Visitors by Type of Lodging 1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	36,226	30,194	12,653	11,694	19,116	23,873
Apartment Hotel	2,731	1,150	131	444	1,169	2,963
Time Share		218			90	108
Rented House	22,896	23,713	6,927	7,351	14,334	15,624
Camping	31,059	27,483	8,794	9,146	11,184	11,041
Own House	3,290	4,670	3,150	1,512	3,771	2,955
Friends and Family	23,108	30,699	18,198	20,494	21,420	20,434
Nothing	21,870	12,339	6,815	6,126	2,986	3,782
Not Known	3,345	1,504	1,067	771	634	596
Total	144,525	131,970	57,735	57,538	74,704	81,376
Percentage of Visitors by Type of Lodging						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	25.1%	22.9%	21.9%	20.3%	25.6%	29.3%
Apartment Hotel	1.9%	0.9%	0.2%	0.8%	1.6%	3.6%
Time Share		0.2%			0.1%	0.1%
Rented House	15.8%	18.0%	12.0%	12.8%	19.2%	19.2%
Camping	21.5%	20.8%	15.2%	15.9%	15.0%	13.6%
Own House	2.3%	3.5%	5.5%	2.6%	5.0%	3.6%
Friends and Family	16.0%	23.3%	31.5%	35.6%	28.7%	25.1%
Nothing	15.1%	9.3%	11.8%	10.6%	4.0%	4.6%
Not Known	2.3%	1.1%	1.8%	1.3%	0.8%	0.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Visitors by Type of Lodging (2000=100)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100	83	35	32	53	66
Apartment Hotel	100	42	5	16	43	108
Rented House	100	104	30	32	63	68
Camping	100	88	28	29	36	36
Own House	100	142	96	46	115	90
Friends and Family	100	133	79	89	93	88
Nothing	100	56	31	28	14	17
Not Known	100	45	32	23	19	18
Total	100	91	40	40	52	56
Percentage of Annual Visitors in the 1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	34.7%	27.8%	27.2%	18.7%	27.3%	31.4%
Apartment Hotel	53.6%	33.9%	7.2%	48.6%	12.7%	31.9%
Time Share		35.9%			11.4%	100.0%
Rented House	51.2%	44.7%	42.7%	29.5%	48.9%	41.5%
Camping	68.5%	59.3%	57.9%	47.9%	62.5%	66.8%
Own House	29.9%	42.2%	31.5%	20.5%	41.4%	39.7%
Friends and Family	32.6%	35.4%	24.9%	31.4%	29.0%	32.7%
Nothing	57.4%	43.1%	47.4%	42.6%	36.4%	54.7%
Not Known	41.8%	28.3%	26.6%	37.0%	31.5%	42.0%
Total	44.1%	38.4%	31.8%	29.3%	33.9%	37.4%

Source: Ministry of Tourism and Sports

Table A41 Uruguay Uruguay River Region Length of Stay in Days by Type of Lodging 1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	3.4	4.2	4.1	5.0	4.2	4.4
Apartment Hotel	7.2	6.4	4.1	6.0	3.3	2.9
Time Share		4.0			6.0	4.0
Rented House	6.7	6.9	5.3	6.0	6.2	5.2
Camping	5.5	5.1	4.8	6.3	5.2	7.4
Own House	6.7	5.7	12.5	7.3	9.1	13.2
Friends and Family	5.2	5.5	5.4	5.1	4.6	6.2
Nothing	0.6	1.0	1.0	0.7	0.5	0.5
Not Known	8.6	5.6	8.3	9.2	3.8	3.5
Total	4.5	5.0	4.9	5.0	4.9	5.5
Full Year						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	4.0	3.8	4.1	4.0	4.0	4.0
Apartment Hotel	6.0	5.5	9.3	5.9	3.4	3.0
Time Share	5.0	3.9	1.9	3.3	4.2	4.0
Rented House	5.7	5.9	5.0	5.5	5.5	4.8
Camping	5.3	5.2	4.7	5.7	4.9	6.7
Own House	5.5	5.0	6.9	7.6	6.4	8.6
Friends and Family	4.3	4.3	4.0	4.5	4.0	4.4
Nothing	0.6	0.8	0.8	0.6	0.5	0.5
Not Known	5.5	3.7	4.2	6.0	5.1	4.0
Total	4.2	4.2	4.1	4.4	4.2	4.4
Year 2005						
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005	Q1 % Year
Hotel	4.4	4.0	3.7	3.8	4.0	110%
Apartment Hotel	2.9	2.8	3.0	3.4	3.0	95%
Time Share	4.0	0.0	2.5	0.0	4.0	100%
Rented House	5.2	4.2	4.6	4.8	4.8	108%
Camping	7.4	4.9	5.0	6.1	6.7	110%
Own House	13.2	4.7	7.2	4.9	8.6	153%
Friends and Family	6.2	3.9	3.3	3.3	4.4	141%
Nothing	0.5	0.5	0.5	0.5	0.5	100%
Not Known	3.5	4.8	3.0	4.1	4.0	89%
Total	5.5	4.0	3.8	3.8	4.4	124%

Source: Ministry of Tourism and Sports

Table A42
Uruguay
Littoral Region
Number of Visitors by Primary Destination

1st Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	24,506	25,369	30,718	29,517
Paysandu	Paysandu	8,332	7,561	9,685	12,640
	Guaviyu Thermal Spas	2,792	2,333	4,337	4,894
Salto	Arapey Thermal Spas	2,131	3,612	5,767	6,697
	Dayman Thermal Spas	14,800	14,881	19,172	19,403
Soriano	Mercedes			3,924	7,285
Others		5,174	3,731	976	940
Unknown			51	125	
Total		57,735	57,538	74,704	81,376
2nd Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	8,250	9,955	14,810	7,430
Paysandu	Paysandu	5,117	5,340	4,748	4,344
	Guaviyu Thermal Spas	1,991	1,569	2,312	2,771
Salto	Arapey Thermal Spas	4,243	3,761	4,653	5,648
	Dayman Thermal Spas	14,816	12,090	18,537	11,751
Soriano	Mercedes			3,718	3,111
Others		946	1,422	492	1,019
Unknown		3,154	3,765		
Total		38,517	37,902	49,270	36,074
3rd Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	10,783	9,743	8,874	10,175
Paysandu	Paysandu	5,285	4,750	4,439	6,216
	Guaviyu Thermal Spas	2,386	4,264	3,479	3,043
Salto	Arapey Thermal Spas	2,487	5,611	5,694	5,076
	Dayman Thermal Spas	12,261	19,032	15,385	18,707
Soriano	Mercedes			2,956	4,247
Others		4,882	3,869	1,433	
Unknown		161	157		
Total		38,245	47,426	42,260	47,464
4th Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	18,217	16,050	13,607	14,797
Paysandu	Paysandu	6,077	6,481	8,057	5,015
	Guaviyu Thermal Spas	2,158	3,433	1,867	3,562
Salto	Arapey Thermal Spas	3,335	5,939	4,979	5,770
	Dayman Thermal Spas	10,881	16,603	17,658	19,024
Soriano	Mercedes			5,674	4,411
Others		724	6,286	2,385	256
Unknown		5,728			
Total		47,120	54,792	54,227	52,835
Sum of All Quarters					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	61,756	61,117	68,009	61,919
Paysandu	Paysandu	24,811	24,132	26,929	28,215
	Guaviyu Thermal Spas	9,327	11,599	11,995	14,270
Salto	Arapey Thermal Spas	12,196	18,923	21,093	23,191
	Dayman Thermal Spas	52,758	62,606	70,752	68,885
Soriano	Mercedes	0	0	16,272	19,054
Others		11,726	15,308	5,286	2,215
Unknown		9,043	3,973	125	0
Total		181,617	197,658	220,461	217,749

Source: Ministry of Tourism and Sports

Table A43 Uruguay Littoral Region Percentage of Visitors by Primary Destination					
1st Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	42.4%	44.1%	41.1%	36.3%
Paysandu	Paysandu	14.4%	13.1%	13.0%	15.5%
	Guaviyu Thermal Spas	4.8%	4.1%	5.8%	6.0%
Salto	Arapey Thermal Spas	3.7%	6.3%	7.7%	8.2%
	Dayman Thermal Spas	25.6%	25.9%	25.7%	23.8%
Soriano	Mercedes	0.0%	0.0%	5.3%	9.0%
Others		9.0%	6.5%	1.3%	1.2%
Unknown		0.0%	0.1%	0.2%	0.0%
Total		100.0%	100.0%	100.0%	100.0%
2nd Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	21.4%	26.3%	30.1%	20.6%
Paysandu	Paysandu	13.3%	14.1%	9.6%	12.0%
	Guaviyu Thermal Spas	5.2%	4.1%	4.7%	7.7%
Salto	Arapey Thermal Spas	11.0%	9.9%	9.4%	15.7%
	Dayman Thermal Spas	38.5%	31.9%	37.6%	32.6%
Soriano	Mercedes	0.0%	0.0%	7.5%	8.6%
Others		2.5%	3.8%	1.0%	2.8%
Unknown		8.2%	9.9%	0.0%	0.0%
Total		100.0%	100.0%	100.0%	100.0%
3rd Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	28.2%	20.5%	21.0%	21.4%
Paysandu	Paysandu	13.8%	10.0%	10.5%	13.1%
	Guaviyu Thermal Spas	6.2%	9.0%	8.2%	6.4%
Salto	Arapey Thermal Spas	6.5%	11.8%	13.5%	10.7%
	Dayman Thermal Spas	32.1%	40.1%	36.4%	39.4%
Soriano	Mercedes	0.0%	0.0%	7.0%	8.9%
Others		12.8%	8.2%	3.4%	0.0%
Unknown		0.4%	0.3%	0.0%	0.0%
Total		100.0%	100.0%	100.0%	100.0%
4th Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	38.7%	29.3%	25.1%	28.0%
Paysandu	Paysandu	12.9%	11.8%	14.9%	9.5%
	Guaviyu Thermal Spas	4.6%	6.3%	3.4%	6.7%
Salto	Arapey Thermal Spas	7.1%	10.8%	9.2%	10.9%
	Dayman Thermal Spas	23.1%	30.3%	32.6%	36.0%
Soriano	Mercedes	0.0%	0.0%	10.5%	8.3%
Others		1.5%	11.5%	4.4%	0.5%
Unknown		12.2%	0.0%	0.0%	0.0%
Total		100.0%	100.0%	100.0%	100.0%
Sum of All Quarters					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	34.0%	30.9%	30.8%	28.4%
Paysandu	Paysandu	13.7%	12.2%	12.2%	13.0%
	Guaviyu Thermal Spas	5.1%	5.9%	5.4%	6.6%
Salto	Arapey Thermal Spas	6.7%	9.6%	9.6%	10.7%
	Dayman Thermal Spas	29.0%	31.7%	32.1%	31.6%
Soriano	Mercedes	0.0%	0.0%	7.4%	8.8%
Others		6.5%	7.7%	2.4%	1.0%
Unknown		5.0%	2.0%	0.1%	0.0%
Total		100.0%	100.0%	100.0%	100.0%

Source: Ministry of Tourism and Sports

Table A44
Uruguay
Littoral Region
Visitors by Primary Destination (2002=100)

Department	Specific Destination	2002	2003	2004	2005
1st Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	100.0	103.5	125.3	120.4
Paysandu	Paysandu	100.0	90.7	116.2	151.7
	Guaviyu Thermal Spas	100.0	83.6	155.3	175.3
Salto	Arapey Thermal Spas	100.0	169.5	270.6	314.3
	Dayman Thermal Spas	100.0	100.5	129.5	131.1
Others		100.0	72.1	18.9	18.2
Total		100.0	99.7	129.4	140.9
2nd Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	100.0	120.7	179.5	90.1
Paysandu	Paysandu	100.0	104.4	92.8	84.9
	Guaviyu Thermal Spas	100.0	78.8	116.1	139.2
Salto	Arapey Thermal Spas	100.0	88.6	109.7	133.1
	Dayman Thermal Spas	100.0	81.6	125.1	79.3
Others		100.0	150.3	52.0	107.7
Total		100.0	98.4	127.9	93.7
3rd Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	100.0	90.4	82.3	94.4
Paysandu	Paysandu	100.0	89.9	84.0	117.6
	Guaviyu Thermal Spas	100.0	178.7	145.8	127.5
Salto	Arapey Thermal Spas	100.0	225.6	229.0	204.1
	Dayman Thermal Spas	100.0	155.2	125.5	152.6
Others		100.0	79.3	29.4	0.0
Total		100.0	124.0	110.5	124.1
4th Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	100.0	88.1	74.7	81.2
Paysandu	Paysandu	100.0	106.6	132.6	82.5
	Guaviyu Thermal Spas	100.0	159.1	86.5	165.1
Salto	Arapey Thermal Spas	100.0	178.1	149.3	173.0
	Dayman Thermal Spas	100.0	152.6	162.3	174.8
Others		100.0	868.2	329.4	35.4
Total		100.0	116.3	115.1	112.1
Sum of All Quarters					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	100.0	99.0	110.1	100.3
Paysandu	Paysandu	100.0	97.3	108.5	113.7
	Guaviyu Thermal Spas	100.0	124.4	128.6	153.0
Salto	Arapey Thermal Spas	100.0	155.2	173.0	190.2
	Dayman Thermal Spas	100.0	118.7	134.1	130.6
Others		100.0	130.5	45.1	18.9
Total		100.0	108.8	121.4	119.9

Source: Ministry of Tourism and Sports

Table A45
Uruguay
Littoral Region
Visitors by Primary Destination Percentage by Quarter

1st Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	39.7%	41.5%	45.2%	47.7%
Paysandu	Paysandu	33.6%	31.3%	36.0%	44.8%
	Guaviyu Thermal Spas	29.9%	20.1%	36.2%	34.3%
Salto	Arapey Thermal Spas	17.5%	19.1%	27.3%	28.9%
	Dayman Thermal Spas	28.1%	23.8%	27.1%	28.2%
Soriano	Mercedes			24.1%	38.2%
Others		44.1%	24.4%	18.5%	42.4%
Total		31.8%	29.1%	33.9%	37.4%
2nd Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	13.4%	16.3%	21.8%	12.0%
Paysandu	Paysandu	20.6%	22.1%	17.6%	15.4%
	Guaviyu Thermal Spas	21.3%	13.5%	19.3%	19.4%
Salto	Arapey Thermal Spas	34.8%	19.9%	22.1%	24.4%
	Dayman Thermal Spas	28.1%	19.3%	26.2%	17.1%
Soriano	Mercedes			22.8%	16.3%
Others		8.1%	9.3%	9.3%	46.0%
Total		21.2%	19.2%	22.3%	16.6%
3rd Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	17.5%	15.9%	13.0%	16.4%
Paysandu	Paysandu	21.3%	19.7%	16.5%	22.0%
	Guaviyu Thermal Spas	25.6%	36.8%	29.0%	21.3%
Salto	Arapey Thermal Spas	20.4%	29.7%	27.0%	21.9%
	Dayman Thermal Spas	23.2%	30.4%	21.7%	27.2%
Soriano	Mercedes			18.2%	22.3%
Others		41.6%	25.3%	27.1%	0.0%
Total		21.1%	24.0%	19.2%	21.8%
4th Quarter					
Department	Specific Destination	2002	2003	2004	2005
Rio Negro	Fray Bentos, Las Canas	29.5%	26.3%	20.0%	23.9%
Paysandu	Paysandu	24.5%	26.9%	29.9%	17.8%
	Guaviyu Thermal Spas	23.1%	29.6%	15.6%	25.0%
Salto	Arapey Thermal Spas	27.3%	31.4%	23.6%	24.9%
	Dayman Thermal Spas	20.6%	26.5%	25.0%	27.6%
Soriano	Mercedes			34.9%	23.1%
Others		6.2%	41.1%	45.1%	11.6%
Total		25.9%	27.7%	24.6%	24.3%

Source: Ministry of Tourism and Sports

Table A46
Uruguay
Littoral Region
Number of Visitors by Primary Destination
Year 2002

Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Rio Negro	Fray Bentos, Las Canas	24,506	8,250	10,783	18,217	61,756
Paysandu	Paysandu	8,332	5,117	5,285	6,077	24,811
	Guaviyu Thermal Spas	2,792	1,991	2,386	2,158	9,327
Salto	Arapey Thermal Spas	2,131	4,243	2,487	3,335	12,196
	Dayman Thermal Spas	14,800	14,816	12,261	10,881	52,758
Soriano	Mercedes	0	0	0	0	0
Others		5,174	946	4,882	724	11,726
Unknown		0	3,154	161	5,728	9,043
Total		57,735	38,517	38,245	47,120	181,617
Percentage of Visitors by Primary Destination						
Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Rio Negro	Fray Bentos, Las Canas	42.4%	21.4%	28.2%	38.7%	34.0%
Paysandu	Paysandu	14.4%	13.3%	13.8%	12.9%	13.7%
	Guaviyu Thermal Spas	4.8%	5.2%	6.2%	4.6%	5.1%
Salto	Arapey Thermal Spas	3.7%	11.0%	6.5%	7.1%	6.7%
	Dayman Thermal Spas	25.6%	38.5%	32.1%	23.1%	29.0%
Soriano	Mercedes	0.0%	0.0%	0.0%	0.0%	0.0%
Others		9.0%	2.5%	12.8%	1.5%	6.5%
Unknown		0.0%	8.2%	0.4%	12.2%	5.0%
Total		100.0%	100.0%	100.0%	100.0%	100.0%
Visitors by Primary Destination Percentage by Quarter						
Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Rio Negro	Fray Bentos, Las Canas	39.7%	13.4%	17.5%	29.5%	100.0%
Paysandu	Paysandu	33.6%	20.6%	21.3%	24.5%	100.0%
	Guaviyu Thermal Spas	29.9%	21.3%	25.6%	23.1%	100.0%
Salto	Arapey Thermal Spas	17.5%	34.8%	20.4%	27.3%	100.0%
	Dayman Thermal Spas	28.1%	28.1%	23.2%	20.6%	100.0%
Soriano	Mercedes					
Others		44.1%	8.1%	41.6%	6.2%	100.0%
Unknown		0.0%	34.9%	1.8%	63.3%	100.0%
Total		31.8%	21.2%	21.1%	25.9%	100.0%

Source: Ministry of Tourism and Sports

Table A47
Uruguay
Littoral Region
Number of Visitors by Primary Destination
Year 2003

Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Rio Negro	Fray Bentos, Las Canas	25,369	9,955	9,743	16,050	61,117
Paysandu	Paysandu	7,561	5,340	4,750	6,481	24,132
	Guaviyu Thermal Spas	2,333	1,569	4,264	3,433	11,599
Salto	Arapey Thermal Spas	3,612	3,761	5,611	5,939	18,923
	Dayman Thermal Spas	14,881	12,090	19,032	16,603	62,606
Soriano	Mercedes	0	0	0	0	0
Others		3,731	1,422	3,869	6,286	15,308
Unknown		51	3,765	157	0	3,973
Total		57,538	37,902	47,426	54,792	197,658

Percentage of Visitors by Primary Destination

Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Rio Negro	Fray Bentos, Las Canas	44.1%	26.3%	20.5%	29.3%	30.9%
Paysandu	Paysandu	13.1%	14.1%	10.0%	11.8%	12.2%
	Guaviyu Thermal Spas	4.1%	4.1%	9.0%	6.3%	5.9%
Salto	Arapey Thermal Spas	6.3%	9.9%	11.8%	10.8%	9.6%
	Dayman Thermal Spas	25.9%	31.9%	40.1%	30.3%	31.7%
Soriano	Mercedes	0.0%	0.0%	0.0%	0.0%	0.0%
Others		6.5%	3.8%	8.2%	11.5%	7.7%
Unknown		0.1%	9.9%	0.3%	0.0%	2.0%
Total		100.0%	100.0%	100.0%	100.0%	100.0%

Visitors by Primary Destination (2002=100)

Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Rio Negro	Fray Bentos, Las Canas	103.5	120.7	90.4	88.1	99.0
Paysandu	Paysandu	90.7	104.4	89.9	106.6	97.3
	Guaviyu Thermal Spas	83.6	78.8	178.7	159.1	124.4
Salto	Arapey Thermal Spas	169.5	88.6	225.6	178.1	155.2
	Dayman Thermal Spas	100.5	81.6	155.2	152.6	118.7
Soriano	Mercedes					
Others		72.1	150.3	79.3	868.2	130.5
Unknown			119.4	97.5	0.0	43.9
Total		99.7	98.4	124.0	116.3	108.8

Visitors by Primary Destination Percentage by Quarter

Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Rio Negro	Fray Bentos, Las Canas	41.5%	16.3%	15.9%	26.3%	100.0%
Paysandu	Paysandu	31.3%	22.1%	19.7%	26.9%	100.0%
	Guaviyu Thermal Spas	20.1%	13.5%	36.8%	29.6%	100.0%
Salto	Arapey Thermal Spas	19.1%	19.9%	29.7%	31.4%	100.0%
	Dayman Thermal Spas	23.8%	19.3%	30.4%	26.5%	100.0%
Soriano	Mercedes					
Others		24.4%	9.3%	25.3%	41.1%	100.0%
Unknown		1.3%	94.8%	4.0%	0.0%	100.0%
Total		29.1%	19.2%	24.0%	27.7%	100.0%

Source: Ministry of Tourism and Sports

Table A48
Uruguay
Littoral Region
Number of Visitors by Primary Destination
Year 2004

Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Rio Negro	Fray Bentos, Las Canas	30,718	14,810	8,874	13,607	68,009
Paysandu	Paysandu	9,685	4,748	4,439	8,057	26,929
	Guaviyu Thermal Spas	4,337	2,312	3,479	1,867	11,995
Salto	Arapey Thermal Spas	5,767	4,653	5,694	4,979	21,093
	Dayman Thermal Spas	19,172	18,537	15,385	17,658	70,752
Soriano	Mercedes	3,924	3,718	2,956	5,674	16,272
Others		976	492	1,433	2,385	5,286
Unknown		125				125
Total		74,704	49,270	42,260	54,227	220,461
Percentage of Visitors by Primary Destination						
Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Rio Negro	Fray Bentos, Las Canas	41.1%	30.1%	21.0%	25.1%	30.8%
Paysandu	Paysandu	13.0%	9.6%	10.5%	14.9%	12.2%
	Guaviyu Thermal Spas	5.8%	4.7%	8.2%	3.4%	5.4%
Salto	Arapey Thermal Spas	7.7%	9.4%	13.5%	9.2%	9.6%
	Dayman Thermal Spas	25.7%	37.6%	36.4%	32.6%	32.1%
Soriano	Mercedes	5.3%	7.5%	7.0%	10.5%	7.4%
Others		1.3%	1.0%	3.4%	4.4%	2.4%
Unknown		0.2%				0.1%
Total		100.0%	100.0%	100.0%	100.0%	100.0%
Visitors by Primary Destination (2002=100)						
Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Rio Negro	Fray Bentos, Las Canas	125.3	179.5	82.3	74.7	110.1
Paysandu	Paysandu	116.2	92.8	84.0	132.6	108.5
	Guaviyu Thermal Spas	155.3	116.1	145.8	86.5	128.6
Salto	Arapey Thermal Spas	270.6	109.7	229.0	149.3	173.0
	Dayman Thermal Spas	129.5	125.1	125.5	162.3	134.1
Soriano	Mercedes					
Others		18.9	52.0	29.4	329.4	45.1
Unknown						1.4
Total		129.4	127.9	110.5	115.1	121.4
Visitors by Primary Destination Percentage by Quarter						
Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Rio Negro	Fray Bentos, Las Canas	45.2%	21.8%	13.0%	20.0%	100.0%
Paysandu	Paysandu	36.0%	17.6%	16.5%	29.9%	100.0%
	Guaviyu Thermal Spas	36.2%	19.3%	29.0%	15.6%	100.0%
Salto	Arapey Thermal Spas	27.3%	22.1%	27.0%	23.6%	100.0%
	Dayman Thermal Spas	27.1%	26.2%	21.7%	25.0%	100.0%
Soriano	Mercedes	24.1%	22.8%	18.2%	34.9%	100.0%
Others		18.5%	9.3%	27.1%	45.1%	100.0%
Unknown		100.0%				100.0%
Total		33.9%	22.3%	19.2%	24.6%	100.0%

