



JUJUY

PROVINCIAL PRODUCTION REPORT

May 2019

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1. Economic Overview



Jujuy. GDP, surface area and population.

Area and population

Indicators	Jujuy	NOA (*)	Argentina
Area(**) (Km2)	53.219	559.864	3.745.997
Share of the area in the total National (%)	2,7	12,6	-
Population 2018	753.891	5.546.434	44.494.502
Share of the population in the total National (%)	1,7	12,5	-
Population density 2018 (inhab/km2)	14,2	9,9	11,9

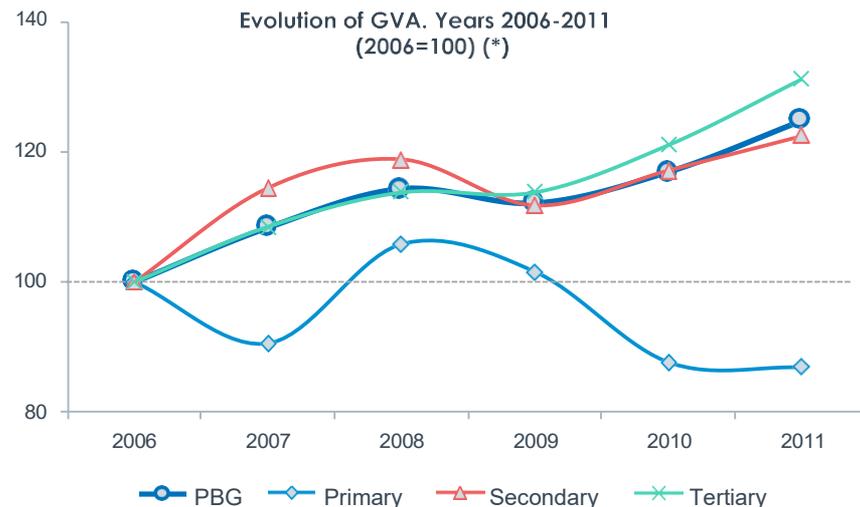
(*) NOA Region: Salta, Jujuy, Tucumán, Santiago del Estero, Catamarca and La Rioja.
 (**) The Antarctic surface (965,597 km²) was considered. It does not include the Falkland Islands, South Georgia and the South Sandwich Islands. Source: SSPMicro based on INDEC.

Composition of the GVA of Jujuy vs. Argentina. Years 2006 and 2011



Source: SSPMicro based on INDEC and the Provincial Ministry of Finance.

(*) The GVA have different calculation bases, the province with base 1993 and nation base 2004.



(*) GDP at constant 1993 prices

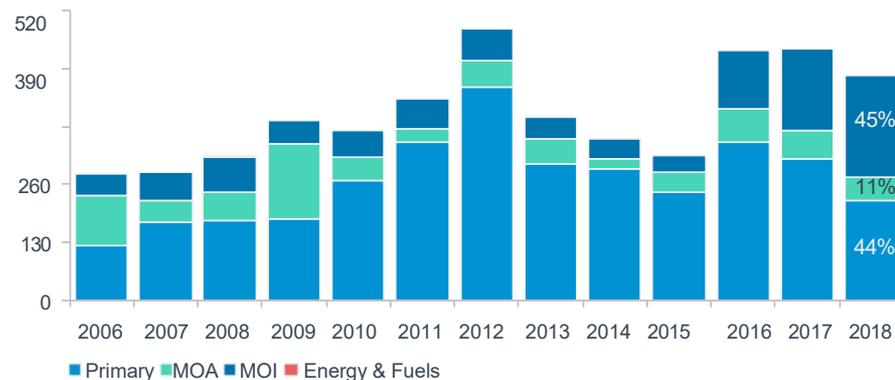
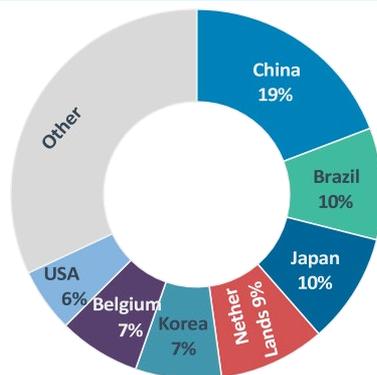
Evolution of the participation of the PBG (ECLAC) Years 1997, 2002 and 2005

Indicators	1997	2002	2005
Share of the PBG of Jujuy in the National Total (%)	0,9	0,8	0,8
Share of GDP in the total NOA region (%)	13,8	12,3	12,0
Share of the GDP of the NOA in the national total (%)	6,3	6,8	6,8

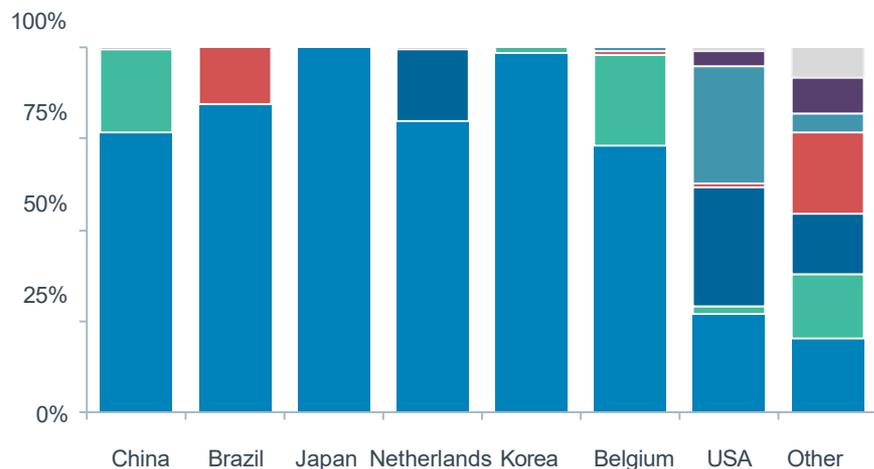
Source: SSPMicro based on ECLAC.



Indicators	Jujuy
Exports (million US\$ FOB)	503,5
Position in the provincial ranking	13th
Share of domestic exports	0,8%



Destination markets and chains. Year 2018



Main export chains. Year 2018

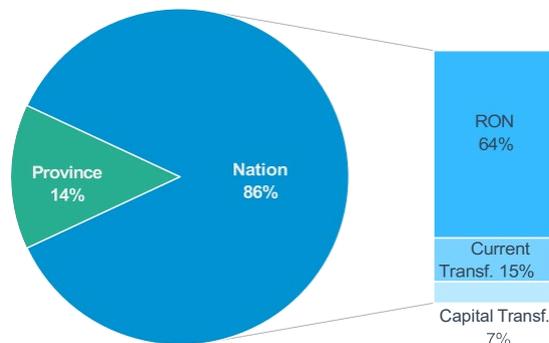
N.	Main chains	Exports			Var. % i. a.	Contribution to growth %
		Millions US\$ FOB	Part. %	Part. Now %		
1	Mining	305,0	60,6	60,6	-10,3	-6,2
2	Tobacco	61,1	12,1	72,7	-20,0	-2,7
3	Citrus fruits	45,1	9,0	81,7	26,2	1,7
4	Legumes	44,3	8,8	90,5	-7,6	-0,6
5	Sugar	17,4	3,5	93,9	-51,3	-3,3
6	Forestry	16,9	3,4	97,3	48,5	1,0
	Other	13,7	2,7	100	-	-0,4
	Total Provincial	503,5	100	-	-10,6	-10,6



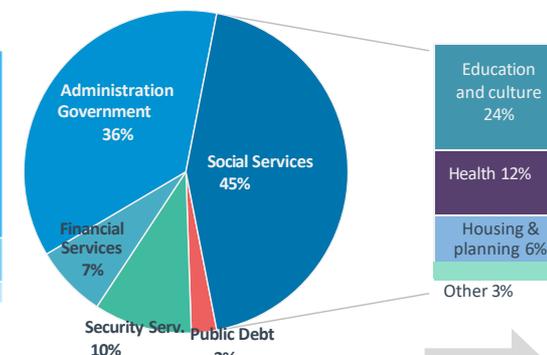
Total income (current pesos and part. %)

Concept	2006		2017	
	Mill. \$	Part. %	Mill. \$	Part. %
National Tributaries (RON)	1.190	69,2	20.297	63,9
Current transfers	177	10,3	4.826	15,2
Capital transfers	163	9,5	2.228	7,0
Domestically Sourced Income	1.530	88,9	27.350	86,1
Provincial Tributaries	144	8,4	3.685	11,6
<i>Gross Revenue</i>	99	5,7	2.961	9,3
<i>Others</i>	45	2,6	724	2,3
Non-taxable	22	1,3	359	1,1
<i>Royalties</i>	2	0,1	6	0,0
<i>Others</i>	20	1,2	352	1,1
Social security contributions	0	0,0	0	0,0
Other income	24	1,4	381	1,2
Provincial income	190	11,1	4.425	13,9
Total Revenue	1.721	100	31.775	100

Composition of income by origin Year 2017

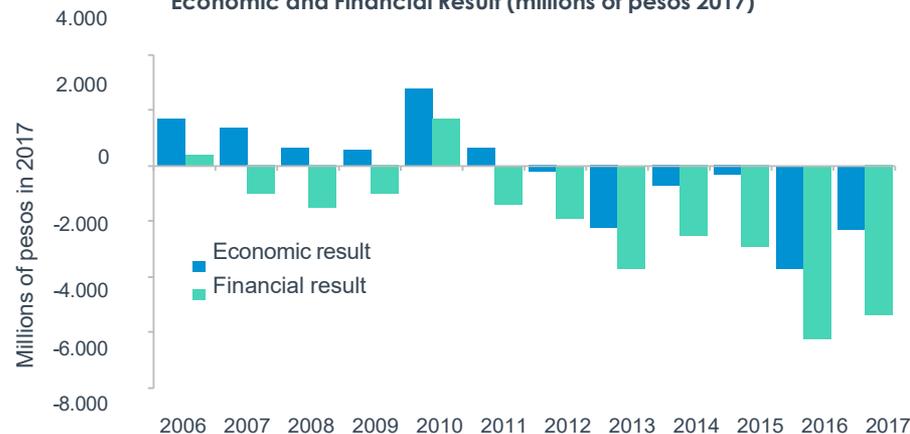


Expenditure by Purpose. Year 2017



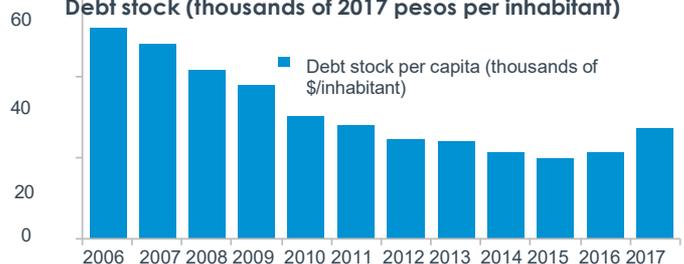
For more Expense information [View Annex](#)

Economic and Financial Result (millions of pesos 2017)



Debt stock (thousands of 2017 pesos per inhabitant)

Thousands of 2017 pesos per



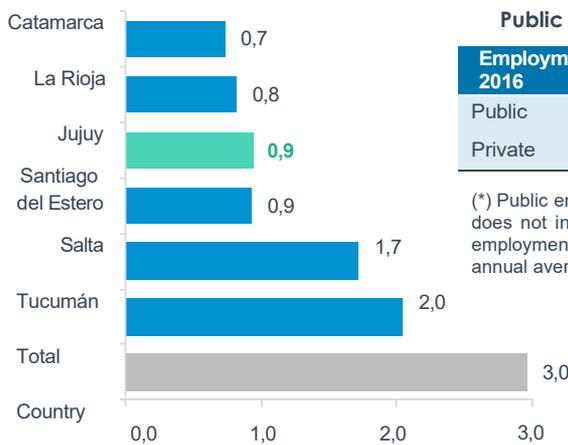
Jujuy. Employment and income indicators.

Indicators of occupation and living conditions

Occupational	Jujuy (*)	NOA (**)	Country Total (***)	Jujuy (*)	NOA (**)	Country Total (***)
	2017 - III Trimester			2018 - III Trimester		
	Living conditions			Living conditions		
Activity Rate (%)	46,7	44,3	46,3	43,2	43,5	46,7
Employment Rate (%)	43,9	41,3	42,4	41,2	40,5	42,5
Unemployment Rate (%)	5,9	6,7	8,3	4,6	6,6	9,0
	2017 - I Semester			2018 - I Semester		
Poverty (% people)	23,8	28,2	28,6	30,3	28,6	27,3
Indigence (% people)	1,7	4,7	6,2	4,3	3,6	4,9

(*) The Jujuy – Palpalá agglomeration was considered. (**) It includes the agglomerations: Gran Catamarca, Gran Tucumán – Tafí Viejo, Jujuy – Palpalá, La Rioja, Salta and Santiago del Estero – La Banda. (***) Total Country corresponds to the 31 urban agglomerations surveyed by the EPH.

Private/public employment ratio. Year 2016



Source: SSPMicro based on STyE, DNAP and INDEC

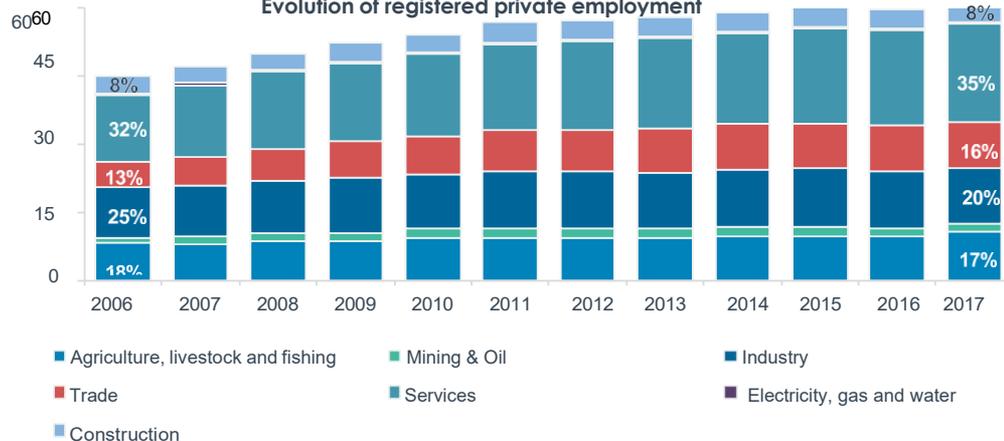
Public employment per 1000 inhabitants(*)

Employment 2016	Jujuy	NOA	Country Total
Public	86,6	66,4	50,6
Private	80,8	87,4	150,2

(*) Public employment considers the provincial levels (it does not include municipalities or the nation). Private employment corresponds to the jobs registered on an annual average.

