



CENÁRIO ECONÔMICO

BRASIL E RIO GRANDE DO SUL

B A T E L E U R .

INDÚSTRIA



COMÉRCIO

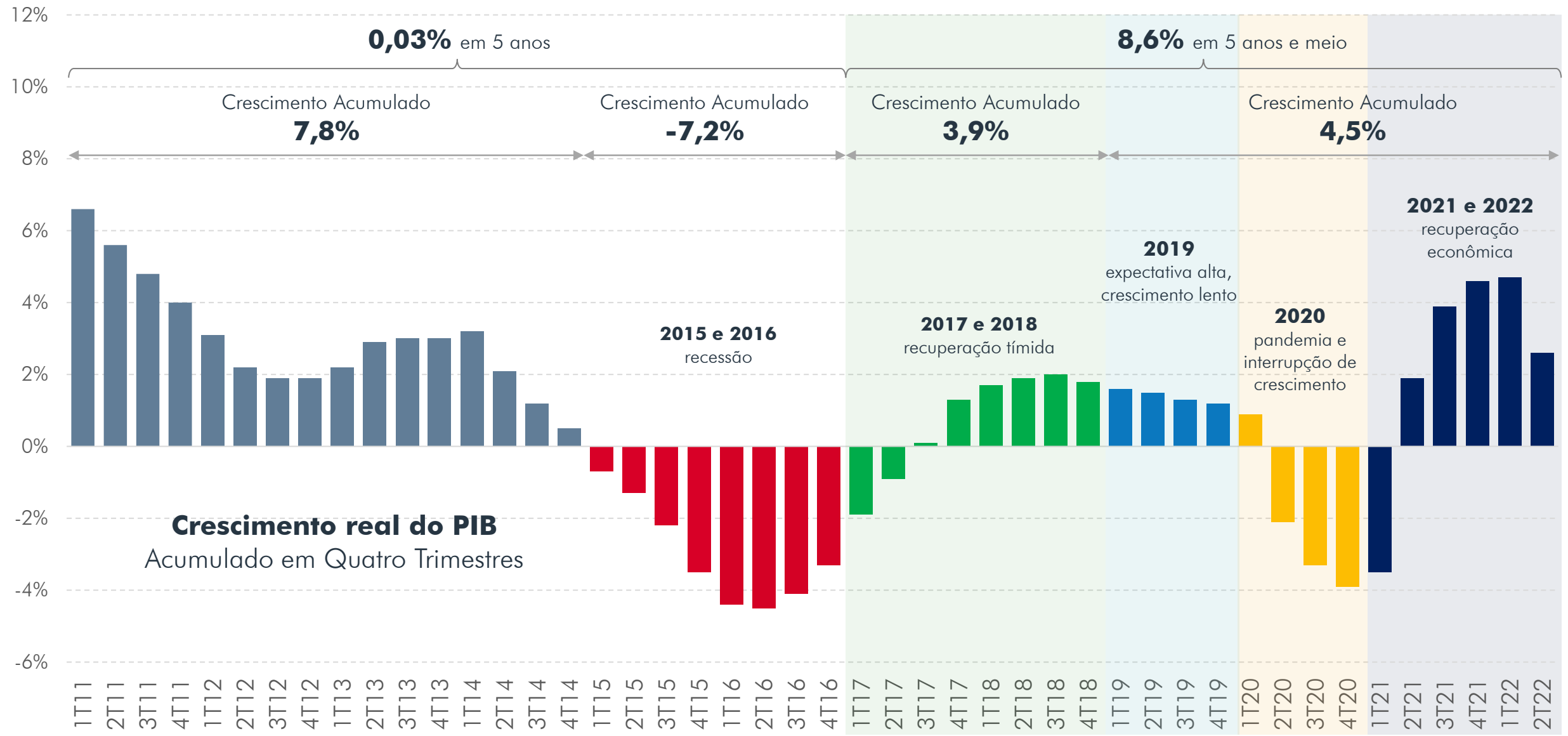


SERVIÇOS

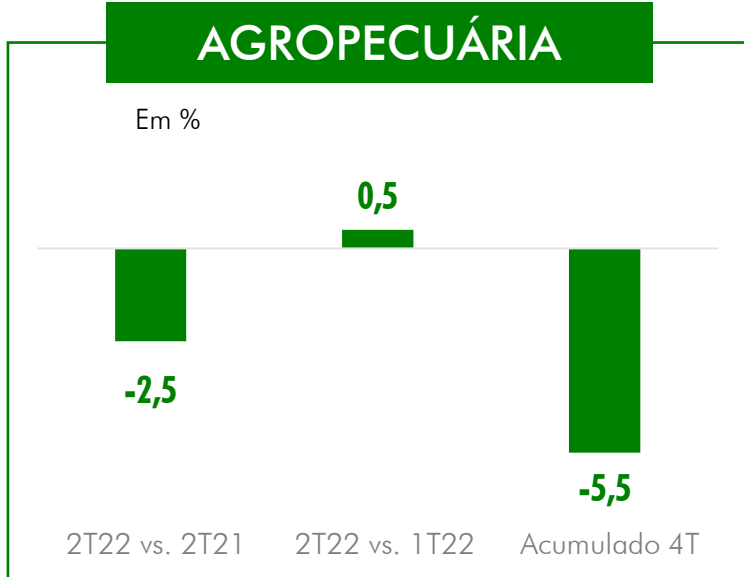
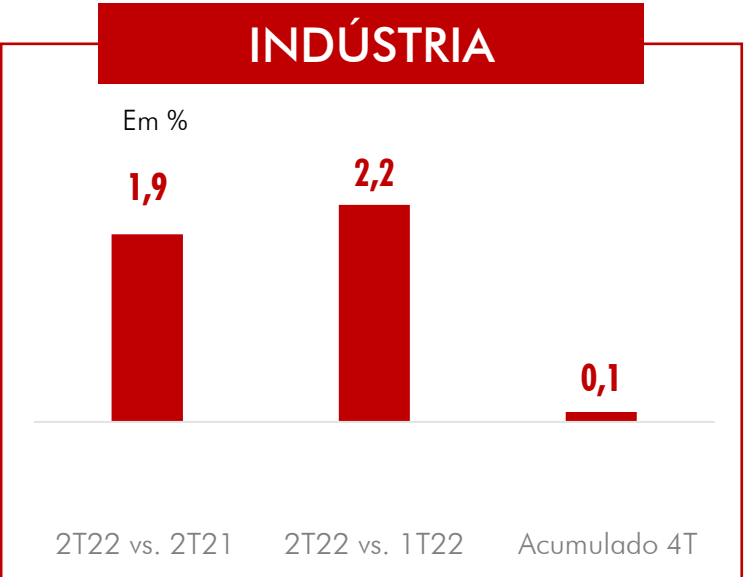
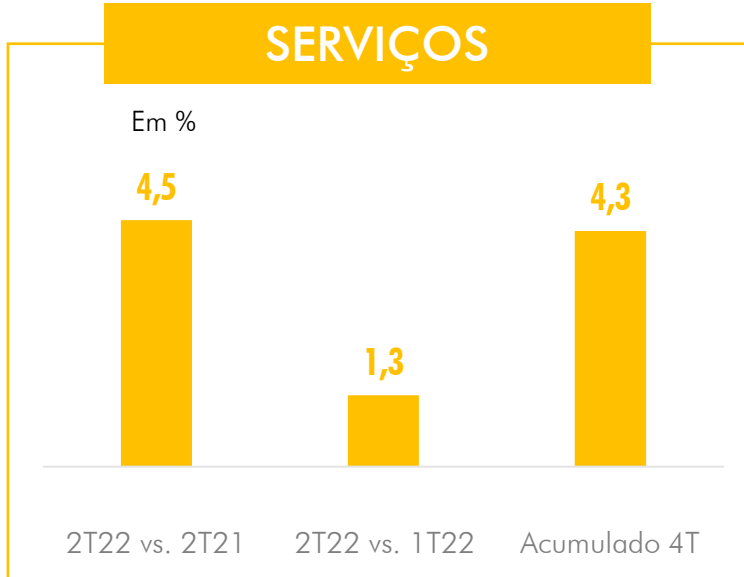
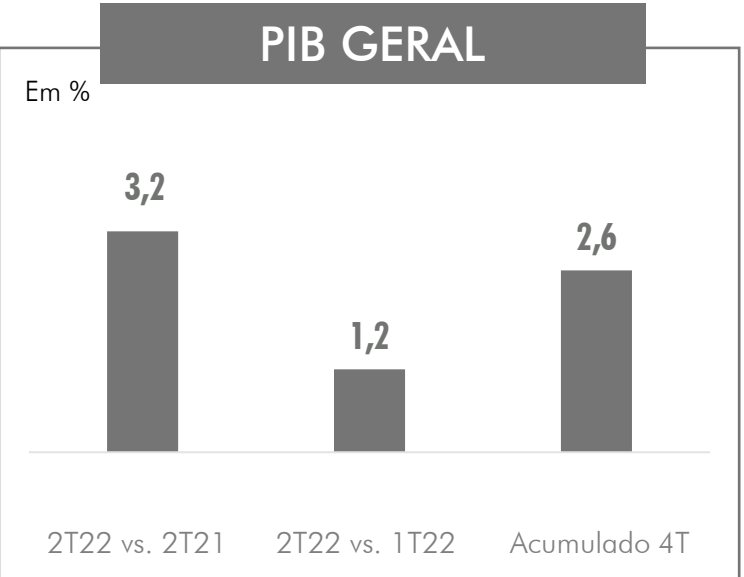


AGRONEGÓCIO





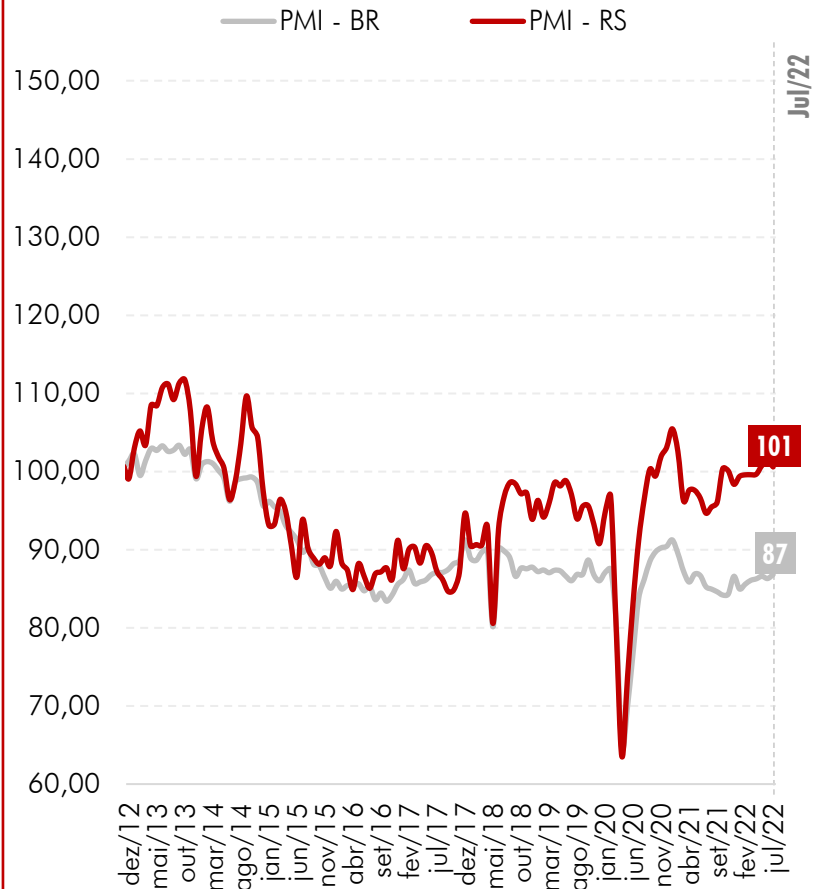
Fonte: IBGE



Fonte: IBGE e DEE/RS

INDÚSTRIA

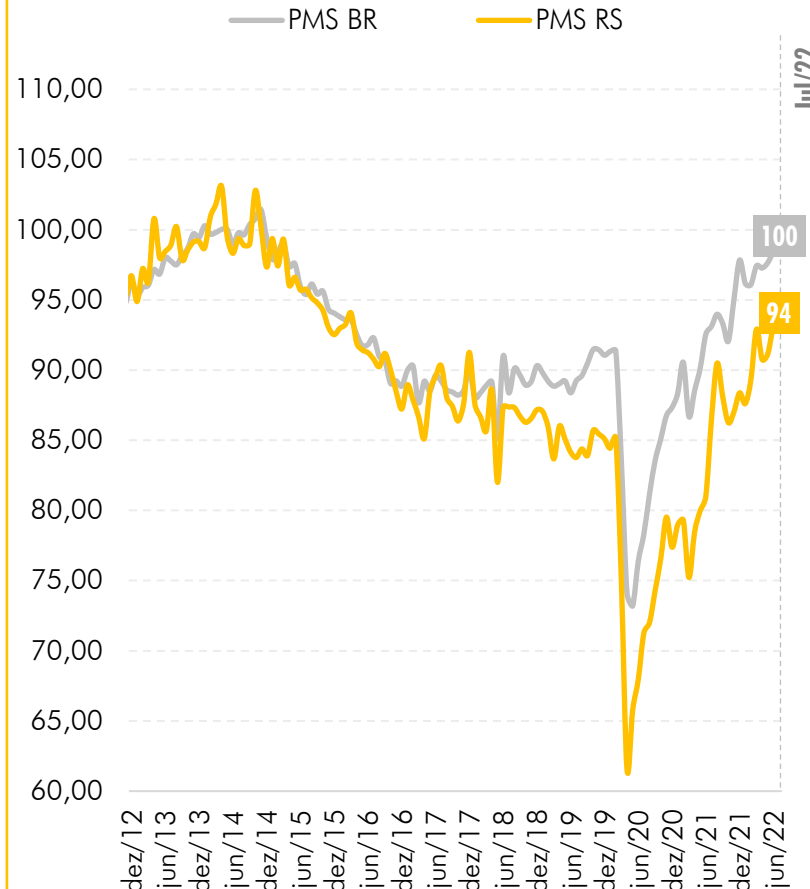
PMI - Índice de Produção Física Industrial, 2012 = 100