Source: Ministry of Tourism and Sports

Table A49 Uruguay Littoral Region Number of Visitors by Primary Destination Year 2005						
Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Rio Negro	Fray Bentos, Las Canas	29,517	7,430	10,175	14,797	61,919
Paysandu	Paysandu	12,640	4,344	6,216	5,015	28,215
	Guaviyu Thermal Spas	4,894	2,771	3,043	3,562	14,270
Salto	Arapey Thermal Spas	6,697	5,648	5,076	5,770	23,191
	Dayman Thermal Spas	19,403	11,751	18,707	19,024	68,885
Soriano	Mercedes	7,285	3,111	4,247	4,411	19,054
Others		940	1,019	0	256	2,215
Unknown		0	0	0	0	0
Total		81,376	36,074	47,464	52,835	217,749
Percentage of Visitors by Primary Destination						
Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Rio Negro	Fray Bentos, Las Canas	36.3%	20.6%	21.4%	28.0%	28.4%
Paysandu	Paysandu	15.5%	12.0%	13.1%	9.5%	13.0%
	Guaviyu Thermal Spas	6.0%	7.7%	6.4%	6.7%	6.6%
Salto	Arapey Thermal Spas	8.2%	15.7%	10.7%	10.9%	10.7%
	Dayman Thermal Spas	23.8%	32.6%	39.4%	36.0%	31.6%
Soriano	Mercedes	9.0%	8.6%	8.9%	8.3%	8.8%
Others		1.2%	2.8%	0.0%	0.5%	1.0%
Unknown		0.0%	0.0%	0.0%	0.0%	0.0%
Total		100.0%	100.0%	100.0%	100.0%	100.0%
Visitors by Primary Destination (2002=100)						
Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Rio Negro	Fray Bentos, Las Canas	120.4	90.1	94.4	81.2	100.3
Paysandu	Paysandu	151.7	84.9	117.6	82.5	113.7
	Guaviyu Thermal Spas	175.3	139.2	127.5	165.1	153.0
Salto	Arapey Thermal Spas	314.3	133.1	204.1	173.0	190.2
	Dayman Thermal Spas	131.1	79.3	152.6	174.8	130.6
Soriano	Mercedes					
Others		18.2	107.7	0.0	35.4	18.9
Unknown						
Total		140.9	93.7	124.1	112.1	119.9
Visitors by Primary Destination Percentage by Quarter						
Department	Specific Destination	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Rio Negro	Fray Bentos, Las Canas	47.7%	12.0%	16.4%	23.9%	100.0%
Paysandu	Paysandu	44.8%	15.4%	22.0%	17.8%	100.0%
	Guaviyu Thermal Spas	34.3%	19.4%	21.3%	25.0%	100.0%
Salto	Arapey Thermal Spas	28.9%	24.4%	21.9%	24.9%	100.0%
	Dayman Thermal Spas	28.2%	17.1%	27.2%	27.6%	100.0%
Soriano	Mercedes	38.2%	16.3%	22.3%	23.1%	100.0%
Others		42.4%	46.0%	0.0%	11.6%	100.0%
Unknown						
Total		37.4%	16.6%	21.8%	24.3%	100.0%

Source: Ministry of Tourism and Sports

Table A50
Uruguay
Visitors to Fray Bentos/Las Canas
Department/Province of Origin
January - February 2001

Dept. or Province/Date of Survey	20/21 Jan 01	3/4 Feb 01	17/18 Feb 01	25/26 Feb 01	Total
Artigas			0.2%		0.1%
Canelones	1.0%	0.8%	0.2%	1.2%	0.8%
Cerro Largo	0.5%				0.1%
Colonia	0.5%		0.2%	2.7%	0.9%
Duranzno			0.2%	0.3%	0.1%
Flores			0.7%	0.7%	0.4%
Florida	0.3%	3.0%		0.7%	1.0%
Lavalleja				1.0%	0.2%
Maldonado			0.2%	1.5%	0.4%
Montevideo	3.5%	3.8%	3.1%	7.1%	4.4%
Paysandu	4.3%	3.3%	7.7%	4.7%	5.0%
Rio Negro	5.5%	3.8%	3.9%	3.2%	4.1%
Rivera	0.3%		0.2%	0.7%	0.3%
Salto	1.8%	1.5%	0.2%	1.5%	1.2%
San Jose	0.3%		0.2%	0.5%	0.2%
Soriano	1.8%	3.3%	4.1%	7.9%	4.3%
Tacuarembo			0.2%	1.2%	0.4%
Treinta y Tres	1.0%	2.3%	1.2%	0.5%	1.2%
Total Uruguay	20.6%	21.6%	22.9%	35.5%	25.1%
Buenos Aires	59.3%	53.4%	60.2%	49.8%	55.7%
Cordoba	0.8%	0.3%			0.3%
Corrientes			0.2%		0.1%
Entre Rios	13.8%	20.8%	12.3%	11.8%	14.7%
Mendoza		1.0%		0.3%	0.3%
Nequen				0.3%	0.1%
Salta			0.2%		0.1%
Santa Fe				0.3%	0.1%
Total Argentina	73.9%	75.4%	73.0%	62.3%	71.2%
Rio de Janeiro				0.3%	0.1%
Others	5.5%	3.0%	4.1%	2.0%	3.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Lic. Ricardo Laurenz et. al, Survey of Tourists at Fray Bentos/Las Canas,
Government of Rio Negro, January/February 2001

Table A51 Uruguay Fray Bentos/Las Canas Number of International Visitors by Type of Lodging 2000 - 2005 By Quarter						
1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotels	6,141	5,119	2,145	1,982	3,241	4,047
Rented House	16,067	16,622	4,861	5,159	10,059	10,964
Camping	26,204	23,174	7,419	7,716	9,436	9,315
Own House	1,251	1,775	1,198	575	1,434	1,124
Friends and Family	2,116	2,808	1,666	1,876	1,961	1,871
Other	7,476	4,610	7,217	8,061	4,588	2,196
Total	59,255	54,108	24,506	25,369	30,718	29,517
2nd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotels	3,734	5,124	2,085	1,903	2,650	1,618
Rented House	3,418	6,803	1,700	3,563	3,691	3,869
Camping	3,930	4,766	1,536	2,484	2,550	777
Own House	749	690	523	633	428	300
Friends and Family	1,321	2,123	1,513	1,310	1,836	866
Other	216	0	894	39	3,654	0
Total	13,367	19,507	8,250	9,933	14,810	7,430
3rd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotels	3,578	4,420	1,957	2,879	2,628	3,204
Rented House	4,743	6,094	1,980	3,576	2,579	3,891
Camping	3,414	5,500	914	1,948	2,168	1,610
Own House	750	949	868	499	409	495
Friends and Family	1,156	1,384	1,521	841	1,090	975
Other	0	0	3,545	0	0	0
Total	13,641	18,347	10,783	9,743	8,874	10,175
4th Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotels	3,952	3,513	1,701	3,062	3,122	3,074
Rented House	6,737	7,326	2,856	4,266	3,990	5,981
Camping	4,417	5,354	2,944	3,432	735	1,780
Own House	1,365	744	1,217	965	1,154	748
Friends and Family	1,788	1,531	2,003	1,715	1,778	1,611
Other	2,616	1,781	7,496	2,610	2,829	1,603
Total	20,876	20,249	18,217	16,050	13,607	14,797
Sum of all Quarters						
Lodging	2000	2001	2002	2003	2004	2005
Hotels	17,406	18,176	7,888	9,827	11,641	11,943
Rented House	30,965	36,845	11,396	16,564	20,319	24,705
Camping	37,965	38,795	12,812	15,580	14,888	13,482
Own House	4,115	4,158	3,806	2,671	3,425	2,667
Friends and Family	6,380	7,846	6,703	5,743	6,665	5,323
Other	10,308	6,391	19,152	10,710	11,071	3,799
Total	107,140	112,211	61,756	61,095	68,009	61,919

Source: Consultants' estimates based on information from the Ministry of Tourism and Sports and Tourist Survey of Fray Bentos/Las Canas, January - February 2001.

Table A52 Uruguay Fray Bentos/Las Canas International Visitors by Type of Lodging 2000 - 2005 Percentage Distribution By Quarter						
1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotels	10%	9%	9%	8%	11%	14%
Rented House	27%	31%	20%	20%	33%	37%
Camping	44%	43%	30%	30%	31%	32%
Own House	2%	3%	5%	2%	5%	4%
Friends and Family	4%	5%	7%	7%	6%	6%
Other	13%	9%	29%	32%	15%	7%
Total	100%	100%	100%	100%	100%	100%
2nd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotels	28%	26%	25%	19%	18%	22%
Rented House	26%	35%	21%	36%	25%	52%
Camping	29%	24%	19%	25%	17%	10%
Own House	6%	4%	6%	6%	3%	4%
Friends and Family	10%	11%	18%	13%	12%	12%
Other	2%		11%	0%	25%	
Total	100%	100%	100%	100%	100%	100%
3rd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotels	26%	24%	18%	30%	30%	31%
Rented House	35%	33%	18%	37%	29%	38%
Camping	25%	30%	8%	20%	24%	16%
Own House	5%	5%	8%	5%	5%	5%
Friends and Family	8%	8%	14%	9%	12%	10%
Other			33%			
Total	100%	100%	100%	100%	100%	100%
4th Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotels	19%	17%	9%	19%	23%	21%
Rented House	32%	36%	16%	27%	29%	40%
Camping	21%	26%	16%	21%	5%	12%
Own House	7%	4%	7%	6%	8%	5%
Friends and Family	9%	8%	11%	11%	13%	11%
Other	13%	9%	41%	16%	21%	11%
Total	100%	100%	100%	100%	100%	100%
Sum of all Quarters						
Lodging	2000	2001	2002	2003	2004	2005
Hotels	16%	16%	13%	16%	17%	19%
Rented House	29%	33%	18%	27%	30%	40%
Camping	35%	35%	21%	26%	22%	22%
Own House	4%	4%	6%	4%	5%	4%
Friends and Family	6%	7%	11%	9%	10%	9%
Other	10%	6%	31%	18%	16%	6%
Total	100%	100%	100%	100%	100%	100%

Source: Consultants' estimates based on information from the Ministry of Tourism and Sports and Tourist Survey of Fray Bentos/Las Canas, January - February 2001.

Table A53 Government of Rio Negro Municipal Income from Las Canas Tourist Seasons 2000-2006 (UR Pesos '000s)				
Year	Camping	Motels	Other	Total
2000	2,241	1,089	195	3,525
2001	2,234	906	208	3,348
2002	603	531	138	1,272
2003	494	380	71	944
2004	943	864	139	1,946
2005	1,090	932	158	2,180
2006	416	685	104	1,206
UR Constant 2006 Pesos '000s				
Year	Camping	Motels	Other	Total
2000	3,819	1,857	332	6,008
2001	3,625	1,470	337	5,432
2002	945	832	216	1,993
2003	614	472	88	1,174
2004	1,064	976	156	2,196
2005	1,143	978	166	2,287
2006	416	685	104	1,206
Index in Constant UR Pesos 2000=100				
Year	Camping	Motels	Other	Total
2000	100.0	100.0	100.0	100.0
2001	94.9	79.2	101.5	90.4
2002	24.7	44.8	65.1	33.2
2003	16.1	25.4	26.4	19.5
2004	27.9	52.5	47.1	36.6
2005	29.9	52.7	50.1	38.1
2006	10.9	36.9	31.4	20.1
Distribution (%)				
Year	Camping	Hotels	Other	Total
2000	64%	31%	6%	100%
2001	67%	27%	6%	100%
2002	47%	42%	11%	100%
2003	52%	40%	7%	100%
2004	48%	44%	7%	100%
2005	50%	43%	7%	100%
2006	35%	57%	9%	100%

Note: The data covers only the months which make up the tourist season (January, February in the year named and December of the previous year.)

Source: Municipality of Rio Negro

Table A54 Uruguay Fray Bentos/Las Canas International Visitors by Type of Lodging (2000=100)						
1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	83.3	34.9	32.3	52.8	65.9
Rented House	100.0	103.5	30.3	32.1	62.6	68.2
Camping	100.0	88.4	28.3	29.4	36.0	35.5
Own House	100.0	141.9	95.7	46.0	114.6	89.8
Friends and Family	100.0	132.7	78.8	88.7	92.7	88.4
Others	100.0	61.7	96.5	107.8	61.4	29.4
Total	100.0	91.3	41.4	42.8	51.8	49.8
2nd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	137.3	55.8	51.0	71.0	43.3
Rented House	100.0	199.0	49.7	104.2	108.0	113.2
Camping	100.0	121.3	39.1	63.2	64.9	19.8
Own House	100.0	92.1	69.8	84.4	57.1	40.1
Friends and Family	100.0	160.7	114.6	99.2	139.0	65.6
Others	100.0		414.6	18.2	1,694.0	
Total	100.0	145.9	61.7	74.3	110.8	55.6
3rd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	123.5	54.7	80.5	73.4	89.5
Rented House	100.0	128.5	41.7	75.4	54.4	82.0
Camping	100.0	161.1	26.8	57.1	63.5	47.1
Own House	100.0	126.5	115.8	66.5	54.6	66.1
Friends and Family	100.0	119.7	131.5	72.7	94.3	84.3
Others						
Total	100.0	134.5	79.0	71.4	65.1	74.6
4th Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	88.9	43.0	77.5	79.0	77.8
Rented House	100.0	108.7	42.4	63.3	59.2	88.8
Camping	100.0	121.2	66.6	77.7	16.6	40.3
Own House	100.0	54.5	89.2	70.7	84.5	54.8
Friends and Family	100.0	85.6	112.0	95.9	99.4	90.1
Others	100.0	68.1	286.5	99.8	108.1	61.3
Total	100.0	97.0	87.3	76.9	65.2	70.9
Sum of all Quarters						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	104.4	45.3	56.5	66.9	68.6
Rented House	100.0	119.0	36.8	53.5	65.6	79.8
Camping	100.0	102.2	33.7	41.0	39.2	35.5
Own House	100.0	101.0	92.5	64.9	83.2	64.8
Friends and Family	100.0	123.0	105.0	90.0	104.5	83.4
Others	100.0	62.0	185.8	103.9	107.4	36.9
Total	100.0	104.7	57.6	57.0	63.5	57.8

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A55 Uruguay Fray Bentos/Las Canas International Visitors by Type of Lodging Percentage by Quarter						
1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	35.3%	28.2%	27.2%	20.2%	27.8%	33.9%
Rented House	51.9%	45.1%	42.7%	31.1%	49.5%	44.4%
Camping	69.0%	59.7%	57.9%	49.5%	63.4%	69.1%
Own House	30.4%	42.7%	31.5%	21.5%	41.9%	42.1%
Friends and Family	33.2%	35.8%	24.9%	32.7%	29.4%	35.1%
Others	72.5%	72.1%	37.7%	75.3%	41.4%	57.8%
Total	55.3%	48.2%	39.7%	41.5%	45.2%	47.7%
2nd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	21.5%	28.2%	26.4%	19.4%	22.8%	13.5%
Rented House	11.0%	18.5%	14.9%	21.5%	18.2%	15.7%
Camping	10.4%	12.3%	12.0%	15.9%	17.1%	5.8%
Own House	18.2%	16.6%	13.7%	23.7%	12.5%	11.3%
Friends and Family	20.7%	27.1%	22.6%	22.8%	27.5%	16.3%
Others	2.1%		4.7%	0.4%	33.0%	
Total	12.5%	17.4%	13.4%	16.3%	21.8%	12.0%
3rd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	20.6%	24.3%	24.8%	29.3%	22.6%	26.8%
Rented House	15.3%	16.5%	17.4%	21.6%	12.7%	15.7%
Camping	9.0%	14.2%	7.1%	12.5%	14.6%	11.9%
Own House	18.2%	22.8%	22.8%	18.7%	11.9%	18.6%
Friends and Family	18.1%	17.6%	22.7%	14.6%	16.4%	18.3%
Others			18.5%			
Total	12.7%	16.4%	17.5%	15.9%	13.0%	16.4%
4th Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	23%	19%	22%	31%	27%	26%
Rented House	22%	20%	25%	26%	20%	24%
Camping	12%	14%	23%	22%	5%	13%
Own House	33%	18%	32%	36%	34%	28%
Friends and Family	28%	20%	30%	30%	27%	30%
Others	25%	28%	39%	24%	26%	42%
Total	19%	18%	29%	26%	20%	24%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A56
Uruguay
Fray Bentos/Las Canas
Length of Stay in Days by Type of Lodging

1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	3.4	4.2	4.1	5.0	4.2	4.4
Rented House	6.7	6.9	5.3	6.0	6.2	5.2
Camping	5.5	5.1	4.8	6.3	5.2	7.4
Own House	6.7	5.7	12.5	7.3	9.1	13.2
Friends and Family	5.2	5.5	5.4	5.1	4.6	6.2
Others	8.6	5.6	8.3	9.2	3.8	3.5
Total	6.0	5.7	6.3	7.0	5.4	6.0
2nd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	3.8	3.6	4.6	4.0	4.2	4.0
Rented House	4.1	3.6	4.1	5.9	5.4	4.2
Camping	4.3	5.1	3.7	5.6	4.3	4.9
Own House	5.0	5.1	5.3	7.4	5.8	4.7
Friends and Family	4.7	3.6	3.4	3.8	3.7	3.9
Others	3.6	4.2	1.8	6.0	4.9	4.8
Total	4.2	4.0	3.9	5.3	4.7	4.2
3rd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	5.1	3.6	3.8	3.8	4.1	3.7
Rented House	4.2	4.9	4.9	6.2	4.8	4.6
Camping	5.3	5.6	4.7	6.6	4.3	5.0
Own House	3.8	4.7	4.6	4.6	4.5	7.2
Friends and Family	3.7	3.0	3.2	5.2	3.5	3.3
Others	3.4	2.3	7.1	5.0	7.0	3.0
Total	4.6	4.6	5.1	5.4	4.3	4.4
4th Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	3.9	3.8	3.8	3.6	3.6	3.8
Rented House	5.4	6.5	5.2	4.0	4.5	4.8
Camping	5.3	5.0	5.0	3.8	5.8	6.1
Own House	5.7	3.7	3.6	9.9	3.9	4.9
Friends and Family	3.2	4.1	3.9	3.8	4.0	3.3
Others	2.6	2.6	2.2	1.1	7.5	4.1
Total	4.6	5.0	3.6	3.7	4.9	4.5
Year						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	3.9	3.8	4.1	4.0	4.0	4.0
Rented House	5.7	5.9	5.0	5.5	5.5	4.9
Camping	5.3	5.2	4.7	5.7	4.9	6.8
Own House	5.5	5.0	6.9	7.8	6.4	8.8
Friends and Family	4.3	4.3	4.0	4.4	4.0	4.4
Others	7.0	4.8	5.4	7.2	5.1	3.8
Total	5.3	5.1	5.0	5.6	5.0	5.2

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A57
Uruguay
Fray Bentos/Las Canas
Number of Visitor - Days by Type of Lodging

1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	20,881	21,498	8,795	9,912	13,611	17,808
Rented House	107,649	114,691	25,763	30,951	62,364	57,013
Camping	144,123	118,189	35,613	48,613	49,066	68,933
Own House	8,381	10,116	14,971	4,197	13,048	14,831
Friends and Family	11,001	15,445	8,996	9,569	9,021	11,598
Others	64,294	25,816	59,900	74,157	17,434	7,687
Total	356,330	305,755	154,039	177,399	164,544	177,869
2nd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	14,187	18,448	9,590	7,614	11,132	6,471
Rented House	14,015	24,492	6,968	21,024	19,932	16,250
Camping	16,899	24,308	5,681	13,909	10,963	3,807
Own House	3,747	3,521	2,771	4,682	2,483	1,412
Friends and Family	6,207	7,641	5,144	4,979	6,794	3,376
Others	777		1,610	235	17,907	
Total	55,831	78,411	31,764	52,444	69,211	31,317
3rd Quarter						
Lodging	2,000	2,001	2,002	2,003	2,004	2,005
Hotel	18,250	15,911	7,435	10,941	10,774	11,854
Rented House	19,919	29,861	9,700	22,171	12,380	17,897
Camping	18,096	30,801	4,294	12,857	9,321	8,048
Own House	2,849	4,458	3,993	2,294	1,841	3,568
Friends and Family	4,279	4,153	4,866	4,374	3,816	3,219
Others			25,166			
Total	63,392	85,184	55,454	52,637	38,132	44,586
4th Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	15,414	13,349	6,465	11,023	11,238	11,683
Rented House	36,382	47,619	14,852	17,064	17,955	28,709
Camping	23,409	26,770	14,718	13,042	4,262	10,859
Own House	7,780	2,753	4,382	9,550	4,499	3,663
Friends and Family	5,721	6,277	7,812	6,518	7,111	5,316
Others	6,803	4,631	16,491	2,871	21,218	6,573
Total	95,509	101,399	64,719	60,067	66,283	66,802
Sum of all Quarters						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	68,732	69,206	32,284	39,490	46,755	47,816
Rented House	177,965	216,663	57,283	91,210	112,632	119,869
Camping	202,527	200,069	60,307	88,422	73,613	91,647
Own House	22,758	20,848	26,117	20,722	21,871	23,473
Friends and Family	27,208	33,516	26,819	25,440	26,741	23,509
Others	71,874	30,447	103,167	77,263	56,558	14,260
Total	571,063	570,749	305,976	342,547	338,171	320,574

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A58 Uruguay Fray Bentos/Las Canas Percentage of Visitor - Days by Type of Lodging 1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	5.9%	7.0%	5.7%	5.6%	8.3%	10.0%
Rented House	30.2%	37.5%	16.7%	17.4%	37.9%	32.1%
Camping	40.4%	38.7%	23.1%	27.4%	29.8%	38.8%
Own House	2.4%	3.3%	9.7%	2.4%	7.9%	8.3%
Friends and Family	3.1%	5.1%	5.8%	5.4%	5.5%	6.5%
Others	18.0%	8.4%	38.9%	41.8%	10.6%	4.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
2nd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	25.4%	23.5%	30.2%	14.5%	16.1%	20.7%
Rented House	25.1%	31.2%	21.9%	40.1%	28.8%	51.9%
Camping	30.3%	31.0%	17.9%	26.5%	15.8%	12.2%
Own House	6.7%	4.5%	8.7%	8.9%	3.6%	4.5%
Friends and Family	11.1%	9.7%	16.2%	9.5%	9.8%	10.8%
Others	1.4%		5.1%	0.4%	25.9%	
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
3rd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	28.8%	18.7%	13.4%	20.8%	28.3%	26.6%
Rented House	31.4%	35.1%	17.5%	42.1%	32.5%	40.1%
Camping	28.5%	36.2%	7.7%	24.4%	24.4%	18.1%
Own House	4.5%	5.2%	7.2%	4.4%	4.8%	8.0%
Friends and Family	6.8%	4.9%	8.8%	8.3%	10.0%	7.2%
Others			45.4%			
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
4th Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	16%	13%	10%	18%	17%	17%
Rented House	38%	47%	23%	28%	27%	43%
Camping	25%	26%	23%	22%	6%	16%
Own House	8%	3%	7%	16%	7%	5%
Friends and Family	6%	6%	12%	11%	11%	8%
Others	7%	5%	25%	5%	32%	10%
Total	100%	100%	100%	100%	100%	100%
Sum of all Quarters						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	12.0%	12.1%	10.6%	11.5%	13.8%	14.9%
Rented House	31.2%	38.0%	18.7%	26.6%	33.3%	37.4%
Camping	35.5%	35.1%	19.7%	25.8%	21.8%	28.6%
Own House	4.0%	3.7%	8.5%	6.0%	6.5%	7.3%
Friends and Family	4.8%	5.9%	8.8%	7.4%	7.9%	7.3%
Others	12.6%	5.3%	33.7%	22.6%	16.7%	4.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A59
Uruguay
Fray Bentos/Las Canas
Visitor - Days by Type of Lodging (2000=100)

Lodging	2000	2001	2002	2003	2004	2005
1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	103.0	42.1	47.5	65.2	85.3
Rented House	100.0	106.5	23.9	28.8	57.9	53.0
Camping	100.0	82.0	24.7	33.7	34.0	47.8
Own House	100.0	120.7	178.6	50.1	155.7	177.0
Friends and Family	100.0	140.4	81.8	87.0	82.0	105.4
Others						
Total	100.0	85.8	43.2	49.8	46.2	49.9
2nd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	130.0	67.6	53.7	78.5	45.6
Rented House	100.0	174.8	49.7	150.0	142.2	116.0
Camping	100.0	143.8	33.6	82.3	64.9	22.5
Own House	100.0	94.0	73.9	124.9	66.3	37.7
Friends and Family	100.0	123.1	82.9	80.2	109.5	54.4
Others						
Total	100.0	140.4	56.9	93.9	124.0	56.1
3rd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	87.2	40.7	60.0	59.0	65.0
Rented House	100.0	149.9	48.7	111.3	62.2	89.8
Camping	100.0	170.2	23.7	71.0	51.5	44.5
Own House	100.0	156.5	140.2	80.5	64.6	125.2
Friends and Family	100.0	97.0	113.7	102.2	89.2	75.2
Others						
Total	100.0	134.4	87.5	83.0	60.2	70.3
4th Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	86.6	41.9	71.5	72.9	75.8
Rented House	100.0	130.9	40.8	46.9	49.4	78.9
Camping	100.0	114.4	62.9	55.7	18.2	46.4
Own House	100.0	35.4	56.3	122.7	57.8	47.1
Friends and Family	100.0	109.7	136.5	113.9	124.3	92.9
Others						
Total	100.0	106.2	67.8	62.9	69.4	69.9
Sum of all Quarters						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	100.7	47.0	57.5	68.0	69.6
Rented House	100.0	121.7	32.2	51.3	63.3	67.4
Camping	100.0	98.8	29.8	43.7	36.3	45.3
Own House	100.0	91.6	114.8	91.1	96.1	103.1
Friends and Family	100.0	123.2	98.6	93.5	98.3	86.4
Others	100.0	42.4	143.5	107.5	78.7	19.8
Total	100.0	99.9	53.6	60.0	59.2	56.1