(*) The average salary for the Agriculture, Livestock and Fisheries, and Services sectors is grouped by weighting by the number of jobs. Salary amounts include contributions

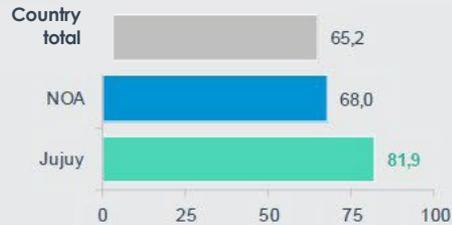
Evolution of registered private employment



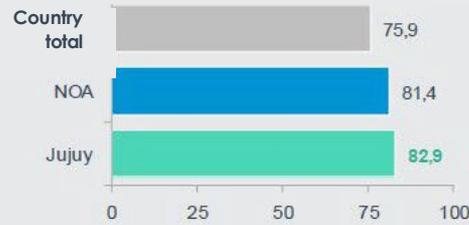
Registered employment and private sector wages(*)

Branch of activity	Jujuy					Country Total			
	Registered private employment average				Average salary	Private employment registered avg.		Average salary	
	2017 (thousands of positions)	Part. %	Var. % i. a.	Part. % Total Nal.	2017 (\$)	2017 (thousands of positions)	Part. %	2017 (\$)	
Agriculture, livestock and fishing	10,5	17,0	11,0	2,9	11.085	366	5,5	16.049	
Mining & Oil	1,9	3,0	-6,1	2,3	39.503	81	1,2	76.087	
Industry	12,4	20,0	-0,8	1,0	27.866	1.236	18,6	31.297	
Trade	10,2	16,5	0,5	0,8	20.475	1.215	18,3	23.510	
Services	21,5	34,8	2,8	0,7	20.196	3.196	48,1	25.203	
Electricity, gas and water	0,5	0,8	1,9	0,7	46.845	75	1,1	58.004	
Construction	4,8	7,8	18,7	1,0	15.359	482	7,2	19.158	
Total	61,8	100	3,7	0,9	20.702	6.652	100	26.233	

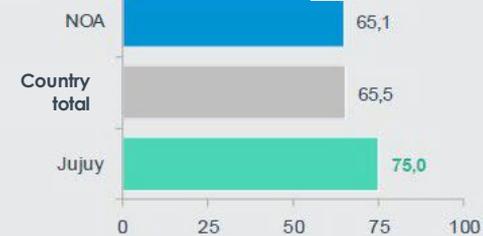
Adequate housing. III quarter 2018 (Jujuy-Palpalá; %)



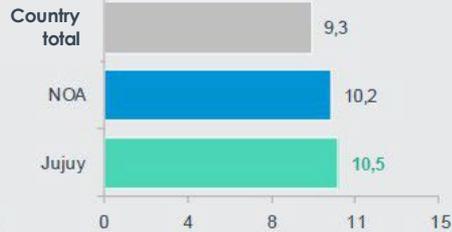
Households with internet access. IV quarter 2017 (Jujuy-Palpalá; %)



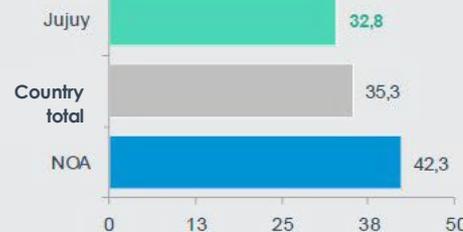
Employees with completed secondary school. III quarter 2018 (Jujuy-Palpalá; %)



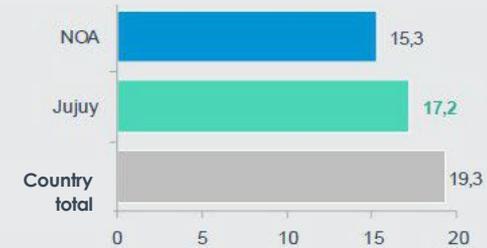
Infant mortality. 2017 (rate per 1.000 live births)



Salaried workers without retirement discount. IV quarter 2018 (Jujuy-Palpalá; %)



Income Gap. III quarter 2018 (Jujuy-Palpalá; decile 10/decile 1)



Note: the indicators that use the EPH as a source consider reference localities. In the case of Jujuy, it was taken into account the Jujuy-Palpalá agglomeration. For the NOA region, the data responds to the agglomerations Gran Catamarca, Gran Tucumán - Tafí Viejo, Jujuy - Palpalá, La Rioja, Salta and Santiago del Estero - La Banda). The country total corresponds to the 31 urban agglomerations surveyed by the EPH.

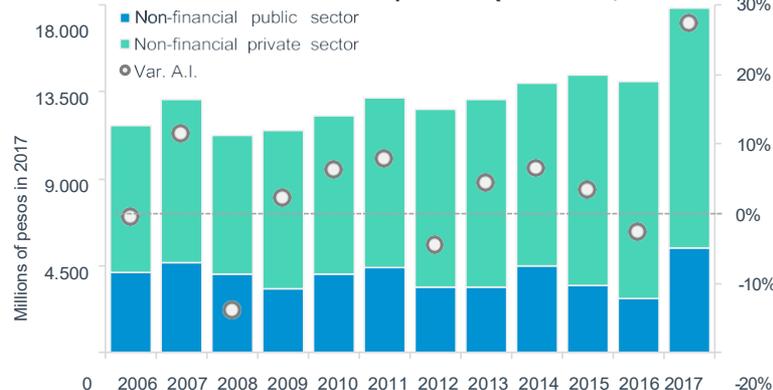
Source: SSPMicro based on DNAP and INDEC.



Deposits and loans of the province (million pesos and part. % in the national total)

Non-Financial Sector	Millions of Pesos	Part. % in the National Total		Part. % in the National Total	
		2006	2017	II Trim. 2017	II Trim. 2018
Deposits	18.763	0,6	0,7	0,6	0,6
- Public Sector	3.962	0,7	0,9	0,4	0,4
- Private Sector	14.801	0,5	0,6	0,6	0,6
Loans	15.066	0,4	0,8	0,7	0,7
- Public Sector	1.366	0,0	5,3	0,0	4,4
- Private Sector	13.700	0,5	0,7	0,7	0,7

Deposits in the non-financial sector of the province (millions of \$ 2017 and var. YoY)



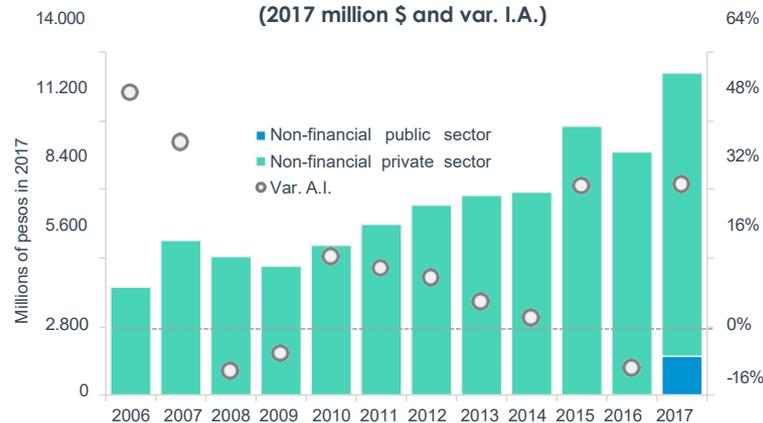
Loan-to-Deposit Ratio (%)



Ratio of deposits in dollars to Total deposits (%)



Loans to the non-financial sector of the province (2017 million \$ and var. I.A.)



The non-financial sector is made up of the public and non-financial private sector

Source: SSPMicro based on the BCRA



Production Indicators

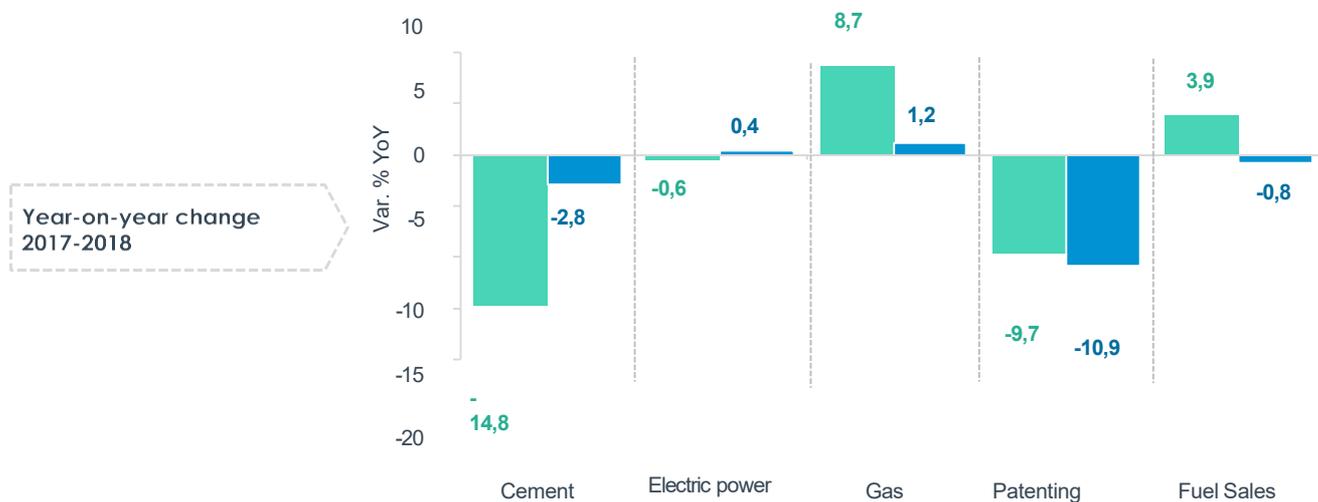
Product	UM	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Total Nat. Part. (in %) (*)	Source
Tobacco	Thousands of tons	39	43	44	44	49	45	42	40	41	45	38	41	34,6	MAGyP
White and raw sugars	Thousands of tons	523	484	575	524	464	480	476	362	471	456	474	n/a	23,5	CAA
Bean	Thousands of tons	36	34	34	29	33	33	36	18	36	41	23	23	5,4	MAGyP
Orange	Thousands of tons	89	114	105	114	92	116	120	120	128	140	161	162	15,8	FEDERCITRUS
Tangerine	Thousands of tons	19	25	23	25	21	26	29	27	29	31	34	35	7,6	FEDERCITRUS
Grapefruit	Thousands of tons	13	12	11	14	14	11	14	14	14	14	15	15	13,4	FEDERCITRUS
Forest logs	thousands of m3	124	160	101	117	92	93	93	68	68	78	69	n.d.	0,5	MAGyP
Paper pulp	Thousands of tons	103	100	101	101	122	116	84	113	122	107	101	n.d.	12,3	MAGyP
Paper	Thousands of tons	35	152	150	150	160	160	154	163	158	153	151	n.d.	14,1	MAGyP
Lithium	tn	0	0	0	0	0	0	0	0	0	1.726	11.846	11.406	42,9	Sec. of Mining
Zinc	Thousands of tons	30	27	30	32	33	34	40	39	28	30	23	23	100	Sec. of Mining
Silver	tn	21	34	43	23	210	254	286	310	233	374	374	262	26,3	Sec. of Mining
Lead	Thousands of tons	12	17	21	25	23	26	26	29	30	30	28	40	100	Sec. of Mining
Hotel occupancy(**)	thousands of overnight stays	243	281	283	227	228	254	246	238	230	281	272	248	0,5	INDEC

(*) Participation corresponds to the last year for which data are presented. (**) The data belong to the City of Jujuy.



