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VIII. EXPORT INTERESTS IN BRAZIL

Export interests in Brazil are the same as sensitive imports from the US viewpoint. State shares in output were corrected by size of state GDP and normalized for a scale from 1 to 100. Three aggregate vectors of Brazilian export interests were generated. One related to tariff peaks in the United States. The second to tariff peaks and antidumping duties. The third to tariffs, antidumping duties and subsidies that affect agricultural products. These aggregates were obtained using weights based on the shares of sales in the United Sates in 1997 (Agricultural Census and Economic Census).

Data are presented in Table 8 for the nine products affected by tariffs and the corresponding aggregate and in Table 9 for products affected by antidumping (steel products) and subsidies (pork meat and soybeans) and the two relevant aggregates. Figures 33 to 45 present the data graphically for tariff protection, Figures 46 and 47 for antidumping protection and Figures 48 to 50 for protection related to agricultural subsidies.

For oranges, the output in states other than São Paulo was considered to be zero as it is known as the only state where oranges are produced for juice exports. For other products this was not done and in some cases as poultry and pork meat which are important for subsistence, some very poor states appear as having relevant export interests as our estimates of export interests are based on overall output to avoid the difficult problem of identifying the origin of imports by state.

Sugar export interests are widespread in the South, Northeast and Center West states. The concentration in Alagoas is a result of the low diversification of economic activity in that state. Corn-related interests include new and traditional states in the Center West (Mato Grosso, Mato Grosso do Sul and Goiás) and traditional states as Paraná and , to a lesser extent, other states in South Brazil. Tobacco is a major interest in Rio Grande do Sul and Santa Catarina. Export beef interests are also important in the Center West but extend to the North (Tocantins and Rondônia). Santa Catarina and Paraná are the major exporters of poultry but the Center West states are rapidly gaining ground. Cotton interests are concentrated overwhelmingly in Mato Grosso.

The two industrial products affected by tariffs are footwear and heavy trucks. The traditional footwear exporter was Rio Grande do Sul but recently parts of the industry have moved to the Northeast (Ceará and Paraíba) seeking lower labor costs. Heavy trucks are mostly produced in the traditional industrial states in the Southeast (Rio de Janeiro and São Paulo) and in the South (mainly Paraná). In the aggregate for products affected by tariffs, export interests in Brazil are concentrated in the efficient agricultural producers of the Center West (Mato Grosso, Mato Grosso do Sul, Goiás) and Northern (Tocantins, Rondônia) regions. Other export interests tend to be diffuse.

Export interests related to steel products affected by antidumping are overwhelmingly located in Minas Gerais and Espírito Santo, and less importantly in Rio de Janeiro, in the Southeast. Those interests affected by agricultural subsidies, besides some also affected by high tariffs as corn, are pork meat and soybeans. The distribution of export interests for pork meat is affected by the subsistence argument already mentioned and this shows in the case of the states of Piaui and Maranhão. Otherwise export interests are diffuse. Export soybean interests are concentrated in the granary states in the Center West and in established producers as Paraná.

Overall export interests are little affected by these other forms of protection. As in the case of tariffs export interests are concentrated in the Center West and in the North. The main difference shown in Figure 50 (or 47 for that matter), when compared to Figure 45, is that Minas Gerais and Espírito Santo show stronger export interests.

TABLE 8
BRAZIL: EXPORT INTERESTS RELATED TO TARIFF PROTECTION IN THE UNITED STATES

	Oranges	Sugar	Corn	Tobacco	Poultry	Beef	Cotton	Footwear	Heavy trucks	All products
Rondônia	0	0	23	0	28	76	1	0	0	48
Acre	0	0	11	0	28	27	0	0	0	19
Amazonas	0	0	0	0	3	2	0	0	0	10
Roraima	0	0	0	0	36	34	0	0	0	22
Pará	0	0	14	0	24	27	0	0	0	19
Amapá	0	0	0	0	0	0	0	0	0	0
Tocantins	0	2	17	0	14	82	0	0	0	51
Maranhão	0	5	20	0	46	27	1	0	0	21
Piauí	0	2	17	0	71	23	1	0	0	19
Ceará	0	2	7	0	31	6	0	100	0	9
Rio Grande do Norte	0	6	0	0	11	6	1	0	0	4
Paraíba	0	17	0	0	28	7	0	77	0	8
Pernambuco	0	15	0	0	22	3	0	0	0	3
Alagoas	0	100	3	36	14	6	1	0	0	7
Sergipe	0	5	3	8	14	6	0	0	0	6
Bahia	0	2	10	5	15	10	3	12	0	10
Minas Gerais	0	5	20	0	24	10	0	10	22	10
Espírito Santo	0	3	3	0	9	4	0	0	0	3
Rio de Janeiro	0	1	0	0	3	1	0	0	100	4
São Paulo	0	14	6	0	11	2	0	9	78	6
Parana	0	11	93	24	74	7	2	0	59	20
Santa Catarina	0	0	45	100	100	3	0	6	0	14
Rio Grande do Sul	0	0	36	87	43	8	0	97	11	16
Mato Grosso do Sul	0	18	100	0	59	100	11	0	0	75
Mato Grosso	0	26	79	0	43	85	100	0	0	100
Goiás	0	13	92	0	33	41	11	0	0	38
Distrito Federal	0	0	2	0	5	0	0	0	0	1

TABLE 9
BRAZIL: EXPORT INTERESTS RELATED TO PRODUCTS FACING ANTIDUMPING AND SUBSIDIES IN THE UNITED STATES

	Tariffs	Steel	Tariffs & AD	Pork meat	Soybeans	Tariffs, AD & subsidies
Rondônia	48	0	46	34	0	38
Acre	19	0	23	27	0	15
Amazonas	10	0	2	5	0	1
Roraima	22	0	0	23	0	0
Pará	19	0	18	20	0	15
Amapá	0	0	0	5	0	0
Tocantins	51	0	58	18	4	38
Maranhão	21	0	23	67	8	23
Piauí	19	0	23	100	4	23
Ceará	9	2	12	15	0	9
Rio Grande do Norte	4	0	6	5	0	4
Paraíba	8	0	12	5	0	8
Pernambuco	3	2	4	3	0	3
Alagoas	7	0	6	3	0	4
Sergipe	6	0	6	3	0	4
Bahia	10	4	12	11	3	10
Minas Gerais	10	45	41	8	2	27
Espírito Santo	3	100	73	4	0	44
Rio de Janeiro	4	17	17	0	0	10
São Paulo	6	4	9	1	0	6
Parana	20	2	17	17	15	22
Santa Catarina	14	0	12	30	1	14
Rio Grande do Sul	16	3	20	13	9	17
Mato Grosso do Sul	75	0	73	17	33	62
Mato Grosso	100	0	100	20	100	100
Goiás	38	0	35	14	21	35
Distrito Federal	1	0	0	1	0	1

