FGV
ccgi
Centro do Comércio Global e Investimentos

DESAFIOS DA POLÍTICA DE COMÉRCIOEXTERNO

2013

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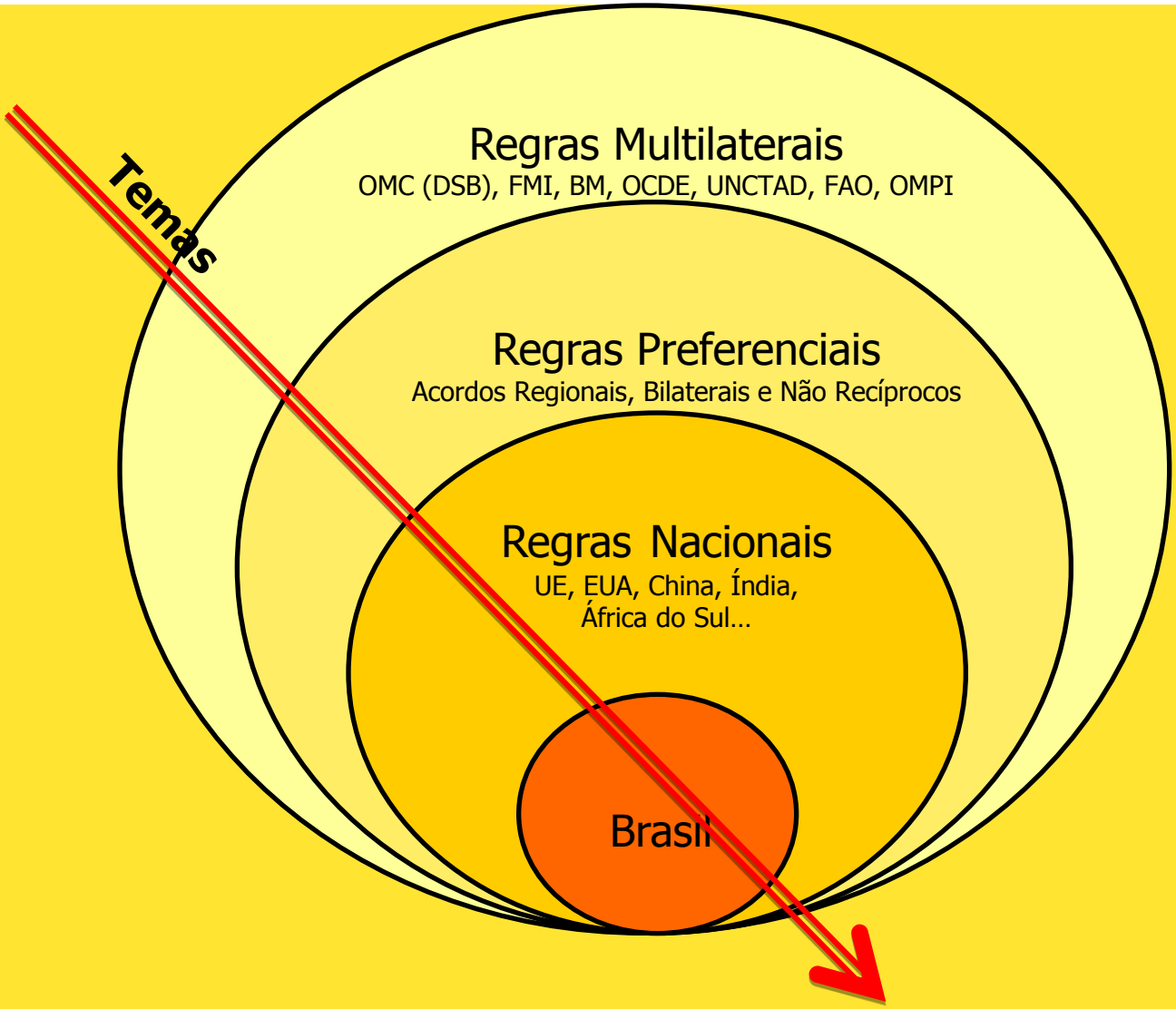
Sistema Multilateral de Comércio



Sistema dos Estados x Sistema das Transnacionais

Lógica dos Estados

- Comércio de bens
- Tarifas, quotas
- AD, CVM, salvaguardas
- Regras de origem
- Subsídios
- **SOLUÇÃO CONTROVÉRSIAS**

Lógica das Transnacionais

- "Trade in tasks" (cadeias de valor)
- **Sem** Tarifas, AD, CVM, Salv., ou RO preferenciais
- Investimento, concorrência, Propriedade Intelectual
- Harmonização de padrões (TBT/SPS/privados)
- **ARBITRAGEM**