Evolution of demand and participation indicators in the country as a whole

Indicator	UM	2006	2007	2008	2009	2010	2011	2012	2013	2014		2015	2016	2017	2018	Total country part. %
Cement consumption Port.	Thousands of tons	123	143	144	152	149	162	162	195	196		233	190	191	163	1,4
Electrical power distribution	GWh	626	736	755	775	826	882	961	992	1.011		1.075	1.064	1.093	1.087	0,8
Gas distribution	Million m ³	259	300	279	263	308	293	288	302	303		308	291	308	335	1,1
Patenting	Miles of Units	5	6	6	6	8	10	11	12	9		9	10	13	12	1,5
Fuel sales	Thousands of m ³	181	226	209	211	215	235	231	249	249		254	251	262	272	1,2



Source: SSPMicro based on AFCP, CAMMESA, ENARGAS, ACARA and Sec. Energía



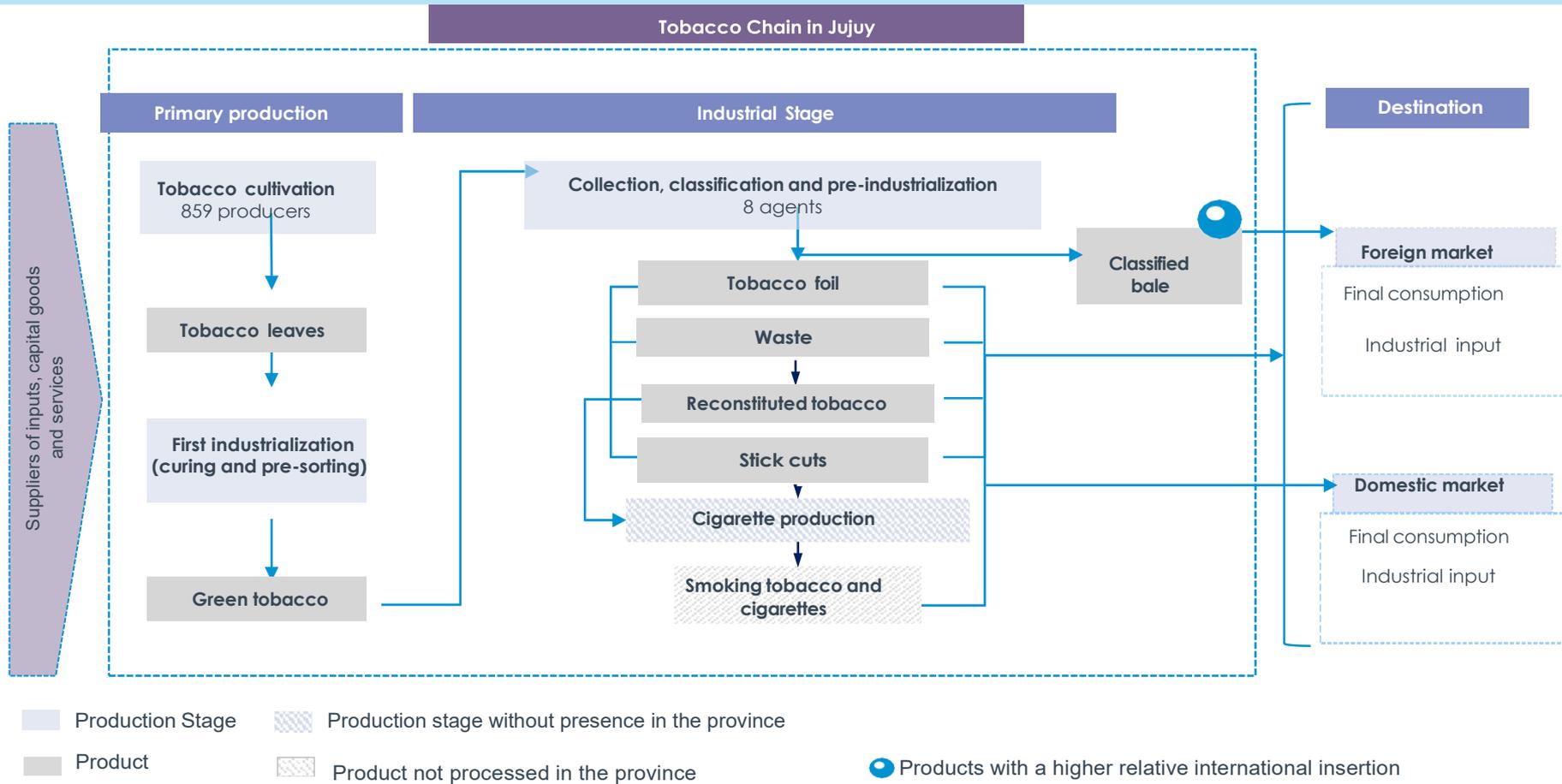
Productive branches	GVA	GPV	Salaried employees		Premises		Salaried by premises (positions)
	Part. %	Part. %	Positions	Part. %	Quantity	%	
Industrial activities							
Manufacture of foodstuffs N.O.C	36,3	44,0	2.607	49,6	148	18,0	17,6
Manufacture of paper and paper products	33,1	24,4	595	11,3	4	0,5	148,8
Manufacture of non-metallic mineral products N.O.C	11,6	8,0	196	3,7	99	12,0	2,0
Manufacture of tobacco products	7,7	13,6	624	11,9	6	0,7	104,0
Production and processing of meat, fish, fruits, legumes, vegetables, oils and fats	2,5	3,1	173	3,3	15	1,8	11,5
Manufacture of wood, cork, straw and braided materials products	2,2	1,8	173	3,3	58	7,0	3,0
Beverage brewing	1,7	1,7	299	5,7	21	2,5	14,2
Manufacture of metal products for structural use, tanks, deposits and steam generators	0,8	0,5	81	1,5	66	8,0	1,2
Furniture and mattress manufacturing	0,6	0,4	69	1,3	80	9,7	0,9
Manufacture of processed metal products N.O.C.; metal Work Services	0,5	0,3	28	0,5	53	6,4	0,5
Top ten industrial activities - Total	97,0	97,8	4.845	92,2	550	66,7	8,8
Other industrial activities	3,0	2,2	411	7,8	274	33,3	1,5
Total Industry	100	100	5.256	100	824	100	6,4
Mines and quarries, trade and services							
Retail sale of products N.O.C., other than used products, in specialist shops	15,5	12,9	1.544	11,1	2.051	18,7	0,8
Human Health Services	8,7	9,2	1.336	9,6	1.049	9,6	1,3
Retail sale of foodstuffs, beverages and tobacco in specialist shops	8,7	6,8	512	3,7	2.814	25,7	0,2
Retail except specialized	7,6	6,9	1.134	8,2	528	4,8	2,1
Telecommunications Services	7,6	8,4	271	1,9	173	1,6	1,6
Top five activities - Total	48,1	44,2	4.797	34,5	6.615	60,5	0,7
Other activities	51,9	55,8	9.111	65,5	4.324	39,5	2,1
Total mines and quarries, trade and services	100	100	13.908	100	10.939	100	1,3
Activities Total							
Total Industry	43,6	56,5	5.256	27,4	824	7,0	6,4
Total mines and quarries, trade and services	56,4	43,5	13.908	72,6	10.939	93,0	1,3
Provincial Total	100	100	19.164	100	11.763	100	1,6

Source: SSPMicro based on data from the 2004 National Economic Census (CLANAE CNE04 open to 3 digits).





2. Main value chains



Source: SSPMicro

Geographical distribution of production



Territorial Configuration

- The crop is located in the "valley zone", mainly in the Valley of the Pericos, located to the south, bordering the producing area of Salta (Lerma and Siancas Valleys).
- The tropical climate is conducive: irrigation is used in winter and spring while the abundant rains provide water during the summer.
- The activity in Jujuy and Salta assumes a business-type modality, with larger farms and hiring of labor. In the other provinces (mainly in Misiones) it comprises a peasant structure with family labor.
- In 2017, almost 15 thousand hectares of tobacco were cultivated in the province (24% of the national area). All of it was grown with Virginia tobacco, of which Jujuy accounts for 44% of the country's total. This variety requires a curing process with a stove that is carried out on the farm and requires a high initial investment.
- Production is concentrated in El Carmen (92.8%) and, to a lesser extent, in Palpalá (3.7%), San Antonio (2.1%), Manuel Belgrano (0.7%), San Pedro (0.6%) and Santa Bárbara (0.1%).
- The collection centers are located in the town of Perico (El Carmen), that also receives tobacco from Salta.

Source: SSPMicro based on the Ministry of Agroindustry.

Activity level

- In 2018, in the country, the varieties harvested were Virginia (61%), Burley (36%) and creole (3%).
- Jujuy is the main national producing province with 35% of the total. It is dedicated exclusively to Virginia tobacco, being the first national producer of this variety (55%).
- In the period 2006-2018, production registered an average of 42 thousand tons. In 2018, it decreased 8% YoY, registering a production of 37 thousand tons.

Virginia Tobacco Production
(tonnes and var. %)

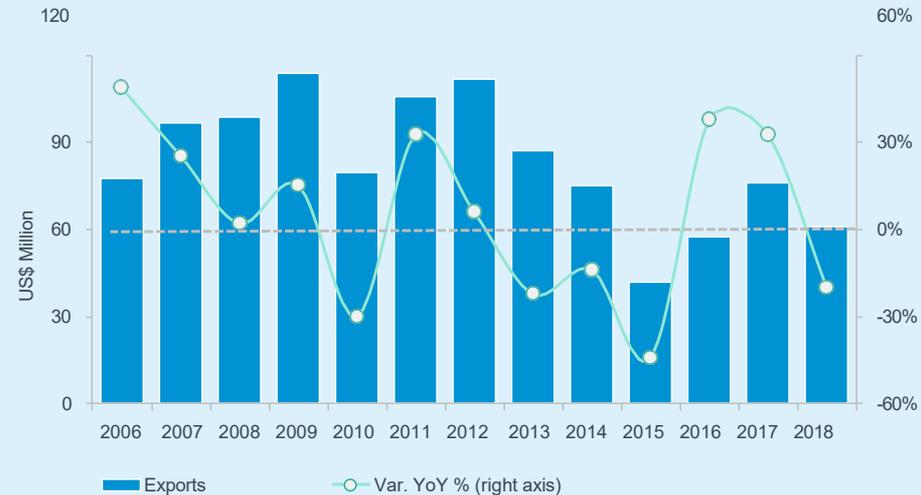


Source: SSPMicro based on the Ministry of Agroindustry.

Exports

- Between 2006 and 2018, the value exported averaged US\$ 81 million. In 2018, exports reached US\$ 61 million, with a decrease of 20.0% YoY. In 2017, they accounted for 44% of provincial production.
- In 2018, tobacco exports accounted for 12% of provincial foreign sales.
- The main destination market was China (36%). Behind them were located South Africa (19%), Paraguay (18%) and Belgium (15%). The rest of the destinations comprise 12%.

Exports of the sector (million dollars and var. %)



Source: SSPMicro based on INDEC.

Main agents

- In the primary sector, farms are large business units with salaried employees.
- In 2017, Jujuy showed the highest yield per producer: 859 producers averaged 44 tons each. It is followed by Salta with 1,491 producers and 21 tonnes.
- In 2017, the collection was carried out with the following shares: 37% Cooperativa Tabacalera de Jujuy; 21% Alliance One; 13% Massalin Particulares; 9% China Tabaco International; 4% Cooperativa Tabacalera de Salta; 7% Tabes SA; 7% Acopiadora SA; 1% Montecarlo.

Employment

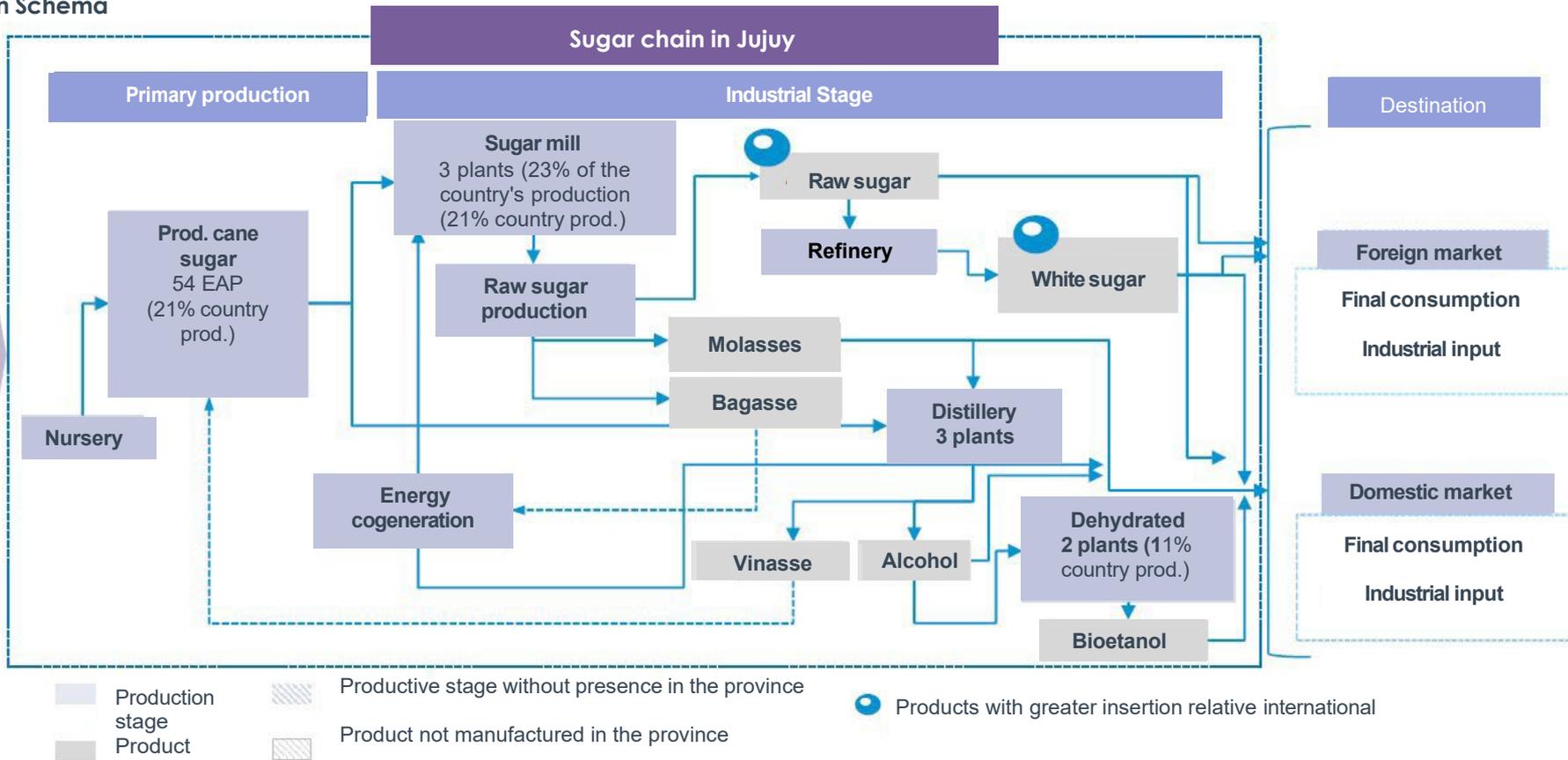
- Tobacco production is characterized by intensive
- In 2017, the national industrial sector registered 6,283 formal jobs (-5.6% YoY). At the provincial level, registered work is estimated to represent 10% of the country's total.

