

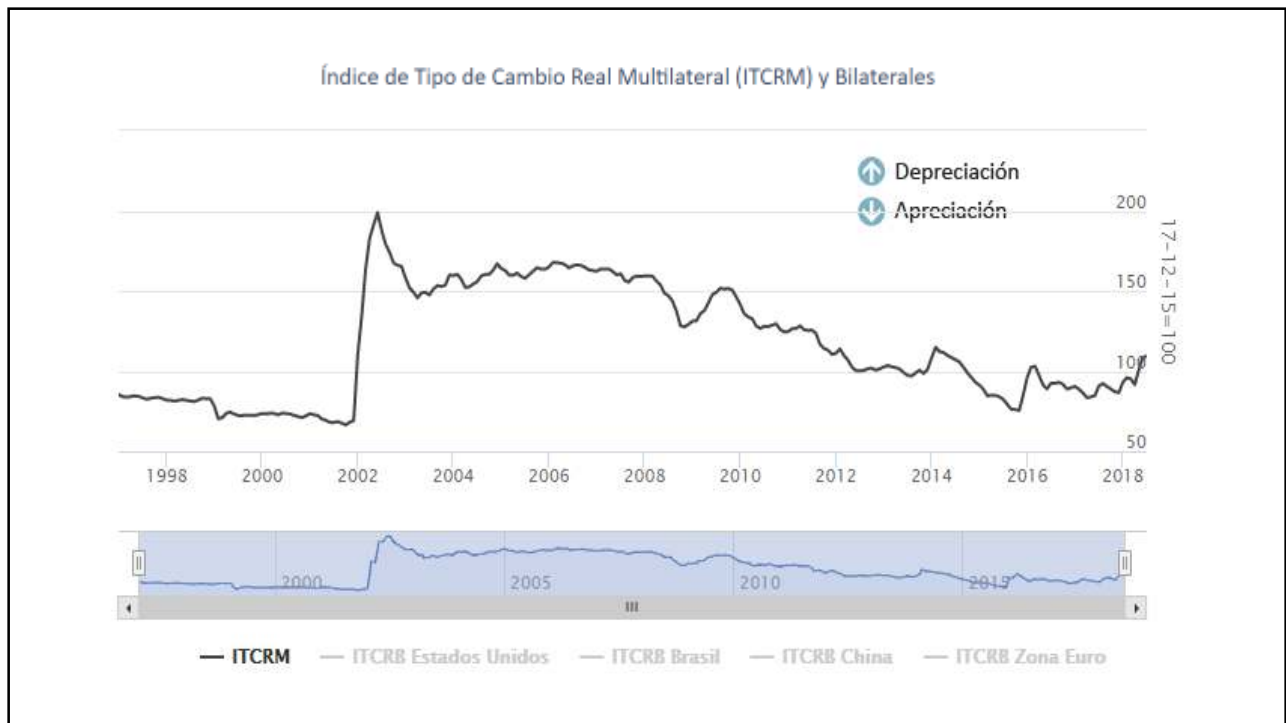
Requisitos para el despegue exportador argentino

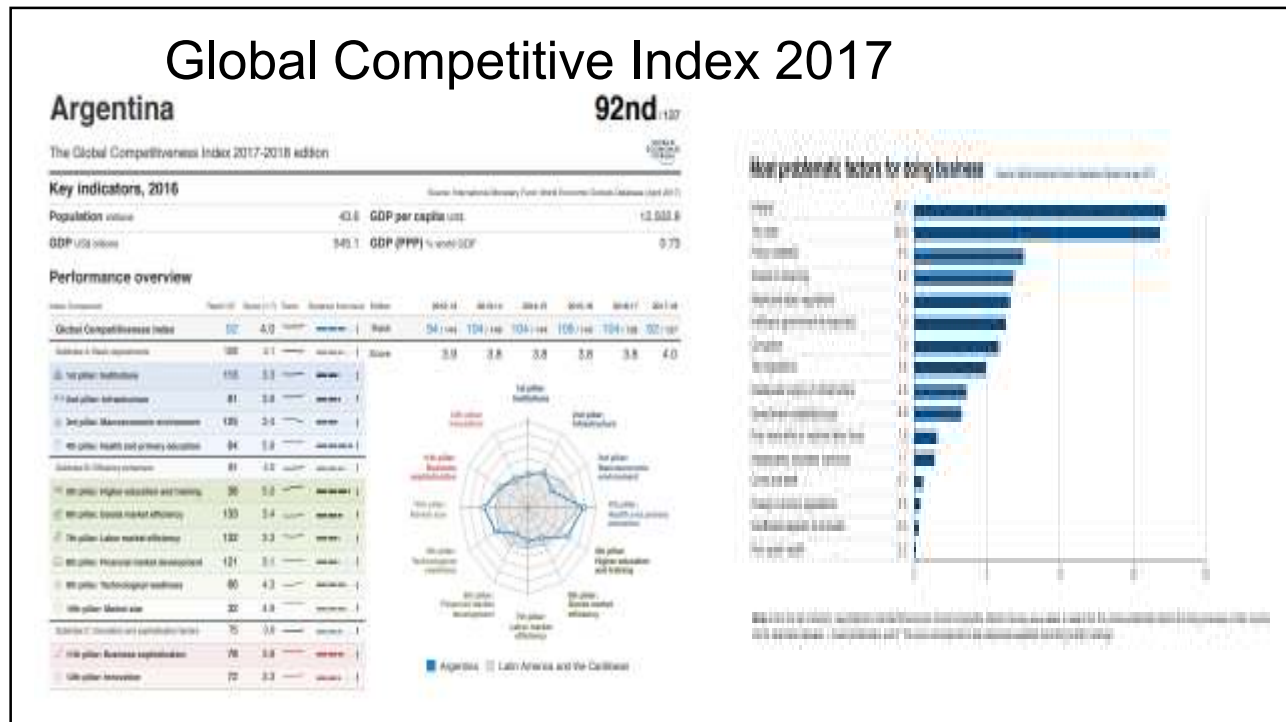
Marcelo Elizondo
Presidente del Capítulo Argentino de la International Society For Performance Improvement (ISPI)
Investigador y Profesor del ITBA
Director de la consultora DNI
Miembro Consultor del CARI

¿Que requiere Argentina para el despegue exportador?

