



**BID**

# **Seminário Brasil 2020**

***Tendências Mundiais e Regionais: Horizonte 2020***

**Otaviano Canuto**

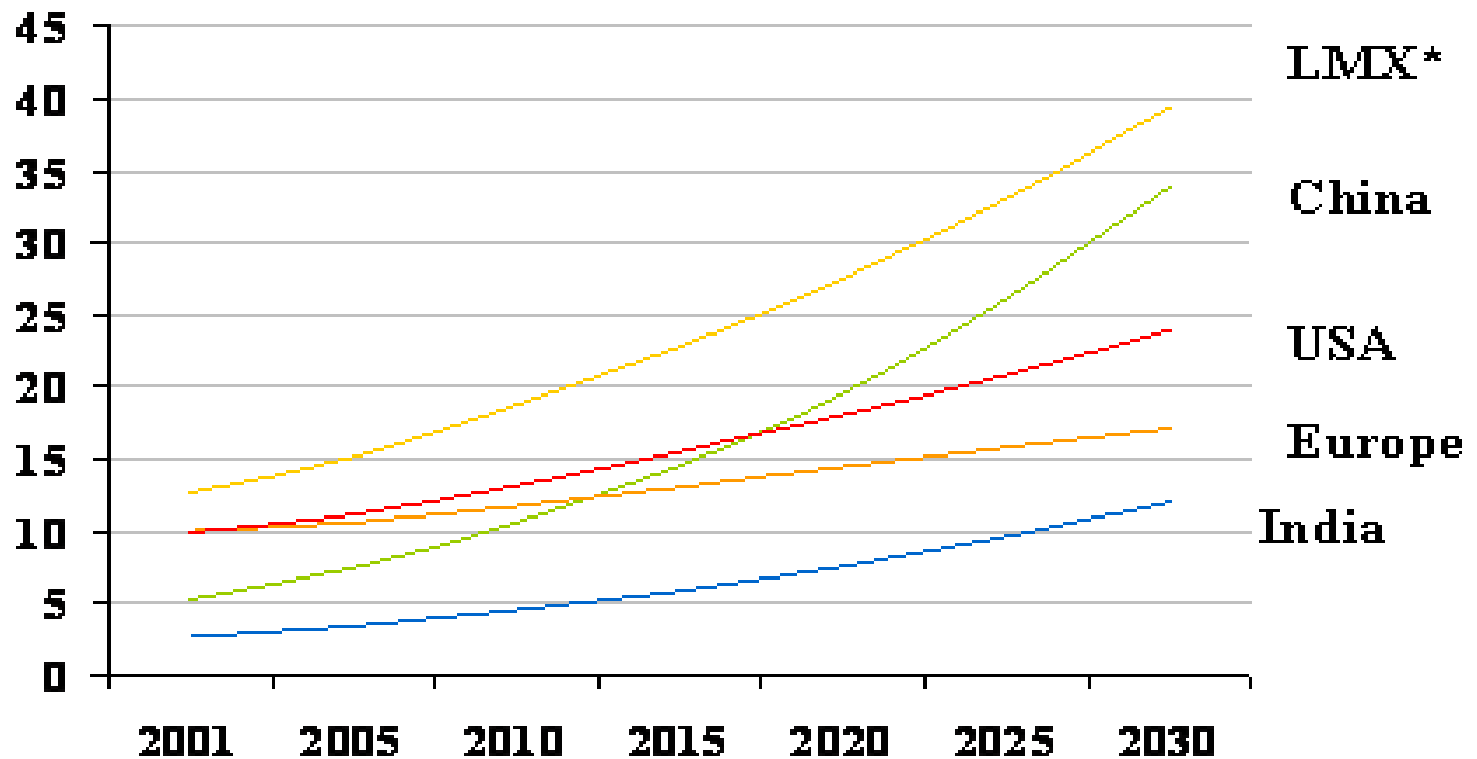
**Vice Presidente**

**Banco Interamericano de Desenvolvimento**

**USP, 03 de