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Japan's Growing Economic Ties With Latin America

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Japan's Growing Economic Ties with Latin America

SUMMARY

Japan's economic presence in Latin America is expanding rapidly as the Japanese move to diversify their overseas markets and develop outlets for investment capital. The Japanese have already established a small foothold in many Latin American markets, and sales to the region should reach US $2 billion this year, or roughly double the 1970 level. [redacted] 25X6

25X6

To help boost sales and assure a stable supply of raw materials from the region, Japan is providing relatively large amounts of capital to Latin American countries. Since the start of 1972, private and government sources have made available about $2 billion in medium-term and long-term loans to finance purchases of Japanese goods. [redacted] 25X6

25X6

Much of Japan's economic interest in Latin America is concentrated in Brazil and Mexico. Most investments made to date are in Brazil, and one-third of Japan's trade with Latin America involves Brazil and Mexico. The Japanese, however, also are expanding their trade and economic ties in other countries such as Peru, Colombia, Argentina, and even Cuba. By and large, the Latin American countries have encouraged Japan to expand its economic involvement in the area, in some instances viewing it as a way to reduce their still very heavy dependence on the United States.

DISCUSSION

Japan's Presence in Latin America

1. Japan's economic position in Latin America is changing rapidly. During most of the period after World War II, involvement in the region was negligible, largely because Japanese firms were concentrating on

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boosting sales to other markets while viewing Latin America primarily as a source of raw materials. By the mid-1960s, Japanese sales to Latin America amounted to only about $400 million[1] annually, while imports totaled about $700 million. Investment in the region was practically non-existent.

2. Since the mid-1960s, trade and investment have expanded sharply. Two-way trade nearly tripled by 1972 to about $3 billion as Japanese firms moved aggressively to exploit marketing opportunities in the region. For many Latin American countries, Japan is now the second largest foreign supplier after the United States. Japan has also emerged as an important supplier of capital to the region. By 1970, Tokyo had issued approvals on new investments in Latin America totaling $500 million, and by early 1973 the cumulative level of approvals reached nearly $1 billion. Although still dwarfed by the US investment stake, Japanese investment in the region's mining and manufacturing sectors has become considerable within the past several years.

3. To encourage Japanese investment in Latin America, as well as in other less developed regions, Tokyo has established a special loan fund to help cover investment risks. The government also has expanded its small aid program to the region and has sent special trade missions to help develop new sales opportunities. Most Latin American countries have encouraged Japan's growing interest in the region, viewing it as a way to reduce their relative dependence on the United States. Since the beginning of 1972, at least a dozen Latin American economic missions have visited Japan.

Market Penetration

4. Japan's sales effort in Latin America has been increasingly successful. During 1966-70, exports to the region increased an average of 20% annually, and subsequently the pace accelerated to an average of about 25%. These gains have about doubled Japan's share of the market since 1965, to 9% last year. Sales reached $1.5 billion in 1972 – exceeded only by those of the United States and West Germany. Sales this year are expected to approach $2 billion.

5. Japan has concentrated its marketing effort on a few key countries, notably Brazil, Venezuela, and Mexico (see Table 1). These countries' programs to develop such basic industries as iron and steel and petrochemicals have opened up major new marketing opportunities. (For the composition of Japanese exports, see Table 2.) Sales to Brazil -- by far the largest market -- more than doubled between 1970 and 1972,

1. All trade data in this publication exclude ship exports to Panama under flag of convenience registration.

Table 1

Japanese Exports to Latin America, by Country

	1965	1970	1972
			Million US $
Total	**420.0**	**1,039.3**	**1,543.6**
Brazil	26.6	166.7	395.3
Venezuela	56.4	122.6	183.4
Mexico	40.6	93.9	150.7
Argentina	44.2	95.8	125.8
Colombia	12.8	56.8	71.7
Peru	47.6	52.9	70.8
Cuba	3.5	39.2	50.7
Dominican Republic	5.0	33.3	45.2
Ecuador	8.9	30.5	37.6
Chile	25.8	31.4	32.5
El Salvador	16.1	22.4	30.5
Guatemala	13.8	28.6	25.6
Nicaragua	11.1	11.7	18.3
Other	107.6	253.5	305.5

Table 2

Japanese Exports to Latin America, by Commodity Group

	1965	1970	1972
			Million US $
Total	**420.0**	**1,039.3**	**1,543.6**
Transport equipment	51.6	147.7	212.7
Of which:			
Ships	19.6	51.4	40.9
Motor vehicles	19.2	67.5	159.3
Machinery	90.9	292.1	492.0
Iron and steel	99.1	261.0	330.5
Textiles and products	82.9	108.1	114.7
Chemicals and pharmaceuticals	18.4	63.0	95.6
Precision instruments	10.5	40.1	68.9
Other	66.6	127.3	229.2

reaching about $395 million. During the same period, sales to Mexico and Venezuela jumped more than 50% to about $335 million. Substantial export gains have been made in other markets, but in most instances sales still amount to less than $50 million a year.