Fonte: IBGE
* Projeções

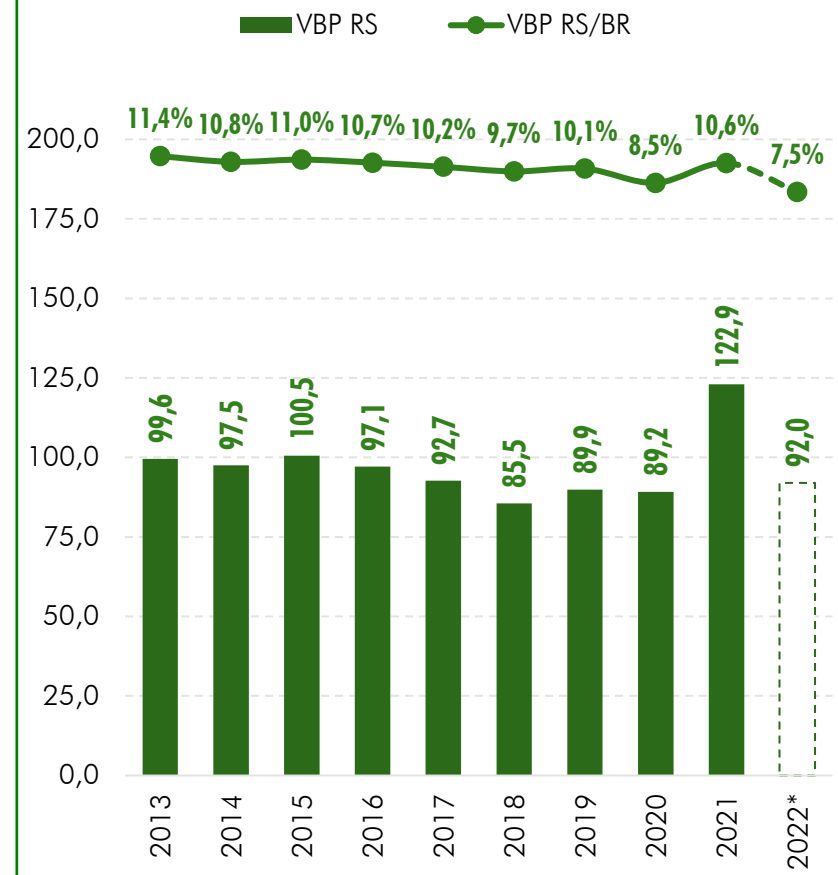
SERVIÇOS

PMS - Índice de Volume de Serviços, 2014 = 100



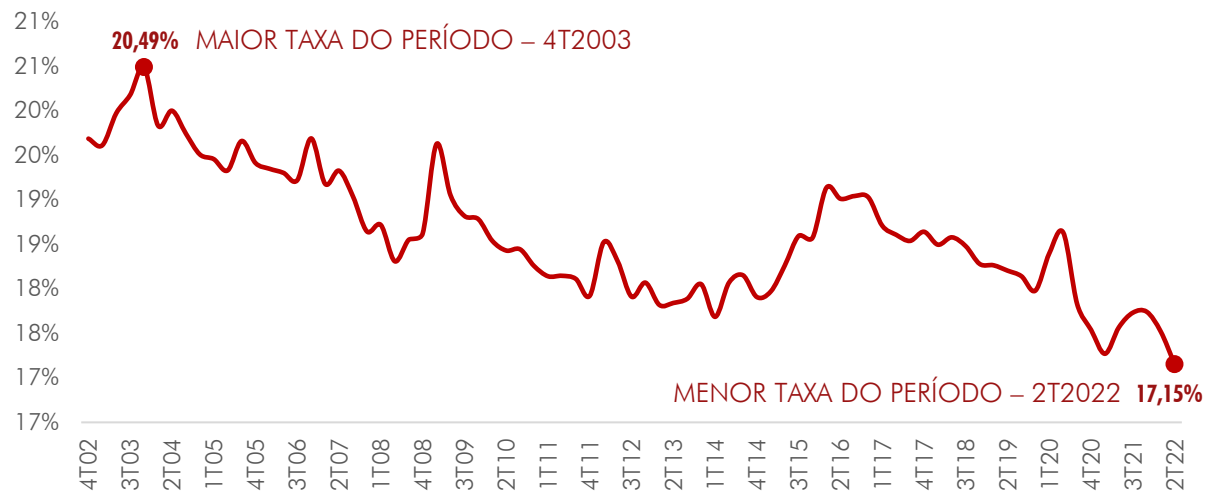
AGROPECUÁRIA

VBP - Valor Bruto da Produção (em bilhões de reais)



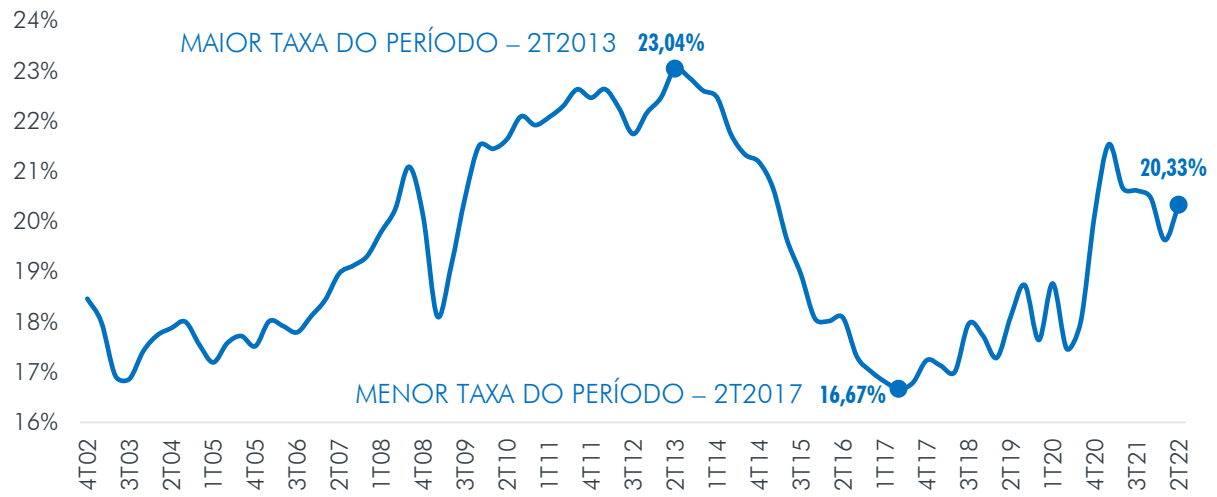
EVOLUÇÃO DO CONSUMO DO GOVERNO

Taxa nominal – % Consumo do governo / PIB



TAXA DE INVESTIMENTO

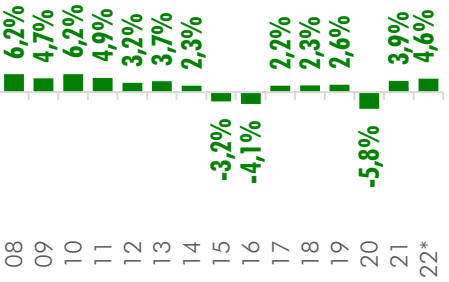
Taxa nominal – % FBCF / PIB



Var. % acumulada em 4 trimestres

Consumo das famílias (+)

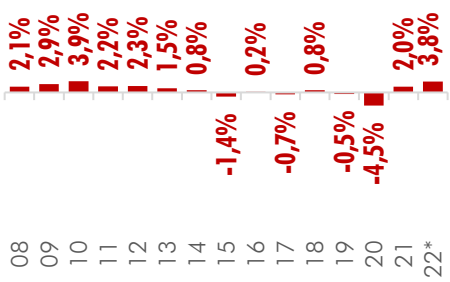
% PIB 2021: **61,0%**



Var. % acumulada em 4 trimestres

Consumo do governo (+)

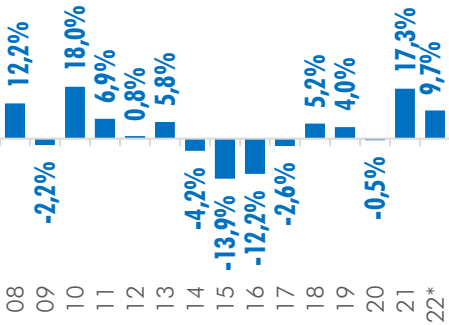
% PIB 2021: **19,1%**



Var. % acumulada em 4 trimestres

FBCF (+)

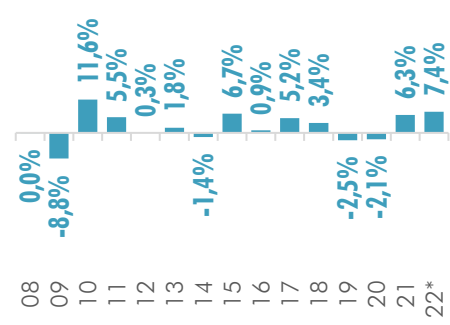
% PIB 2021: **19,0%**



Var. % acumulada em 4 trimestres

Exportações (+)

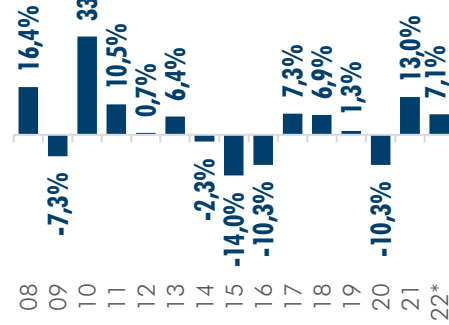
% PIB 2021: **20,1%**



Var. % acumulada em 4 trimestres

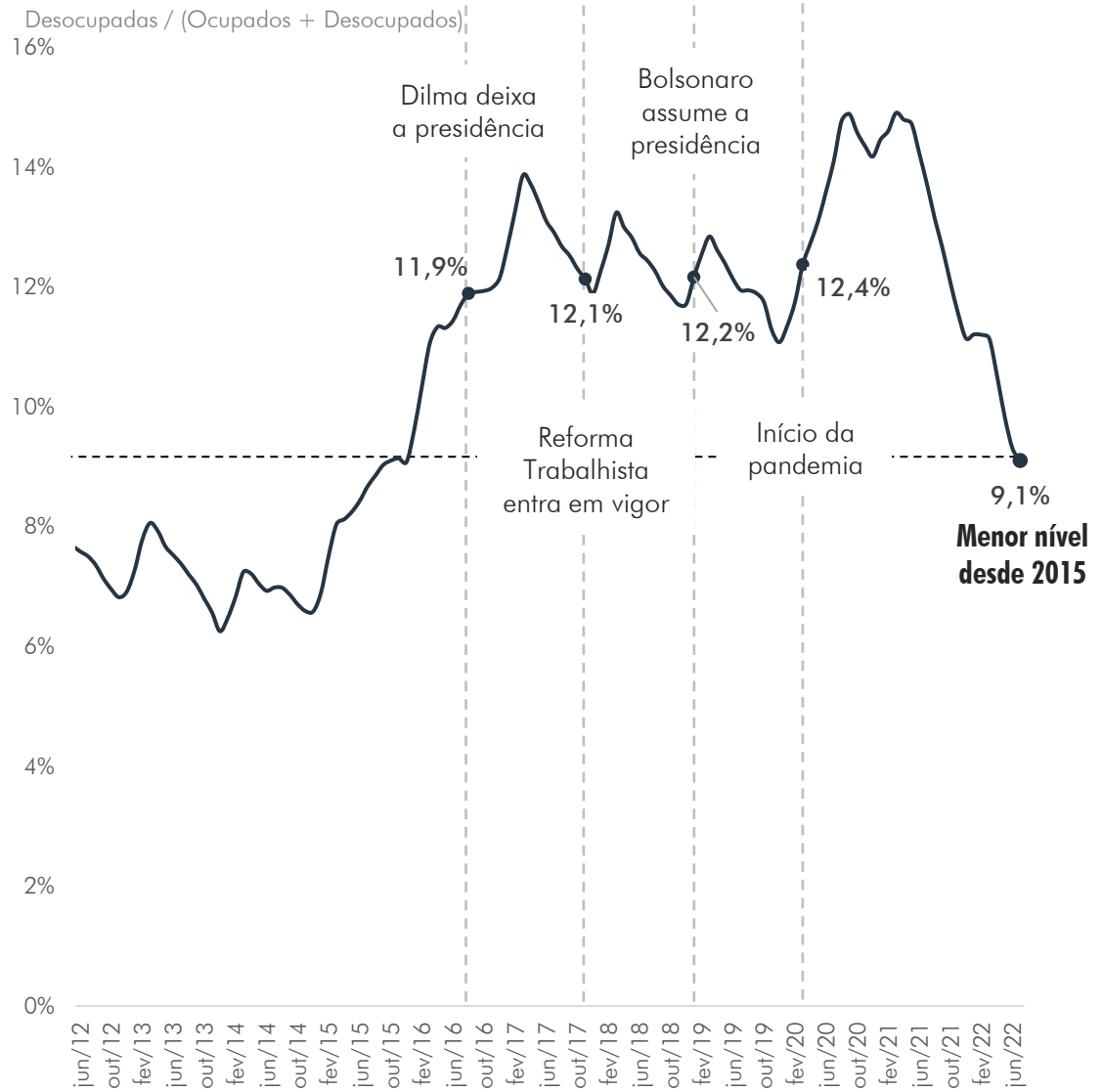
Importações (-)

% PIB 2021: **19,1%**

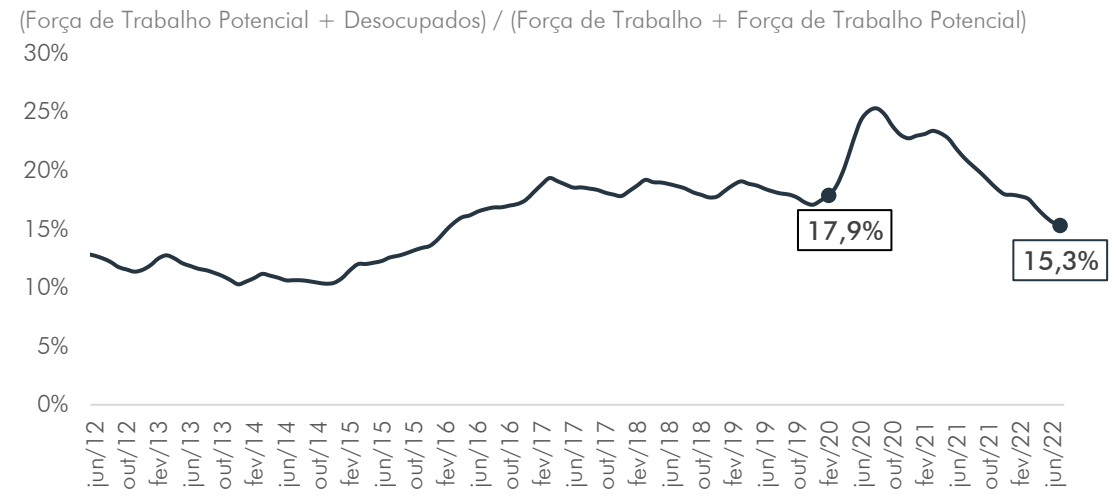


Fonte: IBGE
* 2T22

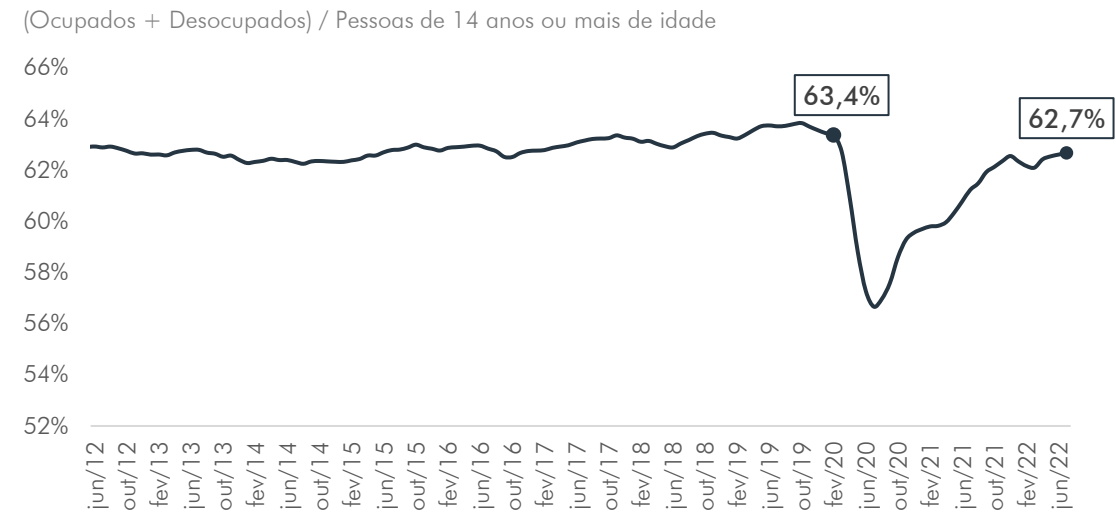
TAXA DE DESOCUPAÇÃO



TAXA COMBINADA DE DESOCUPAÇÃO E FORÇA POTENCIAL¹



TAXA DE PARTICIPAÇÃO NA FORÇA DE TRABALHO¹

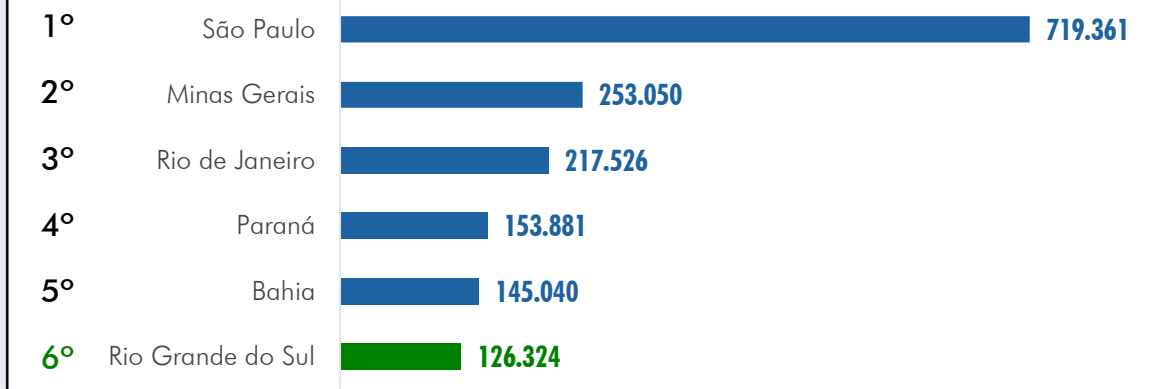
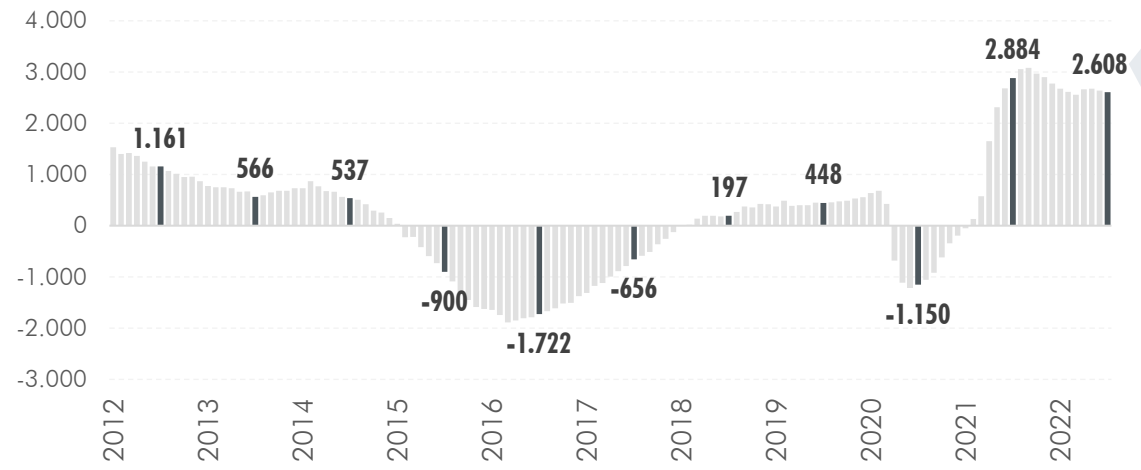


Fonte: IBGE, Pnad Contínua

¹ Força de Trabalho Potencial é definida como o conjunto de pessoas de 14 anos ou mais de idade que não estavam ocupadas nem desocupadas na semana de referência, mas que possuíam um potencial de se transformarem em força de trabalho.