Março de 2008**

# PIB – Taxas de câmbio ajustadas pelo Poder de Paridade de Compra

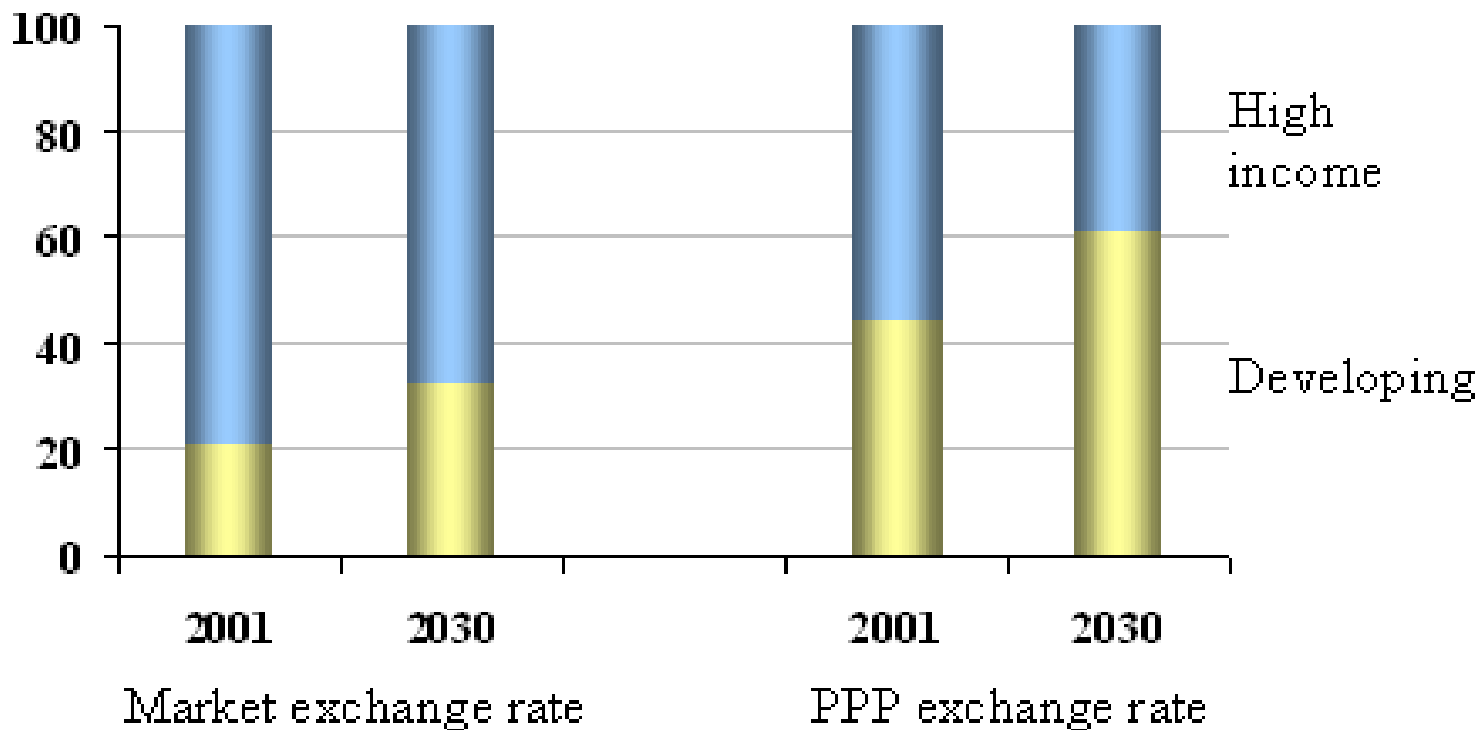
\$2001 trillion



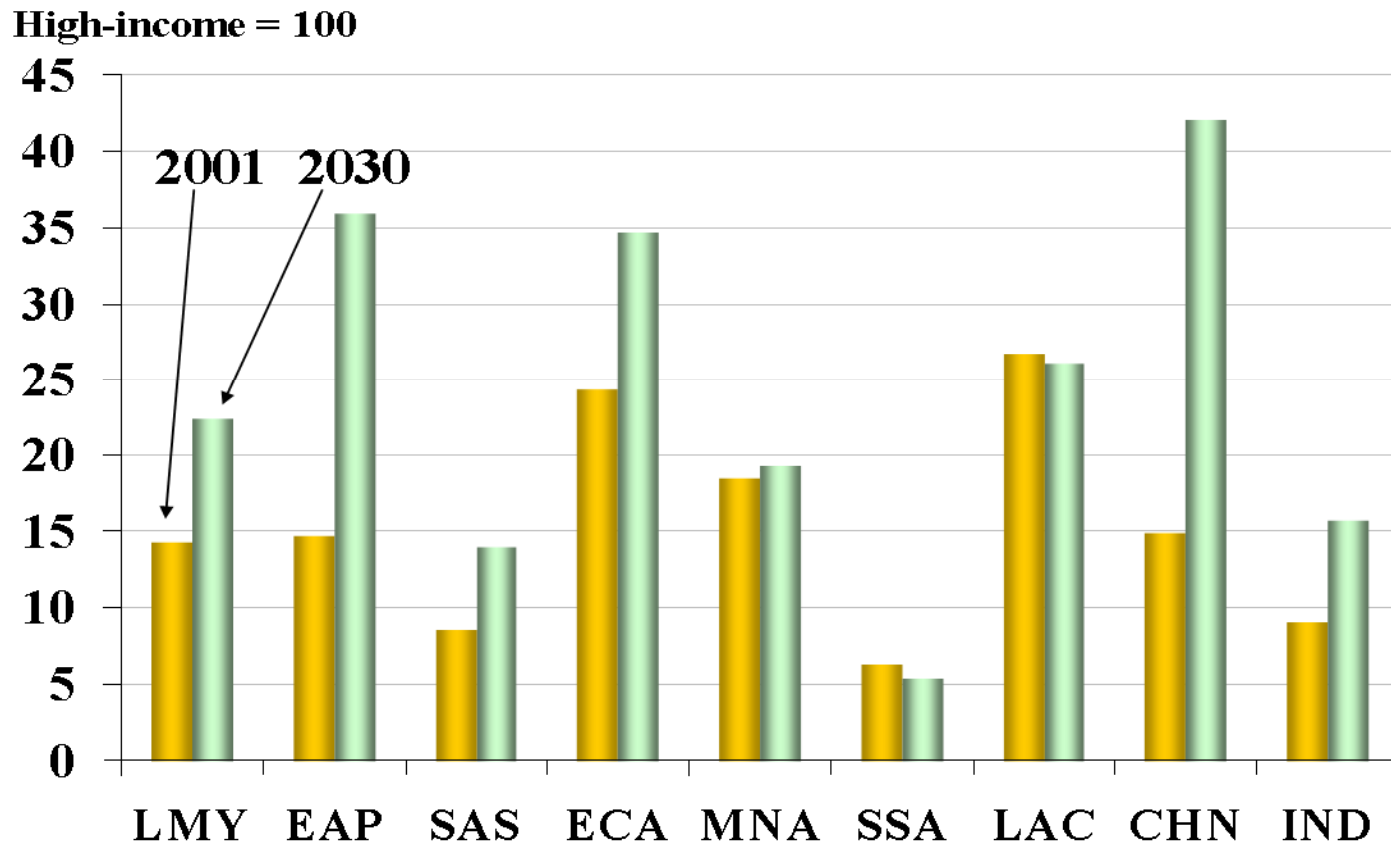
LMX\* = Developing countries excluding India and China

