



hrvatski izvoznici
croatian exporters

14

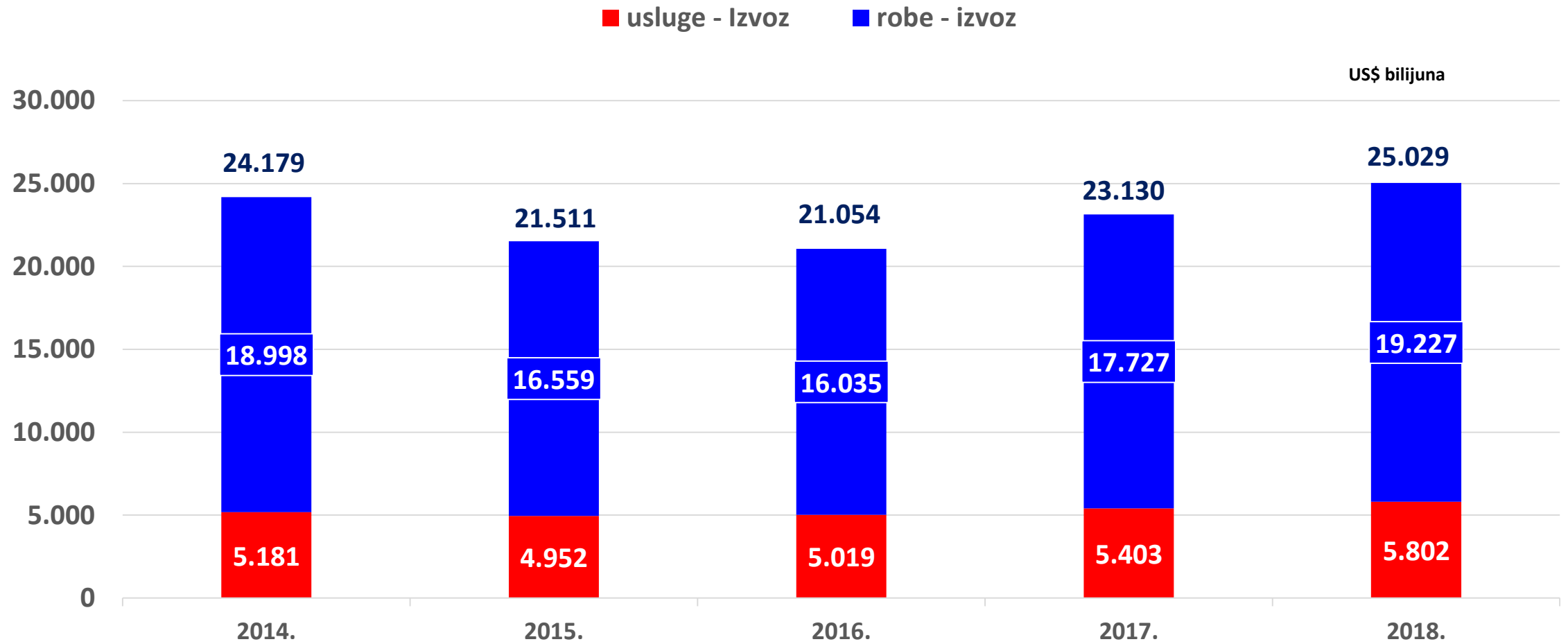
konvencija hrvatskih izvoznika

pod visokim pokroviteljstvom Vlade Republike Hrvatske

**ULOGA IZVOZA U MODERNOJ
GOSPODARSKOJ POLITICI**

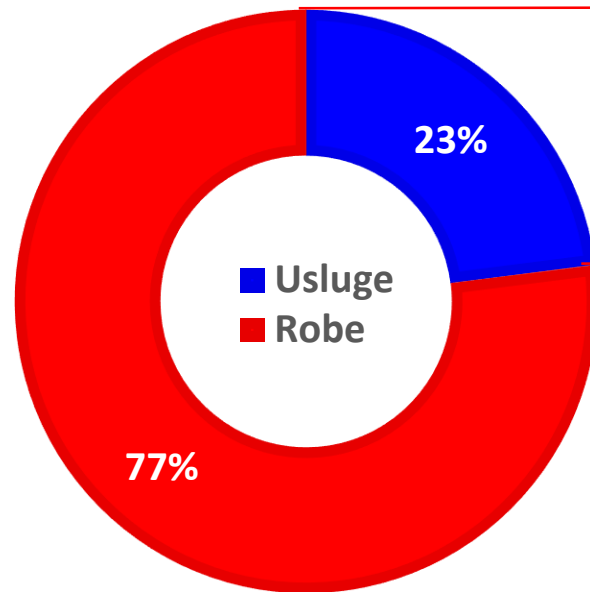
Darinko Bago
predsjednik Hrvatskih izvoznika