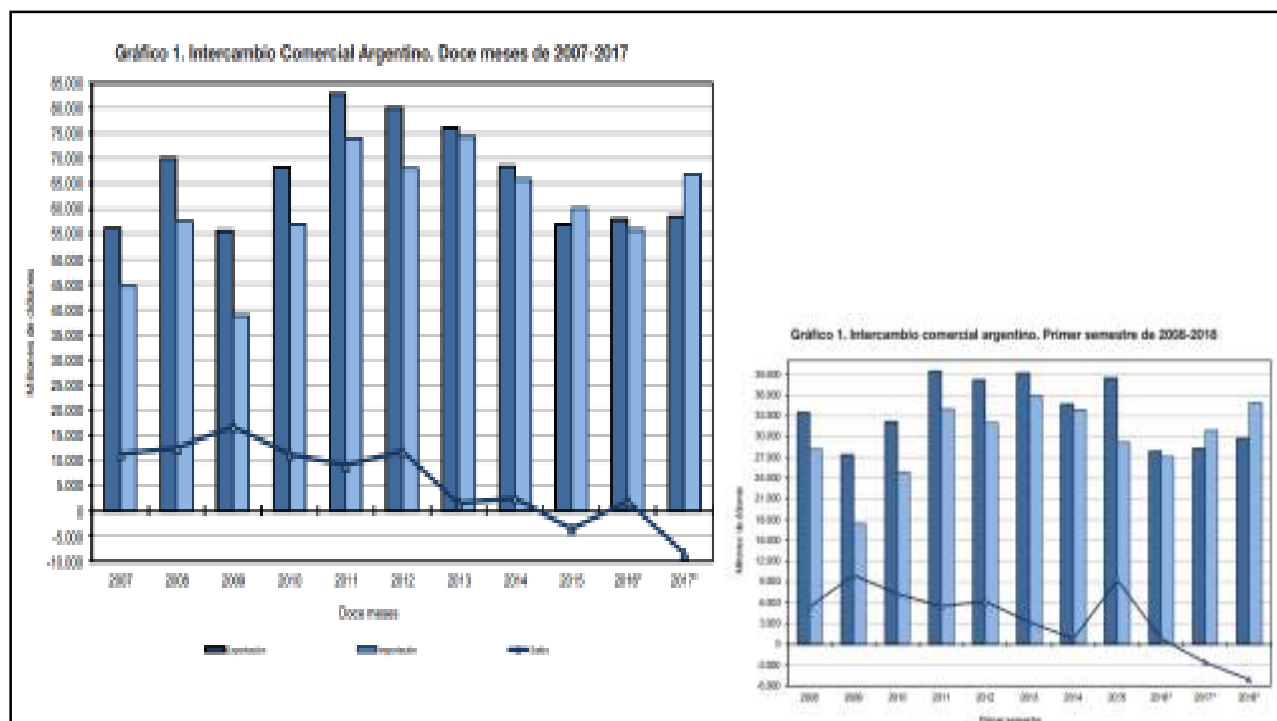
- Capital político
- Capital productivo
- Capital relacional
- Capital vincular
- Capital institucional
- Capital comercial

1. Capital político





2. Capital productivo



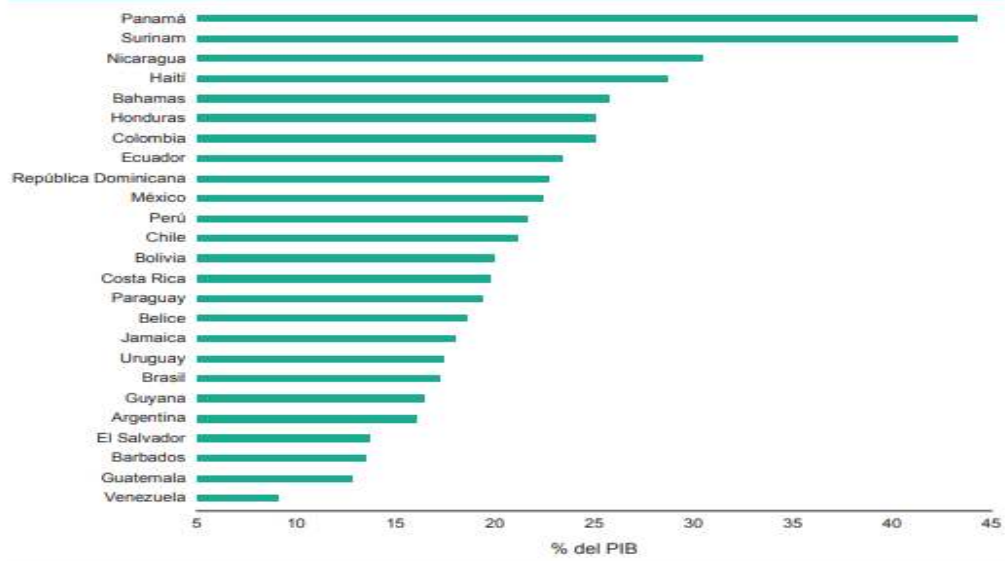
Exportaciones argentinas primeros 6 meses de 2018

Producto	Importe en millones de dólares
Cereales	4.121
Pescados	843
Semillas y frutos oleaginosos	690
Frutas frescas	502
Hortalizas y legumbres	335

Producto	Importe en millones de dólares
Residuos de la industria alimenticia	4.302
Grasas y aceites	1.926
Carnes y sus preparados	1.208
Preparados de hortalizas, legumbres y frutas	530
Bebidas alcohólicas	417
Piel y cueros	366
Productos de milinería y sus preparaciones	351
Productos lácteos	335

Producto	Importe en millones de dólares
Material de transporte terrestre	3.308
Productos químicos y conexos	2.095
Piedras, metales preciosos y sus manufacturas	1.307
Metales comunes y sus manufacturas	976
Máquinas y aparatos y material eléctrico	607
Materias plásticas y sus manufacturas	546

Producto	Importe en millones de dólares
Carburantes	769
Petróleo crudo	674
Gas de petróleo	181

