Chapter 11

Analysis of the export market of the municipality of Altamira in the period of 2017-2018

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ABSTRACT
This article discusses the relevant theoretical perspectives about the city of Altamira-PA regarding its development and also will present an analysis of its insertion in foreign trade in the period from 2017 to 2018. For this, the competitiveness matrix methodology will be adopted as an analytical tool for describing the main historical and economic characteristics of Altamira, as well as identifying its most important products and which factors have the greatest influence on its composition, with collected data from foreign trade sources such as the Ministry Industry, Foreign Trade and Services (MDIC) and COMEX STAT, have resulted in aggregate data expressing the reality of the export sector of Altamira County. All this can help in the elaboration of measures that would be better adapted for the economic development of Altamira.

Keywords: Matrix of Competitiveness, Export, Altamira, Pará, Foreign Trade.

1 INTRODUCTION

The market is in constant dynamism and is moved by the supply and demand of products between cities and countries, together with its export structure and international export structure. For PENA (2004), international trade has revealed in recent years the trajectory in search of free negotiation has not been

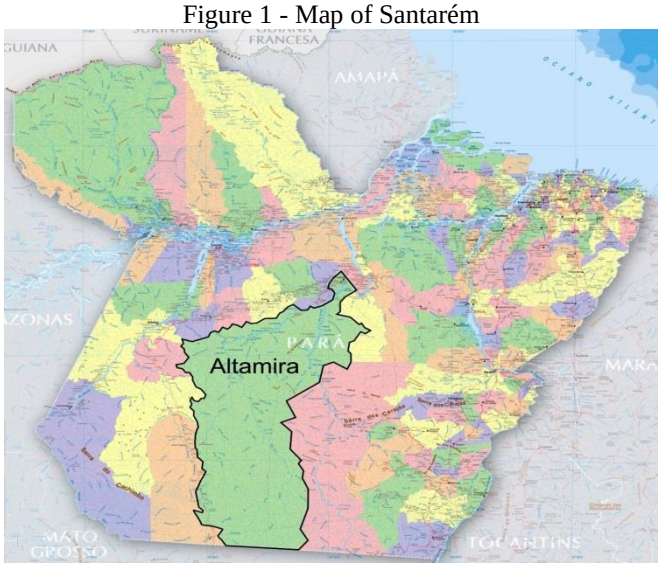
expressed in a significant improvement in the social indicators of the least developed countries, despite the exponential growth of world exports.

Having a reference still PENA (2004), it highlights the destination of this work when it says:

And this work is primarily focused on the analysis of foreign trade in the State of Pará, which presents great growth potential, and is an important topic to be discussed, intending to promote the economic development of the State not only in the sense of the structural characteristics of the economy but mainly, aimed at qualifying the living conditions of the population.

In this context, the work will consist of the analysis of the municipality of Altamira, which is located in the state of Pará. In the micro-region is the most populous municipality and the 12th in the entire state, with an estimated population, according to IBGE data of 2021, of 117,320 inhabitants, Altamira has an area of 159,533,306 km², according to the Brazilian Institute of Geography and Statistics 2021, this makes it the largest municipality in Brazil and the third largest in the world in territorial extension. It obtains a GDP per capita of 24,250.13, occupying the 18th position throughout the state of Pará (IBGE, 2019).

Figure 1 - Map of Santarém



Fonte: Google Maps, 2022.

Altamira originated in the Jesuit missions in the first half of the 19th century. 18th century, when it was still part of the gigantic municipality of Souzel. The tour of the Jesuit Roque de Hunderfund was the first historical record of colonization practiced in this territory, where it was founded on the banks of the River Pots, a catchetetic mission aimed at the Indians who inhabited the entire region.

With the help of the indigenous workforce, the Italian Capuchin friars were able to open a short shortcut to the lower to the middle Xingu. In 1880, when there was immigration from various parts of the world, began the settlement of the region between the Ambé and Panelas igarapés, which would later promote the creation of the Municipality of Altamira, on November 6, 1911, already by State Law No. 1,234.