Svjetski bruto izvoz od 2014 – 2018. godine

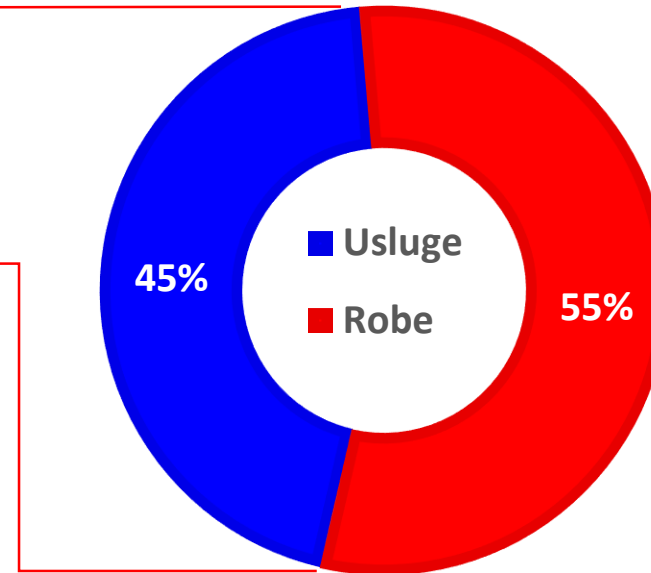


Izvoz usluga kao udio u svjetskom bruto izvozu i dodanoj vrijednosti, 2018

Izvoz usluga kao udio bruto svjetskog izvoza

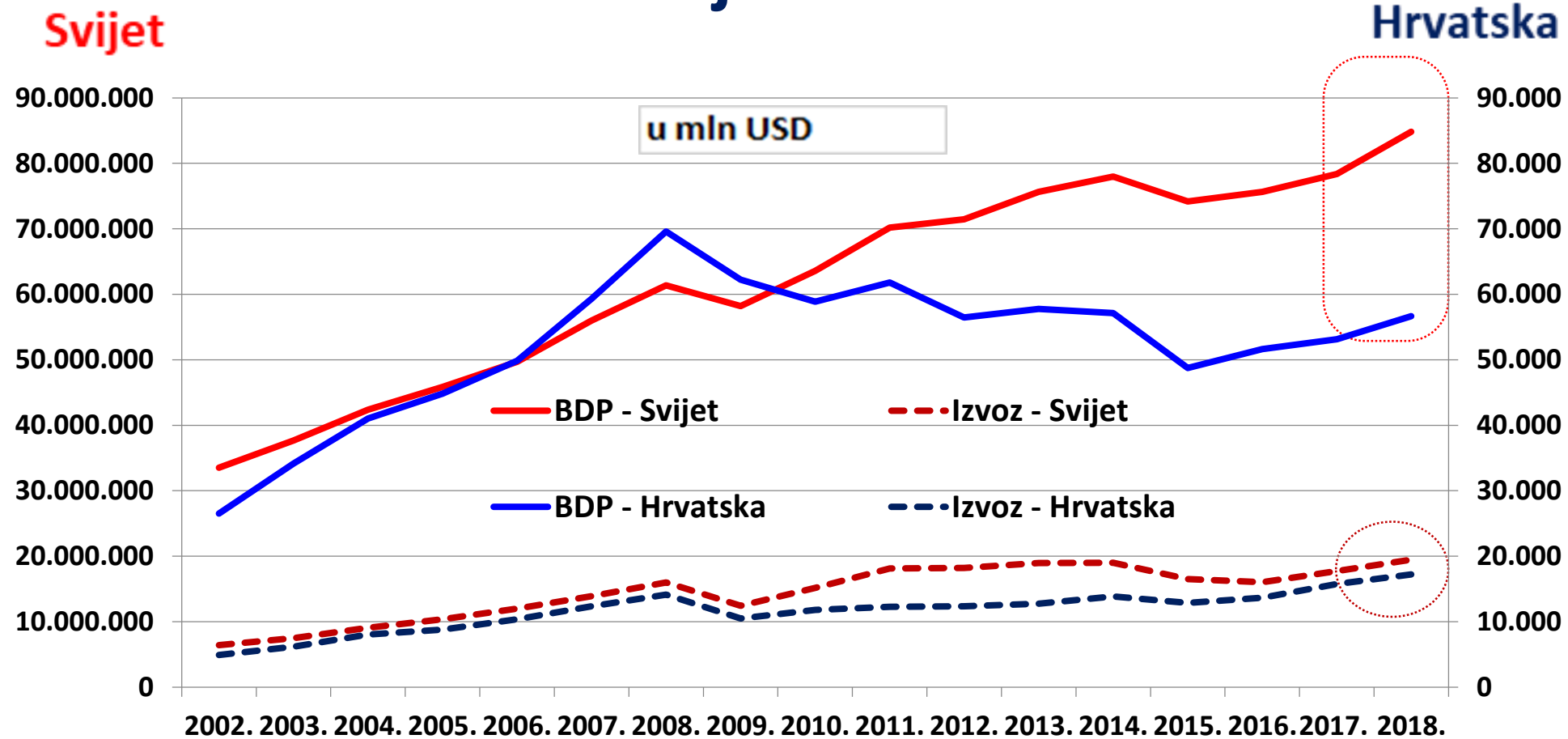