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A60 Uruguay Fray Bentos/Las Canas Visitor - Days by Type of Lodging Percentage by Quarter 1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	30.4%	31.1%	27.2%	25.1%	29.1%	37.2%
Rented House	60.5%	52.9%	45.0%	33.9%	55.4%	47.6%
Camping	71.2%	59.1%	59.1%	55.0%	66.7%	75.2%
Own House	36.8%	48.5%	57.3%	20.3%	59.7%	63.2%
Friends and Family	40.4%	46.1%	33.5%	37.6%	33.7%	49.3%
Others	89.5%	84.8%	58.1%	96.0%	30.8%	53.9%
Total	62.4%	53.6%	50.3%	51.8%	48.7%	55.5%
2nd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	20.6%	26.7%	29.7%	19.3%	23.8%	13.5%
Rented House	7.9%	11.3%	12.2%	23.1%	17.7%	13.6%
Camping	8.3%	12.2%	9.4%	15.7%	14.9%	4.2%
Own House	16.5%	16.9%	10.6%	22.6%	11.4%	6.0%
Friends and Family	22.8%	22.8%	19.2%	19.6%	25.4%	14.4%
Others	1.1%		1.6%	0.3%	31.7%	
Total	9.8%	13.7%	10.4%	15.3%	20.5%	9.8%
3rd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	26.6%	23.0%	23.0%	27.7%	23.0%	24.8%
Rented House	11.2%	13.8%	16.9%	24.3%	11.0%	14.9%
Camping	8.9%	15.4%	7.1%	14.5%	12.7%	8.8%
Own House	12.5%	21.4%	15.3%	11.1%	8.4%	15.2%
Friends and Family	15.7%	12.4%	18.1%	17.2%	14.3%	13.7%
Others			24.4%			
Total	11.1%	14.9%	18.1%	15.4%	11.3%	13.9%
4th Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	22.4%	19.3%	20.0%	27.9%	24.0%	24.4%
Rented House	20.4%	22.0%	25.9%	18.7%	15.9%	24.0%
Camping	11.6%	13.4%	24.4%	14.7%	5.8%	11.8%
Own House	34.2%	13.2%	16.8%	46.1%	20.6%	15.6%
Friends and Family	21.0%	18.7%	29.1%	25.6%	26.6%	22.6%
Others	9.5%	15.2%	16.0%	3.7%	37.5%	46.1%
Total	16.7%	17.8%	21.2%	17.5%	19.6%	20.8%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A61
Uruguay
Fray Bentos/Las Canas
Expenditure in US$ per Visitor - Day by Type of Lodging

1st Quarter

Lodging	2000	2001	2002	2003	2004	2005
Hotel	75.69	60.65	65.55	48.43	59.94	71.77
Rented House	49.61	43.74	41.71	30.88	36.33	43.22
Camping	26.44	21.76	18.70	12.45	14.33	19.85
Own House	44.09	34.13	29.46	26.07	25.76	28.24
Friends and Family	29.98	27.76	24.97	18.45	21.51	25.01
Others	39.14	34.53	31.68	22.54	29.33	34.19
Total	39.14	34.53	31.68	22.54	29.33	34.19

2nd Quarter

Lodging	2000	2001	2002	2003	2004	2005
Hotel	78.49	71.18	67.58	59.80	72.99	89.47
Rented House	27.87	40.72	31.50	16.95	38.20	21.49
Camping	30.49	25.71	19.50	15.86	15.46	17.52
Own House	30.73	47.28	26.72	30.52	26.51	31.77
Friends and Family	32.02	32.44	26.67	21.72	23.03	33.29
Others	42.38	42.72	39.45	24.58	38.32	36.79
Total	42.38	42.72	39.45	24.58	38.32	36.79

3rd Quarter

Lodging	2000	2001	2002	2003	2004	2005
Hotel	69.15	78.22	66.12	53.92	64.39	78.25
Rented House	31.79	36.78	23.16	18.84	34.46	25.94
Camping	25.70	24.67	14.07	11.79	17.48	14.41
Own House	35.11	31.48	25.66	25.02	26.86	34.05
Friends and Family	28.96	35.60	23.45	21.21	26.18	35.50
Others	40.77	39.81	32.79	24.87	37.57	39.11
Total	40.77	39.81	32.79	24.87	37.57	39.11

4th Quarter

Lodging	2000	2001	2002	2003	2004	2005
Hotel	77.98	80.09	62.70	64.36	76.41	78.47
Rented House	40.09	28.79	26.33	32.93	35.91	40.02
Camping	25.37	25.90	8.30	15.42	15.23	20.82
Own House	39.71	36.54	23.40	32.70	33.04	37.07
Friends and Family	30.26	31.83	20.36	25.26	26.94	33.23
Others	42.12	35.48	24.47	34.08	42.35	43.24
Total	42.12	35.48	24.47	34.08	42.35	43.24

Sum of all Quarters

Lodging	2000	2001	2002	2003	2004	2005
Hotel	75.04	71.25	65.71	56.59	68.03	77.41
Rented House	43.95	39.15	33.34	25.13	36.39	36.93
Camping	26.59	23.24	15.91	13.33	14.95	19.39
Own House	39.27	36.10	27.57	30.01	27.44	30.71
Friends and Family	30.35	30.56	23.68	21.31	24.01	29.49
Others	39.46	34.67	30.92	22.98	37.06	38.36
Total	40.14	36.61	31.16	25.23	34.65	37.02

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A62 Uruguay Fray Bentos/Las Canas Expenditure in US$ '000s by Type of Lodging						
1st Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	1,580	1,304	576	480	816	1,278
Rented House	5,340	5,016	1,075	956	2,266	2,464
Camping	3,811	2,571	666	605	703	1,368
Own House	370	345	441	109	336	419
Friends and Family	330	429	225	177	194	290
Others	2,516	891	1,898	1,671	511	263
Total	13,947	10,557	4,880	3,998	4,826	6,082
2nd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	1,114	1,313	648	455	812	579
Rented House	391	997	220	356	761	349
Camping	515	625	111	221	170	67
Own House	115	166	74	143	66	45
Friends and Family	199	248	137	108	156	112
Others	33	0	64	6	686	0
Total	2,366	3,350	1,253	1,289	2,652	1,152
3rd Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	1,262	1,245	492	590	694	928
Rented House	633	1,098	225	418	427	464
Camping	465	760	60	152	163	116
Own House	100	140	102	57	49	121
Friends and Family	124	148	114	93	100	114
Others	0	0	825	0	0	0
Total	2,584	3,391	1,818	1,309	1,433	1,744
4th Quarter						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	1,202	1,069	405	709	859	917
Rented House	1,459	1,371	391	562	645	1,149
Camping	594	693	122	201	65	226
Own House	309	101	103	312	149	136
Friends and Family	173	200	159	165	192	177
Others	287	164	404	98	899	284
Total	4,023	3,598	1,584	2,047	2,807	2,889
Sum of all Quarters						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	5,158	4,931	2,122	2,235	3,181	3,701
Rented House	7,822	8,483	1,910	2,292	4,099	4,427
Camping	5,385	4,650	959	1,178	1,101	1,777
Own House	894	753	720	622	600	721
Friends and Family	826	1,024	635	542	642	693
Others	2,836	1,056	3,190	1,775	2,096	547
Total	22,920	20,896	9,536	8,644	11,718	11,866

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A63 Fray Bentos/Las Canas Breakdown of Visitors' Expenditures 1st Quarter (In US$ '000s)						
Breakdown	2000	2001	2002	2003	2004	2005
Lodging	2,920	2,057	961	713	1,208	1,537
Food	5,027	3,931	1,950	1,423	1,270	1,459
Purchases	1,904	1,663	660	618	801	1,172
Others	4,096	2,906	1,310	1,244	1,547	1,915
Total	13,947	10,557	4,880	3,998	4,826	6,082
Index (2000=100)						
Lodging	100.0	70.4	32.9	24.4	41.4	52.6
Food	100.0	78.2	38.8	28.3	25.3	29.0
Purchases	100.0	87.4	34.7	32.4	42.1	61.6
Others	100.0	70.9	32.0	30.4	37.8	46.7
Total	100.0	75.7	35.0	28.7	34.6	43.6
Per Visitor (In US$)						
Lodging	49	38	39	28	39	52
Food	85	73	80	56	41	49
Purchases	32	31	27	24	26	40
Others	69	54	53	49	50	65
Total	235	195	199	158	157	206
Per Visitor per Day (In US$)						
Lodging	8.20	6.73	6.24	4.02	7.34	8.64
Food	14.11	12.86	12.66	8.02	7.72	8.20
Purchases	5.34	5.44	4.28	3.48	4.87	6.59
Others	11.50	9.50	8.50	7.01	9.40	10.76
Total	39.14	34.53	31.68	22.54	29.33	34.19
Percentage Distribution						
Lodging	20.9%	19.5%	19.7%	17.8%	25.0%	25.3%
Food	36.0%	37.2%	40.0%	35.6%	26.3%	24.0%
Purchases	13.7%	15.8%	13.5%	15.5%	16.6%	19.3%
Others	29.4%	27.5%	26.8%	31.1%	32.0%	31.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A64 Fray Bentos/Las Canas Breakdown of Visitors' Expenditures 2nd Quarter (In US$ '000s)						
Breakdown	2000	2001	2002	2003	2004	2005
Lodging	403	501	206	172	577	222
Food	837	1,244	436	437	718	282
Purchases	452	608	204	233	492	313
Others	674	997	408	447	865	335
Total	2,366	3,350	1,253	1,289	2,652	1,152
Index (2000=100)						
Lodging	100.0	124.2	51.0	42.6	143.2	55.1
Food	100.0	148.6	52.1	52.3	85.8	33.7
Purchases	100.0	134.5	45.0	51.5	108.8	69.2
Others	100.0	148.0	60.5	66.3	128.3	49.8
Total	100.0	141.6	53.0	54.5	112.1	48.7
Per Visitor (In US$)						
Lodging	30	26	25	17	39	30
Food	63	64	53	44	48	38
Purchases	34	31	25	23	33	42
Others	50	51	49	45	58	45
Total	177	172	152	130	179	155
Per Visitor per Day (In US$)						
Lodging	7.22	6.39	6.47	3.27	8.34	7.09
Food	14.99	15.86	13.73	8.34	10.38	9.01
Purchases	8.10	7.75	6.41	4.44	7.11	9.99
Others	12.07	12.72	12.84	8.52	12.49	10.70
Total	42.38	42.72	39.45	24.58	38.32	36.79
Percentage Distribution						
Lodging	17.0%	15.0%	16.4%	13.3%	21.8%	19.3%
Food	35.4%	37.1%	34.8%	33.9%	27.1%	24.5%
Purchases	19.1%	18.1%	16.2%	18.1%	18.5%	27.1%
Others	28.5%	29.8%	32.5%	34.7%	32.6%	29.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A65 Fray Bentos/Las Canas Breakdown of Visitors' Expenditures 3rd Quarter (In US$ '000s)						
Breakdown	2000	2001	2002	2003	2004	2005
Lodging	458	583	270	201	307	307
Food	908	1,160	647	405	370	440
Purchases	466	573	292	215	374	537
Others	751	1,075	610	488	382	459
Total	2,584	3,391	1,818	1,309	1,433	1,744
Index (2000=100)						
Lodging	100.0	127.1	59.0	43.9	67.0	67.0
Food	100.0	127.7	71.2	44.6	40.7	48.4
Purchases	100.0	122.8	62.6	46.2	80.2	115.3
Others	100.0	143.1	81.1	64.9	50.9	61.1
Total	100.0	131.2	70.4	50.7	55.4	67.5
Per Visitor (In US$)						
Lodging	34	32	25	21	35	30
Food	67	63	60	42	42	43
Purchases	34	31	27	22	42	53
Others	55	59	57	50	43	45
Total	189	185	169	134	161	171
Per Visitor per Day (In US$)						
Lodging	7.23	6.84	4.88	3.82	8.06	6.89
Food	14.33	13.62	11.66	7.69	9.70	9.87
Purchases	7.35	6.72	5.26	4.09	9.80	12.05
Others	11.85	12.62	10.99	9.27	10.02	10.30
Total	40.77	39.81	32.79	24.87	37.57	39.11
Percentage Distribution						
Lodging	17.7%	17.2%	14.9%	15.4%	21.4%	17.6%
Food	35.1%	34.2%	35.6%	30.9%	25.8%	25.2%
Purchases	18.0%	16.9%	16.0%	16.5%	26.1%	30.8%
Others	29.1%	31.7%	33.5%	37.3%	26.7%	26.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A66
Fray Bentos/Las Canas
Breakdown of Visitors' Expenditures
4th Quarter
(In US$ '000s)

Breakdown	2000	2001	2002	2003	2004	2005
Lodging	699	606	245	301	571	590
Food	1,448	1,304	543	644	649	736
Purchases	702	619	290	411	553	746
Others	1,174	1,070	505	691	1,035	816
Total	4,023	3,598	1,584	2,047	2,807	2,889
Index (2000=100)						
Lodging	100.0	86.7	35.1	43.0	81.6	84.4
Food	100.0	90.1	37.5	44.5	44.8	50.8
Purchases	100.0	88.1	41.3	58.6	78.8	106.1
Others	100.0	91.1	43.1	58.9	88.2	69.6
Total	100.0	89.4	39.4	50.9	69.8	71.8
Per Visitor (In US$)						
Lodging	33.5	29.9	13.5	18.7	41.9	39.9
Food	69.4	64.4	29.8	40.1	47.7	49.7
Purchases	33.6	30.5	15.9	25.6	40.7	50.4
Others	56.2	52.8	27.7	43.0	76.0	55.2
Total	192.7	177.7	86.9	127.5	206.3	195.2
Per Visitor per Day (In US$)						
Lodging	7.32	5.98	3.79	5.01	8.61	8.84
Food	15.16	12.86	8.39	10.72	9.78	11.02
Purchases	7.35	6.10	4.48	6.85	8.35	11.16
Others	12.29	10.55	7.81	11.50	15.61	12.22
Total	42.12	35.48	24.47	34.08	42.35	43.24
Percentage Distribution						
Lodging	17.4%	16.8%	15.5%	14.7%	20.3%	20.4%
Food	36.0%	36.2%	34.3%	31.5%	23.1%	25.5%
Purchases	17.5%	17.2%	18.3%	20.1%	19.7%	25.8%
Others	29.2%	29.7%	31.9%	33.8%	36.9%	28.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A66 Fray Bentos/Las Canas Breakdown of Visitors' Expenditures Sum of all Quarters (In US$ '000s)						
Breakdown	2000	2001	2002	2003	2004	2005
Lodging	4,481	3,746	1,682	1,386	2,664	2,656
Food	8,219	7,639	3,576	2,910	3,006	2,917
Purchases	3,525	3,462	1,445	1,478	2,220	2,768
Others	6,695	6,048	2,833	2,870	3,828	3,526
Total	22,920	20,896	9,536	8,644	11,718	11,866
Index (2000=100)						
Lodging	100.0	83.6	37.5	30.9	59.4	59.3
Food	100.0	92.9	43.5	35.4	36.6	35.5
Purchases	100.0	98.2	41.0	41.9	63.0	78.5
Others	100.0	90.3	42.3	42.9	57.2	52.7
Total	100.0	91.2	41.6	37.7	51.1	51.8
Per Visitor (In US$)						
Lodging	42	33	27	23	39	43
Food	77	68	58	48	44	47
Purchases	33	31	23	24	33	45
Others	62	54	46	47	56	57
Total	214	186	154	141	172	192
Per Visitor per Day (In US$)						
Lodging	7.85	6.56	5.50	4.05	7.88	8.29
Food	14.39	13.38	11.69	8.49	8.89	9.10
Purchases	6.17	6.07	4.72	4.31	6.57	8.63
Others	11.72	10.60	9.26	8.38	11.32	11.00
Total	40.14	36.61	31.16	25.23	34.65	37.02
Percentage Distribution						
Lodging	19.6%	17.9%	17.6%	16.0%	22.7%	22.4%
Food	35.9%	36.6%	37.5%	33.7%	25.7%	24.6%
Purchases	15.4%	16.6%	15.2%	17.1%	18.9%	23.3%
Others	29.2%	28.9%	29.7%	33.2%	32.7%	29.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Table A67
Department of Rio Negro
Value Added by Sector 1985 - 2003
In US$ '000,000s

Sector	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Agriculture and Cattle	31.5	36.0	55.0	55.0	53.9	48.5	44.3	53.2	51.9	73.5	91.8	86.2	70.7	70.3	61.1	70.4	63.9	58.9	73.4
Fishing																			
Mining and Quarries	0.3	0.4	0.6	0.3	0.6	0.6	0.8	0.4	0.4	0.1			0.2	0.1	0.1	0.3	0.2		
Manufacturing	1.5	1.9	2.4	2.5	2.6	3.4	3.4	3.5	3.5	3.6	4.3	4.5	4.6	4.5	3.8	3.7	3.3	2.4	2.3
Electricity, Gas and Water	12.8	15.8	14.8	15.5	4.0	18.4	22.3	20.7	19.5	16.3	14.6	12.4	14.8	20.3	20.0	15.4	24.0	17.4	15.7
Construction	0.6	0.7	1.0	1.4	1.7	1.7	2.0	2.7	3.6	4.3	4.3	4.6	4.8	5.5	5.6	5.0	4.2	2.2	1.6
Commerce, Restaurants and Hotels	6.9	8.5	10.2	13.9	14.7	19.2	19.3	23.4	29.8	35.9	36.4	37.6	39.9	39.4	36.8	33.7	30.3	18.5	16.6
Transport, Storage and Communications	3.1	4.2	4.7	5.8	6.5	8.2	8.5	10.0	11.6	13.8	15.6	17.1	26.5	26.0	25.5	24.8	33.9	25.4	25.6
Financial Institutions, Insurance	3.2	3.7	5.1	6.1	7.2	8.8	8.9	11.6	15.0	18.3	20.4	22.1	23.4	24.9	24.8	23.7	22.2	14.1	10.8
Other Services	15.3	19.7	23.7	25.4	27.1	34.3	36.4	41.5	54.1	62.8	69.9	75.3	79.6	82.9	81.8	79.2	74.6	46.9	38.0
Total	75.3	90.9	117.5	126.0	118.4	143.3	145.8	167.0	189.5	228.8	257.4	259.9	264.5	273.8	259.6	256.2	256.7	185.7	184.0
In Constant 1990 US$ '000,000s																			
Sector	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Agriculture and Cattle	46.4	46.5	61.1	59.2	57.3	48.5	38.0	38.9	33.5	43.6	48.6	45.3	36.8	37.1	33.6	39.7	37.7	46.7	65.7
Fishing																			
Mining and Quarries	0.4	0.5	0.7	0.3	0.7	0.6	0.6	0.3	0.3	0.1			0.1	0.0	0.0	0.2	0.1		
Manufacturing	2.3	2.5	2.6	2.7	2.7	3.4	2.9	2.6	2.3	2.2	2.3	2.4	2.4	2.4	2.1	2.1	2.0	1.9	2.1
Electricity, Gas and Water	18.9	20.4	16.4	16.7	4.3	18.4	19.2	15.2	12.6	9.7	7.7	6.5	7.7	10.7	11.0	8.7	14.2	13.8	14.0
Construction	0.9	0.9	1.1	1.6	1.8	1.7	1.7	2.0	2.3	2.5	2.3	2.4	2.5	2.9	3.1	2.8	2.5	1.7	1.5
Commerce, Restaurants and Hotels	10.1	11.0	11.4	15.0	15.7	19.2	16.6	17.1	19.2	21.3	19.3	19.8	20.8	20.7	20.3	19.0	17.9	14.7	14.8
Transport, Storage and Communications	4.6	5.4	5.2	6.3	6.9	8.2	7.3	7.3	7.5	8.2	8.2	9.0	13.8	13.7	14.1	14.0	20.0	20.2	22.9
Financial Institutions, Insurance	4.8	4.7	5.6	6.6	7.7	8.8	7.6	8.5	9.7	10.9	10.8	11.6	12.2	13.1	13.6	13.4	13.1	11.2	9.7
Other Services	22.5	25.4	26.4	27.3	28.9	34.3	31.3	30.3	34.8	37.2	37.0	39.6	41.5	43.7	45.0	44.7	44.1	37.2	34.1
Total	110.9	117.2	130.6	135.7	126.0	143.3	125.3	122.1	122.1	135.7	136.3	136.6	137.9	144.3	142.8	144.6	151.6	147.3	164.7
Volume Index 1990 = 100																			
Sector	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Agriculture and Cattle	95.6	95.8	126.0	121.9	118.1	100.0	78.4	80.1	68.9	89.9	100.2	93.4	75.9	76.4	69.3	81.9	77.8	96.2	135.3
Fishing																			
Mining and Quarries	67.7	84.3	105.8	48.3	106.4	100.0	100.7	40.9	40.1	13.4			13.6	5.7	5.6	24.8	20.6		
Manufacturing	67.2	73.8	77.5	79.1	81.3	100.0	85.7	76.7	66.9	64.3	68.3	70.5	70.4	71.0	62.8	62.6	58.4	55.6	61.9
Electricity, Gas and Water	102.7	110.8	89.2	90.9	23.2	100.0	104.1	82.3	68.3	52.7	42.0	35.4	41.9	58.0	59.7	47.3	76.9	74.7	76.1
Construction	51.0	50.8	64.9	89.6	101.5	100.0	100.2	114.4	133.8	146.5	132.6	140.1	145.0	167.0	177.4	162.1	144.4	99.2	83.9
Commerce, Restaurants and Hotels	52.6	57.0	59.2	78.1	81.6	100.0	86.4	89.2	99.9	111.0	100.4	102.9	108.3	108.0	105.5	99.0	93.1	76.3	77.2
Transport, Storage and Communications	56.2	65.0	63.7	76.4	84.1	100.0	88.6	88.5	90.8	99.6	100.0	109.3	168.0	166.5	170.6	169.7	242.7	244.9	278.0
Financial Institutions, Insurance	54.0	53.5	63.6	74.8	87.0	100.0	86.1	95.9	109.3	122.8	122.0	131.3	138.0	148.3	154.1	151.4	148.5	126.4	109.6
Other Services	65.7	74.0	76.9	79.7	84.2	100.0	91.4	88.5	101.7	108.6	108.0	115.6	121.1	127.4	131.4	130.5	128.6	108.6	99.4
Total	77.4	81.8	91.2	94.7	87.9	100.0	87.5	85.2	85.2	94.7	95.1	95.4	96.3	100.7	99.7	101.0	105.8	102.8	115.0
Percentage Distribution by Sector																			
Sector	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Agriculture and Cattle	41.8%	39.7%	46.8%	43.6%	45.5%	33.9%	30.4%	31.8%	27.4%	32.1%	35.7%	33.2%	26.7%	25.7%	23.6%	27.5%	24.9%	31.7%	39.9%
Fishing																			
Mining and Quarries	0.4%	0.5%	0.5%	0.2%	0.5%	0.4%	0.5%	0.2%	0.2%	0.1%			0.1%	0.0%	0.0%	0.1%	0.1%		
Manufacturing	2.0%	2.1%	2.0%	2.0%	2.2%	2.4%	2.3%	2.1%	1.8%	1.6%	1.7%	1.7%	1.7%	1.7%	1.5%	1.5%	1.3%	1.3%	1.3%
Electricity, Gas and Water	17.1%	17.4%	12.6%	12.3%	3.4%	12.9%	15.3%	12.4%	10.3%	7.1%	5.7%	4.8%	5.6%	7.4%	7.7%	6.0%	9.3%	9.3%	8.5%
Construction	0.8%	0.8%	0.9%	1.1%	1.4%	1.2%	1.4%	1.6%	1.9%	1.9%	1.7%	1.8%	1.8%	2.0%	2.2%	1.9%	1.7%	1.2%	0.9%
Commerce, Restaurants and Hotels	9.1%	9.3%	8.7%	11.1%	12.4%	13.4%	13.2%	14.0%	15.7%	15.7%	14.2%	14.5%	15.1%	14.4%	14.2%	13.2%	11.8%	10.0%	9.0%
Transport, Storage and Communications	4.2%	4.6%	4.0%	4.6%	5.5%	5.8%	5.8%	6.0%	6.1%	6.0%	6.0%	6.6%	10.0%	9.5%	9.8%	9.7%	13.2%	13.7%	13.9%
Financial Institutions, Insurance	4.3%	4.0%	4.3%	4.9%	6.1%	6.2%	6.1%	6.9%	7.9%	8.0%	7.9%	8.5%	8.9%	9.1%	9.5%	9.3%	8.7%	7.6%	5.9%
Other Services	20.3%	21.6%	20.2%	20.1%	22.9%	23.9%	25.0%	24.8%	28.5%	27.4%	27.2%	29.0%	30.1%	30.3%	31.5%	30.9%	29.1%	25.3%	20.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Uruguay, Planning and Budget Office of the President, Gross Domestic Product by Department 1985-2003, Montevideo, 2005.

