

SESSÃO 10
CADEIAS DE
ABASTECIMENTO GLOBAIS

SUMÁRIO

- ❖ Porquê cadeias de abastecimento globais?
- ❖ A tipologia de Gary Gereffi
- ❖ Expansão das cadeias de abastecimento globais
- ❖ O caso da Clark's em Portugal
- ❖ Gestão das cadeias de abastecimento globais
- ❖ Riscos das cadeias de abastecimento globais
- ❖ Implicações para o Desenvolvimento

OFFSHORING E OUTSOURCING

Internalização Nacional (Não há <i>Outsourcing</i> nem <i>Offshoring</i>)	<i>Offshoring</i> 'Cativo' (Actividades Internalizadas Internacionalmente)
<i>Outsourcing</i> (Externalização das Actividades)	<i>Outsourcing</i> Internacional

A TIPOLOGIA DE GEREFFI

- ***Buyer-driven Commodity Chains***

Estabelecidas por grandes cadeias de retalho

- ***Industry-driven Commodity Chains***

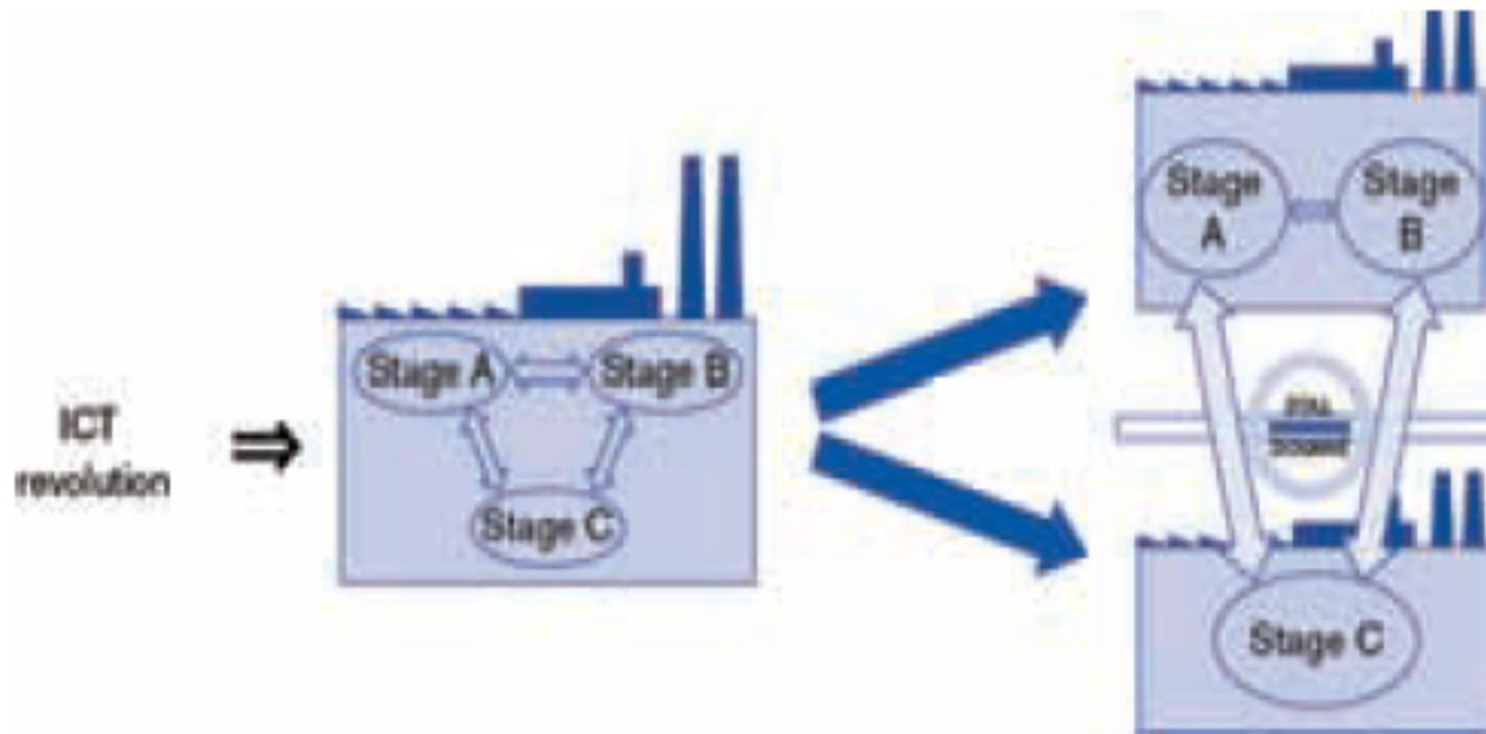
Lideradas por fabricantes e *brands* em indústrias de montagem (Automóvel, Electrodomésticos, Computadores...)

CADEIAS DE ABASTECIMENTO GLOBAIS: PERSPECTIVA HISTÓRICA

FACTORES DE DESENVOLVIMENTO

- ✓ Diferenças de custos
- ✓ Liberalização do comércio Mundial
- ✓ Redução custos de transportes e comunicações
- ✓ Desenvolvimento Tecnologias Informação
- ✓ Melhorias no controlo e desagregação dos processos de produção
- ✓ Desenvolvimento de Zonas Francas de Exportação
- ✓ Redefinição das fronteiras das empresas
- ✓ Papel dos Retalhistas
- ✓ Especialização Dinâmica

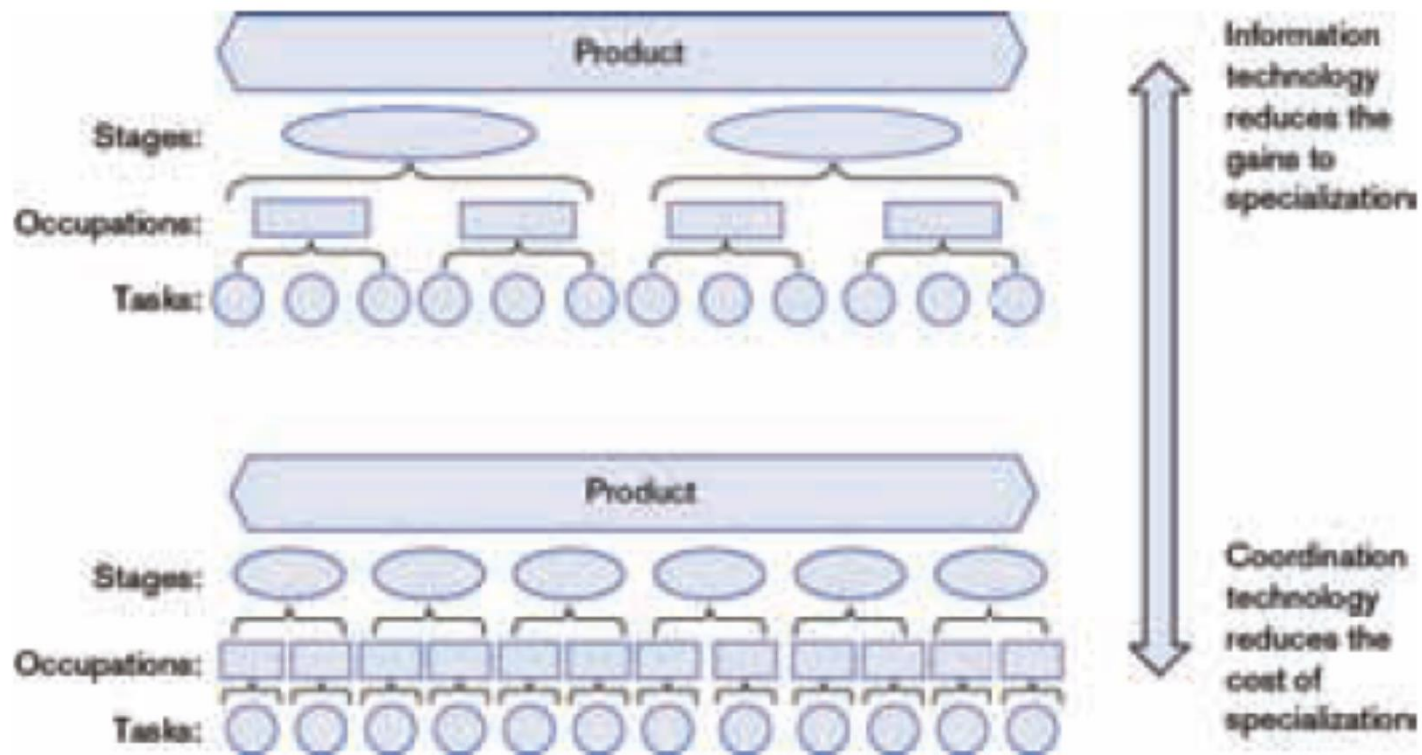
DESCONCENTRAÇÃO GEOGRÁFICA DA CADEIA: 1970-1980



Source: Derived from Baldwin (2011a).

Fonte: Baldwin (2013)