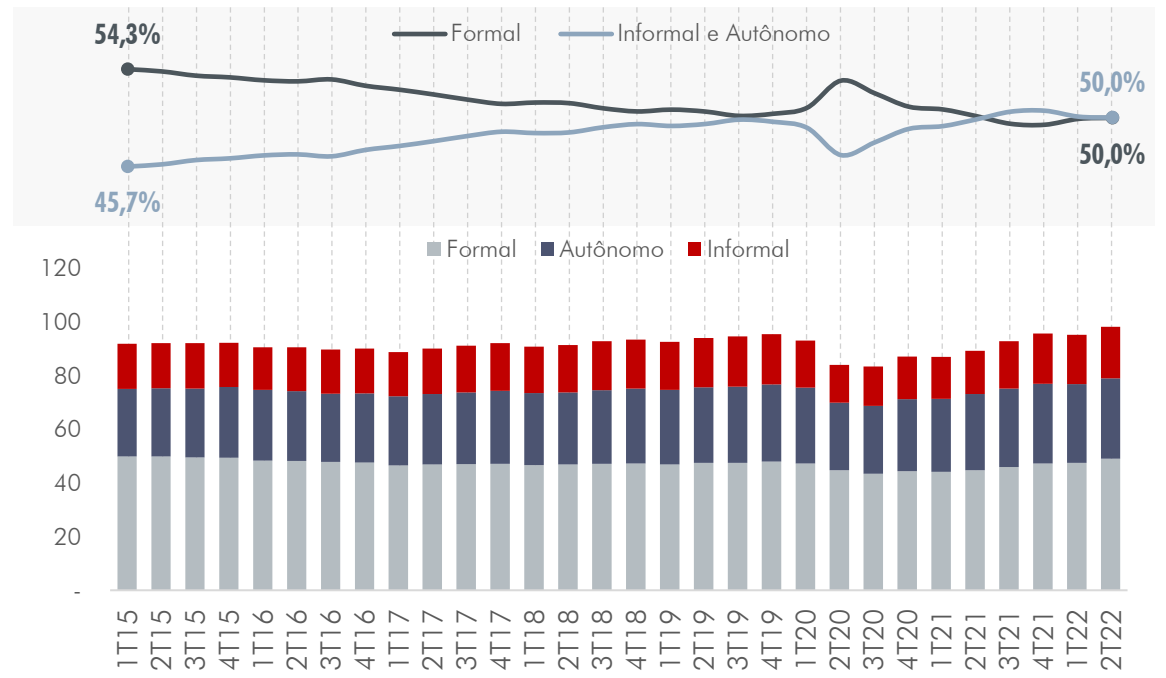
SALDO DE EMPREGOS FORMAIS ACUMULADOS

Acumulado em 12 meses – em milhares de habitantes



EVOLUÇÃO TRABALHO INFORMAL E AUTÔNOMO

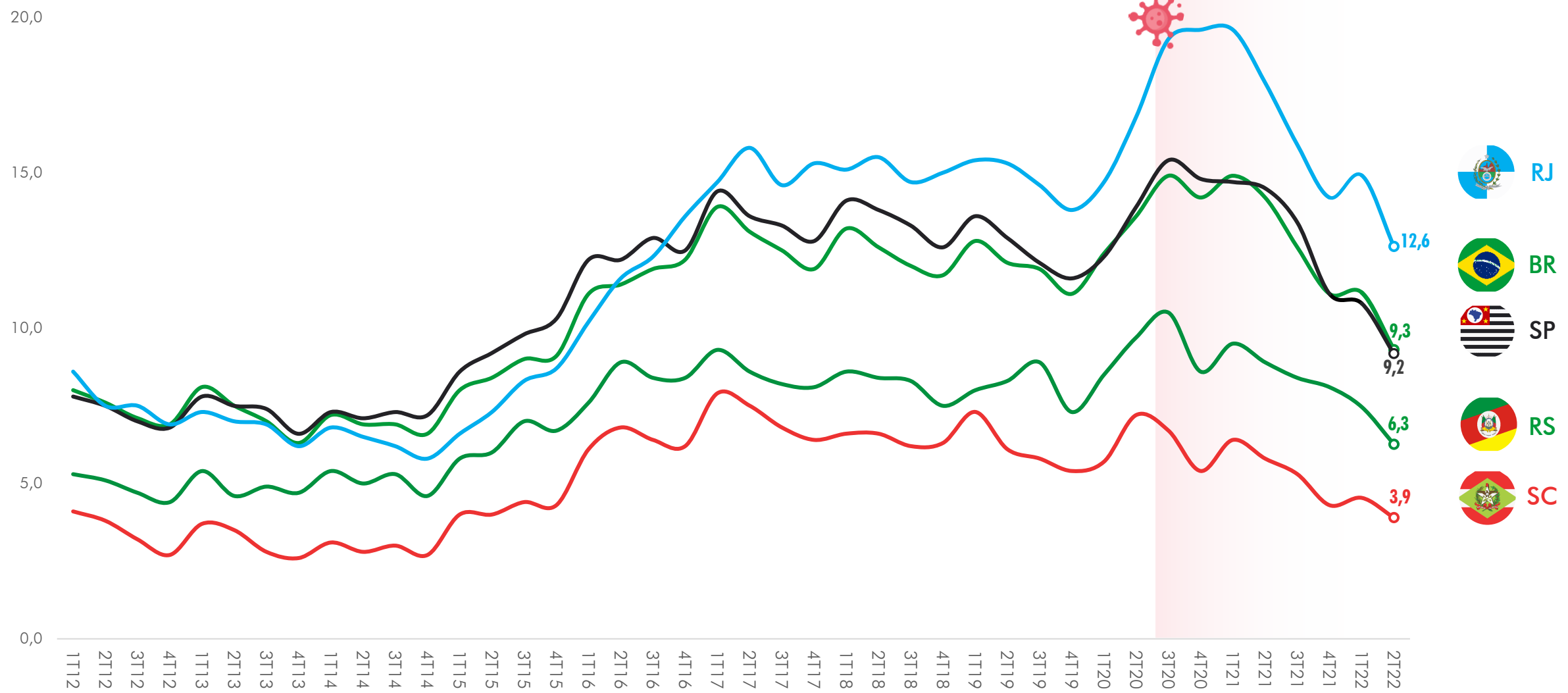
Em milhões de habitantes



Saldo de Empregos Formais 2022		Brasil		Rio Grande do Sul	
		1.560.896		81.991	
Serviços	+874,20 mil		+34,97 mil		
Indústria	+266,82 mil		+35,65 mil		
Construção	+216,59 mil		+7,37 mil		
Agropecuária	+102,06 mil		+0,55 mil		
Comércio	+101,23 mil		+3,45 mil		

TAXA DE DESOCUPAÇÃO TRIMESTRAL POR UF (VALORES EM %)

Desocupadas / (Ocupados + Desocupados)



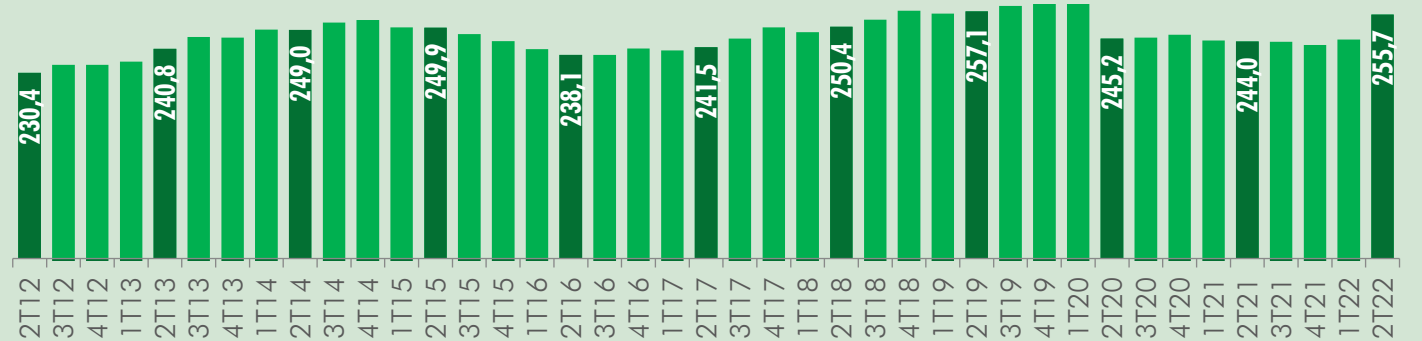
Fonte: IBGE, Pnad Contínua

EVOLUÇÃO TRIMESTRAL DA MASSA DE RENDIMENTO REAL

Em R\$ bilhões

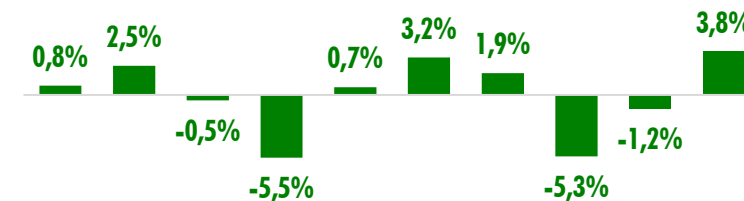


R\$ 1.187
2T22¹



RENDIMENTO REAL PER CAPITA

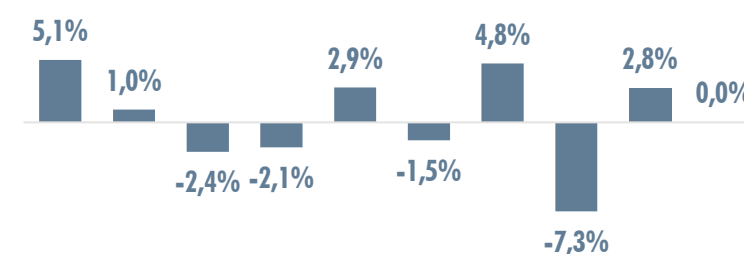
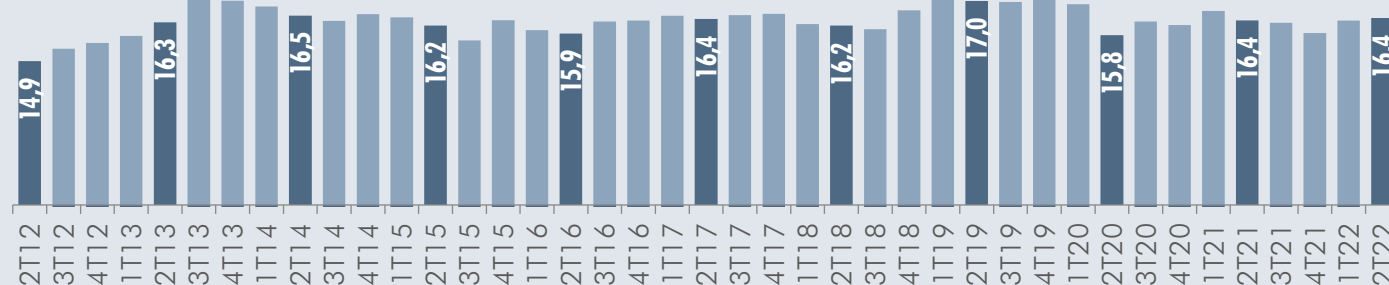
Var. % em relação ao mesmo período do ano anterior