FIGURE 33
BRAZIL EXPORT INTERESTS: ORANGES

FIGURE 34
BRAZIL EXPORT INTERESTS: SUGAR

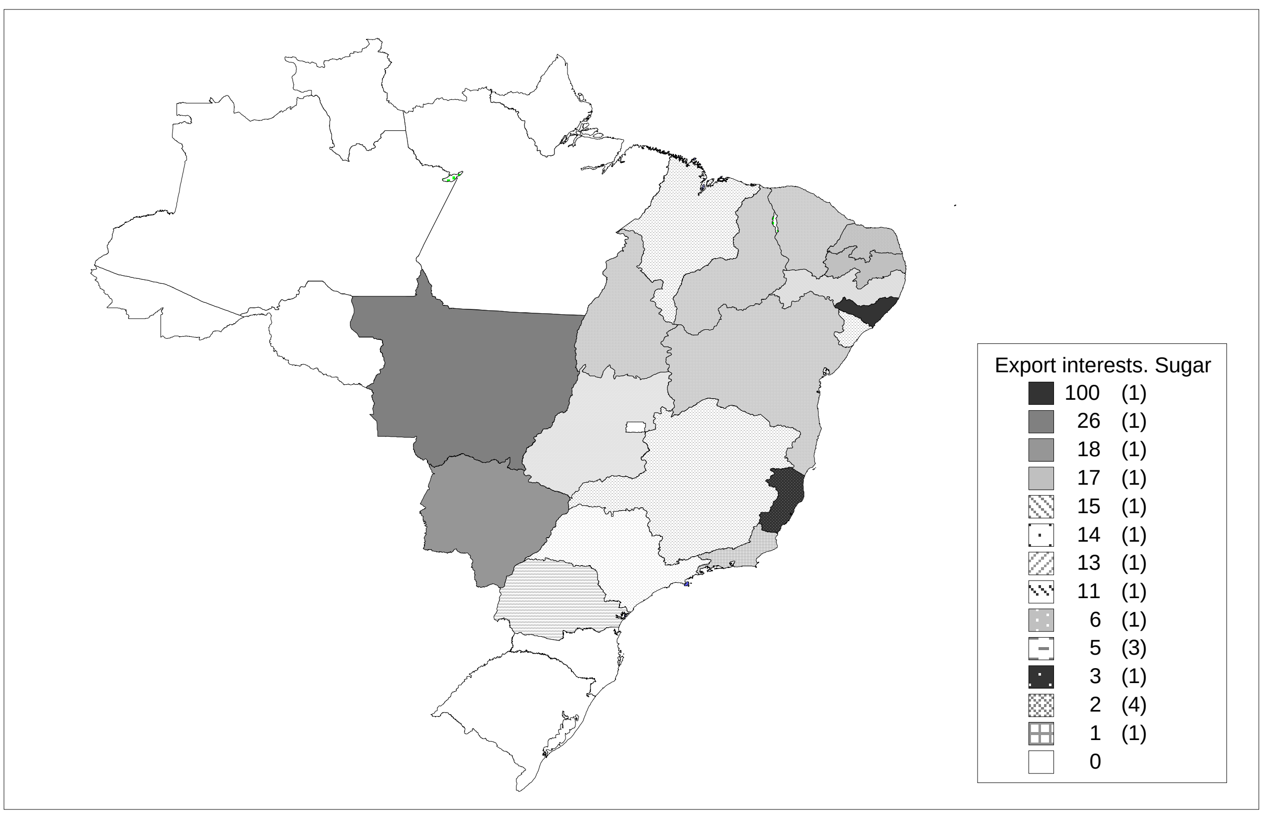


FIGURE 35
BRAZIL EXPORT INTERESTS: CORN

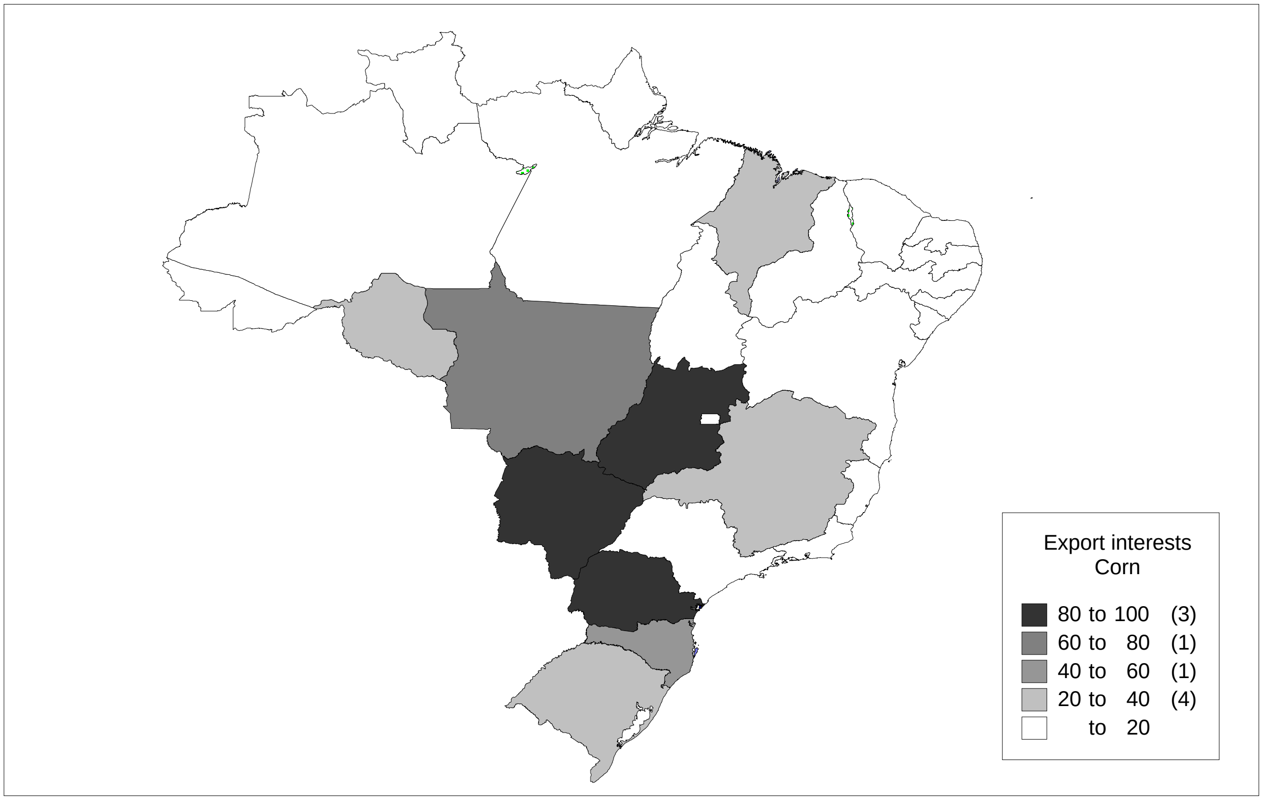


FIGURE 36
BRAZIL EXPORT INTERESTS: TOBACCO

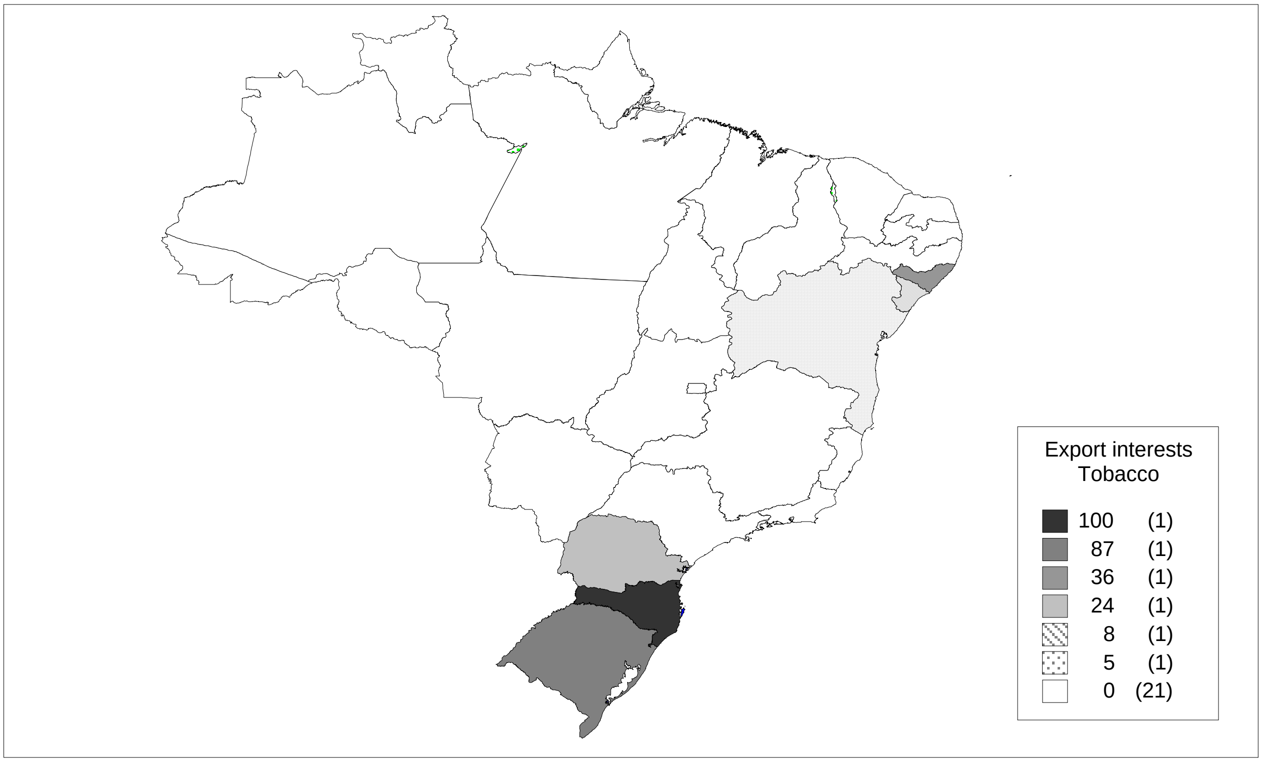


FIGURE 37
BRAZIL EXPORT INTERESTS: POULTRY

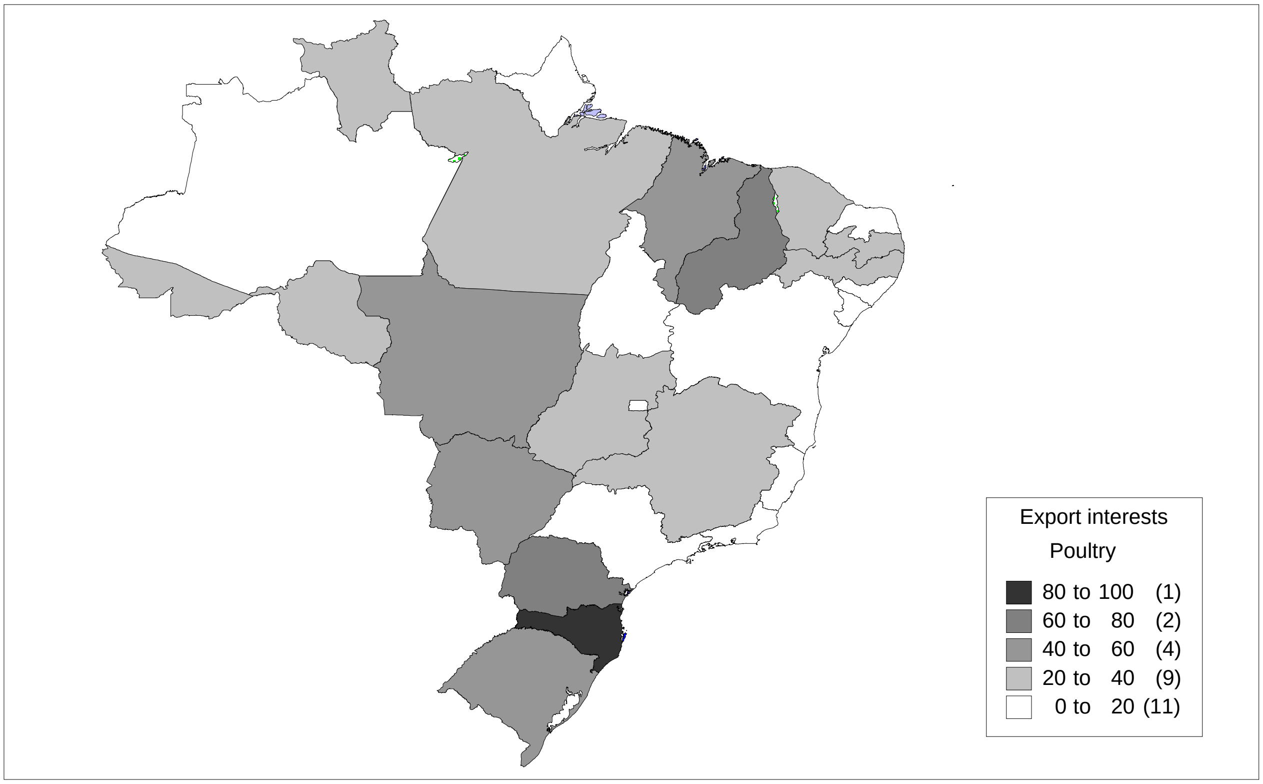


FIGURE 38
BRAZIL EXPORT INTERESTS: BEEF

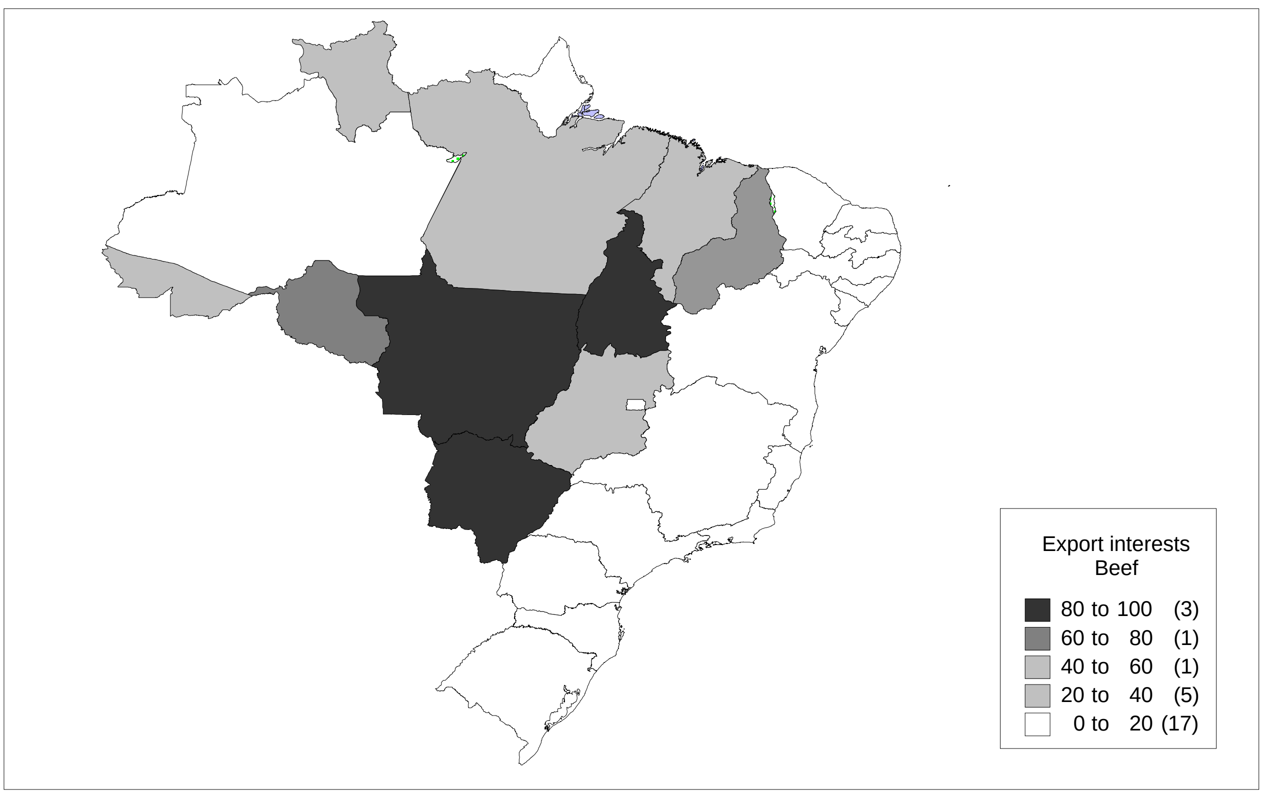


FIGURE 39
BRAZIL EXPORT INTERESTS: COTTON

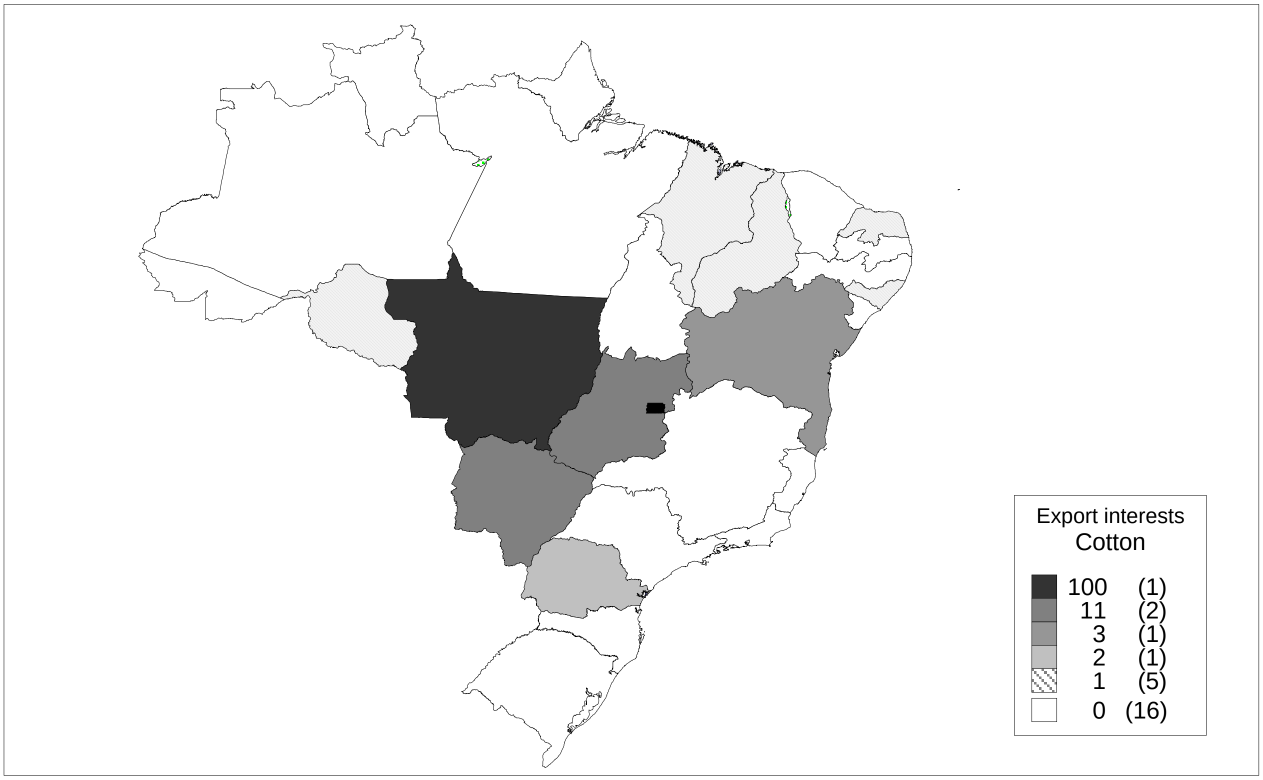


FIGURE 40
BRAZIL EXPORT INTERESTS: FOOTWEAR

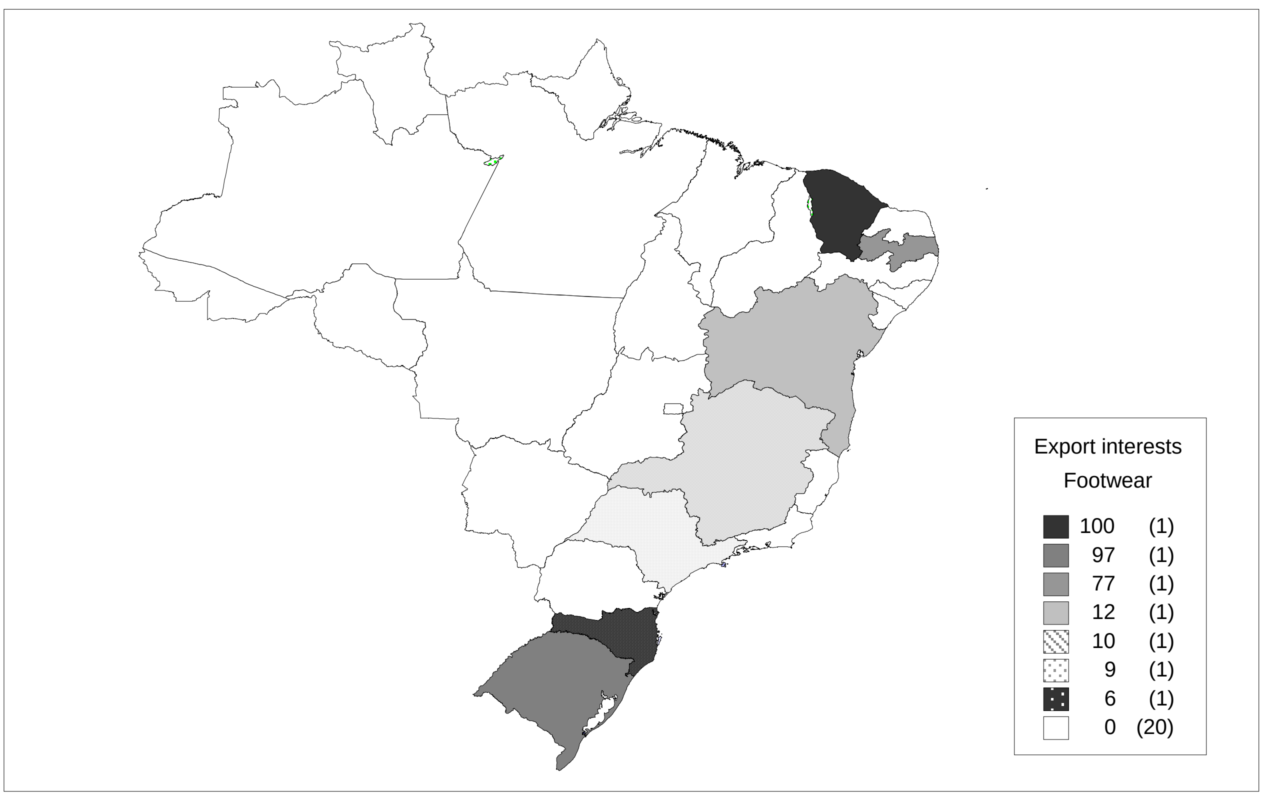


FIGURE 41
BRAZIL EXPORT INTERESTS: HEAVY TRUCKS

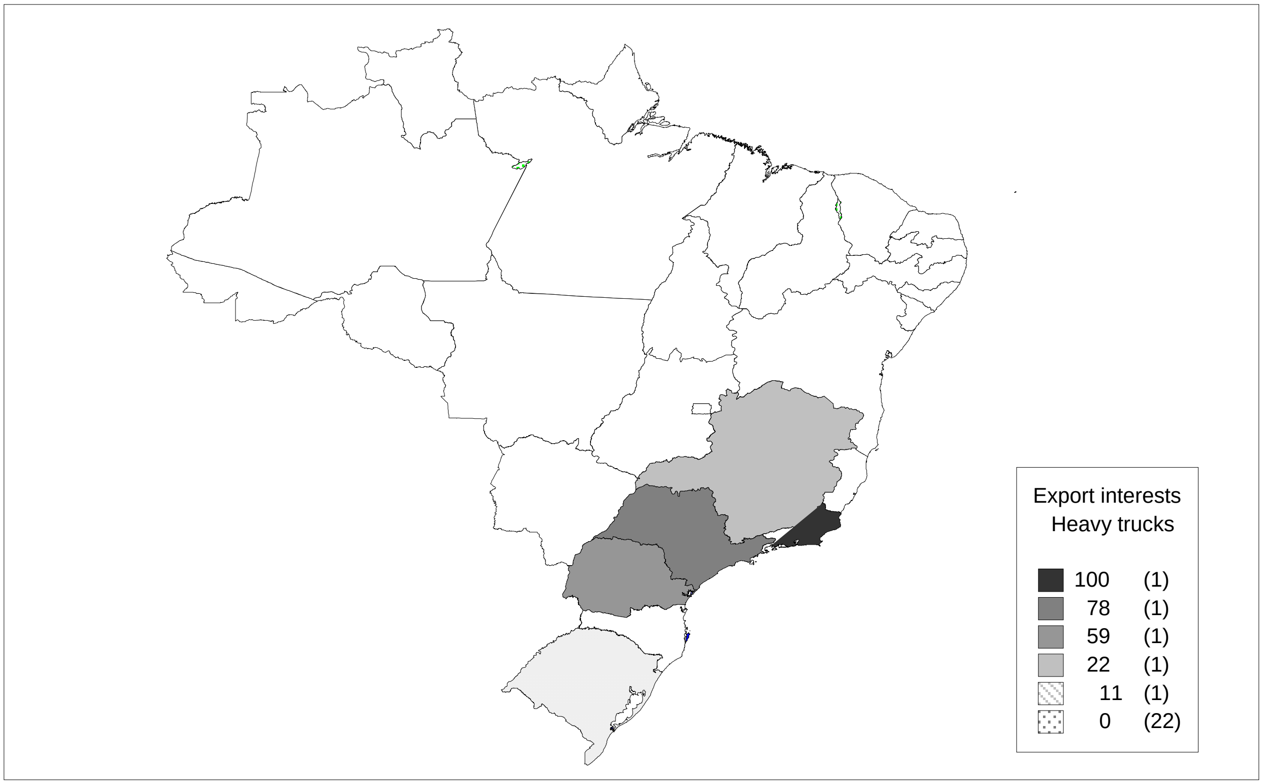