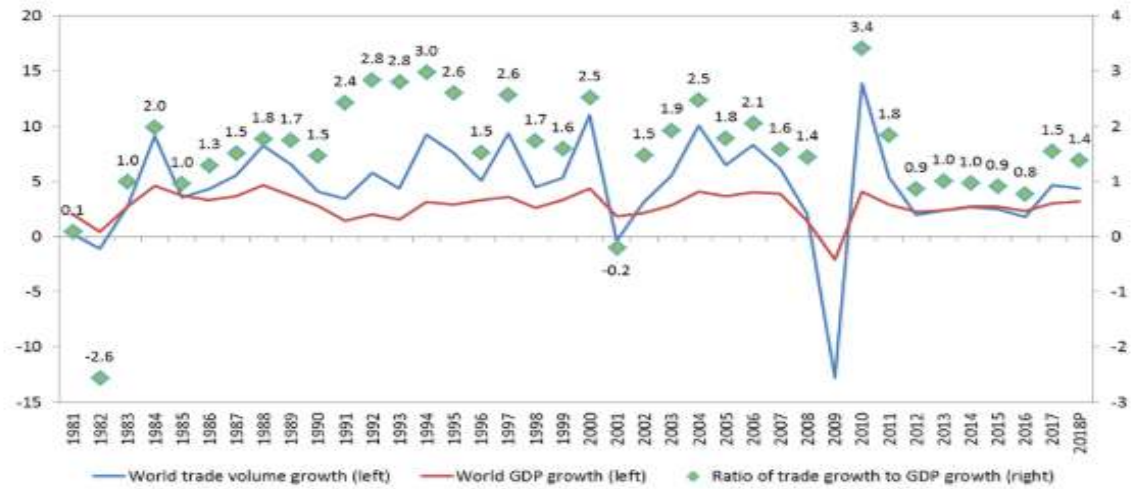
GRÁFICO 3.2 Tasas de inversión de diferentes países, 2017

Fuente: Cálculos del BID en base a FMI (2017c).

3. Capital relacional

Chart 2: Ratio of world merchandise trade volume growth to world real GDP growth, 1981-2018

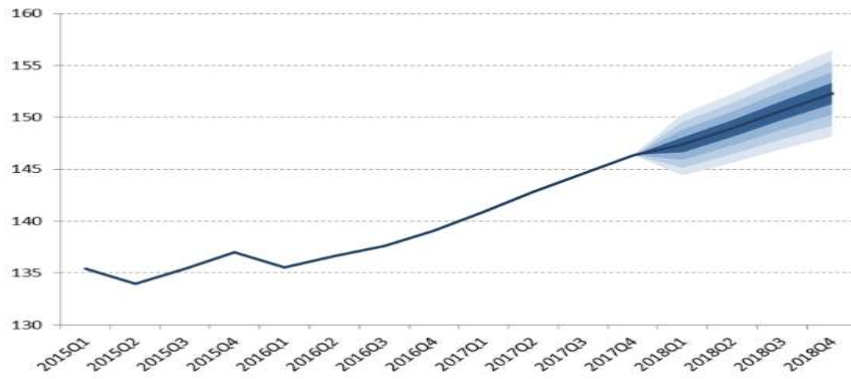
% change and ratio



Source: WTO and UNCTAD for trade, consensus estimates for GDP.

Chart 1: Volume of world merchandise trade, 2015Q1-2018Q4

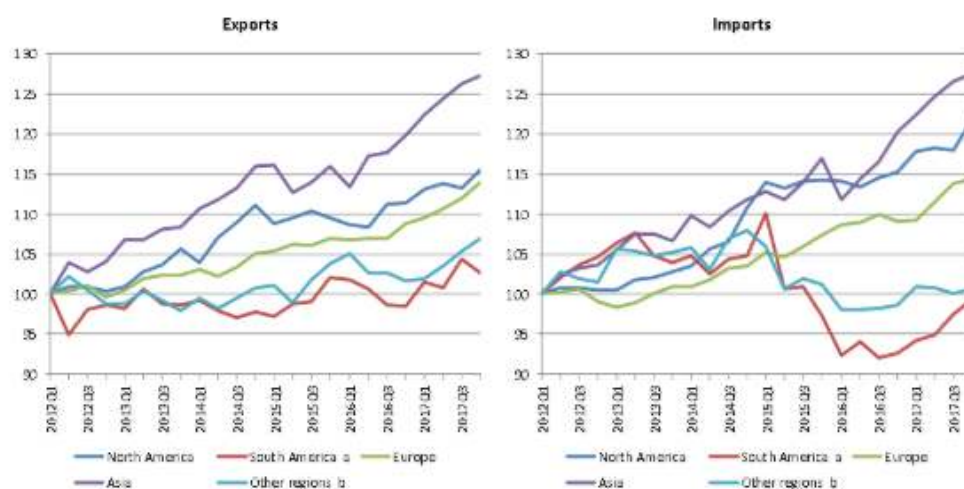
Seasonally adjusted volume index, 2005=100



Source: WTO and UNCTAD, WTO Secretariat estimates.