Dodana vrijednost usluga kao udio dodane vrijednosti u svjetskom izvozu

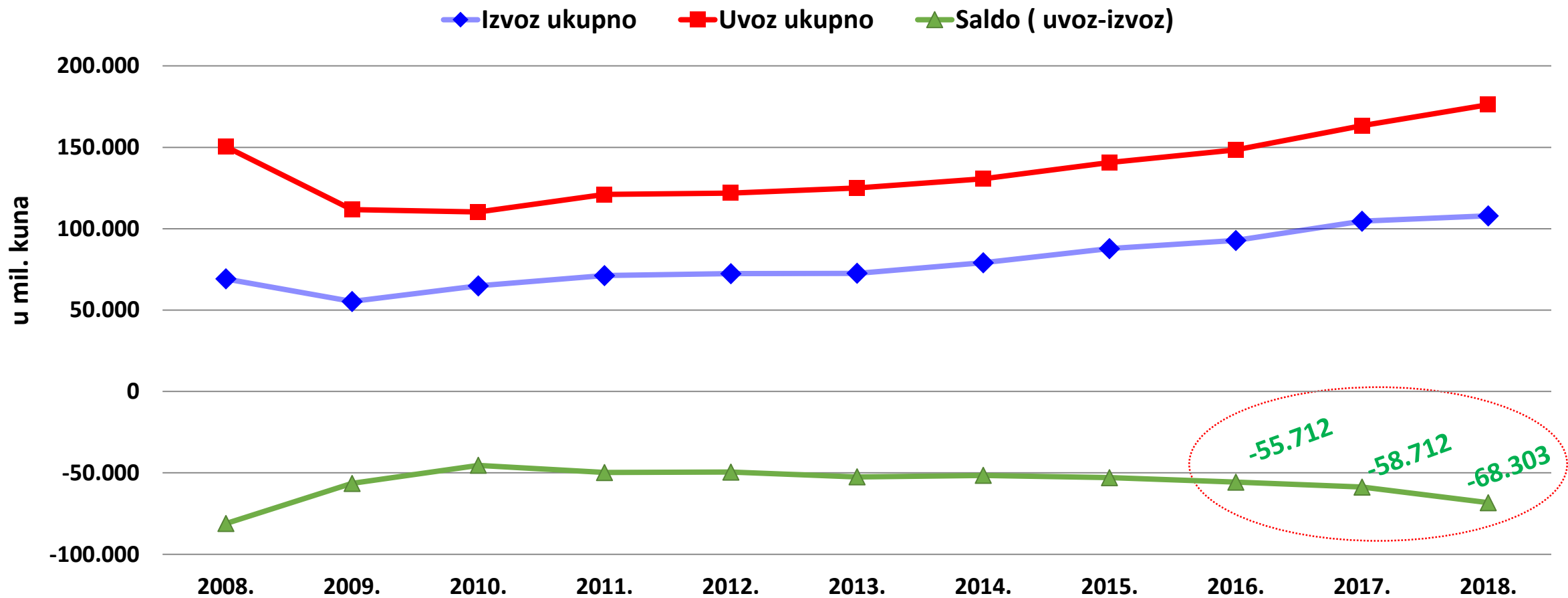


Iako usluge izravno čine samo 23% svjetske trgovine, one čine 45% ukupne dodane vrijednosti u svjetskom izvozu

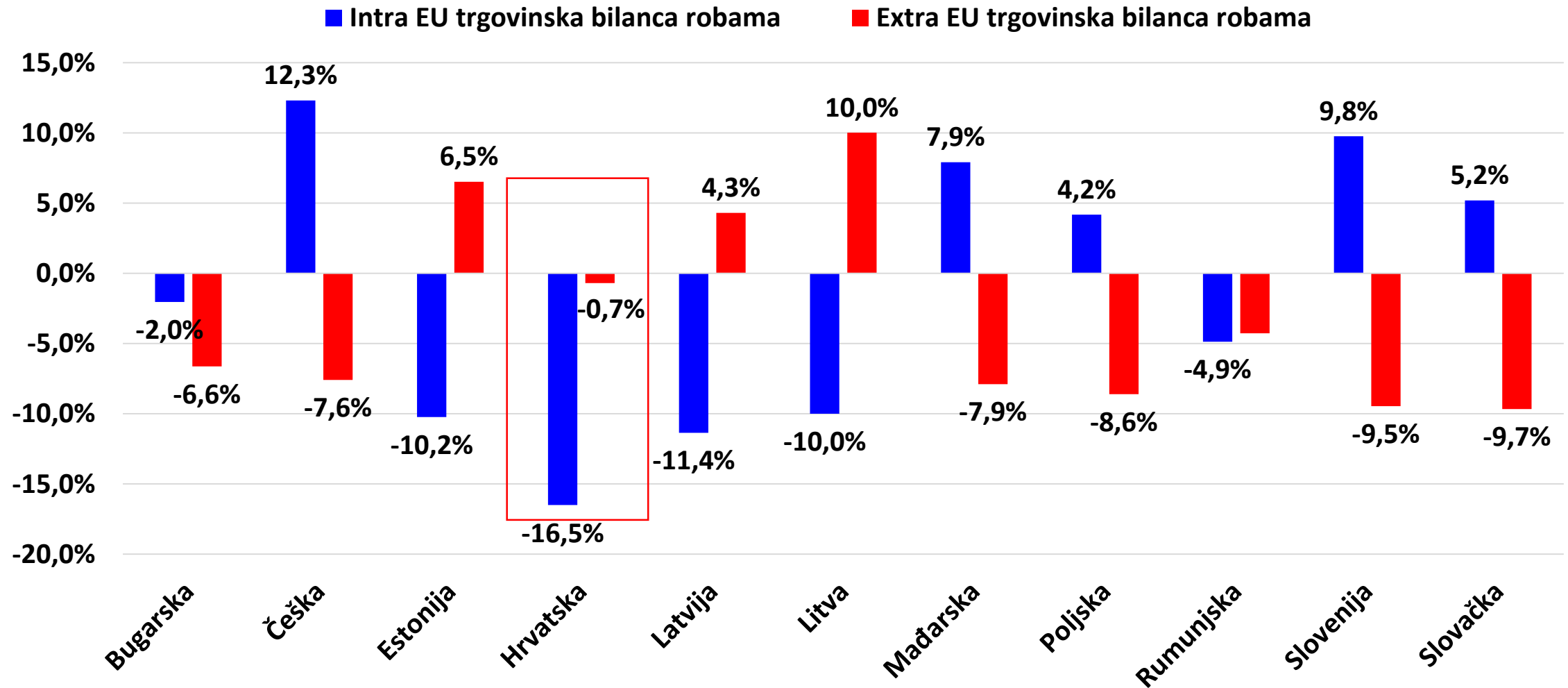
Udio robnog izvoza u BDP-u Svijet - Hrvatska