FIGURE 42
BRAZIL EXPORT INTERESTS: TARIFFS

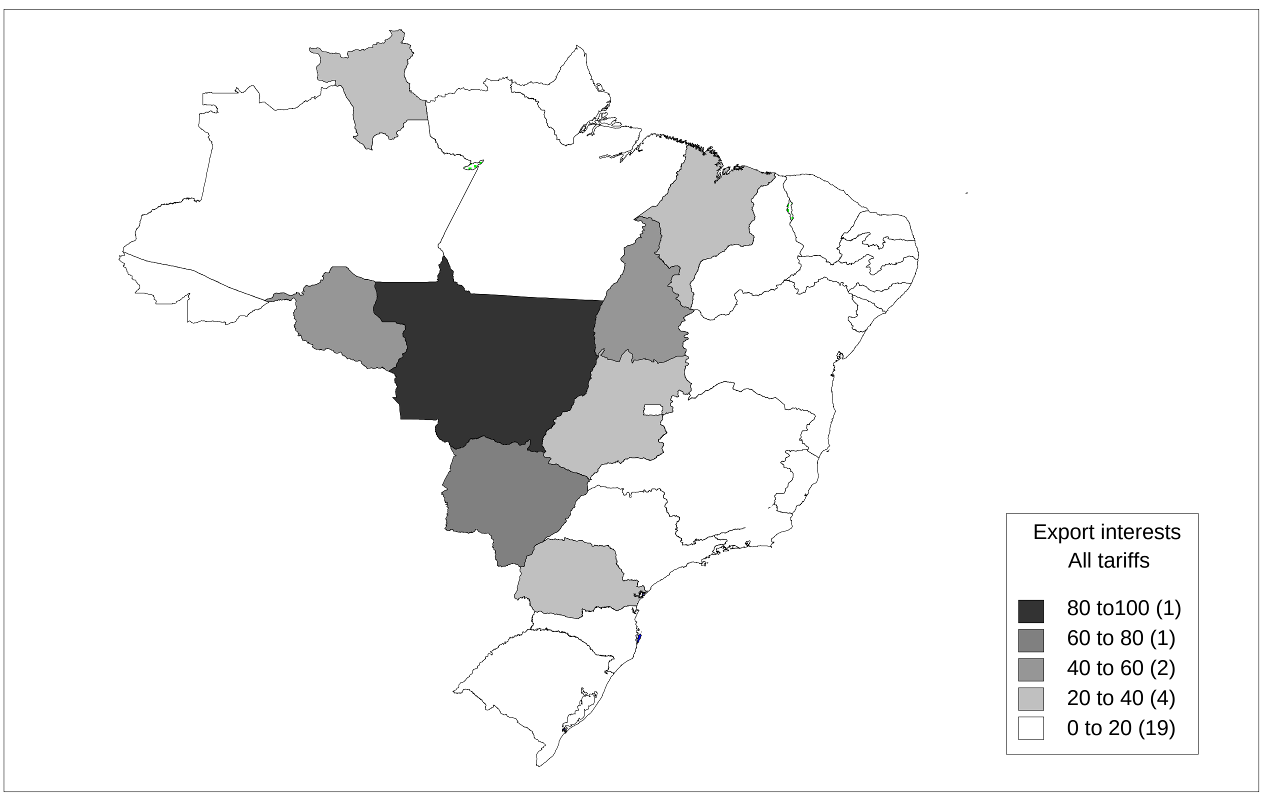


FIGURE 43
BRAZIL EXPORT INTERESTS: STEEL

FIGURE 44
BRAZIL EXPORT INTERESTS: TARIFFS AND AD

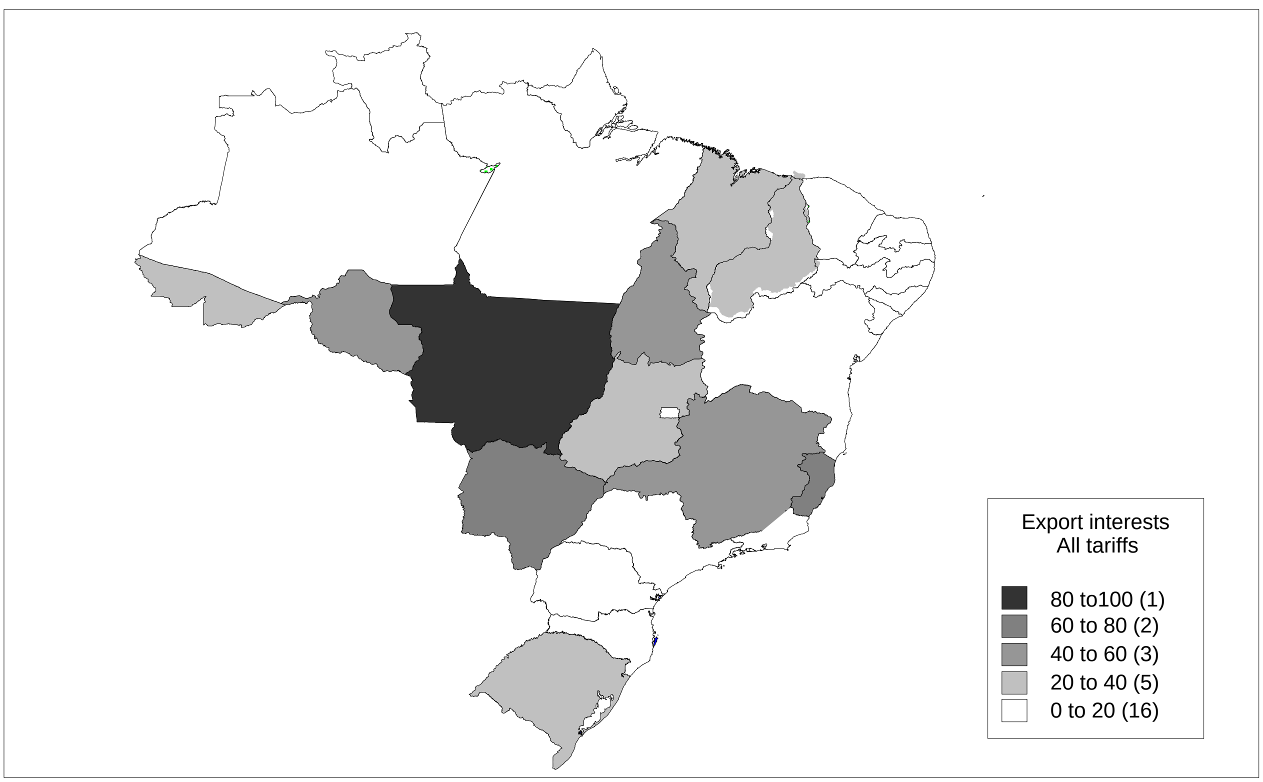


FIGURE 45
BRAZIL EXPORT INTERESTS: PORK MEAT

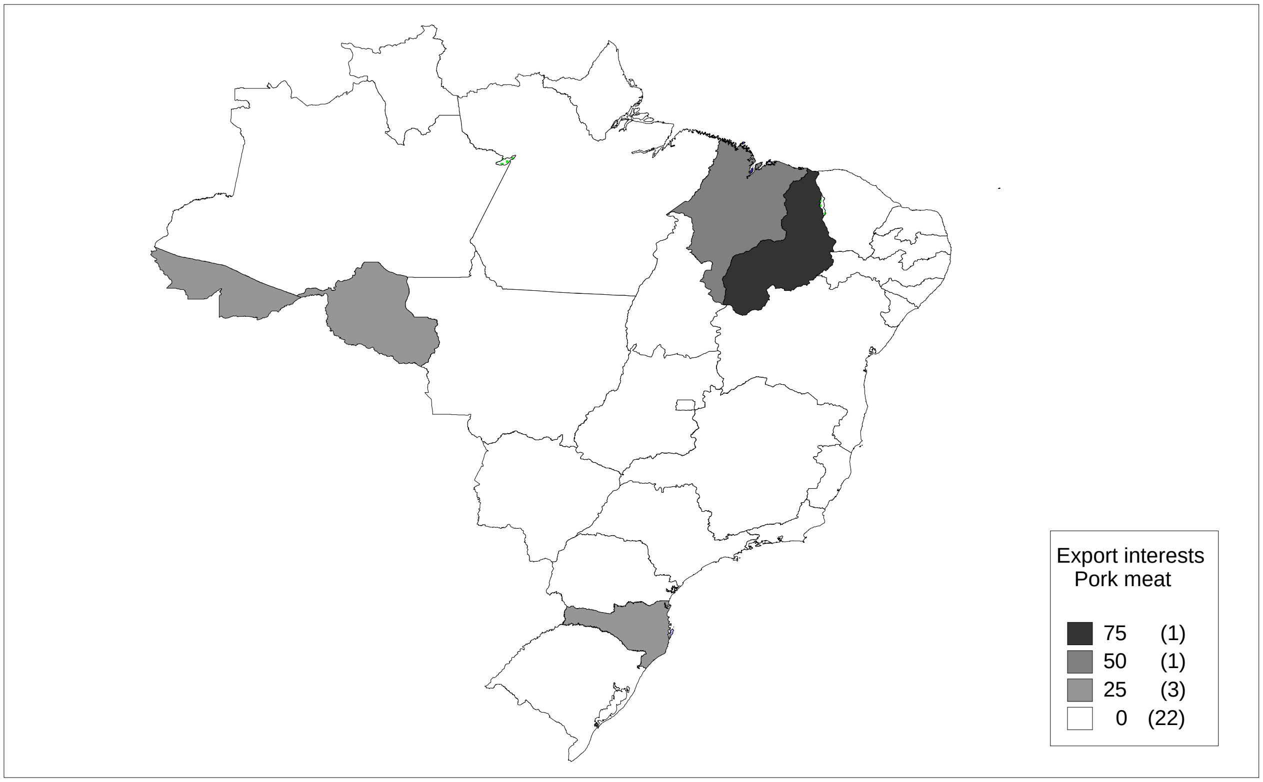


FIGURE 46
BRAZIL EXPORT INTERESTS: SOYBEANS

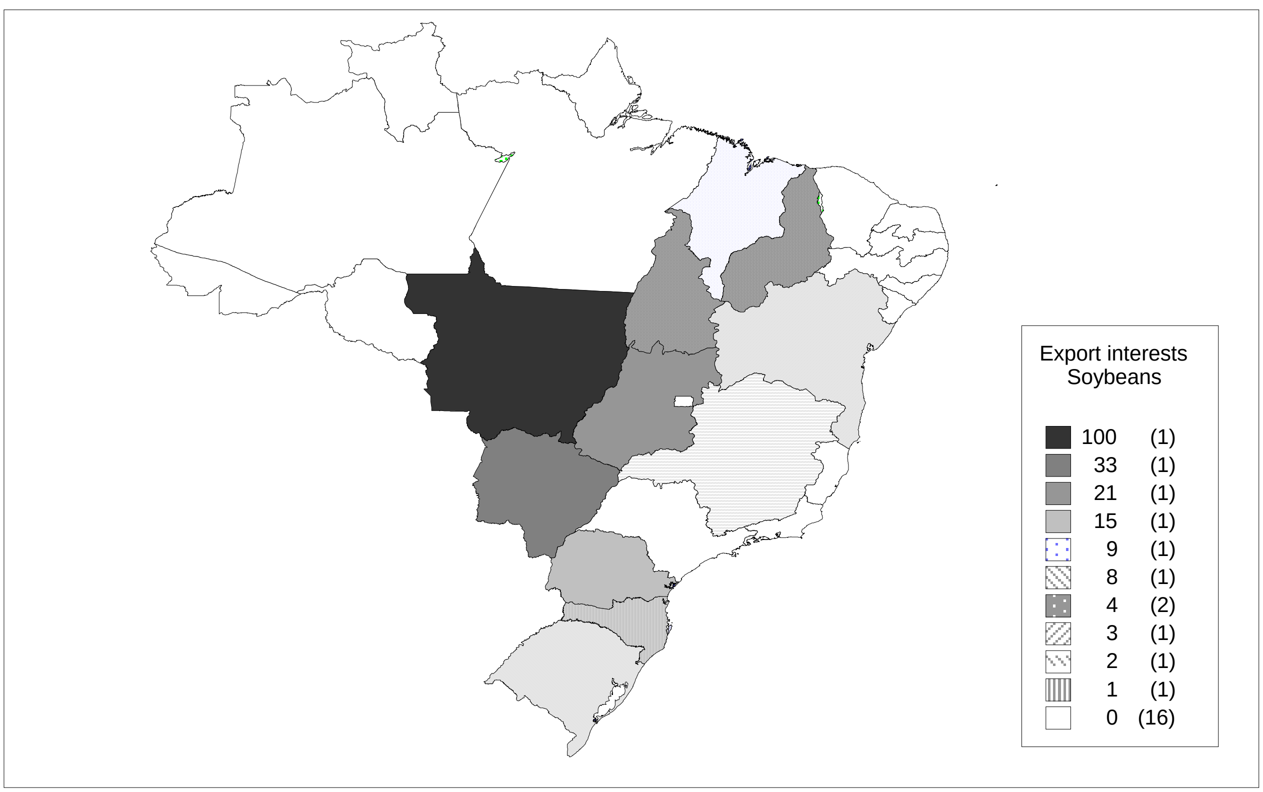
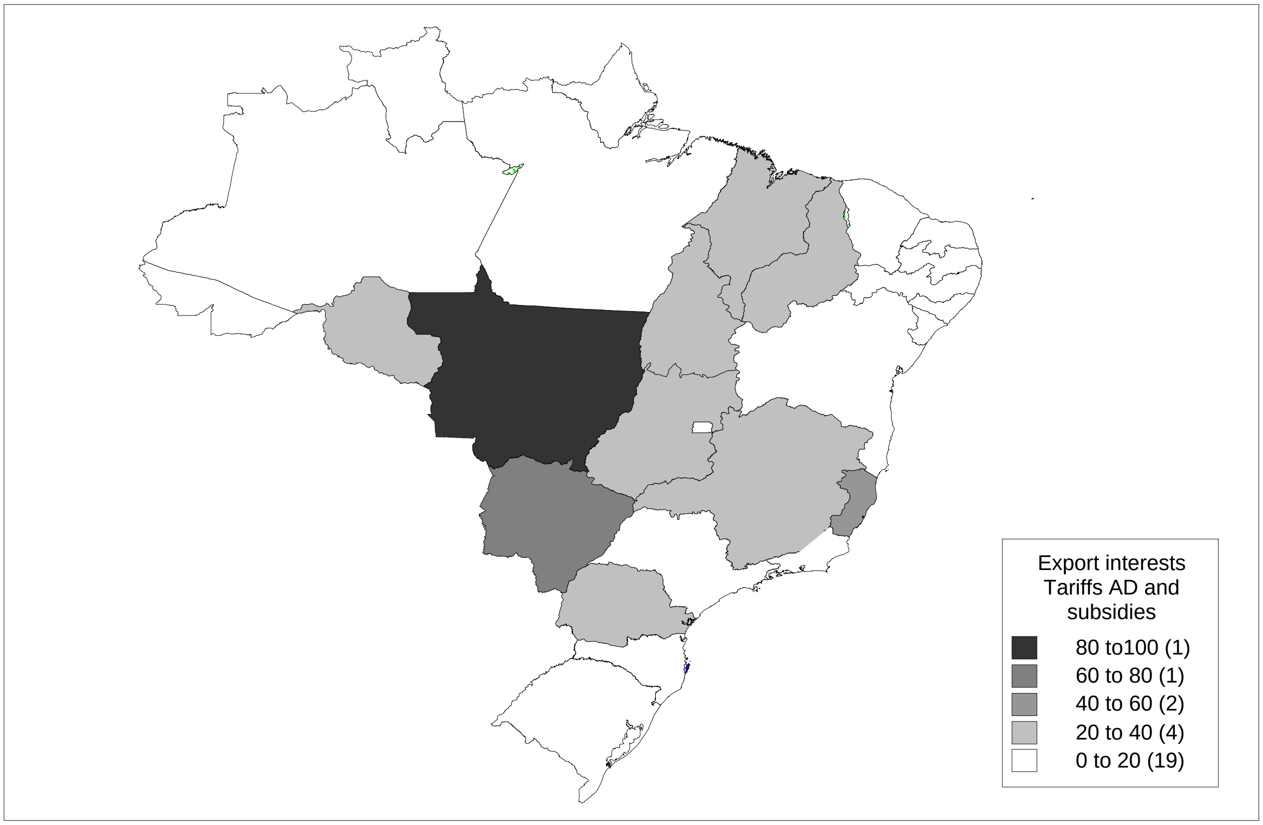


Figure 47
BRAZIL EXPORT INTERESTS: TARIFFS, AD AND SUBSIDIES



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IX. BALANCE OF INTERESTS IN BRAZIL

The indices on protectionist interests for Brazil discussed in section VIII were superimposed to the indices on export interests presented