6. Japan has succeeded by offering competitively priced, high-quality products on good credit terms. For example, supply contracts for part of Mexico's $550 million Las Truchas steel complex, as well as for electric power generating units, were won on the basis of lowest cost. In making its bids for the steel project, Japan also offered a sizable Export-Import Bank loan. In addition to government financial support, funds are available from Japanese commercial banks that work closely with industrial firms and trading companies to help win supply contracts in the region. Commercial bank loans to finance development projects often restrict the use of funds to purchases from Japan. These projects are significant not only because of their initial size but also because they give Japan a vantage point in bidding for service and plant expansion contracts.

7. Japan has been particularly successful in winning supply contracts in Brazil. Contracts amounting to nearly $500 million have been awarded in the past year or so. Most of these contracts involve supplying machinery and equipment for Brazil's expanding steel industry or for transport facilities (see Table 3). Because the Japanese have or plan a substantial equity investment in many Brazilian industries, they have a special advantage over other potential suppliers when bidding on contracts. In boosting sales to Brazil and other countries in the region, the Japanese also benefit from their role as major buyers of raw materials. They frequently finance development of these resources, and the funds are usually linked to purchases of Japanese equipment.

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9. Demand for Japanese products remains strong even though their dollar prices went up sharply following currency realignments in 1971 and

Table 3

Selected Commercial Latin American Contracts Won by Japanese Firms 1972-73

Brazil:	$100 million in sales of railroad equipment and steel for Brazil's railroad expansion phase of its export corridors program. Financing covered by a $200 million Japanese commercial bank loan.
	$75 million order for two large tankers. Payment on delivery.
	$70 million order for coke oven facilities and a blast furnance (capacity of 8,000 tons per day) for the state-owned steel firm. Financing by a Japanese Export-Import Bank loan.
	$56 million in equipment to expand harbor facilities at three Brazilian ports. Financing by a Japanese bank loan and suppliers' credits.
	$50 million order for coke oven facilities and a blast furnace (capacity of 6,000 tons per day) for a joint Japanese-Brazilian steel venture. Financing by a Japanese Export-Import Bank loan.
	$34 million in power generating equipment. Financing by suppliers' credits.
	$32 million in machinery and equipment to construct four industrial plants. Financing by suppliers' credits.
	$5 million order for exhaust gas disposal facilities for a steel mill. Financing by a Japanese Export-Import Bank loan.
Mexico:	$20 million in coke oven facilities to be supplied and installed by Japan at the Las Truchas integrated steel complex. Financing by a Japanese Export-Import Bank loan.
	$16 million order for generating turbines for Mexico's first nuclear power plant at Laguna Verde.

Table 3

Selected Commercial Latin American Contracts Won by Japanese Firms 1972-73 (Continued)

Peru:	$31 million construction and supply contracts for an electrolytic copper refinery. Financing by a long-term suppliers' credit.
	$19 million construction and supply contracts for a catalytic cracking plant. Partly financed by a suppliers' credit.
Ecuador:	$40 million contract to supply and construct an oil refinery. Financing by a long-term suppliers' credit for 90% of cost (10% downpayment).
Argentina:	$23 million supply and construction contracts for a large iron ore processing and concentrating plant.
	Supply contract for four 110,000-kilowatt (kw) hydroelectric generating units (price not known).
Current bidding:	
Mexico:	A continuous casting plant for the Las Truchas steel complex. Japan's low bid reportedly is about $7 million, some $1 million less than the next lowest bid from a West German firm.
Argentina/ Uruguay:	Seven Japanese firms are bidding to supply a large hydroelectric power plant that will have an installed capacity of 1.6 million kw.
Guatemala:	Construction and supply contracts for a new Pacific port worth about $40 million. Japan reportedly is willing to provide an official loan at concessionary terms if Japanese firms win the contracts.

1973. Dollar prices of Japanese steel products sold to Latin America in mid-1972, for example, were almost 30% above the 1971 level. Nonetheless, the tonnage of rolled steel exports to the region rose nearly 40% during the first six months of 1973, compared with the same 1972 period, and Japan has already been approached by Brazil to supply more than 1 million tons of steel in 1974. Sharp price increases also have been registered for Japanese motor vehicles as well as machinery and equipment, but sales remain strong.