2 THEORETICAL REFERENCE

2.1 INTERNATIONAL MARKET IN LOCAL INFLUENCE

The search for the foreign market cannot be done in a disorganized manner, at the risk of wasting scarce resources, the State as a whole, or companies. Before defining a policy to promote exports, those responsible for its conduct need to know the foreign market, the sources of competitiveness, and the capacity to expand the country's production. That is, it is necessary to know the behavior of global demand, and the comparative advantages of the State and its main competitors before defining which productive sectors should be stimulated. Likewise, a company, before venturing into a foreign market, needs to analyze which market presents the best conditions for the placement of its product. PENA (2004).

Also for PENA (2004), the choice of target sectors should be based on the competitiveness of the products of the Pará Export Tariff (supply conditions) on the performance and size of external demand for the product (demand conditions) and should prioritize the products with the highest probabilities of success.

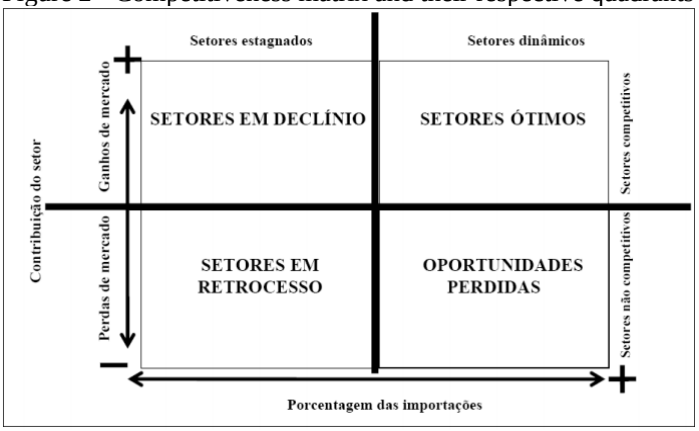
About the product market, the presence of dynamic (learning and product differentiation) and static (economies of scale, scope, and internationalization) factors, together with externalities, compromises the activities of companies. Companies in a lagging industry need to quickly acquire technological capacity, which requires investments in technological development, which are, by nature, risky and expensive. In addition, these companies find a market dominated by larger ones, with a high degree of productive diversification, and have been installed for some time.

All this leads to the prospect of long difficulties and losses, which contributes to making their entry into the market more arduous, thus weakening the private interest (WADE, 1990).

2.2 COMPETITIVENESS MATRIX

The competitiveness matrix methodology, created by the Economic Commission for Latin America (ECLAC), in 2002, represents the situation of the dynamism of a country's international market at a given time, coming from the relationship between its structure and international trade, where the results are expressed through four sectors (Optimal Sectors, Lost Opportunities, Sectors in Decline and Decline), one in each quadrant, according to supply and demand.

Figure 2 - Competitiveness matrix and their respective quadrants



Source: PENA, 2015.

In this case, the matrix will meet the import table according to the sectors mentioned above in which:

1. **Great sectors**: when a locality is gaining market share of a product where demand is increasing.
2. **Missed opportunities**: represents the decrease in product participation in the market with increasing international demand.
3. **Declining sectors**: show market gain over products with declining demand.
4. **Sectors in decline**: they are the least desirable, and occur when the share of the product reduces in the market whose international demand is decreasing.

The horizontal axis of the matrix represents the evolution of participation in import by group:

a) Stagnant: the importance decreases in total market imports;
b) **Dynamic**: high importance in total imported by the market in the international market

while the vertical axis is related to the competitive dynamism of the country:

c) **Competitive**: sectors in which the country gains market share, i.e., has market gain (participation);
d) Non-competitive: sectors, where the country loses market share, which means it has a market loss. (PEN, 2005)

3 METHODOLOGY

3.1 STUDY AREA

The place of study will be the export agenda of the municipality of Altamira in Pará estimated to have a GDP of 2,472,772.87 (IBGE, 2016), and in 2017, the average monthly salary was 2.5 minimum wages. The proportion of people employed in the total population was 17.1%. In comparison with the other municipalities in the state, it occupied positions 13 out of 144, respectively. In comparison with cities throughout the country, it was at position 1763 of 5570, respectively. Considering households with monthly incomes of up to half a minimum wage per person, had 41.5% of the population under these conditions, which placed it in position 131 out of 144 among the cities of the state and in position 2547 out of 5570 among cities of Brazil.