in section IX and the results normalized. The data presented in Table 10 summarize the findings for three alternative measures of export interests taking into account different instruments of protection in the United States: tariff-related protection only; tariff and AD-related; tariff-, AD- and subsidies-related protection. Figures 48 to 50 present the same information graphically.

Amazonas is the extreme case where the balance of interests is against trade liberalization as strong protectionist interests are not compensated by important export interests. In the other extreme are the states in central Brazil and Northern Brazil where the reverse is true: strong export interests are not countered by significant import protectionist interests. If account is taken of protection afforded by antidumping duties to the steel industry in the United States this group is reinforced by Minas Gerais and Espírito Santo, important steel producers.

As data on the balance of interests in Amazonas significantly influence the measurement of such interests in the other states, the last column of Table 10 presents data excluding Amazonas. The same information is presented in Figure 51. As expected, then São Paulo is the state where there is less net interest in the implementation of reciprocal trade liberalization between Brazil and the United States. Interests in favor of trade liberalization remain unchanged.

TABLE 10
BRAZIL: BALANCE OF INTERESTS BETWEEN PROTECTIONIST AND EXPORT INTERESTS

	Tariff protection only	Tariffs & AD	Tariffs, AD & subsidies	Tariff protection excluding Amazonas
Rondônia	72	72	68	50
Acre	56	60	56	25
Amazonas	0	0	0	-
Roraima	58	48	48	27
Pará	56	58	56	25
Amapá	46	48	48	8
Tocantins	74	78	68	53
Maranhão	57	60	60	26
Piauí	56	60	60	25
Ceará	51	54	53	16
Rio Grande do Norte	48	51	51	11
Paraíba	50	54	53	15
Pernambuco	48	50	50	11
Alagoas	50	51	51	11
Sergipe	49	51	51	11
Bahia	51	54	54	8
Minas Gerais	50	68	61	11
Espírito Santo	48	86	71	14
Rio de Janeiro	43	52	49	12
São Paulo	41	45	44	0
Paraná	52	53	56	18
Santa Catarina	50	51	52	14
Rio Grande do Sul	49	53	52	12
Mato Grosso do Sul	86	86	80	74
Mato Grosso	100	100	100	100
Goiás	66	66	66	41
Distrito Federal	46	48	49	9