2013 2014 2015 2016 2017 2018 2019 2020 2021 2022



R\$ 1.426
2T22¹

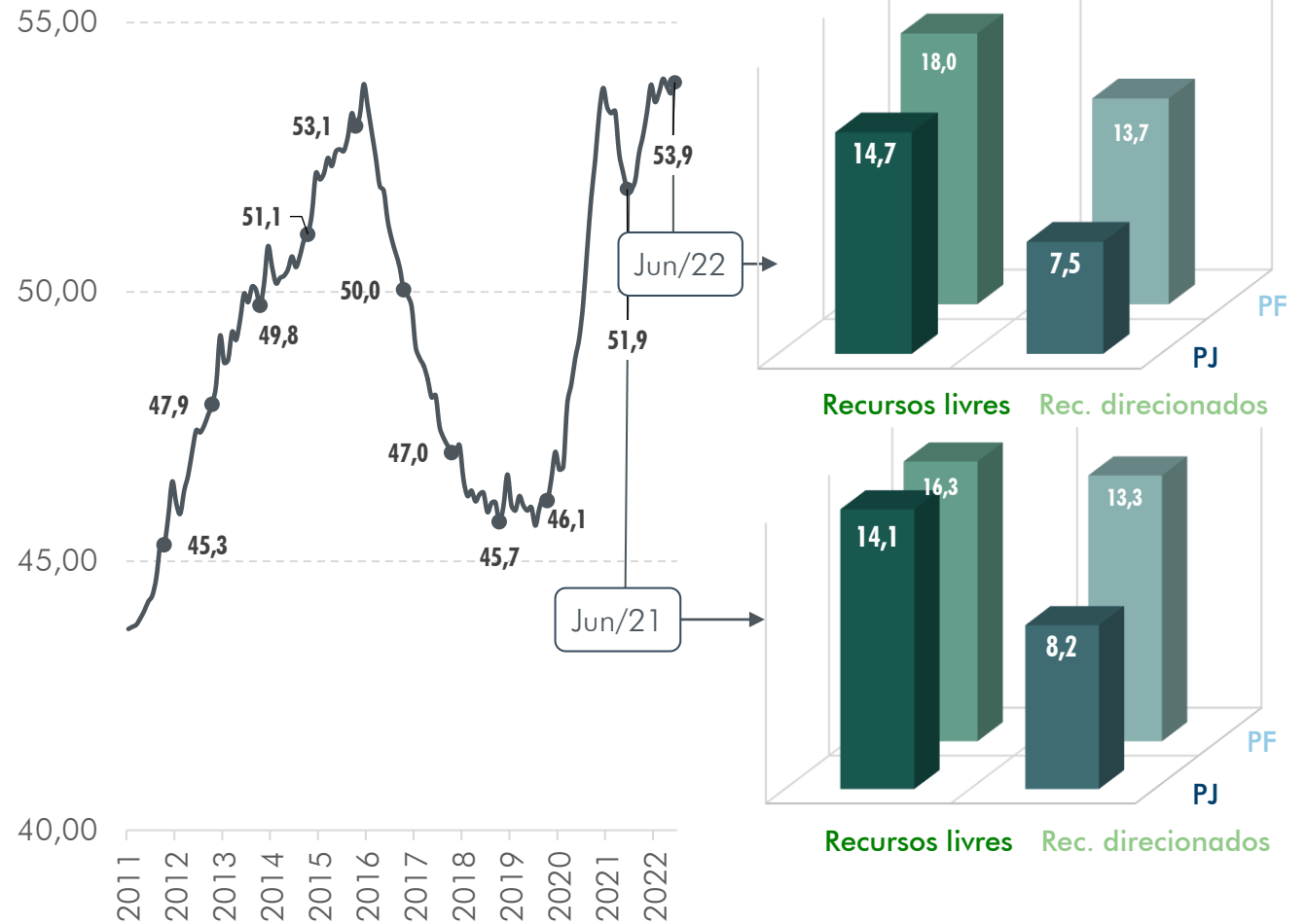


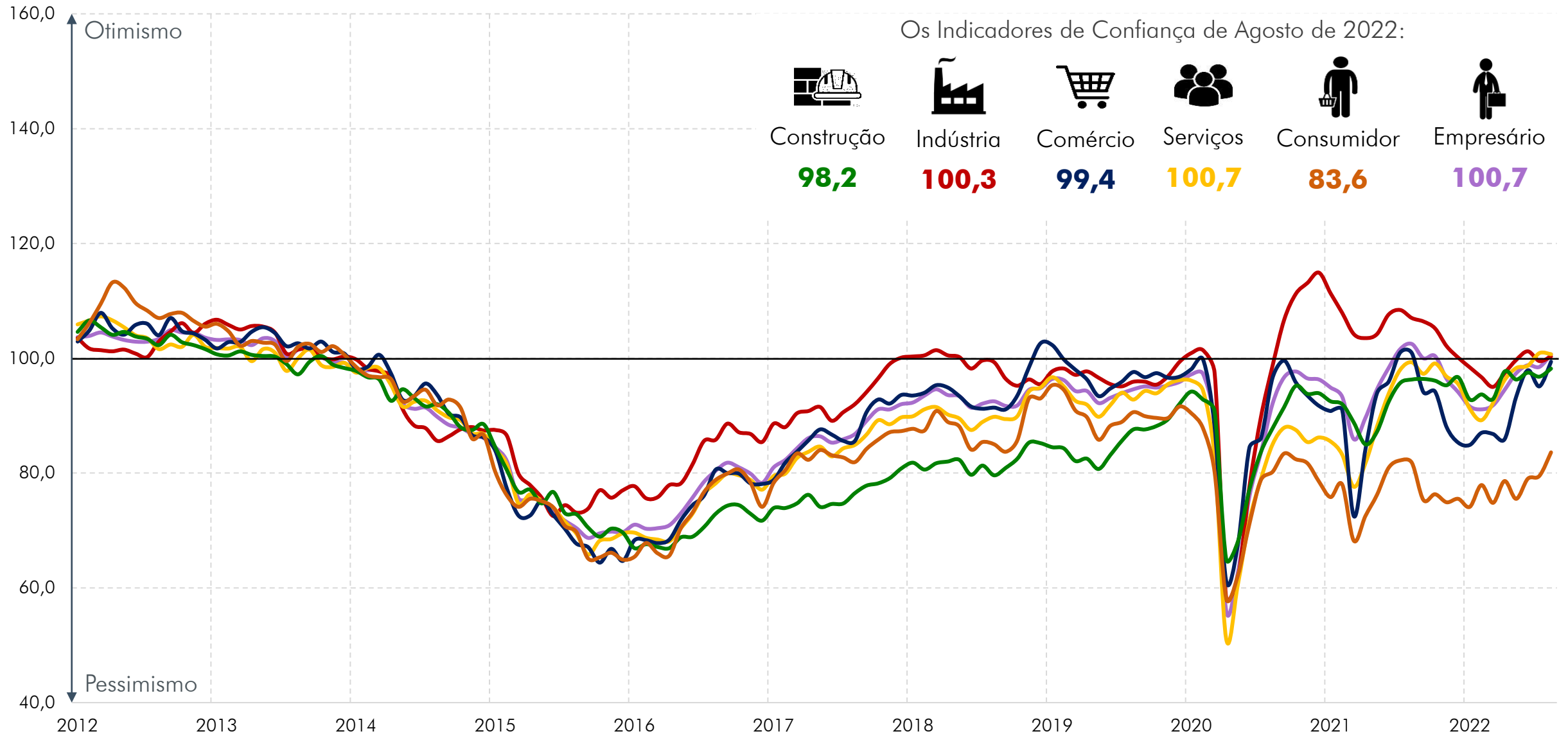
2013 2014 2015 2016 2017 2018 2019 2020 2021 2022

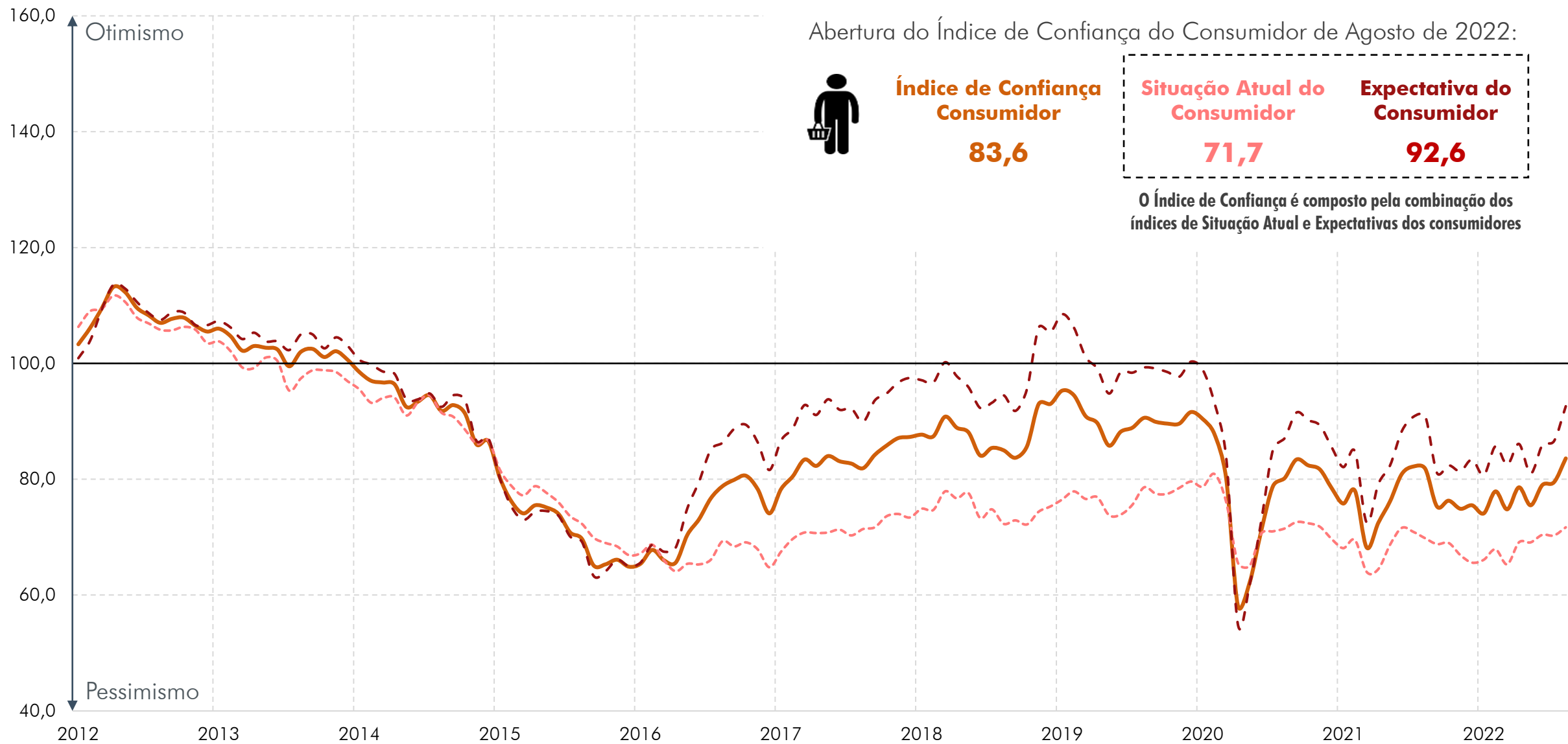
INADIMPLÊNCIA SOBRE A CARTEIRA DE CRÉDITO

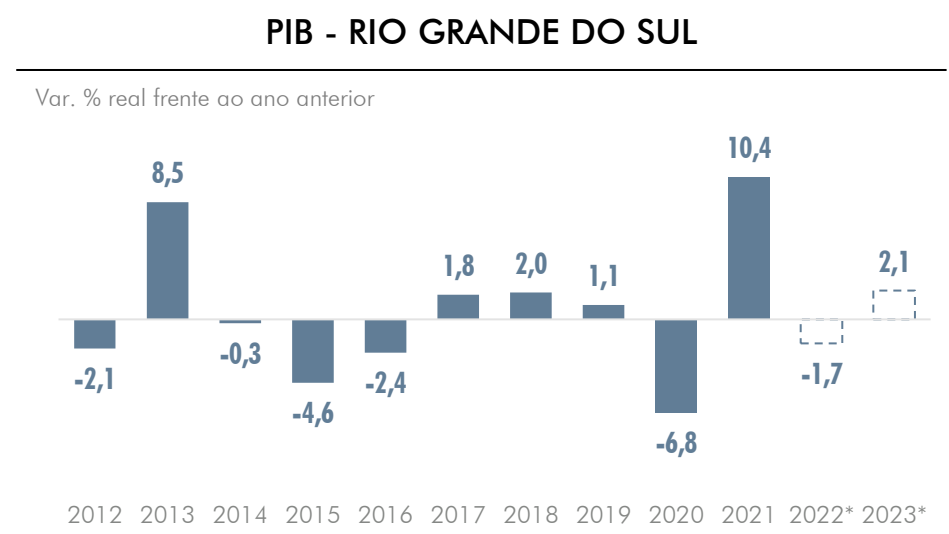
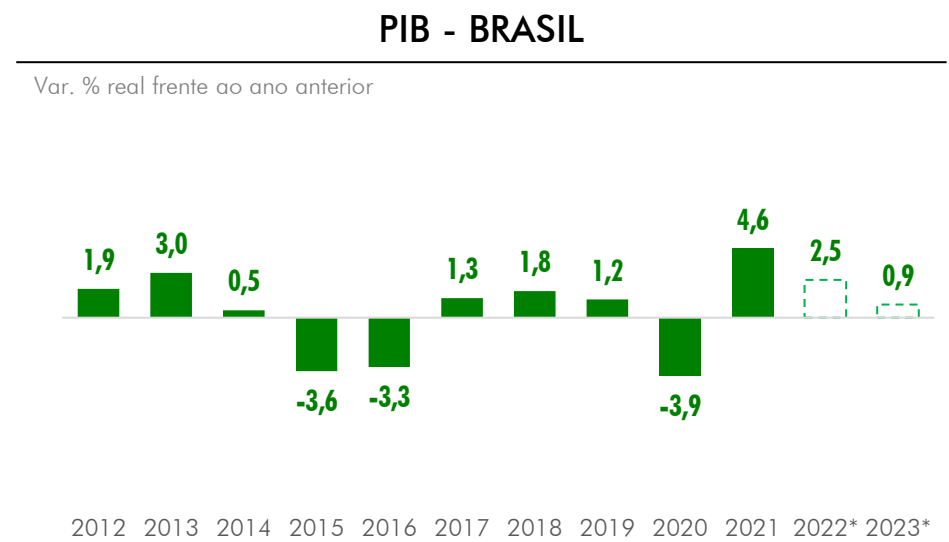
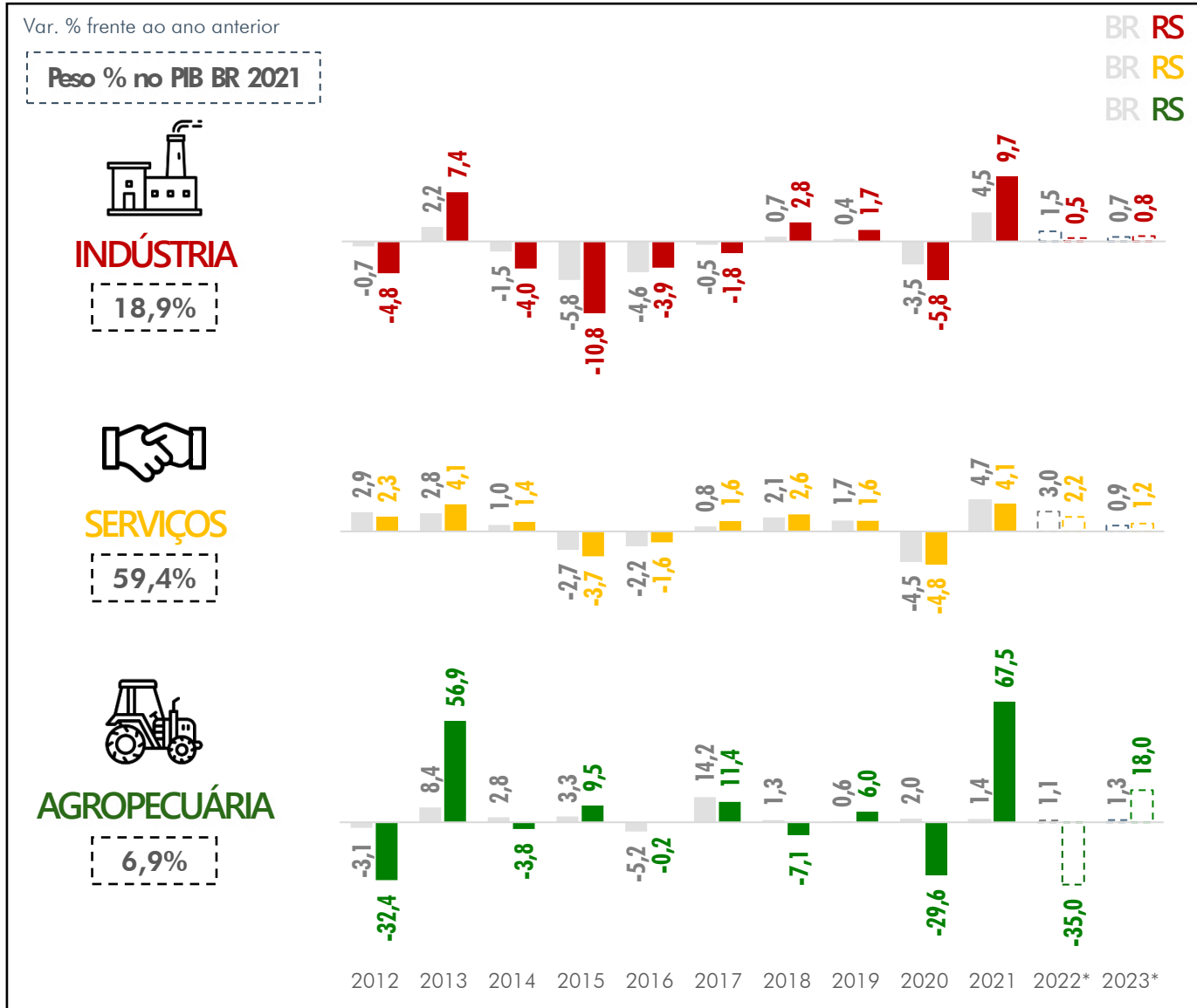