Chart 4: Merchandise exports and imports by region, 2012Q1-2017Q4

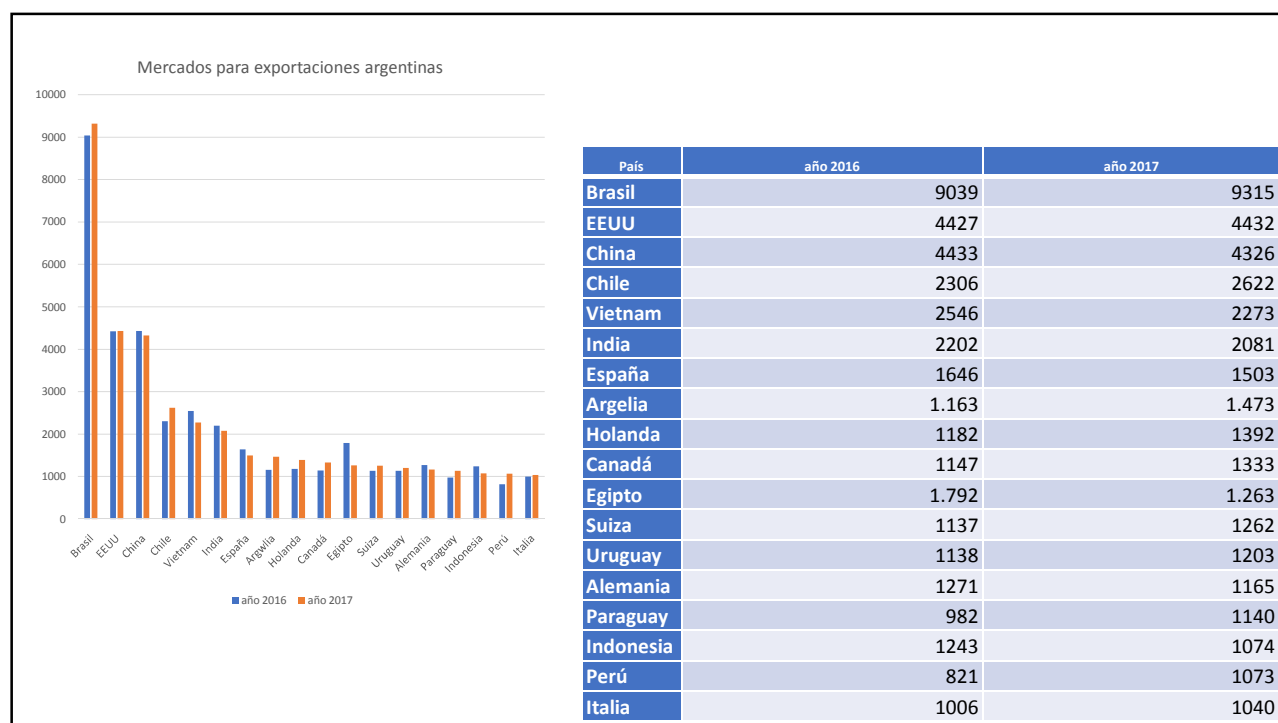
Volume index, 2012Q1=100



Appendix Table 3: Leading merchandise exporters and importers, 2017

Sbn and %

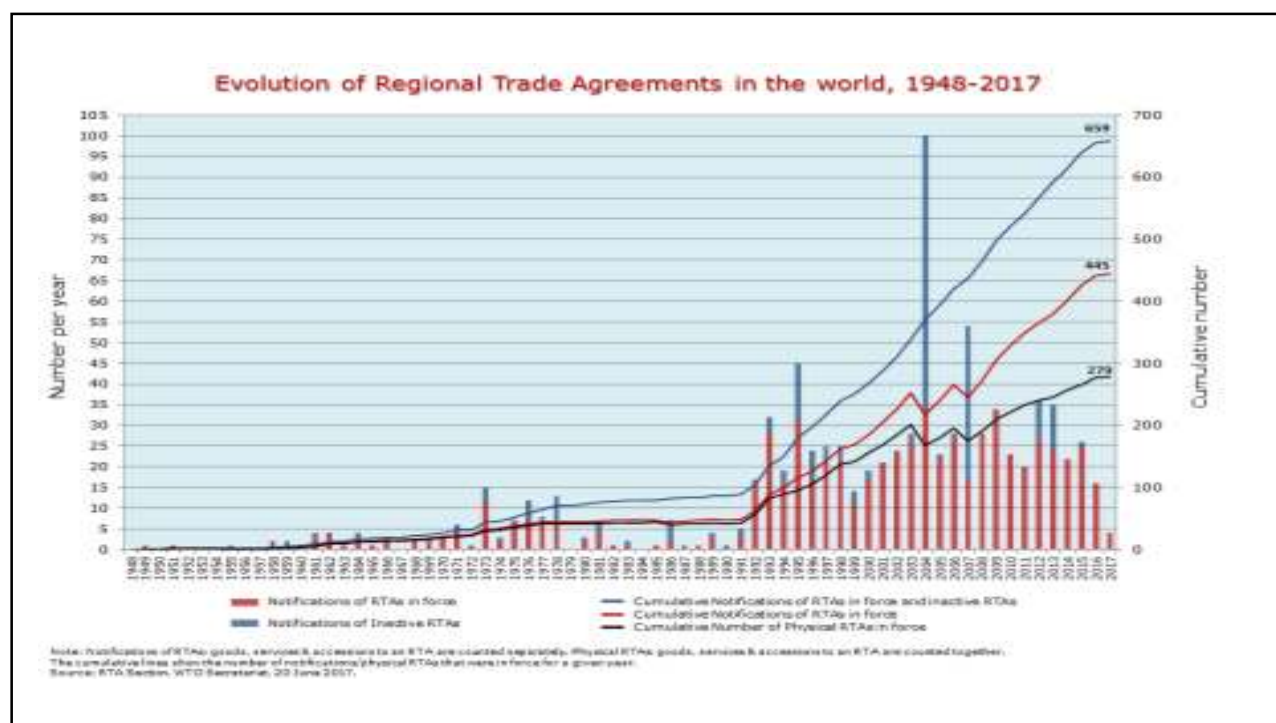
Rank	Exporters	Value	Share	Annual % change	Rank	Importers	Value	Share	Annual % change
1	China	2263	12.8	7.9	1	United States of America	2409	13.4	7.1
2	United States of America	1547	8.7	6.6	2	China	1842	10.2	16.0
3	Germany	1448	8.2	8.5	3	Germany	1167	6.5	10.5
4	Japan	698	3.9	8.3	4	Japan	672	3.7	10.6
5	Netherlands	652	3.7	14.1	5	United Kingdom	644	3.6	1.2
6	Korea, Republic of	574	3.2	15.8	6	France	625	3.5	9.2
7	Hong Kong, China	550	3.1	6.5	7	Hong Kong, China	590	3.3	7.8
	Domestic exports	18	...	-27.9		Retained imports a	138	...	6.2
	Re-exports	532	...	8.3					
8	France	535	3.0	6.7	8	Netherlands	574	3.2	13.7
9	Italy	506	2.9	9.6	9	Korea, Republic of	478	2.7	17.8
10	United Kingdom	445	2.5	8.6	10	Italy	453	2.5	11.2
11	Belgium	430	2.4	7.9	11	India	447	2.5	23.8
12	Canada	423	2.4	7.8	12	Canada	442	2.5	7.0
13	Mexico	409	2.3	9.5	13	Mexico	432	2.4	8.7
14	Singapore	373	2.1	10.4	14	Belgium	403	2.2	8.2
	Domestic exports	188	...	15.9					
	Re-exports	185	...	5.4					
15	United Arab Emirates a	360	2.0	20.4	15	Spain	351	1.9	12.7
16	Russian Federation	353	2.0	25.3	16	Singapore	328	1.8	12.3
						Retained imports c	142	...	22.7
17	Spain	321	1.8	10.5	17	Switzerland b	269	1.5	-0.5
18	Chinese Taipei	317	1.8	13.2	18	United Arab Emirates a	268	1.5	-1.1
19	Switzerland b	300	1.7	-1.1	19	China	259	1.4	12.5
20	India	298	1.7	13.0	20	Russian Federation d	238	1.3	24.1
21	Thailand	237	1.3	9.9	21	Turkey	234	1.3	17.7
22	Poland	231	1.3	14.0	22	Poland	230	1.3	16.8
23	Australia	231	1.3	19.9	23	Australia a	229	1.3	16.6
24	Saudi Arabia, Kingdom of a	218	1.2	18.8	24	Thailand	223	1.2	14.7
25	Malaysia	218	1.2	14.9	25	Viet Nam	212	1.2	21.0
26	Brazil	218	1.2	17.5	26	Malaysia	195	1.1	15.9
27	Viet Nam	214	1.2	21.4	27	Austria	176	1.0	11.5
28	Czech Republic	180	1.0	10.7	28	Czech Republic	162	0.9	13.2
29	Indonesia	169	1.0	16.5	29	Brazil	157	0.9	9.7
30	Austria	168	0.9	10.5	30	Indonesia	157	0.9	15.7
	Total of above e	14884	83.9	-		Total of above e	14866	82.5	-
	World e	17730	100.0	10.6		World e	18024	100.0	10.7