# Distribuição do PIB mundial

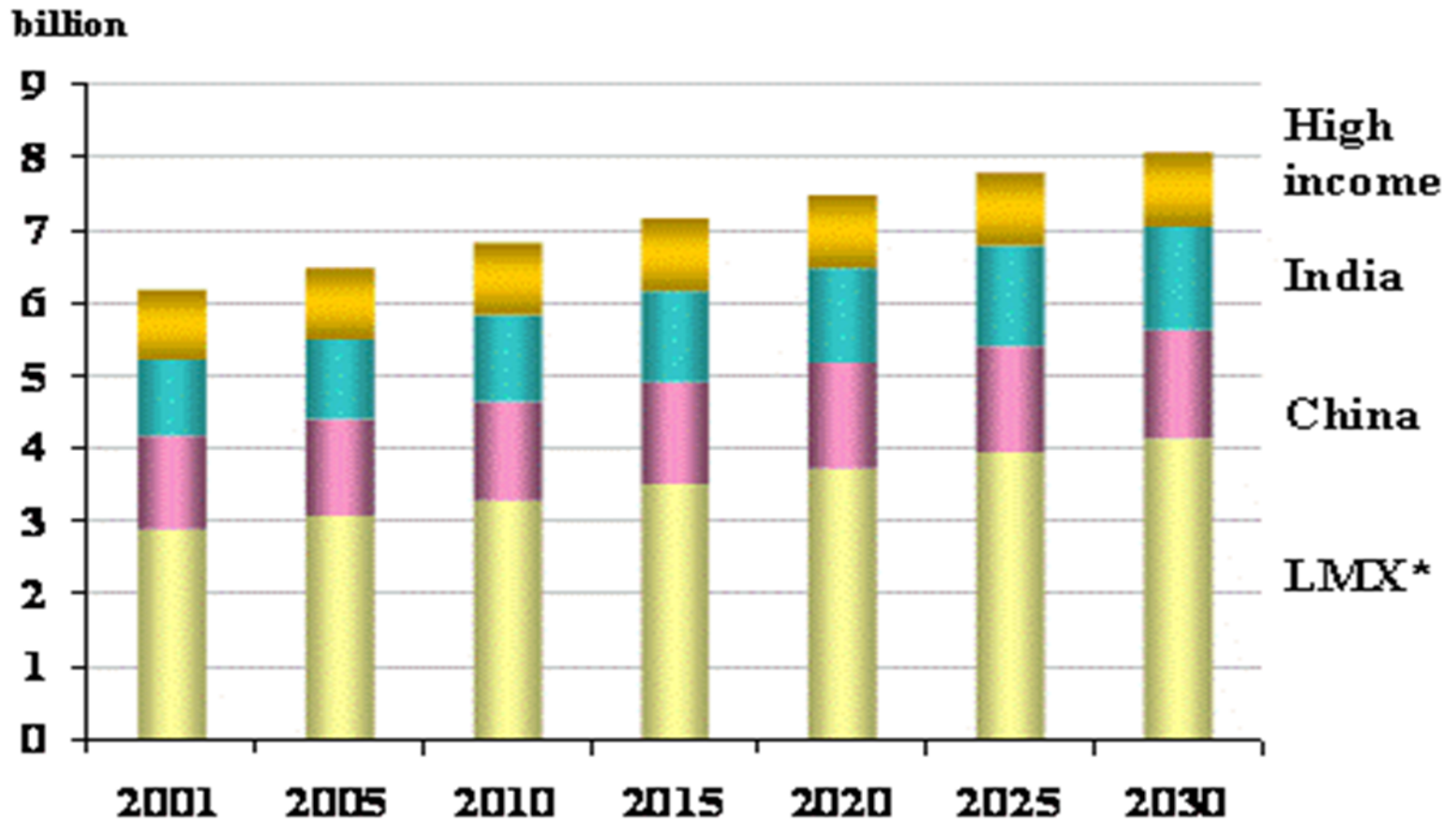
Percent of world total



# Renda Per Capita (RPC) como % da RPC dos Países