DESAFIO 1

OMC

- Crise na Rodada
- Bali – facitilação, agricultura, desenvolvimento

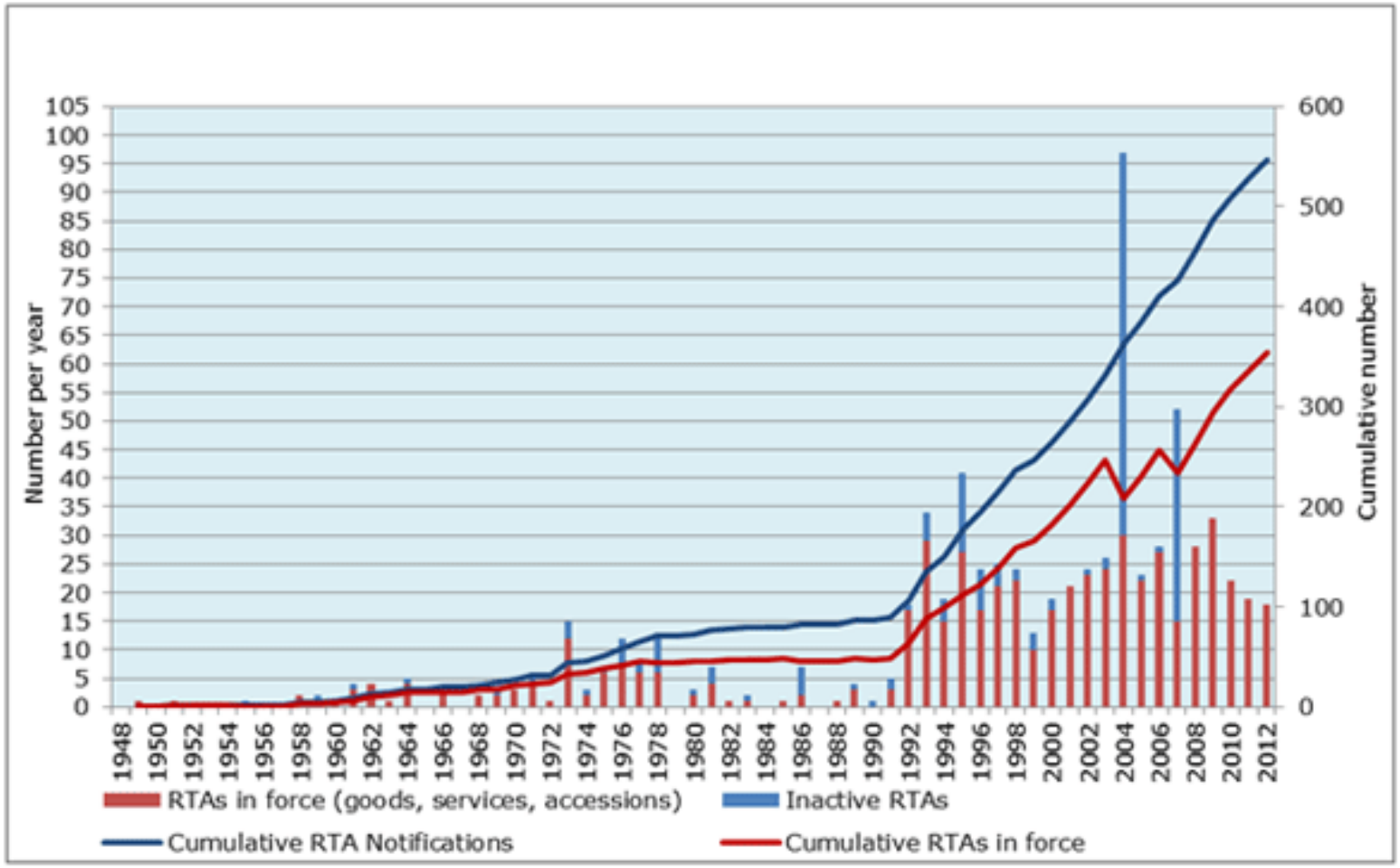
ACORDOS PREFERENCIAIS

400 acordos

2 mega – acordos

Brasil – isolado na AmS

A Evolução dos APCs no mundo



Fonte: OMC

DESAFIO 2

- MEGA-ACORDOS

TTIP – EUA + UE = Regras +Barreiras Não Tarifárias
+ Regas OMC plus e extra

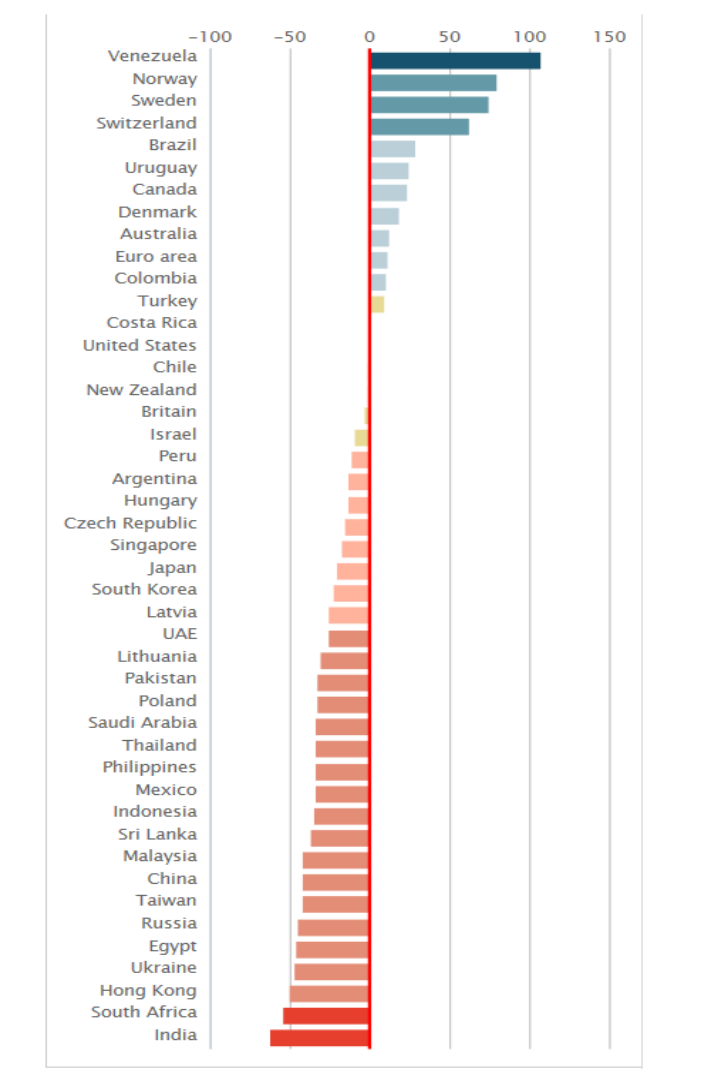
TPP – EUA + 13 = Tarifas + Regras OMC plus