3.2 COMMODITY TAX CLASSIFICATION: COMMODITY STANDARDIZATION SYSTEMS

According to the Ministry of Development, Industry and Foreign Trade, the Harmonized System of Designation and Codification of Goods, or simply Harmonized System (HS), is an international method of classification of goods, based on a structure of different codes for each commodity to identify its aspects: tributaries, administrative and statistical. This process covers the following areas: import, export, and domestic market. The main objective of the creation of the Harmonized System was to promote the development of international trade, as well as to improve the collection, comparison, and analysis of foreign trade statistics. As a consequence, the HS through the data generated facilitates international trade negotiations, and the preparation of freight tariffs provides statistical data on the different means of transport of goods and other information used by the various actors in international trade.

The SH codes can be composed of two digits (SH2), four digits (SH4) up to six digits (SH6), thus allowing the specificities of the products, such as origin, constituent matter, and application, to be understood in a logical numerical ordering, increasing and according to the level of sophistication of the goods. Brazil, Argentina, Paraguay, and Uruguay use the Harmonized System as the basis for the classification of goods in the Mercosur Common Nomenclature (NCM), a form of internal standardization plus two digits to its base, totaling eight, which allows classifying its goods to an even more detailed level of sophistication.

3.3 DATA SOURCE

To analyze the dynamics of the production structure of the municipality of Altamira in the State of Pará, this study will be based on the statistics provided by Comex Stat, provided by the Ministry of Industry, Foreign Trade, and Services is an important environment for consultations and data extraction from Brazilian foreign trade. The statistics are released by Radar Siscomex monthly with detailed data on Brazilian exports and imports, extracted from SISCOMEX and based on the declaration of exporters and importers. Using the statistical data search method, Comex Stat allows detailed identification of goods based on NCM code.

The Commercial Radar System allows access to data and analyses that facilitate the selection of markets and products for insertion in the international market. The data and analyses available in the System are reported for three years to demonstrate market trends and avoid seasonality (MDIC, 2007). This research will use the data of the main products exported from Altamira provided from the Comex Stat export modality portal as secondary sources so that they can generate quantitative results through the formulas arranged in the competitiveness matrix.

The coding of the Four Digit Harmonized System (SH4) is the standard level of sophistication of Comex Stat data by the municipality, this level allows the statistics generated to cover information not only of the product researched but also of those that have the highest level of sophistication, that is, its derivatives. Along with this, the products selected for analysis will be only those that contain fob export values of 2017 and 2018 above U$0.00 declared in the portal, so it will be possible to provide a significant amount of values for comparison. Therefore, it is considered that the official reports provided by the Federal Government are accurate about the export dynamics of Altamira, given the degree of importance of the data as well as the characteristic of annual periodicity of the collection of information.

3.4 STATISTICAL INDICATORS

The methodology consisted of an adaptation of the model of the competitiveness matrix developed by ECLAC, in principle, the identification of the export dynamism of the municipality of Altamira, with regional demand, and from the latter relates the state's export tariff with the national export standards.

For the framing of the main products exported from Altamira in the competitiveness matrix, we first sought to identify the dynamism of each product (X) in the national export tariff, which in the matrix presented corresponds to the horizontal axis. For this, the following formula was used.

$$Dinamismo\ nacional\ do\ produto\ (X) = \left[\left(\frac{VEBX\ (t)}{VEBX\ (t-1)}\right) - 1\right] \times 100$$

where,
VEBX (t) = Exported value (US$ FOB) of the product (*X*) in the Brazilian tariff in the current year;
VEBX (t-1) = Exported value (US$ FOB) of the product (*X*) in the Brazilian tariff in the previous year.

If the coefficient of this expression will be greater than zero, then in the national dynamics in the current year, this product fits into the positive quadrant of the horizontal axis in the competitiveness matrix, representing dynamism. If the coefficient is negative, the product falls into the negative quadrant of the horizontal axis, representing stagnation.