FIGURE 48
BRAZIL BALANCE OF INTERESTS: PROTECTIONIST VS EXPORT (TARIFF-RELATED) INTERESTS

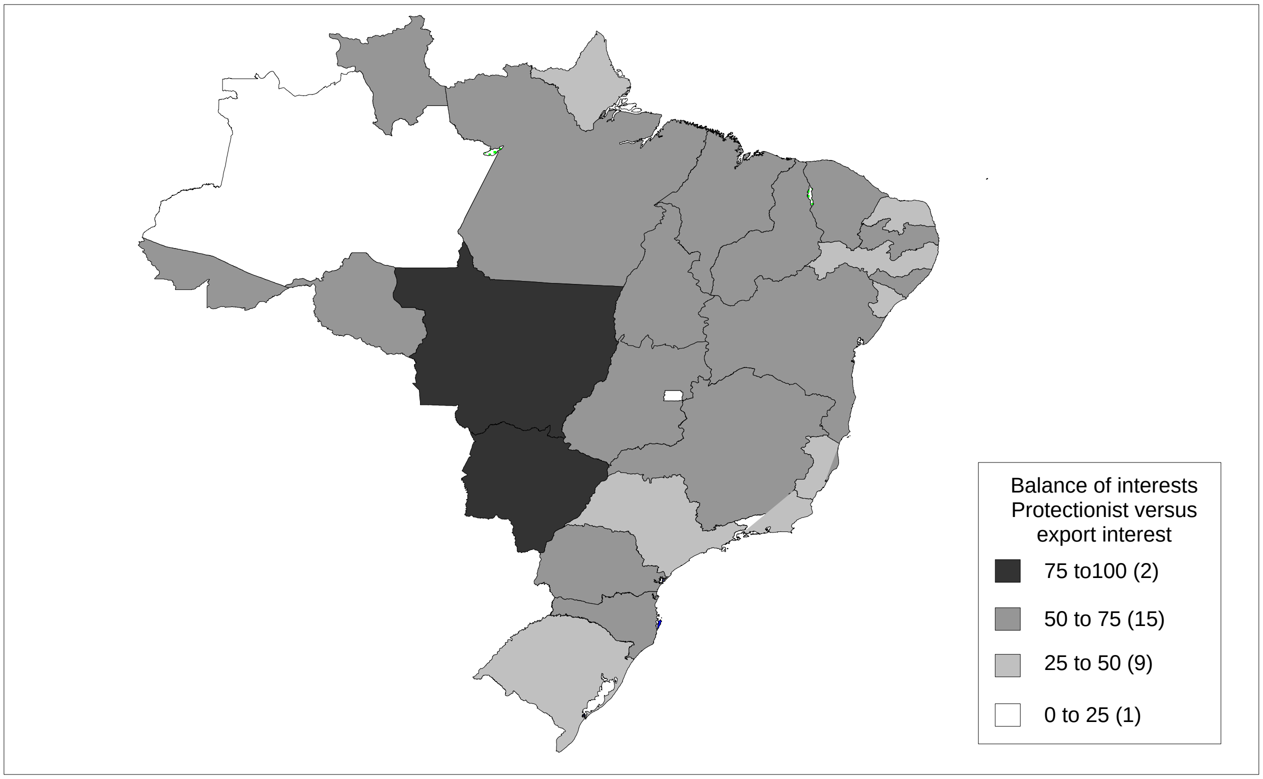


FIGURE 49
BRAZIL BALANCE OF INTERESTS: PROTECTIONIST VERSUS EXPORT (TARIFF- AND AD-RELATED) INTERESTS

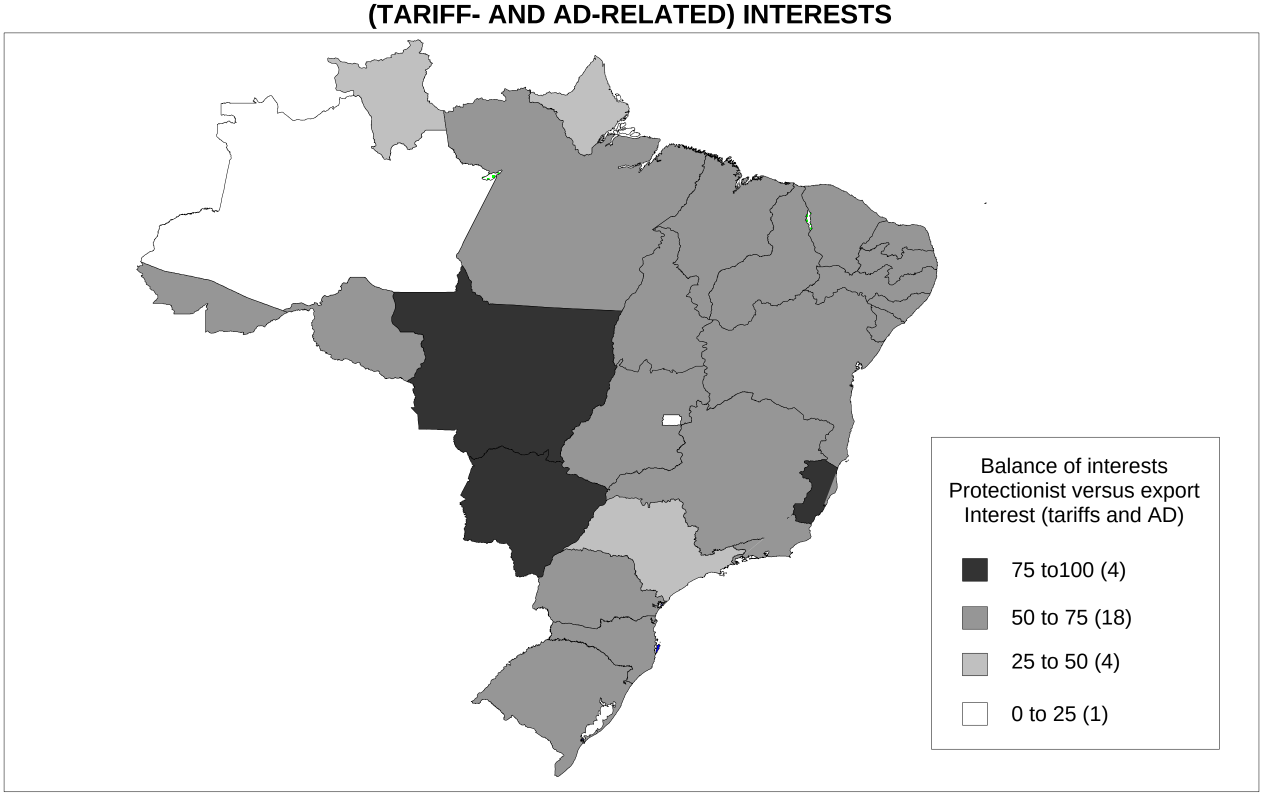


FIGURE 50
BALANCE OF INTERESTS: PROTECTIONIST VERSUS EXPORT (TARIFF- , AD- AND SUBSIDIES RELATED) INTERESTS

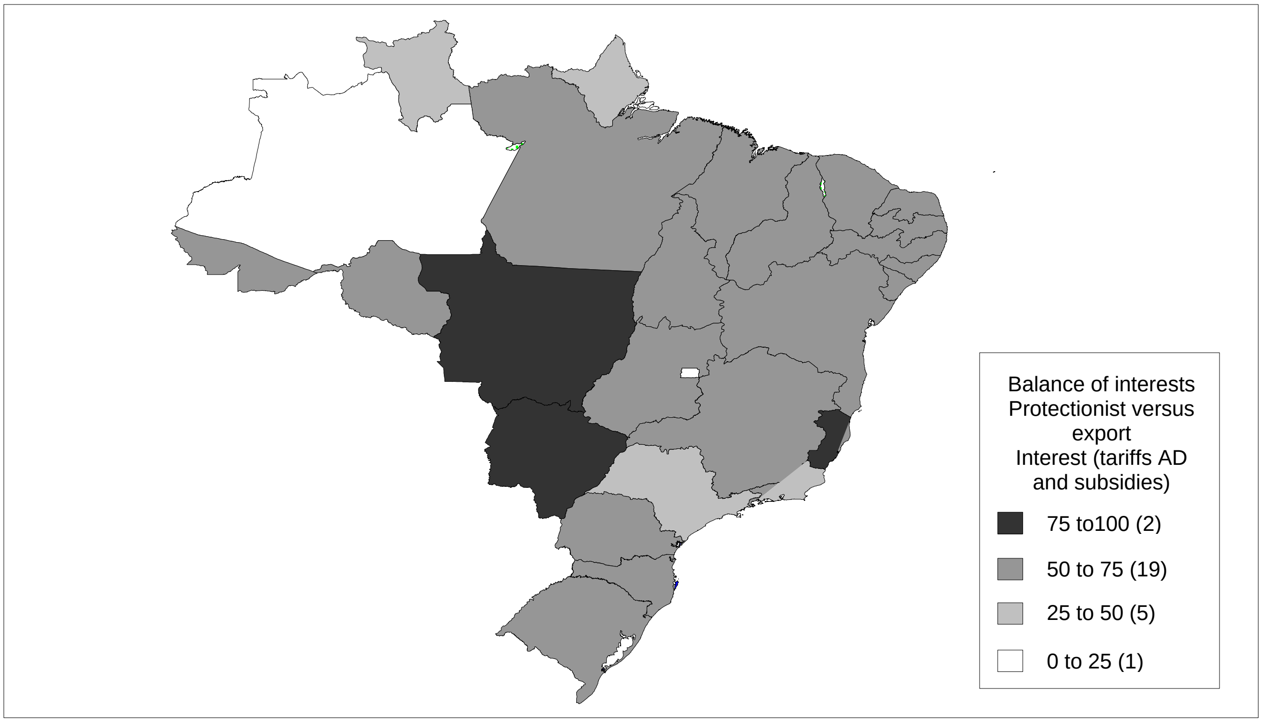
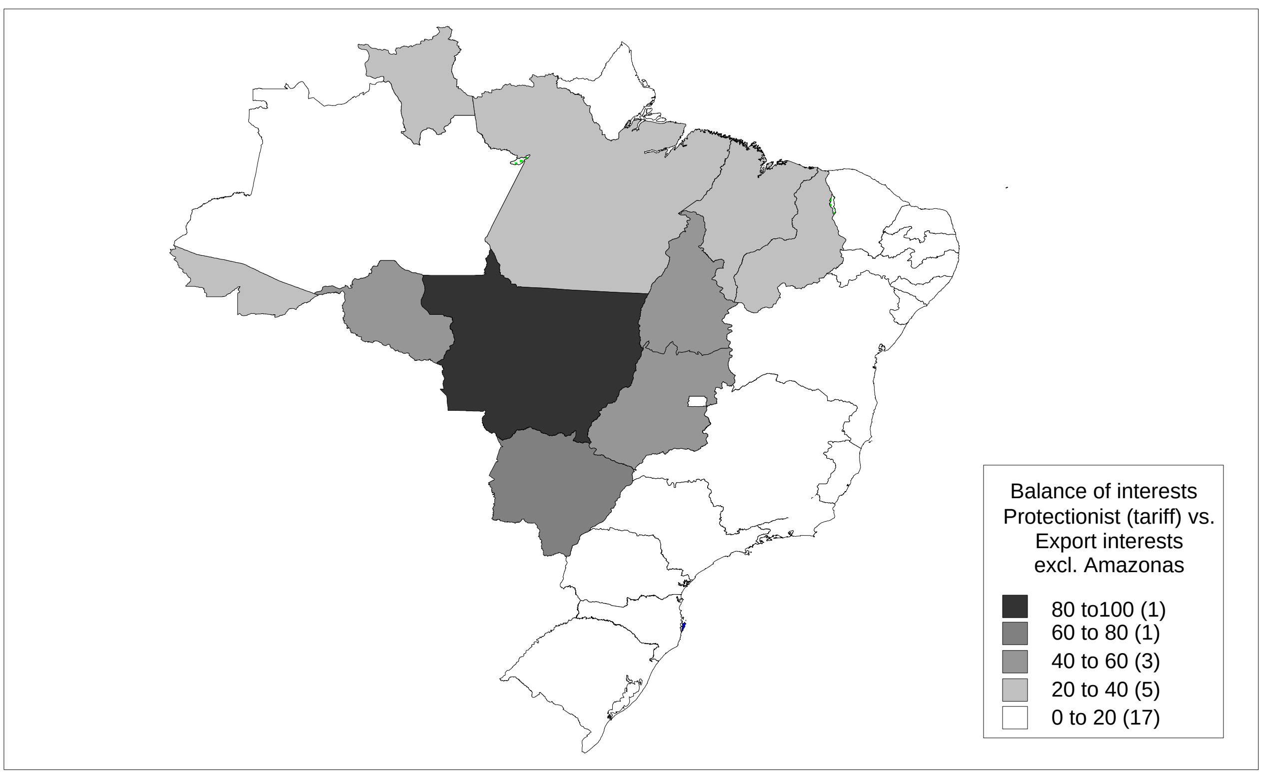


FIGURE 51
BALANCE OF INTERESTS: PROTECTIONIST INTERESTS VERSUS EXPORT (TARIFF-RELATED) INTERESTS EXCLUDING AMAZONAS



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X. CONCLUSIONS

This study provides a framework for the analysis of the domestic distribution of interests involved in trade liberalization from a regional and a sectoral point of view. It shows the balance of interests in Brazil and the US in favor of trade liberalization considering three scenarios: tariff reduction; tariff reduction and removal of antidumping duties; tariff reduction, removal of antidumping duties and end of agricultural domestic support.