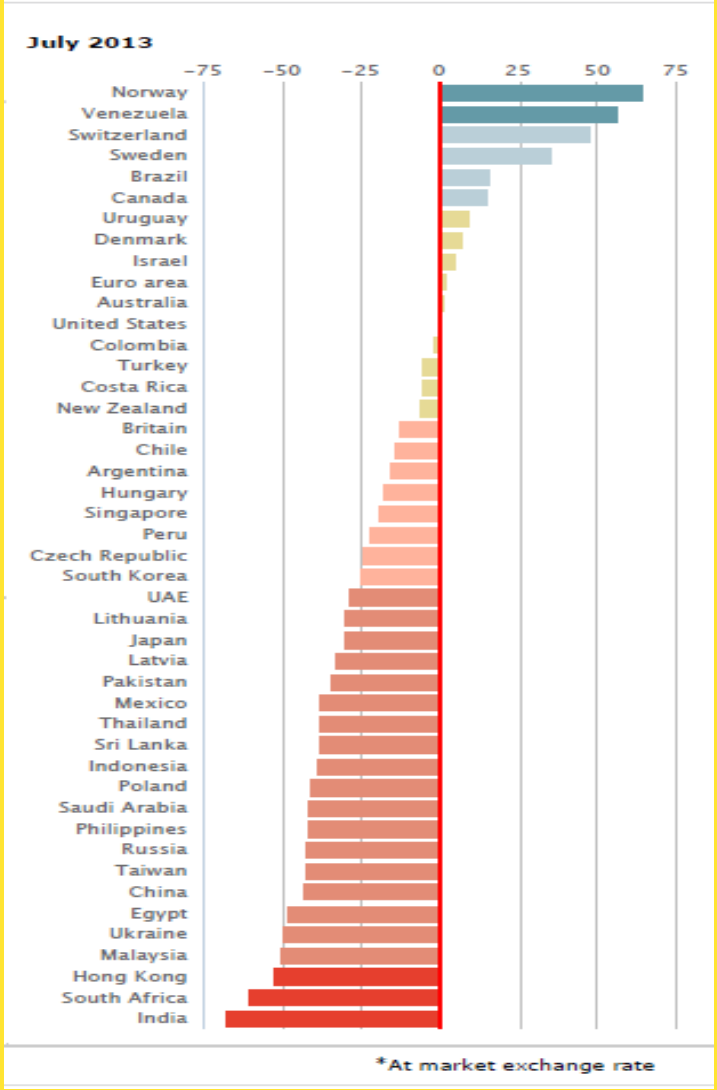
CHINA – ASEAN

UE - India

DESAFIO 3 Desalinhamentos cambiais

Mc Donald Index 1/2013 e 7/2013

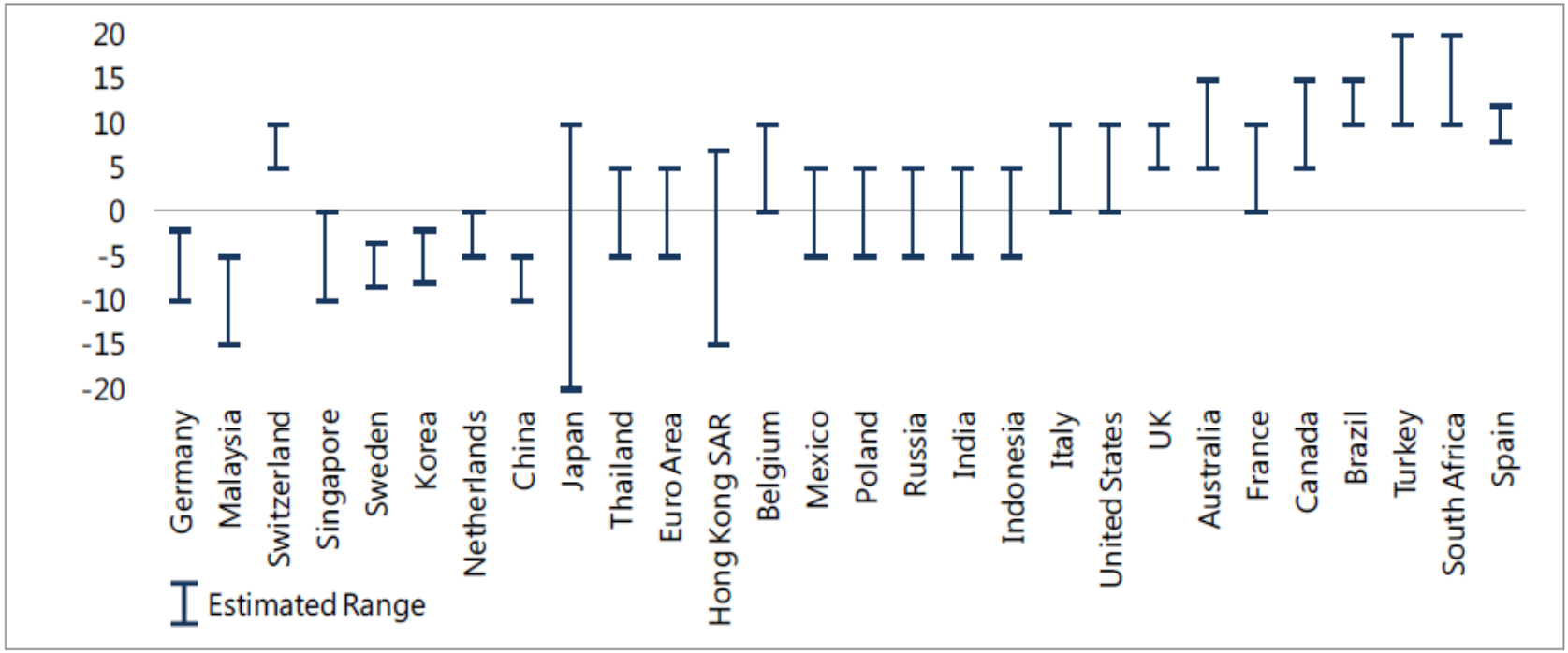




FMI – Desalinhamentos (6/2013)
Pilot External Sector Report