industrializados (critério PPP)

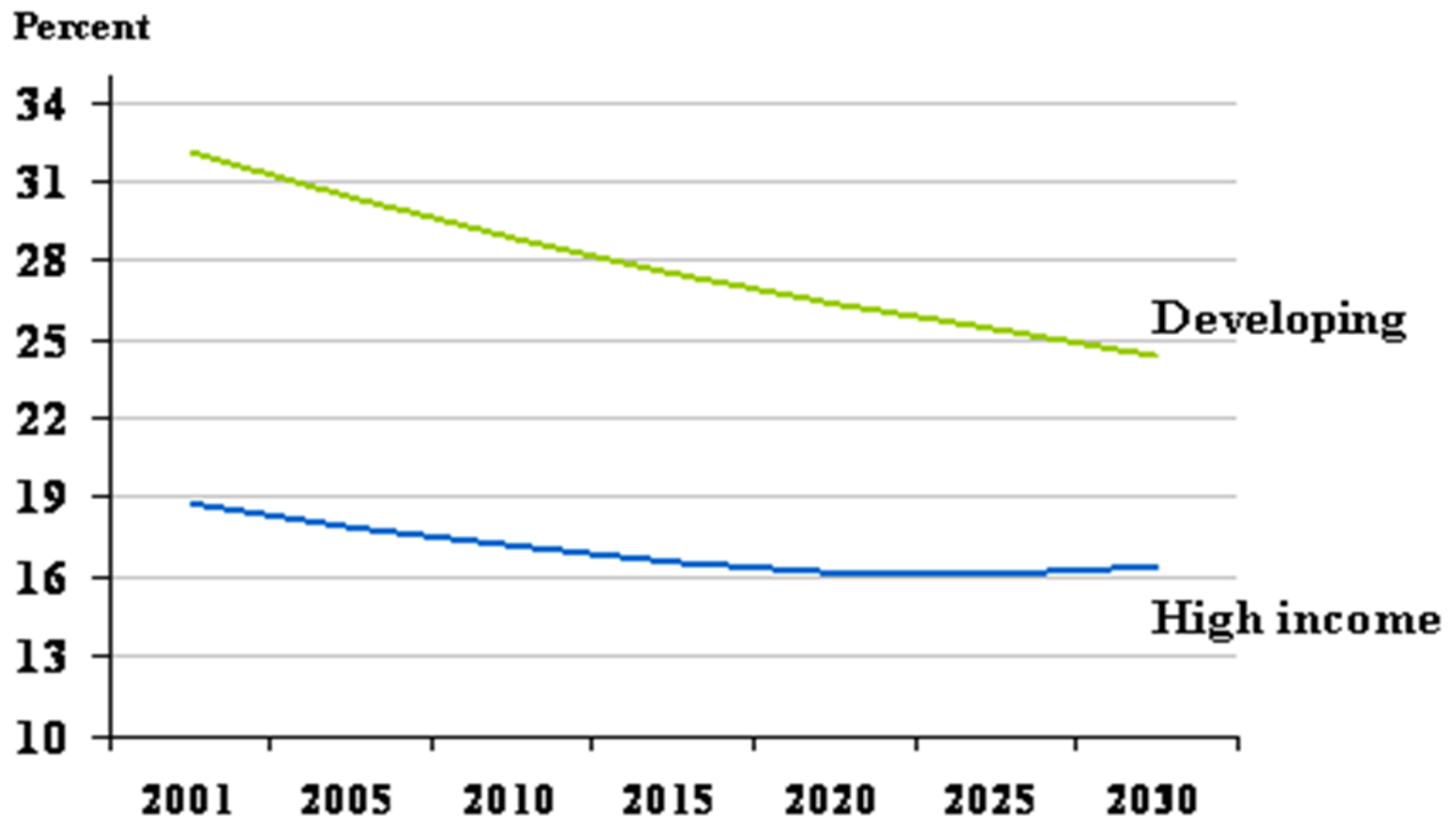


# População 2001-2030

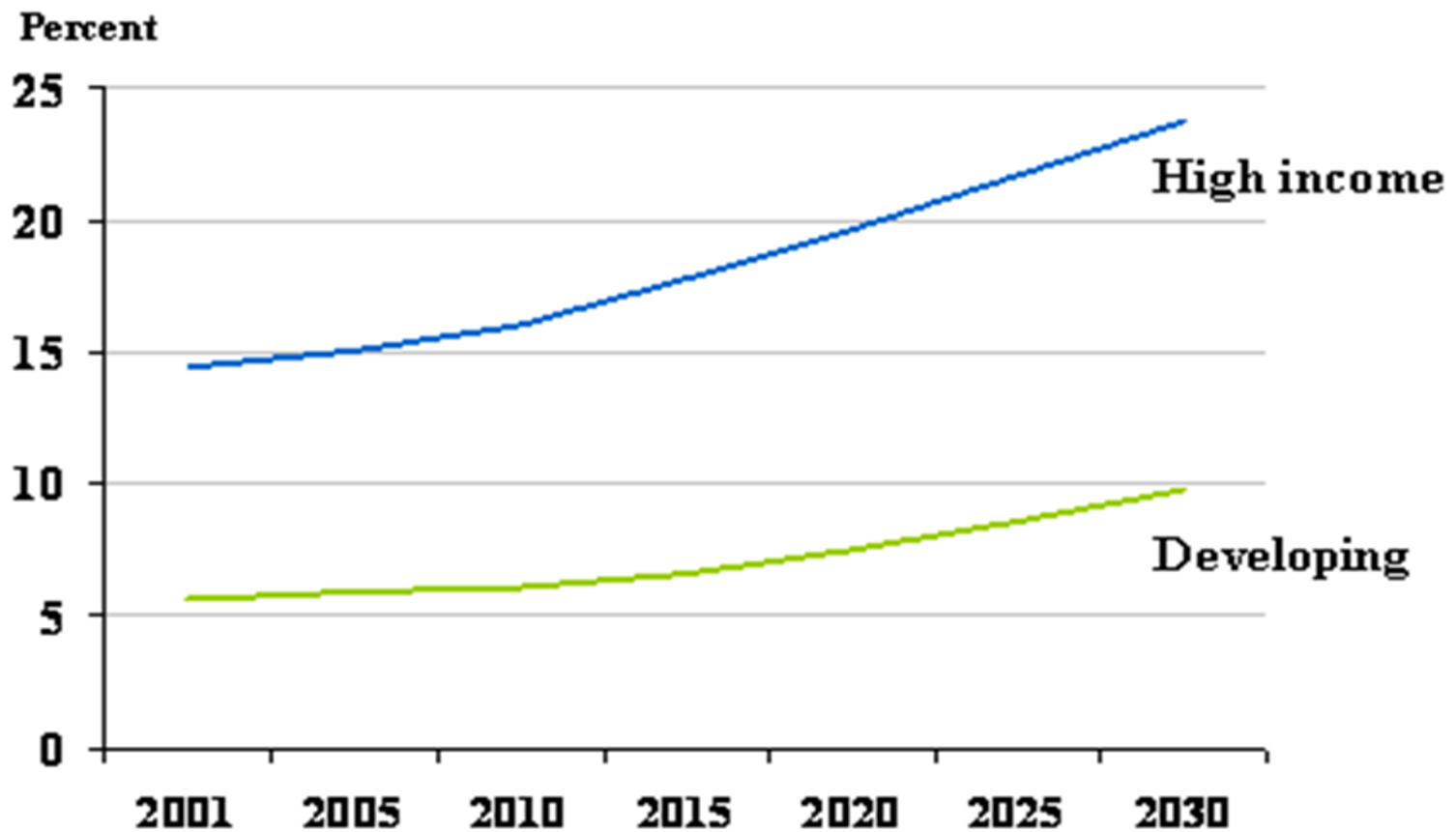