Izvoz i uvoz roba RH 2008 - 2018. godine

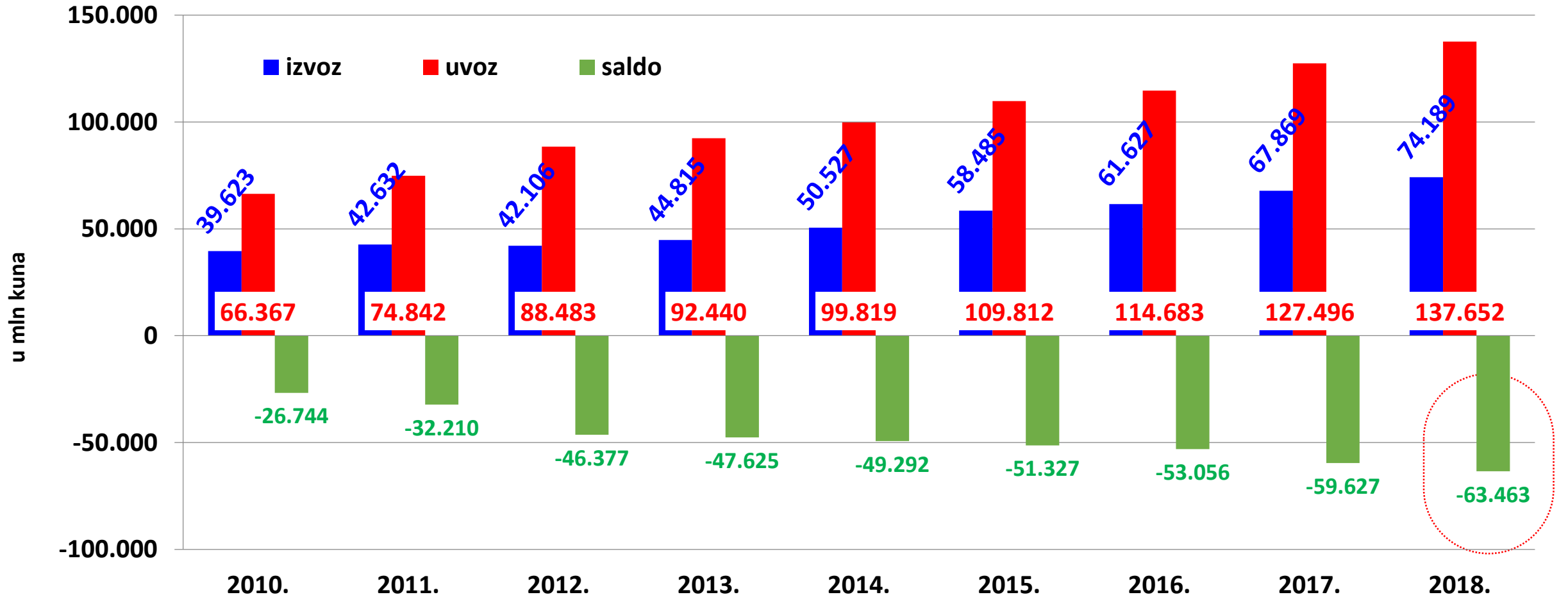


Saldo Intra EU i Extra EU trgovinske bilance robama, u % BDP-a; 2018. godine

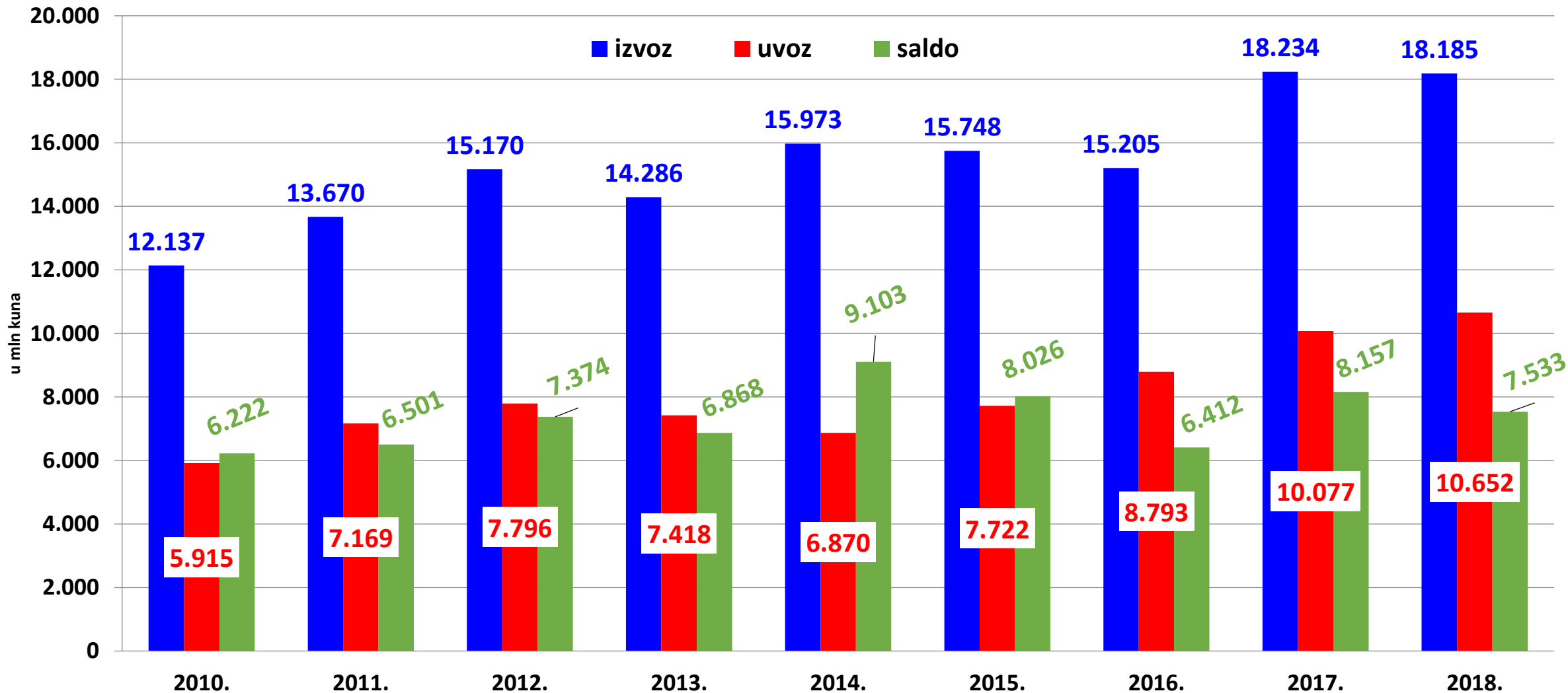


Izvoz i uvoz roba RH - zemlje EU

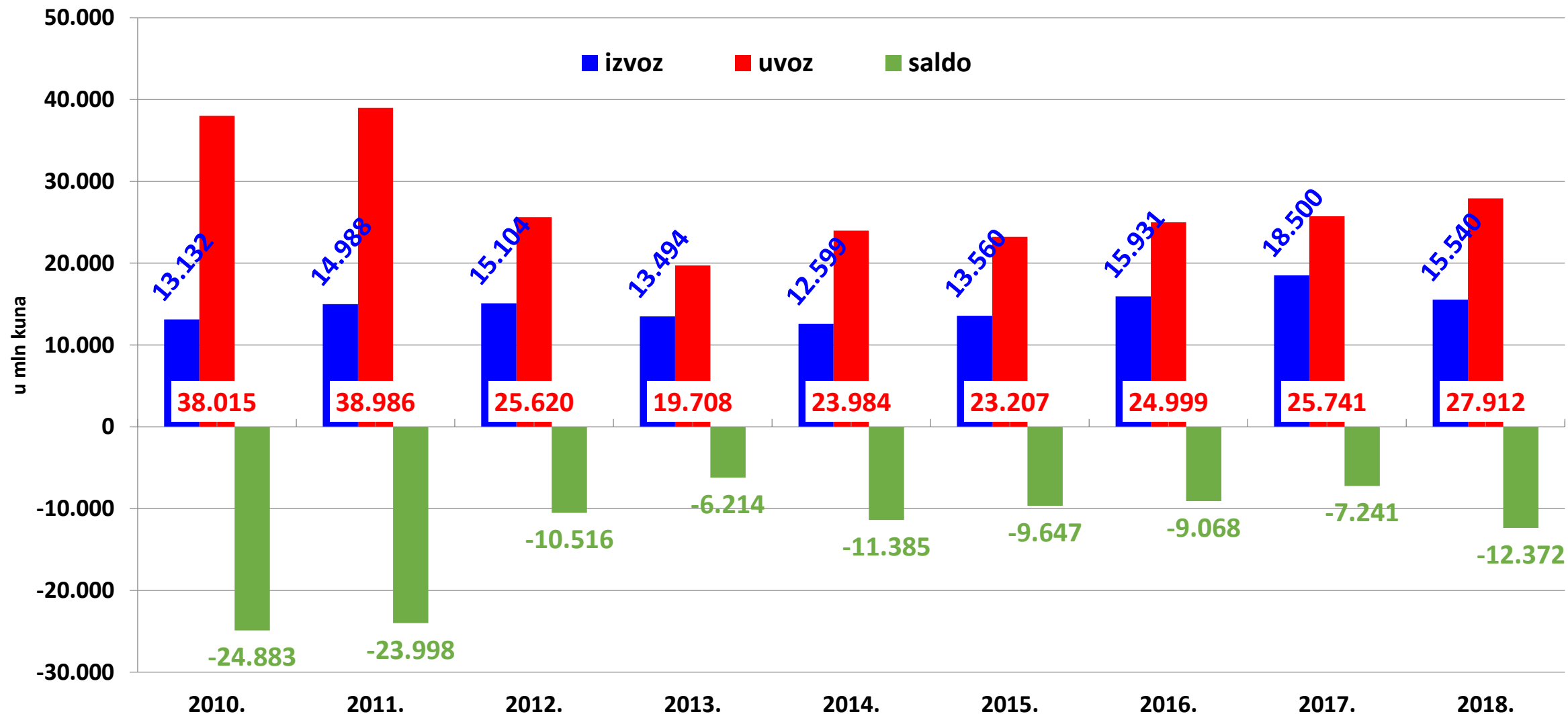
2010 - 2018.godine



Izvoz i uvoz roba RH - zemlje CEFTA-e 2010 - 2018. godine



Izvoz i uvoz roba RH – ostale zemlje 2010 - 2018.godine



Saldo izvoz-uvoz za karakteristične djelatnosti

u mln kuna

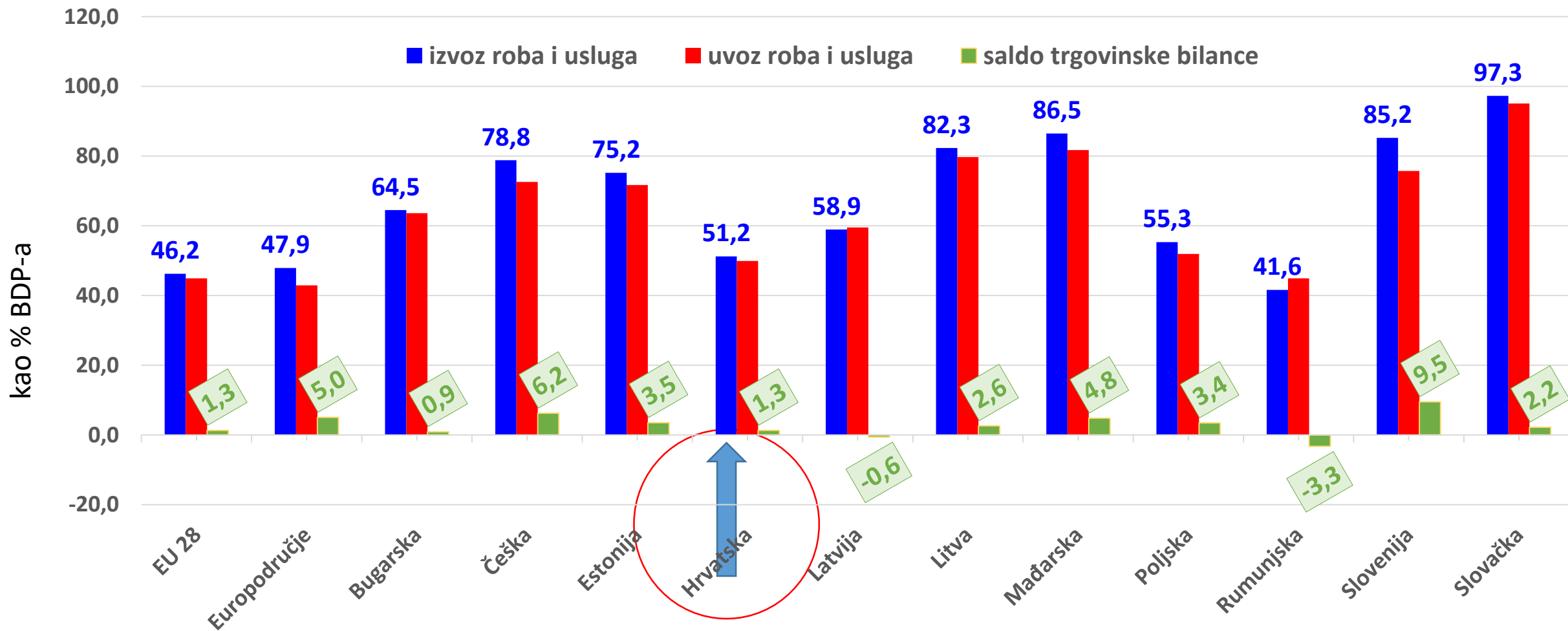
| | 2012. | 2013. | 2014. | 2015. | 2016. | 2017. | 2018. | Ukupno 2012.-2018. |
|--------------------------|--------|--------|--------|--------|--------|--------|--------|-----------------------|
| drvena industrija | 1.534 | 1.723 | 2.361 | 2.527 | 2.466 | 2.555 | 2.738 | 15.904 |