After defining the horizontal quadrant of the matrix, it is necessary to define the vertical axis of the frame in which sector the analyzed product fits. For this, the market gains of the product (X) will be addressed, which relates the value exported by the municipality and the value exported by the State in the most recent years from the following formula:

$$Ganhos\ de\ mercado\ do\ produto\ (X)\ no\ ano\ (t) = \left(\frac{VESX\ (t)}{VEPX\ (t)}\right) \times 100$$

where
VESX (t) = Exported value (US$ FOB) of the product (*X*) on the Altamira agenda in the current year;
VEPX (t) = Exported value (US$ FOB) of the product (*X*) on the agenda of the State of Pará in the current year;

And then, the analysis of the gains of the current years compared to previous years:

$$Ganhos\ de\ mercado\ do\ produto\ (X)\ no\ ano\ (t-1) = \left(\frac{VESX\ (t-1)}{VEPX\ (t-1)}\right) \times 100$$

Where
VESX (t–1) = Exported value (US$ FOB) of the product (*X*) on the Altamira agenda in the previous year;
VEPX (t–1) = Exported value (US$ FOB) of the product (X) on the agenda of the State of Pará in the previous year.

If the formula coefficient for market gains in the year (*t*), the current year, is higher than the coefficient in the year (*t-1*), the previous year, then the product (*X*) falls into the positive quadrant of the vertical axis representing market gains. Otherwise, if the formula coefficient for market gains in the year (*t-1*) is higher than the coefficient of the year (*t*), then the product (*X*) falls into the negative quadrant of the vertical axis demonstrating market loss.

4 FINDINGS

4.1 EXPRESSIVENESS OF EXPORTED PRODUCTS

After the crossing of data acquired from Comex Vis (IBGE) and Comex Stat, the results obtained demonstrated the relevance of the percentage participation of each activity analyzed for matrix classification. It is through these data that it is possible to understand the export dynamism experienced by the municipality of Altamira, considering its capacity for regional articulation because it covers a large part of the territory, and also has abundant water and energy resources, capacity in the rural sector, where its economy is strongly based on the primary sector, and because it is a power in the agro-industrial sector, there is a high demand for occupation of your area in the demand for labor.

The process of generating these results sought to describe the most likely economic scenario of the reality of the region. With the observation of the matrix one can emphasize the various factors that positively and negatively imply Altamira and its relationship with international trade, and logically can judge the effectiveness of the export sectors, the objective of this is to counter the current situation with a desirable situation.

The coefficients generated from the dynamism formulas guarantee accurate results for each product according to its Harmonic System (SH4) code. The first tables present the main activities of the export agenda of the municipality and its local, state, and national economy, then comparations of statistical results of 2017 and 2018 about their respective previous years, as well as their variations in results, and finally, the competitiveness matrix with the data of each product that contributed to the matrix result.

Table 1 - Main products of the Altamira export agenda *(SH4/%)*

	Main exported products: Altamira-PA					
	2017			2018		
Code (SH4)	**Item**	**Value US$ (FOB)**	**Participation (%) in the municipal agenda**	**Item**	**Value US$ (FOB)**	**Participation (%) in the municipal agenda**
8704	Motor vehicles for the transport of goods	18.356.661	67,8 %	Motor vehicles for the transport of goods	5.292.000	45,5 %
8429	Bulldozers, angledozers, levelers, scrapers, mechanical shovels, excavators, loaders and loaders, compactors and compressor rollers or cylinders, self-propelled	4.307.123	15,9 %	Bulldozers, angledozers, levelers, scrapers, mechanical shovels, excavators, loaders and loaders, compactors and compressor rollers or cylinders, self-propelled	3.490.050	30 %
8426	Khabres; cranes, including cable cranes; cranes, unloading and moving gantries, crane bridges, gantries, crane cars	1.008.302	3,72 %	Khabres; cranes, including cable cranes; cranes, unloading and moving gantries, crane bridges, gantries, crane cars	890.222	7,65 %
4409	Wood (including clubs and beadings for floors, not assembled) profiled (with spikes, grooves, fillets, notches, chamfered, with V-joints, beaded, beaded or the like) along one or more edges, faces or ends, even flattened	677.709	2,50 %	Wood (including clubs and beadings for floors, not assembled) profiled (with spikes, grooves, fillets, notches, chamfered, with V-joints, beaded, beaded or the like) along one or more edges, faces or ends, even flattened	644.780	5,54 %
4407	Wood sawn or straightened lengthwise, cut or unrolled, even flattened, polished or joined by the ends, of a thickness greater than 6 mm	373.041	1,38 %	Wood sawn or straightened lengthwise, cut or unrolled, even flattened, polished or joined by the ends, of a thickness greater than 6 mm	399.287	3,43 %