LMX\* = Developing countries excluding India and China

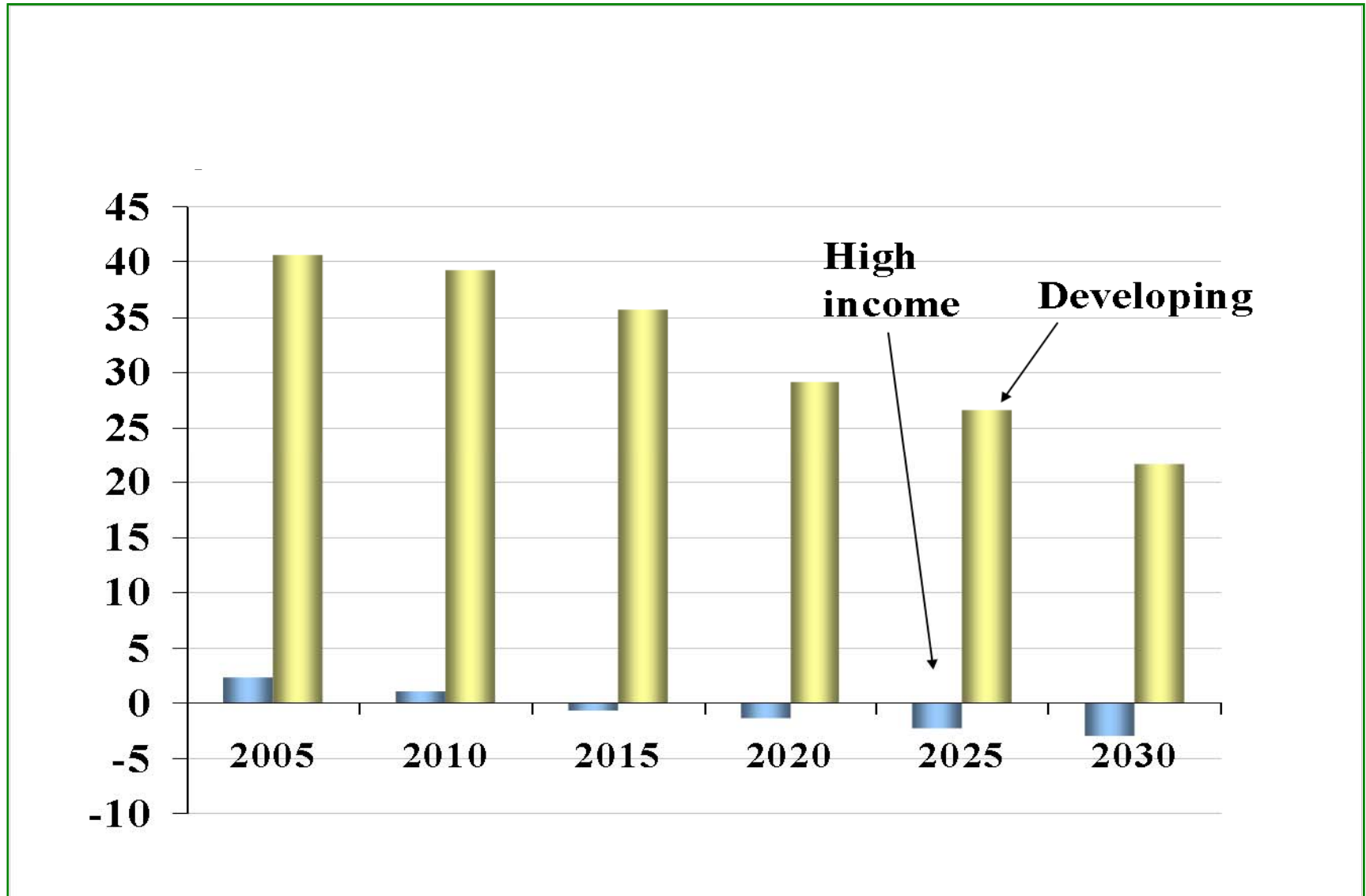
# Parcela da população = & < de 15 anos de idade