Public policies

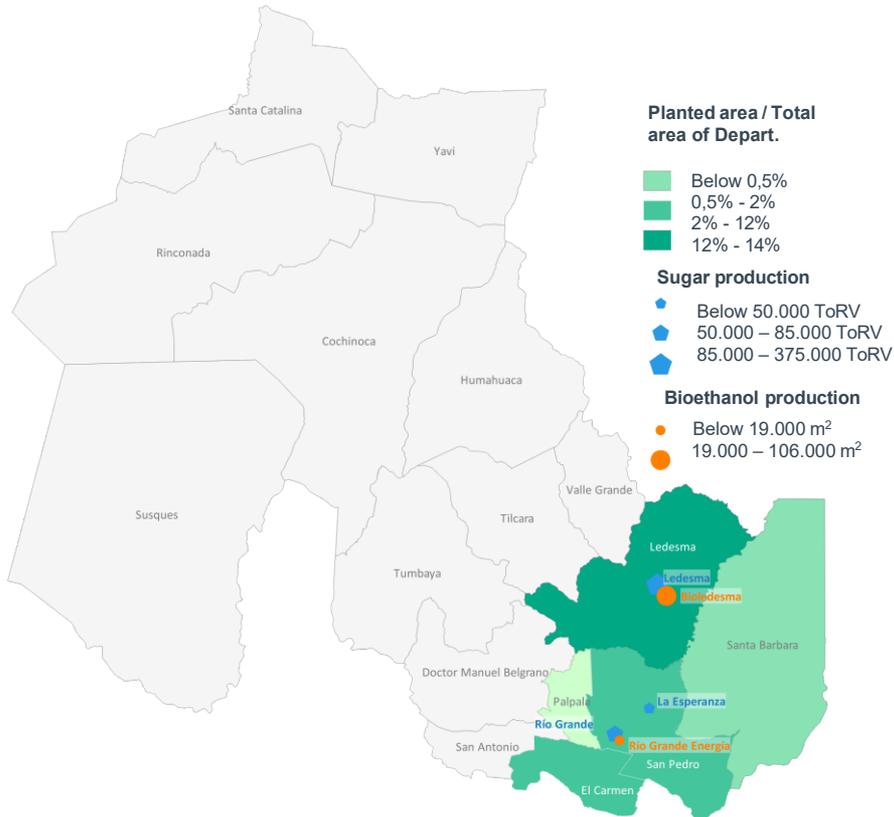
National

- **National Tobacco Law (19.800/1972)**: regulates tobacco activity in the country. Requires a register of buyers/collectors; it creates the Special Tobacco Fund (FET) that assures the primary producer an additional price to the collection price paid by the industry. By means of a provincial law, in Jujuy it was established that the FET is administered by the provincial Tobacco Chamber.
- **Internal Taxes (Law 24,674/1996)**: by Law 27,430/2017 the Internal Tax rate for cigarettes was established at 70%.
- **Additional Emergency Tax on the Sale of Cigarettes (24.625/1996)**.
- **National Tobacco Control Law (26.687/2011)**: regulates advertising, promotion and consumption.
- **Export duties**: by Decree 133/2015 they were eliminated (they were between 5% and 10%); Decree 793/2018 sets until 12/31/2020 an export duty of 12% with a limit of \$ 3 and \$ 4 for each dollar exported for industrial and primary products, respectively.
- **Refunds**: by Decree 1341/2016 the refunds were raised to a level between 2.7% and 5.0%; by Decree 767/2018 the refunds were reduced to a level between 0.75% and 2.5%.
- **Non-taxable minimum for employer contributions (Decree 128/2019)**: the implementation of the total non-taxable minimum planned for 2022 for 2019 was brought forward, alleviating the payment of employer contributions.

Chain Schema



Geographical distribution of production



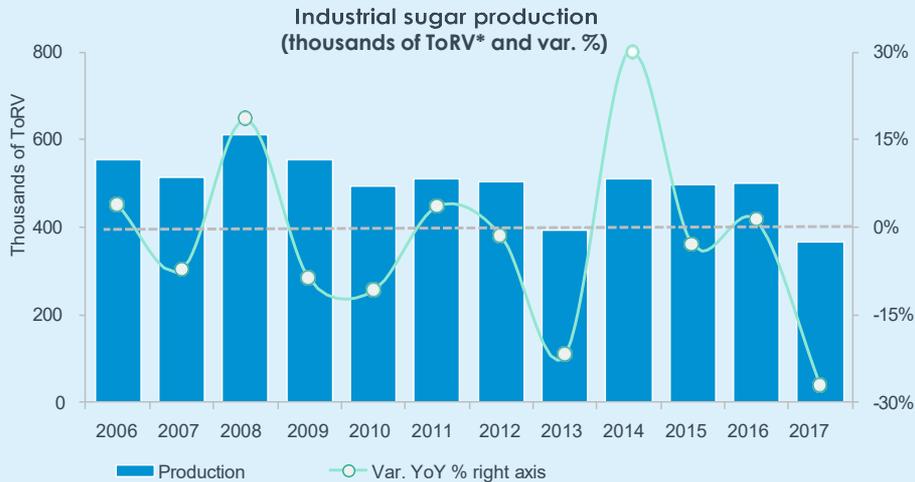
Territorial Configuration

- Sugarcane is produced in the foothills of the Sub-Andean Sierras in the southeast of the province, where climatic conditions (hot, humid and with low risk of frost) are favorable.
- Production dates back to the first half of the nineteenth century, but it was with the arrival of the railroad in 1891, which connects with the main centers of consumption, that industry gained momentum.
- Jujuy and Salta are characterized by greater concentration and vertical integration in relation to Tucumán. Likewise, productivity per hectare and sugarcane yields were always higher in the northern provinces, although the gap was decreasing.
- Sugarcane cultivation is carried out in the departments of Ledesma, San Pedro, El Carmen, Santa Bárbara and Palpalá. In the 2005-06 campaign, some 72,000 hectares of sugarcane were planted in Jujuy. The Ledesma sugar mill has more than half of that area (40 thousand hectares). Then there are two mills that exceed 10 thousand hectares. In the remaining area, they produce independent sugarcane growers.
- 75% of the sugar is made in the department of Ledesma and the remaining 25% in San Pedro. Bioethanol is produced by the Ledesma Sugar Mill in Libertador General San Martín (85%) and by the Río Grande Sugar Mill in La Mendieta (15%).

Source: SSPMicro based on CAA, Secretariat of Agroindustry and Ministry of Energy.

Activity level

- Jujuy is the second largest sugarcane-producing province in the country (21% of the country's total).
As for processed sugar, it represents 23% of the national total.
- Industrial sugar production registered a downward trend: in the period 2006-2017, the contraction was 34%. Between those years, the average of processed sugar was 501 thousand TMVC.
- On the other hand, there has been significant progress in the development of Bioethanol: In the period 2013-2018, it increased by 35%. The production of this biofuel is intended to supply the domestic market.



(*) Metric Tons of Raw Value
Source: SSPMicro based on the Ministry of Agroindustry.

Exports

- In the period 2006-2018, the average exported reached US\$ 47 million. Record highs were recorded in 2006 and 2009 (40% of provincial exports). Foreign sales include raw sugar and white sugar.
- In 2018, exports amounted to US\$ 17 million (-51.3% YoY). In turn, the sugar value chain accounted for 3% of provincial exports. Jujuy accounted for 27% of national sugar exports.
- The main destinations were the United States (51%), Chile (40%), Uruguay (3%), Belize (2%) and others (4%).

Exports of the sector (million dollars and var. %)



Source: SSPMicro based on INDEC.

Main agents

- 90% of the sugarcane processed by the mills is produced in-house. The rest comes from independent, medium and large producers. According to the 2002 National Agricultural Census, there were 54 agricultural farms (EAPs) dedicated to sugar cane.
- In Jujuy, three mills with different technological profiles coexist. Ledesma stands out, which produces 17% of the national total and 75% of the provincial production. The rest of the sugar is produced by Río Grande (16%) and La Esperanza (9%). The mills have an alcohol distillery, while Ledesma and Río Grande also have bioethanol production plants.

Employment

- In the last three decades, the integral mechanization of the harvest resulted in a decrease in employment; permanent employment was reduced and outsourcing was extended through contractors who provide labor.
- In 2018, Ledesma employed 8,000 workers in all its activities in the country, of which 2,000 are dedicated to the production of sugar. Río Grande has approximately 800 employees. La Esperanza has a plant of around 600 workers.

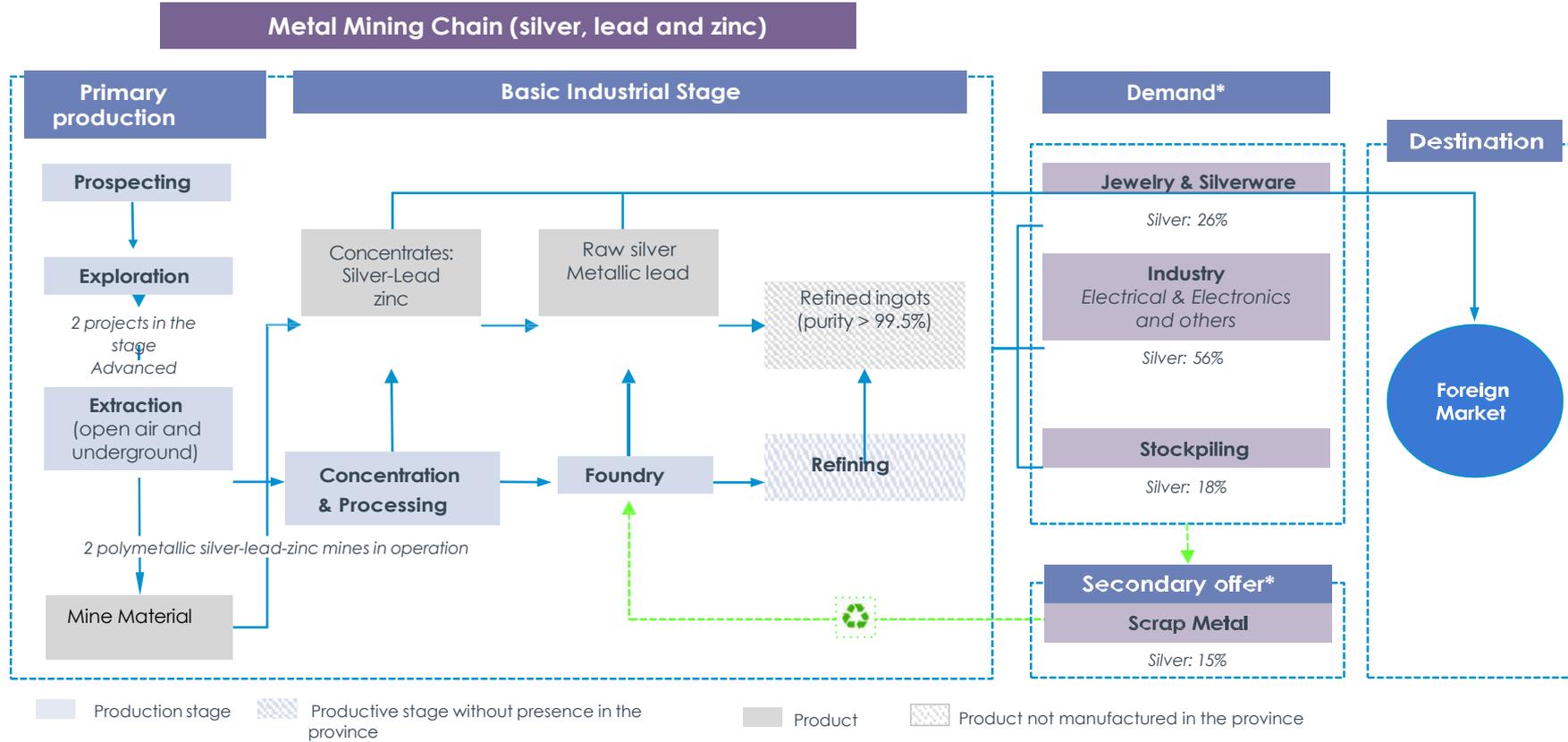
Public policies

National

- **Biofuels Law:** established a mandatory cut of bioethanol in gasoline and tax benefits. In 2016, the cut was extended from 10% to 12%, for the benefit of the mills of the NOA. The purchase price of the refineries is set by the Ministry of Energy.
- **Sugar-alcohol table:** it was created in April 2016 in order to achieve an equitable distribution of the benefits of bioethanol and make all the links in the chain transparent.
- **Program to Increase the Competitiveness of the Sugar Sector** of the NOA (PROICSA): services and financing for productive transformation and diversification.
- **Tariff policy for sugar imports:** the sector was excluded from the Mercosur Customs Union. There is a fixed tariff of 20% plus a specific sliding tariff; the intra-zone rate is 90% of the Common External Tariff (CET).
- **Export duties:** by Decree 133/2015 they were eliminated; Decree 793/2018 sets until 12/31/2020 an export duty of 12% with a limit of \$ 3 for each dollar exported for industrial products.
- **Refunds:** by Decree 1341/2016 the refunds were raised to 5%; by Decree 767/2018 they were reduced to 2.5%.
- **Non-taxable minimum for employer contributions** (Decree 128/2019): as in tobacco, the entire non-taxable minimum provided for 2022 was brought forward.

Metalliferous Chain Chart

Suppliers of supplies, machinery and equipment. Mining services.