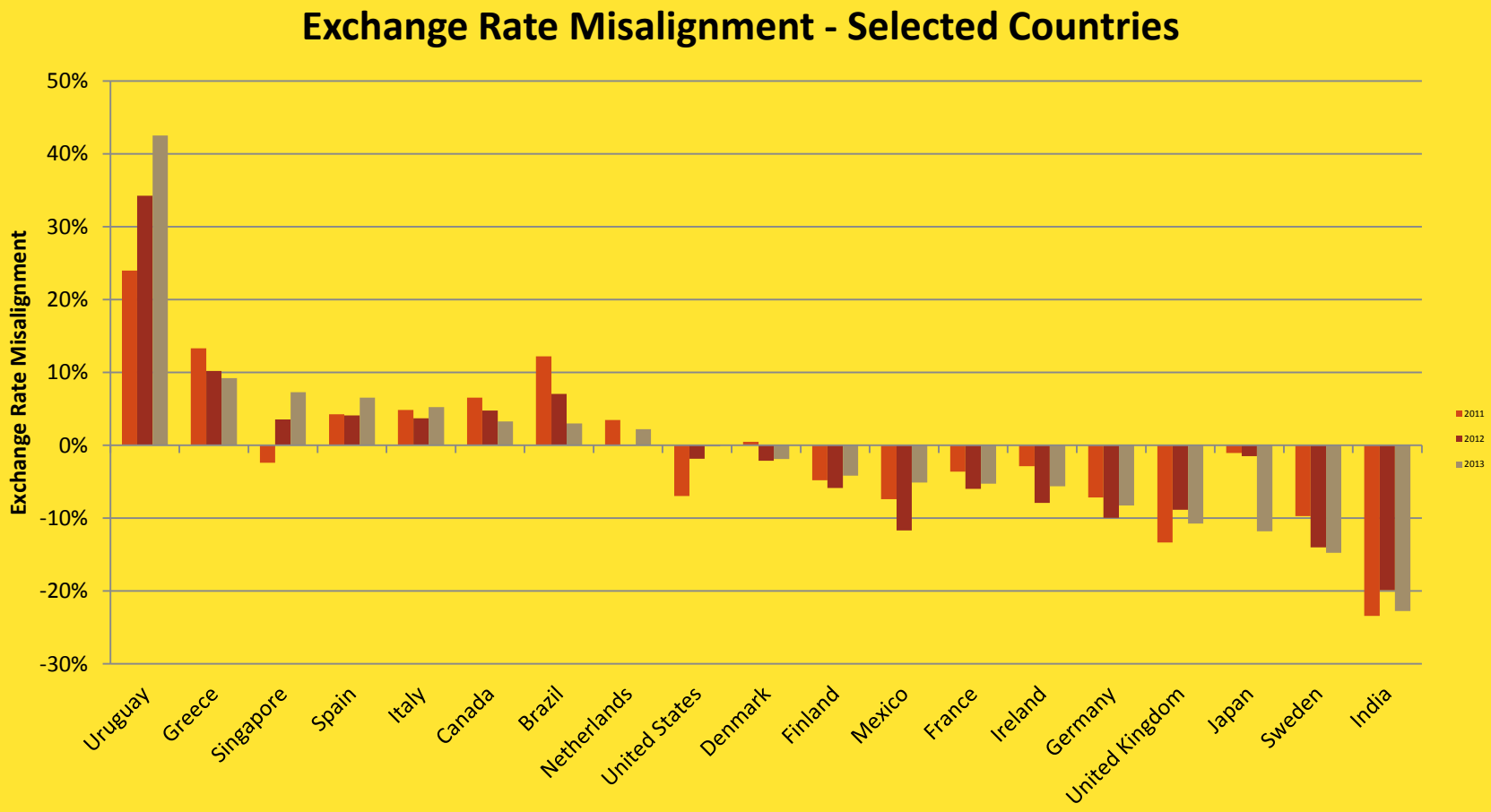
Estimated Differences between Real Effective Exchange Rates and those consistent with Fundamentals and Desirable Policies

(Percent)

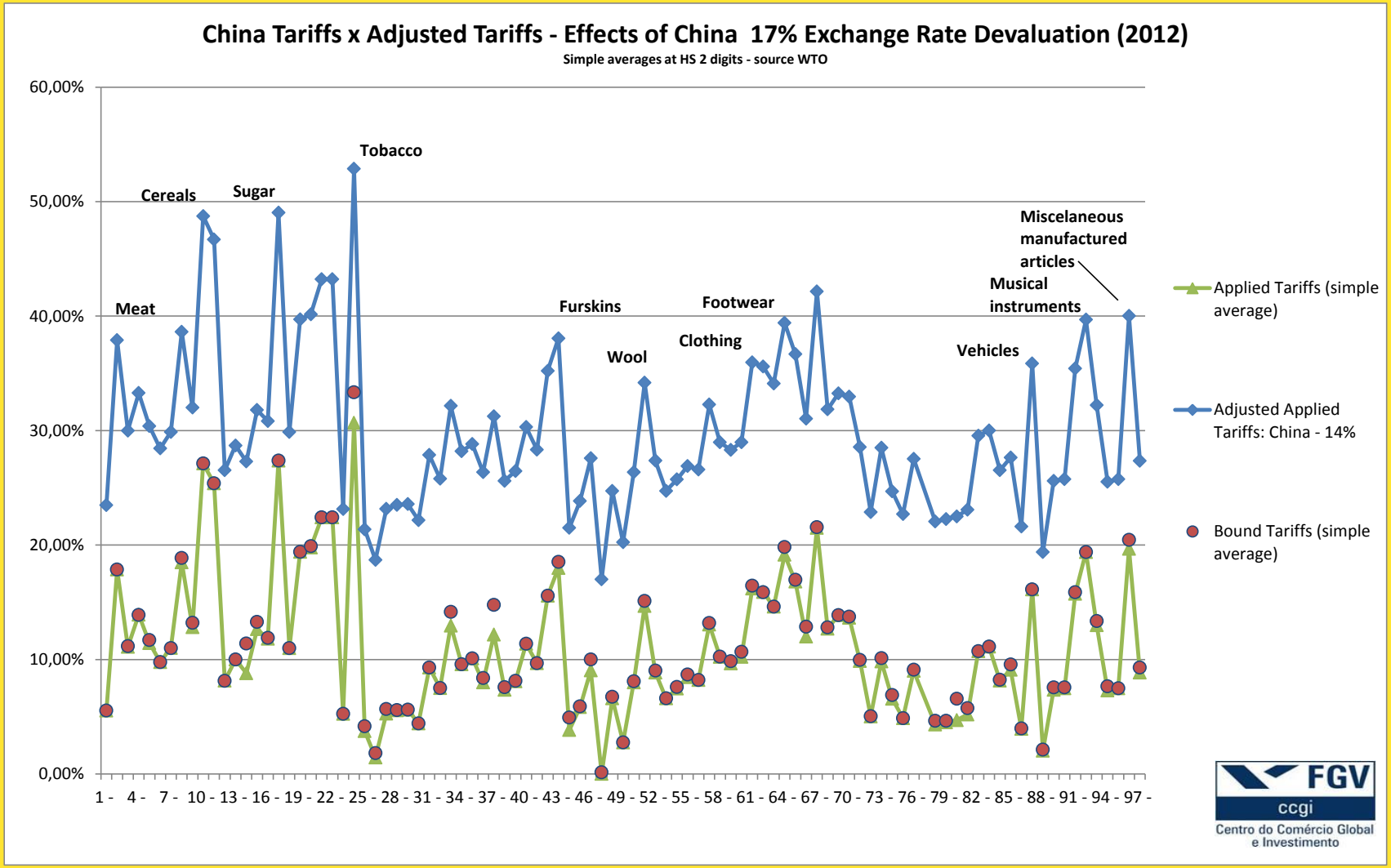


Source: IMF Staff calculations (see Figure 18 for details).