Source: Adapted from the data provided by COMEX STAT

Table 2 - Altamira's participation in the export agenda of Pará in the items *(SH4/%)*

	Altamira's participation in the export agenda of Pará					
	2017			2018		
Code (SH4)	**Item**	**Value US$ (FOB) Pará**	**Altamira's share (%)**	**Item**	**Value US$ (FOB) Pará**	**Altamira's share (%)**
8704	Motor vehicles for the transport of goods	18.356.661	100 %	Motor vehicles for the transport of goods	5.292.000	100 %
8429	Bulldozers, angledozers, levelers, scrapers, mechanical shovels, excavators, loaders and loaders, compactors and compressor rollers or cylinders, self-propelled	5.777.868	74,5 %	Bulldozers, angledozers, levelers, scrapers, mechanical shovels, excavators, loaders and loaders, compactors and compressor rollers or cylinders, self-propelled	3.626.538	96,24 %
8426	Khabres; cranes, including cable cranes; cranes, unloading and moving gantries, crane bridges, gantries, crane cars	1.008.302	100 %	Khabres; cranes, including cable cranes; cranes, unloading and moving gantries, crane bridges, gantries, crane cars	890.222	100 %
4409	Wood (including clubs and beadings for floors, not assembled) profiled (with spikes, grooves, fillets, notches, chamfered, with V-joints, beaded, beaded or the like) along one or more edges, faces or ends, even flattened	118.586.419	0,6 %	Wood (including clubs and beadings for floors, not assembled) profiled (with spikes, grooves, fillets, notches, chamfered, with V-joints, beaded, beaded or the like) along one or more edges, faces or ends, even flattened	137.863.333	0,47 %
4407	Wood sawn or straightened lengthwise, cut or unrolled, even flattened, polished or joined by the ends, of a thickness greater than 6 mm	40.082.256	0,93 %	Wood sawn or straightened lengthwise, cut or unrolled, even flattened, polished or joined by the ends, of a thickness greater than 6 mm	54.125.807	0,74 %

Source: Adapted from the data provided by COMEX STAT

Table 3 - Participation of Pará in the export agenda of Brazil in items *(SH4/%)*

	Participation of Pará in brazil's export agenda					
	2017			2018		
Code (SH4)	**Item**	**Value US$ (FOB) Brazil**	**Participation (%) of Pará**	**Item**	**Value US$ (FOB) Brazil**	**Participation (%) of Pará**
8704	Motor vehicles for the transport of goods	2.825.639.503	0,65 %	Motor vehicles for the transport of goods	2.271.214.797	0,23 %
8429	Bulldozers, angledozers, levelers, scrapers, mechanical shovels, excavators, loaders and loaders, compactors and compressor rollers or cylinders, self-propelled	2.239.622.984	0,26 %	Bulldozers, angledozers, levelers, scrapers, mechanical shovels, excavators, loaders and loaders, compactors and compressor rollers or cylinders, self-propelled	2.578.870.931	0,14 %
8426	Khabres; cranes, including cable cranes; cranes, unloading and moving gantries, crane bridges, gantries, crane cars	56.182.080	1,8 %	Khabres; cranes, including cable cranes; cranes, unloading and moving gantries, crane bridges, gantries, crane cars	48.927.671	1,82 %
4409	Wood (including clubs and beadings for floors, not assembled) profiled (with spikes, grooves, fillets, notches, chamfered, with V-joints, beaded, beaded or the like) along one or more edges, faces or ends, even flattened	482.137.988	24,6 %	Wood (including clubs and beadings for floors, not assembled) profiled (with spikes, grooves, fillets, notches, chamfered, with V-joints, beaded, beaded or the like) along one or more edges, faces or ends, even flattened	495.338.005	27,83 %
4407	Wood sawn or straightened lengthwise, cut or unrolled, even flattened, polished or joined by the ends, of a thickness greater than 6 mm	665.281.279	6 %	Wood sawn or straightened lengthwise, cut or unrolled, even flattened, polished or joined by the ends, of a thickness greater than 6 mm	771.260.474	7 %