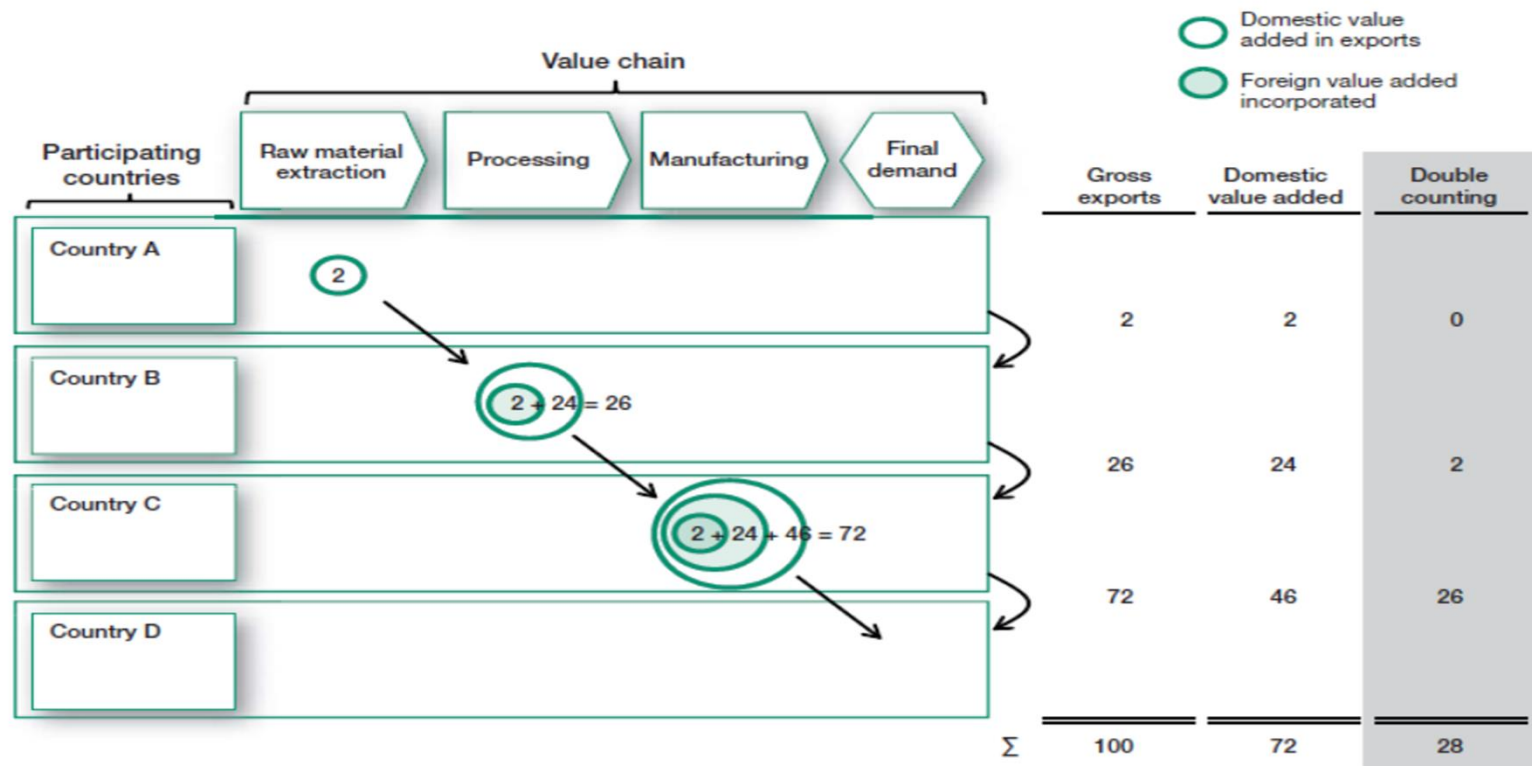
DESCONCENTRAÇÃO GEOGRÁFICA DA CADEIA: 2000-2010



Fonte: Baldwin (2013)

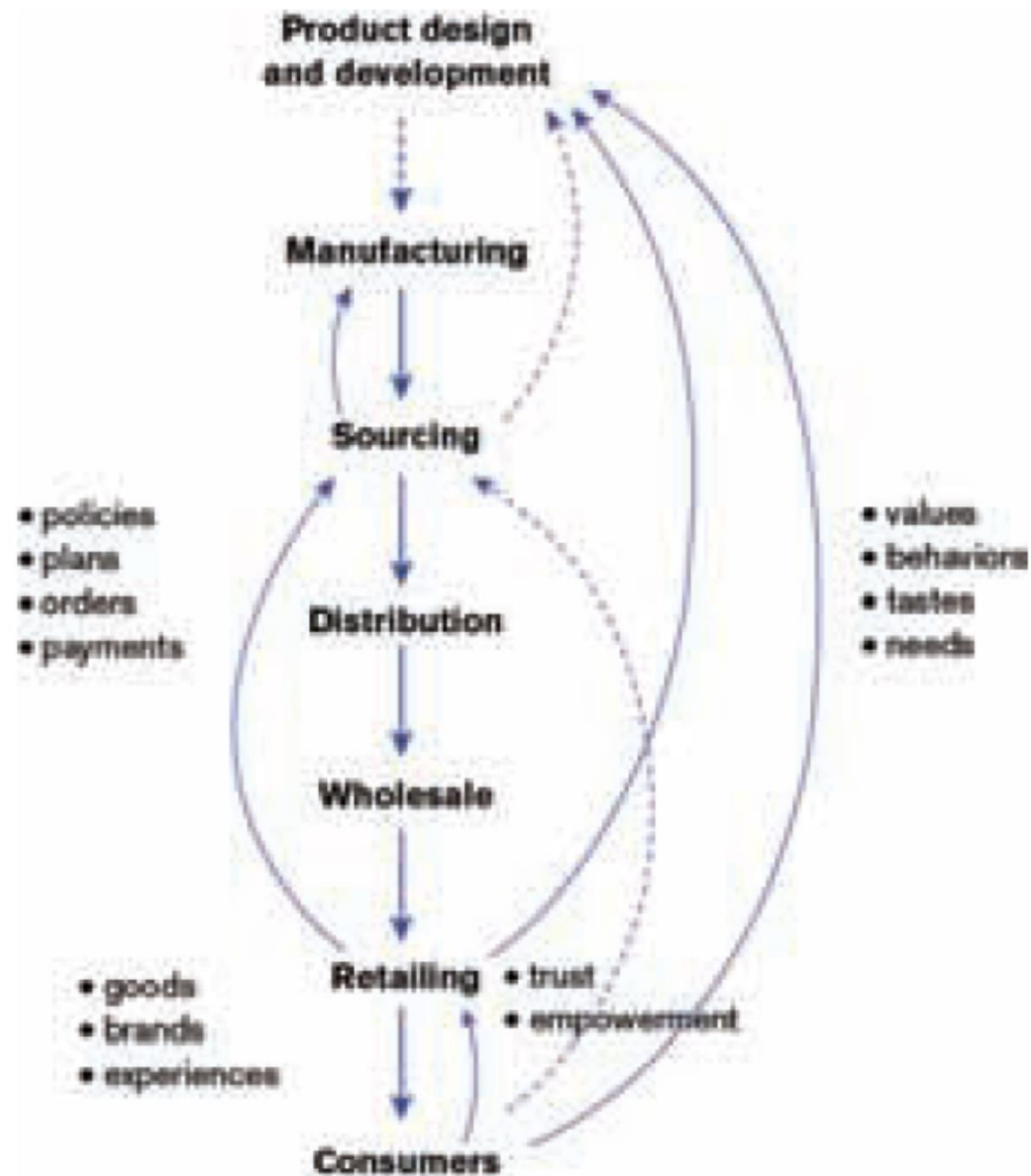
CADEIAS DE VALOR GLOBAIS: EM QUE CONSISTEM? COMO FUNCIONAM?

Figure IV.1. Value added trade: how it works



Source: UNCTAD.