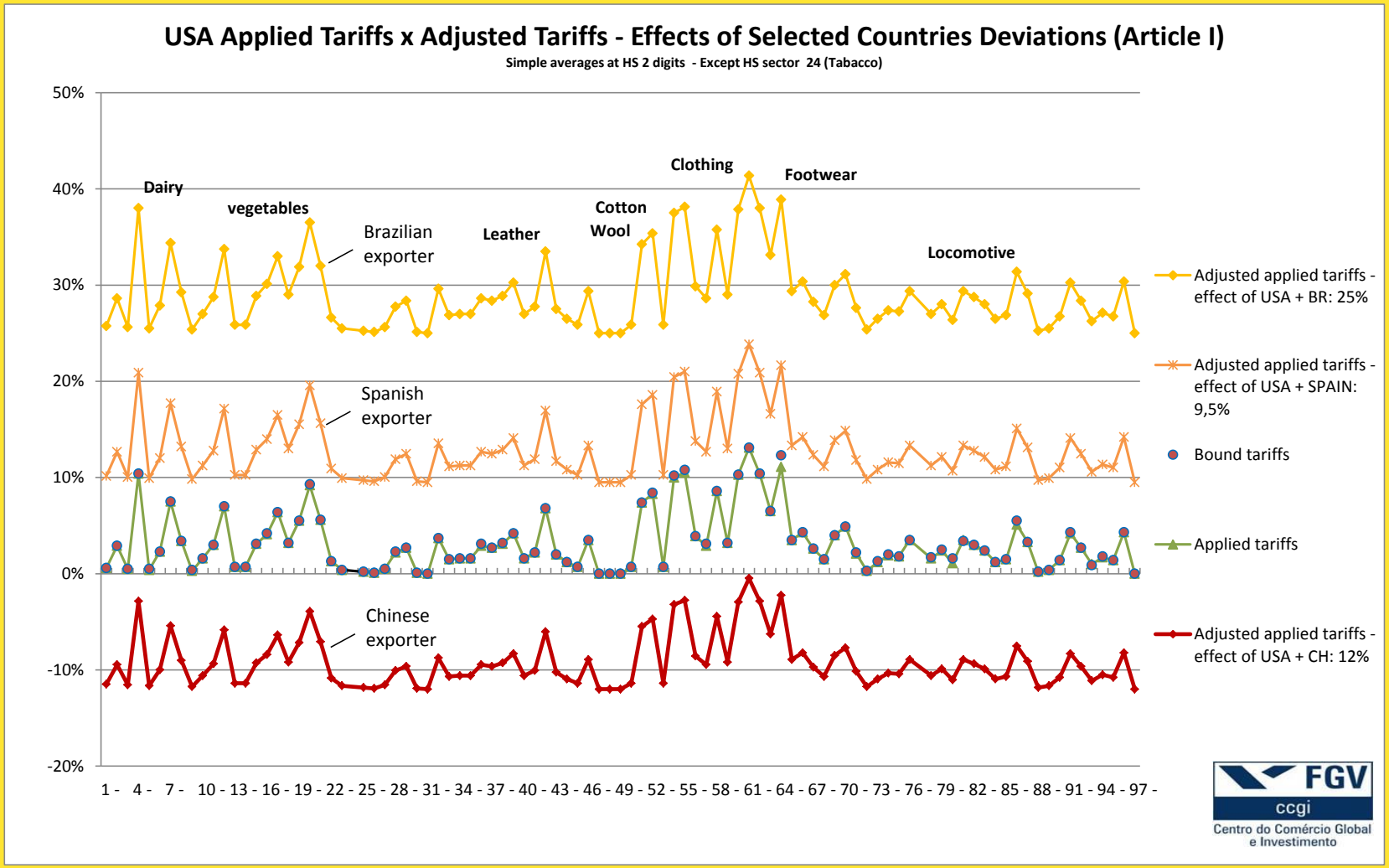
FGV – Desalinhamentos 7/2013



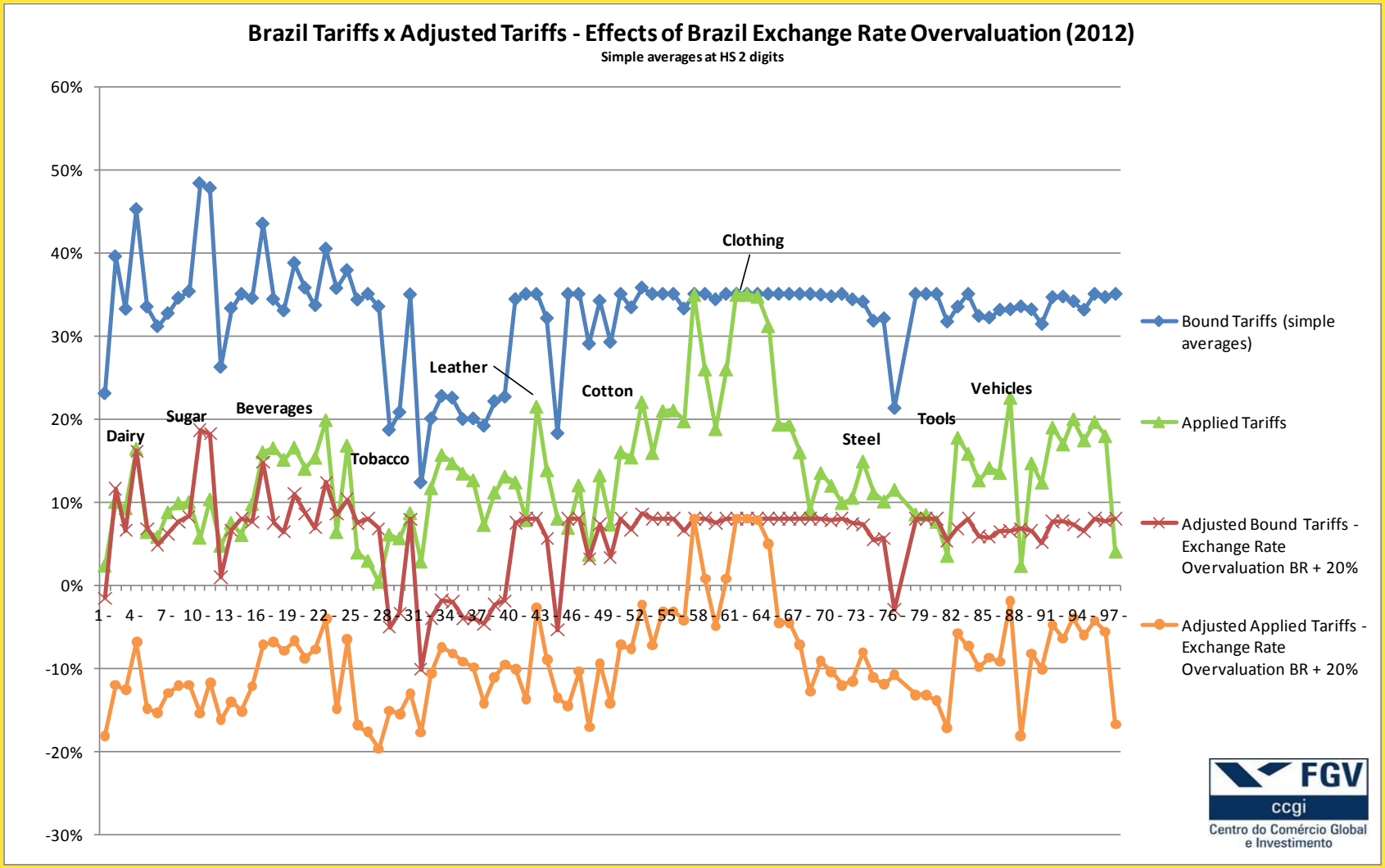
CHINA - Impactos cambio nas Tarifas 17%



EUA - Efeitos dos desalinhamentos nas tarifas
