

São Paulo, 28 de março de 2019.

## Belarus – Acesso à OMC e cotas para carne de aves

### Panorama geral do mercado:

Belarus produziu cerca de 525 mil toneladas de carne de frango em 2018, um incremento de 7,4% em relação ao ano de 2017. Para o ano de 2019, os dados do USDA projetam crescimento de 1,9%.

Analisando a evolução desde 2010, a produção de carne de frango em Belarus cresceu a uma taxa média de 8,2% ao ano.

Assim como a produção, as exportações cresceram em um ritmo acelerado, de 18,5% ao ano, chegando a 175 mil toneladas em 2018. As estimativas para 2019 indicam que o crescimento atingiria 5,7%.

O consumo interno, que cresceu a uma taxa média de 5% ao ano, teve redução em 2018 (-0,8%), sem perspectiva de expansão em 2019.

Já as importações, tiveram queda de volume no histórico dos últimos 9 anos, taxa de 5,1% ao ano. Em 2018 e 2019, as projeções indicam importação de 5 mil toneladas apenas, quase um quarto das importações de 2017.

Balanço de oferta e demanda de carne de frango em Belarus										
Volume (mil toneladas)										
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019*
<b>Produção</b>	<b>259</b>	<b>297</b>	<b>351</b>	<b>383</b>	<b>422</b>	<b>453</b>	<b>463</b>	<b>489</b>	<b>525</b>	<b>535</b>
<i>Variação</i>		14,7%	18,2%	9,1%	10,2%	7,3%	2,2%	5,6%	7,4%	1,9%
<b>Importação</b>	<b>8</b>	<b>12</b>	<b>18</b>	<b>13</b>	<b>30</b>	<b>18</b>	<b>19</b>	<b>19</b>	<b>5</b>	<b>5</b>
<i>Variação</i>		50%	50%	-28%	131%	-40%	6%	0%	-74%	0%
<b>Exportação</b>	<b>38</b>	<b>74</b>	<b>105</b>	<b>105</b>	<b>113</b>	<b>135</b>	<b>145</b>	<b>150</b>	<b>175</b>	<b>185</b>
<i>Variação</i>		94,7%	41,9%	0,0%	7,6%	19,5%	7,4%	3,4%	16,7%	5,7%
<b>Consumo</b>	<b>229</b>	<b>235</b>	<b>264</b>	<b>291</b>	<b>339</b>	<b>336</b>	<b>337</b>	<b>358</b>	<b>355</b>	<b>355</b>
<i>Variação</i>		2,6%	12,3%	10,2%	16,5%	-0,9%	0,3%	6,2%	-0,8%	0,0%

Fonte: USDA.

Os principais produtos importados de carne de aves in natura são carne de frango, carne de peru e carne de ganso. A tabela abaixo ilustra as informações de importação de 2010 a 2013.

O principal produto importado é o corte sem osso de carne de frango, seguido do corte sem osso de carne de peru e frango inteiro.

Importações de Belarus					
Volume (tons)					
Código	Descrição	2010	2011	2012	2013
<b>0207141009</b>	Frozen cuts and edible offal of fowls of the species Gallus domesticus: cuts: boneless: other	3.869	6.160	6.111	6.749
<b>0207141001</b>	Frozen cuts and edible offal of fowls of the species Gallus domesticus: cuts: boneless: within volume and in	2.641	4.043	8.842	3.388