Fray Bentos/Las Canas
International Visitors
Worksheet

Uruguay
Fray Bentos/Las Canas
Number of Visitors by Type of Lodging
(1st Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	6,141	5,119	2,145	1,982	3,241	4,047
Rented House	16,067	16,622	4,861	5,159	10,059	10,964
Camping	26,204	23,174	7,419	7,716	9,436	9,315
Own House	1,251	1,775	1,198	575	1,434	1,124
Friends and Family	2,116	2,808	1,666	1,876	1,961	1,871
Others	7,476	4,610	7,217	8,061	4,588	2,196
Total	59,255	54,108	24,506	25,369	30,718	29,517

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Percentage of Visitors by Type of Lodging
(1st Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	10.4%	9.5%	8.8%	7.8%	10.5%	13.7%
Rented House	27.1%	30.7%	19.8%	20.3%	32.7%	37.1%
Camping	44.2%	42.8%	30.3%	30.4%	30.7%	31.6%
Own House	2.1%	3.3%	4.9%	2.3%	4.7%	3.8%
Friends and Family	3.6%	5.2%	6.8%	7.4%	6.4%	6.3%
Others	12.6%	8.5%	29.4%	31.8%	14.9%	7.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitors by Type of Lodging (2000=100)
(1st Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	83.3	34.9	32.3	52.8	65.9
Rented House	100.0	103.5	30.3	32.1	62.6	68.2
Camping	100.0	88.4	28.3	29.4	36.0	35.5
Own House	100.0	141.9	95.7	46.0	114.6	89.8
Friends and Family	100.0	132.7	78.8	88.7	92.7	88.4
Others	100.0	61.7	96.5	107.8	61.4	29.4
Total	100.0	91.3	41.4	42.8	51.8	49.8

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitors by Type of Lodging Percentage by Quarter
(1st Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	35.3%	28.2%	27.2%	20.2%	27.8%	33.9%
Rented House	51.9%	45.1%	42.7%	31.1%	49.5%	44.4%
Camping	69.0%	59.7%	57.9%	49.5%	63.4%	69.1%
Own House	30.4%	42.7%	31.5%	21.5%	41.9%	42.1%
Friends and Family	33.2%	35.8%	24.9%	32.7%	29.4%	35.1%
Others	72.5%	72.1%	37.7%	75.3%	41.4%	57.8%
Total	55.3%	48.2%	39.7%	41.5%	45.2%	47.7%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Number of Visitors by Type of Lodging
(2nd Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	3,734	5,124	2,085	1,903	2,650	1,618
Rented House	3,418	6,803	1,700	3,563	3,691	3,869
Camping	3,930	4,766	1,536	2,484	2,550	777
Own House	749	690	523	633	428	300
Friends and Family	1,321	2,123	1,513	1,310	1,836	866
Others	216		894	39	3,654	
Total	13,367	19,507	8,250	9,933	14,810	7,430

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Percentage of Visitors by Type of Lodging
(2nd Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	27.9%	26.3%	25.3%	19.2%	17.9%	21.8%
Rented House	25.6%	34.9%	20.6%	35.9%	24.9%	52.1%
Camping	29.4%	24.4%	18.6%	25.0%	17.2%	10.5%
Own House	5.6%	3.5%	6.3%	6.4%	2.9%	4.0%
Friends and Family	9.9%	10.9%	18.3%	13.2%	12.4%	11.7%
Others	1.6%		10.8%	0.4%	24.7%	
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitors by Type of Lodging (2000=100)
(2nd Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	137.3	55.8	51.0	71.0	43.3
Rented House	100.0	199.0	49.7	104.2	108.0	113.2
Camping	100.0	121.3	39.1	63.2	64.9	19.8
Own House	100.0	92.1	69.8	84.4	57.1	40.1
Friends and Family	100.0	160.7	114.6	99.2	139.0	65.6
Others	100.0		414.6	18.2	1,694.0	
Total	100.0	145.9	61.7	74.3	110.8	55.6

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitors by Type of Lodging Percentage by Quarter
(2nd Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	21.5%	28.2%	26.4%	19.4%	22.8%	13.5%
Rented House	11.0%	18.5%	14.9%	21.5%	18.2%	15.7%
Camping	10.4%	12.3%	12.0%	15.9%	17.1%	5.8%
Own House	18.2%	16.6%	13.7%	23.7%	12.5%	11.3%
Friends and Family	20.7%	27.1%	22.6%	22.8%	27.5%	16.3%
Others	2.1%		4.7%	0.4%	33.0%	
Total	12.5%	17.4%	13.4%	16.3%	21.8%	12.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Length of Stay in Days by Type of Lodging (1st Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	3.4	4.2	4.1	5.0	4.2	4.4
Rented House	6.7	6.9	5.3	6.0	6.2	5.2
Camping	5.5	5.1	4.8	6.3	5.2	7.4
Own House	6.7	5.7	12.5	7.3	9.1	13.2
Friends and Family	5.2	5.5	5.4	5.1	4.6	6.2
Others	8.6	5.6	8.3	9.2	3.8	3.5
Total	6.0	5.7	6.3	7.0	5.4	6.0

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Number of Visitor - Days by Type of Lodging (1st Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	20,881	21,498	8,795	9,912	13,611	17,808
Rented House	107,649	114,691	25,763	30,951	62,364	57,013
Camping	144,123	118,189	35,613	48,613	49,066	68,933
Own House	8,381	10,116	14,971	4,197	13,048	14,831
Friends and Family	11,001	15,445	8,996	9,569	9,021	11,598
Others	64,294	25,816	59,900	74,157	17,434	7,687
Total	356,330	305,755	154,039	177,399	164,544	177,869

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Percentage of Visitor - Days by Type of Lodging (1st Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	5.9%	7.0%	5.7%	5.6%	8.3%	10.0%
Rented House	30.2%	37.5%	16.7%	17.4%	37.9%	32.1%
Camping	40.4%	38.7%	23.1%	27.4%	29.8%	38.8%
Own House	2.4%	3.3%	9.7%	2.4%	7.9%	8.3%
Friends and Family	3.1%	5.1%	5.8%	5.4%	5.5%	6.5%
Others	18.0%	8.4%	38.9%	41.8%	10.6%	4.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitor - Days by Type of Lodging (2000=100) (1st Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	103.0	42.1	47.5	65.2	85.3
Rented House	100.0	106.5	23.9	28.8	57.9	53.0
Camping	100.0	82.0	24.7	33.7	34.0	47.8
Own House	100.0	120.7	178.6	50.1	155.7	177.0
Friends and Family	100.0	140.4	81.8	87.0	82.0	105.4
Others						
Total	100.0	85.8	43.2	49.8	46.2	49.9

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Length of Stay in Days by Type of Lodging (2nd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	3.8	3.6	4.6	4.0	4.2	4.0
Rented House	4.1	3.6	4.1	5.9	5.4	4.2
Camping	4.3	5.1	3.7	5.6	4.3	4.9
Own House	5.0	5.1	5.3	7.4	5.8	4.7
Friends and Family	4.7	3.6	3.4	3.8	3.7	3.9
Others	3.6	4.2	1.8	6.0	4.9	4.8
Total	4.2	4.0	3.9	5.3	4.7	4.2

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Number of Visitor - Days by Type of Lodging (2nd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	14,187	18,448	9,590	7,614	11,132	6,471
Rented House	14,015	24,492	6,968	21,024	19,932	16,250
Camping	16,899	24,308	5,681	13,909	10,963	3,807
Own House	3,747	3,521	2,771	4,682	2,483	1,412
Friends and Family	6,207	7,641	5,144	4,979	6,794	3,376
Others	777		1,610	235	17,907	
Total	55,831	78,411	31,764	52,444	69,211	31,317

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Percentage of Visitor - Days by Type of Lodging (2nd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	25.4%	23.5%	30.2%	14.5%	16.1%	20.7%
Rented House	25.1%	31.2%	21.9%	40.1%	28.8%	51.9%
Camping	30.3%	31.0%	17.9%	26.5%	15.8%	12.2%
Own House	6.7%	4.5%	8.7%	8.9%	3.6%	4.5%
Friends and Family	11.1%	9.7%	16.2%	9.5%	9.8%	10.8%
Others	1.4%		5.1%	0.4%	25.9%	
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitor - Days by Type of Lodging (2000=100) (2nd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	130.0	67.6	53.7	78.5	45.6
Rented House	100.0	174.8	49.7	150.0	142.2	116.0
Camping	100.0	143.8	33.6	82.3	64.9	22.5
Own House	100.0	94.0	73.9	124.9	66.3	37.7
Friends and Family	100.0	123.1	82.9	80.2	109.5	54.4
Others						
Total	100.0	140.4	56.9	93.9	124.0	56.1

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitor - Days by Type of Lodging Percentage by Quarter (1st Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	30.4%	31.1%	27.2%	25.1%	29.1%	37.2%
Rented House	60.5%	52.9%	45.0%	33.9%	55.4%	47.6%
Camping	71.2%	59.1%	59.1%	55.0%	66.7%	75.2%
Own House	36.8%	48.5%	57.3%	20.3%	59.7%	63.2%
Friends and Family	40.4%	46.1%	33.5%	37.6%	33.7%	49.3%
Others	89.5%	84.8%	58.1%	96.0%	30.8%	53.9%
Total	62.4%	53.6%	50.3%	51.8%	48.7%	55.5%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitor - Days by Type of Lodging Percentage by Quarter (2nd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	20.6%	26.7%	29.7%	19.3%	23.8%	13.5%
Rented House	7.9%	11.3%	12.2%	23.1%	17.7%	13.6%
Camping	8.3%	12.2%	9.4%	15.7%	14.9%	4.2%
Own House	16.5%	16.9%	10.6%	22.6%	11.4%	6.0%
Friends and Family	22.8%	22.8%	19.2%	19.6%	25.4%	14.4%
Others	1.1%		1.6%	0.3%	31.7%	
Total	9.8%	13.7%	10.4%	15.3%	20.5%	9.8%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Expenditure in US$ per Visitor - Day by Type of Lodging (1st Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	75.69	60.65	65.55	48.43	59.94	71.77
Rented House	49.61	43.74	41.71	30.88	36.33	43.22
Camping	26.44	21.76	18.70	12.45	14.33	19.85
Own House	44.09	34.13	29.46	26.07	25.76	28.24
Friends and Family	29.98	27.76	24.97	18.45	21.51	25.01
Others	39.14	34.53	31.68	22.54	29.33	34.19
Total	39.14	34.53	31.68	22.54	29.33	34.19

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Expenditure in US$ per Visitor - Day by Type of Lodging (2nd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	78.49	71.18	67.58	59.80	72.99	89.47
Rented House	27.87	40.72	31.50	16.95	38.20	21.49
Camping	30.49	25.71	19.50	15.86	15.46	17.52
Own House	30.73	47.28	26.72	30.52	26.51	31.77
Friends and Family	32.02	32.44	26.67	21.72	23.03	33.29
Others	42.38	42.72	39.45	24.58	38.32	36.79
Total	42.38	42.72	39.45	24.58	38.32	36.79

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Expenditure in US$ '000s by Type of Lodging (1st Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	1,580	1,304	576	480	816	1,278
Rented House	5,340	5,016	1,075	956	2,266	2,464
Camping	3,811	2,571	666	605	703	1,368
Own House	370	345	441	109	336	419
Friends and Family	330	429	225	177	194	290
Others	2,516	891	1,898	1,671	511	263
Total	13,947	10,557	4,880	3,998	4,826	6,082

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Expenditure in US$ '000s by Type of Lodging (2nd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	1,114	1,313	648	455	812	579
Rented House	391	997	220	356	761	349
Camping	515	625	111	221	170	67
Own House	115	166	74	143	66	45
Friends and Family	199	248	137	108	156	112
Others	33		64	6	686	
Total	2,366	3,350	1,253	1,289	2,652	1,152

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Fray Bentos/Las Canas
Breakdown of Visitors' Expenditures
1st Quarter
(In US$ '000s)

Breakdown	2000	2001	2002	2003	2004	2005
Lodging	2,920	2,057	961	713	1,208	1,537
Food	5,027	3,931	1,950	1,423	1,270	1,459
Purchases	1,904	1,663	660	618	801	1,172
Others	4,096	2,906	1,310	1,244	1,547	1,915
Total	13,947	10,557	4,880	3,998	4,826	6,082
Index (2000=100)						
Lodging	100.0	70.4	32.9	24.4	41.4	52.6
Food	100.0	78.2	38.8	28.3	25.3	29.0
Purchases	100.0	87.4	34.7	32.4	42.1	61.6
Others	100.0	70.9	32.0	30.4	37.8	46.7
Total	100.0	75.7	35.0	28.7	34.6	43.6
Per Visitor (In US$)						
Lodging	49	38	39	28	39	52
Food	85	73	80	56	41	49
Purchases	32	31	27	24	26	40
Others	69	54	53	49	50	65
Total	235	195	199	158	157	206
Per Visitor per Day (In US$)						
Lodging	8.20	6.73	6.24	4.02	7.34	8.64
Food	14.11	12.86	12.66	8.02	7.72	8.20
Purchases	5.34	5.44	4.28	3.48	4.87	6.59
Others	11.50	9.50	8.50	7.01	9.40	10.76
Total	39.14	34.53	31.68	22.54	29.33	34.19
Percentage Distribution						
Lodging	20.9%	19.5%	19.7%	17.8%	25.0%	25.3%
Food	36.0%	37.2%	40.0%	35.6%	26.3%	24.0%
Purchases	13.7%	15.8%	13.5%	15.5%	16.6%	19.3%
Others	29.4%	27.5%	26.8%	31.1%	32.0%	31.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Fray Bentos/Las Canas
Breakdown of Visitors' Expenditures
2nd Quarter
(In US$ '000s)

Breakdown	2000	2001	2002	2003	2004	2005
Lodging	403	501	206	172	577	222
Food	837	1,244	436	437	718	282
Purchases	452	608	204	233	492	313
Others	674	997	408	447	865	335
Total	2,366	3,350	1,253	1,289	2,652	1,152
Index (2000=100)						
Lodging	100.0	124.2	51.0	42.6	143.2	55.1
Food	100.0	148.6	52.1	52.3	85.8	33.7
Purchases	100.0	134.5	45.0	51.5	108.8	69.2
Others	100.0	148.0	60.5	66.3	128.3	49.8
Total	100.0	141.6	53.0	54.5	112.1	48.7
Per Visitor (In US$)						
Lodging	30	26	25	17	39	30
Food	63	64	53	44	48	38
Purchases	34	31	25	23	33	42
Others	50	51	49	45	58	45
Total	177	172	152	130	179	155
Per Visitor per Day (In US$)						
Lodging	7.22	6.39	6.47	3.27	8.34	7.09
Food	14.99	15.86	13.73	8.34	10.38	9.01
Purchases	8.10	7.75	6.41	4.44	7.11	9.99
Others	12.07	12.72	12.84	8.52	12.49	10.70
Total	42.38	42.72	39.45	24.58	38.32	36.79
Percentage Distribution						
Lodging	17.0%	15.0%	16.4%	13.3%	21.8%	19.3%
Food	35.4%	37.1%	34.8%	33.9%	27.1%	24.5%
Purchases	19.1%	18.1%	16.2%	18.1%	18.5%	27.1%
Others	28.5%	29.8%	32.5%	34.7%	32.6%	29.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Number of Visitors by Type of Lodging (3rd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	3,578	4,420	1,957	2,879	2,628	3,204
Rented House	4,743	6,094	1,980	3,576	2,579	3,891
Camping	3,414	5,500	914	1,948	2,168	1,610
Own House	750	949	868	499	409	495
Friends and Family	1,156	1,384	1,521	841	1,090	975
Others			3,545			
Total	13,641	18,347	10,783	9,743	8,874	10,175

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Percentage of Visitors by Type of Lodging (3rd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	26.2%	24.1%	18.1%	29.6%	29.6%	31.5%
Rented House	34.8%	33.2%	18.4%	36.7%	29.1%	38.2%
Camping	25.0%	30.0%	8.5%	20.0%	24.4%	15.8%
Own House	5.5%	5.2%	8.1%	5.1%	4.6%	4.9%
Friends and Family	8.5%	7.5%	14.1%	8.6%	12.3%	9.6%
Others			32.9%			
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitors by Type of Lodging (2000=100) (3rd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	123.5	54.7	80.5	73.4	89.5
Rented House	100.0	128.5	41.7	75.4	54.4	82.0
Camping	100.0	161.1	26.8	57.1	63.5	47.1
Own House	100.0	126.5	115.8	66.5	54.6	66.1
Friends and Family	100.0	119.7	131.5	72.7	94.3	84.3
Others						
Total	100.0	134.5	79.0	71.4	65.1	74.6

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitors by Type of Lodging Percentage by Quarter (3rd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	20.6%	24.3%	24.8%	29.3%	22.6%	26.8%
Rented House	15.3%	16.5%	17.4%	21.6%	12.7%	15.7%
Camping	9.0%	14.2%	7.1%	12.5%	14.6%	11.9%
Own House	18.2%	22.8%	22.8%	18.7%	11.9%	18.6%
Friends and Family	18.1%	17.6%	22.7%	14.6%	16.4%	18.3%
Others			18.5%			
Total	12.7%	16.4%	17.5%	15.9%	13.0%	16.4%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Number of Visitors by Type of Lodging (4th Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	3,952	3,513	1,701	3,062	3,122	3,074
Rented House	6,737	7,326	2,856	4,266	3,990	5,981
Camping	4,417	5,354	2,944	3,432	735	1,780
Own House	1,365	744	1,217	965	1,154	748
Friends and Family	1,788	1,531	2,003	1,715	1,778	1,611
Others	2,616	1,781	7,496	2,610	2,829	1,603
Total	20,876	20,249	18,217	16,050	13,607	14,797

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Percentage of Visitors by Type of Lodging (4th Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	18.9%	17.3%	9.3%	19.1%	22.9%	20.8%
Rented House	32.3%	36.2%	15.7%	26.6%	29.3%	40.4%
Camping	21.2%	26.4%	16.2%	21.4%	5.4%	12.0%
Own House	6.5%	3.7%	6.7%	6.0%	8.5%	5.1%
Friends and Family	8.6%	7.6%	11.0%	10.7%	13.1%	10.9%
Others	12.5%	8.8%	41.1%	16.3%	20.8%	10.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitors by Type of Lodging (2000=100) (4th Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	88.9	43.0	77.5	79.0	77.8
Rented House	100.0	108.7	42.4	63.3	59.2	88.8
Camping	100.0	121.2	66.6	77.7	16.6	40.3
Own House	100.0	54.5	89.2	70.7	84.5	54.8
Friends and Family	100.0	85.6	112.0	95.9	99.4	90.1
Others	100.0	68.1	286.5	99.8	108.1	61.3
Total	100.0	97.0	87.3	76.9	65.2	70.9

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitors by Type of Lodging Percentage by Quarter (4th Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	22.7%	19.3%	21.6%	31.2%	26.8%	25.7%
Rented House	21.8%	19.9%	25.1%	25.8%	19.6%	24.2%
Camping	11.6%	13.8%	23.0%	22.0%	4.9%	13.2%
Own House	33.2%	17.9%	32.0%	36.1%	33.7%	28.0%
Friends and Family	28.0%	19.5%	29.9%	29.9%	26.7%	30.3%
Others	25.4%	27.9%	39.1%	24.4%	25.6%	42.2%
Total	19.5%	18.0%	29.5%	26.3%	20.0%	23.9%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Length of Stay in Days by Type of Lodging (3rd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	5.1	3.6	3.8	3.8	4.1	3.7
Rented House	4.2	4.9	4.9	6.2	4.8	4.6
Camping	5.3	5.6	4.7	6.6	4.3	5.0
Own House	3.8	4.7	4.6	4.6	4.5	7.2
Friends and Family	3.7	3.0	3.2	5.2	3.5	3.3
Others	3.4	2.3	7.1	5.0	7.0	3.0
Total	4.6	4.6	5.1	5.4	4.3	4.4

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Number of Visitor - Days by Type of Lodging (3rd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	18,250	15,911	7,435	10,941	10,774	11,854
Rented House	19,919	29,861	9,700	22,171	12,380	17,897
Camping	18,096	30,801	4,294	12,857	9,321	8,048
Own House	2,849	4,458	3,993	2,294	1,841	3,568
Friends and Family	4,279	4,153	4,866	4,374	3,816	3,219
Others			25,166			
Total	63,392	85,184	55,454	52,637	38,132	44,586

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Percentage of Visitor - Days by Type of Lodging (3rd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	28.8%	18.7%	13.4%	20.8%	28.3%	26.6%
Rented House	31.4%	35.1%	17.5%	42.1%	32.5%	40.1%
Camping	28.5%	36.2%	7.7%	24.4%	24.4%	18.1%
Own House	4.5%	5.2%	7.2%	4.4%	4.8%	8.0%
Friends and Family	6.8%	4.9%	8.8%	8.3%	10.0%	7.2%
Others			45.4%			
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitor - Days by Type of Lodging (2000=100) (3rd Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	87.2	40.7	60.0	59.0	65.0
Rented House	100.0	149.9	48.7	111.3	62.2	89.8
Camping	100.0	170.2	23.7	71.0	51.5	44.5
Own House	100.0	156.5	140.2	80.5	64.6	125.2
Friends and Family	100.0	97.0	113.7	102.2	89.2	75.2
Others						
Total	100.0	134.4	87.5	83.0	60.2	70.3

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Length of Stay in Days by Type of Lodging (4th Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	3.9	3.8	3.8	3.6	3.6	3.8
Rented House	5.4	6.5	5.2	4.0	4.5	4.8
Camping	5.3	5.0	5.0	3.8	5.8	6.1
Own House	5.7	3.7	3.6	9.9	3.9	4.9
Friends and Family	3.2	4.1	3.9	3.8	4.0	3.3
Others	2.6	2.6	2.2	1.1	7.5	4.1
Total	4.6	5.0	3.6	3.7	4.9	4.5

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Number of Visitor - Days by Type of Lodging (4th Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	15,414	13,349	6,465	11,023	11,238	11,683
Rented House	36,382	47,619	14,852	17,064	17,955	28,709
Camping	23,409	26,770	14,718	13,042	4,262	10,859
Own House	7,780	2,753	4,382	9,550	4,499	3,663
Friends and Family	5,721	6,277	7,812	6,518	7,111	5,316
Others	6,803	4,631	16,491	2,871	21,218	6,573
Total	95,509	101,399	64,719	60,067	66,283	66,802

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Percentage of Visitor - Days by Type of Lodging (4th Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	16.1%	13.2%	10.0%	18.4%	17.0%	17.5%
Rented House	38.1%	47.0%	22.9%	28.4%	27.1%	43.0%
Camping	24.5%	26.4%	22.7%	21.7%	6.4%	16.3%
Own House	8.1%	2.7%	6.8%	15.9%	6.8%	5.5%
Friends and Family	6.0%	6.2%	12.1%	10.9%	10.7%	8.0%
Others	7.1%	4.6%	25.5%	4.8%	32.0%	9.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitor - Days by Type of Lodging (2000=100) (4th Quarter)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	86.6	41.9	71.5	72.9	75.8
Rented House	100.0	130.9	40.8	46.9	49.4	78.9
Camping	100.0	114.4	62.9	55.7	18.2	46.4
Own House	100.0	35.4	56.3	122.7	57.8	47.1
Friends and Family	100.0	109.7	136.5	113.9	124.3	92.9
Others						
Total	100.0	106.2	67.8	62.9	69.4	69.9

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitor - Days by Type of Lodging Percentage by Quarter
(3rd Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	26.6%	23.0%	23.0%	27.7%	23.0%	24.8%
Rented House	11.2%	13.8%	16.9%	24.3%	11.0%	14.9%
Camping	8.9%	15.4%	7.1%	14.5%	12.7%	8.8%
Own House	12.5%	21.4%	15.3%	11.1%	8.4%	15.2%
Friends and Family	15.7%	12.4%	18.1%	17.2%	14.3%	13.7%
Others			24.4%			
Total	11.1%	14.9%	18.1%	15.4%	11.3%	13.9%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ per Visitor - Day by Type of Lodging
(3rd Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	69.15	78.22	66.12	53.92	64.39	78.25
Rented House	31.79	36.78	23.16	18.84	34.46	25.94
Camping	25.70	24.67	14.07	11.79	17.48	14.41
Own House	35.11	31.48	25.66	25.02	26.86	34.05
Friends and Family	28.96	35.60	23.45	21.21	26.18	35.50
Others	40.77	39.81	32.79	24.87	37.57	39.11
Total	40.77	39.81	32.79	24.87	37.57	39.11

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ '000s by Type of Lodging
(3rd Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	1,262	1,245	492	590	694	928
Rented House	633	1,098	225	418	427	464
Camping	465	760	60	152	163	116
Own House	100	140	102	57	49	121
Friends and Family	124	148	114	93	100	114
Others			825			
Total	2,584	3,391	1,818	1,309	1,433	1,744

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitor - Days by Type of Lodging Percentage by Quarter
(4th Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	22.4%	19.3%	20.0%	27.9%	24.0%	24.4%
Rented House	20.4%	22.0%	25.9%	18.7%	15.9%	24.0%
Camping	11.6%	13.4%	24.4%	14.7%	5.8%	11.8%
Own House	34.2%	13.2%	16.8%	46.1%	20.6%	15.6%
Friends and Family	21.0%	18.7%	29.1%	25.6%	26.6%	22.6%
Others	9.5%	15.2%	16.0%	3.7%	37.5%	46.1%
Total	16.7%	17.8%	21.2%	17.5%	19.6%	20.8%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ per Visitor - Day by Type of Lodging
(4th Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	77.98	80.09	62.70	64.36	76.41	78.47
Rented House	40.09	28.79	26.33	32.93	35.91	40.02
Camping	25.37	25.90	8.30	15.42	15.23	20.82
Own House	39.71	36.54	23.40	32.70	33.04	37.07
Friends and Family	30.26	31.83	20.36	25.26	26.94	33.23
Others	42.12	35.48	24.47	34.08	42.35	43.24
Total	42.12	35.48	24.47	34.08	42.35	43.24

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ '000s by Type of Lodging
(4th Quarter)

Lodging	2000	2001	2002	2003	2004	2005
Hotel	1,202	1,069	405	709	859	917
Rented House	1,459	1,371	391	562	645	1,149
Camping	594	693	122	201	65	226
Own House	309	101	103	312	149	136
Friends and Family	173	200	159	165	192	177
Others	287	164	404	98	899	284
Total	4,023	3,598	1,584	2,047	2,807	2,889

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Fray Bentos/Las Canas
Breakdown of Visitors' Expenditures
3rd Quarter
(In US$ '000s)