EUA (-10%) Brasil (+20) Espanha (+10) China (-15%)
2012

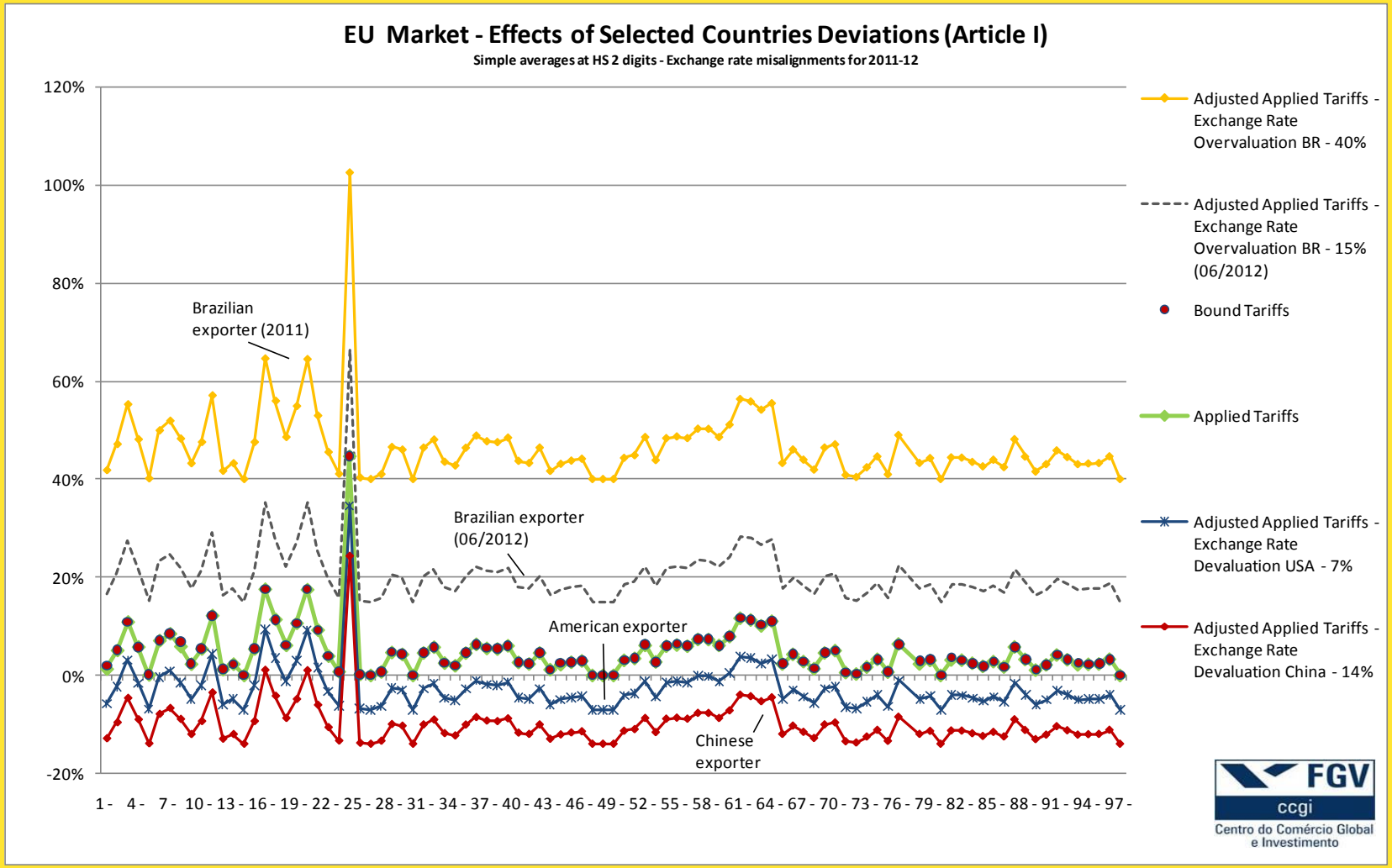


Impactos dos Desalinhamentos nas Tarifas do Brasil 2012 (+20%)