SALDO DA CARTEIRA DE CRÉDITO - % DO PIB

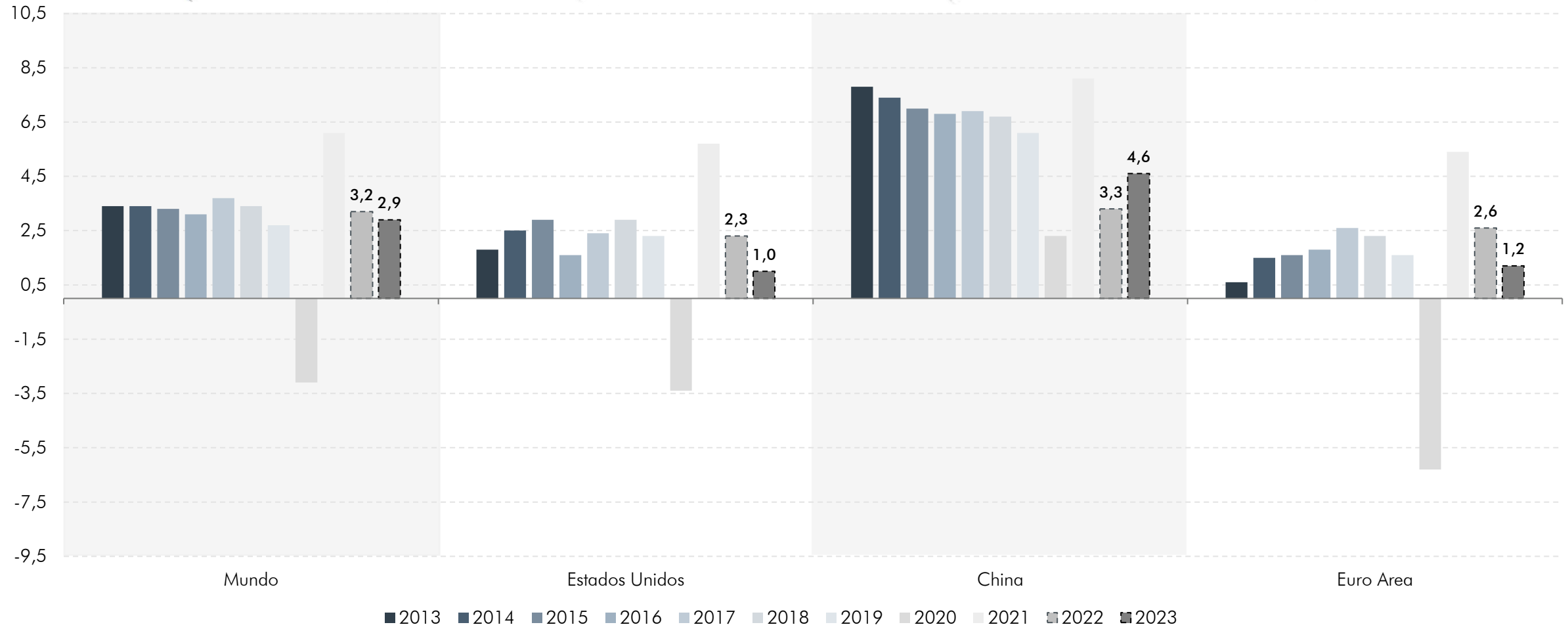






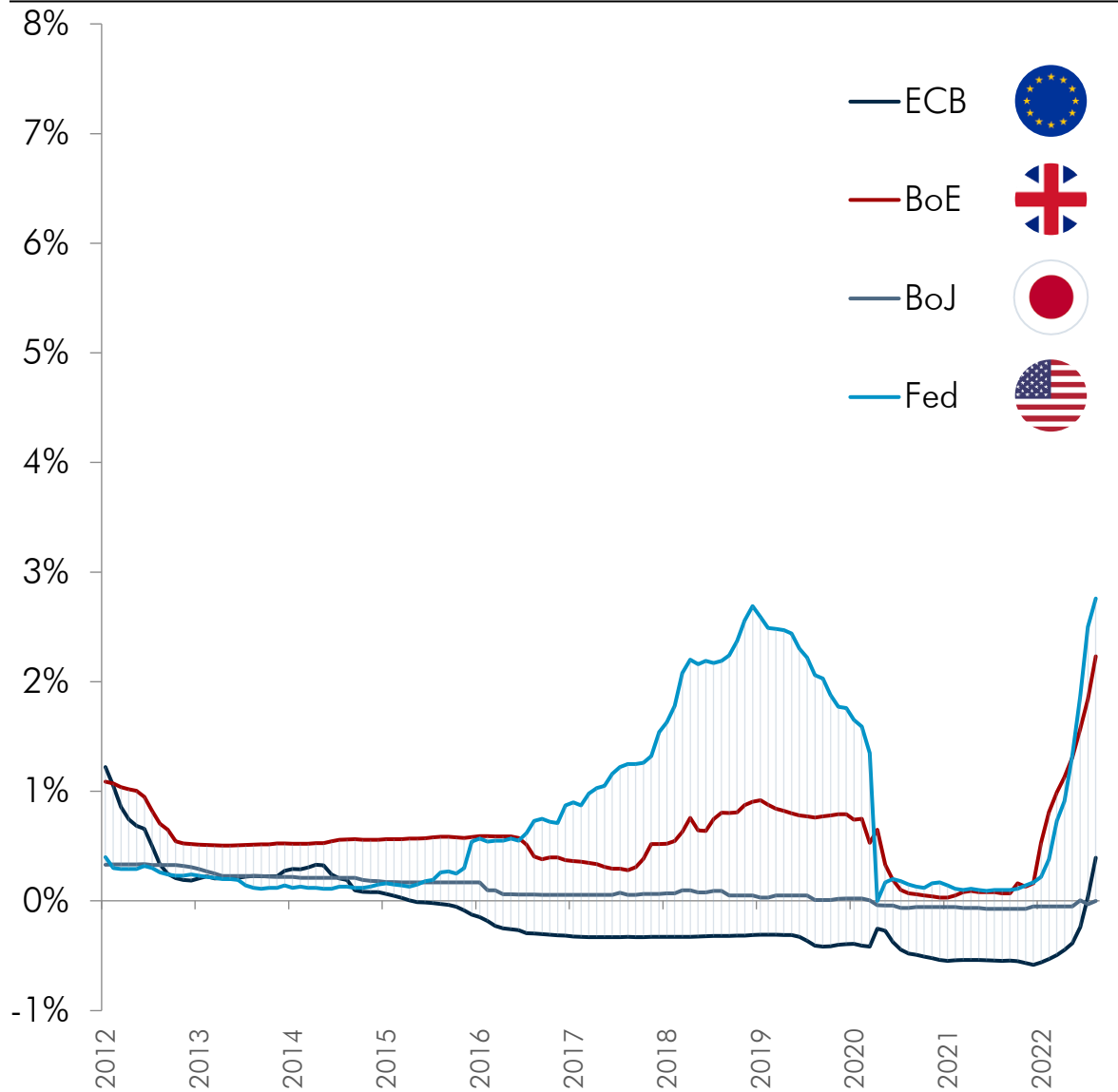


Fonte: IBGE, Bateleur
* Projeções.



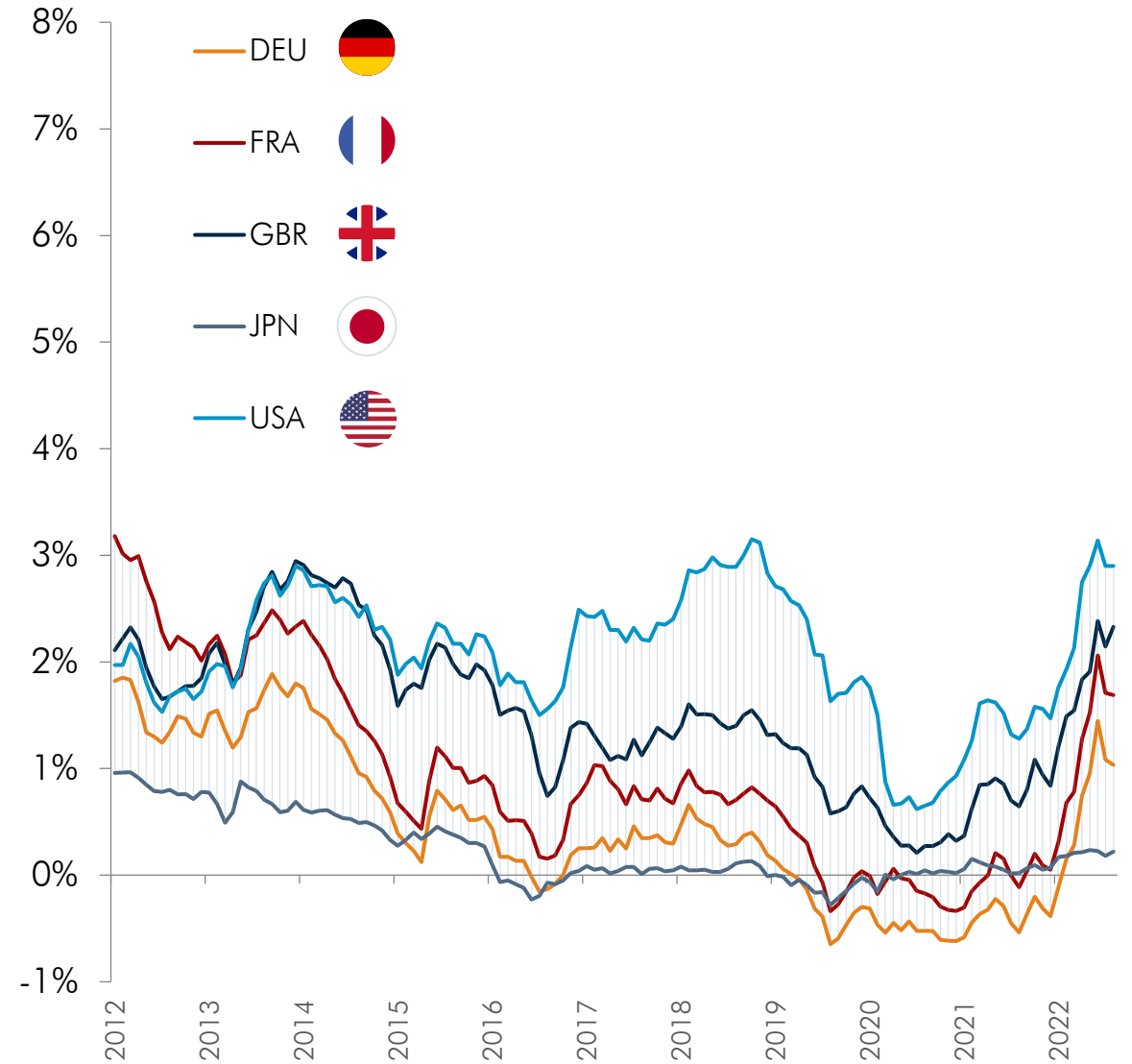
Fonte: FMI – World Economic Outlook

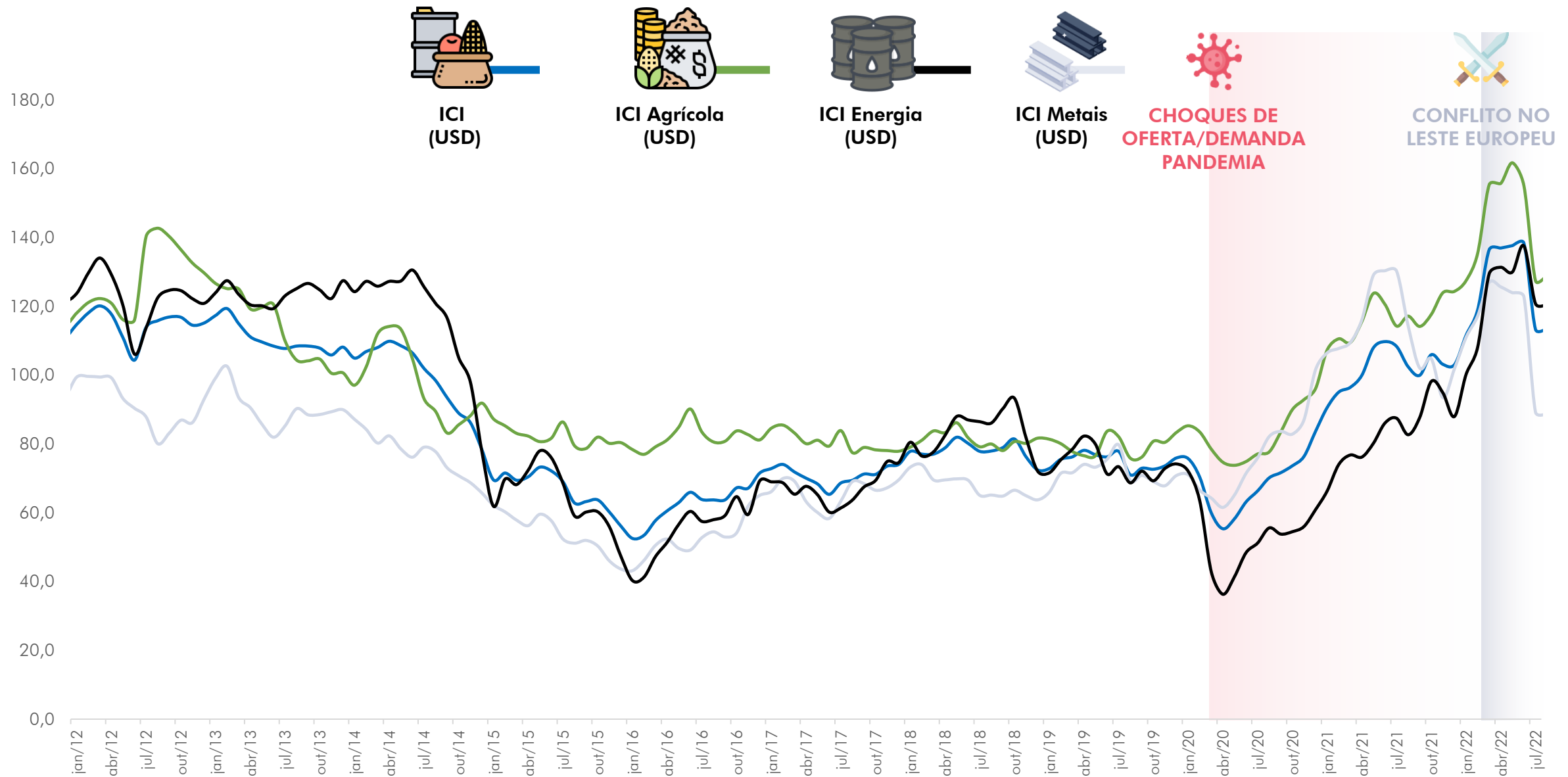
TX BÁSICA DE JUROS DE PAÍSES DESENVOLVIDOS (% a.a.)



Fonte: OCDE
(ECB: European Central Bank; BoE: Bank of England; BoJ: Bank of Japan; Fed: Federal Reserve Bank)

TX DE JUROS DOS TÍTULOS DE 10 ANOS DE PAÍSES DESENV. (% a.a.)





Fonte: Itaú BBA Research

g1

ECONOMIA

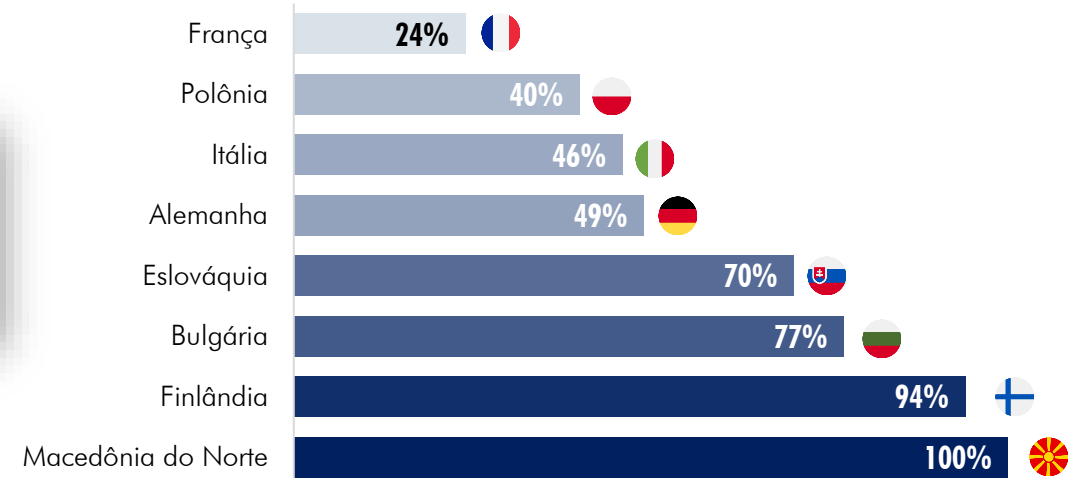
Rússia corta gás à Europa em meio a guerra e disputa por preços

O anúncio ocorre logo após o G7 concordar em limitar o preço do petróleo russo em apoio à Ucrânia.