	procedure indicated in Additional note 4 of the Russian Federation to Chapter 02				
<b>0207271009</b>	Frozen cuts and edible offal of turkeys of the species domesticus: cuts: boneless: other	3.091	2.230	3.378	1.715
<b>0207129009</b>	Frozen fowls of the species Gallus domesticus, not cut in pieces: plucked and drawn, without heads and feet and without necks, hearts, livers, and gizzards, known as "65% chickens" or otherwise presented: other	19	478	1.211	634
<b>0207271001</b>	Frozen cuts and edible offal of turkeys of the species domesticus: cuts: boneless: within volume and in procedure indicated in Additional note 4 of the Russian Federation to Chapter 02	534	829	1.934	376
<b>0207146009</b>	Frozen cuts and edible offal of fowls of the species Gallus domesticus: cuts: with bone in: legs and cuts thereof: other		43	201	341
<b>0207149909</b>	Frozen cuts and edible offal of fowls of the species Gallus domesticus: offal: other: other	66	189	443	321
<b>0207119009</b>	Fresh or chilled fowls of the species Gallus domesticus, not cut in pieces: plucked and drawn, without heads and feet and without necks, hearts, livers, and gizzards, known as "65% chickens", or otherwise presented: other		261	37	144
<b>0207142009</b>	Frozen cuts and edible offal of fowls of the species Gallus domesticus: cuts: with bone in: other	58	61	71	74
<b>0207143009</b>	Frozen cuts and edible offal of fowls of the species Gallus domesticus: cuts: with bone in: whole wings, with or without tips: other	20		7	50
<b>0207142001</b>	Meat and edible offal. of the poultry of heading 0105. fresh. chilled or frozen: fowls of the . . .			21	46
<b>0207423009</b>	Frozen domestic ducks. not cut in pieces : no description available at 10-digit level			2	42
<b>0207121009</b>	Frozen fowls of the species Gallus domesticus, not cut in pieces: plucked and drawn, without heads and feet but with necks, hearts, livers, and gizzards, known as "70% chickens": other		7		40
<b>0207279909</b>	Frozen cuts and edible offal of turkeys of the species domesticus: offal: other: other	4		27	19
<b>0207149109</b>	Frozen cuts and edible offal of fowls of the species Gallus domesticus: offal: livers: other			2	16
<b>0207279109</b>	Frozen cuts and edible offal of turkeys of the species domesticus: offal: livers: other	5		8	12
<b>0207135009</b>	Fresh or chilled cuts and edible offal of fowls of the species Gallus domesticus: cuts: with bone in: breasts and cuts thereof: other				10

<b>0207275009</b>	Frozen cuts and edible offal of turkeys of the species domesticus: cuts: with bone in: breasts and cuts thereof: other				10
<b>0207521009</b>	Frozen domestic geese. not cut in pieces : no description available at 10-digit level				6
<b>0207274009</b>	Frozen cuts and edible offal of turkeys of the species domesticus: cuts: with bone in: backs, necks, backs with necks attached, rumps and wing tips: other			2	5
<b>0207428009</b>	Frozen domestic ducks. not cut in pieces : no description available at 10-digit level			7	5
<b>0207418009</b>	Fresh or chilled domestic ducks. not cut in pieces : no description available at 10-digit level			3	5
<b>0207276009</b>	Frozen cuts and edible offal of turkeys of the species domesticus: cuts: with bone in: legs and cuts thereof: drumsticks and cuts thereof: other				4
<b>0207446109</b>	Fresh or chilled cuts and edible offal of domestic ducks (excl. fatty livers) : no description . . .			1	4
<b>0207273009</b>	Frozen cuts and edible offal of turkeys of the species domesticus: cuts: with bone in: whole wings, with or without tips: other				3
<b>0207556109</b>	Frozen cuts and edible offal of domestic geese : no description available at 10-digit level			1	2
<b>0207136009</b>	Fresh or chilled cuts and edible offal of fowls of the species Gallus domesticus: cuts: with bone in: legs and cuts thereof: other		0		2
<b>0207445109</b>	Fresh or chilled cuts and edible offal of domestic ducks (excl. fatty livers) : no description . . .			1	2
<b>0207251009</b>	Frozen turkeys of the species domesticus. not cut into pieces: plucked and drawn without heads . . .			2	2
<b>0207559509</b>	Frozen cuts and edible offal of domestic geese : no description available at 10-digit level				2
<b>0207412009</b>	Fresh or chilled domestic ducks. not cut in pieces : no description available at 10-digit level			0	2
<b>0207145009</b>	Frozen cuts and edible offal of fowls of the species Gallus domesticus: cuts: with bone in: . . .		14		1
<b>0207555109</b>	Frozen cuts and edible offal of domestic geese : no description available at 10-digit level			1	1
<b>0207559309</b>	Frozen cuts and edible offal of domestic geese : no description available at 10-digit level			1	1
<b>0207277009</b>	Frozen cuts and edible offal of turkeys of the species domesticus: cuts: with bone in: legs and cuts thereof: other: other				1
<b>0207269109</b>	Fresh or chilled cuts and edible offal of turkeys of the species domesticus : offal: livers: no description available at 10-digit level			2	1