ESTRUTURA DA CADEIA DE ABASTECIMENTO GLOBAL: UM EXEMPLO

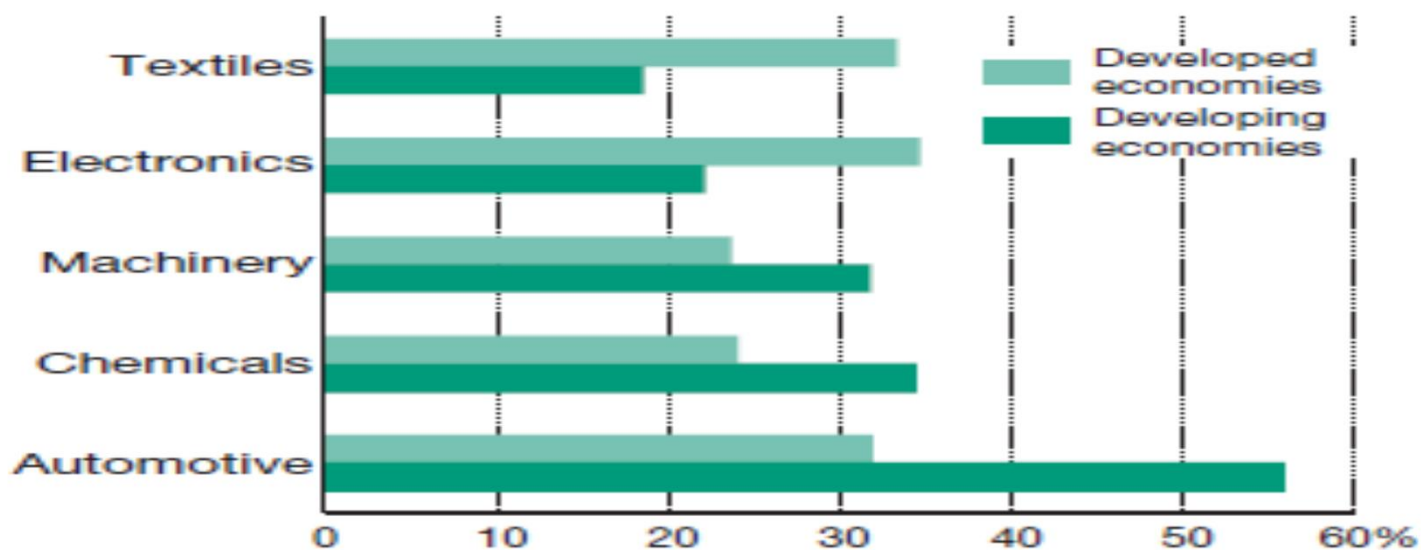


Fonte: Weil 2013

A IMPORTÂNCIA DAS CVG

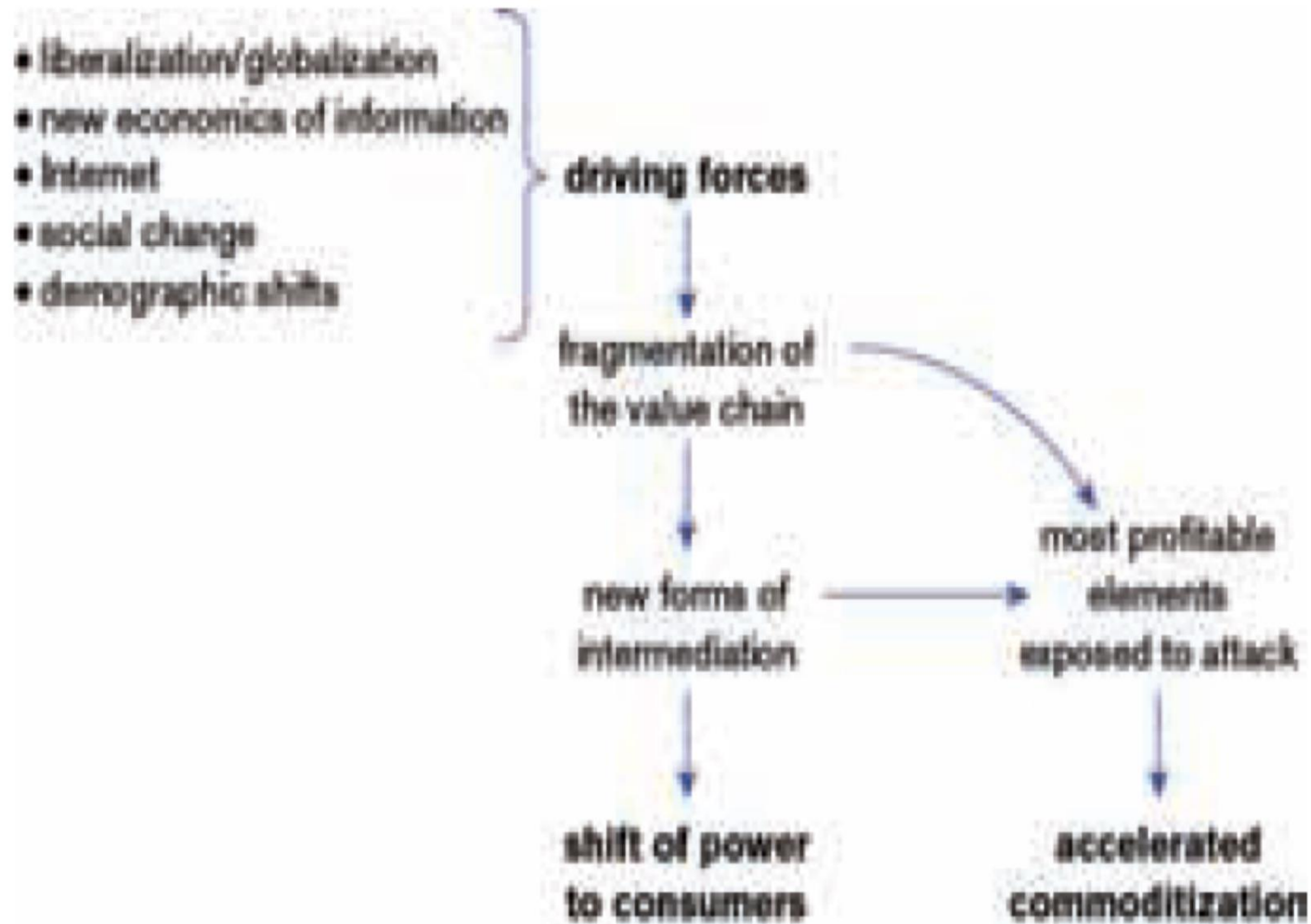
- ❑ Cerca de 60% do comércio mundial respeita a produtos intermédios.
- ❑ Esta fragmentação da produção tem lugar no âmbito de cadeias de valor (designadas por CV) envolvendo o fabrico de produtos intermédios e a sua integração em produtos finais.
- ❑ As CV correspondem a sistemas de produção internacionais correspondentes a sistemas complexos ou a cadeias sequenciais, cujo âmbito pode ser global (CVG), regional ou envolver apenas 2 países.
- ❑ As CVG são tipicamente organizadas e coordenadas por Empresas Multinacionais.
- ❑ As CVG são particularmente relevantes nas indústrias automóvel, de material electrónico, de maquinaria e de têxteis e vestuário.

Figure IV.5. Share of foreign value added in exports, developed and developing economies, selected industries, 2010

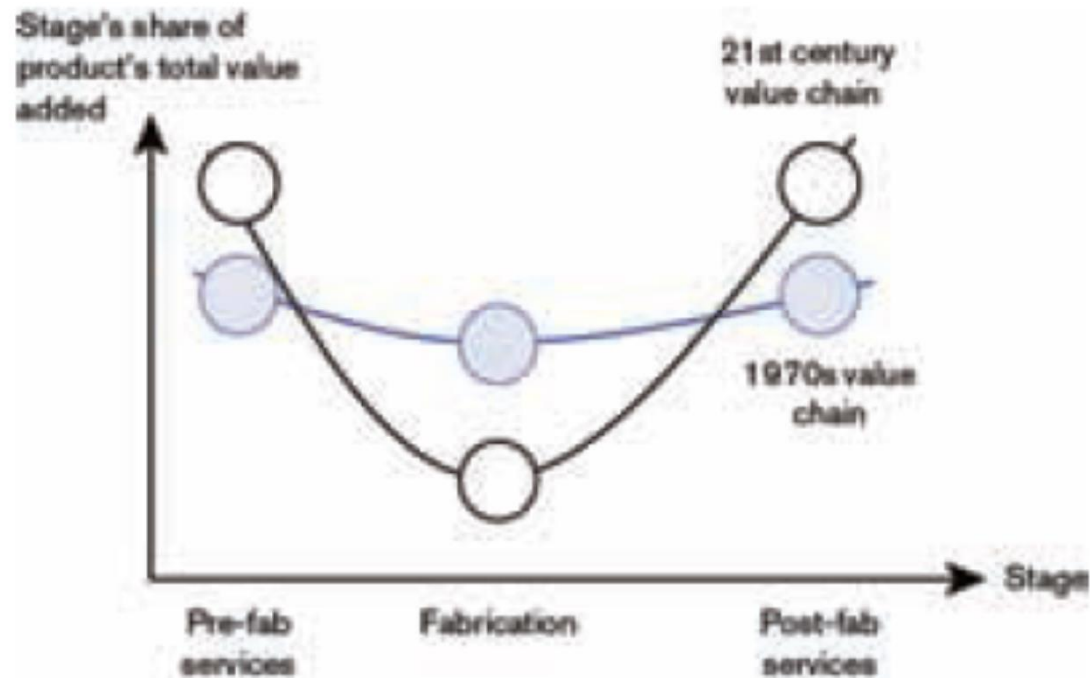


Source: UNCTAD-Eora GVC Database.

DINÂMICAS DE MUDANÇA NAS CADEIAS DE ABASTECIMENTO GLOBAIS



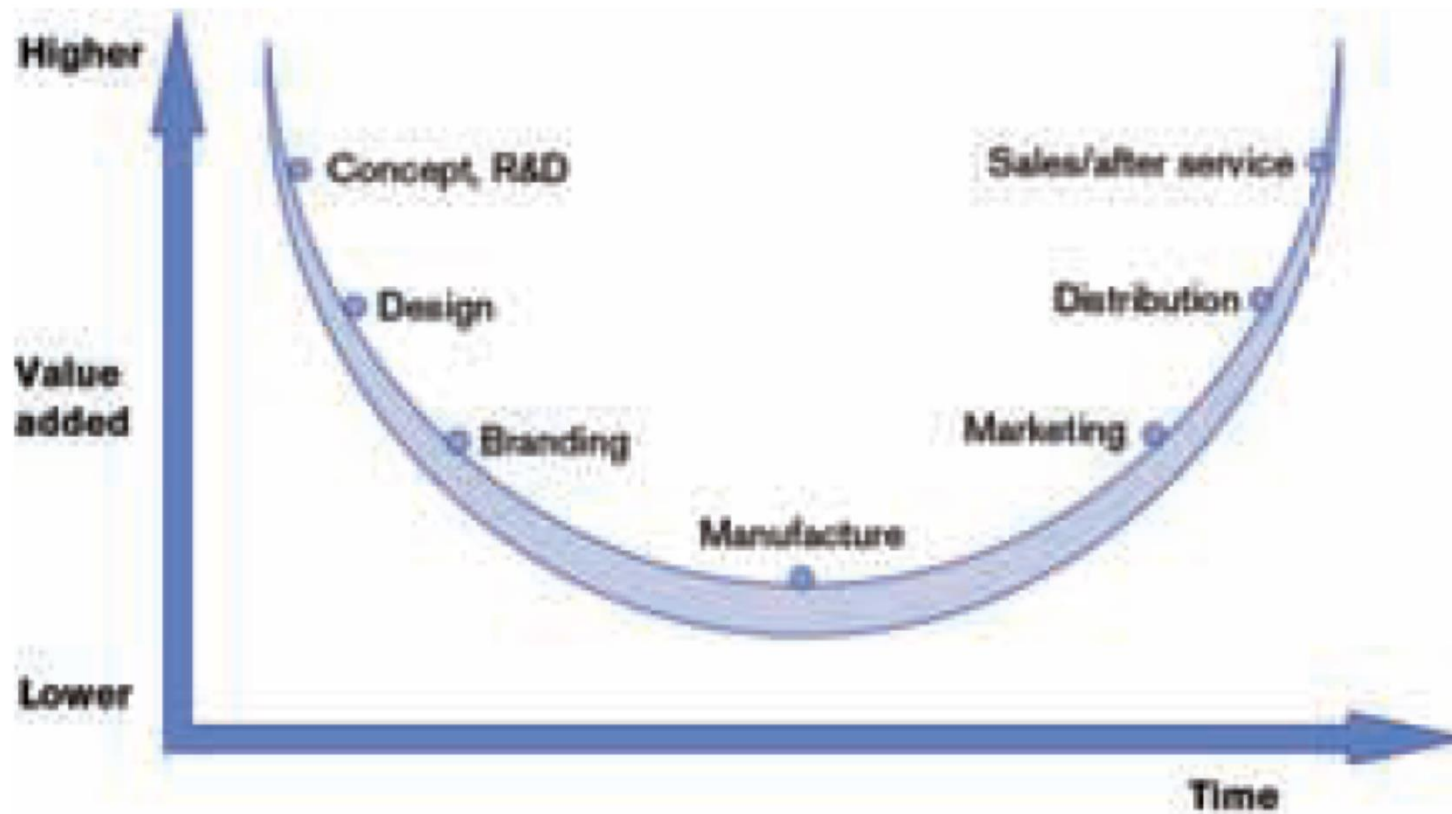
SMILING CURVE (STAN SHIH): PERSPECTIVA HISTÓRICA



Fonte: Baldwin (2013)