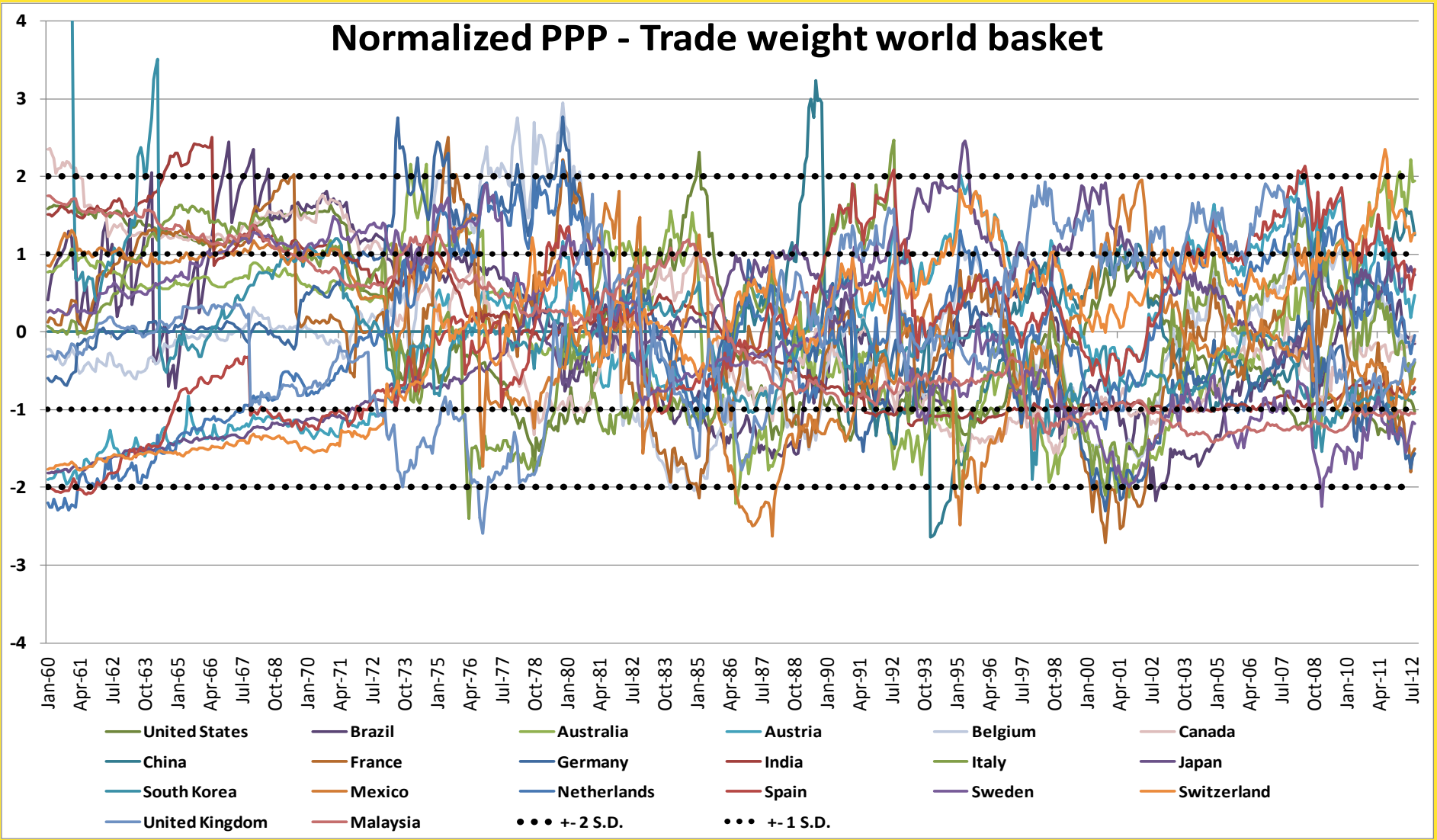


Impactos dos Desalinhamentos da UE sobre Tarifas

Brasil (+20% e +10%) US (-10%), China (-15%)



PROPOSTA – Criação de bandas cambiais



Desafio 4 – Brasil deve fazer acordos com quem ?

- UE
- EUA
- China
- Índia
- Africa do Sul
- México
- Canadá
- Japão
- AmS

Simulação 1 – Brazil x US – EU – China – SAm

Hipóteses:

<u>EUA e UE</u>

- Liberalização parcial en Agricultura = 50% reducão
- Liberalização total para indústria e serviços

<u>China</u>

- Liberalização total para agricultura
- Liberalização parcial para a indústria do Brasil = 50% redução

<u>America do Sul</u>

- Liberalização plena

Variação do PIB setorial

Variation on GDP (%)	**Classification**
0 – 1	(+) or (-)
1 – 2	(++) or (--)
2 – 3	(+++) or (---)
More than 3	(++++) or (----)

Simulation 1 – Brazil x US – EU – China – SAm

GDP by sector – Agriculture

Agriculture	EU 27	US	China	South America
Paddy rice	+	+	-	-
Wheat	+	+	+	-
Other cereals	++	+	+	-
Vegetables/fruits	++	+	-	-
Oil seeds	-	+	++	-
Sugar (cane&beet)	+++	+	+	+
Plant fibres	-	+	+	+
Other crops (unprepared)	+	++	+	-
Cattle, horses, sheeps	++++	+	+	-
Animal products	++++	+	+	-
Raw milk	-	-	-	+
Wool, silk	-	+	-	-
Forestry products	+	+	-	-
Meat: cattle, sheeps, horses	++++	+	+	-
Meat products	++++	+	+	-
Vegetables oils and fats	+	+	+	-
Processed rice	-	-	-	-
Sugar	++++	+	+	+
Food products (animal feed)	++	+	+	+
Beverage, Tobacco products	+	+	-	-
Total (No. of positive results)	**15**	**18**	**13**	**5**

Simulation 1 – Brazil x US – EU – China – Sam

GDP by sector – Industry

Industry	**EU 27**	**US**	**China**	**South America**
Extractive				
Fishing	+	+	+	-
Coal	-	+	+	-
Oil	-	+	+	-
Gas	-	+	+	-
Minerals	-	+	+	-
Manufacturing				
Textiles	-	++	--	+
Apparel	-	+	-	+
Leather products	++	++++	++	+
Wood products	+	++	-	-
Paper products	-	-	+	-
Petroleum products	-	+	+	-
Chemical, rubber, plastics	--	-	+	+
Mineral (non-metallic)	-	+	-	+
Iron, steel	---	-	-	+
Metals (non-ferrous)	+	+	+	-
Metal products	---	-	-	+
Motor vehicles and parts	-	+	+	+
Transport equipament	+	++	+	-
Electronic equipment	-	-	-	-
Machinery and equipment	----	---	-	-
Manufactures	-	-	-	+
Total (No. of positive results)	**5**	**14**	**12**	**9**

Simulação 4 – Impactos do TTIP no Brasil

Hipóteses:

- TTIP – eliminação só de tarifas
- TTIP com 50% reducão de BNT
- TTIP com 100% reduão de BNTs
- Brasil acessão no TTIP - liberalização total
- Brazil acessão no TTIP – TTIP com 50% de liberalização em agricultura