Breakdown	2000	2001	2002	2003	2004	2005
Lodging	458	583	270	201	307	307
Food	908	1,160	647	405	370	440
Purchases	466	573	292	215	374	537
Others	751	1,075	610	488	382	459
Total	2,584	3,391	1,818	1,309	1,433	1,744
Index (2000=100)						
Lodging	100.0	127.1	59.0	43.9	67.0	67.0
Food	100.0	127.7	71.2	44.6	40.7	48.4
Purchases	100.0	122.8	62.6	46.2	80.2	115.3
Others	100.0	143.1	81.1	64.9	50.9	61.1
Total	100.0	131.2	70.4	50.7	55.4	67.5
Per Visitor (In US$)						
Lodging	34	32	25	21	35	30
Food	67	63	60	42	42	43
Purchases	34	31	27	22	42	53
Others	55	59	57	50	43	45
Total	189	185	169	134	161	171
Per Visitor per Day (In US$)						
Lodging	7.23	6.84	4.88	3.82	8.06	6.89
Food	14.33	13.62	11.66	7.69	9.70	9.87
Purchases	7.35	6.72	5.26	4.09	9.80	12.05
Others	11.85	12.62	10.99	9.27	10.02	10.30
Total	40.77	39.81	32.79	24.87	37.57	39.11
Percentage Distribution						
Lodging	17.7%	17.2%	14.9%	15.4%	21.4%	17.6%
Food	35.1%	34.2%	35.6%	30.9%	25.8%	25.2%
Purchases	18.0%	16.9%	16.0%	16.5%	26.1%	30.8%
Others	29.1%	31.7%	33.5%	37.3%	26.7%	26.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Fray Bentos/Las Canas
Breakdown of Visitors' Expenditures
4th Quarter
(In US$ '000s)

Breakdown	2000	2001	2002	2003	2004	2005
Lodging	699	606	245	301	571	590
Food	1,448	1,304	543	644	649	736
Purchases	702	619	290	411	553	746
Others	1,174	1,070	505	691	1,035	816
Total	4,023	3,598	1,584	2,047	2,807	2,889
Index (2000=100)						
Lodging	100.0	86.7	35.1	43.0	81.6	84.4
Food	100.0	90.1	37.5	44.5	44.8	50.8
Purchases	100.0	88.1	41.3	58.6	78.8	106.1
Others	100.0	91.1	43.1	58.9	88.2	69.6
Total	100.0	89.4	39.4	50.9	69.8	71.8
Per Visitor (In US$)						
Lodging	33	30	13	19	42	40
Food	69	64	30	40	48	50
Purchases	34	31	16	26	41	50
Others	56	53	28	43	76	55
Total	193	178	87	128	206	195
Per Visitor per Day (In US$)						
Lodging	7.32	5.98	3.79	5.01	8.61	8.84
Food	15.16	12.86	8.39	10.72	9.78	11.02
Purchases	7.35	6.10	4.48	6.85	8.35	11.16
Others	12.29	10.55	7.81	11.50	15.61	12.22
Total	42.12	35.48	24.47	34.08	42.35	43.24
Percentage Distribution						
Lodging	17.4%	16.8%	15.5%	14.7%	20.3%	20.4%
Food	36.0%	36.2%	34.3%	31.5%	23.1%	25.5%
Purchases	17.5%	17.2%	18.3%	20.1%	19.7%	25.8%
Others	29.2%	29.7%	31.9%	33.8%	36.9%	28.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Number of Visitors by Type of Lodging (Sum of all Quarters)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	17,406	18,176	7,888	9,827	11,641	11,943
Rented House	30,965	36,845	11,396	16,564	20,319	24,705
Camping	37,965	38,795	12,812	15,580	14,888	13,482
Own House	4,115	4,158	3,806	2,671	3,425	2,667
Friends and Family	6,380	7,846	6,703	5,743	6,665	5,323
Others	10,308	6,391	19,152	10,710	11,071	3,799
Total	107,140	112,211	61,756	61,095	68,009	61,919

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Number of Visitors by Type of Lodging Year 2000					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2000
Hotel	6,141	3,734	3,578	3,952	17,406
Rented House	16,067	3,418	4,743	6,737	30,965
Camping	26,204	3,930	3,414	4,417	37,965
Own House	1,251	749	750	1,365	4,115
Friends and Family	2,116	1,321	1,156	1,788	6,380
Others	7,476	216		2,616	10,308
Total	59,255	13,367	13,641	20,876	107,140

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Percentage of Visitors by Type of Lodging (Sum of all Quarters)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	16.2%	16.2%	12.8%	16.1%	17.1%	19.3%
Rented House	28.9%	32.8%	18.5%	27.1%	29.9%	39.9%
Camping	35.4%	34.6%	20.7%	25.5%	21.9%	21.8%
Own House	3.8%	3.7%	6.2%	4.4%	5.0%	4.3%
Friends and Family	6.0%	7.0%	10.9%	9.4%	9.8%	8.6%
Others	9.6%	5.7%	31.0%	17.5%	16.3%	6.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Percentage of Visitors by Type of Lodging Year 2000					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2000
Hotel	10.4%	27.9%	26.2%	18.9%	16.2%
Rented House	27.1%	25.6%	34.8%	32.3%	28.9%
Camping	44.2%	29.4%	25.0%	21.2%	35.4%
Own House	2.1%	5.6%	5.5%	6.5%	3.8%
Friends and Family	3.6%	9.9%	8.5%	8.6%	6.0%
Others	12.6%	1.6%		12.5%	9.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitors by Type of Lodging (2000=100) (Sum of all Quarters)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	104.4	45.3	56.5	66.9	68.6
Rented House	100.0	119.0	36.8	53.5	65.6	79.8
Camping	100.0	102.2	33.7	41.0	39.2	35.5
Own House	100.0	101.0	92.5	64.9	83.2	64.8
Friends and Family	100.0	123.0	105.0	90.0	104.5	83.4
Others	100.0	62.0	185.8	103.9	107.4	36.9
Total	100.0	104.7	57.6	57.0	63.5	57.8

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitors by Type of Lodging (2000=100) Year 2000					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2000
Hotel	100	100	100	100	100
Rented House	100	100	100	100	100
Camping	100	100	100	100	100
Own House	100	100	100	100	100
Friends and Family	100	100	100	100	100
Others	100	100		100	100
Total	100	100	100	100	100

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitors by Type of Lodging Percentage by Quarter (Sum of all Quarters)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Rented House	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Camping	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Own House	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Friends and Family	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Others	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitors by Type of Lodging Percentage by Quarter Year 2000					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2000
Hotel	35.3%	21.5%	20.6%	22.7%	100.0%
Rented House	51.9%	11.0%	15.3%	21.8%	100.0%
Camping	69.0%	10.4%	9.0%	11.6%	100.0%
Own House	30.4%	18.2%	18.2%	33.2%	100.0%
Friends and Family	33.2%	20.7%	18.1%	28.0%	100.0%
Others	72.5%	2.1%		25.4%	100.0%
Total	55.3%	12.5%	12.7%	19.5%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Length of Stay in Days by Type of Lodging (Sum of all Quarters)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	3.9	3.8	4.1	4.0	4.0	4.0
Rented House	5.7	5.9	5.0	5.5	5.5	4.9
Camping	5.3	5.2	4.7	5.7	4.9	6.8
Own House	5.5	5.0	6.9	7.8	6.4	8.8
Friends and Family	4.3	4.3	4.0	4.4	4.0	4.4
Others	7.0	4.8	5.4	7.2	5.1	3.8
Total	5.3	5.1	5.0	5.6	5.0	5.2

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Length of Stay in Days by Type of Lodging Year 2000					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2000
Hotel	3.4	3.8	5.1	3.9	3.9
Rented House	6.7	4.1	4.2	5.4	5.7
Camping	5.5	4.3	5.3	5.3	5.3
Own House	6.7	5.0	3.8	5.7	5.5
Friends and Family	5.2	4.7	3.7	3.2	4.3
Others	8.6	3.6	3.4	2.6	7.0
Total	6.0	4.2	4.6	4.6	5.3

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Number of Visitor - Days by Type of Lodging (Sum of all Quarters)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	68,732	69,206	32,284	39,490	46,755	47,816
Rented House	177,965	216,663	57,283	91,210	112,632	119,869
Camping	202,527	200,069	60,307	88,422	73,613	91,647
Own House	22,758	20,848	26,117	20,722	21,871	23,473
Friends and Family	27,208	33,516	26,819	25,440	26,741	23,509
Others	71,874	30,447	103,167	77,263	56,558	14,260
Total	571,063	570,749	305,976	342,547	338,171	320,574

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Number of Visitor - Days by Type of Lodging Year 2000					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2000
Hotel	20,881	14,187	18,250	15,414	68,732
Rented House	107,649	14,015	19,919	36,382	177,965
Camping	144,123	16,899	18,096	23,409	202,527
Own House	8,381	3,747	2,849	7,780	22,758
Friends and Family	11,001	6,207	4,279	5,721	27,208
Others	64,294	777		6,803	71,874
Total	356,330	55,831	63,392	95,509	571,063

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Percentage of Visitor - Days by Type of Lodging (Sum of all Quarters)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	12.0%	12.1%	10.6%	11.5%	13.8%	14.9%
Rented House	31.2%	38.0%	18.7%	26.6%	33.3%	37.4%
Camping	35.5%	35.1%	19.7%	25.8%	21.8%	28.6%
Own House	4.0%	3.7%	8.5%	6.0%	6.5%	7.3%
Friends and Family	4.8%	5.9%	8.8%	7.4%	7.9%	7.3%
Others	12.6%	5.3%	33.7%	22.6%	16.7%	4.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Percentage of Visitor - Days by Type of Lodging Year 2000					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2000
Hotel	5.9%	25.4%	28.8%	16.1%	12.0%
Rented House	30.2%	25.1%	31.4%	38.1%	31.2%
Camping	40.4%	30.3%	28.5%	24.5%	35.5%
Own House	2.4%	6.7%	4.5%	8.1%	4.0%
Friends and Family	3.1%	11.1%	6.8%	6.0%	4.8%
Others	18.0%	1.4%		7.1%	12.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitor - Days by Type of Lodging (2000=100) (Sum of all Quarters)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0	100.7	47.0	57.5	68.0	69.6
Rented House	100.0	121.7	32.2	51.3	63.3	67.4
Camping	100.0	98.8	29.8	43.7	36.3	45.3
Own House	100.0	91.6	114.8	91.1	96.1	103.1
Friends and Family	100.0	123.2	98.6	93.5	98.3	86.4
Others	100.0	42.4	143.5	107.5	78.7	19.8
Total	100.0	99.9	53.6	60.0	59.2	56.1

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitor - Days by Type of Lodging (2000=100) Year 2000					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2000
Hotel	100	100	100	100	100
Rented House	100	100	100	100	100
Camping	100	100	100	100	100
Own House	100	100	100	100	100
Friends and Family	100	100	100	100	100
Others					100
Total	100	100	100	100	100

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitor - Days by Type of Lodging Percentage by Quarter (Sum of all Quarters)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Rented House	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Camping	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Own House	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Friends and Family	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Others	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Expenditure in US$ per Visitor - Day by Type of Lodging (Sum of all Quarters)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	75.04	71.25	65.71	56.59	68.03	77.41
Rented House	43.95	39.15	33.34	25.13	36.39	36.93
Camping	26.59	23.24	15.91	13.33	14.95	19.39
Own House	39.27	36.10	27.57	30.01	27.44	30.71
Friends and Family	30.35	30.56	23.68	21.31	24.01	29.49
Others	39.46	34.67	30.92	22.98	37.06	38.36
Total	40.14	36.61	31.16	25.23	34.65	37.02

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Expenditure in US$ '000s by Type of Lodging (Sum of all Quarters)						
Lodging	2000	2001	2002	2003	2004	2005
Hotel	5,158	4,931	2,122	2,235	3,181	3,701
Rented House	7,822	8,483	1,910	2,292	4,099	4,427
Camping	5,385	4,650	959	1,178	1,101	1,777
Own House	894	753	720	622	600	721
Friends and Family	826	1,024	635	542	642	693
Others	2,836	1,056	3,190	1,775	2,096	547
Total	22,920	20,896	9,536	8,644	11,718	11,866

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitor - Days by Type of Lodging Percentage by Quarter Year 2000					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2000
Hotel	30.4%	20.6%	26.6%	22.4%	100.0%
Rented House	60.5%	7.9%	11.2%	20.4%	100.0%
Camping	71.2%	8.3%	8.9%	11.6%	100.0%
Own House	36.8%	16.5%	12.5%	34.2%	100.0%
Friends and Family	40.4%	22.8%	15.7%	21.0%	100.0%
Others	89.5%	1.1%		9.5%	100.0%
Total	62.4%	9.8%	11.1%	16.7%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Expenditure in US$ per Visitor - Day by Type of Lodging Year 2000					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2000
Hotel	75.69	78.49	69.15	77.98	75.04
Rented House	49.61	27.87	31.79	40.09	43.95
Camping	26.44	30.49	25.70	25.37	26.59
Own House	44.09	30.73	35.11	39.71	39.27
Friends and Family	29.98	32.02	28.96	30.26	30.35
Others	39.14	42.38	40.77	42.12	39.46
Total	39.14	42.38	40.77	42.12	40.14

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Expenditure in US$ '000s by Type of Lodging Year 2000					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2000
Hotel	1,580	1,114	1,262	1,202	5,158
Rented House	5,340	391	633	1,459	7,822
Camping	3,811	515	465	594	5,385
Own House	370	115	100	309	894
Friends and Family	330	199	124	173	826
Others	2,516	33		287	2,836
Total	13,947	2,366	2,584	4,023	22,920

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Fray Bentos/Las Canas Breakdown of Visitors' Expenditures Sum of all Quarters (In US$ '000s)						
Breakdown	2000	2001	2002	2003	2004	2005
Lodging	4,481	3,746	1,682	1,386	2,664	2,656
Food	8,219	7,639	3,576	2,910	3,006	2,917
Purchases	3,525	3,462	1,445	1,478	2,220	2,768
Others	6,695	6,048	2,833	2,870	3,828	3,526
Total	22,920	20,896	9,536	8,644	11,718	11,866
Index (2000=100)						
Lodging	100.0	83.6	37.5	30.9	59.4	59.3
Food	100.0	92.9	43.5	35.4	36.6	35.5
Purchases	100.0	98.2	41.0	41.9	63.0	78.5
Others	100.0	90.3	42.3	42.9	57.2	52.7
Total	100.0	91.2	41.6	37.7	51.1	51.8
Per Visitor (In US$)						
Lodging	42	33	27	23	39	43
Food	77	68	58	48	44	47
Purchases	33	31	23	24	33	45
Others	62	54	46	47	56	57
Total	214	186	154	141	172	192
Per Visitor per Day (In US$)						
Lodging	7.85	6.56	5.50	4.05	7.88	8.29
Food	14.39	13.38	11.69	8.49	8.89	9.10
Purchases	6.17	6.07	4.72	4.31	6.57	8.63
Others	11.72	10.60	9.26	8.38	11.32	11.00
Total	40.14	36.61	31.16	25.23	34.65	37.02
Percentage Distribution						
Lodging	19.6%	17.9%	17.6%	16.0%	22.7%	22.4%
Food	35.9%	36.6%	37.5%	33.7%	25.7%	24.6%
Purchases	15.4%	16.6%	15.2%	17.1%	18.9%	23.3%
Others	29.2%	28.9%	29.7%	33.2%	32.7%	29.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Year 2000 (In US$ '000s)					
Breakdown	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Year
Lodging	2,920	403	458	699	4,481
Food	5,027	837	908	1,448	8,219
Purchases	1,904	452	466	702	3,525
Others	4,096	674	751	1,174	6,695
Total	13,947	2,366	2,584	4,023	22,920
Quarterly Distribution (%)					
Lodging	65.2%	9.0%	10.2%	15.6%	100.0%
Food	61.2%	10.2%	11.0%	17.6%	100.0%
Purchases	54.0%	12.8%	13.2%	19.9%	100.0%
Others	61.2%	10.1%	11.2%	17.5%	100.0%
Total	60.8%	10.3%	11.3%	17.6%	100.0%
Per Visitor (In US$)					
Lodging	49	30	34	33	42
Food	85	63	67	69	77
Purchases	32	34	34	34	33
Others	69	50	55	56	62
Total	235	177	189	193	214
Per Visitor per Day (In US$)					
Lodging	8.20	7.22	7.23	7.32	7.85
Food	14.11	14.99	14.33	15.16	14.39
Purchases	5.34	8.10	7.35	7.35	6.17
Others	11.50	12.07	11.85	12.29	11.72
Total	39.14	42.38	40.77	42.12	40.14
Percentage Distribution					
Lodging	20.9%	17.0%	17.7%	17.4%	19.6%
Food	36.0%	35.4%	35.1%	36.0%	35.9%
Purchases	13.7%	19.1%	18.0%	17.5%	15.4%
Others	29.4%	28.5%	29.1%	29.2%	29.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Number of Visitors by Type of Lodging
Year 2001

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2001
Hotel	5,119	5,124	4,420	3,513	18,176
Rented House	16,622	6,803	6,094	7,326	36,845
Camping	23,174	4,766	5,500	5,354	38,795
Own House	1,775	690	949	744	4,158
Friends and Family	2,808	2,123	1,384	1,531	7,846
Others	4,610			1,781	6,391
Total	54,108	19,507	18,347	20,249	112,211

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Percentage of Visitors by Type of Lodging
Year 2001

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2001
Hotel	9.5%	26.3%	24.1%	17.3%	16.2%
Rented House	30.7%	34.9%	33.2%	36.2%	32.8%
Camping	42.8%	24.4%	30.0%	26.4%	34.6%
Own House	3.3%	3.5%	5.2%	3.7%	3.7%
Friends and Family	5.2%	10.9%	7.5%	7.6%	7.0%
Others	8.5%			8.8%	5.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitors by Type of Lodging (2000=100)
Year 2001

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2001
Hotel	83	137	124	89	104
Rented House	103	199	128	109	119
Camping	88	121	161	121	102
Own House	142	92	127	55	101
Friends and Family	133	161	120	86	123
Others	62			68	62
Total	91	146	134	97	105

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitors by Type of Lodging Percentage by Quarter
Year 2001

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2001
Hotel	28.2%	28.2%	24.3%	19.3%	100.0%
Rented House	45.1%	18.5%	16.5%	19.9%	100.0%
Camping	59.7%	12.3%	14.2%	13.8%	100.0%
Own House	42.7%	16.6%	22.8%	17.9%	100.0%
Friends and Family	35.8%	27.1%	17.6%	19.5%	100.0%
Others	72.1%			27.9%	100.0%
Total	48.2%	17.4%	16.4%	18.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Number of Visitors by Type of Lodging
Year 2002

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Hotel	2,145	2,085	1,957	1,701	7,888
Rented House	4,861	1,700	1,980	2,856	11,396
Camping	7,419	1,536	914	2,944	12,812
Own House	1,198	523	868	1,217	3,806
Friends and Family	1,666	1,513	1,521	2,003	6,703
Others	7,217	894	3,545	7,496	19,152
Total	24,506	8,250	10,783	18,217	61,756

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Percentage of Visitors by Type of Lodging
Year 2002

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Hotel	8.8%	25.3%	18.1%	9.3%	12.8%
Rented House	19.8%	20.6%	18.4%	15.7%	18.5%
Camping	30.3%	18.6%	8.5%	16.2%	20.7%
Own House	4.9%	6.3%	8.1%	6.7%	6.2%
Friends and Family	6.8%	18.3%	14.1%	11.0%	10.9%
Others	29.4%	10.8%	32.9%	41.1%	31.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitors by Type of Lodging (2000=100)
Year 2002

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Hotel	35	56	55	43	45
Rented House	30	50	42	42	37
Camping	28	39	27	67	34
Own House	96	70	116	89	92
Friends and Family	79	115	131	112	105
Others	97	415		286	186
Total	41	62	79	87	58

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitors by Type of Lodging Percentage by Quarter
Year 2002

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Hotel	27.2%	26.4%	24.8%	21.6%	100.0%
Rented House	42.7%	14.9%	17.4%	25.1%	100.0%
Camping	57.9%	12.0%	7.1%	23.0%	100.0%
Own House	31.5%	13.7%	22.8%	32.0%	100.0%
Friends and Family	24.9%	22.6%	22.7%	29.9%	100.0%
Others	37.7%	4.7%	18.5%	39.1%	100.0%
Total	39.7%	13.4%	17.5%	29.5%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Length of Stay in Days by Type of Lodging
Year 2001

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2001
Hotel	4.2	3.6	3.6	3.8	3.8
Rented House	6.9	3.6	4.9	6.5	5.9
Camping	5.1	5.1	5.6	5.0	5.2
Own House	5.7	5.1	4.7	3.7	5.0
Friends and Family	5.5	3.6	3.0	4.1	4.3
Others	5.6	4.2	2.3	2.6	4.8
Total	5.7	4.0	4.6	5.0	5.1

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Number of Visitor - Days by Type of Lodging
Year 2001

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2001
Hotel	21,498	18,448	15,911	13,349	69,206
Rented House	114,691	24,492	29,861	47,619	216,663
Camping	118,189	24,308	30,801	26,770	200,069
Own House	10,116	3,521	4,458	2,753	20,848
Friends and Family	15,445	7,641	4,153	6,277	33,516
Others	25,816			4,631	30,447
Total	305,755	78,411	85,184	101,399	570,749

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Percentage of Visitor - Days by Type of Lodging
Year 2001

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2001
Hotel	7.0%	23.5%	18.7%	13.2%	12.1%
Rented House	37.5%	31.2%	35.1%	47.0%	38.0%
Camping	38.7%	31.0%	36.2%	26.4%	35.1%
Own House	3.3%	4.5%	5.2%	2.7%	3.7%
Friends and Family	5.1%	9.7%	4.9%	6.2%	5.9%
Others	8.4%			4.6%	5.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitor - Days by Type of Lodging (2000=100)
Year 2001

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2001
Hotel	103	130	87	87	101
Rented House	107	175	150	131	122
Camping	82	144	170	114	99
Own House	121	94	156	35	92
Friends and Family	140	123	97	110	123
Others					42
Total	86	140	134	106	100

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Length of Stay in Days by Type of Lodging
Year 2002

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Hotel	4.1	4.6	3.8	3.8	4.1
Rented House	5.3	4.1	4.9	5.2	5.0
Camping	4.8	3.7	4.7	5.0	4.7
Own House	12.5	5.3	4.6	3.6	6.9
Friends and Family	5.4	3.4	3.2	3.9	4.0
Others	8.3	1.8	7.1	2.2	5.4
Total	6.3	3.9	5.1	3.6	5.0

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Number of Visitor - Days by Type of Lodging
Year 2002

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Hotel	8,795	9,590	7,435	6,465	32,284
Rented House	25,763	6,968	9,700	14,852	57,283
Camping	35,613	5,681	4,294	14,718	60,307
Own House	14,971	2,771	3,993	4,382	26,117
Friends and Family	8,996	5,144	4,866	7,812	26,819
Others	59,900	1,610	25,166	16,491	103,167
Total	154,039	31,764	55,454	64,719	305,976

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Percentage of Visitor - Days by Type of Lodging
Year 2002

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Hotel	5.7%	30.2%	13.4%	10.0%	10.6%
Rented House	16.7%	21.9%	17.5%	22.9%	18.7%
Camping	23.1%	17.9%	7.7%	22.7%	19.7%
Own House	9.7%	8.7%	7.2%	6.8%	8.5%
Friends and Family	5.8%	16.2%	8.8%	12.1%	8.8%
Others	38.9%	5.1%	45.4%	25.5%	33.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitor - Days by Type of Lodging (2000=100)
Year 2002

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Hotel	42	68	41	42	47
Rented House	24	50	49	41	32
Camping	25	34	24	63	30
Own House	179	74	140	56	115
Friends and Family	82	83	114	137	99
Others					144
Total	43	57	87	68	54

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitor - Days by Type of Lodging Percentage by Quarter
Year 2001

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2001
Hotel	31.1%	26.7%	23.0%	19.3%	100.0%
Rented House	52.9%	11.3%	13.8%	22.0%	100.0%
Camping	59.1%	12.2%	15.4%	13.4%	100.0%
Own House	48.5%	16.9%	21.4%	13.2%	100.0%
Friends and Family	46.1%	22.8%	12.4%	18.7%	100.0%
Others	84.8%			15.2%	100.0%
Total	53.6%	13.7%	14.9%	17.8%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ per Visitor - Day by Type of Lodging
Year 2001

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2001
Hotel	60.65	71.18	78.22	80.09	71.25
Rented House	43.74	40.72	36.78	28.79	39.15
Camping	21.76	25.71	24.67	25.90	23.24
Own House	34.13	47.28	31.48	36.54	36.10
Friends and Family	27.76	32.44	35.60	31.83	30.56
Others	34.53	42.72	39.81	35.48	34.67
Total	34.53	42.72	39.81	35.48	36.61

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ '000s by Type of Lodging
Year 2001

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2001
Hotel	1,303.88	1,313.19	1,244.58	1,069.11	4,930.76
Rented House	5,016.39	997.28	1,098.25	1,370.78	8,482.70
Camping	2,571.34	625.03	759.84	693.45	4,649.66
Own House	345.26	166.50	140.33	100.59	752.69
Friends and Family	428.68	247.89	147.82	199.77	1,024.16
Others	891.42			164.31	1,055.73
Total	10,556.96	3,349.90	3,390.82	3,598.02	20,895.70

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitor - Days by Type of Lodging Percentage by Quarter
Year 2002