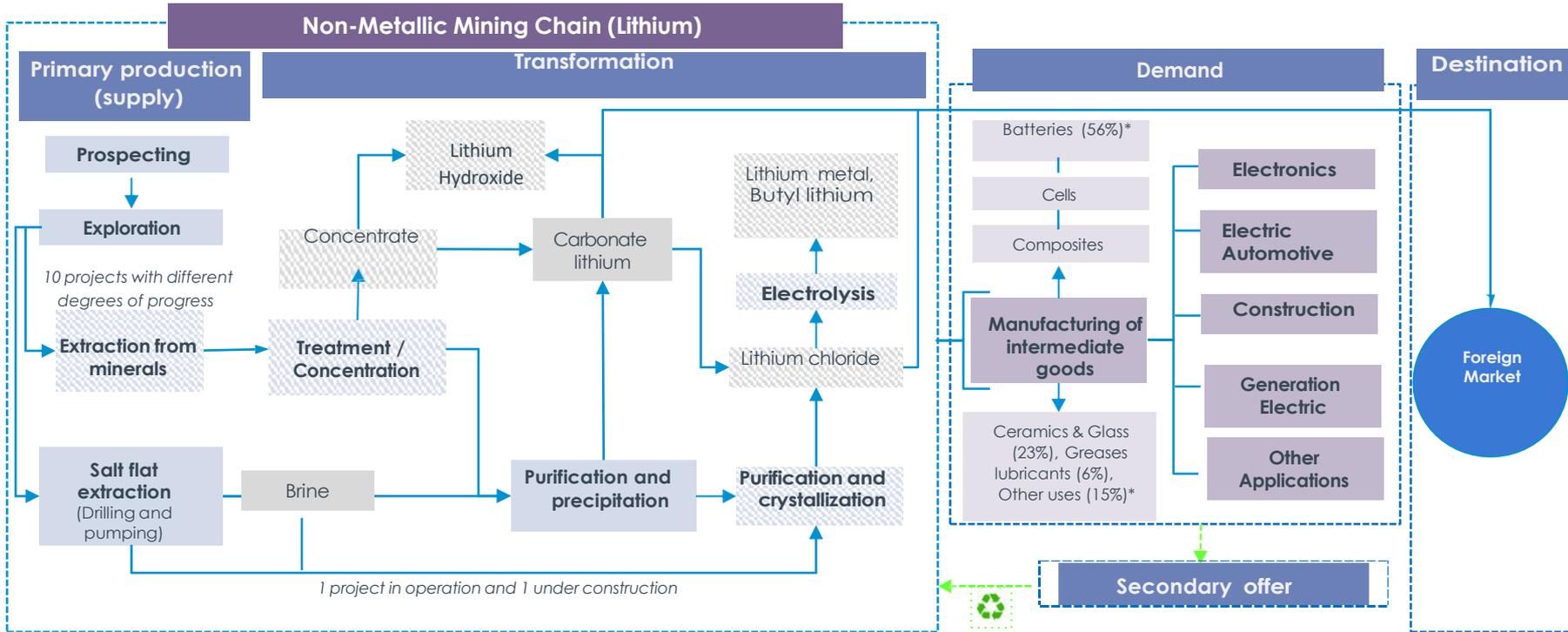


*The data correspond to the world market average for the year 2017 (World Silver Survey 2018, prepared by GFMS Thomson Reuters).

Source: SSPMicro based on information from the Secretariat of Mining Policy, companies and GFMS.

Schematic of the Non-Metalliferous Chain

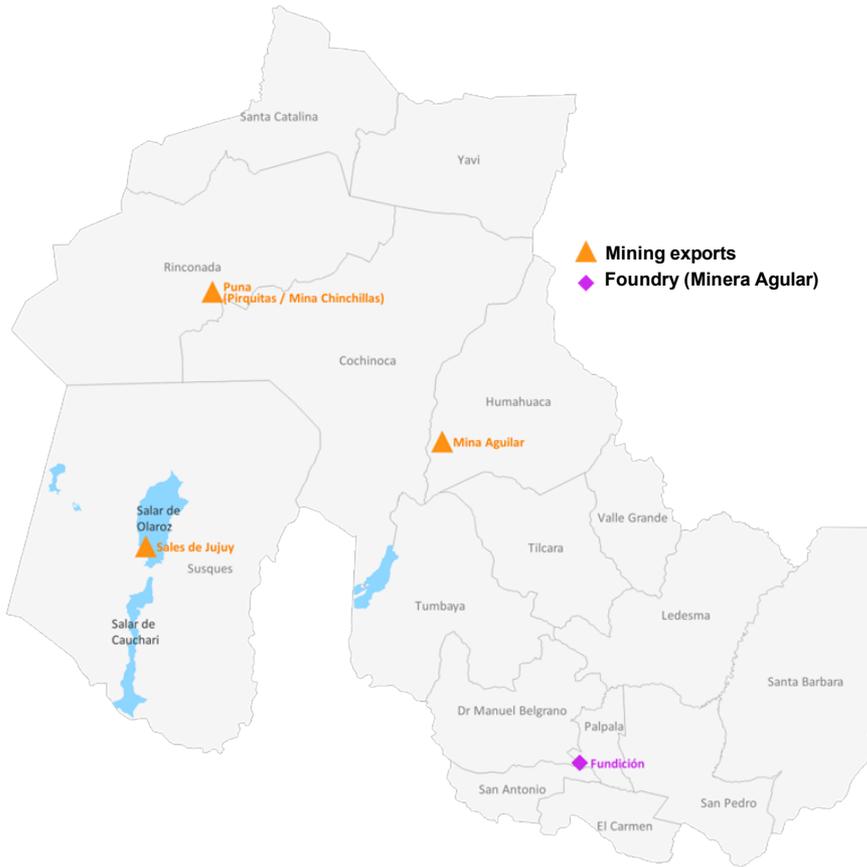
Suppliers of supplies, machinery and equipment. Mining services.



* The distribution structure in the different applications corresponds to the average of the world market for the year 2018 (USGS).

Source: SSPMicro based on COCHILCO, USGS and company information

Main mining projects in operation



Territorial Configuration

- As in any extractive activity, the location of mining – at least in its primary phase – depends on the availability of the natural resource. The mining potential of the western province includes polymetallic deposits of silver, lead, zinc, gold, tin; and the minerals available in the area of salt flats (lithium, potassium, sodium, borates, among others).
- The economic feasibility of exploitation depends on different factors, both supply and demand: extraction and financial costs, concentration (grade) of the ore, available technology and infrastructure, prices, etc.
- The first processing of the ore (beneficiation) is carried out in plants installed in the extraction area, due to the need to reduce the volume of the material transported. Other factors operate in the location of the following phases (availability of energy and labor, logistics and transportation, promotional incentives, production scales).
- The Puna Project (construction of the Chinchillas Mine to operate in facilities of the recently closed Pirquitas Mine) produces silver-lead and zinc concentrates in the Rinconada department, where the deposit is located. Shipments abroad are made through the ports of Antofagasta (Chile) and Buenos Aires.
- Minera Aguilar extracts lead, silver and zinc at the mine located in the department of Humahuaca. From the concentrate obtained in the deposit, lead and silver are refined in the Palpalá industrial park. Zinc – which until 2016 was processed in the country – is currently exported in the form of concentrate.
- In the Salar de Olaroz (Susques department) is located Sales de Jujuy, where lithium carbonate is produced and exported to the electric automotive industry. Another advanced lithium project is located in the same area: Cauchari-Olaroz, owned by Minera Exar.

Activity level

- Jujuy is the 6th province in terms of value of mining production (year 2017, at 1992 prices). Metalliferous mining represents 52% of that value, non-metalliferous 42% and application rocks 6%. Silver (which is extracted in association with other metals such as lead and zinc) and lithium (non-metalliferous) are the main resources exploited. Jujuy contributes 43% of the volume of lithium extracted in the country, 26% of silver and 100% of lead and zinc.
- Silver production grew significantly in 2010 due to the start of operations in Pirquitas. It was Argentina's main silver mine, until the end of its useful life in 2017. With the closing, the volume obtained fell (in 2018 it would be 64% below the record of 2016). Chinchillas is already under construction, which will process ore at the Pirquitas facilities and would allow provincial production levels to be recovered.
- In 2015, the commercial exploitation of lithium began, in the Olaroz project (Sales de Jujuy). In 2018, production would have remained stable and an increase in installed capacity is expected for the coming years.

Silver and Lithium Production
(tonnes and var. %)



Exports

- The main destination of large-scale mining production is the foreign market, where it is sent with a low level of processing.
- In 2018, minerals were exported for US\$ 305 million (61% of provincial foreign sales). The 10.3% YoY drop is due to the closure of Pirquitas. The entry into operation of projects explains the increases in 2010 (Pirquitas) and 2016 (Olaroz), while the record reached in 2012 is linked to the extraordinary level of world metal prices in that year.
- In 2018, the main minerals exported were lithium (48%), lead (22%), zinc (14%) and silver (13%).
- The main destinations were: China (24%), Japan (16%), Brazil (14%), the Netherlands (12%) and Korea (12%). Lithium carbonate is mainly sent to Asia, where the manufacturing plants for the manufacture of batteries for the electric automotive industry are located.

Mining exports
(million dollars and var. %)



Main agents

- Large-scale mining makes up a global value chain, led by important multinational firms specialized in the sector.
- Metals: Puna Operations is a *joint venture* between Canadian companies SSR Mining (owner of Mina Pirquitas) and Golden Arrow (Mina Chinchillas), while Minera Aguilar is owned by Glencore.
- Lithium: Sales de Jujuy arises from a partnership between Australia's Orocobre, Japan's Toyota and state-owned company JEMSE, which also participates in Minera Exar's lithium project under construction (in the hands of Canada's Lithium Americas and China's Ganfeng Lithium).

Employment

- In 2017, registered private employment dedicated to mining extraction was 1,856 jobs, which represented 3% of the provincial total. 74% corresponded to metalliferous mining.
- Although 116 jobs were lost in 2017 compared to the previous year (-5.9%), the trend was reversed in 2018. In the first 9 months of the year, employment in mining increased 21% YoY (well above the average provincial employment growth of 4%), raising the total number of workers to 2,218 (388 new positions).
- According to CENAM-17, in 2016, of the total number of employed people in all provincial mining, 86% were salaried (52 p.p. correspond to personnel affected by the production process); 8% contracted and temporary; and the remaining 6% are non-salaried.
- Mining is considered by the ILO to be a high-risk activity for the safety and health of workers.

Public policies

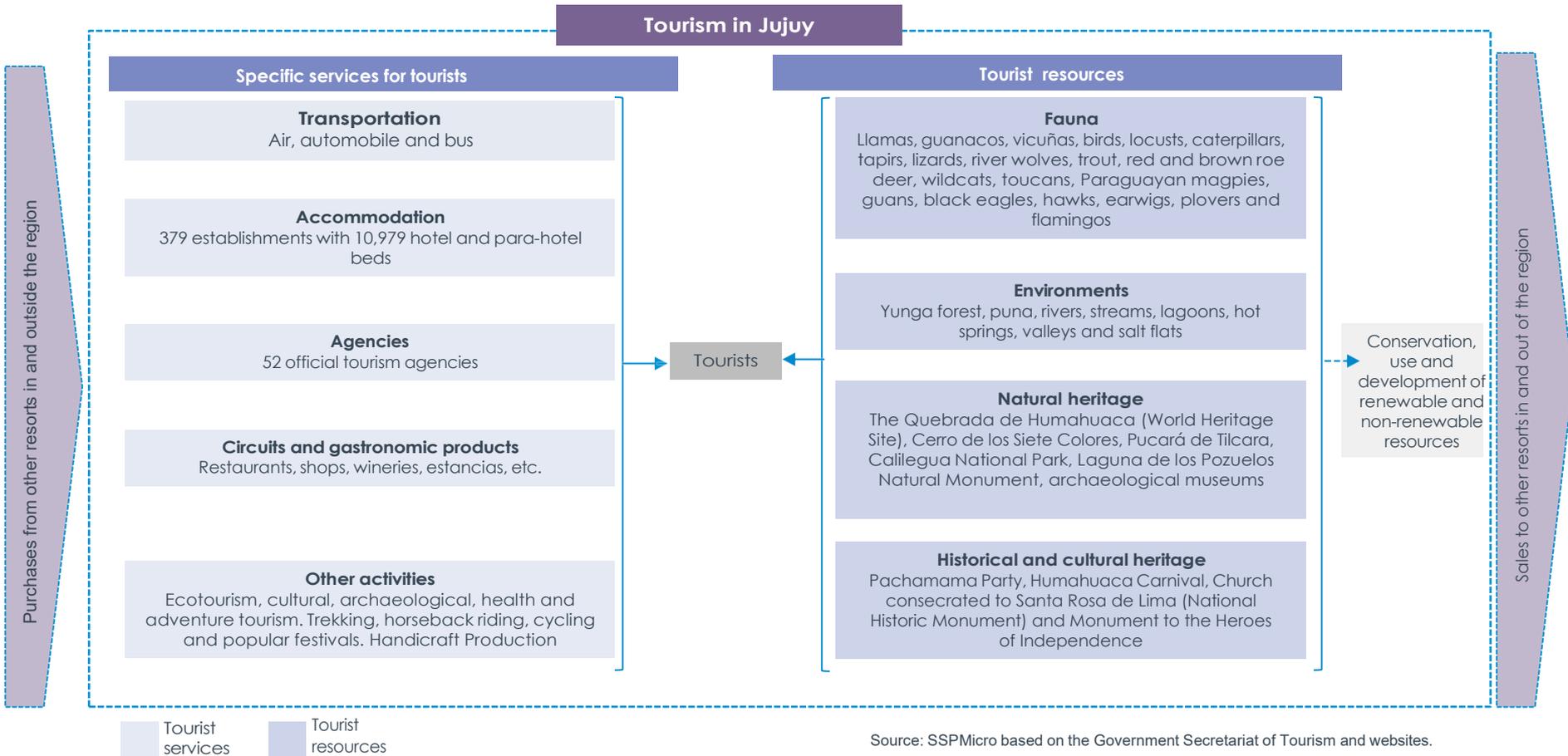
National

- Mining policy axis: Mining Code and Law No. 24.196/93 on Mining Investments. The free availability of resources and a special tax regime are established (fiscal stability for 30 years; double deduction of exploration expenses; accelerated amortization of capital investments; early refund of VAT Tax Credit for exploration expenses; exemption from Import Duties on capital goods, spare parts and inputs; provision for Environmental Conservation deductible from profits; Royalties of 3% on the value of the mine head).
- Restitution of withholdings until 12/31/2020 (12% with a cap of \$3 per dollar). Refunds: elimination of 2.5% of raw silver and 50% reduction of lithium (REI 1.5%).
- Discussion of a New Federal Mining Agreement, within the framework of the Council Federal Mining Agency (COFEMIN).
- Ministry of Production: Lithium Competitiveness Roundtable (launched in March 2019).
- Simplification of procedures: remote procedures platform, (<https://tramitesadistancia.gob.ar/tramitesadistancia/inicio-publico>).