Resultados comerciales por región en 2017	Exportaciones argentinas en millones de dólares	Importaciones argentinas en millones de dólares
▪ Continente americano	24.667	33.060
▪ Sudamérica	17.290	22.484
▪ Asia	16.276	19.187
▪ Europa	11.122	12.742
▪ Asia Pacifico (APEC)	10.237	11.382
▪ Norteamérica	6.522	10.327
▪ África	4.675	1.058
▪ Oceanía	788	295

Previsión crecimiento PBI 2019 principales mercados		Previsión de crecimiento de algunos de los países mayores importadores del mundo	
Brasil	2,5	India	7,8
Estados Unidos	2,7	Filipinas	6,8
China	6,4	Vietnam	6,5
Chile	3,3	China	6,4
Vietnam	6,5	Indonesia	5,5
India	7,8	Egipto	5,5
España	2,2	Malasia	5
Argelia	2,7	Turquía	4
Holanda	2,4	Tailandia	3,8
Canadá	2	Hong Kong	3,2
Egipto	5,5	Australia	3,1
Suiza	2	Emiratos Árabes Unidos	3
Uruguay	3,1	México	3
Alemania	2	Corea del Sur	3
Paraguay	4,1		
Indonesia	5,5		
Perú	4		
Italia	1,1		

4. Capital institucional



América Latina (países seleccionados): acuerdos comerciales firmados y vigentes, según número de acuerdos y de socios comerciales

País	Acuerdos de libre comercio (ALC) (Cuenta simple)	Acuerdos de comercio preferencial (Cuenta simple)	Total de acuerdos	Acuerdos de libre comercio (ALC) (Cuenta por país)	Acuerdos de comercio preferencial (Cuenta por país)	Total de socios comerciales
Argentina	4	6	10	4	8	12
Bolivia (Estado Plurinacional de)	2	1	3	5	1	6
Brasil	4	5	9	4	7	11
Chile	16	4	20	52	4	56
Colombia	5	6	11	10	25	35
Ecuador	0	4	4	0	7	7
México	13	4	17	44	6	50
Paraguay	4	3	7	4	5	9
Perú	10	1	11	14	1	15
Uruguay	5	4	9	5	6	11
Venezuela (República Bolivariana de)	0	10	10	0	29	29

Fuente: Sistema de Información sobre Comercio Exterior de la Organización de los Estados Americanos (OEA) a enero de 2012.