# Parcela da população = & > de 65 anos de idade



# Aumento anual médio da força de trabalho em milhões de hab.

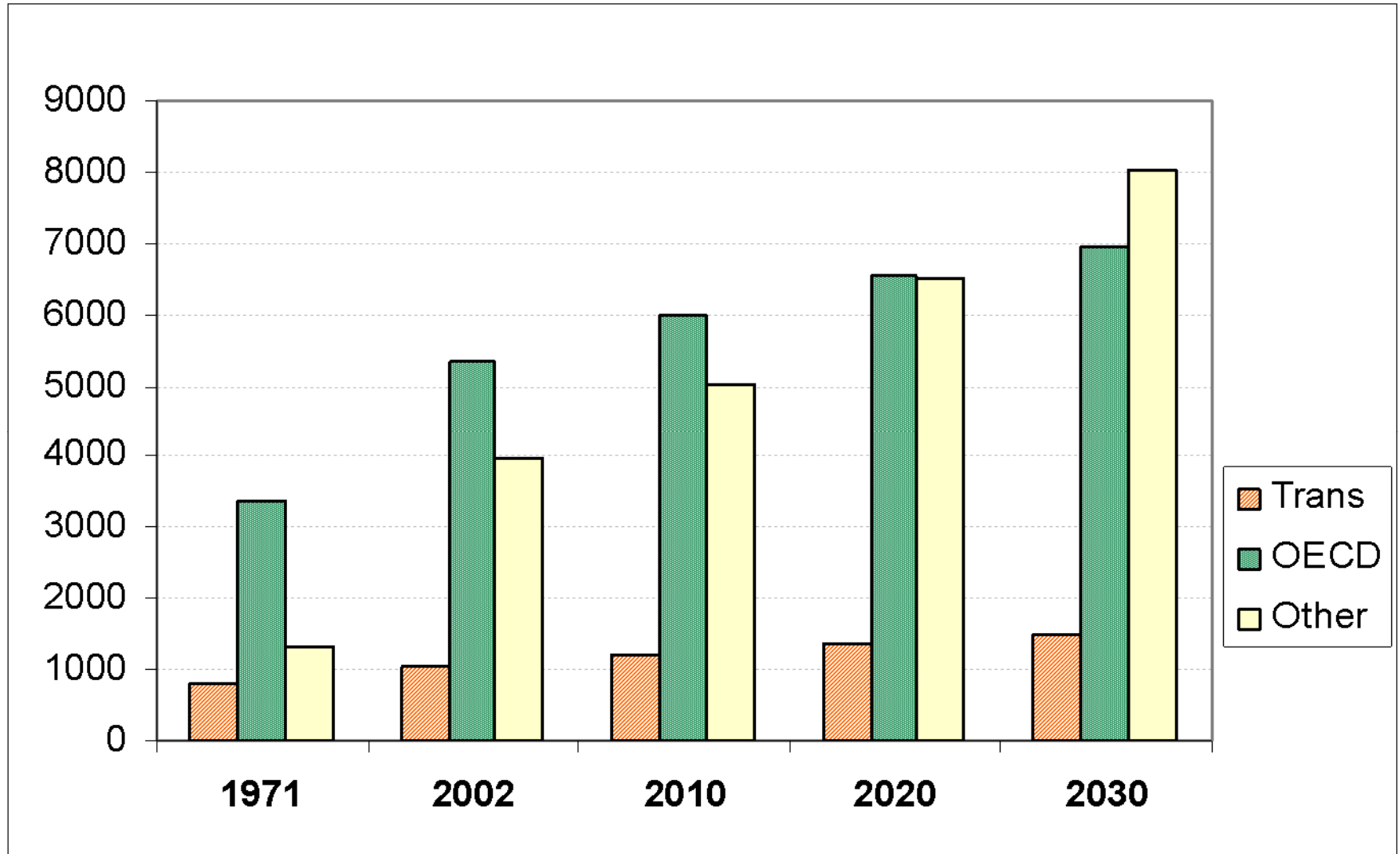




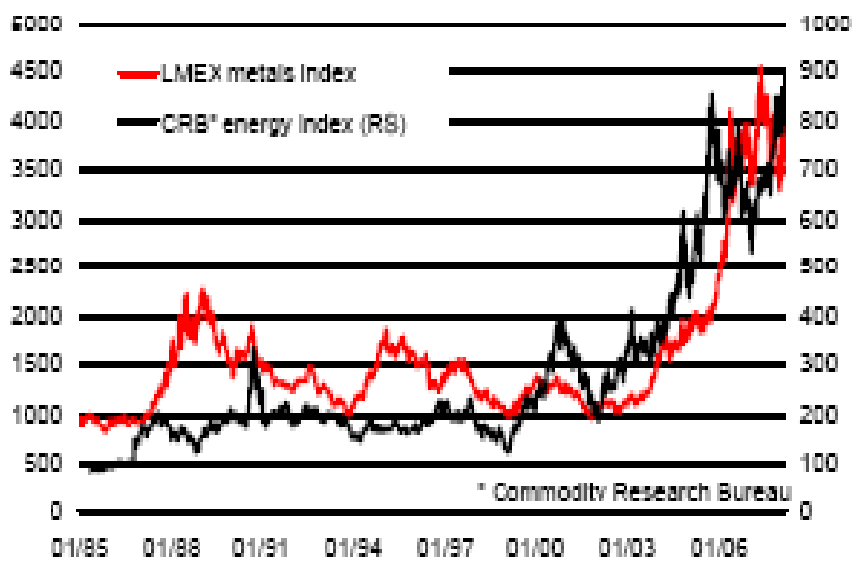
# Percentual da população vivendo com US\$ 1 ao dia

	<i>1990</i>	<i>2001</i>	<i>2015</i>	<i>2030</i>
<b>Leste da Ásia &amp; Pacífico</b>	<b>29.4</b>	<b>15.1</b>	<b>1.3</b>	<b>0.2</b>
<b>China</b>	<b>31.5</b>	<b>16.6</b>	<b>1.4</b>	<b>0.2</b>
<b>Europa &amp; Ásia Central</b>	<b>1.4</b>	<b>3.6</b>	<b>1.3</b>	<b>0.6</b>
<b>América Latina &amp; Caribe</b>	<b>11.0</b>	<b>9.5</b>	<b>4.9</b>	<b>2.2</b>
<b>Oriente Médio e Norte da África</b>	<b>2.1</b>	<b>2.4</b>	<b>0.9</b>	<b>0.3</b>
<b>Sul da Ásia</b>	<b>41.5</b>	<b>31.3</b>	<b>14.0</b>	<b>6.5</b>
<b>África Sub-Saariana</b>	<b>47.4</b>	<b>46.4</b>	<b>36.9</b>	<b>28.7</b>
<b>RENDA MÉDIA E BAIXA</b>	<b>28.3</b>	<b>21.2</b>	<b>10.5</b>	<b>6.9</b>