Provincial

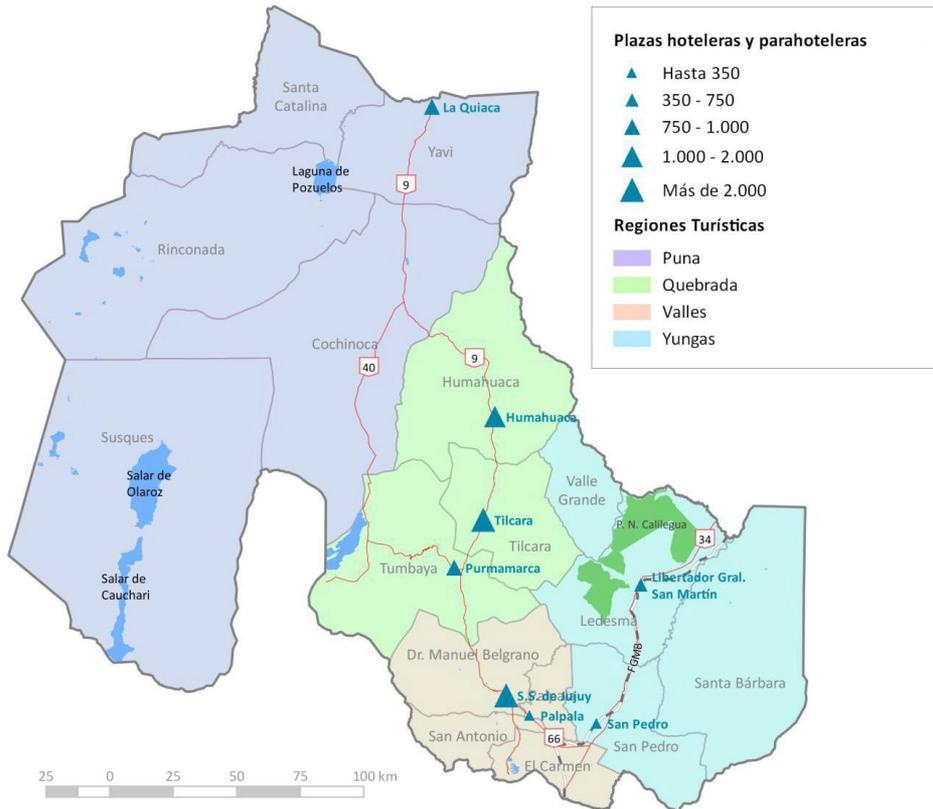
- Jujuy Energía y Minería Sociedad del Estado (JEMSE): participates in Sales de Jujuy and Minera Exar, with 8.5% of the shares.
- Declaration of lithium as a strategic natural resource (Decree 7592/11).
- Center for Research and Technological Development of Advanced Materials in Energy Accumulation (CIDMEJU): made up of the UNJU, CONICET and the provincial government, it is dedicated to R+D and technology transfer to obtain lithium.

Chain Schema



Source: SSPMicro based on the Government Secretariat of Tourism and websites.

Infrastructure in accommodation and ecoregions



Territorial Configuration

- Jujuy offers a varied tourist proposal in its four ecoregions: Yungas, Valleys, Puna and Quebrada.
- The Quebrada de Humahuaca is the main tourist attraction of the province. Declared a World Heritage Site by UNESCO, it is a World Cultural Landscape and an important provider of active tourism (ecotourism and adventure tourism). Among the most visited places are Purmamarca and the Cerro de los Siete Colores, Tilcara with the Pucará, and Humahuaca with the Serranía del Hornocal (hill of fourteen colors).
- Within the Yungas is the Calilegua National Park, a jungle ecosystem with an area of 76,306 hectares, where trekking and horseback riding activities are offered. The park occupies a quarter of the surface of the Ledesma department, giving a certain dynamism to the tourist activity of the town of Libertador Gral.
- In the Valles area, the mountains and lagoons offer the experience of ecotourism and natural tourism. Among the highlights are the Termas de Reyes and the Lagunas de Yala.
- Within the Puna, the resources constituted by the salt flats and salt flats are recognized. Salinas Grandes stands out, connected to Purmamarca by the Cuesta de Lipán, and the Laguna de Pozuelos Natural Monument, which is home to more than 100,000 shorebirds a year and preserves an important population of high Andean flamingos.

Note: the localities whose hotel beds represent more than 2% of the provincial total are presented. Year 2016. Source: SSPMicro based on the General Secretariat of Tourism and APN.

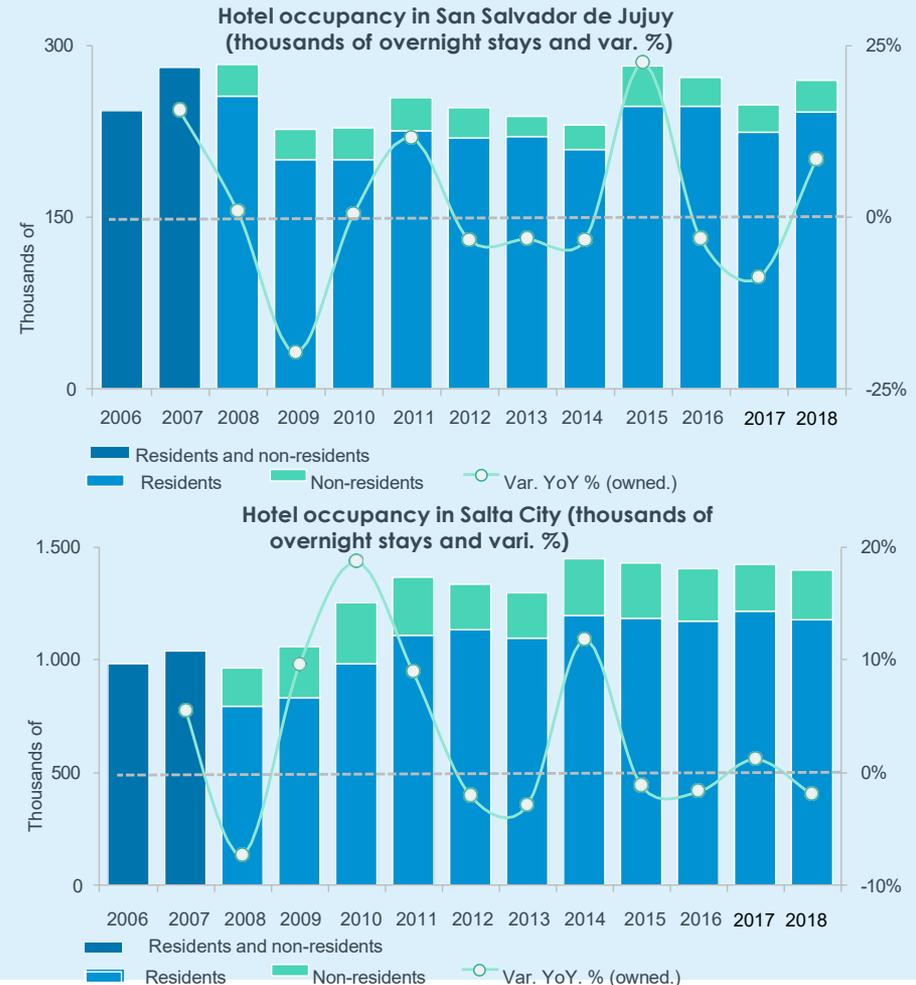
Activity level

- Jujuy is the 2nd province in accommodation infrastructure supply in the NOA Region measured in establishments (1.9% of the national total) and the 4th in places (1.5%). It is a destination of great attraction for resident and non-resident tourists, both for its natural resources and for its cultural heritage and the festivals and festivities linked to Pachamama and the Carnival celebrations.
- Although the main tourist towns are Purmamarca, Tilcara and Humahuaca; hotel occupancy statistics measure the provincial capital, where tourist services are offered to the Quebrada. Likewise, the capital of Salta is a great node of tourist movement (resident and foreign tourists) in the region. From Salta, tourists visit Jujuy and extend their stay in the Quebrada de Humahuaca. That is why the hotel occupancy statistics of both localities have been taken to account for a more general movement in the province.
- Despite the lower dynamism of overnight stays in San Salvador de Jujuy, overnight stays in the City of Salta show a strong growth in tourism in the region in the last ten years. The main component that explained this growth was the increase in domestic tourism. On average, 82% corresponds to tourism by residents and 18% to foreigners.

Exports

- Northern Argentina, mainly Salta and Jujuy, along with Patagonia Fantástica and the Iguazu Falls are part of the main points of interest for foreign tourists in the country. During 2018, San Salvador de Jujuy had 27,866 overnight stays by non-residents with a year-on-year growth of 16.7% (City of Salta 219 thousand, 6% y.o.y.).

Source: SSPMicro based on EOH, INDEC.



Tourist offer

- **Accommodation:** the accommodation infrastructure is around 60 hotel establishments, 299 para-hotels and 20 other groups; with a total of 10,979 places distributed in 34%, 65% and 1%, respectively.
- **Official tourism agencies:** 52 agencies are registered in the province, mostly located in San Salvador (69%). The province ranks 18th in number of travel agencies within the country's 24 jurisdictions, with only 0.9% of the total.
- **Activities promoted:** the groups of activities linked to the adventure tourism; cultural; nature and ecotourism; gastronomic tourism and that linked to the celebration of Pachamama and carnivals.
- **Transport:** the connection is through land transport (cars private and bus) and air. It has an international airport, Gobernador Horacio Guzmán, located in the provincial capital (33 km from the center).

Employment

- Employment in hotels, restaurants and travel agencies in Jujuy represents 0.6% of employment in the branch in the country as a whole and 2.8% of total formal employment in the private sector in the province.
- In 2017, an average of 1,720 jobs were registered, 65% restaurants, 31% accommodation and 4% travel agencies. The year-on-year growth (+4.2%) was mainly explained by the dynamics of restaurants.

Public policies

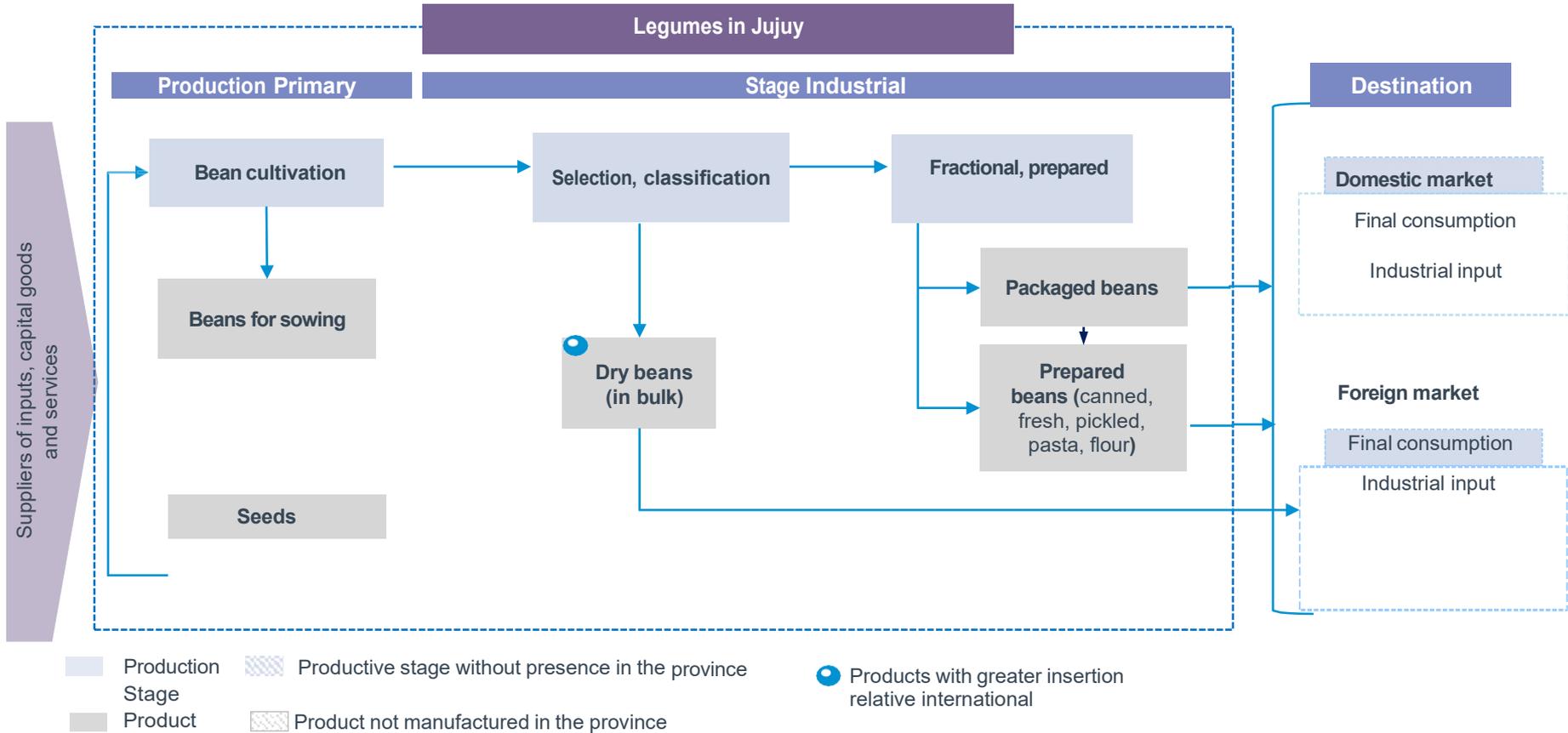
National

- **VAT refund (21%):** refund of the tax to tourists from abroad for accommodation services throughout the country to the extent that they are implemented through the use of some means of payment that involves the transfer of funds to the country from abroad (Decree 1043/2016).
- **Aircraft Revolution.** Management axes: growth of Airlines Argentina, more airlines and modernization of the country's airports and technology . Works in Jujuy: renovation of the passenger terminal with a new technical building that will function as an energy center for the terminal.
- **ViaJAR Platform (2018):** digital strategy for the promotion of tourism internal.
- **Tourism infrastructure.** Jujuy-La Quiaca tourist train, railway project. In a first stage, it joins the towns of Volcán, Tumbaya, Purmamarca, Maimará, Tilcara, Huacalera, Uquía and Humahuaca. Financing from the Government Secretariat of Tourism and the Government of Jujuy.