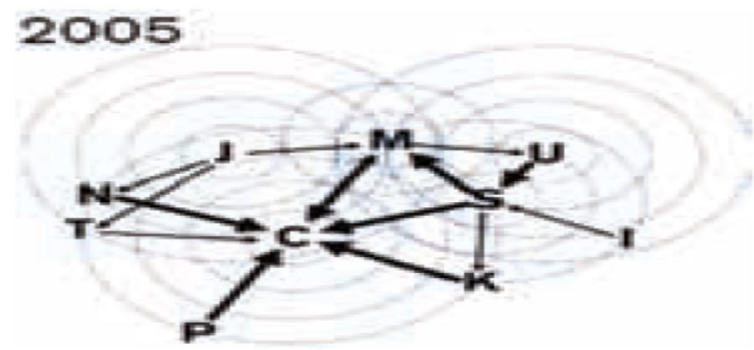
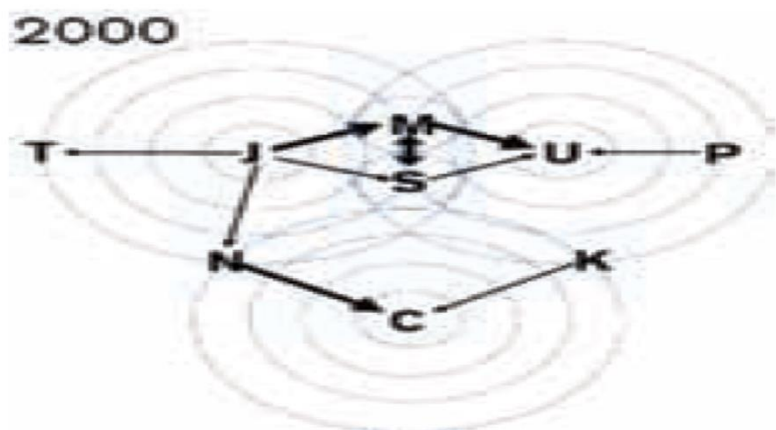
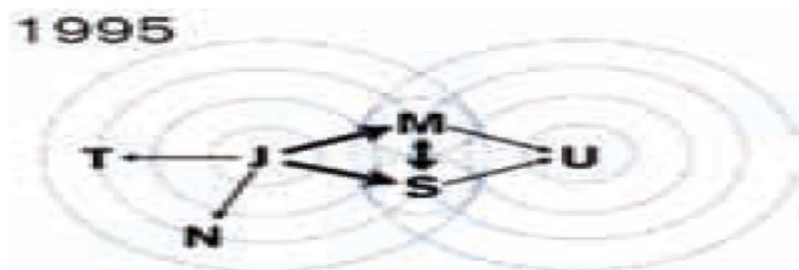
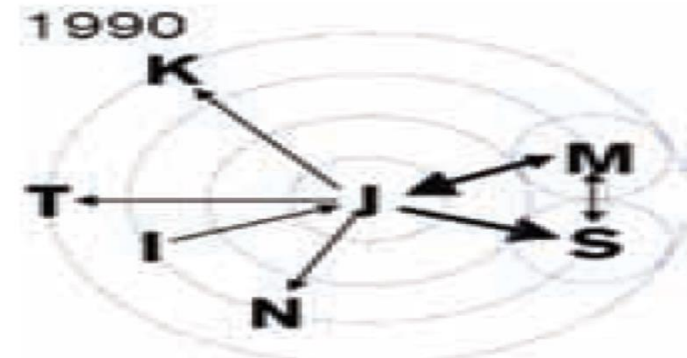
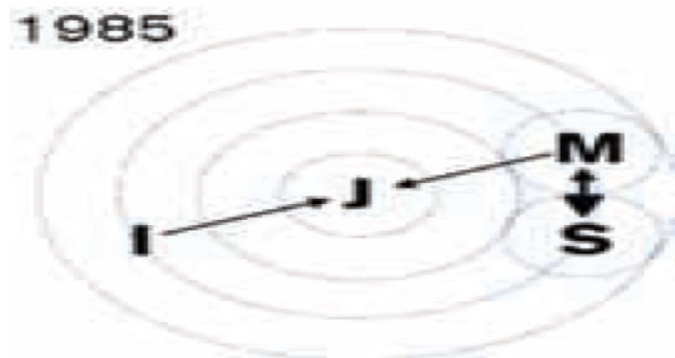
SMILING CURVE (STAN SHIH): NÍVEL DE VALOR ACRESCENTADO

FIGURE 2.3: Stan Shih's Smile Curve



Source: Adapted from Business Week Online Extra, May 16, 2005.

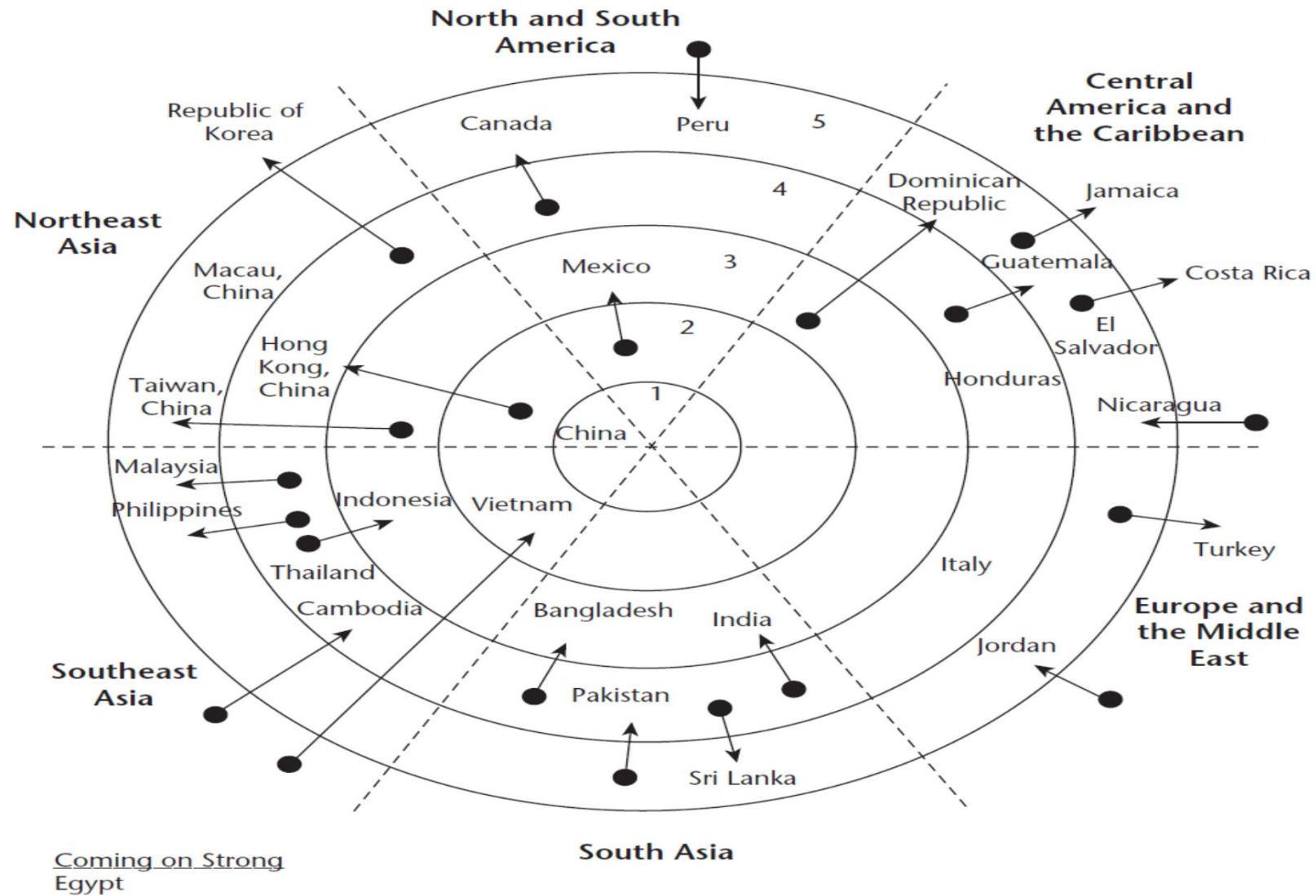
Fonte: Low (2013)



C: China, I: Indonesia, J: Japan, K: Rep. of Korea, M: Malaysia, N: Chinese Taipei, P: Philippines, S: Singapore, T: Thailand, U: United States

Fonte: Escaith & Inomata (2013)

Figure 5A.1 Shifts in Regional Structure of U.S. Apparel Imports, 1996–2008



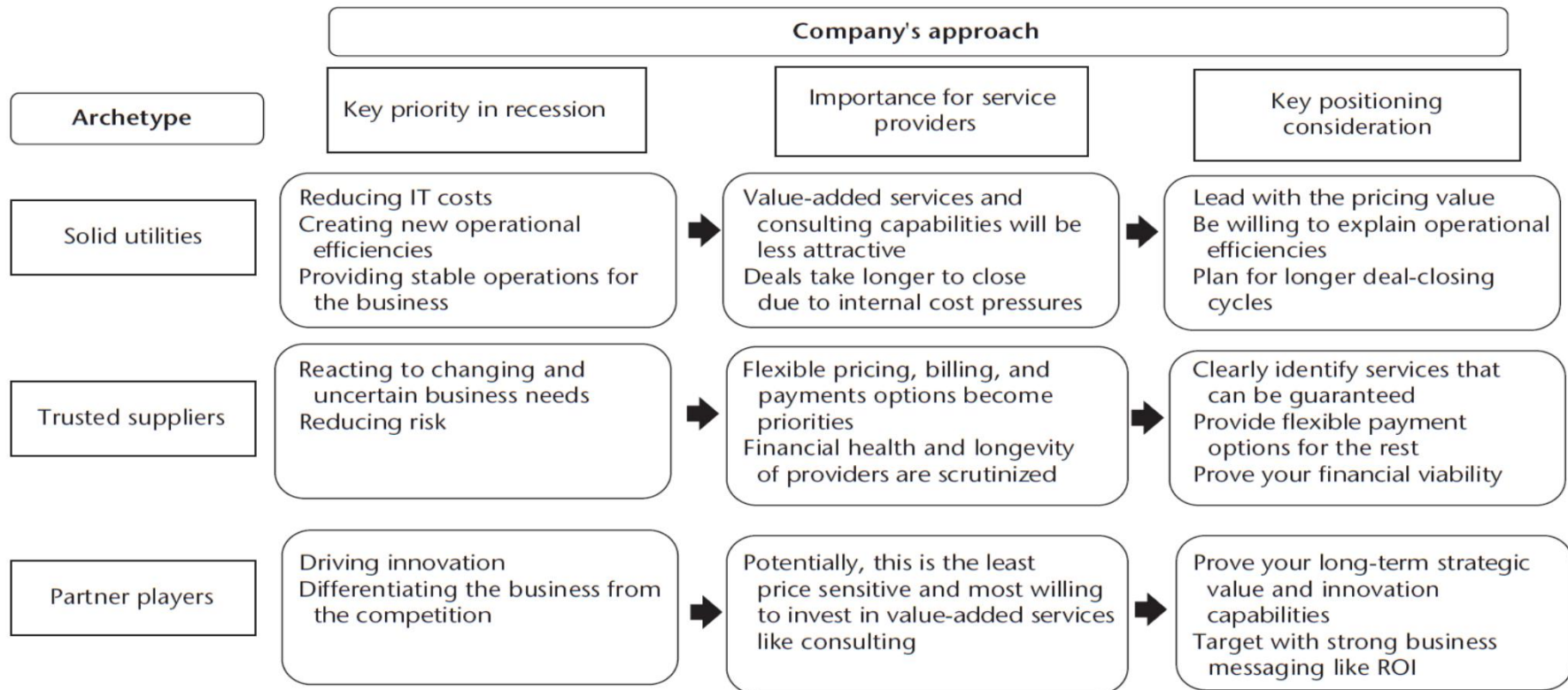
Source: United States International Trade Commission (USTIC); U.S. imports for consumption, customs value: SITC 84, rev. 3.