<b>0207413001</b>	Fresh or chilled domestic ducks. not cut in pieces : no description available at 10-digit level				1
<b>0207259009</b>	Frozen turkeys of the species domesticus, not cut into pieces: plucked and drawn, without heads and feet and without necks, hearts, livers, and gizzards, known as "73% turkeys" or otherwise presented: other			0	1
<b>0207529009</b>	Frozen domestic geese. not cut in pieces : no description available at 10-digit level				1
<b>0207456109</b>	Frozen cuts and edible offal of domestic ducks : no description available at 10-digit level				1
<b>0207459309</b>	Frozen cuts and edible offal of domestic ducks : no description available at 10-digit level			0	1
<b>0207451009</b>	Frozen cuts and edible offal of domestic ducks : no description available at 10-digit level			1	0
<b>0207111009</b>	Fresh or chilled fowls of the species Gallus domesticus, not cut in pieces: plucked and gutted, with heads and feet, known as "83% chickens": other		60		
<b>0207129000</b>	- - - Plucked and drawn, without heads and feet but with necks, hearts, livers and gizzards, known as "65% chickens," or otherwise presented	38			
<b>0207131000</b>	- - - - Boneless				
<b>0207144009</b>	Frozen cuts and edible offal of fowls of the species Gallus domesticus: cuts: with bone in: backs, necks, backs with necks attached, rumps and wing tips: other		10		
<b>0207147009</b>	Frozen cuts and edible offal of fowls of the species Gallus domesticus: cuts: with bone in: other: other		30		
<b>0207261000</b>	Fresh or chilled cuts and edible offal of turkeys of the species domesticus + detailed label not available +				
<b>0207272009</b>	Frozen cuts and edible offal of turkeys of the species domesticus: cuts: with bone in: halves and quarters: other		3		

Em 2018, os principais fornecedores de carne de aves in natura para Belarus são Lituânia, Rússia, Polônia, Letônia e Finlândia. Os cinco principais exportadores foram responsáveis por 84,5% dos embarques em 2018.

Segundo dados do Trademap, a última exportação brasileira, de 54 toneladas, ocorreu em 2015 e classificou o Brasil como o 12º no ranking de fornecedores.

<b>Importações de Belarus por país de origem</b>						
<b>Volume (TONS)</b>						
<i>Código HS: 0207 - Meat and edible offal of fowls of the species Gallus domesticus. ducks. geese. turkeys and guinea fowls. fresh. chilled or frozen</i>						
<b>Exportadores</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>Share em 2018</b>
<b>Mundo</b>	<b>31.667</b>	<b>19.192</b>	<b>22.814</b>	<b>19.356</b>	<b>8.785</b>	<b>100%</b>
<i>Lituânia</i>	1.543	1.101	1.891	4.599	1.866	21,2%
<i>Rússia</i>	3.326	1.884	1.481	3.374	1.861	21,2%

<i>Polônia</i>	5.503	5.906	7.221	880	1.779	20,3%
<i>Letônia</i>	1.499	1.829	1.552	1.936	1.090	12,4%
<i>Finlândia</i>	888	2.435	2.531	2.036	830	9,4%
<i>Reino Unido</i>	537		21	1.095	453	5,2%
<i>Hungria</i>	2.377	1.182	1.526	2.367	400	4,6%
<i>França</i>	3.024	1.439	2.376	1.343	319	3,6%
<i>Eslováquia</i>	580	421	745	640	100	1,1%
<i>Dinamarca</i>	54				84	1,0%
<i>Ucrânia</i>	8.291	4	3	2	2	0,02%
<i>Argentina</i>	25					0%
<i>Bélgica</i>	3.464	2.605	2.947	421		0%
<i>Brasil</i>	176	54				0%
<i>Alemanha</i>						0%
<i>Holanda</i>		63	521	661		0%
<i>Eslovênia</i>						0%
<i>Turquia</i>	20					0%
<i>EUA</i>	359	270				0%

Fonte: TRADEMAP

É importante ressaltar que o Brasil não exportou para Belarus os produtos categorizados nos HS 0207131001, 0207141001, 0207261001 e 0207271001.

Segundo dados do Trademap, não há registros de importação de cortes de frango in natura desossados e refrigerados no código 0207131001, nem de cortes de peru in natura refrigerados no código 0207261001.

Dados de 2013 mostram que os principais fornecedores de cortes de frango in natura desossados e congelados, categorizados no código 0207141001, foram Polônia, Hungria, Lituânia e Eslováquia.