10. One reason for Japan's continued strong performance is that most West European currencies have appreciated against the dollar even faster than the yen. As a result, Japan's competitive position relative to European suppliers has improved rather than weakened. [redacted] 25X6

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Buying Raw Materials

11. Japan's imports from Latin America consist almost entirely of unprocessed minerals and agricultural commodities. Most of Latin America's cotton exports and a large share of the region's production of minerals go to Japan. Japan buys about 20% of its iron ore, 15% of its non-ferrous ores, and one-half of its zinc ore from Latin America. Japan is also a significant market for Latin American sugar, corn, and coffee (see Table 4).

12. Purchases are heavily concentrated in a few countries. Brazil and Mexico account for about one-third of imports from the region, and Peru, Chile, and Cuba an additional one-third (see Table 5). Overall purchases amounted to $1.4 billion in 1972, representing about 6% of total Latin American sales abroad. Purchases grew rapidly between 1965 and 1970, but declined in 1971 when the Japanese economy slowed, and rose only slightly last year because of sluggish demand for cotton and metallic ores. Nonetheless, for several Latin American countries, the Japanese market remains second only to the US market, although in most instances a distant second.

13. To ensure long-term supplies of key primary products, the Japanese are stepping up their buying in Latin America. They have already signed contracts with Brazil, Chile, and Peru calling for the delivery of some 100 million tons of iron ore through 1980, and additional contracts can

Table 4

Japanese Imports from Latin America, by Co nmodity Group

Million US $

	1965	1970	1972
Total	**706.8**	**1,368.5**	**1,412.6**
Iron ore and concentrates	178.6	275.0	263.0
Refined copper	7.8	93.7	66.9
Copper ore and concentrates	25.9	58.1	63.3
Zinc ore	27.3	34.3	62.0
Raw cotton	223.7	208.2	254.9
Sugar	30.0	132.0	199.7
Bananas	5.0	99.7	72.9
Corn and sorghum (Kaoliang)	14.7	118.4	47.1
Coffee beans	8.1	39.1	37.0
Salt	9.3	19.8	26.0
Other	176.4	290.2	319.8

Table 5

Japanese Imports from Latin America, by Country

Million US $

	1965	1970	1972
Total	**706.8**	**1,[illegible]68.5**	**1,412.6**
Brazil	49.6	[illegible]17.9	249.4
Mexico	144.8	51.2	201.8
Peru	111.1	[illegible]10.4	185.5
Chile	131.6	[illegible]12.4	180.0
Cuba	29.2	10.7	145.4
Argentina	47.9	53.8	78.2
Ecuador	6.2	84.7	71.6
Nicaragua	54.5	27.6	51.1
Colombia	4.4	26.7	41.0
El Salvador	33.8	28.1	40.9
Dominican Republic	0.2	6.8	35.8
Guatemala	24.1	22.4	34.4
Venezuela	29.7	22.8	29.7
Other	39.7	93.0	67.8

be expected. They are also setting up joint ventures with Latin American governments to explore and develop copper, lead, chromium, and bauxite resources with an eye toward shipping the output to Japan. Japanese interests recently purchases the world's largest industrial salt producer -- a US-owned firm in Mexico -- to ensure adequate supplies at home.

14. Japan is especially interested in Latin America's agricultural products and energy resources. Brazil is viewed as a potentially large supplier of soybeans; shipments to Japan are already reaching significant quantities. The Japanese also hope to increase purchases of wheat, corn, and beef from the region. They are offering large amounts of loan capital to Peru that would be repaid in crude oil, and several Japanese firms want to explore and develop oil deposits in Ecuador and Colombia as they already are doing in Peru. Japan is also seeking liquefied natural gas supplies and in recent discussions with Venezuela offered to take all the gas that could be produced.

Japanese Capital in Latin America

15. Substantial amounts of Japanese capital are beginning to enter Latin America. Equity investment was only about $250 million before 1972 but now totals at least $600 million because of recent large investments in extractive and manufacturing industries. The Japanese also are providing large amounts of loan capital. Since the start of 1972, they have extended or offered bank loans totaling at least $1.4 billion, including some $275 million in Export-Import Bank loans. In addition, at least $200 million in suppliers' credits were made available (see Table 6).