| namještaj | 158 | 460 | 723 | 689 | 533 | 161 | -591 | 2.133 |
| metalni proizvodi | -4.028 | -4.194 | 757 | 1.005 | 1.437 | 1.078 | 814 | -3.131 |
| koža | 9 | -944 | -1.465 | -1.040 | -1.739 | -1.539 | -1.348 | -8.066 |
| odjeća | -538 | -698 | -1.405 | -1.613 | -2.109 | -2.307 | -2.789 | -11.459 |
| farmacija | -1.733 | -1.839 | -2.207 | -2.008 | -2.618 | 295 | -2.004 | -12.114 |
| koks, el. energija, plin | -3.419 | -2.053 | -3.666 | -3.441 | -1.969 | -863 | 335 | -15.076 |
| kemikalije | -5.686 | -5.524 | -5.616 | -6.096 | -6.602 | -6.881 | -7.020 | -43.425 |
| prehrana | -5.157 | -5.967 | -6.174 | -6.421 | -5.898 | -7.145 | -8.043 | -44.805 |

RH – izvoz/uvoz 2012 - 2018.godine

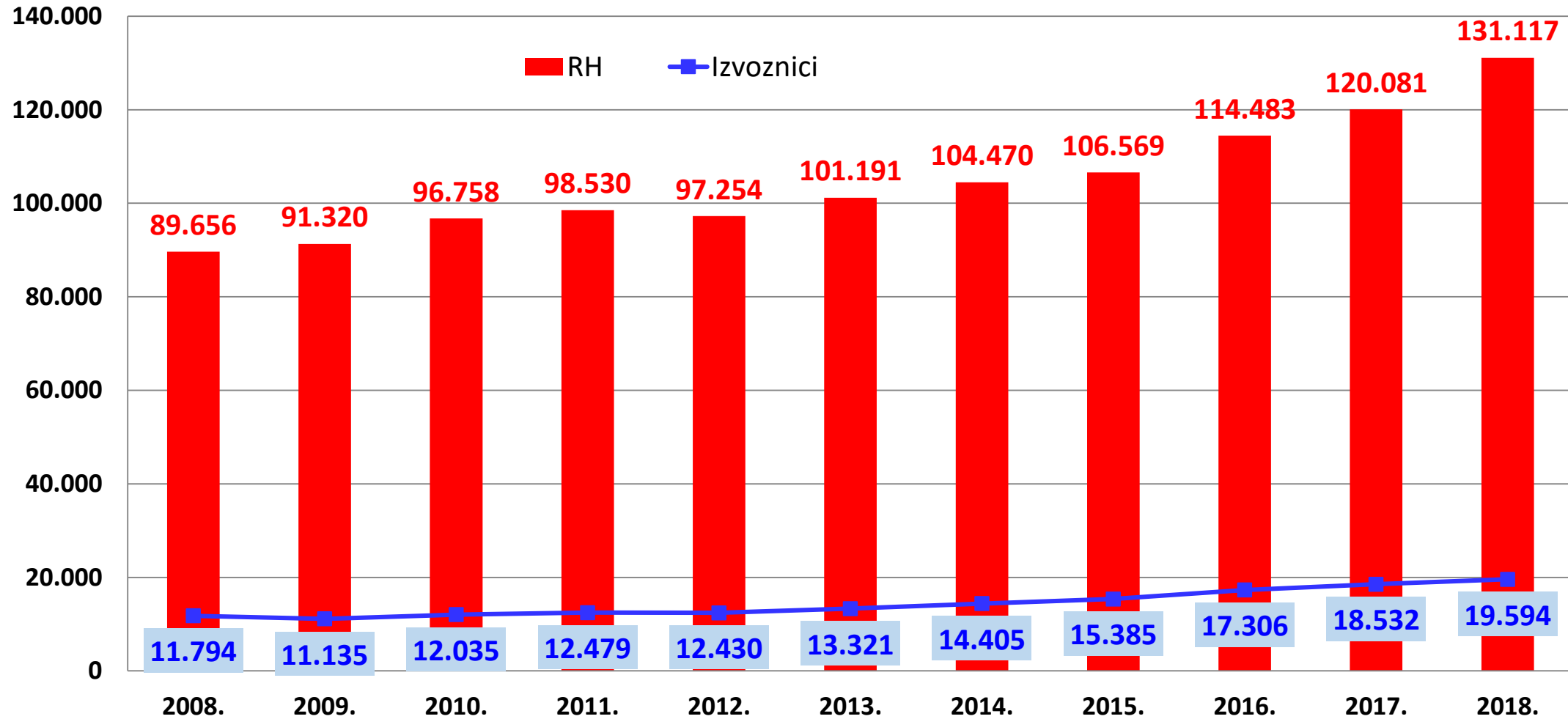
| | 2012. | 2013. | 2014. | 2015. | 2016. | 2017. | 2018. | Indeks 2018/2012 |
|--------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|---------------------|
| Izvoz kuna (mlrd) | 72.380 | 72.595 | 79.099 | 87.772 | 92.763 | 104.601 | 107.913 | 149,1 |
| Vrijednosti u EUR (mlrd) | 9.629 | 9.589 | 10.369 | 11.528 | 12.317 | 13.983 | 14.543 | 151,0 |
| EUR/tone | 726,7 | 650,9 | 682,6 | 712,9 | 719,8 | 783,2 | 827,3 | 113,8 |
| | | | | | | | | |
| Uvoz kuna (mlrd) | 121.899 | 125.052 | 130.673 | 140.748 | 148.475 | 163.313 | 176.216 | 144,6 |
| Vrijednosti u EUR (mlrd) | 16.214 | 16.528 | 17.129 | 18.482 | 19.712 | 21.808 | 23.748 | 146,5 |
| EUR/tone | 1.050,8 | 1.049,3 | 1.121,0 | 1.091,8 | 1.077,5 | 1.152,6 | 1.197,9 | 114,0 |
| | | | | | | | | |
| av. EUR-o/kune | 7,51 | 7,57 | 7,63 | 7,61 | 7,53 | 7,46 | 7,41 | 98,7 |