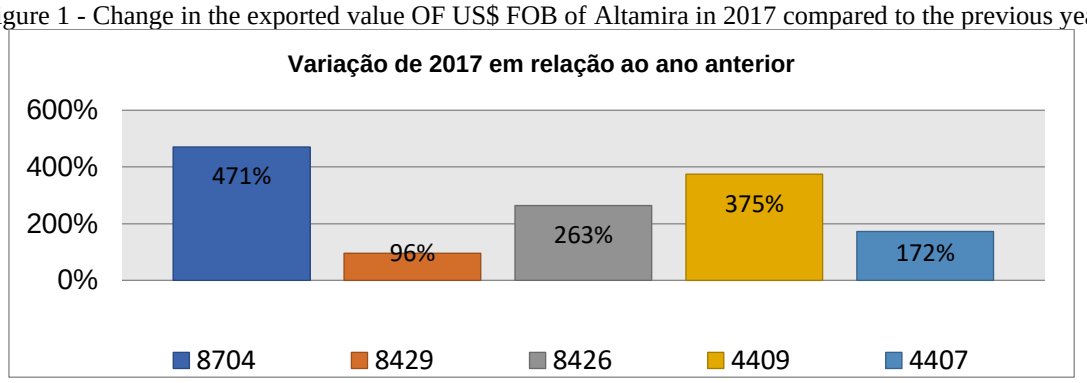
Source: Adapted from the data provided by COMEX STAT

The analysis of export values in the municipality of Altamira reveals that the total FOB export value in the period from January to December 2017 reached the mark of US$27,079,341 million, equivalent to 0.19% of the entire export tariff of the state of Pará, and expressed a growth of 255.7% compared to the same period in 2016, totaled US$ 7,613,025 million. In 2018, the municipality generated no less than US$11,633,252 million, corresponding to 0.07% of the total export agenda of Pará, this expressed a drop in revenue of approximately -57% compared to 2017, which in value represents a deficit of US$ 15,446.09 million (Comex Stat, MDIC. 2022).

This list of values is, therefore, a considerable drop that may be a reflection of the internal difficulties that limit the diversification of the products of the export tariff and the specialization of the internal market, as a consequence, the prospection of new markets and international agreements with a large quota of customers is impaired, and the great effort in the face of this scenario will be to maintain the buying and selling relations already acquired.

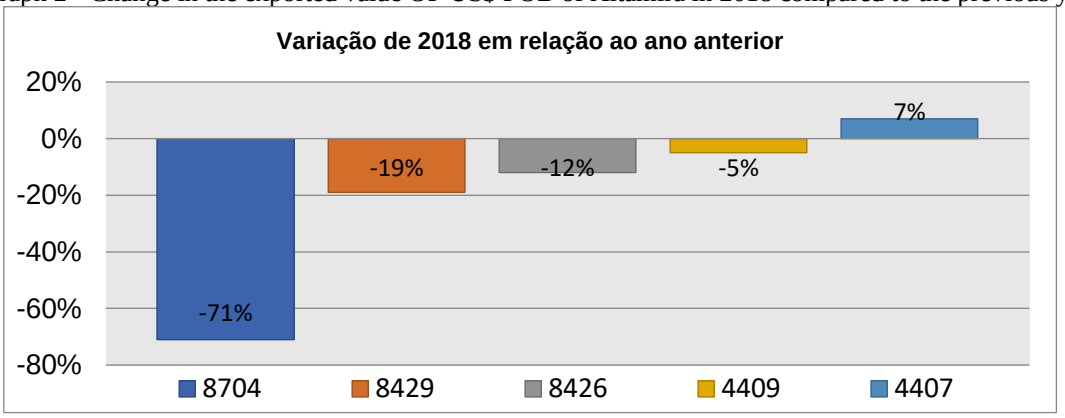
Below are the annually varying results tables of the main exported products, considering each code of the Harmonised System (SH4) selected:

Figure 1 - Change in the exported value OF US$ FOB of Altamira in 2017 compared to the previous year



Source: Adapted from the data provided by COMEX STAT

Graph 2 - Change in the exported value OF US$ FOB of Altamira in 2018 compared to the previous year



Source: Adapted from the data provided by COMEX STAT

In the following table, Altamira showed a loss of demand in the international market, this is expressed by the variation in -57.05% of the total revenue of all export sectors of the municipality:

Figure 3 - Total exported value US$ FOB per Altamira between 2017 and 2018

Source: Adapted from the data provided by COMEX STAT

4.2 ANALYSIS OF THE COMPETITIVENESS MATRIX

Altamira's competitiveness matrix in the following table, from the respective years 2017 and 2018, shows the representativeness of the exports of the municipality considering only the main exported products. Other remaining activities focus on low demand and low expression in values, therefore, they fall as stagnant in the horizontal axis of the matrix, while only 16.6% is in the axis called the dynamic sector.