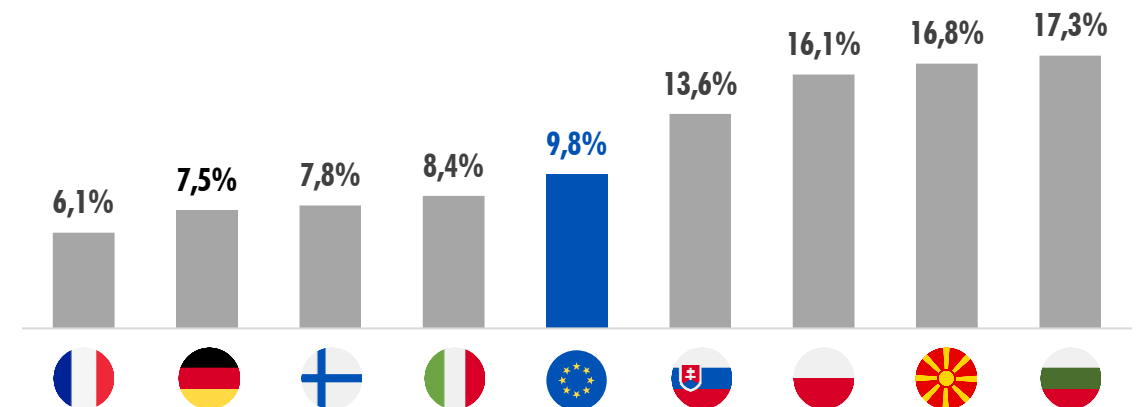


Dependência
24% 100%

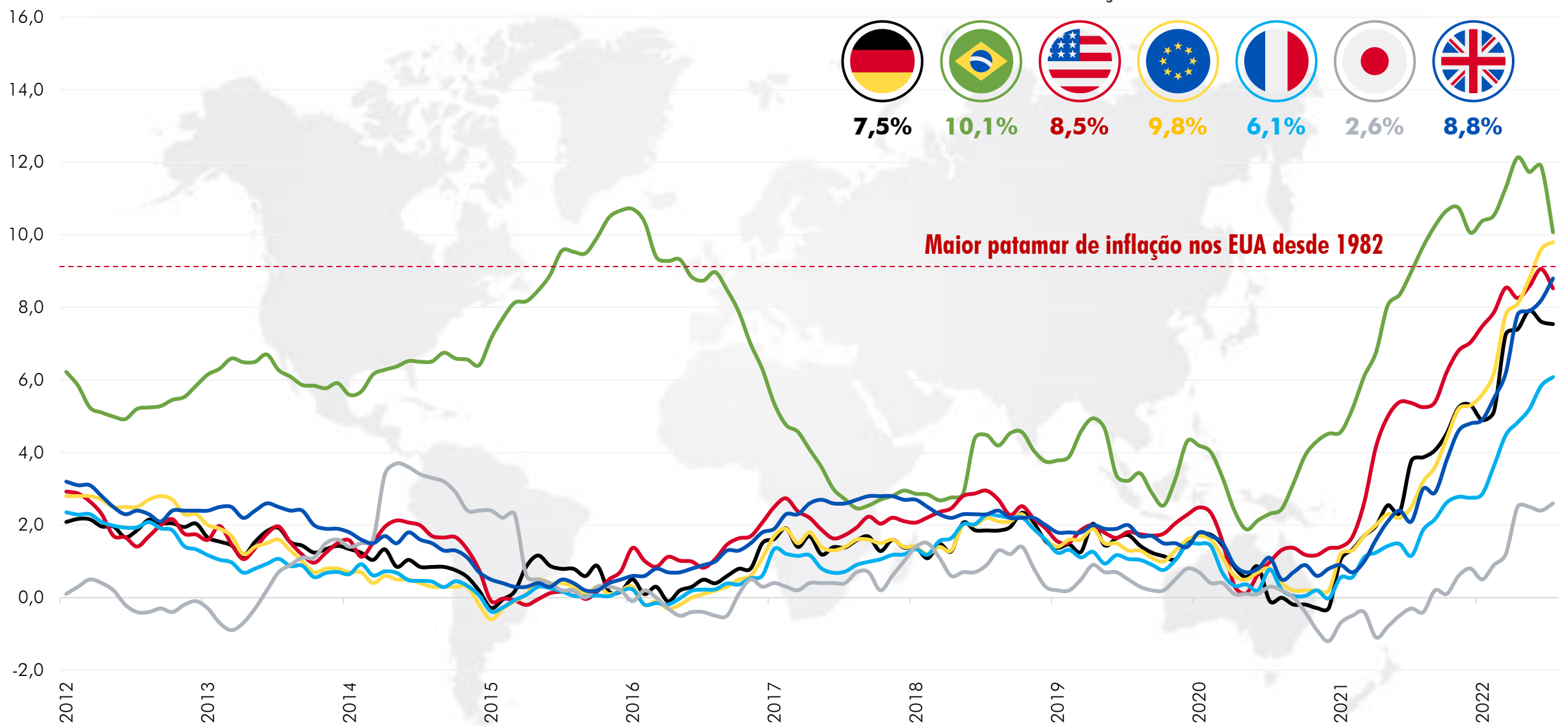
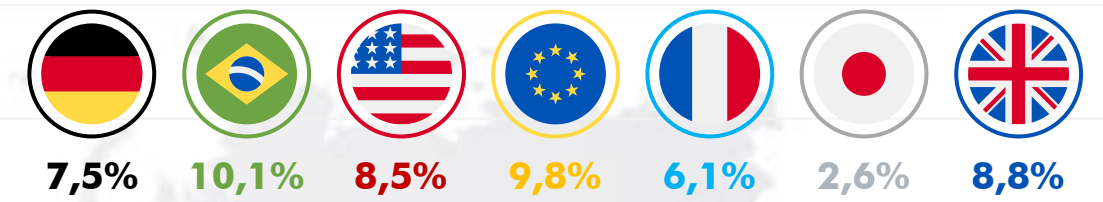
DEPENDÊNCIA POR GÁS RUSSO NA COMPOSIÇÃO DA MATRIZ ENERGÉTICA



INFLAÇÃO AO CONSUMIDOR NOS PAÍSES SELECIONADOS (jul/22)



Os Indicadores de Preços ao Consumidor em Julho de 2022¹:

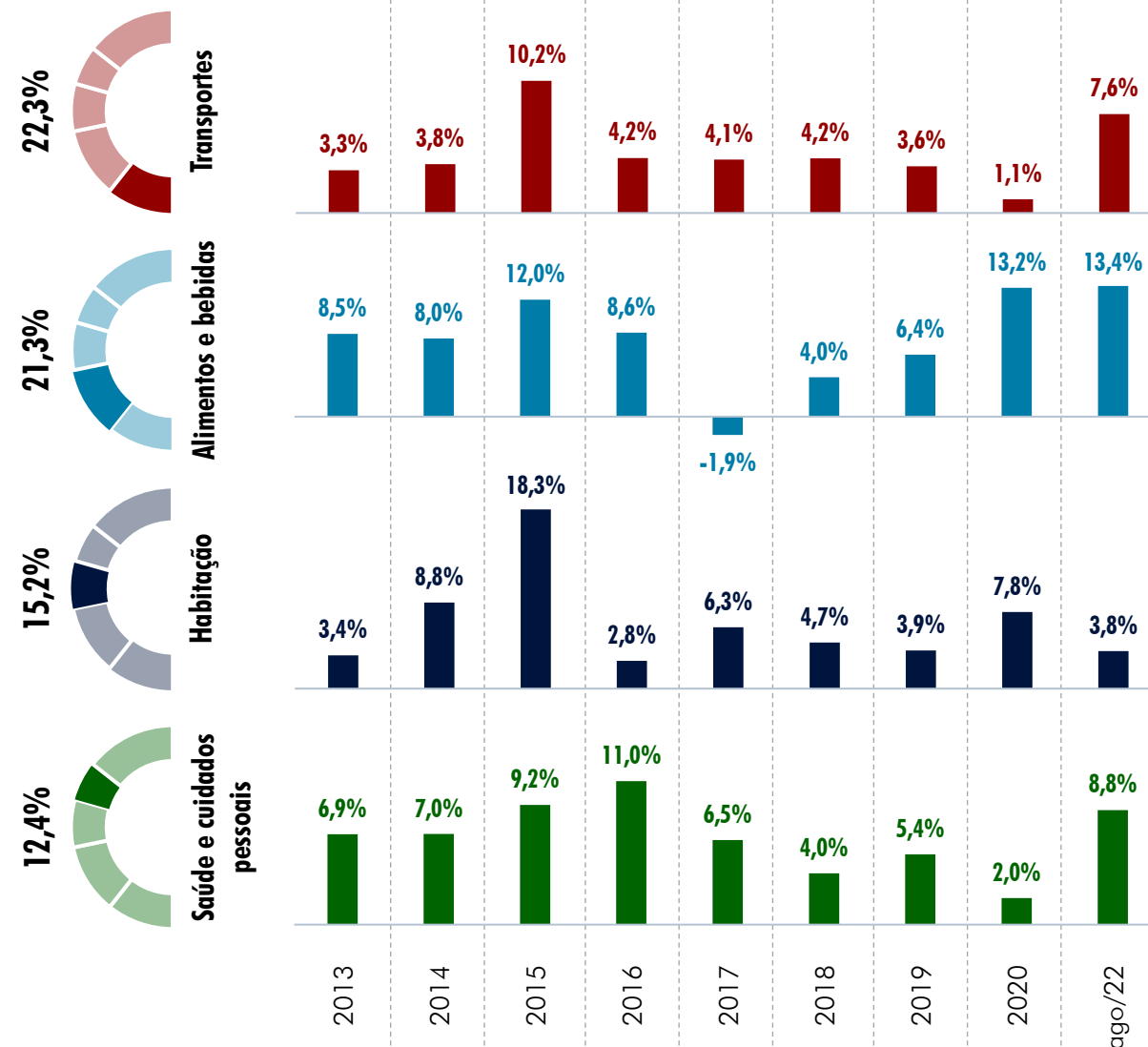
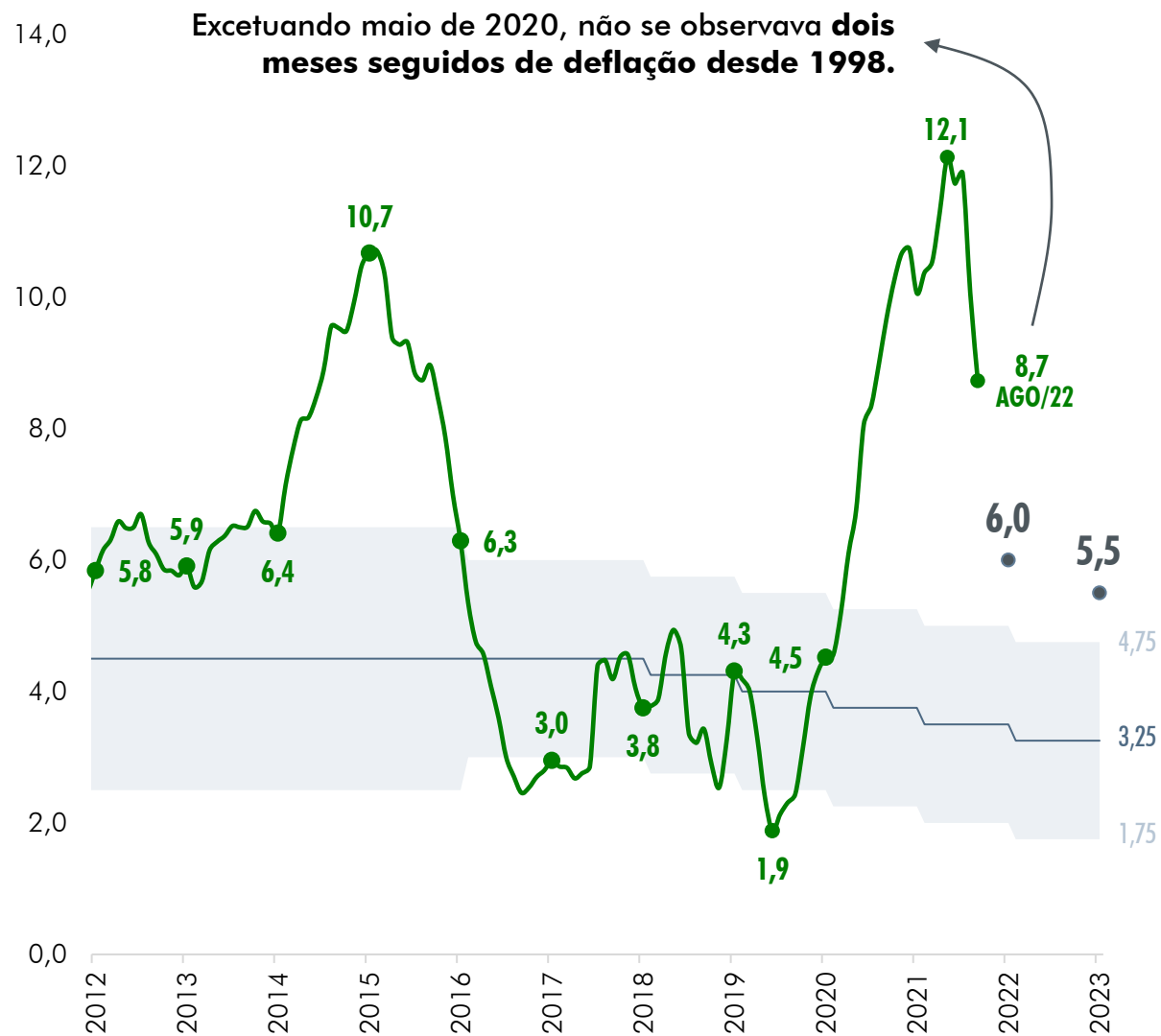


Fonte: OCDE

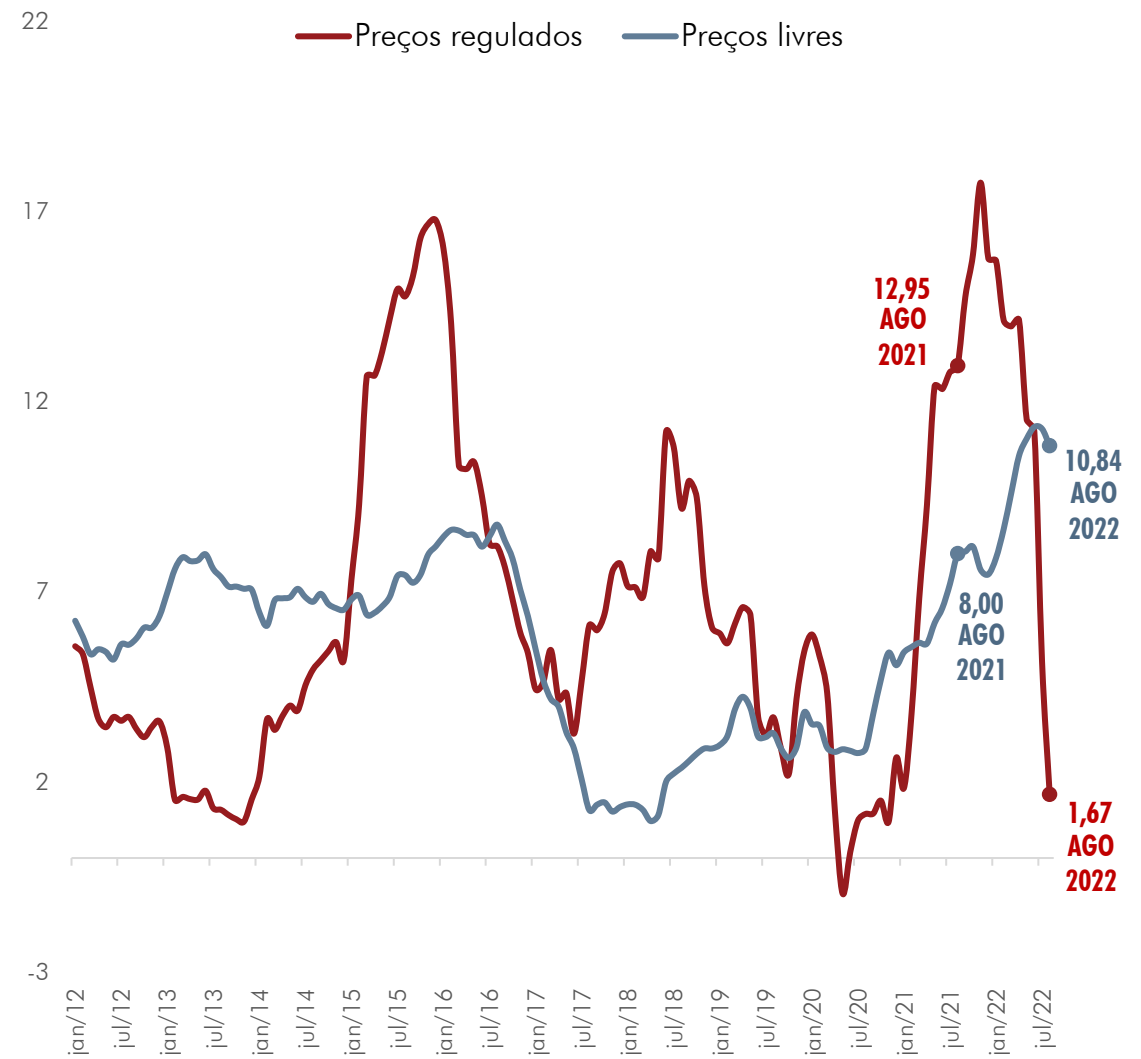
... 19 ... ¹ Variação percentual acumulada nos 12 meses anteriores.