Izvoz i uvoz roba i usluga Hrvatske i zemalja usporedivih značajki, kao % nacionalnog BDP-a

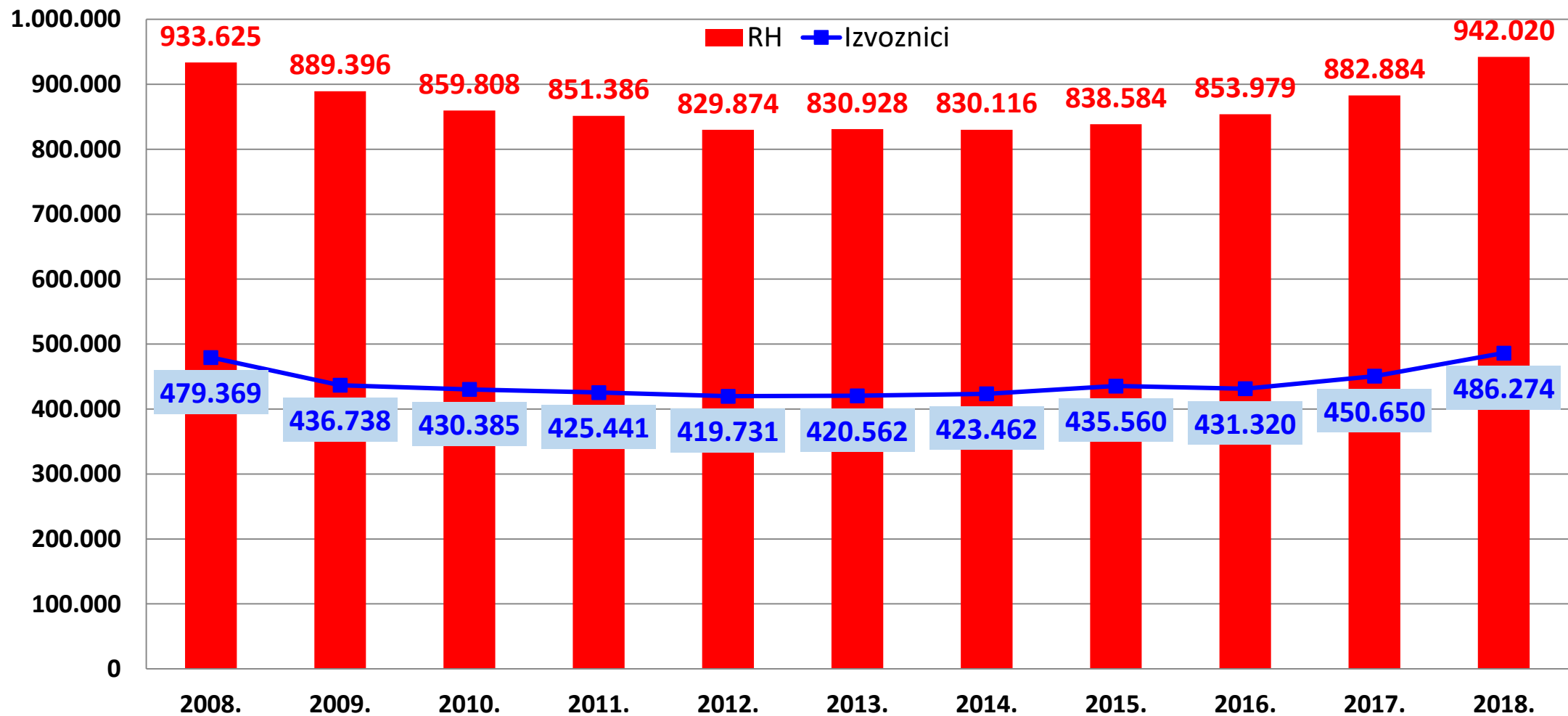
2018.