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Hotel	27.2%	29.7%	23.0%	20.0%	100.0%
Rented House	45.0%	12.2%	16.9%	25.9%	100.0%
Camping	59.1%	9.4%	7.1%	24.4%	100.0%
Own House	57.3%	10.6%	15.3%	16.8%	100.0%
Friends and Family	33.5%	19.2%	18.1%	29.1%	100.0%
Others	58.1%	1.6%	24.4%	16.0%	100.0%
Total	50.3%	10.4%	18.1%	21.2%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ per Visitor - Day by Type of Lodging
Year 2002

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Hotel	65.55	67.58	66.12	62.70	65.71
Rented House	41.71	31.50	23.16	26.33	33.34
Camping	18.70	19.50	14.07	8.30	15.91
Own House	29.46	26.72	25.66	23.40	27.57
Friends and Family	24.97	26.67	23.45	20.36	23.68
Others	31.68	39.45	32.79	24.47	30.92
Total	31.68	39.45	32.79	24.47	31.16

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ '000s by Type of Lodging
Year 2002

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2002
Hotel	576	648	492	405	2,122
Rented House	1,075	220	225	391	1,910
Camping	666	111	60	122	959
Own House	441	74	102	103	720
Friends and Family	225	137	114	159	635
Others	1,898	64	825	404	3,190
Total	4,880	1,253	1,818	1,584	9,536

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Year 2001 (In US$ '000s)					
Breakdown	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Year
Lodging	2,057	501	583	606	3,746
Food	3,931	1,244	1,160	1,304	7,639
Purchases	1,663	608	573	619	3,462
Others	2,906	997	1,075	1,070	6,048
Total	10,557	3,350	3,391	3,598	20,896
Quarterly Distribution (%)					
Lodging	54.9%	13.4%	15.6%	16.2%	100.0%
Food	51.5%	16.3%	15.2%	17.1%	100.0%
Purchases	48.0%	17.6%	16.5%	17.9%	100.0%
Others	48.0%	16.5%	17.8%	17.7%	100.0%
Total	50.5%	16.0%	16.2%	17.2%	100.0%
Per Visitor (In US$)					
Lodging	38	26	32	30	33
Food	73	64	63	64	68
Purchases	31	31	31	31	31
Others	54	51	59	53	54
Total	195	172	185	178	186
Per Visitor per Day (In US$)					
Lodging	6.73	6.39	6.84	5.98	6.56
Food	12.86	15.86	13.62	12.86	13.38
Purchases	5.44	7.75	6.72	6.10	6.07
Others	9.50	12.72	12.62	10.55	10.60
Total	34.53	42.72	39.81	35.48	36.61
Percentage Distribution					
Lodging	19.5%	15.0%	17.2%	16.8%	17.9%
Food	37.2%	37.1%	34.2%	36.2%	36.6%
Purchases	15.8%	18.1%	16.9%	17.2%	16.6%
Others	27.5%	29.8%	31.7%	29.7%	28.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Year 2002 (In US$ '000s)					
Breakdown	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Year
Lodging	961	206	270	245	1,682
Food	1,950	436	647	543	3,576
Purchases	660	204	292	290	1,445
Others	1,310	408	610	505	2,833
Total	4,880	1,253	1,818	1,584	9,536
Quarterly Distribution (%)					
Lodging	57.1%	12.2%	16.1%	14.6%	100.0%
Food	54.5%	12.2%	18.1%	15.2%	100.0%
Purchases	45.7%	14.1%	20.2%	20.1%	100.0%
Others	46.2%	14.4%	21.5%	17.8%	100.0%
Total	51.2%	13.1%	19.1%	16.6%	100.0%
Per Visitor (In US$)					
Lodging	39	25	25	13	27
Food	80	53	60	30	58
Purchases	27	25	27	16	23
Others	53	49	57	28	46
Total	199	152	169	87	154
Per Visitor per Day (In US$)					
Lodging	6.24	6.47	4.88	3.79	5.50
Food	12.66	13.73	11.66	8.39	11.69
Purchases	4.28	6.41	5.26	4.48	4.72
Others	8.50	12.84	10.99	7.81	9.26
Total	31.68	39.45	32.79	24.47	31.16
Percentage Distribution					
Lodging	19.7%	16.4%	14.9%	15.5%	17.6%
Food	40.0%	34.8%	35.6%	34.3%	37.5%
Purchases	13.5%	16.2%	16.0%	18.3%	15.2%
Others	26.8%	32.5%	33.5%	31.9%	29.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Number of Visitors by Type of Lodging Year 2003					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Hotel	1,982	1,903	2,879	3,062	9,827
Rented House	5,159	3,563	3,576	4,266	16,564
Camping	7,716	2,484	1,948	3,432	15,580
Own House	575	633	499	965	2,671
Friends and Family	1,876	1,310	841	1,715	5,743
Others	8,061	39		2,610	10,710
Total	25,369	9,933	9,743	16,050	61,095

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Number of Visitors by Type of Lodging Year 2004					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Hotel	3,241	2,650	2,628	3,122	11,641
Rented House	10,059	3,691	2,579	3,990	20,319
Camping	9,436	2,550	2,168	735	14,888
Own House	1,434	428	409	1,154	3,425
Friends and Family	1,961	1,836	1,090	1,778	6,665
Others	4,588	3,654		2,829	11,071
Total	30,718	14,810	8,874	13,607	68,009

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Percentage of Visitors by Type of Lodging Year 2003					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Hotel	7.8%	19.2%	29.6%	19.1%	16.1%
Rented House	20.3%	35.9%	36.7%	26.6%	27.1%
Camping	30.4%	25.0%	20.0%	21.4%	25.5%
Own House	2.3%	6.4%	5.1%	6.0%	4.4%
Friends and Family	7.4%	13.2%	8.6%	10.7%	9.4%
Others	31.8%	0.4%		16.3%	17.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Percentage of Visitors by Type of Lodging Year 2004					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Hotel	10.5%	17.9%	29.6%	22.9%	17.1%
Rented House	32.7%	24.9%	29.1%	29.3%	29.9%
Camping	30.7%	17.2%	24.4%	5.4%	21.9%
Own House	4.7%	2.9%	4.6%	8.5%	5.0%
Friends and Family	6.4%	12.4%	12.3%	13.1%	9.8%
Others	14.9%	24.7%		20.8%	16.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitors by Type of Lodging (2000=100) Year 2003					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Hotel	32	51	80	77	56
Rented House	32	104	75	63	53
Camping	29	63	57	78	41
Own House	46	84	67	71	65
Friends and Family	89	99	73	96	90
Others	108	18		100	104
Total	43	74	71	77	57

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitors by Type of Lodging (2000=100) Year 2004					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Hotel	53	71	73	79	67
Rented House	63	108	54	59	66
Camping	36	65	63	17	39
Own House	115	57	55	85	83
Friends and Family	93	139	94	99	104
Others	61	1,694		108	107
Total	52	111	65	65	63

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitors by Type of Lodging Percentage by Quarter Year 2003					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Hotel	20.2%	19.4%	29.3%	31.2%	100.0%
Rented House	31.1%	21.5%	21.6%	25.8%	100.0%
Camping	49.5%	15.9%	12.5%	22.0%	100.0%
Own House	21.5%	23.7%	18.7%	36.1%	100.0%
Friends and Family	32.7%	22.8%	14.6%	29.9%	100.0%
Others	75.3%	0.4%		24.4%	100.0%
Total	41.5%	16.3%	15.9%	26.3%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitors by Type of Lodging Percentage by Quarter Year 2004					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Hotel	27.8%	22.8%	22.6%	26.8%	100.0%
Rented House	49.5%	18.2%	12.7%	19.6%	100.0%
Camping	63.4%	17.1%	14.6%	4.9%	100.0%
Own House	41.9%	12.5%	11.9%	33.7%	100.0%
Friends and Family	29.4%	27.5%	16.4%	26.7%	100.0%
Others	41.4%	33.0%		25.6%	100.0%
Total	45.2%	21.8%	13.0%	20.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Length of Stay in Days by Type of Lodging
Year 2003

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Hotel	5.0	4.0	3.8	3.6	4.0
Rented House	6.0	5.9	6.2	4.0	5.5
Camping	6.3	5.6	6.6	3.8	5.7
Own House	7.3	7.4	4.6	9.9	7.8
Friends and Family	5.1	3.8	5.2	3.8	4.4
Others	9.2	6.0	5.0	1.1	7.2
Total	7.0	5.3	5.4	3.7	5.6

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Number of Visitor - Days by Type of Lodging
Year 2003

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Hotel	9,912	7,614	10,941	11,023	39,490
Rented House	30,951	21,024	22,171	17,064	91,210
Camping	48,613	13,909	12,857	13,042	88,422
Own House	4,197	4,682	2,294	9,550	20,722
Friends and Family	9,569	4,979	4,374	6,518	25,440
Others	74,157	235		2,871	77,263
Total	177,399	52,444	52,637	60,067	342,547

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Percentage of Visitor - Days by Type of Lodging
Year 2003

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Hotel	5.6%	14.5%	20.8%	18.4%	11.5%
Rented House	17.4%	40.1%	42.1%	28.4%	26.6%
Camping	27.4%	26.5%	24.4%	21.7%	25.8%
Own House	2.4%	8.9%	4.4%	15.9%	6.0%
Friends and Family	5.4%	9.5%	8.3%	10.9%	7.4%
Others	41.8%	0.4%		4.8%	22.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitor - Days by Type of Lodging (2000=100)
Year 2003

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Hotel	47	54	60	72	57
Rented House	29	150	111	47	51
Camping	34	82	71	56	44
Own House	50	125	81	123	91
Friends and Family	87	80	102	114	94
Others					107
Total	50	94	83	63	60

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Length of Stay in Days by Type of Lodging
Year 2004

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Hotel	4.2	4.2	4.1	3.6	4.0
Rented House	6.2	5.4	4.8	4.5	5.5
Camping	5.2	4.3	4.3	5.8	4.9
Own House	9.1	5.8	4.5	3.9	6.4
Friends and Family	4.6	3.7	3.5	4.0	4.0
Others	3.8	4.9	7.0	7.5	5.1
Total	5.4	4.7	4.3	4.9	5.0

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Number of Visitor - Days by Type of Lodging
Year 2004

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Hotel	13,611	11,132	10,774	11,238	46,755
Rented House	62,364	19,932	12,380	17,955	112,632
Camping	49,066	10,963	9,321	4,262	73,613
Own House	13,048	2,483	1,841	4,499	21,871
Friends and Family	9,021	6,794	3,816	7,111	26,741
Others	17,434	17,907		21,218	56,558
Total	164,544	69,211	38,132	66,283	338,171

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Percentage of Visitor - Days by Type of Lodging
Year 2004

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Hotel	8.3%	16.1%	28.3%	17.0%	13.8%
Rented House	37.9%	28.8%	32.5%	27.1%	33.3%
Camping	29.8%	15.8%	24.4%	6.4%	21.8%
Own House	7.9%	3.6%	4.8%	6.8%	6.5%
Friends and Family	5.5%	9.8%	10.0%	10.7%	7.9%
Others	10.6%	25.9%		32.0%	16.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitor - Days by Type of Lodging (2000=100)
Year 2004

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Hotel	65	78	59	73	68
Rented House	58	142	62	49	63
Camping	34	65	52	18	36
Own House	156	66	65	58	96
Friends and Family	82	109	89	124	98
Others					79
Total	46	124	60	69	59

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitor - Days by Type of Lodging Percentage by Quarter
Year 2003

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Hotel	25.1%	19.3%	27.7%	27.9%	100.0%
Rented House	33.9%	23.1%	24.3%	18.7%	100.0%
Camping	55.0%	15.7%	14.5%	14.7%	100.0%
Own House	20.3%	22.6%	11.1%	46.1%	100.0%
Friends and Family	37.6%	19.6%	17.2%	25.6%	100.0%
Others	96.0%	0.3%		3.7%	100.0%
Total	51.8%	15.3%	15.4%	17.5%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ per Visitor - Day by Type of Lodging
Year 2003

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Hotel	48.43	59.80	53.92	64.36	56.59
Rented House	30.88	16.95	18.84	32.93	25.13
Camping	12.45	15.86	11.79	15.42	13.33
Own House	26.07	30.52	25.02	32.70	30.01
Friends and Family	18.45	21.72	21.21	25.26	21.31
Others	22.54	24.58	24.87	34.08	22.98
Total	22.54	24.58	24.87	34.08	25.23

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ '000s by Type of Lodging
Year 2003

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2003
Hotel	480.01	455.35	589.93	709.40	2,234.68
Rented House	955.79	356.39	417.60	561.91	2,291.68
Camping	605.08	220.60	151.63	201.05	1,178.36
Own House	109.40	142.90	57.39	312.25	621.93
Friends and Family	176.54	108.14	92.76	164.65	542.08
Others	1,671.49	5.78		97.86	1,775.13
Total	3,998.30	1,289.15	1,309.30	2,047.11	8,643.86

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitor - Days by Type of Lodging Percentage by Quarter
Year 2004

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Hotel	29.1%	23.8%	23.0%	24.0%	100.0%
Rented House	55.4%	17.7%	11.0%	15.9%	100.0%
Camping	66.7%	14.9%	12.7%	5.8%	100.0%
Own House	59.7%	11.4%	8.4%	20.6%	100.0%
Friends and Family	33.7%	25.4%	14.3%	26.6%	100.0%
Others	30.8%	31.7%		37.5%	100.0%
Total	48.7%	20.5%	11.3%	19.6%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ per Visitor - Day by Type of Lodging
Year 2004

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Hotel	59.94	72.99	64.39	76.41	68.03
Rented House	36.33	38.20	34.46	35.91	36.39
Camping	14.33	15.46	17.48	15.23	14.95
Own House	25.76	26.51	26.86	33.04	27.44
Friends and Family	21.51	23.03	26.18	26.94	24.01
Others	29.33	38.32	37.57	42.35	37.06
Total	29.33	38.32	37.57	42.35	34.65

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ '000s by Type of Lodging
Year 2004

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2004
Hotel	816	812	694	859	3,181
Rented House	2,266	761	427	645	4,099
Camping	703	170	163	65	1,101
Own House	336	66	49	149	600
Friends and Family	194	156	100	192	642
Others	511	686		899	2,096
Total	4,826	2,652	1,433	2,807	11,718

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Year 2003 (In US$ '000s)					
Breakdown	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Year
Lodging	713	172	201	301	1,386
Food	1,423	437	405	644	2,910
Purchases	618	233	215	411	1,478
Others	1,244	447	488	691	2,870
Total	3,998	1,289	1,309	2,047	8,644
Quarterly Distribution (%)					
Lodging	51.4%	12.4%	14.5%	21.7%	100.0%
Food	48.9%	15.0%	13.9%	22.1%	100.0%
Purchases	41.8%	15.8%	14.6%	27.8%	100.0%
Others	43.4%	15.6%	17.0%	24.1%	100.0%
Total	46.3%	14.9%	15.1%	23.7%	100.0%
Per Visitor (In US$)					
Lodging	28	17	21	19	23
Food	56	44	42	40	48
Purchases	24	23	22	26	24
Others	49	45	50	43	47
Total	158	130	134	128	141
Per Visitor per Day (In US$)					
Lodging	4.02	3.27	3.82	5.01	4.05
Food	8.02	8.34	7.69	10.72	8.49
Purchases	3.48	4.44	4.09	6.85	4.31
Others	7.01	8.52	9.27	11.50	8.38
Total	22.54	24.58	24.87	34.08	25.23
Percentage Distribution					
Lodging	17.8%	13.3%	15.4%	14.7%	16.0%
Food	35.6%	33.9%	30.9%	31.5%	33.7%
Purchases	15.5%	18.1%	16.5%	20.1%	17.1%
Others	31.1%	34.7%	37.3%	33.8%	33.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Year 2004 (In US$ '000s)					
Breakdown	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Year
Lodging	1,208	577	307	571	2,664
Food	1,270	718	370	649	3,006
Purchases	801	492	374	553	2,220
Others	1,547	865	382	1,035	3,828
Total	4,826	2,652	1,433	2,807	11,718
Quarterly Distribution (%)					
Lodging	45.4%	21.7%	11.5%	21.4%	100.0%
Food	42.2%	23.9%	12.3%	21.6%	100.0%
Purchases	36.1%	22.2%	16.8%	24.9%	100.0%
Others	40.4%	22.6%	10.0%	27.0%	100.0%
Total	41.2%	22.6%	12.2%	24.0%	100.0%
Per Visitor (In US$)					
Lodging	39	39	35	42	39
Food	41	48	42	48	44
Purchases	26	33	42	41	33
Others	50	58	43	76	56
Total	157	179	161	206	172
Per Visitor per Day (In US$)					
Lodging	7.34	8.34	8.06	8.61	7.88
Food	7.72	10.38	9.70	9.78	8.89
Purchases	4.87	7.11	9.80	8.35	6.57
Others	9.40	12.49	10.02	15.61	11.32
Total	29.33	38.32	37.57	42.35	34.65
Percentage Distribution					
Lodging	25.0%	21.8%	21.4%	20.3%	22.7%
Food	26.3%	27.1%	25.8%	23.1%	25.7%
Purchases	16.6%	18.5%	26.1%	19.7%	18.9%
Others	32.0%	32.6%	26.7%	36.9%	32.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Number of Visitors by Type of Lodging
Year 2005

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Hotel	4,047	1,618	3,204	3,074	11,943
Rented House	10,964	3,869	3,891	5,981	24,705
Camping	9,315	777	1,610	1,780	13,482
Own House	1,124	300	495	748	2,667
Friends and Family	1,871	866	975	1,611	5,323
Others	2,196			1,603	3,799
Total	29,517	7,430	10,175	14,797	61,919

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Percentage of Visitors by Type of Lodging
Year 2005

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Hotel	13.7%	21.8%	31.5%	20.8%	19.3%
Rented House	37.1%	52.1%	38.2%	40.4%	39.9%
Camping	31.6%	10.5%	15.8%	12.0%	21.8%
Own House	3.8%	4.0%	4.9%	5.1%	4.3%
Friends and Family	6.3%	11.7%	9.6%	10.9%	8.6%
Others	7.4%			10.8%	6.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitors by Type of Lodging (2000=100)
Year 2005

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Hotel	66	43	90	78	69
Rented House	68	113	82	89	80
Camping	36	20	47	40	36
Own House	90	40	66	55	65
Friends and Family	88	66	84	90	83
Others	29			61	37
Total	50	56	75	71	58

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitors by Type of Lodging Percentage by Quarter
Year 2005

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Hotel	33.9%	13.5%	26.8%	25.7%	100.0%
Rented House	44.4%	15.7%	15.7%	24.2%	100.0%
Camping	69.1%	5.8%	11.9%	13.2%	100.0%
Own House	42.1%	11.3%	18.6%	28.0%	100.0%
Friends and Family	35.1%	16.3%	18.3%	30.3%	100.0%
Others	57.8%			42.2%	100.0%
Total	47.7%	12.0%	16.4%	23.9%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Length of Stay in Days by Type of Lodging Year 2005					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Hotel	4.4	4.0	3.7	3.8	4.0
Rented House	5.2	4.2	4.6	4.8	4.9
Camping	7.4	4.9	5.0	6.1	6.8
Own House	13.2	4.7	7.2	4.9	8.8
Friends and Family	6.2	3.9	3.3	3.3	4.4
Others	3.5	4.8	3.0	4.1	3.8
Total	6.0	4.2	4.4	4.5	5.2

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Number of Visitor - Days by Type of Lodging Year 2005					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Hotel	17,808	6,471	11,854	11,683	47,816
Rented House	57,013	16,250	17,897	28,709	119,869
Camping	68,933	3,807	8,048	10,859	91,647
Own House	14,831	1,412	3,568	3,663	23,473
Friends and Family	11,598	3,376	3,219	5,316	23,509
Others	7,687			6,573	14,260
Total	177,869	31,317	44,586	66,802	320,574

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Percentage of Visitor - Days by Type of Lodging Year 2005					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Hotel	10.0%	20.7%	26.6%	17.5%	14.9%
Rented House	32.1%	51.9%	40.1%	43.0%	37.4%
Camping	38.8%	12.2%	18.1%	16.3%	28.6%
Own House	8.3%	4.5%	8.0%	5.5%	7.3%
Friends and Family	6.5%	10.8%	7.2%	8.0%	7.3%
Others	4.3%			9.8%	4.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Visitor - Days by Type of Lodging (2000=100) Year 2005					
Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Hotel	85	46	65	76	70
Rented House	53	116	90	79	67
Camping	48	23	44	46	45
Own House	177	38	125	47	103
Friends and Family	105	54	75	93	86
Others					20
Total	50	56	70	70	56

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Visitor - Days by Type of Lodging Percentage by Quarter
Year 2005

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Hotel	37.2%	13.5%	24.8%	24.4%	100.0%
Rented House	47.6%	13.6%	14.9%	24.0%	100.0%
Camping	75.2%	4.2%	8.8%	11.8%	100.0%
Own House	63.2%	6.0%	15.2%	15.6%	100.0%
Friends and Family	49.3%	14.4%	13.7%	22.6%	100.0%
Others	53.9%			46.1%	100.0%
Total	55.5%	9.8%	13.9%	20.8%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ per Visitor - Day by Type of Lodging
Year 2005

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Hotel	71.77	89.47	78.25	78.47	77.41
Rented House	43.22	21.49	25.94	40.02	36.93
Camping	19.85	17.52	14.41	20.82	19.39
Own House	28.24	31.77	34.05	37.07	30.71
Friends and Family	25.01	33.29	35.50	33.23	29.49
Others	34.19	36.79	39.11	43.24	38.36
Total	34.19	36.79	39.11	43.24	37.02

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay
Fray Bentos/Las Canas
Expenditure in US$ '000s by Type of Lodging
Year 2005

Lodging	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	2005
Hotel	1,278	579	928	917	3,701
Rented House	2,464	349	464	1,149	4,427
Camping	1,368	67	116	226	1,777
Own House	419	45	121	136	721
Friends and Family	290	112	114	177	693
Others	263			284	547
Total	6,082	1,152	1,744	2,889	11,866

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

Uruguay Fray Bentos/Las Canas Year 2005 (In US$ '000s)					
Breakdown	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Year
Lodging	1,537	222	307	590	2,656
Food	1,459	282	440	736	2,917
Purchases	1,172	313	537	746	2,768
Others	1,915	335	459	816	3,526
Total	6,082	1,152	1,744	2,889	11,866
Quarterly Distribution (%)					
Lodging	57.9%	8.4%	11.6%	22.2%	100.0%
Food	50.0%	9.7%	15.1%	25.2%	100.0%
Purchases	42.4%	11.3%	19.4%	26.9%	100.0%
Others	54.3%	9.5%	13.0%	23.2%	100.0%
Total	51.3%	9.7%	14.7%	24.3%	100.0%
Per Visitor (In US$)					
Lodging	52	30	30	40	43
Food	49	38	43	50	47
Purchases	40	42	53	50	45
Others	65	45	45	55	57
Total	206	155	171	195	192
Per Visitor per Day (In US$)					
Lodging	8.64	7.09	6.89	8.84	8.29
Food	8.20	9.01	9.87	11.02	9.10
Purchases	6.59	9.99	12.05	11.16	8.63
Others	10.76	10.70	10.30	12.22	11.00
Total	34.19	36.79	39.11	43.24	37.02
Percentage Distribution					
Lodging	25.3%	19.3%	17.6%	20.4%	22.4%
Food	24.0%	24.5%	25.2%	25.5%	24.6%
Purchases	19.3%	27.1%	30.8%	25.8%	23.3%
Others	31.5%	29.1%	26.3%	28.3%	29.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Consultants' estimates based on data from the Ministry of Tourism and Sports

ANNEX III

Economic Impact Assessment, November 2005

INTERNATIONAL FINANCE CORPORATION (IFC)

DRAFT REPORT

Economic Impacts Assessment

Cumulative Impact Study
For Two Pulp Mills and Wood Sources
In Uruguay

November, 2005

Submitted by

PCI Americas

In association with

MALCOLM PIRNIE

Montevideo Washington, D.C. Sao Paulo

Annex E : Economic Impacts

9.1 Introduction

This socio-economic report for the Cumulative Impact Study (SER/CIS) covers the two pulp mills[1] proposed to be established in the vicinity of Fray Bentos, Uruguay on the left bank of the Uruguay River. The economic impacts relate to the level of gross national and departmental products, the effect on the balance of trade and on the fiscal position of the central and local governments. The social impact relates to national and departmental employment. Other social impacts are not found in this report but rather are located in other sections of the CIS, related to the discussion of the possible cumulative environmental impacts of the proposed projects.

The SER/CIS report is based on documentation received from the International Finance Corporation (IFC) and from the owners of the proposed Celulosas de M'Bopicuá (CMB) and ORION pulp mills, Empresa Nacional de Celulosas Españolas (ENCE) and Metsa ORION, respectively, who commissioned the individual studies of the socio-economic impact of the mills. The data provided has been verified, to the extent possible, by consulting official publications of the Government of Uruguay (GOU) and other relevant documents and through interviews in Uruguay, with government and industry officials.

9.2 Principal Findings

Different methodologies, prices and time periods were used by the consultants engaged by ORION and CMB to examine the impacts of the pulp mills.[2] The resulting cumulative impacts include some adjustments to reconcile these approaches. As can be observed in the Table 1 the cumulative impacts on the national and regional economy and on employment would be considerable.

[1] Referred to in this report also as the "plants", "mills" or the "projects".
[2] HCG Environment Consultants and Tea, Deloitte, Touche, respectively.