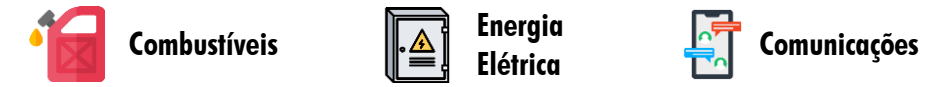
IPCA ACUMULADO EM 12 MESES E PRINCIPAIS COMPONENTES (%)



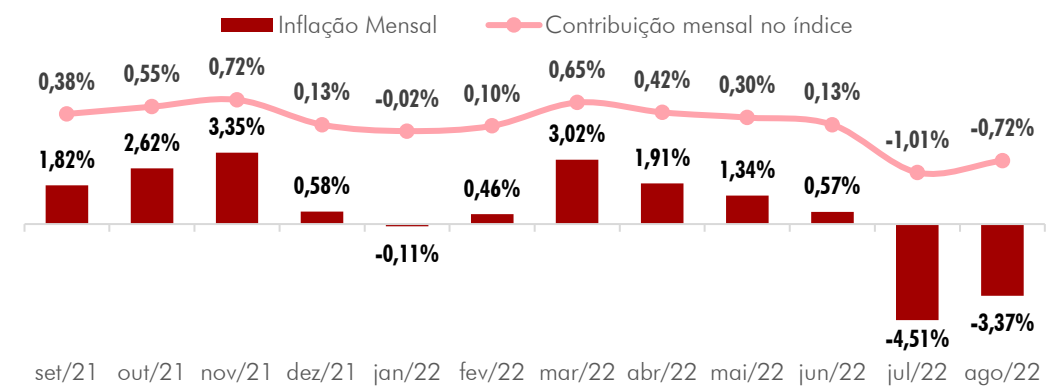
IPCA 12 meses: preços regulados vs. preços livres (%)



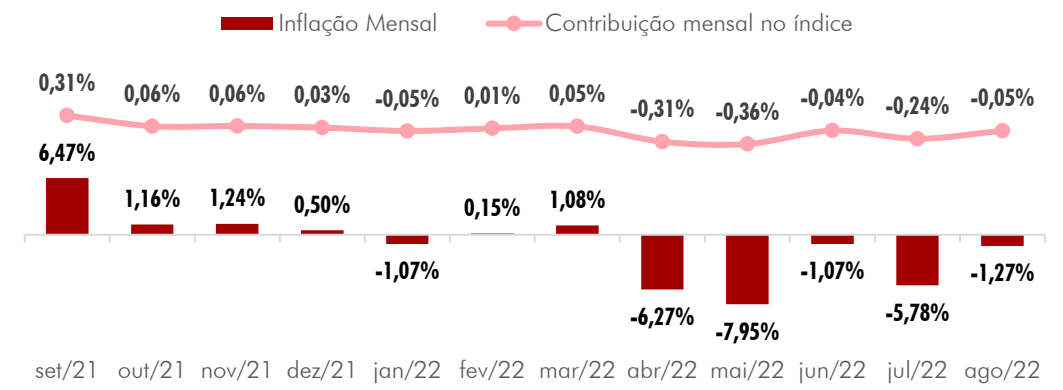
SETORES INFLUENCIADOS PELA REDUÇÃO DO ICMS:

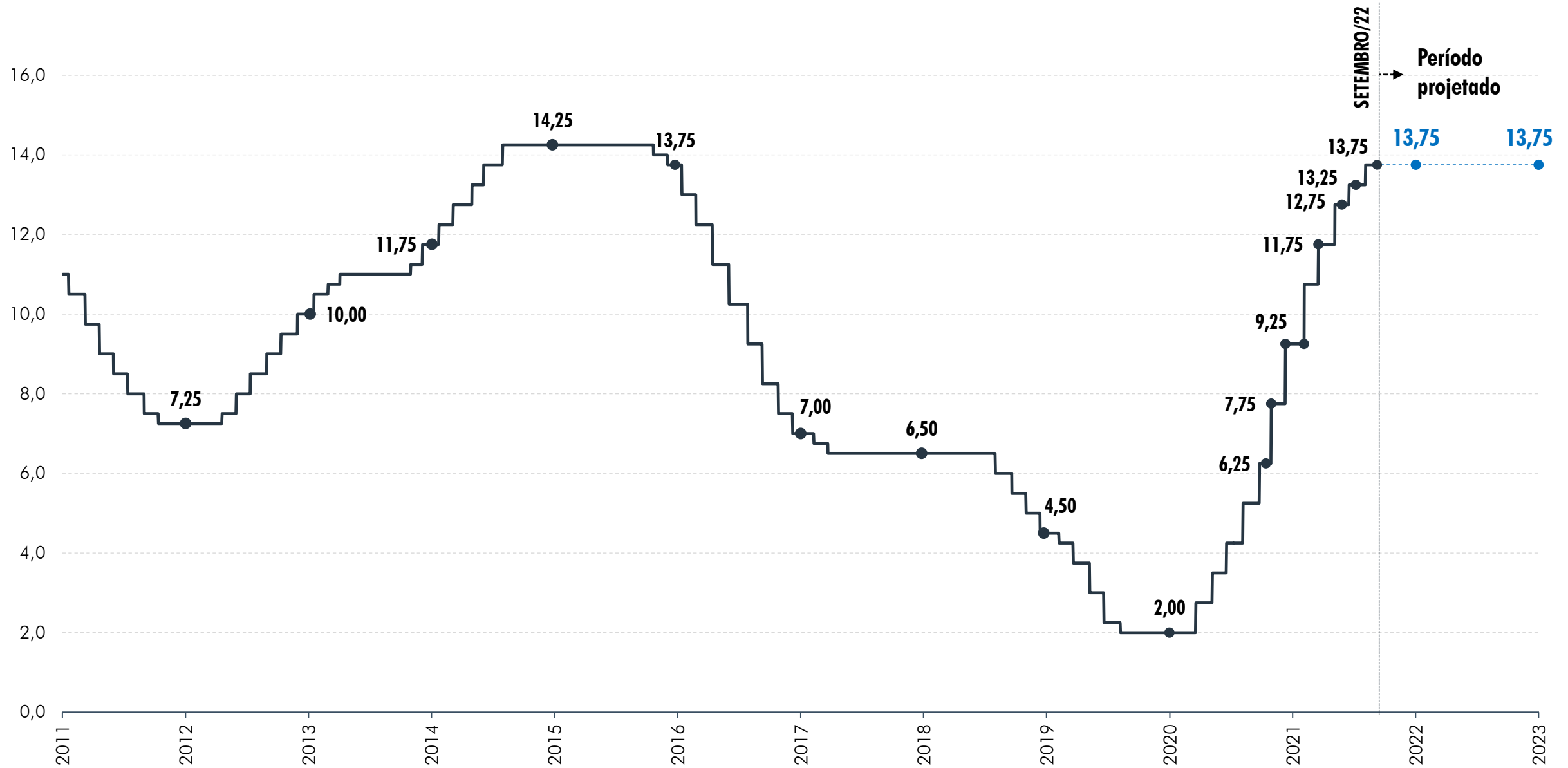


Transportes

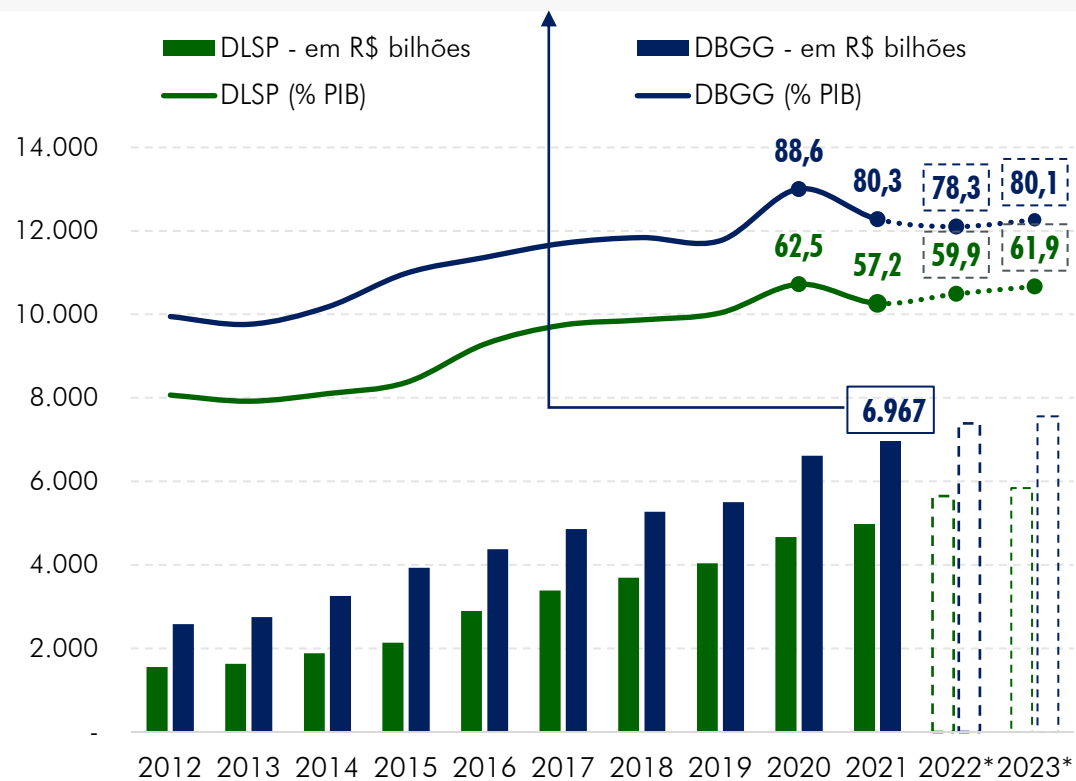
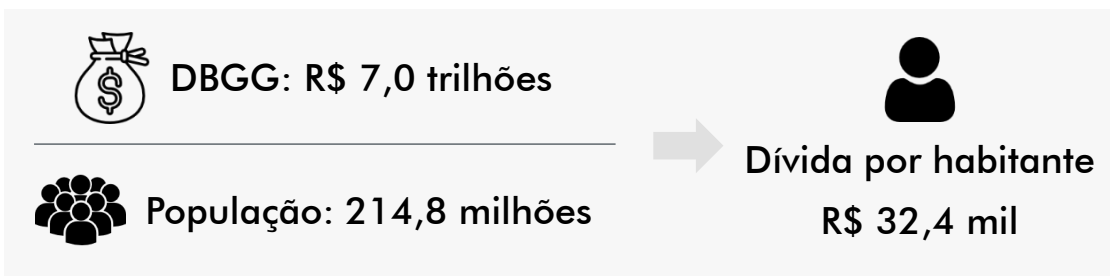


Energia elétrica residencial

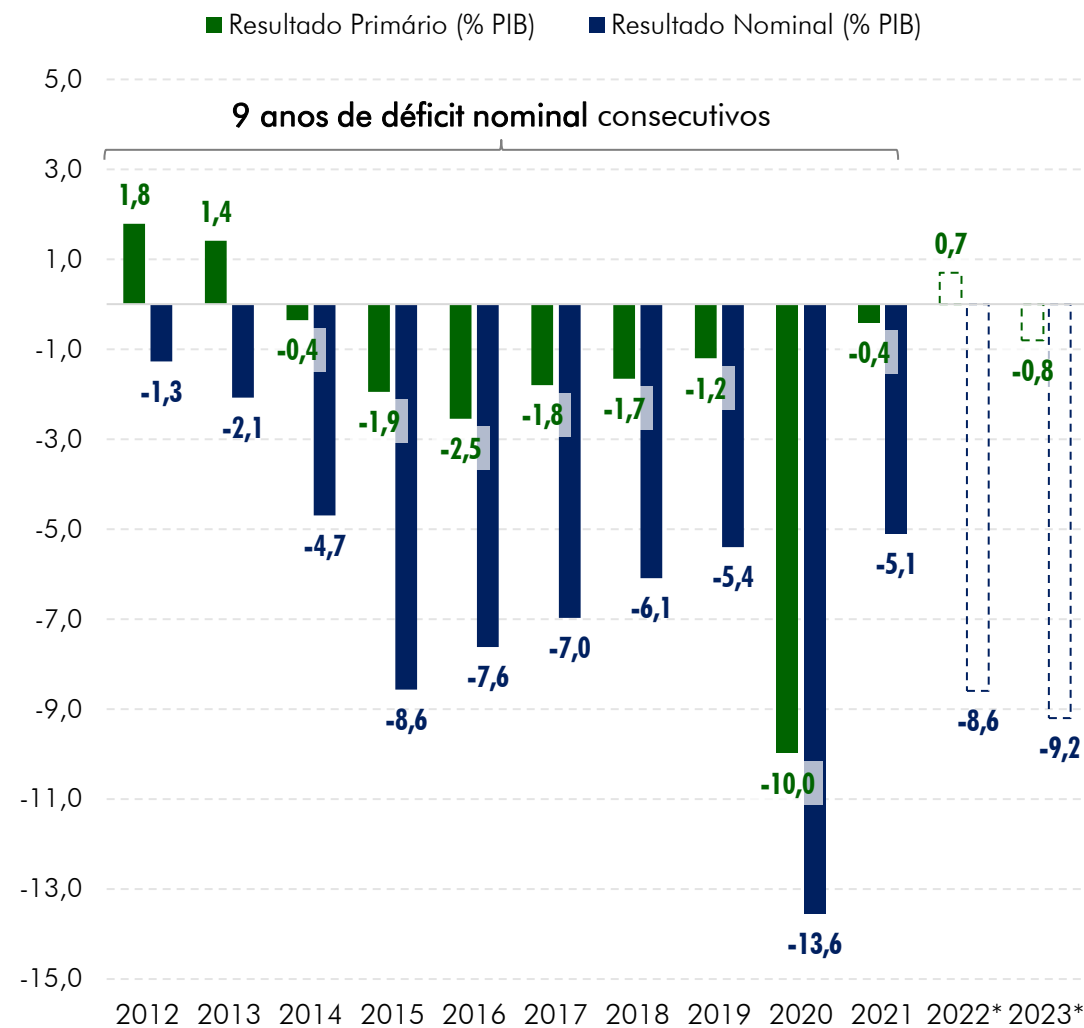




DÍVIDA BRUTA DO GOV. GERAL E DÍVIDA LÍQUIDA DO SETOR PÚBL.