Variação do PIB setorial

Variation on GDP (%)	Classification
0 – 1	(+) or (-)
1 – 2	(++) or (--)
2 – 3	(+++) or (---)
More than 3	(++++) or (----)

Simulation 4 – Impacts of TTIP on Brazil

GDP by sector – Agriculture

Agriculture	TTIP	TTIP + NTB (50%)	TTIP + NTB (100%)	TTIP + NTB (100%) + Brazil (100%)	TTIP + NTB (100%) + Brazil (50% Ag)
Paddy rice	-	-	-	-	-
Wheat	+	++	+++	----	----
Other cereals	-	-	--	++++	++++
Vegetables/fruits	-	-	-	++++	++++
Oil seeds	+	-	--	++++	++++
Sugar (cane&beet)	+	+	+	++++	++++
Plant fibres	-	+	+	----	----
Other crops (unprepared)	-	--	---	++++	++++
Cattle, horses, sheeps	-	-	-	++++	++++
Animal products	-	--	--	++++	++++
Raw milk	-	-	+	-	-
Wool, silk	-	-	+	+	++
Forestry products	+	+	++	----	---
Meat: cattle, sheeps, horses	-	-	-	++++	++++
Meat products	-	---	----	++++	++++
Vegetables oils and fats	-	-	-	++++	++++
Processed rice	-	-	-	-	-
Sugar	-	+	+	++++	++++
Food products (animal feed)	-	-	-	++++	++++
Beverage, Tobacco products	-	-	-	-	-
Total (No. of positive results)	**4**	**5**	**7**	**13**	**13**

Simulation 4 – Impacts of TTIP on Brazil

GDP by sector – Industry

Industry	TTIP	TTIP + NTB (50%)	TTIP + NTB (100%)	TTIP + NTB (100%) + Brazil (100%)	TTIP + NTB (100%) + Brazil (50% Ag)
Fishing	-	-	-	+	+
Coal	+	+	+	----	----
Oil	+	+	-	--	-
Gas	+	+	+	----	----
Minerals	+	+	+	----	----
Manufacturing					
Textiles	-	+	+	----	----
Apparel	-	-	-	++	++
Leather products	-	-	-	----	++++
Wood products	+	++	+++	----	----
Paper products	+	+	++	----	----
Petroleum products	-	-	-	--	-
Chemical, rubber, plastics	+	+	+	----	----
Mineral (non-metallic)	-	-	-	---	-
Iron, steel	+	-	-	----	----
Metals (non-ferrous)	-	+	+	----	----
Metal products	+	+	+	----	----
Motor vehicles and parts	-	-	+	----	----
Transport equipament	+	---	----	----	----
Electronic equipment	+	+	+	----	----
Machinery and equipment	+	+	++	----	----
Manufactures	-	-	-	--	--
Total (No. of positive results)	**12**	**12**	**12**	**2**	**3**

Simulação 7 - Brasil x Canada – Japão – Corea – Mexico – India – Africa Sul

Hipóteses:

- Serviços: Liberalização total
- Africa Sul: Liberalização total
- Mexico: Liberalização total
- Canada: Liberalização total
- India: Agricultura (50% - India) + Industria (50% - Brasil)
- Japão : Agricultura (50% - Japão) + Industria (50% - Brasil)
- Corea - Agricultura (50% - Korea) + Industria (50% - Brasil)

Variação do PIB setorial

Variation on GDP (%)	Classification
0 – 1	(+) or (-)
1 – 2	(++) or (--)
2 – 3	(+++) or (---)
More than 3	(++++) or (----)

Simulation 7 – Brazil x Canada – Japan – South Korea – Mexico – India – South Africa

GDP by sector (%): Agriculture

Agriculture	**Canada**	**Japan**	**South Korea**	**Mexico**	**India**	**South Africa**
Paddy rice	-	+	-	-	-	-
Wheat	-	-	-	-	++++	-
Other cereals	+	+	++++	-	-	-
Vegetables/fruits	-	+	-	-	-	-
Oil seeds	-	-	+	-	+	-
Sugar (cane&beet)	-	-	-	-	+	-
Plant fibres	-	++++	-	+	-	-
Other crops (unprepared)	-	-	+	+	-	-
Cattle, horses, sheeps	-	-	-	-	-	-
Animal products	+	+	+	-	-	+
Raw milk	++++	-	-	-	-	+
Wool, silk	-	+	-	-	-	-
Forestry products	-	-	-	+	-	-
Meat: cattle, sheeps, horses	-	-	-	-	-	-
Meat products	-	+	+	-	-	+
Vegetables oils and fats	-	-	-	-	++	+
Milk & Dairy	++++	-	+	-	-	+
Processed rice	-	-	-	-	-	-
Sugar	-	-	+	-	+	-
Food products (animal feed)	+	+	+	+	-	+
Beverage, Tobacco products	-	+	+	+	-	-
Total	**5**	**9**	**9**	**5**	**5**	**6**

Simulation 7 - Brazil x Canada – Japan – South Korea – Mexico – India – South Africa

GDP by sector (%): Industry

Industry	**Canada**	**Japan**	**South Korea**	**Mexico**	**India**	**South Africa**
Extrative						
Fishing	+	+	-	-	-	-
Coal	-	-	-	-	-	-
Oil	-	-	-	-	-	-
Gas	-	-	-	-	-	-
Minerals	-	-	-	-	+	-
Manufacturing						
Textiles	+	++++	-	+	-	-
Apparel	+	-	+	+	-	+
Leather products	+	+	+	++	-	+
Wood products	-	-	+	+	-	-
Paper products	-	-	-	-	-	-
Petroleum products	-	-	-	+	-	-
Chemical, rubber, plastics	-	-	-	-	-	-
Mineral (non-metallic)	-	-	-	-	-	+
Iron, steel	-	-	-	+	+	-
Metals (non-ferrous)	-	-	-	-	-	-
Metal products	-	-	-	+	-	-
Motor vehicles and parts	-	-	-	-	-	+
Transport equipament	-	-	+	+	-	-
Electronic equipment	-	-	-	-	-	-
Machinery and equipment	-	-	-	+	+	-
Manufactures	-	-	-	+	-	-
Total	**4**	**3**	**4**	**10**	**3**	**4**

Conclusões:

- Maiores ganhos: EU e UE
- Mercosul: camisa de força
- TTIP: perdas em agricultura
- Melhor cenário: entrar no TTIP