Fonte: Gereffi & Frederick (2010)

Cadeias de valor e resposta à crise

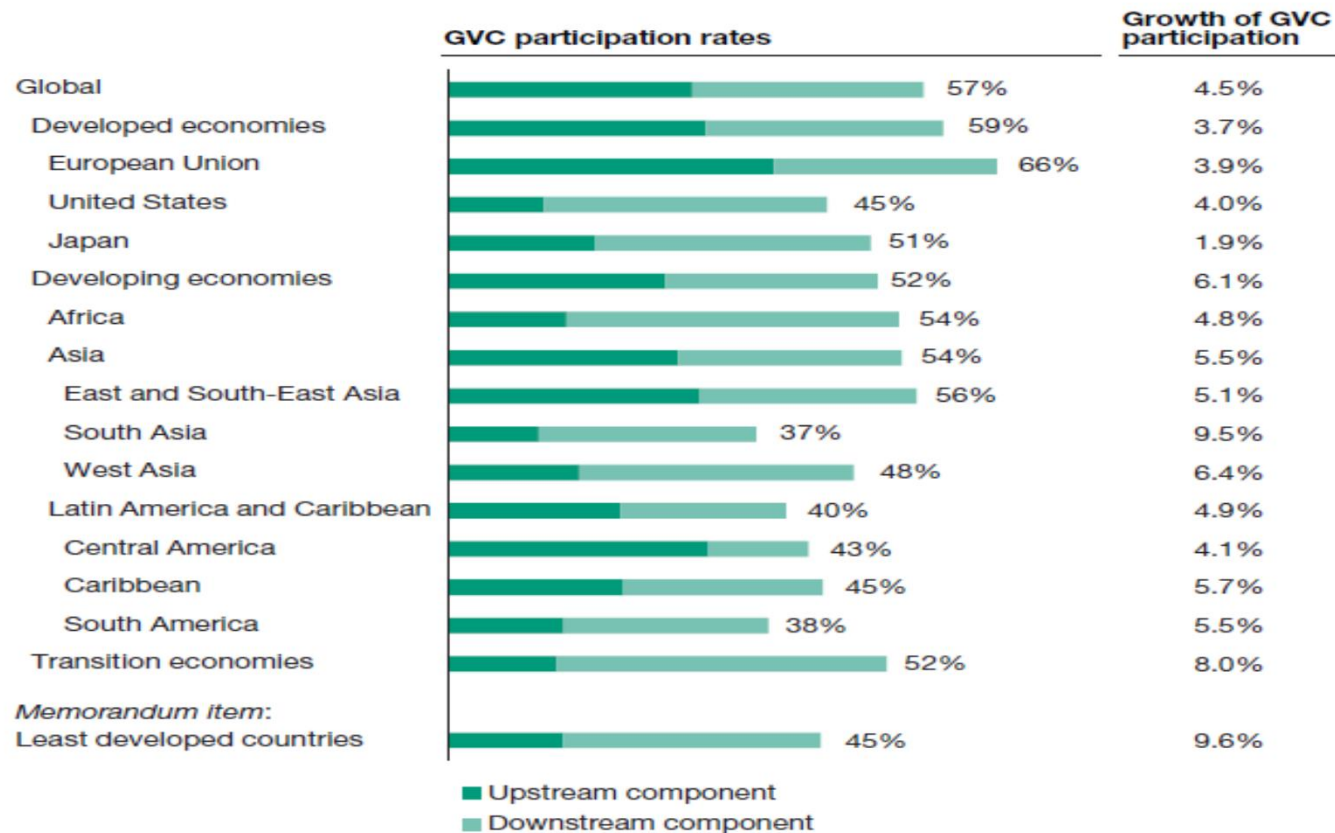
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Figure 9.5 How Firms Respond to the Economic Crisis



Source: Andrews 2008.

Figure IV.8. GVC participation, 2010, and GVC participation growth rates, 2005–2010

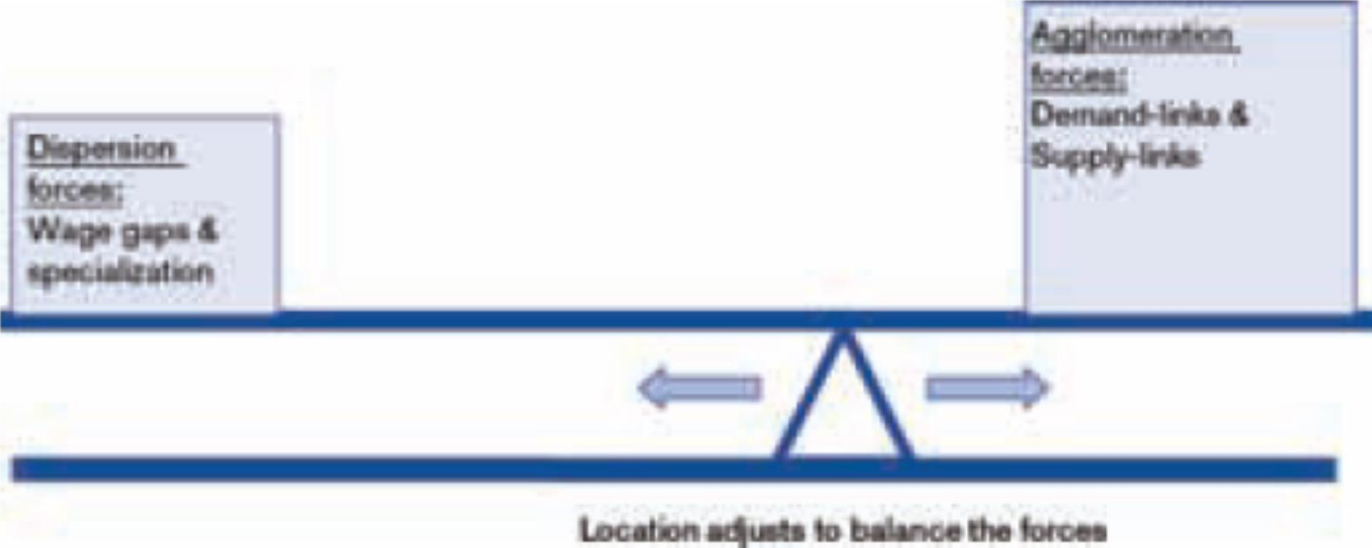


Source: UNCTAD-Eora GVC Database.

Note: GVC participation indicates the share of a country's exports that is part of a multi-stage trade process; it is the foreign value added used in a country's exports (upstream perspective) plus the value added supplied to other countries' exports (downstream perspective), divided by total exports. GVC participation growth here is the annual growth of the sum of the upstream and downstream component values (CAGR).