16. Most of the loan capital is for industrial projects and development of raw material supplies. The largest projects include Brazil's $1.3 billion steel expansion program and its $800 million export corridors program, the latter a major effort to develop the transport system. Japan has already agreed to provide more than $450 million for the two projects, and additional offers may be forthcoming. Since early 1972, Japan has made available to Mexico some $140 million in private loans to help finance several projects, including construction of mineral processing and transport facilities and industrial projects. Large loans have also been issued or offered to Peru, Argentina, and Venezuela. Tokyo is considering dropping its ban on Export-Import Bank financing of trade with Cuba.

17. Japanese equity investment in manufacturing plants is mounting. By far the largest number are in Brazil, where the Japanese have an equity share in at least 200 firms, including the largest private steel company and one of the largest shipyards. Japan is expanding its equity interests in industries producing steel, motorcycles, heavy machinery, electronics, chemicals, and textiles. Two Japanese trading companies -- Mitsubishi and

Table 6

Selected Japanese Long-Term Suppliers' Credits
Issued to Latin American Countries
1972-73

Brazil:	A $36 million suppliers' credit from C. Itoh & Co. and Ishikawajima-Harima Heavy Industries to the Brazilian Ministry of Public Works for port development. Terms: 10% down, 8% annual interest, repayment in 18 semi-annual installments beginning 1 January 1974.
	A $30 million suppliers' credit from Mitsui & Co. to the Brazilian railway system. Terms: 6.5% annual interest, repayment over 15-1/2 years, including a three-year grace period.
	A $20 million loan from Japanese trading companies, and an $8 million suppliers' credit to a US-Brazilian mining enterprise.
Peru:	A $31 million suppliers' credit from Mitsui & Co. and Furukawa Electric for an electrolytic copper refinery. Terms: 6.75% annual interest, repayment over 10 years from the start of operations, set for some time in 1975.
	A $15 million loan from Mitsubishi Corp. to the state-owned oil company for general operations.
	A $3 million suppliers' credit from Marubeni Corp. to cover part of the costs of a $19 million catalytic cracking plant to be built by Marubeni and another Japanese firm.
Cuba:	A $26 million motor vehicle sale is being financed by a five-year deferred credit provided by the suppliers -- Hino Motors, Nissan Diesel, and Toyota Motors.
Bolivia:	A $7 million loan from C. Itoh & Co. for a sugar mill expansion program.
Nicaragua:	A long-term loan (amount not known) extended by Toyo Menka to help finance construction of an oil refinery.

Mitsui -- reportedly each intend to provide more than $1 billion in loans and equity investments to expand their Brazilian operations in the next several years. Tokyo estimates that the Japanese capital stake in Brazil could reach $4 billion by the end of the 1970s.

18. Japan's growing manufacturing activities in Latin America are partly aimed at circumventing high tariffs that protect against imports of finished consumer goods. Japan is penetrating these markets by establishing plants that use Japanese components or intermediate products. The growth in motor vehicle sales, for example, is directly tied to the presence of Japanese-owned vehicle assembly plants in Mexico, Peru, and Chile. Electronics and textile plants also have been established in several Latin American countries with an eye toward circumventing high tariffs on these items.

19. Because of rising wage rates at home and currency realignments since 1971, the Japanese have begun setting up plants in the region to produce goods for sale in the US market. In 1971, one firm began assembling electronic calculators in Mexico's border region for export to the United States, and Mitsubishi is planning a similar operation. In addition to low labor costs and proximity to the US market, Japanese firms are being attracted to the border region because equipment and components can be imported to Mexico duty free and plants do not have to meet the requirements of 51% Mexican ownership. Plants making textiles and electronics products for the US market are also in operation or under construction in Central America and Brazil (see Table 7).

Official Aid to Latin America

20. Through 1970, official economic aid to Latin America was minimal. Aid was limited to three development loans totaling $31 million to Paraguay, Brazil, and Mexico plus $8 million in technical assistance. Loan terms were less generous than those offered to countries in regions where Japan's economic stake was greater. Multilateral aid consisted of $30 million in loans to the Inter-American Development Bank (IDB).

21. During the past year or so, Tokyo has stepped up its aid, granting loans totaling $152 million to Peru, Mexico, Paraguay, Costa Rica, and Chile. Moreover, the terms of aid have been substantially eased by reducing interest rates to as low as 3.5% and extending repayment periods to 20 or 25 years. In all cases, aid remains tied to purchases of Japanese goods. At present, Tokyo is weighing loan requests from several Latin American countries totaling some $220 million. Tokyo is also considering a $15 million grant to the IDB and may join the bank.