There are of course methodological shortcomings in the analysis. Criticisms can be made in relation to the assessment of state and sectoral export interests in the US and protectionist and export interests in Brazil by the distribution of sales or output corrected by size of state GDP. The determination of net interests is by its very nature also fragile and crude as there is no aggregation criterion easy to define. The analysis excludes upstream and downstream activities and so underestimates the retrenchment of protectionist interests. Trade liberalization would also affect the location of agricultural processing facilities. This is a heavily concentrated industry in the United States. Four firms answer for about ¾ of the output in beef slaughter, flour milling, soybean crushing and corn milling. Other relevant agriculture-related activities are also not considered and would be certainly affected by a contraction of agricultural production at least with the present mix: inputs (fertilizers, seeds, tractors), storage, food processing, marketing and sales, transportation. In the case of industrial products no allowances are made to accommodate problems related to rules of origin.

Many of the conclusions referring to protectionist and export interests concerning specific products are spread over the text and are not repeated here. In more general terms interests in favor of trade liberalization in the United States are located mainly in California, some of the Rust Belt states and Texas. This reflects export interests overwhelmingly concentrated in the electronic products including computers and, to a lesser extent, in transport equipment and electrical equipment. Interests against trade liberalization involving tariff protection affect most of the states in the South (especially Mississippi and Arkansas), Illinois, and in parts of the West North Central (Iowa, Dakotas, Nebraska) and the Mountain West (Wyoming, Montana and Idaho). Interests against trade liberalization are also dominant in states where steel production is protected by AD duties (West Virginia, Pennsylvania and most of the Rust Belt). Some industrial products are also protected by tariffs (footwear and trucks), but steel products protected by AD legislation are much more important. These are also the regions where eventual reconversion programs involving land and manpower - and other possible side payments - should be concentrated.

In Brazil, trade liberalization interests are heavily concentrated in the agricultural Central West. Interests against trade liberalization are located in Amazonas - the Free Zone of Manaus - and, to a lesser extent in São Paulo, Rio de Janeiro and Rio Grande do Sul, if the focus is on tariff protection in the United States. If the focus expands to include AD and agricultural subsidies, net interests in favor of trade liberalization tend to be much weaker in Amazonas and São Paulo, and to a lesser extent Rio de Janeiro, than in all other states.

The number of lower house representatives likely to defend protectionist policy stances in Brazil and in the United States is not dissimilar. If anything, the number of deputados in Brazil directly concerned with protectionism, mainly in Amazonas and São Paulo (78 out of 512) is likely to be proportionately less important than in the United States where it may vary between one quarter and one third out of 435 representatives depending on the ambition of the trade liberalization proposed. But the political weight of São Paulo goes much beyond its share of representatives in the lower house as well indicated by last three presidential elections in Brazil.

There are important contrasts between Brazil and the United States to be taken into account. These tend to favor trade liberalization interests in Brazil rather than in the United States. Protectionist interests in the United States are concentrated in a relatively large number of states while export interests affect a small number of states with a large population. There is consequently a relatively large number of senators who tend not to favor dismantling protection. In Brazil what happens is the reverse: there are several states with a rather low population keenly interested in the opening up of export markets in the United States while the number of states where there is likely to be strong commitment to protectionism is relatively small. The same is true of the lower houses. The Brazilian legislation of assuring a minimum representation of eight deputados for each state contributes to overrepresentation of the states where export interests are concentrated. Similarly, the cap of a maximum number of 70 deputados weakens the representation of São Paulo which is the one likely to be more interested in defending the protectionist interests. The electoral legislation in the US tends to introduce a bias in favor of protectionism, given the concentration of Brazil’s export interests in agricultural and steel products, while the reverse is true in Brazil.

Cross border coalitions in favor of trade liberalization would ideally concentrate on the focus of favorable net interests in both economies. In a stylized vision: California electronics and Brazilian Central West efficient agriculture. The stylized mirror image of entrenched protectionist interests in both economies would include the inefficient agricultural and steel producers - South, West North Central, Mountain West, Illinois and Pennsylvania - in the United States and, in the other side, Amazonas and São Paulo in Brazil.

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ANNEX 1

CRITERIA TO INCLUDE SPECIFIC US STATES AS RELEVANT PRODUCERS OF SELECTED PRODUCTS

	Leading producing counties	Number of leading states	Remarks
Tobacco	100 (72.1%)	20 (98.1%)	1 county (St Mary's, MD) in the list of leading counties but not in the list of leading states.
Cotton	100 (70.4%)	10 (91.6%)	4 counties (Orangeburg, SC; Jackson, OK; Monroe, AL; Southampton, VA) in the list of leading counties but not in the list of leading states.
Oranges	50 (100%) 2	2 (99.0%)	Many counties in California (oranges not for juice) and some in other states (also not for juice) in the list of leading counties but not in the list of leading states. But only Florida oranges are relevant for juice.
Corn	100 (28.4%)	20 (95.6%)	
Sugar beet	50 (84.0%)	10 (97.1%)	1 county (Malheur, OR) in the list of leading counties but not in the list of leading states.
Sugar cane	19 (96.4%)	4 (99.9%)	Only counties with more than 1% of US output included (1 TX;2 HW; 3 FLA; 13 parishes in LA).
Beef	100 (32.7%)	20 (83.2%)	Cattle and calves sold
Poultry	100 (65%)	20 (98.1%)	4 counties (Grant, WA; Yakima, WA: Sioux, IA; Malheur, OR) in the list of leading counties but not
Footwear		7 (60.3%)	Estimated sales based on estimated number of paid employees (middle of intervals) NAICS 31621 (Footwear manufacturing)
Heavy trucks		9 (83.5%)	Estimated sales based on estimated number of paid employees (middle of intervals) NAICS 336120 (heavy duty truck manufacturing). States where output was more than 5% of US output selected. All counties identified in the Economic Census were selected.
Steel products		7 (74%)	Estimated sales based on estimated number of paid employees (middle of intervals) NAICS 331111 (Iron and steel mills).States where output was more than 5% of US output selected. All counties identified in the Economic Census were selected.
Pork meat	100 (50%)	20 (96.1%)	Hogs and pigs other than feeder pigs sold
Soybeans	100 (27.3%)	20 (97.1%)	

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ANNEX 2

Methodological remarks

US protectionist interests

1. Selection of products: Brazilian exports (5 or 6 digits HS) to the world above US$ 50 million in 2001 WITS (World Bank) facing tariff peaks in the United States US ITC (more than 15%).

2. Object of antidumping measures: WTO, ITC, Brazilian Embassy Washington.

3. Markets distorted by US subsidies: Jank [2003].

4. Determination based on Agricultural Census 1997 in which counties (50 or 100) in the main producing states (up to 20) sales of the products exceeded 10% of industrial sales. Economic Census 1997 for states where sales exceeded 5% of US total. These were deemed to be counties were protectionist interests were strong.

5. All congressional districts which contained in 1997 a county or part of a county with protectionist interests were deemed to be “protectionist”.

6. Indices of protection reflect the share of protectionist CDs in total CDS.

7. These indices by product were aggregated avoiding double counting, that is CDs which were classified as protectionist based in more than one product were counted just once.

8. Three aggregates were generated including, respectively, tariff protection (T); tariffs and antidumping (TAD); tariffs, antidumping and products affected by subsidies (TADS).

US export interests

1. Products included: those at the 6-digit HS which faced tariff peaks of more than 15% in Mercosur (FTAA data base) and whose US exports to the world exceeded US 1 billion in 2001 (US DOC).

2. Identification of states where share of sales in total US sales exceed 10%. US exports in 2001 were distributed by state according the shares of sales by state in the 1997 Economic Census (NAICS 5 digit)

3. Both at the product level and for all exports data were normalized by the size of the economy of each state. A 0-100 range normalization was undertaken.

US balance of interests

1. The vector of protectionist interests was subtracted from the vector of export interests and the result normalized to 0-100 range.

Brazil

Protectionist interests in Brazil

1. Products as in US exports.
2. State distribution of output of relevant products (3-digit)
3. Normalization for state size.
4. Aggregation for all products weighted by composition of US exports to all destinations 2001.
5. Number 4 above also normalized for the 0-100 range.

Export interests in Brazil

1. Products as in US imports.
2. Shares of states in output corrected by size of state GDP.
3. Three vectors of export interests were generated: T, TAD and TADS, as defined above for the US.
4. Aggregates (T, TAD, TADS) weighted by shares in US sales

Balance of interests in Brazil

1. The vector of protectionist interests was subtracted from the vectors of export interests (T, TAD and TADS) and the results normalized to 0-100 range.

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