GESTÃO DAS CADEIAS DE ABASTECIMENTO GLOBAIS

FIGURE 1.14: Equilibrium location balances agglomeration and dispersion forces



Processos de Aprendizagem

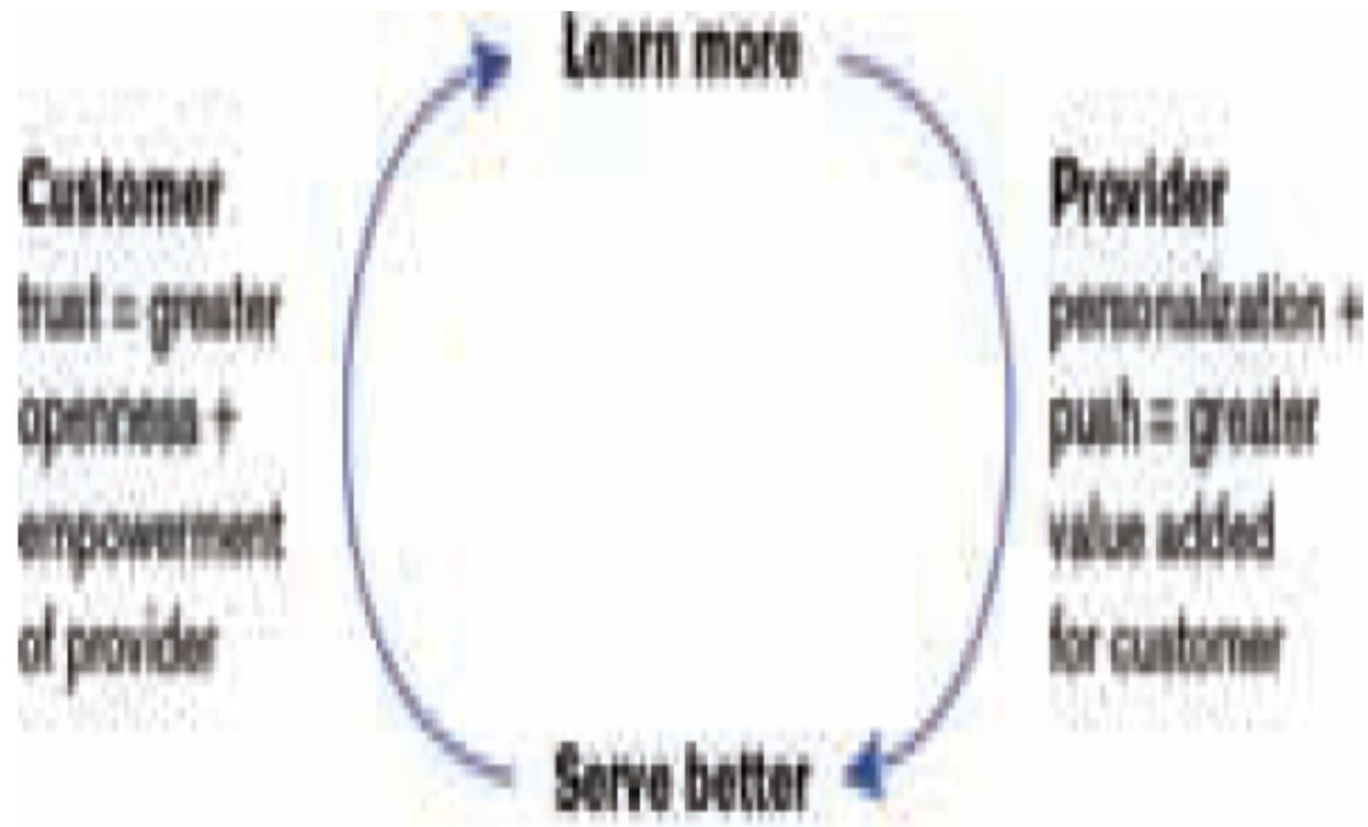
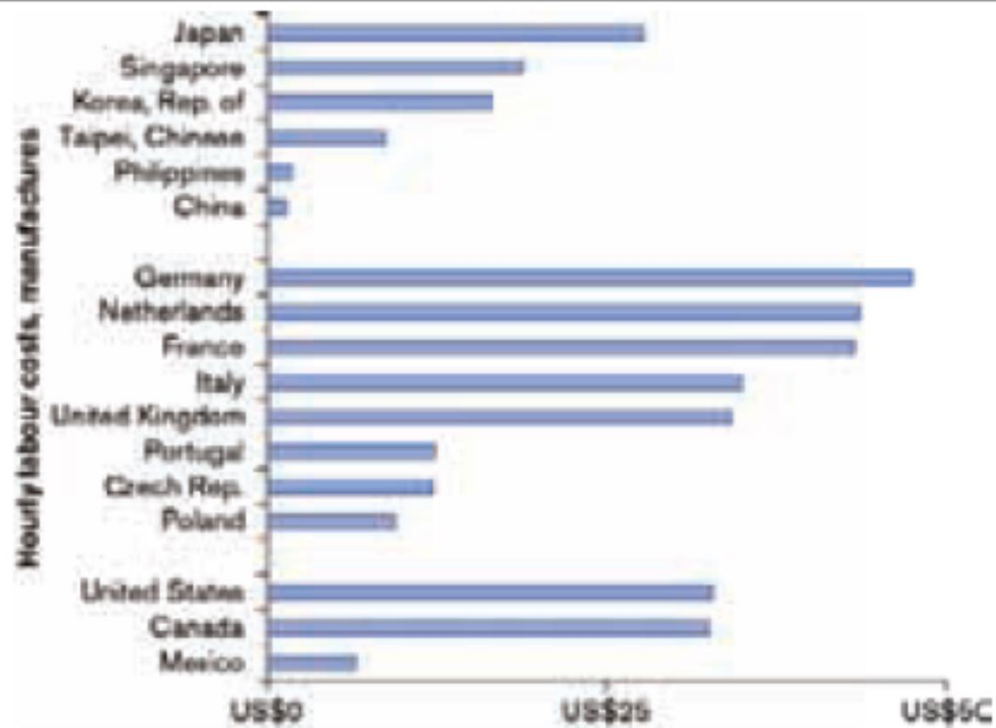
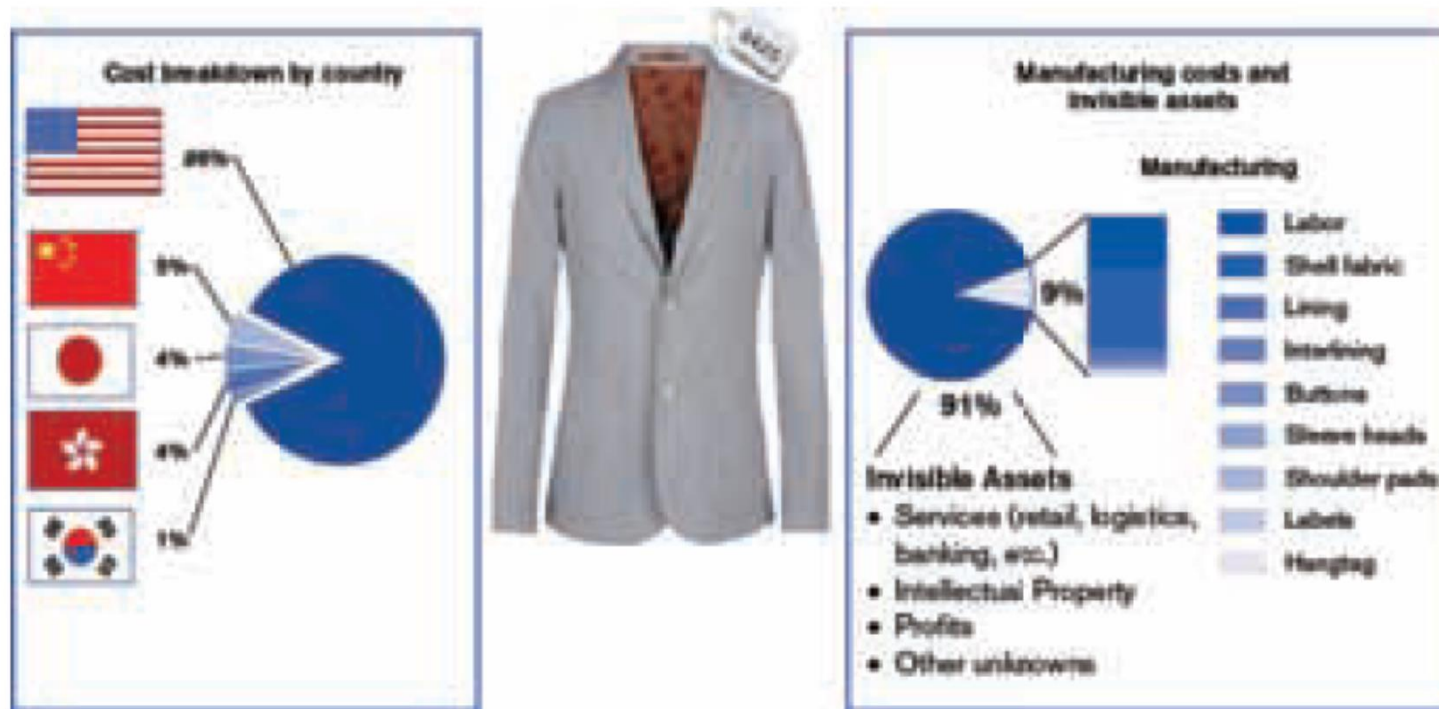


FIGURE 1.11: Wage differences in Factory Asia, Factory North America and Factory Europe, 2008



Source: US Bureau of Labor Statistics, International Labor Comparisons.

FIGURE 2.2: A suit made in China and sold in the United States



Source: Fung Global Institute Li & Fung case study.

Fonte: Low (2013)

Aprendizagem e Eficiência em CAG

As an example, YCH Group produces computer kits for assembly into Dell Computers. Approximately 50 different suppliers produce the components that all need to be put together for the production line. When they began this task, it took the company eight hours to pull the stock and put the kits together. However, the time soon fell to four hours. Now, when an order is received, YCH can deliver the kit components to the line for assembly by Dell in just 45 minutes.

O Factor Tempo e a Dinâmica da Moda

For some companies, such as Zara, nearly all shipments are via air. This includes sourcing some products from Asia, shipping via air back to Spain, then returning finished goods via air back to Asia for consumers. Despite expensive shipping costs, Zara remains one of the most profitable clothing retailers in the world. Why do they use air freight every day? Because their business model is all about limited fashion. The time of conceptualization to appearance in the retail store is about six weeks and such a compressed schedule requires products to move via air. For this company though, their obsolescence is nearly zero given their quick response and the fact that they carry almost no inventory costs at all.

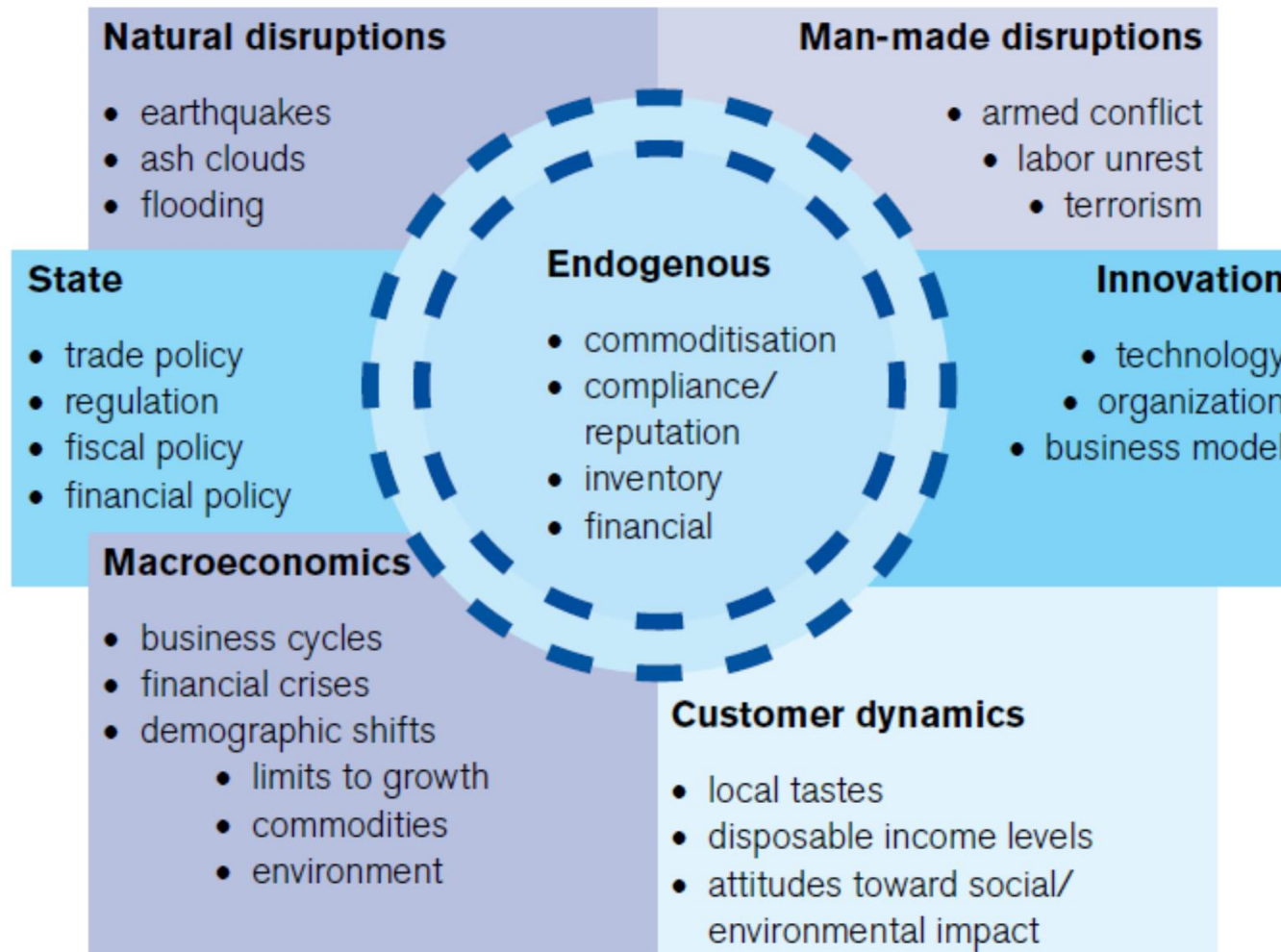
O CASO CLARK'S

- Nasceu como empresa industrial no Reino Unido
- Investimento Directo em vários países para redução de custos de produção
- Expansão rede de distribuição internacional
- Mais de 3500 trabalhadores em Portugal
- Decisão de pôr em concorrência filiais e fornecedores independentes
- Encerramento em cerca de 5 anos de quase todas as filiais produtivas no Mundo