<b>Importações de Belarus por país de origem</b>				
<b>Volume (TONS)</b>				
<i>Código HS: 0207141001 – cortes de frango in natura congelados</i>				
<b>Exportadores</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
<b>Mundo</b>	<b>2.641</b>	<b>4.043</b>	<b>8.842</b>	<b>3.388</b>
<i>Polônia</i>	1.681	1.900	2.916	1.003
<i>Hungria</i>	440	679	1.440	640
<i>Lituânia</i>		380	1.539	540
<i>Eslováquia</i>		20	260	520
<i>França</i>		201	503	425
<i>Bélgica</i>	480	80	1.962	220
<i>Letônia</i>	20	160	180	20
<i>Eslovênia</i>				20
<i>Rússia</i>	20			
<i>Holanda</i>			42	
<i>Alemanha</i>		623		

Fonte: Trademap

Os principais fornecedores de cortes de peru in natura congelados, categorizados no HS 0207271001, foram França e Rússia.

<i>Importações de Belarus por país de origem</i>				
<i>Volume (TONS)</i>				
<i>HS code: 0207.27.1001 – cortes de peru in natura congelados</i>				
<i>Exportadores</i>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
<b>Mundo</b>	<b>534</b>	<b>829</b>	<b>1.934</b>	<b>376</b>
<i>França</i>	378	764	1.736	321
<i>Rússia</i>				52
<i>Polônia</i>	95	5	198	3
<i>Alemanha</i>	61	60		

Fonte: Trademap

### Posicionamento setorial:

O setor avícola brasileiro tem expectativa de exportar carne de frango para Belarus, porém, envolvendo todos os cortes de frango e de peru congelados. Neste sentido, a ABPA se posiciona a favor a inclusão de todos os códigos tarifários do HS6 0207.12, 0207.14, 0207.25 e 0207.27:

<b>Código</b>	<b>Descrição</b>
0207 12	-- not divided, frozen:
0207 12 100	--- Plucked and gutted, without a head and plus legs, but with a neck, heart, liver and muscular stomach, presented as "70% chickens":
0207 12 100 1	---- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 12 100 9	---- other
0207 12 900	--- Plucked and gutted, without head and plus of legs and without neck, heart, liver and muscular stomach, presented as "65% chickens", or presented in any other dressing:
0207 12 900 1	---- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 12 900 9	---- other
0207 14	-- parts of carcasses and offal, frozen:
	--- parts of carcasses:
0207 14 100	---- boneless meat:
0207 14 100 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 14 100 9	----- other
	---- bone in:
0207 14 200	----- half or quarter:
0207 14 200 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 14 200 9	----- other

0207 14 300	----- wings are whole, with a thin end or without it:
0207 14 300 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 14 300 9	----- other
0207 14 400	----- backs, necks, backs together with a neck, tails and the thin ends of wings:
0207 14 400 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 14 400 9	----- other
0207 14 500	----- breasts and pieces of them:
0207 14 500 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 14 500 9	----- other
0207 14 600	----- legs and pieces of them:
0207 14 600 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 14 600 9	----- other
0207 14 700	----- other:
0207 14 700 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 14 700 9	----- other
	--- offal:
0207 14 910	---- liver:
0207 14 910 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 14 910 9	----- other
0207 14 990	---- other:
0207 14 990 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 14 990 9	----- other
0207 2	- turkeys:
0207 25	-- not divided, frozen:
0207 25 100	--- Plucked and gutted, without a head and plus legs, but with a neck, heart, liver and muscular stomach, presented as "80% turkey":
0207 25 100 1	---- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 25 100 9	---- other
0207 25 900	--- Plucked and gutted, without head and plus of legs, without neck, heart, liver and muscular stomach, presented as "73% turkeys", or presented in any other dressing:
0207 25 900 1	---- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 25 900 9	---- other
0207 27	-- parts of carcasses and offal, frozen:

	--- parts of carcasses:
0207 27 100	---- boneless meat:
0207 27 100 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 27 100 9	----- other
	---- bone in:
0207 27 200	----- half or quarter:
0207 27 200 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 27 200 9	----- other
0207 27 300	----- wings are whole, with a thin end or without it:
0207 27 300 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 27 300 9	----- other
0207 27 400	----- backs, necks, backs together with a neck, tails and the thin ends of wings:
0207 27 400 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 27 400 9	----- other
0207 27 500	----- breasts and pieces of them:
0207 27 500 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 27 500 9	----- other
	----- legs and pieces of them:
0207 27 600	----- shins and pieces of them:
0207 27 600 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 27 600 9	----- other
0207 27 700	----- other:
0207 27 700 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 27 700 9	----- other
0207 27 800	----- other:
0207 27 800 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 27 800 9	----- other
	--- offal:
0207 27 910	---- liver:
0207 27 910 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 27 910 9	----- other
0207 27 990	---- other:



0207 27 990 1	----- in the order specified in the supplementary note of the Eurasian Economic Union 4 to group 02
0207 27 990 9	----- other

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