TABLE 1

PRINCIPAL FINDINGS

CUMULATIVE ECONOMIC AND EMPLOYMENT IMPACT

FOR THE ORION AND CMB PULP MILLS

IMPACT	REGION	UNIT	CONSTRUCTION PHASE (2005-2007)	OPERATIONAL PHASE (TYPICAL YEAR)
Economic	Uruguay	USD Millions	417 (3.2% of 2004 GDP)	331 (2.5% of 2004 GDP)
Economic	Rio Negro	USD Millions	206 (112% of 2003 GDP)	223 (121% of 2003 GDP)
Economic	Soriano	USD Millions	33 (14% of 2003 GDP)	13 (6% of 2003 GDP)
Economic	Paysandú	USD Millions	41 (13% of 2003 GDP)	23 (7% of 2003 GDP)
Employment	Uruguay	Person-Years	18,699 (1.4% of 2004 Total)	12,593 (0.9% of 2004 Total)
Employment	Rio Negro	Person-Years	11,196 (109% of labor force)	4,773 (47% of labor force)
Employment	Soriano	Person-Years	1,337 (6% of labor force)	1,108 (5% of labor force)
Employment	Paysandú	Person-Years	2,421 (8% of labor force)	2,048 (7% of labor force)
Balance of Trade	Uruguay	USD Millions	- 1,100 (Similar to "normal" annual average)	+244 (Approx. 22% of "normal" trade deficit)
Government Revenues	Uruguay	USD Millions	+83 (2% of 2004 revenues)	+39 (1% of 2004 revenues)
Government Revenues	Rio Negro	USD Millions	-1.8 (19% of 2004revenues)	+0.9 (10% of 2004 revenues)

The economic impact will be equivalent to about 3.2% of 2004 GDP over the three years of the construction phase and about 2.5% of 2004 GDP in each year of full capacity production. The impact on Gross National Product (GNP) is estimated to be 2.8% for the entire three year construction period and 1.5% for the years in which the plants are operating at full capacity.

The Department of Rio Negro will receive the lion's share of the impacts, equivalent to more than the entire gross departmental product in 2003 for construction phase and for each year of full capacity production during the operational phase. The economic impacts will still be significant, though less, for the neighboring departments of Soriano and Paysandú.

The employment impacts will also be significant, accounting for an increase in the equivalent of 1.3% of the 2004 national labor force over the three years of the construction phase and equivalent to slightly less than 1% of the 2004 national labor force during each year of full capacity production.

As for the economic impacts, Rio Negro would receive the largest employment impact, being equivalent to about 143% of its 2004 labor force over the construction period and 47% of the labor force during each year of full capacity production. However, current residents Rio Negro would not be able to take full advantage of much of this expected job creation, as unemployment is currently reported at less than 600 persons. But it can be expected that persons of working age not in the labor force will enter the labor force and the prospects of increased employment in the department will encourage migration from other parts of the country and day commuters from neighboring departments.

The employment impact on Soriano and Paysandú, while not as large as that for Rio Negro, will be important as both of those Department do have a significant amount of unemployment.

During the construction phase there will be a negative effect on the trade balance, approximately equivalent to the annual deficit registered during the "normal" years prior to the onset of the "River Plate Crisis", at which time imports fell drastically. During the years of full capacity production of the pulp mills the positive trade flow generated by sales of pulp, less negative trade flows of reduced overseas log sales and imported inputs for the pulp mills, will offset about 22% of the "normal" trade deficit.

Central Government revenues should total the equivalent of about 2% of 2004 revenues for the construction phase and for each year of full capacity production of the pulp mills should contribute slightly less than the equivalent of 1% of 2004 revenues.

Incremental expenditures incurred to support the pulp mills by the departmental government of Rio Negro total about USD 1.8 million, equivalent to about 19% of 2004 revenues. When the pulp mills are at full production it is estimated that about USD 916,000 will be collected as additional revenue, equivalent to about 10% of 2004 revenues.

Key reference documents cited in this report are:

- HCG Environment Consultants (HCG), Socio-Economic Study of the Impacts of the ORION Pulp Mill Project, Helsinki, Spanish version May 2004, English translation June 2004.
- Tea, Deloitte, Touche (TDT), Economic Impact Study of the M'Bopicuá Pulp Mill (CMB), Montevideo, November 2003.
- Tea, Deloitte, Touche (TDT), Update of the Economic Impact Study of the M'Bopicuá Pulp Mill (CMB), Montevideo, January 2005.

- CMB, Feasibility Study, M'Bopicuá Pulp Mill Project, 2004.
- United Nations, Handbook of Input-Output Table Compilation and Analysis, New York, 1999.

9.3 Methodology

Different methodologies were used to evaluate the economic and employment impacts of the pulp mills. These approaches are described in the following paragraphs.

The HCG methodology[3] is based on an input-output (IO) model, which identifies the flows of goods and services among the various sectors of the economy. The IO model appears well constructed and the results are "user friendly". The IO model shows the direct and indirect effects of increases in activity in one sector on all other sectors of the economy and is thus an ideal tool for determining the impacts on the economy of construction activity and subsequent production of the proposed mills.

[3] Described in HCG June 2004, pp. 129-131.

In 1983 the Central Bank of Uruguay (BCU) constructed a 55 sector input-output table providing a detailed relationship of inter-sectoral flows. This has since been updated using the RAS method[4]. The updates for 1998 and 2000 were used in the studies of the impacts of the individual plants. The 2000 revision contained 16 sectors. On the basis of the 2000 IO table HCG constructed a six sector model for the analysis of pulp mill investments; the sectors being: forestry, manufacturing, energy, construction, transports and a residual comprising all other sectors. For the analysis of the production phase of the pulp mill HCG added a seventh sector – pulp production[5]. These input-output relationships facilitated the estimation of indirect and induced impacts on the different sectors of the economy resulting from the proposed investment. Econometric techniques were used by HCG in order to relate output and employment at the national level.[6]

HCG considered that the updated model was adequate to represent present and future inter-sector relationships and therefore provide indications of the levels of impact from the establishment and operation of the pulp mill.

The IO model treats the economic relationships within the economy in order to arrive at the economic impacts. To translate these impacts into employment, HCG employed econometric relationships, relating output and employment for the various sectors. Some specific discussion on the appropriateness of using of the error correction econometric model, rather than other models, would have been useful to provide an indication of the reliability of the relationships found. HCG comments on the limitations of the input data and the subsequent need to establish common values for some of the parameters, rather than individual values for each sector. It was also noticed from the evidence of the results provided in the IO Model worksheets that there is a somewhat tenuous relationship between output and employment, suggesting that the data available to HCG, and/or this particular econometric model, might be far from perfect as an indicator of likely employment. More discussion on the validity of the econometric technique and of the interpretation of the results might strengthen confidence in the robustness of the results.

[4] For methods used to update original tables see United Nations (1999)
[5] See Uruguay, Banco Central, Cuentas Nacionales, 1991 for an explanation of the methodology used in developing the Uruguayan input-output tables.
[6] See HCG June 2004 footnote P. 130.

On the other hand, TDT, having decided that the input-output models available for the Uruguayan economy were inappropriate, opted for an "eclectic approach"[7] that relied more on interviews, official surveys and national accounts and employment information, with recourse to the 1998 input-output table in situations where this was necessary to forward the analysis. The calculations made by TDT, unlike those of HCG, which were in the form of a comprehensive internally consistent model, were essentially ad hoc.

There are difficulties in accurately combining the results of the HCG and TDT consultants for several reasons.

1. HCG and TDT use different definitions of impacts.
2. HCG use estimated 2004 base year price levels in USD and TDT use estimated 2003 price levels in USD.
3. HCG works with basic prices, as per national accounting methodology, and TDT works with market prices.
4. Whereas HCG examines the relationships for every sector of the economy, TDT is selective in its coverage.

In order to be useful as a guide of the cumulative economic and employment impacts, the results of the SER/CIS should be in common terminology and should provide the same coverage. Given the nature of the information available in the two SE studies, it was decided to present the results, using the HCG model as a guideline and standardizing the definitions of direct, indirect and induced impacts. The prices are those reported by TDT (USD of 2003) and HCG (USD of 2004)[8], that is they have been kept at their values given in the original SE studies. It was decided to adopt the HCG framework in order to calculate the cumulative impacts, as the results would incorporate more of the likely impacts, though possibly erring in their magnitude. Where doubts occur on the likely validity of the magnitude of impacts, this has been indicated.

[7] Described in TDT November 2003, pp.8-17.
[8] While national account information and many inputs and outputs are in Uruguayan pesos, USD prices are used for all calculations in the reports. National account exchange rates are given in the HCG IO Model. No exchange rates are provided in the reports. The November 2003 TDT report was updated in December 2004/January 2005 and prices were kept in 2003 USD.

9.4 Definition Of Impacts – Construction Phase

As HCG and TDT used different definitions of direct, indirect and induced impacts, in order to provide an aggregation for the two plants it was necessary to rearrange the impacts to fit into a common definition. The definitions adopted were:

Direct impacts – activities of the construction sector in building the pulp mills and carrying out all related work.

Indirect Impacts – activities of all other sectors directly related to building the plants and carrying out all related work and providing services to the mills and its employees.

Induced impacts – activities induced by increases in consumption and investment as a result of the construction of the plants.

This revised classification of the impacts is summarized in Table 1:

TABLE 2

CLASSIFICATION OF IMPACTS – CONSTRUCTION PHASE

ACCEPTED DEFINITION	HCG DEFINITION	TDT DEFINITION
Direct	Direct – Construction Sector	Indirect – Construction Sector
Indirect	Direct – Other Sectors	Indirect – Other Activities
Induced	Indirect	Induced

9.5 Economic Impact Construction Phase

For purposes of calculating the economic impacts reference investment values of USD933 millions[9] and USD 471 millions[10] for the ORION and CMB plants respectively have been used.

9 Botnia Input-Output Model inputs and HCG June 2004 p. 8 and table 61 p. 114.

10 TDT Nov. 03 p. 19.

Site preparation for the ORION plant began in 2005. Work on a Free Trade Zone (FTZ) adjacent to the site of the CMB plant also began in 2005. The periods of the construction of the plants may not be exactly similar; but it is assumed that construction will take place over the period 2005-2007.

The timing and the annual percentage of construction expected to be completed each year are shown in Table 3.

TABLE 3

ANNUAL CONSTRUCTION COSTS FOR PULP MILLS

(IN USD MILLIONS)

	ORION (USD)	CMB (USD)	TOTAL (USD)	ORION (%)	CMB (%)
2005 (Year 1)	202	99	301	22%	21%
2006 (Year 2)	699	166	865	75%	35%
2007 (Year 3)	32	207	239	3%	44%
Total	933	471	1,405	100.0	100%

Sources: HCG IO Tables inputs and HCG June 2004 p. 114; TDT Nov. 03 p. 19.

Note: Totals in this table and in others in this report may not add up exactly due to rounding.

Different construction patterns can be discerned for the two plants: Peak construction activity of the ORION plant will occur in the second year, while for the CMB plant peak construction activity will occur in the last year of the period.

The direct impacts as reported by HCG and TDT are examined in Table 4. There are some differences between the proportion of construction activity by year as reported in Table 3 and the time allocation of the direct impacts as reported in Table 3. But in general the patterns remain similar, with the greater portion of the direct impacts from the construction of the ORION plant occurring in year 2 and that for the CMB plant occurring in year 3.

TABLE 4

PULP MILLS DIRECT ECONOMIC IMPACT – CONSTRUCTION PHASE

(IN USD MILLIONS AND PERCENTAGES)

	ORION (USDm)	CMB (USDm)	TOTAL (USDm)	ORION (%)	CMB (%)
Year 1	30	11	41	34	30
Year 2	48	11	59	56	31
Year 3	8	14	22	10	39
Total	86	36	122	100	100

Sources: HCG IO Tables and TDT Nov. 03 p. 59,

The distribution by sector of the indirect impacts for the construction phase are shown in Table 5, which provides some indication of the difficulties of applying an "eclectic" approach to estimate indirect impacts, as there are so many inter-sectoral relationships that necessarily get overlooked.

TABLE 5

PULP MILLS INDIRECT ECONOMIC IMPACT – CONSTRUCTION PHASE

(IN USD MILLIONS)

	ORION	CMB	TOTAL	ORION (%)	CMB (%)
Manufacturing	32	37	69	32	88
Energy	8	-	8	8	-
Transport	7	*	7	7	1
Other Sectors	54	5	59	54	11
Total	100	42	143	100	100

* less than USD500,000.

Sources: HCG IO Model and TDT Nov. 03 p. 59.

The distribution, by sector, of the induced impacts for the construction phase are shown in Table 6.

TABLE 6

PULP MILLS INDUCED ECONOMIC IMPACT – CONSTRUCTION PHASE (IN USD MILLIONS)

	ORION	CMB	TOTAL	ORION (%)	CMB (%)
Manufacturing	11	N.A.	N.A.	18	N.A.
Energy	3	N.A	N.A	5	N.A
Construction	8	N.A	N.A	13	N.A
Transport	5	N.A	N.A	8	N.A
Other Sectors	33	N.A	N.A	56	N.A
Total	60	23	83	100	100

Sources: HCG IO Model; CMB - TDT Nov. 03 p.68

The induced impacts were calculated by HCG and TDT on the basis of the chain reaction from the increase in final demand, resulting from construction of the plants. HCG includes both consumption and investment final demand through an assumption of a fixed relationship between fixed investments and GDP. TDT uses a more conservative approach based on the increase in salaries generated, acknowledging a conservative bias in their results. The HCG IO model provides estimates of the indirect impacts by sector, the TDT results are global, as reflected in Table 6.

To compensate for the conservative coverage by TDT, a new table has been drawn up in order to provide a cumulative impact assuming that the magnitude of the impact from the construction of the mills relates directly to the scale of the investment.

In Table 7 these revised calculations of the economic impact of the two pulp mills for the construction phase have been tabulated according to the method suggested in the previous paragraph. It will be seen that the total impact is expected to be USD 417 millions, about 15 per cent higher than implied with the original TDT calculations. The impact in basic prices have been converted to arrive at the impact on GDP in producers’ prices through the addition of net taxes less subsidies on products.

It should be noted that these results do not contradict in any way the conclusions of the TDT study consultants, who openly acknowledge in several places throughout their report that their estimates have a conservative bias.

TABLE 7
ECONOMIC IMPACT – CONSTRUCTION PHASE
(IN USD MILLIONS)

IMPACT	ORION	CMB (1)	TOTAL (2)	CMB (3)	TOTAL (4)
Direct	86	43	129	36	123
Indirect	100	51	151	42	142
Induced	60	31	91	23	91
Total Basic Prices	246	125	371	102	356
Total Producer Prices	277	140	417		

(1) Revised calculations based on proportion of impacts using HCG methodology.
(2) Total of ORION and CMB using HCG methodology to show impacts for both mills
(3) Original calculations in TDT Nov. 03 and Jan. 05.
(4) Total of ORION and CMB using HCG methodology to calculate impacts for the ORION mill and TDT methodology to calculate impacts for the CBM mill.

9.6 Employment Impact – Construction Phase

ORION and CMB provided to their consultants the estimates of the direct employment required for the construction of the pulp mills and this is reflected by HCG and TDT in their calculations of direct employment impact, shown in Table 8.

TABLE 8

PULP MILLS DIRECT EMPLOYMENT IMPACT – CONSTRUCTION PHASE (PERSON-YEARS OF FULL TIME EMPLOYMENT)

	ORION (Persons)	CMB (Persons)	TOTAL (Persons)	ORION (%)	CMB (%)
Year 1	1,000	985	1,985	24	27
Year 2	3,000	1,155	4,155	71	32
Year 3	200	1,443	1,643	5	41
Total	4,200	3,583	7.783	100	100

Sources: HCG IO Model and Table 63 p. 115. CMB – TDT Nov. 03 p.58

The distribution of employment over the three years of construction for each of the pulp mills roughly follows the yearly allocation of capital investment as seen in Table 3. The data suggests that CMB will have a more intensive use of labor than ORION during the construction phase.

The distribution by sector of the indirect employment impact was derived for the ORION plant on the basis of the HCG IO Model estimates of economic activity by sector and the application of econometric relationships between output and employment. The CMB consultants make estimates for each of the industries directly involved in providing inputs into the construction of the plant: concrete and cement, steel, transport, quarries and other suppliers. The results are shown in Table 9.

TABLE 9

PULP MILLS INDIRECT EMPLOYMENT IMPACT

CONSTRUCTION PHASE

(PERSONS-YEARS OF FULL TIME EMPLOYMENT)

	ORION (Persons)	CMB (Persons)	TOTAL (Persons)	ORION (%)	CMB (%)
Manufacturing	1,561	921	2,482	27	78
Energy	72	-	72	1	-
Transport	65	18	83	1	2
Other Sectors	4,012	248	4,260	71	20
Total	5,710	1,187	6,897	100	100

Sources: HCG IO Model; TDT Nov. 03 p. 58

There is a substantial difference between the calculations of indirect employment by HCG and TDT. TDT provides some detailed information about the industries likely to be closely connected with the construction of the pulp mills but probably underestimates the likely total employment by not including sufficiently the service sectors.

The results of the calculations for induced employment are shown in Table 10. HCG relates induced employment to induced output, but there is no commentary in the HCG study either on the results or their validity. TDT uses a similar method to that employed in calculating induced value added, but assuming that half of the increase in additional salaries would be in the form of an increased number of full time positions.

TABLE 10

PULP MILLS INDUCED EMPLOYMENT IMPACT

CONSTRUCTION PHASE

(PERSON-YEARS OF FULL TIME EMPLOYMENT)

	ORION (Persons)	CMB (Persons)	TOTAL (Persons)	ORION (%)	CMB (%)
Manufacturing	327	N.A.	N.A.	13	N.A.
Energy	14	N.A	N.A	1	N.A
Construction	459	N.A	N.A	18	N.A
Transport	50	N.A	N.A	2	N.A
Other Sectors	1,662	N.A	N.A	66	N.A
Total	2,512	627		100	

Sources: ORION IO Model, TDT Nov. 03 p. 70.

As for indirect employment there are more substantial differences in the impacts than would be expected from the scale of construction.

The total employment resulting from the construction phase and reported by HCG and TDT is shown in Table 11.

TABLE 11

EMPLOYMENT IMPACT

CONSTRUCTION PHASE

(PERSON-YEARS OF FULL TIME EMPLOYMENT)

	ORION (Persons)	CMB (Persons)	TOTAL (Persons)	ORION (%)	CMB (%)
Direct	4,200	3,583	7,783	34	66
Indirect	5,710	1,187	6,897	46	22
Induced	2,512	627	3,139	20	12
Total	12,422	5,397	17,819	100	100

Sources: As per Tables 7,8 & 9.

In Table 12 the percentage distribution is shown of the calculated amounts of economic and employment impacts.

TABLE 12
ECONOMIC AND EMPLOYMENT IMPACTS
CONSTRUCTION PHASE
(PERCENTAGE DISTRIBUTION)

	ECONOMIC IMPACTS		**EMPLOYMENT IMPACTS**	
IMPACT	**ORION**	**CMB**	**ORION**	**CMB**
Direct	35	35	34	66
Indirect	41	41	46	22
Induced	24	23	20	12
Total	100	100	100	100

Note: There are some differences due to rounding.

Source: HCG IO Model and TDT November 2003.

For the economic impacts the relationships for the two mills are almost perfectly similar, the main differences, as indicated above, being the scale of the impacts. For the employment impacts, on the other hand, there are noticeable differences in the distribution as well as the scale of impacts.

For ORION both economic and employment impacts show similar patterns of distribution. The CMB distribution of economic and employment impacts differ considerably; particularly noticeable is the relatively large proportion of employment accounted for by direct employment in the construction of the pulp mills.

In the light of the inconsistencies in the results for the employment impacts of the two pulp mills a revised table (Table 13) has been drawn up, assuming that the level and distribution of employment impacts will be proportional to relative investments in the pulp mills and in accordance with the IO Model methodology used by HCG.

TABLE 13

EMPLOYMENT IMPACT - CONSTRUCTION PHASE REVISED

(PERSON-YEARS OF FULL TIME EMPLOYMENT)

IMPACT	ORION	CMB (1)	TOTAL (2)	CMB (3)	TOTAL (4)
Direct	4,200	2,122	6,322	3,583	7,783
Indirect	5,710	2,885	8,595	1,187	6,897
Induced	2,512	1,269	3,781	627	3,139
Total	12,422	6,277	18,699	5,397	17,819

(1) Revised calculations based on ORION methodology

(2) Total of ORION and CMB using ORION methodology to show impacts for both mills

(3) Original calculations in TDT Jan. 05.

(4) Total of ORION and CMB using ORION methodology to calculate impacts for the ORION mill and TDT methodology to calculate impacts for the CMB mill.

The major differences in the CMB results, between the revised Table 13 and the original Table 11, are a reduction in the amount of employment classified as "direct" and increases in the indirect and induced employment. The revised calculations imply an increase in the overall level of employment of about 5 per cent.

9.7 Trade Balance Impacts – Construction Phase

During the construction period HCG and TDT estimate, respectively, that there would be imports of goods and services totaling about USD740 million for the ORION plant and about USD398 million for the CMB plant.[11]

Both HCG and TDT made estimates of the impact of the construction of the pulp mills on the trade balance. The direct trade balance impact is given in Table 14.

[11] Botnia June 2004, p. 109 and TDT Nov. 03 pp. 19,23,56 & 71.

TABLE 14

DIRECT TRADE BALANCE IMPACT – CONSTRUCTION PHASE

(USD MILLIONS)

IMPORTED MATERIALS	ORION	CMB	TOTAL	ORION (%)	CMB (%)
2005	138	75	213	19	19
2006	581	139	720	78	36
2007	26	173	199	3	45
Total	745	387	1,132	100	100

Sources: HCG IO Model and June 2004 p. 116, TDT Nov. 03 pp. 19, 23 & 56.

In addition to the direct balance of trade impacts calculations were made of the indirect and induced imports resulting from the impacts on the economy during the construction phase. While much smaller than the direct impacts from the import of materials for the construction of the mills, including the freight and insurance components, these indirect and induced impacts are still significant. The impacts are broadly consistent both in scale and with regards to their distribution over time. Table 15 shows the indirect and induced trade balance impact.

TABLE 15

INDIRECT AND INDUCED TRADE BALANCE IMPACT

CONSTRUCTION PHASE - (USD MILLIONS)

	ORION	CMB	TOTAL	ORION (%)	CMB (%)
2005	4	3	7	25	27
2006	11	4	15	69	36
2007	1	4	5	6	36
Total	16	11	27	100	100

Sources: HCG IO Model, TDT Nov. 03 p. 56 and p. 71.

Table 16 shows the total trade balance impact.

TABLE 16

TOTAL TRADE BALANCE IMPACT

CONSTRUCTION PHASE - (USD MILLIONS)

IMPORTED MATERIALS	ORION	CMB	TOTAL	ORION (%)	CMB (%)
2005	142	78	220	19	21
2006	592	142	734	78	35
2007	27	178	205	3	44
Total	761	398	1,159	100	100

Sources: As for Tables 14 & 15.

The resulting negative trade balance will be about USD1.2bn for the entire construction period, although in the last year of construction there will already be some exports of pulp, which would reduce the negative impact in that year. To put the results in perspective, in 2004 Uruguayan exports (f.o.b) and imports (c.i.f) were USD 2.9bn and USD 3.1bn, respectively, with a slightly positive trade balance. Over the “normal” period 1999-2001 Uruguayan imports (c.i.f) exceeded exports (f.o.b) by USD 1.2 billion per year. This is about the same order of magnitude as the trade deficits seen in the “normal” years, prior to the “River Plate Crisis” of 2002. Since 2002 thee has been more of a balance between imports and exports, but as the economy recovers it is expected that the trade deficits will return.

9.8 Impact On Central Government Revenues – Construction Phase

Central government revenues consist primarily of taxes on personal and corporate income, indirect taxes and social insurance payments. HCG calculated these for the ORION mill, but no calculations were found in the TDT reports for the CMB mill. Estimates have been made for the construction period for CMB by scaling the revenues in relation to the relative amount of investment in the plants. The results are shown in Table 17.

TABLE 17

IMPACT ON CENTRAL GOVERNMENT REVENUES

CONSTRUCTION PHASE - (USD MILLIONS)

IMPACTS	ORION	CMB	TOTAL
Direct and Indirect	42	13	55
Induced	21	7	28
Total Impacts	63	20	83

Source: HCG IO Model and CIS Consultants' estimates.

As shown in the above table, it is expected that the central government will collect about USD 83million in additional revenues over the 3 year construction period. To put this in perspective, central government revenues in 2004 were about USD 4bn, indicating that the additional revenue collections over the construction period will be equivalent to about 2 per cent of 2004 government revenues.

9.9 Regional Impacts – Construction Phase

HCG paid a great deal of attention to estimating the regional impact of the project. The methodology employed consisted of taking the results on a national level from the IO Model as a starting point and applying a percentage breakdown for four geographical units: the departments of Rio Negro (where the mills will be located); Soriano (the department directly to the west of Rio Negro); Paysandú (the department immediately to the north of Rio Negro), the departments most affected by the projects; and the rest of Uruguay. The distribution of impacts was made on the basis of best judgment by HCG's team of local economists, each of which has considerable knowledge of the economics and employment situation in the region. TDT considered the regional impact, but provided no specific estimates of the contribution to departmental GDP resulting from the construction phase of the mill.

Consequently, in order to estimate the impacts of the CMB pulp mills, and hence the cumulative impact, it was decided to use the method established for the distribution of the impacts to individual departments from the HCG study and assume an impact proportional to the size of the investment. The results for the economic impacts are shown in Table 18.