Provincial

- **Jujuy Assists and Reactivates Contingency Plan.** In charge of the Ministry of Economic Development and Production. Line of financing for entrepreneurs (new companies) and microentrepreneurs. Maximum credit \$1,500,000 with a grace period of 3 to 12 months, maximum 80% of the investment with a fixed annual rate of 12.5% for 3 years; 14.5% per annum fixed for 5 years or 17.5% per annum for amounts exceeding \$600,000.

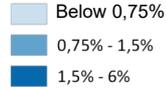
Chain Schema



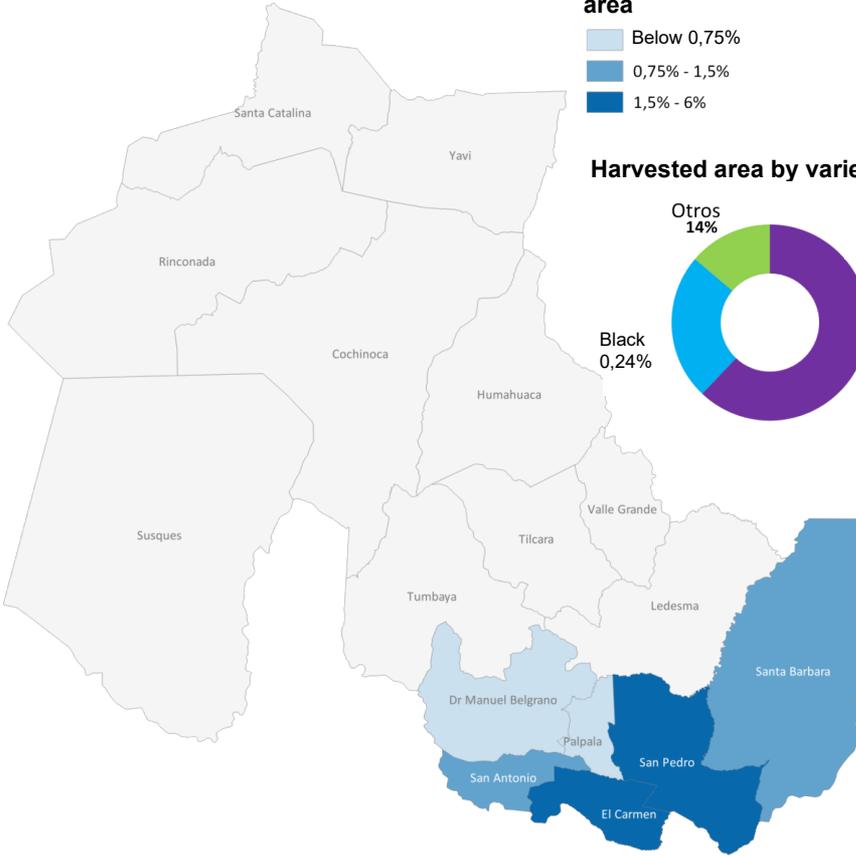
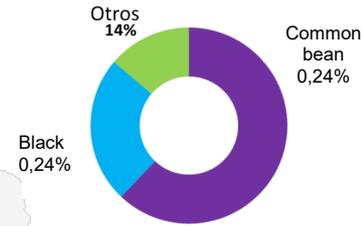
Source: SSPMicro.

Geographical Distribution of Production

Harvested area / Department area



Harvested area by variety



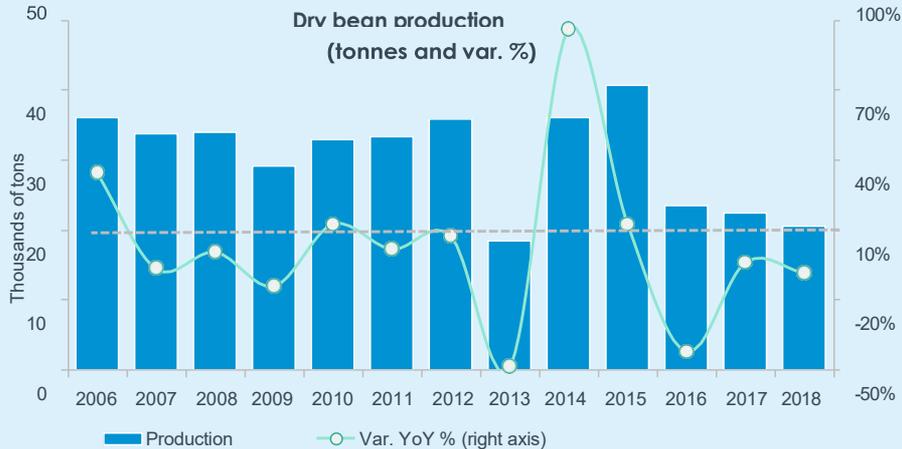
Territorial Configuration

- The bean is the most produced legume in the country, rooted in the NOA region. Jujuy participates with 4.4% of the national production, behind Salta and Santiago del Estero.
- Production is concentrated in the southeast of the province, giving territorial continuity to the activity that is deployed in the east of the province of Salta. The cultivated area is relatively stable, around 29 thousand hectares. The grain is sown in January and harvested in late March-April.
- The bean spreads over cleared soils in flat areas, especially in temperate valleys. The climate of the area allows you to take advantage of the rains in the stages of crop development and to harvest in times when they are lacking.
- The department of San Pedro is the most important in the production of Dry Beans at the provincial level, followed by Santa Bárbara and El Carmen. In the 2018/17 campaign, these three districts accounted for 92% of the provincial production.

Source: SSPMicro based on the Ministry of Agroindustry.

Activity level

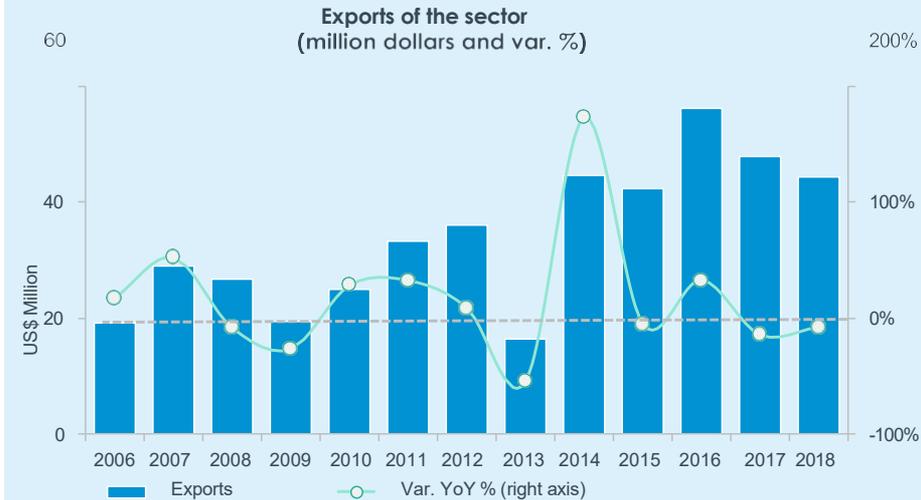
- It is a summer crop that competes in soil use with soybeans and its main destination is export. Two types of beans are produced: white or bean and black. It has a low level of processing, which includes cleaning, sorting, polishing and packaging. Only a very low percentage is destined for stages of greater elaboration (jars, cans, pickling, pasta and flour) aimed at the domestic market.
- Like all agricultural production, it depends on climatic conditions. The fall in the crop in 2013 (49%) is linked to a severe drought that affected the producing areas. After the recovery in 2014 and 2015, production was considerably reduced in the last three seasons for which there is available data.



Source: SSPMicro based on the Ministry of Agroindustry.

Exports

- The foreign market is the main destination of production.
- In the period 2006-2018, the average exported reached US\$ 32.6 million. The legumes exported by the province reached their historical maximum in 2016 with US\$ 56 million.
- In 2018, foreign sales were recorded for approximately US\$ 44 million, which meant a contraction of 7.6% YoY. 99% corresponded to beans (40.6% black, 31% white and 17.5% red). The rest were chickpea exports.
- The legume value chain accounted for 9% of provincial exports. The main destinations were Venezuela (18%), Brazil (17%), Algeria (9%), Spain (9%) and Italy (8%).



Source: SSPMicro based on INDEC.

Main agents

- In the departments of San Pedro and Santa Barbara, beans are made as a complementary activity to the production of sugar cane. There are 2 strata of producers: a) small producers of 100 to 500 ha whose main activity is sugar cane and they plant grains as a secondary activity; b) large with more than 3,000 ha of grains characterized by the use of state-of-the-art technology.
- In the department of El Carmen there are 2 strata of producers: a) subsistence with less than 100 ha that almost do not use technology; b) medium-sized farms of up to 500 hectares whose main activity is tobacco and beans are complementary.

Employment

- Horticulture is a labour-intensive activity, with a significant number of temporary workers, especially at harvest time. Working conditions in the chain are characterized by significant informality and precariousness in the hiring of personnel.
- According to MAGyP estimates, the bean chain employs 0.12 people per hectare planted, in all links of the chain. Using this criterion, the jobs generated in the harvest season (5 to 6 months) would be 3,504. In annual terms, equivalent jobs would be in a range between 1,460 and 1,752.

Public policies

National

- **National Legume Roundtable:** In June 2018, the new sectoral competitiveness roundtable was launched with the aim of implementing a system that will generate greater security and financing for exports to encourage sectoral potential and strengthen competitiveness.
- **Export duties:** Decree 793/2018 sets until 12/31/2020 an export duty of 12% with a limit of \$3 and \$4 for each dollar exported for industrial and primary products, respectively. It modifies Decree 133/2015, where the rates had been set at 0% for all products in the chain.
- **Refunds:** by Decree 767/2018 refunds were reduced to a level between 0.5% and 3.25%, according to a differential scheme by product.



3. Other sectors



Activity level

- The development of the chain in the province was linked to the availability of iron ore in the mountain range of the Serranías del Zapla, which led to the creation of the first steel center in Argentina: Altos Hornos Zapla, founded in 1945, then dependent on Fabricaciones Militares.
- The company was privatized in the 90s. Currently, iron is smelted in the province and common steel and special (non-flat) steels are manufactured. Common steel is mainly intended for construction (construction iron and U-profiles) and special steels are closely linked to the demand needs of the automotive industry and for the manufacture of capital goods.
- It is estimated that the province accounts for 2% of steel production nationwide and 4% of non-flat hot-rolled.
- The activity is carried out in the town of Palpalá, 14 km south of the provincial capital, where the labor force to work in the mines and in the furnaces was located. In this sense, this chain has a strong link with the population in terms of employment and development.

Main agents

- Aceros Zapla was created in 1992 as a result of the privatization of Altos Hornos Zapla. It is a vertically integrated company, currently owned by the Taselli Group, with national capital.
- It occupies a 114-hectare site where the steelmaking, rolling, forging and auxiliary facilities are installed.

Employment

- In 2017, 587 private jobs were registered in the manufacture of base metals. Compared to the peak reached in 2015, 154 jobs were lost.
- In March 2019, Zapla steels requested the Crisis Preventive Procedure due to the drop in production (it is operating at 30% of its capacity).

Public policies

National

- **Tax incentives and tax benefits** linked to Law 25,924 on the Promotion of Investments in Capital Goods and Infrastructure Works, and Law 22,317, Tax Credit Regime for Industrial Establishments that have organized technical education courses.
- **Tariff policy:** it has exceptions to the Common External Tariff (CET) of Mercosur for ferroalloys, certain flat rolled and certain non-flat rolled metals; and history of anti-dumping measures that mainly benefited Siderar, Acindar, Aceros Zapla and Gerdau.



Activity level

- Jujuy concentrates 8% of the national citrus production (2017). It has 8.3 thousand cultivated hectares with a production of 259 thousand tons. 63% of the production corresponds to oranges (162 thousand tons), and the remaining 37% is divided into lemons (47 thousand tons), mandarins (35 thousand tons) and grapefruit (15 thousand tons).
- Between 2006 and 2017, although the planted area remained stable, production grew by 65.1%, reaching the maximum in the last campaign. The growth of all citrus varieties stands out, mainly oranges and mandarins (+82.9% and +89.2%, respectively).
- Production is located in the departments of San Antonio, San Pedro, Santa Bárbara, Ledesma and El Carmen (region of Temperate and Subtropical Valleys).
- A large part of the provincial production is sent to industry. The rest, mainly, is destined to the packaging of fresh fruit for the domestic market. Likewise, a high percentage of fresh lemons are exported.

Exports

- In 2018, 24 thousand tons of citrus fruits were exported for a value of US\$ 45 million, which represented 9% of the province's foreign sales.
- The main destinations were: Ireland (23%), the Netherlands (20%), the United States (20%) and Spain (10%).