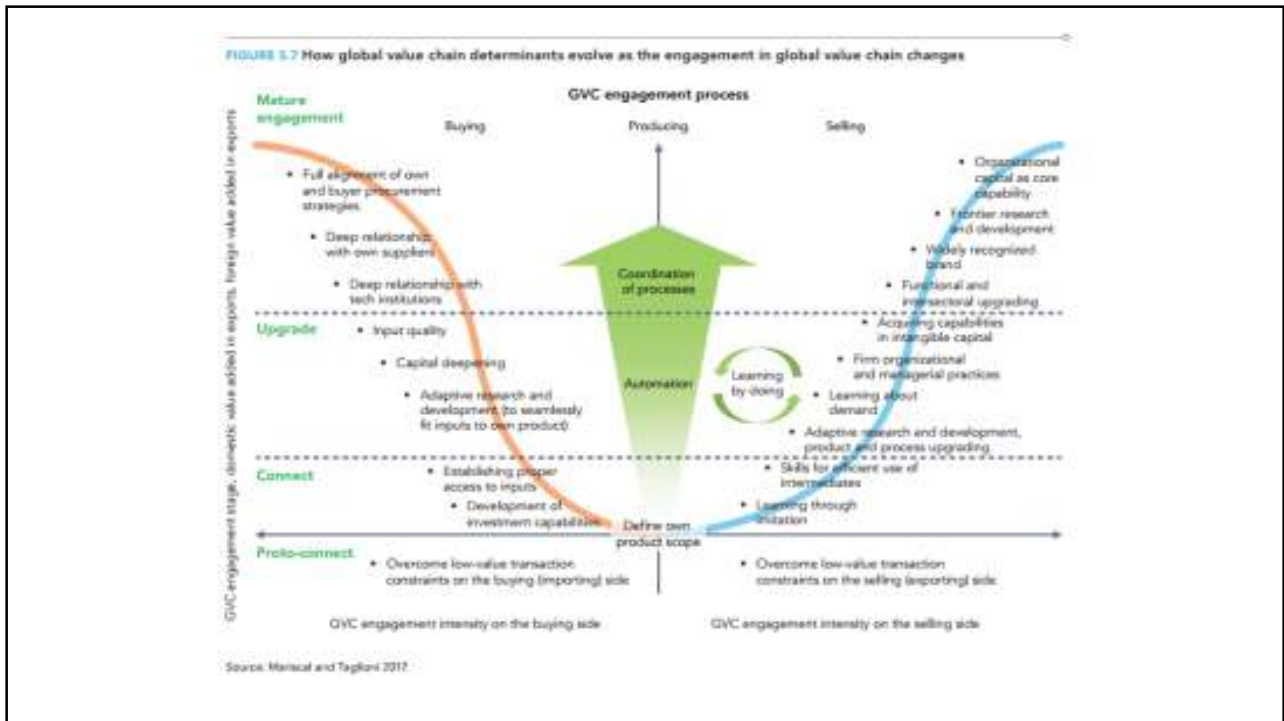
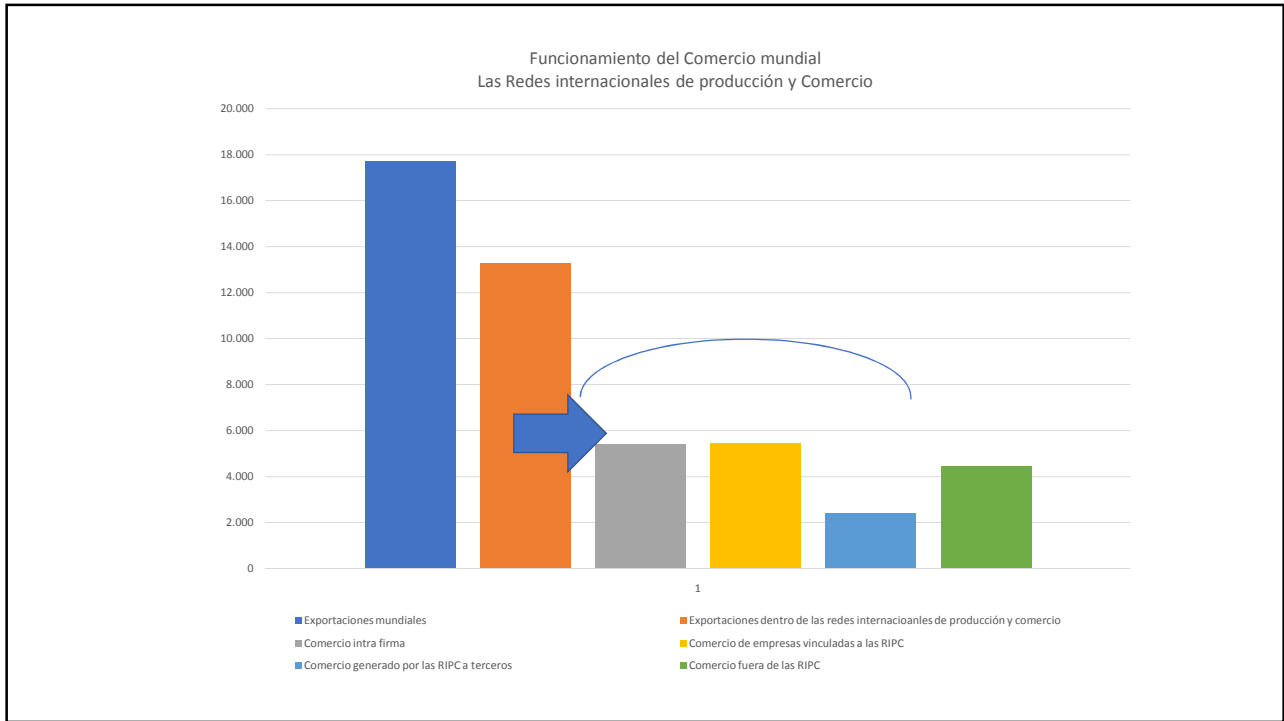
LOS ACUERDOS DE LIBRE COMERCIO EN AMÉRICA LATINA DESDE 1990. UNA EVALUACIÓN DE LA DIVERSIFICACIÓN DE EXPORTACIONES • ALFONSO DINGEMANS Y CÉSAR ROSS