TABLE 18

REGIONAL ECONOMIC IMPACTS – CONSTRUCTION PHASE

(USD MILLIONS)

	ORION	CMB	TOTAL	TOTAL (%)
Rio Negro	137	69	206	56
Soriano	22	11	33	9
Paysandu	27	14	41	11
Rest of Country	60	31	91	24
Total (Basic Prices)	246	125	371	100
Taxes on Products	31	16	47	
Total (Producers' Pr.)	277	140	417	

Sources: HCG IO Model and June 2004 pp.75–82 and CIS Consultants' estimates.

As would be expected the largest portion of the impacts are to the Department of Rio Negro, which amount to about USD206 million over the construction period, equivalent to 56 per cent of the total national impact (measured in basic prices). The Department of Paysandú, which will contribute an important amount of building materials, would account for about USD 41 million during the construction period, or about 11 per cent of the total impacts. The Department of Soriano would account for slightly less than Paysandu. The impact on the rest of the country would be about USD91 million, or about 24 per cent of the total impact. To put this in perspective, the gross departmental products for Rio Negro, Soriano and Paysandú in 2003 were USD184 million, USD230 million and USD321 million, respectively. This implies that during the three year construction period the Department of Rio Negro would increase its departmental product by the equivalent of more than the entire product in 2003. The impact on the Departments of Soriano and Paysandú would be the equivalent of about 14 per cent of departmental product for Soriano and 13 per cent for Paysandú.

Table 19 examines the regional employment impacts for the construction phase of the ORION pulp mill, as reported by HCG. It is expected that 60 per cent of employment would be created in the Department of Rio Negro. This is qualified by a statement that this could include also persons commuting to Rio Negro daily, who are not necessarily resident of Rio Negro.

TABLE 19

ORION REGIONAL EMPLOYMENT IMPACTS – CONSTRUCTION PHASE (PERSON-YEARS OF FULL TIME EMPLOYMENT)

	DIRECT	INDIRECT	INDUCED	TOTAL	%
Rio Negro	4,200	2,176	1,062	7,437	60
Soriano		615	273	888	7
Paysandu		1,555	53	1,608	13
Rest of Country		1,365	1,124	2,489	20
Total	4,200	5,710	2,512	12,422	100

Sources: HCG IO Model and June 2004 pp. 88-93.

HCG estimates that a total of 4,200 person-years of full time employment would be created during the three years of the construction phase of the ORION mill. In the peak year (2006) about 3,000 persons, from Rio Negro itself, or day commuters to Rio Negro, are expected to be employed in the construction.

The departmental distribution for employment for the CMB mill was derived from the revised calculations as reported in Table 13, using the HCG methodology to calculate the relevant impacts and the HCG methodology to determine departmental employment allocation. Table 20 reports these results.

TABLE 20

CMB REGIONAL EMPLOYMENT IMPACTS – CONSTRUCTION PHASE (PERSON-YEARS OF FULL TIME EMPLOYMENT)

	DIRECT	INDIRECT	INDUCED	TOTAL	%
Rio Negro	2,122	1,099	537	3,758	60
Soriano		311	138	449	7
Paysandu		786	27	813	13
Rest of Country		690	568	1,258	20
Total	2,122	2,885	1,270	6,277	100

Sources: CIS Consultants estimates.

Table 21 summarizes the allocation to departments of total employment for the two pulp mills.

TABLE 21

TOTAL REGIONAL EMPLOYMENT IMPACTS – CONSTRUCTION PHASE

(PERSON-YEARS OF FULL TIME EMPLOYMENT)

	DIRECT	INDIRECT	INDUCED	TOTAL	%
Rio Negro	6,322	3,275	1,598	11,195	60
Soriano		926	411	1,337	7
Paysandu		2,341	80	2,421	13
Rest of Country		2,054	1,692	3,746	20
Total	6,322	8,595	3,781	18,699	100

Sources: As for Tables 20 & 21.

Table 22 shows, for the construction phase of both of the mills combined, the percentage distribution of the different employment impacts on each department and for the rest of the country.

TABLE 22

TOTAL REGIONAL EMPLOYMENT IMPACTS – CONSTRUCTION PHASE

(PERCENTAGE DISTRIBUTION OF FULL TIME EMPLOYMENT)

	DIRECT	INDIRECT	INDUCED	TOTAL
Rio Negro	100	38	42	60
Soriano		11	11	7
Paysandu		27	2	13
Rest of Country		24	45	20
Total	100	100	100	100

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The employment impacts would be strongest for the Department of Rio Negro, which will benefit from all of the direct impacts, 38 per cent of the indirect and 42 per cent of the induced impacts. These impacts would represent, over a three year period, an increase in employment in excess of the equivalent of more person-years employment than would have been supplied by a fully employed departmental labor force in 2004. As mentioned previously, the existing departmental labor force is insufficiently large to supply all of the expected employment requirements and this will encourage day commuting from neighboring departments and migration from other parts of the country.

9.10 Definitions Of Impacts – Operational Phase

For the examination of the operational phase adjustments are made in the definitions of direct, indirect and generated impacts, in similar fashion to those made for the construction phase. These are shown in Table 23.

TABLE 23

CLASSIFICATION OF IMPACTS – OPERATIONAL PHASE

Definition of Impacts Adopted	Impacts in ORION SE Study	Impacts in CMB SE Study
Direct	Direct – Mill Production	Direct – Mill Production
Indirect	Direct – Other Sectors	Indirect
Induced	Indirect	Induced

HCG and TDT illustrate the impacts of the operational phase of the plants by reporting for a representative year during which the plants will be operating at full capacity.. The years 2008 and 2016 were chosen for this purpose for the CMB and ORION pulp mills, respectively.

9.11 Economic Impact – Operational Phase

It was not possible from the SE reports to determine the off-take price for pulp agreed by each company. This price is important because this would be the price which is reported in Uruguayan international trade statistics and which, when intermediate inputs are subtracted, determines value added and hence the contribution to the GDP. For both mills the commercial accounting information in the reports does not allow ready conversion to national accounting, which is the framework in which the impacts on the GDP are determined. For example ocean freight on pulp, which would appear in the national accounts of the importing country and not in those of Uruguay, is considered in the ORION report to be an intermediate input.[12]

Some adjustments have been made in an attempt to arrive at a reasonable estimate of the effective off-take price for ORION, given that the HCG have estimated the value-added in the representative year at USD107 million.[13]

For CMB it was brought to the attention of the CIS Consultants that the pulp export price would be USD372/ton. This implies that adjustments have to be made to the estimate of the value added presented in the TDT report of January 2005, as in that document it was assumed that the export price for pulp would be USD 500/ton.

In Table 24 calculations have been made to establish the relationship between various off-take prices and value added contribution to the Uruguayan economy. The first column uses the export price given in the HCG June 2004 report; the second column calculates the effective export price implicit from a value-added of USD107 million and using information on fixed, variable costs and sales as explicitly or implicitly implied in the IO Model and the HCG June 2004 report. The third column takes the pulp export price of USD 500/ton, as given in the TDT January 2005 report and calculates the resulting value added, given the information on sales and costs provided in the TDT report and in the 2004 feasibility study for the CMB plant. The last column employs the off-take price of USD 372 per ton, which it is understood is the price agreed for CMB sales of pulp f.o.b. Uruguay.

[12] HCG June 2004, Table 60, p. 110.
[13] HCG IO Model and June 2004 Table 61, p. 114.

TABLE 24

DIRECT IMPACT GDP – OPERATIONAL PHASE

(IN USD MILLIONS)

	ORION	ORION	CMB	CMB
Off-Take Pulp Price (USD/Ton)	353	328	500	372
Pulp Sales (USD Million FOB)	353	328	240	179
Electricity Sales	2	2	3	3
Total Sales	355	330	243	182
Fixed Costs	35	35	8	8
Variable Costs	140	140	89	89
Amortization	47	47	27	27
Total Inputs	221	221	123	123
Value Added	134	107	120	59

Sources: Based on HCG June 2004, p.110 and CMB, Feasibility Study for the CMB Pulp Mill, 2004.

The direct impacts, for a year of full capacity production, for the ORION and CMB mills have been taken to be USD107 million and USD 59 million respectively. As the value added for ORION is the same as that used as an input for the IO Model there would be no changes in the results for ORION. However, there would be considerable differences in the case of CMB and in order to make these changes the CIS Consultants have made appropriate changes to the results found in the TDT January 2005 report.

Table 25 provides a summary of the indirect economic impact for the representative year in the operational phrase as reported by HCG and TDT.

TABLE 25

PULP MILLS INDIRECT ECONOMIC IMPACT – OPERATIONAL PHASE (IN USD MILLIONS)

	ORION	CMB	TOTAL	ORION (%)	CMB (%)
Forestry	19	31	50	30	54
Manufacturing	6	13	19	10	22
Energy	1	11	12	2	18
Construction	2		2	3	
Transport	21	2	23	34	3
Other Sectors	13	2	15	20	3
Total	62	58	120	100	100

Sources: ORION IO Model and TDT January 05 p.39

The HCG results in Table 25 are derived directly from the HCG IO Model. The TDT calculations include as indirect impacts USD 27.7 million for the value of wood utilized by the plant that would otherwise not be exported or consumed domestically and USD 10 million, the value of excess electricity generated by CMB and sold to the national grid. The impacts on the forestry sector would be the value added by the additional activity caused by the increased sales to the pulp mill, rather than the value of the output. The sales of electricity, considered to be USD 3.09 million in the 2004 CMB feasibility study, would already have been included in the calculation of direct impacts.

Table 26 shows the induced economic impacts, calculated by HCG and TDT.

TABLE 26

PULP MILLS INDUCED ECONOMIC IMPACT – OPERATIONAL PHASE

(IN USD MILLIONS)

	ORION	CMB	TOTAL	ORION (%)	CMB (%)
Forestry	0	N.A.	N.A.	0	N.A.
Manufacturing	5	N.A.	N.A.	15	N.A.
Energy	2	N.A.	N.A.	5	N.A.
Construction	7	N.A.	N.A.	19	N.A.
Transport	3	N.A.	N.A.	9	N.A.
Other Sectors	18	N.A.	N.A.	52	N.A.
Total	35	4	39	100	100

Sources: ORION IO Model and TDT January 05, p. 27.

The ORION results for the induced economic impact are derived from the HCG IO Model. The induced impacts for CMB for the operational phase were derived by TDT in a similar fashion to those for the construction phase, namely on the basis of the chain reaction from the increase in consumption, resulting from operation of the plant.

To compensate for the overestimation of the contribution of the forestry and electricity sectors and for the conservative estimates of indirect and induced impacts by TDT, a new table has been drawn up in order to provide a cumulative impact, assuming that the magnitude of the impact from the operations of the mills relates directly to the relative scale of the pulp production. The results are shown in Table 27.

TABLE 27

ECONOMIC IMPACT – OPERATIONAL PHASE

(IN USD MILLIONS)

IMPACT	ORION	CMB (1)	TOTAL (2)	CMB (3)	TOTAL (4)
Direct	107	59	166	117	224
Indirect	62	34	96	58	120
Induced	35	19	54	4	39
Total Basic Prices	204	111	316	179	382
Total Producer Prices	214	117	331		

(1) Revised calculations based on the same proportional distribution of indirect and induced impacts as in the HCG methodology

(2) Total of ORION and CMB using HCG methodology to show impacts for both mills

(3)Original calculations in TDT Jan. 05.

(4) Total of ORION and CMB using HCG methodology to calculate impacts for the ORION mill and TDT methodology to calculate impacts for the CMB mill.

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Using the methodology described above, it is estimated the combined economic impact from operating the plants at full output will be about USD 331 million per year. Of this, over 50 per cent will be direct impact of plant production and indirect and induced impacts should account for about 30 and 20 per cent, respectively.

To put this in perspective the GDP in 2004 is estimated to be about USD 13.216 million. The economic impact from the operational phase of the mills would therefore represent about 2.5 per cent of 2004 GDP.

Rough calculations were made to establish the impact on gross national product (GNP), which takes into account net payments to the rest of the world. For the representative year the economic impact of the ORION and CMB pulp mills would be the equivalent of 0.9% and 0.6%, respectively, of GNP implying a total impact of 1.5 per cent of GNP.

9.12 Employment Impact – Operational Phase

The direct impact on employment in the operational phase of the mills will be 300 direct jobs in each mill.[14]

Indirect employment was estimated by the SE Study consultants using the methodologies described in the section on employment during the construction phase. The results are shown in Table 28.

TABLE 28

PULP MILLS INDIRECT EMPLOYMENT IMPACT – OPERATIONAL PHASE (PERSON-YEARS OF FULL TIME EMPLOYMENT)

	ORION	CMB	TOTAL	ORION (%)	CMB (%)
Forestry	2,235	113	2,348	56	30
Manufacturing	326	107	433	8	28
Energy	-65		-65	-2	
Construction	78		78	2	
Transport	656	83	739	16	22
Other Sectors	746	77	823	19	20
Total	3,976	380	4,356	100	100

Source: ORION IO Model and TDT January 2005 p.39.

There is a major discrepancy between the two reports in the estimates of the indirect impact of the pulp mills on employment in the forestry sector. To understand which order of magnitude should be considered to be the best approximation, the CIS Consultants have calculated the employment impacts for a year in which both pulp mills are producing at full capacity and the consumption of wood is assumed to be 3.5 million cubic meters for the ORION plant and 1.71 million cubic meters for the CMB plant. Table 29 provides a summary of the calculations of wood requirements, with and without the pulp mills.

[14] HCG June 2004, p. 24 and TDT January 2005, p. 11.

TABLE 29

WOOD CONSUMPTION AND EXPORTS

SCENARIOS WITH AND WITHOUT PULP MILLS

(IN MILLION CUBIC METERS)

CONSUMPTION/EXPORTS	WITH MILLS	W/OUT MILLS	DIFFERENCE
ORION Consumption	3.5	0.0	3.5
CMB Consumption	1.7	0.0	1.7
Chips Exports	2.2	2.2	0.0
Log Exports	0.5	2.0	-1.5
Other Domestic Consumption	2.5	2.5	0.0
Total Consumption/Exports	10.4	6.7	3.7

Source: CIS Consultants.

The difference in wood production between the two scenarios is approximately 3.7 million cubic meters. For Uruguay the employment multipliers for the forestry sector are 0.0125 full time jobs per hectare and 0.0255 jobs per hectare if seasonal employment is taken into account.[15] These multipliers and an estimated yield of about 25 cubic meters per hectare per year, would imply that it can be expected that an additional 1,845 full time jobs would be created as a direct result of the output of the pulp mills, taking into account lower amount of log exports that would result in the scenario with the pulp mills. In addition about 1,900 part time jobs would be created. This would indicate that the TDT substantially underestimate the indirect employment impact for the forestry sector. The HCG calculations of 2,235 full time jobs for the ORION plant might be slightly, though not excessively, high.

Table 30 provides the results from the calculations of induced employment impacts. The HCG results were obtained from the IO Model and those of TDT seem to be estimated in proportion to the calculations on the induced economic impacts.

[15] SGS in its certification of the plantations of Forestal Oriental, for the Forest Stewardship Council (FSC).

TABLE 30

PULP MILLS INDUCED EMPLOYMENT IMPACT – OPERATIONAL PHASE

(PERSON-YEARS OF FULL TIME EMPLOYMENT)

	ORION	CMB	TOTAL	ORION (%)	CMB (%)
Forestry		N.A.	N.A.		N.A.
Manufacturing	349	N.A.	N.A.	9	N.A.
Energy	13	N.A.	N.A.	*	N.A.
Construction	955	N.A.	N.A.	25	N.A.
Transport	56	N.A.	N.A.	1	N.A.
Other Sectors	2,505	N.A.	N.A.	65	N.A.
Total	3,878	112	3,990	100	100

* Less than 0.5%

Source: HCG IO Model and TDT January 2005, pp. 26-27.

The induced employment impact in the HCG calculations is particularly strong for “other sectors”, construction and manufacturing.

Table 31 shows the total employment impact during a year of full capacity production. As in the case of the economic impact these calculations are revisions in the case of CMB and use the HCG methodology, which is considered a broader indicator of employment impacts. The original calculations made by TDT are also shown in the same table.

TABLE 31

EMPLOYMENT IMPACT - OPERATIONAL PHASE

(PERSON-YEARS OF FULL TIME EMPLOYMENT)

IMPACT	ORION	CMB (1)	TOTAL (2)	CMB (3)	TOTAL (4)
Direct	300	300	600	300	600
Indirect	3,976	2,094	6,070	381	4,357
Induced	3,879	2,043	5,922	112	3,991
Total	8,155	4,438	12,593	793	8,948

(1) Revised calculations based on HCG methodology

(2) Total of ORION and CMB using HCG methodology to show impacts for both mills

(3) Original calculations in TDT Jan. 05.

(4) Total of ORION and CMB using HCG methodology to calculate impacts for the ORION mill and TDT methodology to calculate impacts for the CMB mill.

The results using the HCG methodology suggest that 12,593 new jobs will be created, only about 600 of which would be provided directly by the pulp mills. An additional 6,070 person-years of indirect employment would be created in other sectors of the economy and there would be induced employment creation of 5,922 person-years, primarily in the service sectors.

As a point of reference it is estimated that in 2004 national employment totaled about 1.37 million person-years. The forestry sector accounted for about 10,600 person-years. The employment impact of the operation of the mills would therefore represent about 0.9 per cent of the 2004 total.

9.13 Trade Balance Impacts – Operational Phase

As Uruguay completes its recovery form the “River Plate Crisis” of 2002, it can be expected that the historic patterns of large trade deficits will tend to resume, hence the importance of these pulp mill projects, which will provide steady stream of exports.

Table 32 shows the balance of trade effect for a representation year with full capacity pulp production.

TABLE 32

TRADE BALANCE IMPACT - OPERATIONAL PHASE

(USD MILLIONS)

	ORION	CMB	TOTAL
Exports (gross)	353	179	532
Wood exports	-28	-13	-41
Exports (net)	326	166	492
Imports c.i.f.	-155	-75	-230
Indirect Imports c.i.f.	-10	-8	-18
Balance of Trade	+ 161	+83	+244

Sources: HCG IO Model, TDT January 2005, p. 24 & p.40.

The total trade impact includes the positive effect of the value of the exports of pulp, estimated in Table 24, and the negative effect of the loss of revenue from logs that without the pulp mills would have overseas markets, as well as the negative effect of imported materials for the pulp mill. Additional imports will also be induced as a result of the chain reaction increase in consumption and investment resulting from the operations of the pulp mills. The positive effect on the trade balance in a representative year of full capacity production for the pulp mills represents the equivalent of about 22 per cent of the "normal" trade deficit.

9.14 Impact On Central Government Revenues – Operational Phase

Central government revenues consist primarily of taxes on personal and corporate income, indirect taxes and social insurance payments. HCG Consultants calculated these for the ORION mill, but no calculations were found in the reports for the CMB mill. Estimates have been made for a representative year at full capacity production for the CMB pulp mill by scaling the revenues in relation to the relative amount of output of the plants. Table 33 shows the impact on central government revenues.

TABLE 33

IMPACT ON CENTRAL GOVERNMENT REVENUES

OPERATIONAL PHASE

(USD MILLIONS)

	ORION	CMB	TOTAL
Direct and Indirect	16	8	24
Induced Impacts	10	5	15
Total Impacts	26	13	39

Source: ORION IO Model and CIC Consultants' estimates.

As shown in Table 33 it is expected that the central government will collect about USD38 million in additional revenues each year, when the plants are at full production. This would be equivalent to about 1 per cent of central government revenues in 2004.

9.15 Regional Impacts – Operational Phase

The estimate of regional impacts has been made on the basis of the allocation technique found in the HCG SE study, for the reasons mentioned above in relation to the estimation of these impacts for the construction phase.

The total estimated economic impacts for the CMB were given in Table 27 and these were distributed among the regional departments in accordance with the informed judgment of the panel of HCG local economists, who are familiar with the economy and employment situation in the region. The results are shown in Table 35.

TABLE 35

REGIONAL ECONOMIC IMPACTS

OPERATIONAL PHASE

(USD MILLIONS)

	ORION	CMB	TOTAL	TOTAL (%)
Rio Negro	144	79	223	71
Soriano	8	5	13	4
Paysandu	15	8	23	7
Rest of Country	37	20	57	18
Total (Basic Prices)	204	111	315	100
Taxes on Products	10	6	16	
Total (Producers' Prices)	214	117	331	

.Sources: HCG IO Model and June 2004 pp. 82-84 and CIS Consultants' estimates.

As would be expected the largest portion of the impacts are to the Department of Rio Negro, which amount to about USD 223 million in the representative year of full capacity pulp production, equivalent to 71 per cent of the total national impact (measured in basic prices). The Department of Paysandú would account for about USD 23 million in that year, or about 7 per cent of the total impacts. The Department of Soriano would account for USD 13 million, or about 4 per cent of totalimpacts. The impact on the rest of the country would be about USD 57 million, or about 18 per cent of the total impact.

To put this in perspective, the gross departmental products for Rio Negro, Soriano and Paysandú in 2003 were USD 184 million, USD 230 million and USD 321 million, respectively. This implies that in the representative year of full capacity pulp production the Department of Rio Negro would increase departmental product by the equivalent of more than the entire product in 2003. The impact on the Departments of Soriano and Paysandú would be the equivalent of about 13 per cent of departmental product for Soriano and 23 per cent for Paysandú.

The estimates of national employment impact for a representative year of the mills at full capacity production were shown in Table 31. Regional distribution of these impacts was made in the same manner as the distribution of economic impacts. The results are shown in Tables 36 through 38.

TABLE 36

ORION REGIONAL EMPLOYMENT IMPACTS – OPERATIONAL PHASE

(PERSON-YEARS OF FULL TIME EMPLOYMENT)

	DIRECT	INDIRECT	INDUCED	TOTAL	%
Rio Negro	300	1,441	1,291	3,033	37
Soriano	0	195	531	726	9
Paysandu	0	952	390	1,342	16
Rest of Country	0	1,388	1,667	3,055	38
Total	300	3,976	3,879	8,155	100

Source: HCG IO Model and June 2004 pp. 94-96.

TABLE 37

CMB REGIONAL EMPLOYMENT IMPACTS – OPERATIONAL PHASE

(PERSON-YEARS OF FULL TIME EMPLOYMENT)

	DIRECT	INDIRECT	INDUCED	TOTAL	%
Rio Negro	300	759	681	1,740	39
Soriano	0	102	280	382	9
Paysandu	0	502	205	707	16
Rest of Country	0	731	878	1,609	36
Total	300	2,094	2,044	4,438	100

Source: CIS Consultants' estimates, based on HCG pp. 94-96.

TABLE 38

TOTAL REGIONAL EMPLOYMENT IMPACTS – OPERATIONAL PHASE

(PERSON-YEARS OF FULL TIME EMPLOYMENT)

	DIRECT	INDIRECT	INDUCED	TOTAL	%
Rio Negro	600	2,200	1,973	4,773	38
Soriano	0	297	811	1,108	9
Paysandu	0	1,453	595	2,048	16
Rest of Country	0	2,119	2,545	4,664	37
Total	600	6,070	5,922	12,593	100

Sources: Tables 36 and 37.

The employment impact would be significant for the Department of Rio Negro, which would account for about 38 per cent of the national total and would represent the equivalent of about 47 per cent of the 2004 Rio Negro's labor force. The departmental labor force would not be able to supply all of the additional labor requirements and this would encourage day commuting from neighboring departments and migration from other parts of the country.

The employment impact on the Departments of Soriano and Paysandú is also significant but rather smaller than that on Rio Negro, representing increases of 5% and 7% of the respective departmental labor forces. The impact on the rest of the country is almost important as that on Rio Negro, reflecting increased employment in the service sectors and manufacturing.

9.16 Impacts On Revenues Of The Department Of Rio Negro

HCG made estimates of the impact on departmental revenues for a representative year of full capacity production of the mills. No estimates of these revenues were made by TDT; therefore these have been assumed to be proportional to the relative scale of production of the two mills. The results are shown in Table 39.

TABLE 39

IMPACTS ON DEPARTMENTAL TAXATION – RIO NEGRO-OPERATIONAL PHASE (USD THOUSANDS)

	ORION	CMB	TOTAL	TOTAL (%)
Vehicular Taxes	199	96	295	32
Municipal Taxes	89	43	132	15
Real Estate Taxes	256	123	379	41
Other Taxes	74	36	110	12
Total	618	298	916	100

Source: HCG June 2004 pp. 101-104.and CIS Consultants' estimates.

Regional government has limited access to revenues and it is expected that additional revenues will be slightly less than USD 1 million per year, representing the equivalent of about 10 per cent of 2004 revenues.

9.17 Abbreviations and Acronyms

BCU	Banco Central del Uruguay – the Uruguayan Central Bank
C.I.F.	Cost, insurance and freight
CIS	Cumulative Impact Study
CMB	Celulosas de M'Bopicuá, the pulp mill of ENCE
ENCE	Empresas Nacional de Celulosas Españolas
F.O.B.	Free on board
FSC	Forest Stewardship Council
FTZ	Free trade zone
GDP	Gross Domestic Product
GNP	Gross National Product
GOU	Government of Uruguay
HCG	HCG Environment – the consultants responsible for the SE Study of the ORION pulp mill
IFC	International Finance Corporation of the World Bank
IO	Input-Output
SE	Socio-economic
SER/CIS	Socio-economic report of the Cumulative Impact Study
SGS	Société Général de Surveillance, an inspection, verification, testing and certification company
TDT	Tea, Deloitte, Touche – the consultants responsible for the economic impact study of the CMB pulp mill
USD	United States dollars