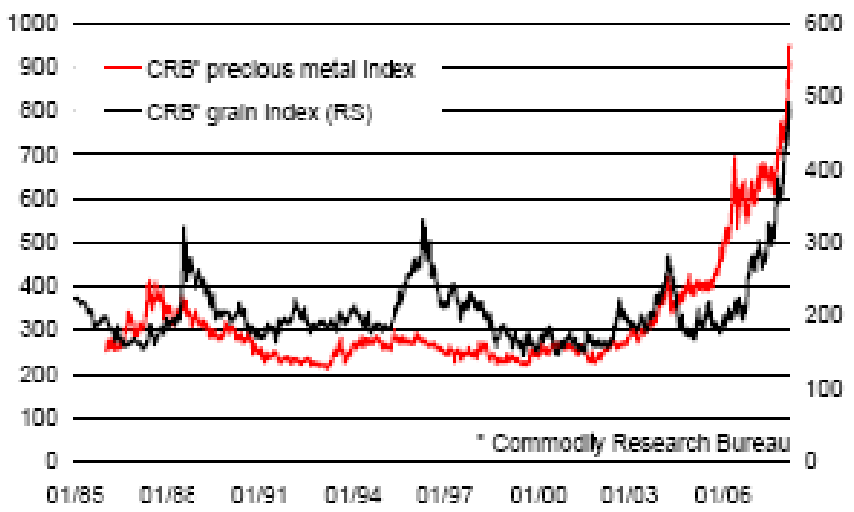
# Demanda mundial de energia (mtoe)



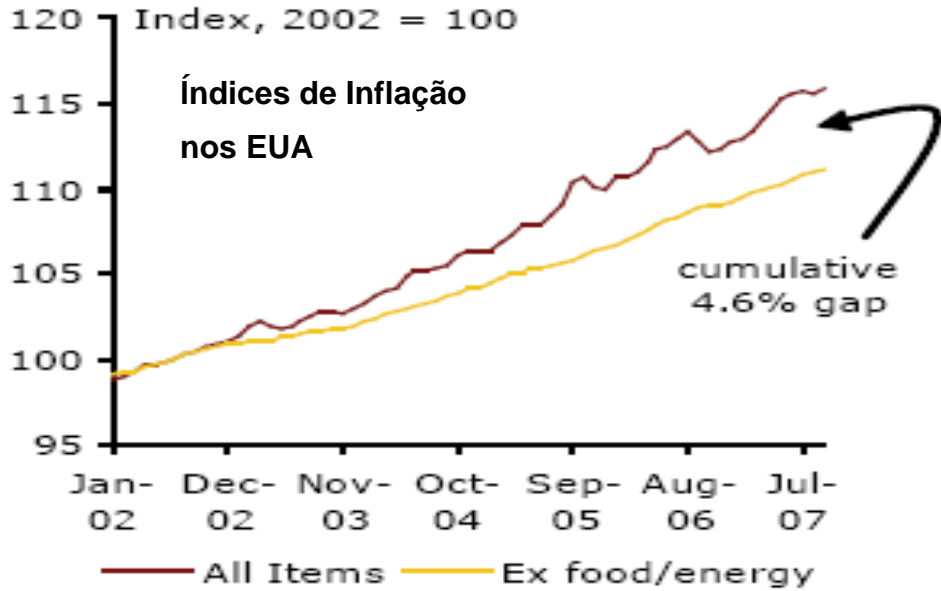
**SECTOR ROTATION: FROM ENERGY & BASE METALS ...**



**... INTO PRECIOUS METALS & AGRICULTURAL SECTORS**



Source: Thomson Datastream, UniCredit Global Research



**Preços de Commodities (inclusive agrícolas) tendem a permanecer elevados.**

# China e Commodities Globais

	2002	2003	2004	2005	2006	2007
<b>Steel</b>						
% share of global demand	22.5	26.4	28.0	31.4	35.3	36.8
% share of global growth	76.4	78.9	41.6	81.7	105.7	68.8
China's demand/supply ratio	1.11	1.14	1.05	1.02	0.92	0.89
<b>Iron ore</b>						
% share of global demand	31.2	33.8	38.3	45.0	50.0	53.3
% share of global growth	67.1	60.7	75.4	107.1	86.1	71.2
China's demand/supply ratio	1.48	1.56	1.67	1.73	1.6	1.7
<b>Aluminum</b>						
% share of global demand	16.6	18.7	19.8	21.3	25.4	31.3
% share of global growth	-	44.7	32.7	57.3	69.4	85.2
China's demand/supply ratio	-	0.86	0.88	0.89	0.9	1.0
<b>Primary nickel</b>						
% share of global demand	8.3	10.8	11.3	12.2	18.9	21.6
% share of global growth	-	47.9	33.7	34.0	56.8	94.0
China's demand/supply ratio	1.86	2.00	2.00	1.71	2.4	2.7
<b>Copper</b>						
% share of global demand	17.0	19.8	21.1	22.7	22.7	24.6
% share of global growth	-	116.6	40.4	61.8	26.9	67.9
China's demand/supply ratio	3.93	4.56	5.01	5.43	-	4.7
<b>Coal</b>						
% share of global demand	27.5	27.3	27.3	28.1	28.6	NA
% share of global growth	70.9	14.1	27.6	102.8	43.3	NA
China's demand/supply ratio	0.96	0.95	0.95	0.96	0.96	1.00
<b>Oil</b>						
% share of global demand	6.9	7.3	8.2	8.2	8.6	8.7
% share of global growth	51.9	31.8	33.7	31.2	51.9	30.0
China's demand/supply ratio	1.48	1.57	1.77	1.86	1.95	1.97

# Evolução da Dieta de Consumo de Baixa Renda

**Table 1—China: Per capita annual household consumption**

Product	Urban			Rural		
	1990 (kg)	2006 (kg)	2006/1990 ratio	1990 (kg)	2006 (kg)	2006/1990 ratio
Grain	131	76	0.6	262	206	0.8
Pork, beef, and mutton	22	24	1.1	11	17	1.5
Poultry	3	8	2.4	1	4	2.8
Milk	5	18	4.0	1	3	2.9
Fish and aquatic products	8	13	1.7	2	5	2.4
Fruits	41	60	1.5	6	19	3.2

SOURCE: Data from National Bureau of Statistics of China 2007a and 2007b.