RESULTADO PRIMÁRIO E NOMINAL



Candidato



Nome

Jair Bolsonaro

Partido



Luiz Inácio Lula



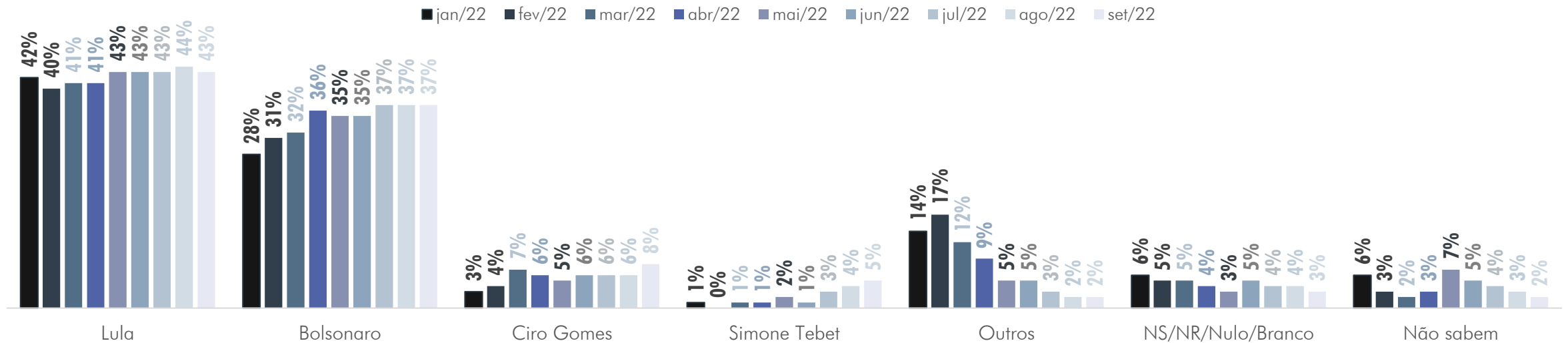
Ciro Gomes



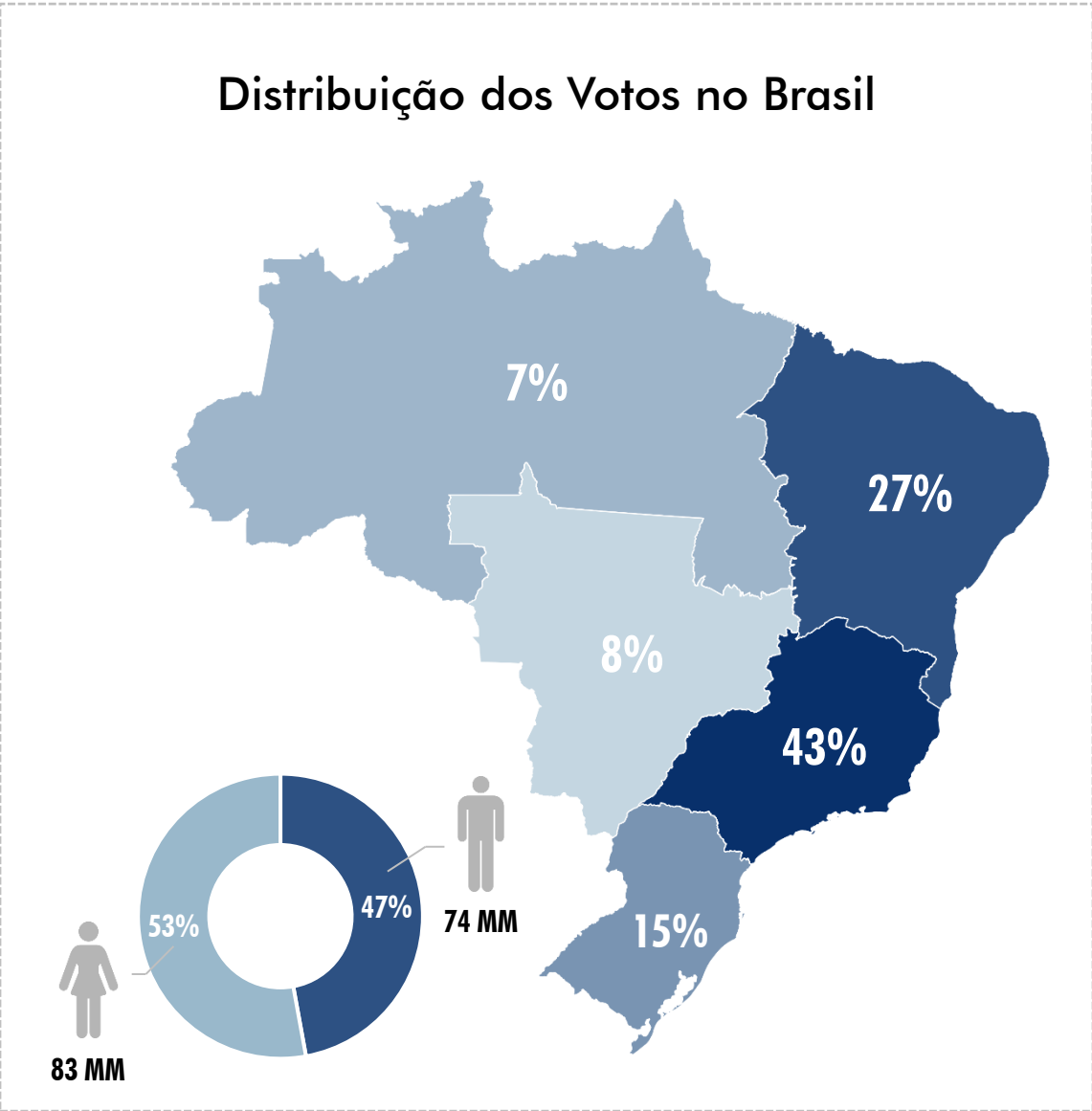
Simone Tebet



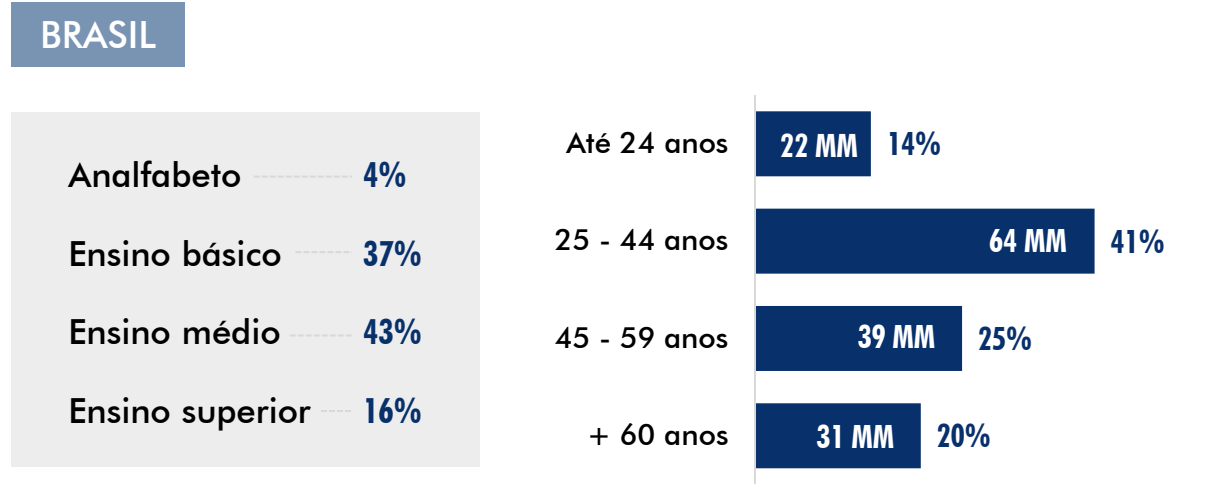
Pesquisa de Voto Espontâneo – 1º Turno



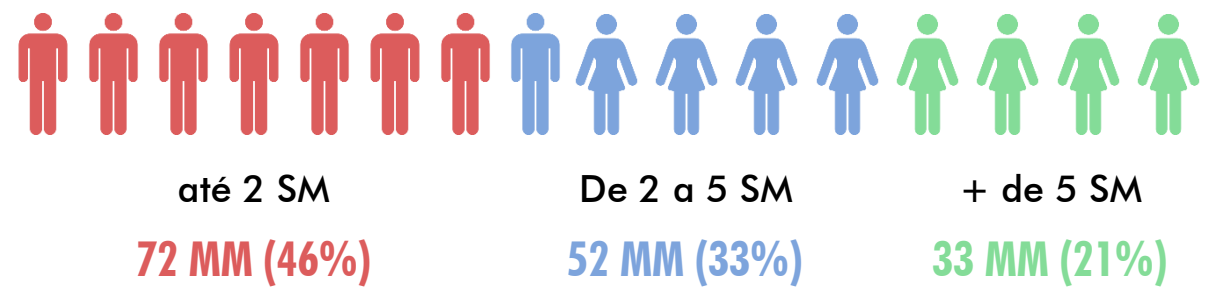
Distribuição dos Votos no Brasil



Perfil do Eleitor



Renda Familiar

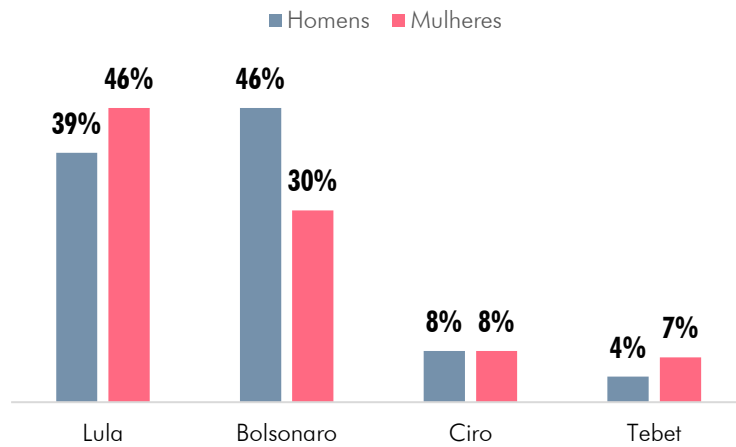


Total de eleitores do Brasil

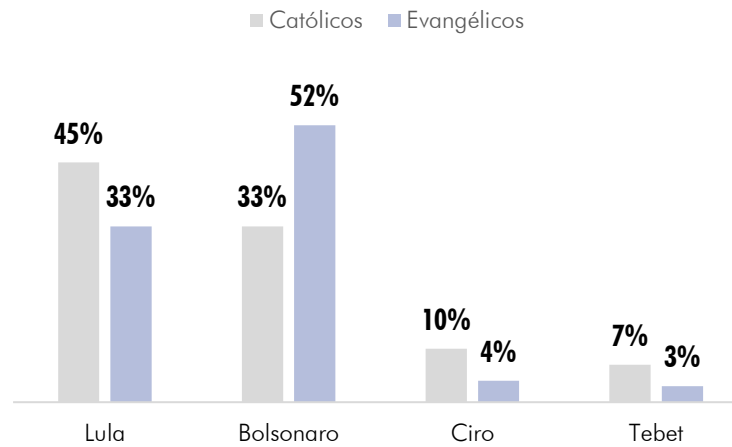
156,5 milhões

Fonte: Tribunal Superior Eleitoral, IBGE

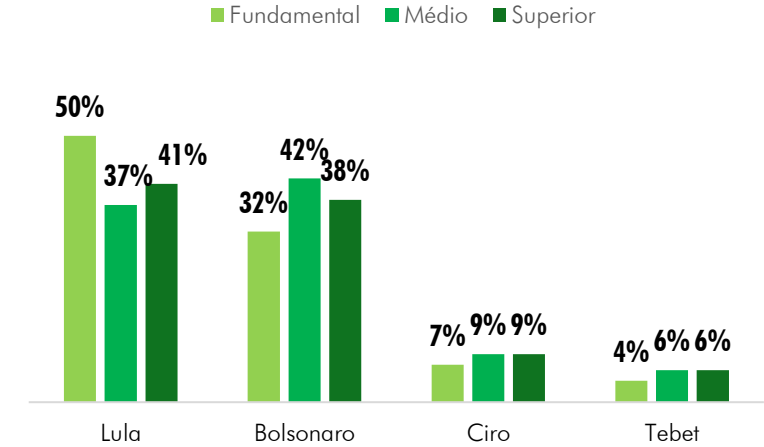
Intenção de voto por sexo



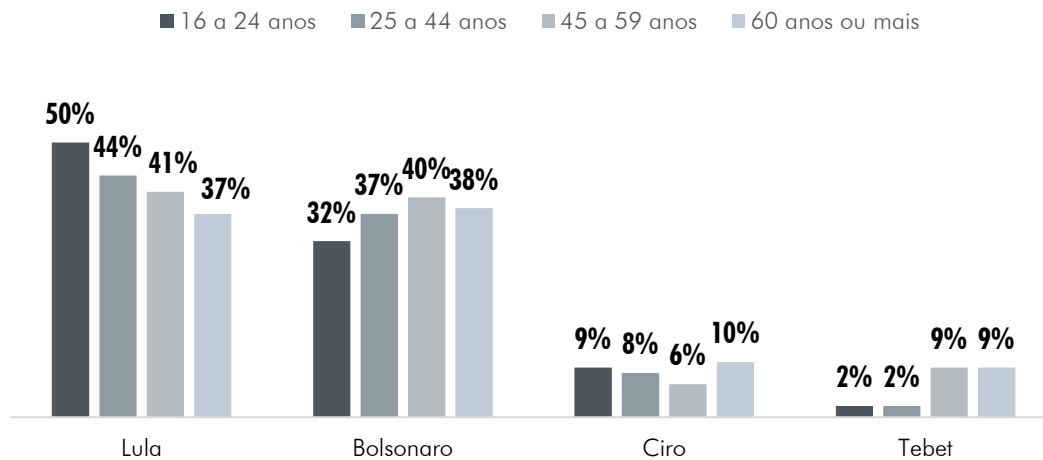
Intenção de voto por religião



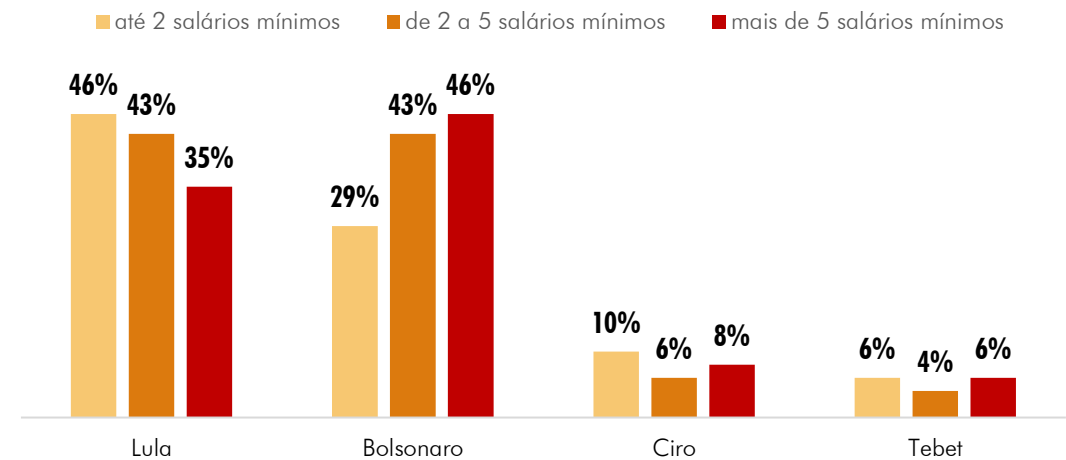
Intenção de voto por escolaridade



Intenção de voto por idade



Intenção de voto por faixa de renda



Empate Técnico
 Vantagem Lula



Candidato				
Norte 	46% 	38% 	9% 	2%
Nordeste 	Lula 50% 	Bolsonaro 30% 	Ciro 9% 	Tebet 3%
Centro-Oeste 	Lula 42% 	Bolsonaro 42% 	Ciro 4% 	Tebet 6%
Sudeste 	Lula 37% 	Bolsonaro 38% 	Ciro 9% 	Tebet 7%
Sul 	Lula 42% 	Bolsonaro 45% 	Ciro 5% 	Tebet 3%
	Lula	Bolsonaro	Ciro	Tebet



O CRESCIMENTO BRASILEIRO:

CONDICIONANTES:



Privatizações



Concessões



Reformas Estruturais



Segurança Jurídica



Abertura Econômica



Estabilidade Fiscal



RESULTADOS E EXPECTATIVAS

		2018	2019	2020	2021	2022*	2023*
BRASIL							
PIB	Var. anual (%)	1,78	1,22	-3,88	4,62	2,52	0,89
IPCA	Var. anual (%)	3,75	4,31	4,52	10,06	6,00	5,50
Meta Selic	Final do per. (% a.a.)	6,50	4,50	2,00	9,25	13,75	13,75
Câmbio	Final do per. (R\$/US\$)	3,87	4,03	5,20	5,58	5,10	5,00
RIO GRANDE DO SUL							
PIB	Var. anual (%)	1,96	1,06	-6,78	10,36	-1,74	2,11

* Projeções.

FERNANDO A. MARCHET

fernando.marchet@bateleur.com.br

*Vice Presidente e Coordenador do Núcleo de
Economia da Federasul*

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Guilherme Hruby – guilherme.hruby@bateleur.com.br



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