RISCOS E CUSTOS DAS
CADEIAS DE
ABASTECIMENTO GLOBAIS

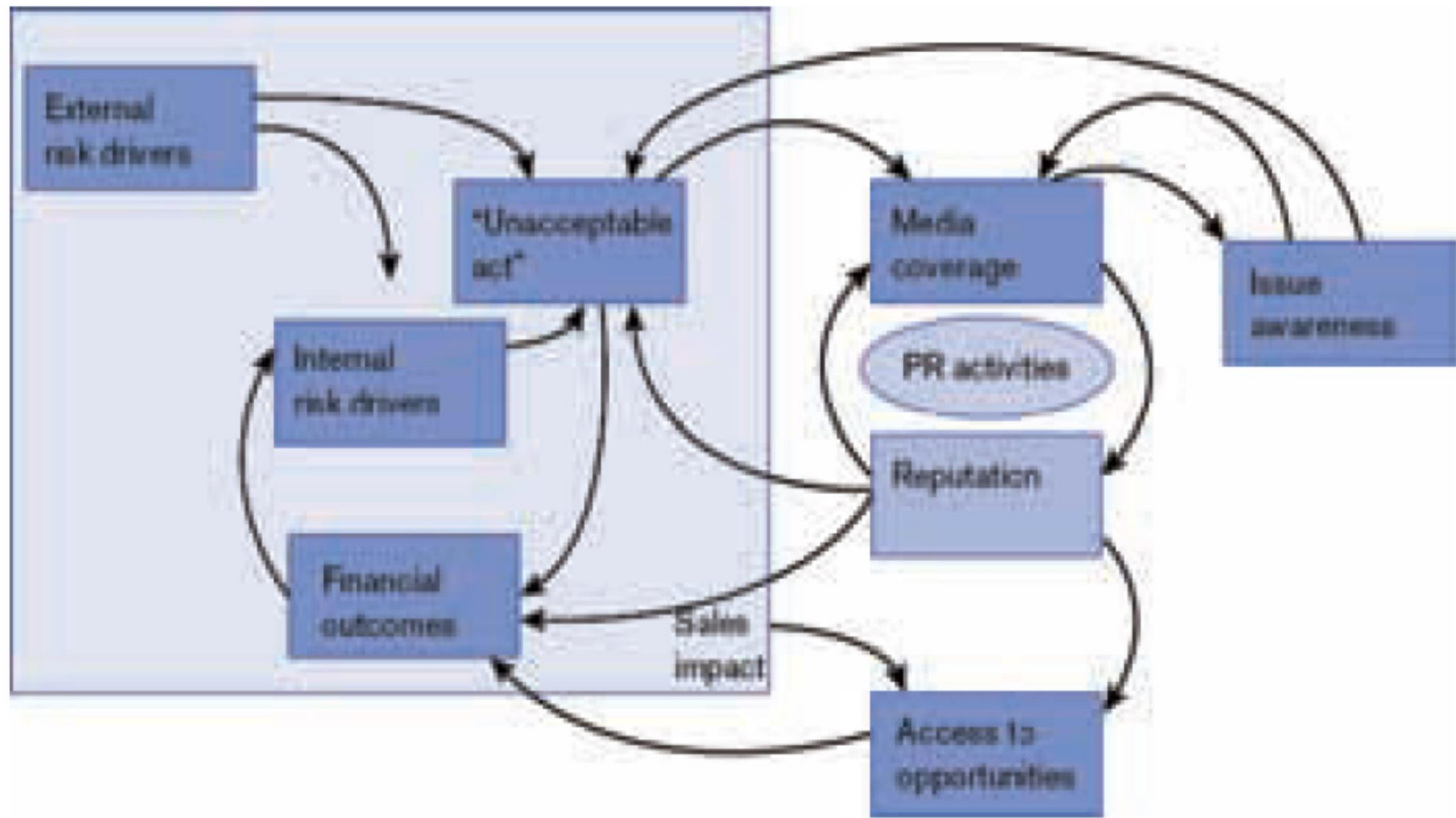
PRINCIPAIS CUSTOS E RISCOS

- Custos adicionais
- Cumprimento condições de entrega (qualidade, tempos...)
- Identificação de parceiros de confiança
- Conjugação de contribuições
- Criação de concorrentes



Source: FGI Supply Chain Study.

Fonte: Lessard (2013)



Fonte: Lessard (2013)

IMPLICAÇÕES PARA O DESENVOLVIMENTO

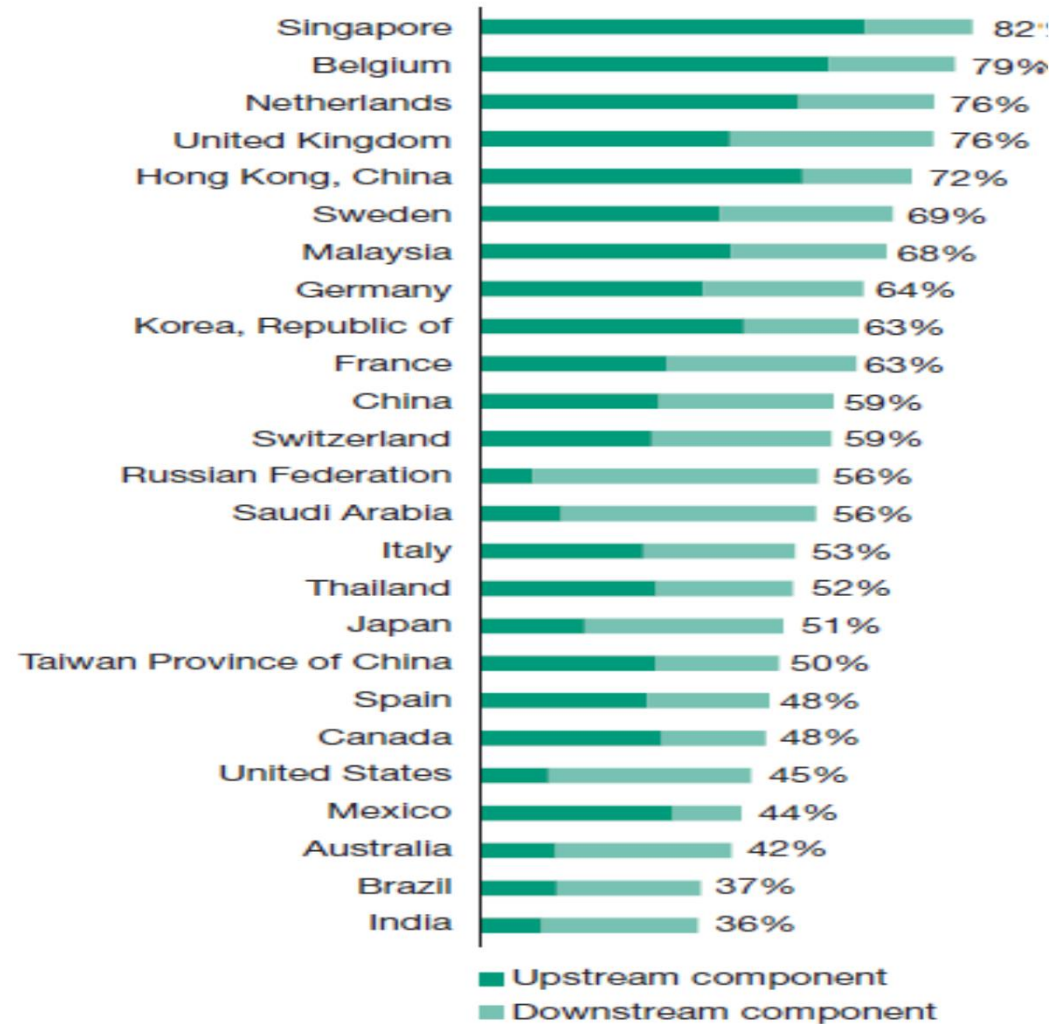
CADEIAS DE VALOR GLOBAIS

Table IV.1. Perspectives on GVCs

	International Business “Firm perspective”	Economics “Country perspective”
Defining concepts	<ul style="list-style-type: none"> GVCs are defined by <i>fragmented</i> supply chains, with internationally dispersed tasks and activities <i>coordinated</i> by a lead firm (a TNC). 	<ul style="list-style-type: none"> GVCs explain how exports may incorporate imported inputs; i.e. how exports include foreign and domestically produced <i>value added</i>.
Scope	<ul style="list-style-type: none"> GVCs are present predominantly in industries characterized by such supply chains, with typical examples including electronics, automotive and textiles (although the scope is widening to agriculture and food and offshore services, among others). 	<ul style="list-style-type: none"> GVCs and value added trade, by design and by the necessities of statistical calculation, encompass <i>all trade</i>; i.e. all exports and imports are part of a value chain.
Role of investment and trade	<ul style="list-style-type: none"> Investment and trade are complementary but alternative modes of international operation for firms; i.e. a firm can access foreign markets or resources by establishing an affiliate or through trade. 	<ul style="list-style-type: none"> Investment is needed to build export capacity (i.e., it creates the factors of production required to generate value added exports); both investment and value added in exports are GDP contributors.

Source: UNCTAD.

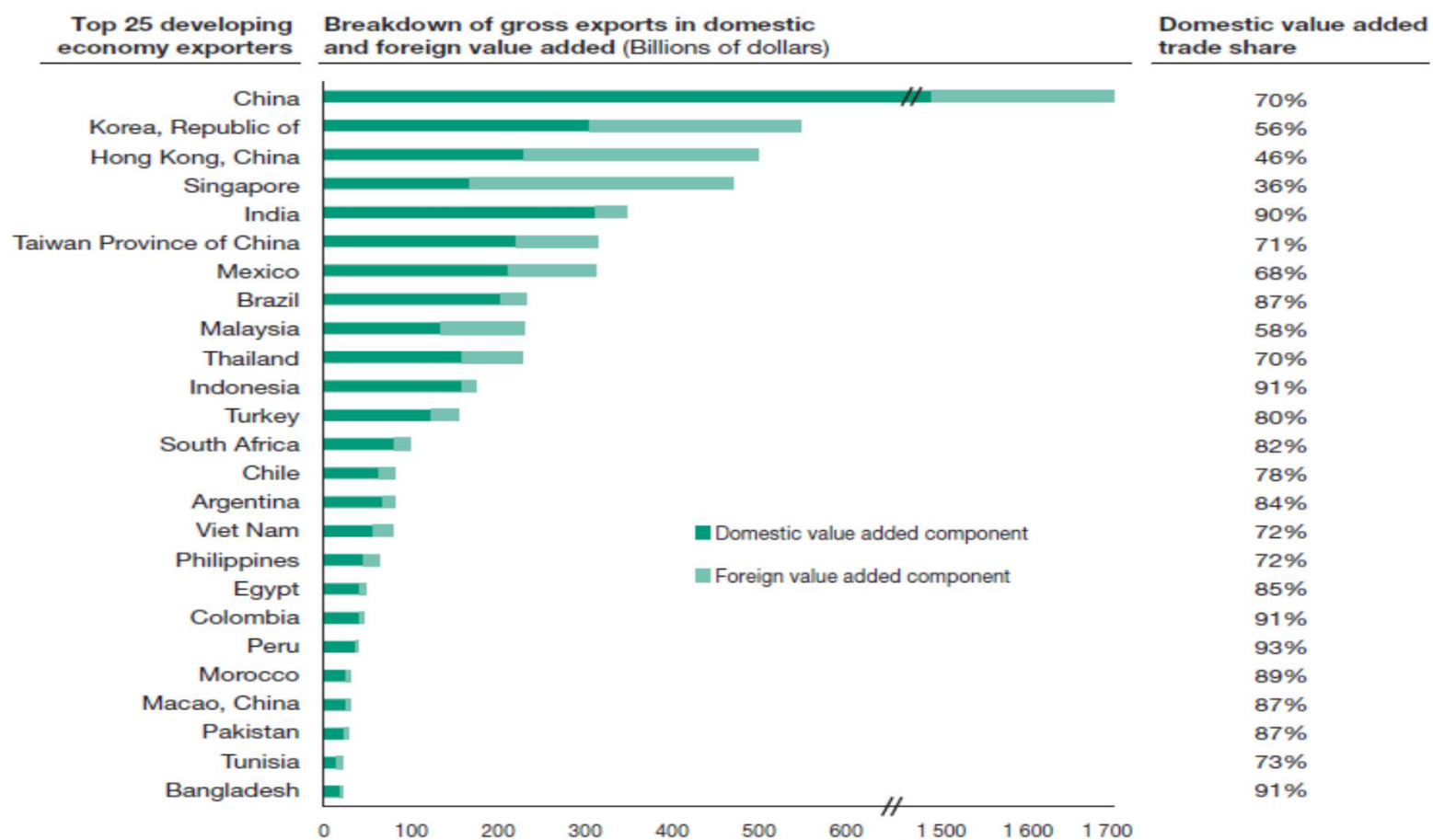
Figure IV.9. GVC participation rate of the top 25 exporting economies, 2010