**Table 2—Change in food-consumption quantity, ratios 2005/1990**

Type	India	China	Brazil	Kenya	Nigeria
Cereals	1.0	0.8	1.2	1.1	1.0
Oil crops	1.7	2.4	1.1	0.8	1.1
Meat	1.2	2.4	1.7	0.9	1.0
Milk	1.2	3.0	1.2	0.9	1.3
Fish	1.2	2.3	0.9	0.4	0.8
Fruits	1.3	3.5	0.8	1.0	1.1
Vegetables	1.3	2.9	1.3	1.0	1.3

SOURCE: Data from FAO 2007a.

# Mudanças Climáticas : fonte de incertezas e oportunidades

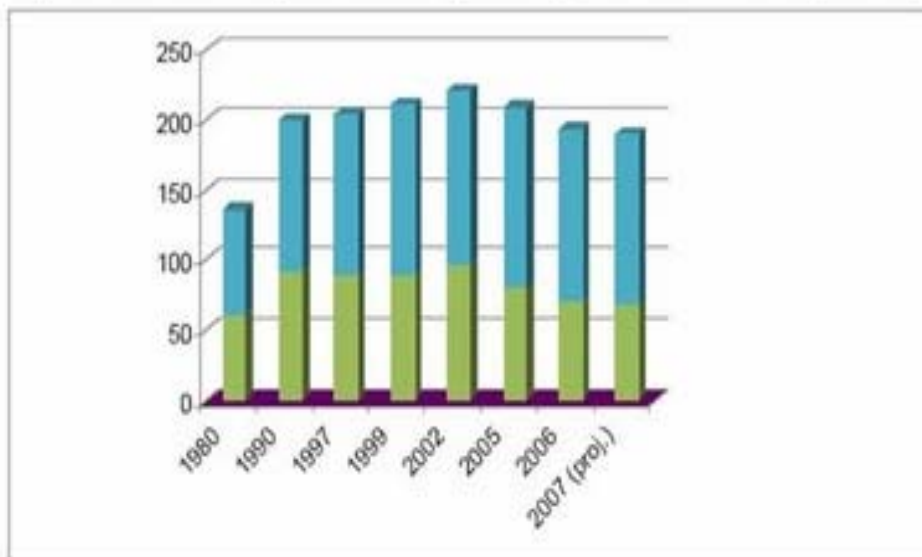
**Table 3—Expected impacts of climate change on global cereal production**

<b>Region</b>	<b>1990–2080 (% change)</b>
<b>World</b>	<b>-0.6 to -0.9</b>
<b>Developed countries</b>	<b>2.7 to 9.0</b>
<b>Developing countries</b>	<b>-3.3 to -7.2</b>
<b>Southeast Asia</b>	<b>-2.5 to -7.8</b>
<b>South Asia</b>	<b>-18.2 to -22.1</b>
<b>Sub-Saharan Africa</b>	<b>-3.9 to -7.5</b>
<b>Latin America</b>	<b>5.2 to 12.5</b>

**SOURCE:** Adapted from Tubiello and Fischer 2007.

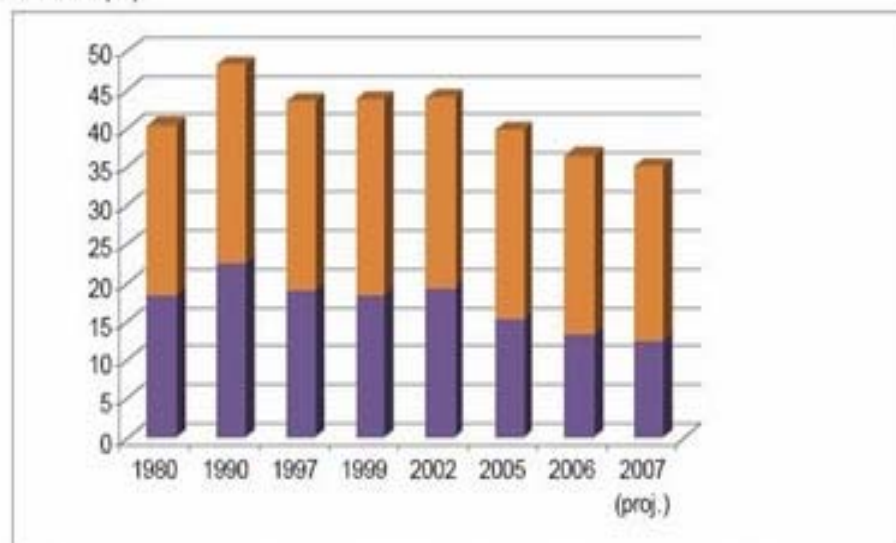
# América Latina - Base da Pirâmide como fonte de crescimento

Graph 1 – Number of People under Poverty and Indigence in Latin America (Millions)



Note: Green columns represent the share of indigents in total (blue) poor millions.  
Source: ECLAC ([Social Panorama of Latin America, 2007](#))

Graph 2 – Percentages of Population under Poverty and Indigence Conditions in Latin America (%)



Note: Blue columns represent the share of indigents in total (yellow) percentages of poor people.  
Source: ECLAC ([Social Panorama of Latin America, 2007](#))

# América Latina - Integração Física e Crescimento

## IIRSA - AGENDA DE IMPLEMENTACION CONSENSUADA 2005-2010