Main agents

- There are 240 producers in the province, among which small producers who produce citrus and vegetables predominate. More than 70% own establishments of less than 20 hectares. A single establishment exceeds 1900 hectares.
- Large producers are generally integrated and have a diversified production of fruits, vegetables and sugar cane.
- Industrialization in the province is scarce, there is an establishment of concentrated juices and essential oils.

Employment

- Citrus farming generates a direct and indirect workforce of approximately 2,000 jobs.

Public policies

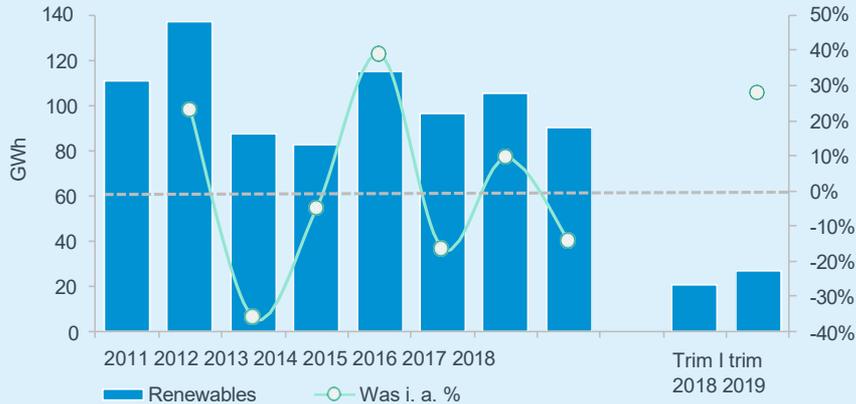
National

- **Export duties:** Decree 793/2018 sets until 12/31/2020 an export duty rate of 12% with a limit of \$3 and \$4 for each dollar exported for industrial and primary products, respectively. It modifies Decree 133/2015, where the rates had been set at 0% for all products in the chain.
- **Refunds:** by Decree 767/2018, refunds were reduced to a level between 1% and 3.25% according to the differential scheme by product.
- **Non-taxable minimum for employer contributions:** it was raised through Decree 128/2019.

Activity level

- In 2018, Jujuy contributed 2.7% of the national total of renewable energy generation linked to SADI (includes Hydroelectric <50 MW of power, Wind, Solar, Biomass, Biodiesel and Biogas), ranking 11th.
- So far, only the hydraulic fountain is used. In 2018, 91 GWh (-14% YoY) were generated in the two small hydroelectric projects (PAH) in operation: Las Maderas (78%) and Río Reyes (22%). Problems at the Catamontaña compensatory dam have hindered the full use of the PAH Las Maderas.

Energy generated from renewable sources (GWh and var. %)



Source: SSPMicro based on CAMMESA.

- This year, the Caucharí Photovoltaic Solar Park, included in the RenovAr Program, will begin operating through 3 projects (Caucharí 1, 2 and 3), with a total power of 300 MW (7% of what was awarded by the program throughout the country). It represents an expansion of 700% of the provincial installed capacity. Operating at maximum capacity, it would generate 644 GWh per year.
- According to the Provincial Index of Renewable Attractiveness (IPAR), prepared by the FCE/UBA, the Undersecretariat of Renewable Energies and Energy Efficiency (SSERyEE) and the Circle of Environmental Policies, Jujuy is the 10th jurisdiction in the country in terms of the degree of development of renewable energies and its attractiveness for investment (March 2019).

Main agents

- Jujuy Energía y Minería SE (JEMSE): is a provincial state company specialized in the mining, hydrocarbons and renewable energy sectors. It is the owner of the Caucharí 1, 2 and 3 projects, awarded through RenovAr (Round 1) and which have financing from the Export-Import Bank of China and through the placement of an international bond by the provincial government. The design and construction engineering is in charge of POWERCHINA.
- Empresa Jujeña de Sistemas Energéticos Dispersos SA (EJSED SA): operates small hydroelectric plants.



Employment

- According to the Direct Employment Indicator for Renewable Energies in Argentina (IEDER), prepared by the SSERyEE, employment shows high rates of formality, as it is a capital-intensive sector.
- Direct labor requirements vary depending on the technology and phase of the project. For photovoltaic solar parks, the IEDER estimates a coefficient of 2.3 jobs for each MW of installed power, for the first year of construction and 2.8 for the second, while operation and maintenance (average useful life of 20 years) demands 0.2 jobs/MW. The operation of the PAHs requires 2.5 jobs/MW.
- According to these technical relationships, the current electricity generation based on PAH would demand around 93 jobs; in addition to the 765 positions (average, for 2 years) for the construction of the Caucharí solar park, which would then operate with 60 people.

Public policies

National

- Law No. 27.191/2015 - National Promotion Regime for the Use of Renewable Energy Sources for the Production of Electric Energy: promotes the diversification of the energy matrix. Tax incentives. Public Trust Fund for the Development of Renewable Energies (FODER): guarantees of payment for energy and project financing.
- Law No. 27,424/2017 - Regime for the Promotion of Distributed Generation of Renewable Energy Integrated into the Public Electricity Grid: establishes the conditions for self-consumption and the eventual injection of surpluses into the distribution network. Promotional benefits. Trust Fund for Distributed Generation of Renewable Energies (FODIS).
- RenovAr Program (2016): open call that includes benefits fiscal and project financing mechanisms.
- Renewable Energy Term Market (MATER) - Res. No. 281/2017: implementation of a dispatch priority management system.
- Renewable Energy in Dispersed Markets Project (PERMER): rural electrification from renewable sources (mainly photovoltaic).

Provincial

- Creation of the Jujuy Institute of Renewable Energies and Energy Efficiency (IJEREE) - Law No. 6.026/2017: R+D and technology transfer.

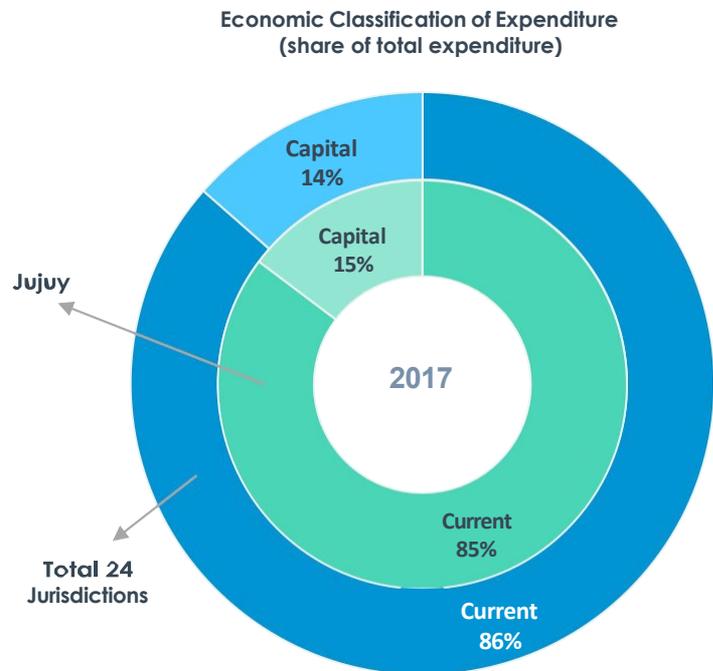


4. Annex



Expenditure by economic classification and object (millions of current pesos)

Concept	2006		2017	
	Mill. \$	Part. %	Mill. \$	Part. %
II. CURRENT EXPENDITURE	1.403	83,1	31.710	85,3
II.1 Consumption Expenditure	947	56,1	21.455	57,7
II.1.1 Personal	849	50,3	19.621	52,8
II.1.2 Consumer Goods	42	2,5	702	1,9
II.1.3 Services	55	3,3	1.132	3,0
II.2 Property Income	56	3,3	940	2,5
II.3 Social Security Benefits	0	0,0	0	0,0
II.4 Current Transfers	401	23,7	9.315	25,1
II.4.1 To the private sector	161	9,5	4.427	11,9
II.4.2 To the Public Sector	240	14,2	4.888	13,1
II.4.3 To the External Sector	0	0,0	0	0,0
V. CAPITAL EXPENDITURES	285	16,9	5.470	14,7
V.1 Real Direct Investment	258	15,3	3.105	8,4
V.2 Capital Transfers	14	0,8	277	0,7
V.2.1 To the private sector	1	0,1	56	0,1
V.2.2 To the Public Sector	13	0,8	221	0,6
V.2.3 To the External Sector	0	0,0	0	0,0
V.3 Financial Investment	13	0,8	2.088	5,6
TOTAL EXPENSES	1.688	100	37.180	100



Back

Source: SSPMicro based on the National Directorate of Provincial Affairs, Ministry of Finance.



5. Places of interest



Tobacco

- Ministry of Production and Labor of the Nation. Government Secretariat of Agribusiness: www.argentina.gob.ar/agroindustria
- Jujuy Tobacco Chamber: www.tabacojujuy.com.ar
- Single Union of Tobacco Employees of the Argentine Republic: <http://www.suetra-tabacos.com.ar/>
- Foundation of Development Social of the Tobacco Sector <http://www.fudesta.org.ar/>

Sugar

- Ministry of Production and Labor of the Nation. Government Secretariat of Agribusiness: www.argentina.gob.ar/agroindustria
- Argentine Sugar Center: www.centroazucarero.com.ar
- Ledesma: www.ledesma.com.ar
- Unión Cañeros Independientes de Jujuy y Salta (UCIJS): www.ucijs.org.ar
- Chamber of Alcohols: www.camaradealcoholes.org.ar
- Federation of the industries of Sugar and Alcohol www.azucaryalcohol.com.ar
- Chacra Experimental Santa Rosa: www.chacraexperimental.org

Mining

- CIMA (Mining Information Center of Argentina): <http://cima.minem.gob.ar/>
- Ministry of Production and Work of the Nation <https://www.argentina.gob.ar/produccion>
- Ministry of Education, Culture, Science and Technology. <https://www.argentina.gob.ar/ciencia>
- Secretariat of Mining and Hydrocarbons of Jujuy: <http://www.mineriajujuy.gob.ar/site/index.php>
- Remote Procedures Platform: (<https://tramitesadistancia.gob.ar/tramitesadistancia/inicio-publico>).
- INDEC: <https://www.indec.gov.ar/>
- SEGEMAR: <http://www.segemar.gov.ar/>
- ZIDME: <http://secyt.jujuy.gob.ar/cidmeju/>
- COCHILCO: <https://www.cochilco.cl/Paginas/Inicio.aspx>
- USGS: <https://www.usgs.gov/>
- The Silver Institute: <https://www.silverinstitute.org/>
- CAEM: <http://www.caem.com.ar/>
- SSR: <http://www.ssrmining.com/>
- Salts of Jujuy: <https://salesdejujuy.com/>
- Exar Mining: <https://www.mineraexar.com.ar/>



Tourism

- General Secretariat of Tourism: <https://www.argentina.gob.ar/turismo>
- INDEC: <https://www.indec.gov.ar/>
- Administration of National Parks:
<https://www.parquesnacionales.gob.ar/>
- Argentina Travel: <http://www.argentina.travel/>
- Regulatory Body of the National Airport System (ORSNA):
<https://www.orsna.gob.ar/>
- Ministry of Tourism of Jujuy: <http://turismo.jujuy.gob.ar/>
- Ministry of Development, Economy and Production:
<http://produccion.jujuy.gob.ar/>
- Argentine Chamber of Tourism: <http://www.camaradeturismo.org.ar>
- Union of Tourism Workers. Hoteliers and Gastronomy of the Argentine Republic: <http://www.uthgra.org.ar>

Legumes

- Ministry of Production and Labor of the Nation. Government Secretariat of Agribusiness: www.argentina.gob.ar/agroindustria
- Chamber of Legumes of the Argentine Republic: www.clera.com.ar
- INDEC: www.indec.gov.ar

Renewable Energies

- Government Secretariat of Energy. <https://www.argentina.gob.ar/energia>
- Undersecretariat of Energies Renewables and Efficiency Energetic.
<https://www.argentina.gob.ar/energia/energia-electrica/renovables>
- Ministry of Infrastructure, Public Services, Land and Housing of the Province of Jujuy. <http://infraestructura.jujuy.gob.ar/>
- Jujuy Energía y Minería SE (JEMSE). <http://jemse.gob.ar/>
- Jujuy Company of Dispersed Energy Systems SA (EJSED SA).
<https://www.ejesa.com.ar/memoriasybalances/ejsedsa.html>
- Compañía Administradora del Mercado Eléctrico Mayorista SA (CAMMESA). <https://despachorenovables.cammesa.com/>
- *International Renewable Energy Agency (IRENA)*. <https://www.irena.org/>



Other recommended sites

- Association of Automotive Dealers of the Argentine Republic.
EVENT: <http://www.acara.org.ar/>
- Association of Manufacturers of Cement Portland (AFCP):
<https://www.afcp.org.ar/>
- Central Bank of the Argentine Republic. BCRA: <http://www.bcra.gov.ar/>
- Commission Cost-effective for Latin America and The Caribbean (ECLAC):
<https://www.cepal.org>
- Wholesale Electricity Market Administrator Company
(CMMESA): <http://portalweb.cammesa.com/>
- National Gas Regulatory Entity (ENARGAS): <https://www.enargas.gob.ar/>
- National Institute of Statistics and Censuses of the Argentine Republic
(INDEC): <https://www.indec.gov.ar/>
- Ministry of Finance of the Nation. National Directorate of Provincial Affairs.
(DNAP): <http://www2.mecon.gov.ar/hacienda/dncfp/> and
<http://www2.mecon.gov.ar/hacienda/dinrep/>
- Ministry of Finance of the Nation. Government Secretariat of Energy.
<https://www.argentina.gob.ar/energia>
- Ministry of Production and Labor of the Nation. Government Secretariat of
Labor and Employment. Observatory of Employment and Business
Dynamics. WEE: <http://www.trabajo.gob.ar/estadisticas/oede/>
- Ministry of Finance of the Province of Jujuy: <http://hacienda.jujuy.gob.ar/>



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