Source: UNCTAD-Eora GVC Database.

Singapore is trying to create something new in a “supply chain city.” This is a dedicated, highly automated facility designed by YCH Group for up to 10,000 supply chain experts, professionals and practitioners. It has been designed from the beginning to allow for very flexible operations. For example, it allows firms to manufacture on the spot, change designs, test products, and prepare to scale up if things go well. It also includes a huge automated storage and retrieval system for inventory. The facility encourages the clustering of suppliers in one place. Singapore's Economic Development Board has strongly backed the project.

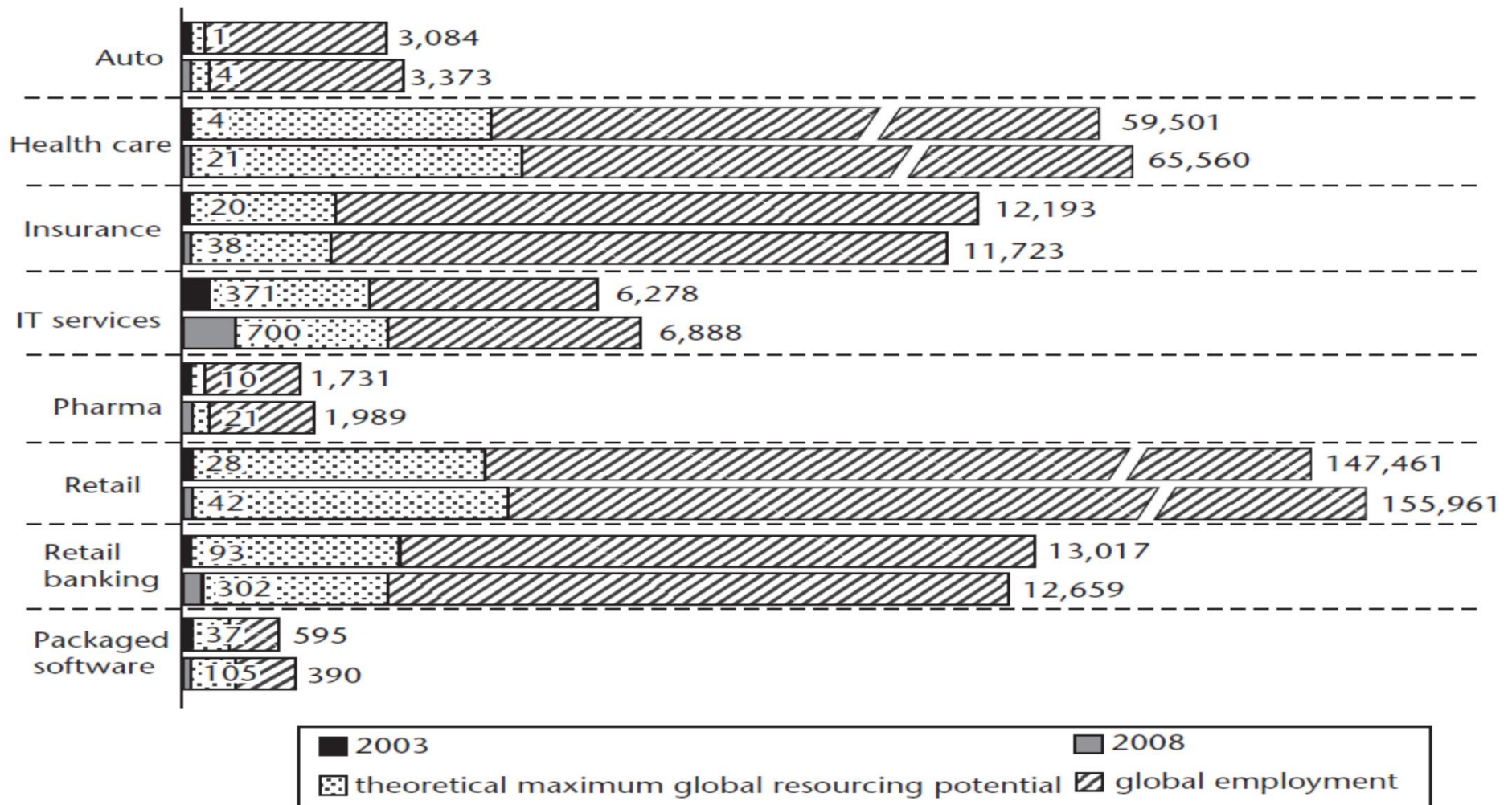
Figure IV.12. Domestic value added trade shares of the top 25 developing economy exporters, 2010



Source: UNCTAD-Eora GVC Database.

Note: Top 25 excludes predominantly oil-exporting countries.

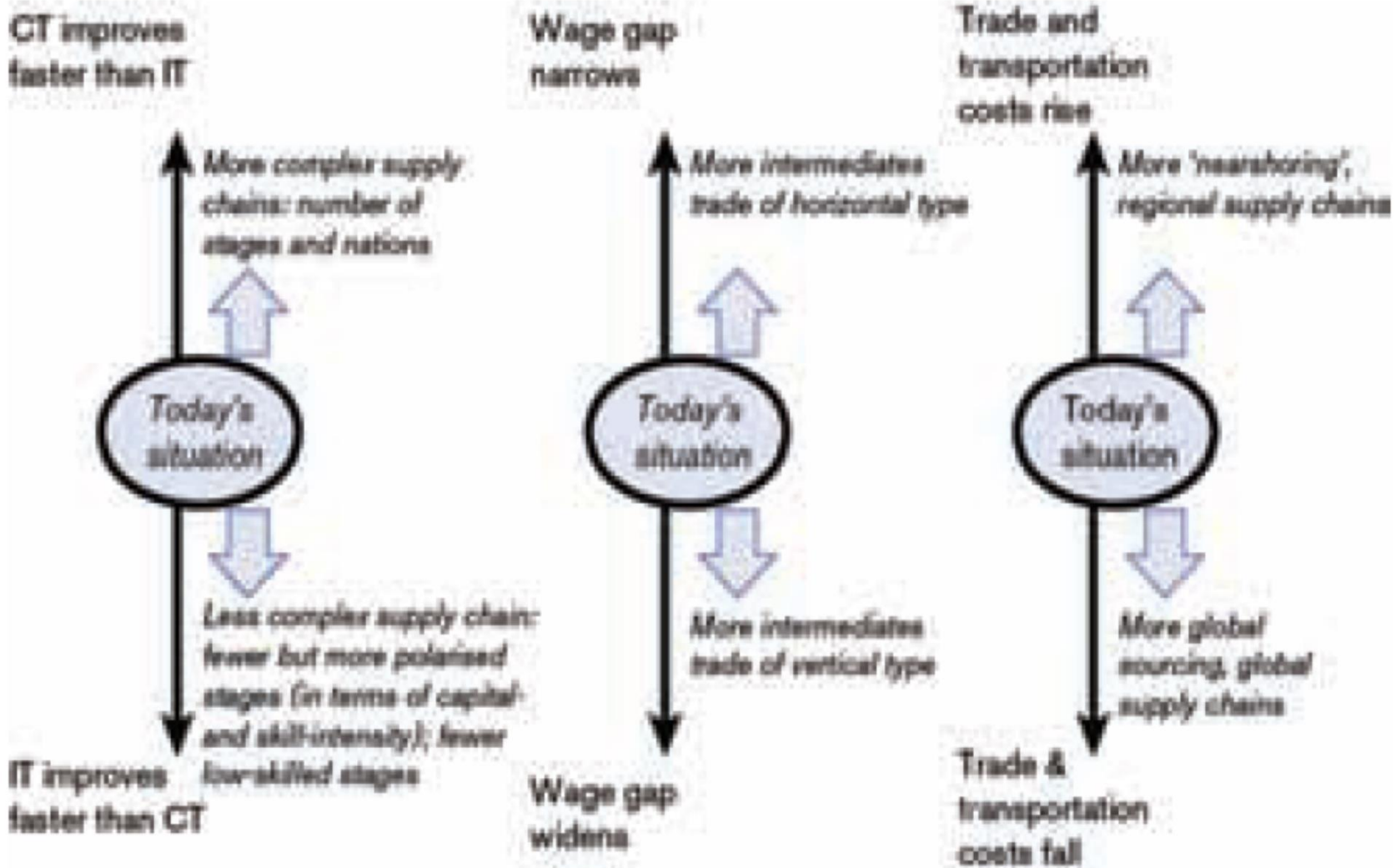
Figure 9.4 Actual and Potential Adoption of Offshore Practices



Source: McKinsey Global Institute 2009.

Note: Adoption of offshoring assesses the current and projected levels of offshoring to low-wage countries within a sector. Theoretical maximum global resourcing potential describes the percentage of a sector or function that may be performed remotely. Global employment is measured in thousands of jobs.

FIGURE 1.18: Future of international supply chains



Fonte: Baldwin (2013)

COMO AVALIAR A CONTRIBUIÇÃO DAS
CADEIAS DE ABASTECIMENTO GLOBAIS
PARA O DESENVOLVIMENTO?

QUE FACTORES?