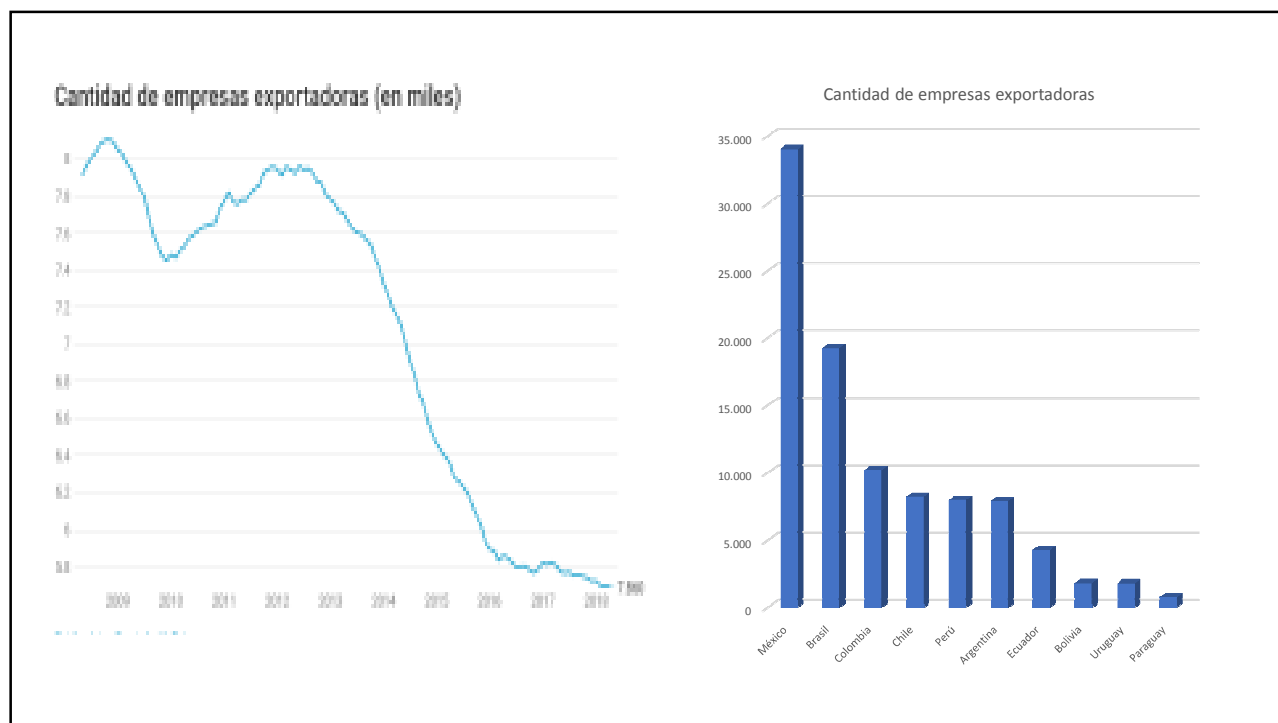
5. Capital vincular

- 69 of top 100 economic entities are corporations not countries
- Walmart, Apple, Shell richer than Russia, Belgium, Sweden
- British government told: stop supporting your corporations, support your people

Corporations have increased their wealth vis-à-vis countries according to new figures released by Global Justice Now. The campaign group found that 69 of the world's top economic entities are corporations rather than countries in 2015*. They also discovered that the world's top 10 corporations – a list that includes Walmart, Shell and Apple – have a combined revenue of more than the 180 'poorest' countries combined in the list which include Ireland, Indonesia, Israel, Colombia, Greece, South Africa, Iraq and Vietnam.

Rank	Type	Name	Revenue (USD)
1	Government	United States	325100000000
2	Government	China	242600000000
3	Government	Germany	151500000000
4	Government	Japan	143900000000
5	Government	France	125300000000
6	Government	United Kingdom	110100000000
7	Government	Italy	87600000000
8	Government	Brazil	63100000000
9	Government	Canada	58500000000
10	Corporation	Walmart	48213000000
11	Government	Spain	47360000000
12	Government	Australia	42570000000
13	Government	Netherlands	33650000000
14	Corporation	State Grid	32960100000
15	Corporation	China National Petroleum	29927100000
16	Corporation	Sinopec Group	29434400000
17	Government	Korea, South	29130000000
18	Corporation	Royal Dutch Shell	27215600000
19	Government	Mexico	25960000000
20	Government	Sweden	25080000000
21	Corporation	Exxon Mobil	24620400000
22	Corporation	Volkswagen	23660000000
23	Corporation	Toyota Motor	23659200000
24	Government	India	23600000000
25	Corporation	Apple	23371500000
26	Government	Belgium	22680000000
27	Corporation	BP	22596200000
28	Government	Switzerland	22190000000
29	Government	Norway	22020000000
30	Government	Russia	21630000000
31	Corporation	Berkshire Hathaway	21082100000
32	Government	Venezuela	20340000000
33	Government	Saudi Arabia	19300000000
34	Corporation	McKesson	19248700000
35	Government	Austria	18920000000
36	Corporation	Samsung Electronics	17744000000
37	Government	Turkey	17540000000
38	Corporation	Glencore	17049700000
39	Corporation	Industrial & Commercial Bank of China	16722700000
40	Corporation	Daimler	16580000000
41	Government	Denmark	16170000000
42	Corporation	UnitedHealth Group	15710700000
43	Corporation	CVS Health	15329800000
44	Corporation	EOG Group	15259100000
45	Corporation	General Motors	15235600000
46	Corporation	Ford Motor	14955800000
47	Corporation	China Construction Bank	14791100000
48	Corporation	AT&T	14680100000
49	Corporation	Total	143421000000
50	Government	Argentina	143400000000
51	Corporation	Hon Hai Precision Industry	141213000000
52	Corporation	General Electric	140389000000
53	Corporation	China State Construction Engineering	140159000000
54	Corporation	AmerisourceBergen	135962000000
55	Corporation	Agricultural Bank of China	133419000000
56	Corporation	Verizon	131620000000
57	Government	Finland	131400000000
58	Corporation	Chevron	131118000000
59	Corporation	EDN	129277000000
60	Corporation	AXA	129250000000
61	Government	Indonesia	123300000000
62	Corporation	Allianz	122948000000
63	Corporation	Bank of China	122337000000
64	Corporation	Honda Motor	121624000000
65	Corporation	Japan Post Holdings	118762000000
66	Corporation	Cooca	116199000000
67	Corporation	BNP Paribas	111531000000
68	Corporation	Fammie Mae	110359000000
69	Corporation	Ping An Insurance	110308000000
70	Government	United Arab Emirates	110100000000
71	Corporation	Kroger	109830000000
72	Corporation	Société Générale	107736000000
73	Corporation	Amazon.com	107006000000
74	Corporation	China Mobile Communications	106761000000
75	Corporation	SABC Motor	106684000000
76	Corporation	Walgreens Boots Alliance	103444000000
77	Corporation	HP	103355000000
78	Corporation	Assicurazioni Generali	102567000000
79	Corporation	Cardinal Health	102531000000
80	Corporation	BMW	102248000000
81	Corporation	Expens Scripts Holding	101752000000
82	Corporation	Nissan Motor	101536000000
83	Corporation	China Life Insurance	101274000000
84	Corporation	J.P. Morgan Chase	101006000000
85	Corporation	Caixam	99464000000
86	Corporation	China Railway Engineering	99435000000
87	Corporation	Petrobras	97314000000
88	Corporation	Trafalgar Group	97237000000
89	Corporation	Nippon Telegraph & Telephone	96134000000
90	Corporation	Boeing	96114000000
91	Corporation	China Railway Construction	95652000000
92	Corporation	Microsoft	93580000000
93	Corporation	Bank of America Corp.	93056000000
94	Corporation	ENI	92985000000
95	Corporation	Nestlé	92285000000
96	Corporation	Wells Fargo	90033000000
97	Government	Portugal	89940000000
98	Corporation	HSBC Holdings	89061000000