DN: National product dynamism
GMP: Product Market Gains (X) in the current year
GMP-1: Product Market Gains (X) in the previous year

Table 4 - Competitiveness matrix of the municipality of Santarém in the period 2017 - 2018

Competitiveness Matrix							
Representativeness of the export tariff of the municipality of Altamira - PA							
Code SH4	**PRODUCT DESCRIPTION**	**DN**	**GMP**	**GMP-1**	**CLASSIFICATION**	**PARTICIPATION (%) 2018**	
8426	Bulldozers, angledozers, levelers, scrapers, mechanical shovels, excavators, loaders and loaders, compactors and compressor rollers or cylinders, self-propelled	15,15	96,24	74,55	**Very good**	7,7%	**7,7%**
8429	Khabres; cranes, including cable cranes; cranes, unloading and moving gantries, crane bridges, gantries, crane cars	-12,91	100	100	**In Decline**	30%	**75%**
8704	Motor vehicles for the transport of goods	-19,62	100	100	**In Decline**	45%	
4409	Wood (including clubs and beadings for floors, not assembled) profiled (with spikes, grooves, fillets, notches, chamfered, with V-joints, beaded, beaded or the like) along one or more edges, faces or ends, even flattened	2,74	0,47	0,57	**Missed Opportunities**	5,5%	**8,9%**
4407	Wood sawn or straightened lengthwise, cut or unrolled, even flattened, polished or joined by the ends, of a thickness greater than 6 mm	15,93	0,74	0,93	**Missed Opportunities**	3,4%	

Source: Adapted from the data provided by COMEX STAT

The table above is organized in such a way that one can observe the classification of each commodity, individually and in aggregate. The most relevant characteristic of activities classified as "missed opportunities" is the loss of market share, this means that at a time when national and international demand is high for a product or service, domestic production is below that of the defendant in that period to meet the quota, in this sense, two altamira activities were classified in this way, codes *SH4* 4409 and *SH4* 4407, which together accounted for 8.9% of export revenue in 2018.

As for the sector considered "optimal", the analysis of marketing factors and export value generated a favorable result, which means that the municipality presented a high level of diversification and sophistication of its internal market in the activity referring *to the code SH4* 8426, responsible for 7.7% of export revenue in this period. On the other hand, the observation made from the results is that the presence of only one product from the municipality with positive prominence in the matrix, reveals the internal inability in this interval to keep pace with the national production to meet the international demand of a wide variety of goods.

Finally, about 75% of export activities between 2017 and 2018 were classified as "declining", indicating that the demand of the foreign market for other products was not noticed by producers to the point of changing the direction to more attractive sectors, on the other hand, occupied space of former competitors, but in activities that tend to be less and less profitable over the years.

5 CONCLUSION

To analyze the main export exponents of the municipality of Altamira/PA from 2017 to 2018, bringing the importance of the regional and national market, it is possible to infer that the activity referring to the *code SH4* 8426 stood out in the export agenda, as it presented reasonable technological advances, but it is possible that there was a considerable delay in other local market activities in adapting to changes in external preferences, in the following years, as well as the long-term profit setback. Despite the high participation rate in "declining" sectors, producers may be investing in these productions with increasingly decreasing demand.

In this scenario, it is important to implement export promotion plans aimed at internal specialization and the expansion of the catalog of markets and customers abroad so that this generates new opportunities, unlike the ineffective production analyzed, where the supply of products did not meet what is expected or is outside what is desirable internationally, this is the importance of directing internal forces to profitable activities. In the same period, world exports gained in value from the sophistication of products and services, on the other hand, the countries that continue to depend on products concentrated in cast sectors are in the face of foreign trade and thus can remain if the principles of selective allocation for improvements through research and search for improvement do not take action, are important tools so that this framework does not remain in the following years.

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