Table 7

Selected Japanese Investments in Latin American Plants
Past, Present, and Planned

Industry	Country	Japanese Investor	Comments
Textiles	Brazil	Ataka & Co.	Bought an interest in a Brazilian synthetic knitwear enterprise. Plans call for exporting one-half of production to the United States.
	Mexico	Teijin C. Itoh & Co.	A joint synthetic fabric venture with local interests. Production scheduled to begin in 1974, initially aimed at local market with future operations to export to the United States.
	Costa Rica	Toyobo	A joint venture with a local apparel manufacturer. Output aimed mainly at the US market. Toyobo's existing fabric plants in Costa Rica and El Salvador are providing intermediate materials.
	Guatemala	Asahi Kasei Goko Dying	A joint venture with local interests to produce acrylic thread. Output initially aimed at local market, with future operations to include manufacture of finished products for export, largely to the United States.
Electronic/ Electrical products	Mexico	Mitsubishi Electric	A joint venture with a Mexican electric machinery producer. The firm plans to export electrical and electronic products to the United States. Exports of Mitsubishi Electric will include color television sets.
		Hitachi	A joint venture with a Mexico City television producer which exports part of its output to the United States. Production includes black and white and color television sets.
		Toko	Established a subsidiary in Juarez under the Border Industries Program. The venture produces electronic computer parts for sale in the United States through Toko's New York subsidiary.
		Omron Tateisi Electronics	Recently doubled the capacity of its Tijuana plant producing desk top calculators for export to the United States.
	Brazil	Sony	A wholly owned subsidiary to produce color television sets. Initially, output will aim at local sales, but future exports to the United States are planned.
Steel products	Brazil	NHK Spring Nissho-Iwai Kobe Steel or Daido Steel	Plans call for acquisition of shares in a Brazilian automobile spring maker. Output will be sold domestically and to the US market.
	Mexico	Three steel firms (not further identified)	Plans call for a pipe production venture at Tijuana. Output will be exported to the United States for use in the manufacture of outdoor furniture.
		Nissho-Iwai	Will build a wire-drawing facility near Tijuana to produce nails for sale to the United States and local markets. It may be a wholly Japanese-owned venture or include a US or local partner and will use either Japanese or US wire. About 60% of production will go to the United States, replacing part of direct Japanese nail sales to this country.
Chemical/	Brazil	C. Itoh & Co.	Bought an interest in a Brazilian synthetic leather goods producer. C. Itoh will use its commercial distribution facilities to expand sales of the manufacturer' products to the United States.
		Fuji Photo Film	Construction under way on a plant to produce X-ray and movie film and 35-mm black and white and color film. Except for X-ray film, all or part of output will be exported to the United States.
		Konishiroku Photo Industry	Construction under way on a plant to produce X-ray and movie film and 35-mm black and white and color film. All or part of output, except X-ray film, will be sold to the US market.

Prospects

22. Japan's presence in Latin America will continue expanding as new marketing and investment opportunities are exploited. Given the strong Japanese competitive position and willingness to provide large amounts of loan capital, exports to the region should reach $5 billion annually within the next five years, raising Japan's share of the market to perhaps 15%. [redacted]

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24. The Japanese will look increasingly to Latin America for key primary products, and substantial amounts of Japanese capital will be committed to boost production and exports of these products. Besides traditional commodities such as metallic ores, sugar, and cotton, several agricultural and forestry products will increasingly attract Japan's eye. [redacted] 25X6

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SURVEY NO. (1-6)	RECORD TYPE (7-8)	OFFICE (9-10)
	0 2	01 OCI; X 02 OER; 03 OSR; 04 OBGI; 05 SRS; 06 CRS; 07 OSI; 08 FMSAC; JOINT OFFICE (specify): (_ _)

TOPICAL CATEGORY		GEOGRAPHIC AREA CATEGORY	
	Domestic Politics		USSR
	International Relations		Eastern Europe
X	Economics		Communist China
	Military	X	Other Far East
	Science & Technology		Near East
	Geography		South Asia
	Biography		Africa
		X	Latin America
			Western Europe

LIST SPECIFIC COUNTRIES: JAPAN, BRAZIL, MEXICO, PERU, CHILE, VENEZUELA, ARGENTINA, COLOMBIA, ECUADOR, CUBA

TO BE COMPLETED BY IRS

REC TYPE (7-8)	TOPIC (11-12)	AREA (13-16)

FORM 1-73 3492 SECRET E 2&3 IMPDET CL BY 007622 (10-13-43)

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