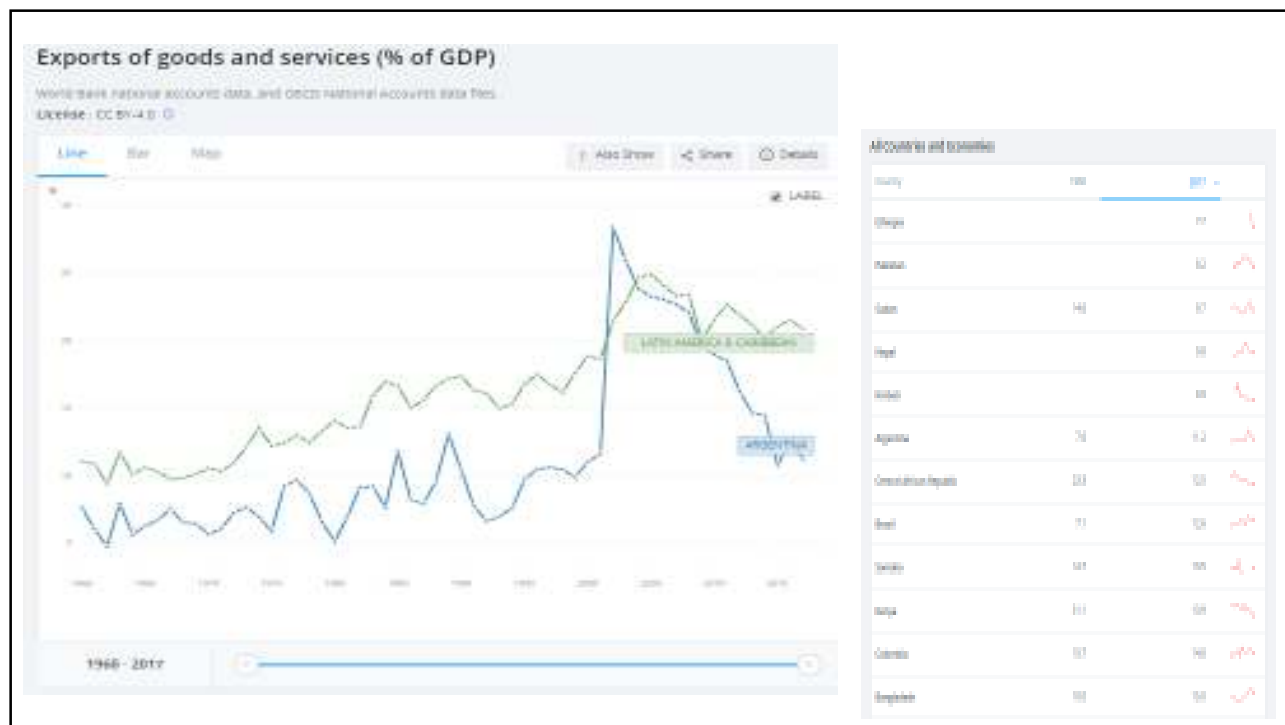


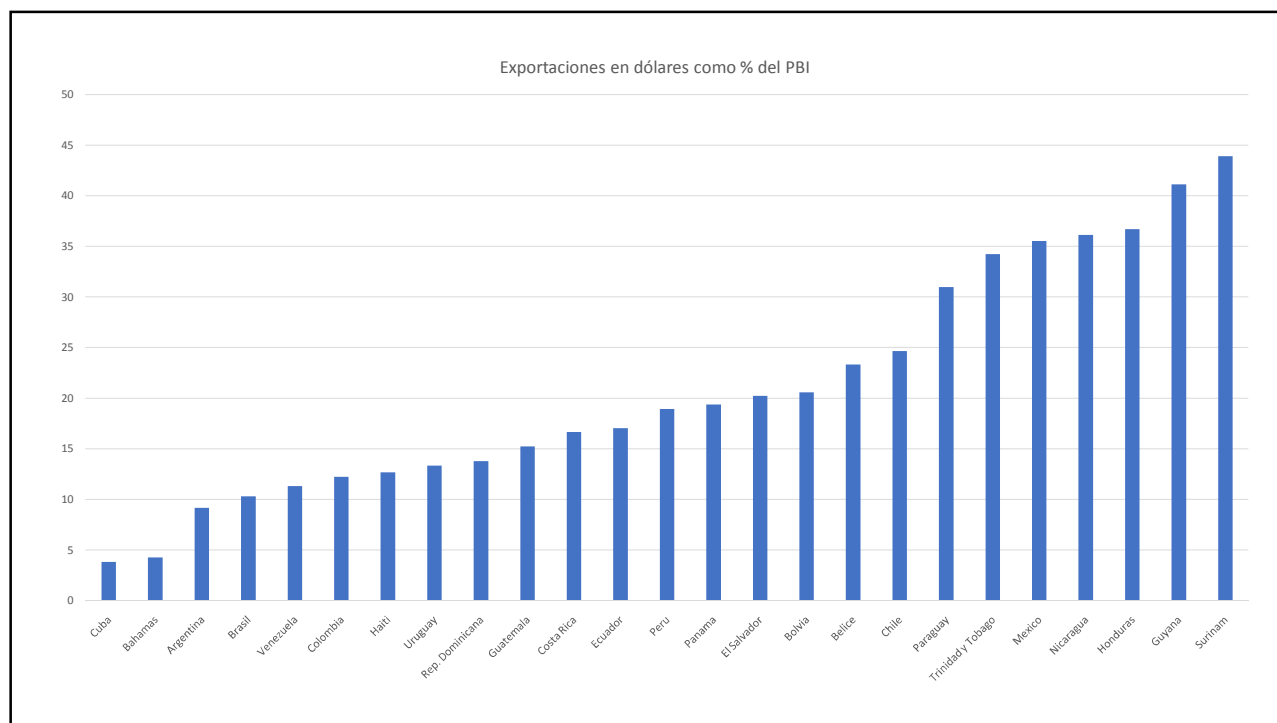


5 atributos competitivos para las empresas

- ✓ Estrategias
- ✓ Valor (calidad, diferenciación, innovación, conocimiento, escala)
- ✓ Arquitecturas vinculares (CGV)
- ✓ Reputación
- ✓ Capacidad de administración de ambientes

5. Capital comercial





Requisitos para el despegue exportador

- ✓ Capital Político
- ✓ Capital productivo
- ✓ Capital Relacional
- ✓ Capital Vincular
- ✓ Capital Institucional
- ✓ Capital Comercial

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