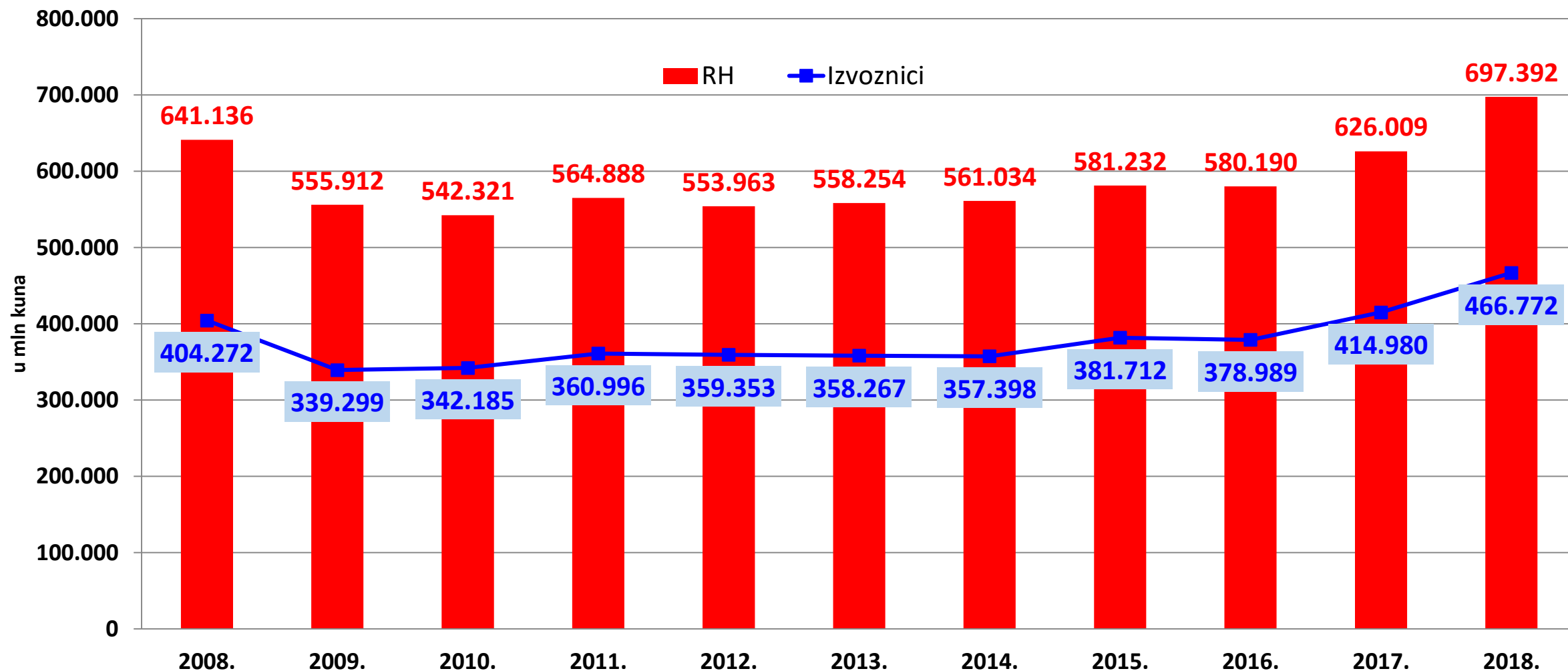
Broj poduzeća ukupno RH/Izvoznici



Broj zaposlenih ukupno RH/Izvoznici

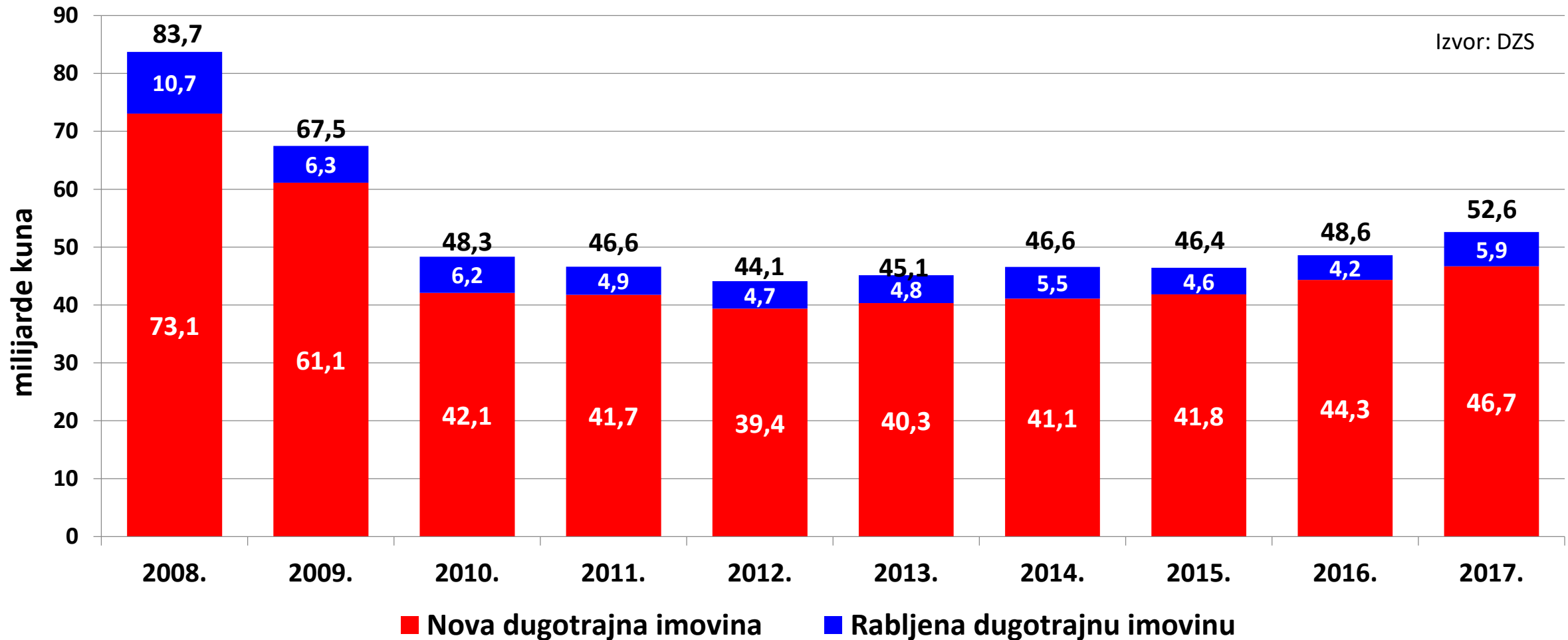


Prihodi od prodaje proizvoda i usluga RH/Izvoznici



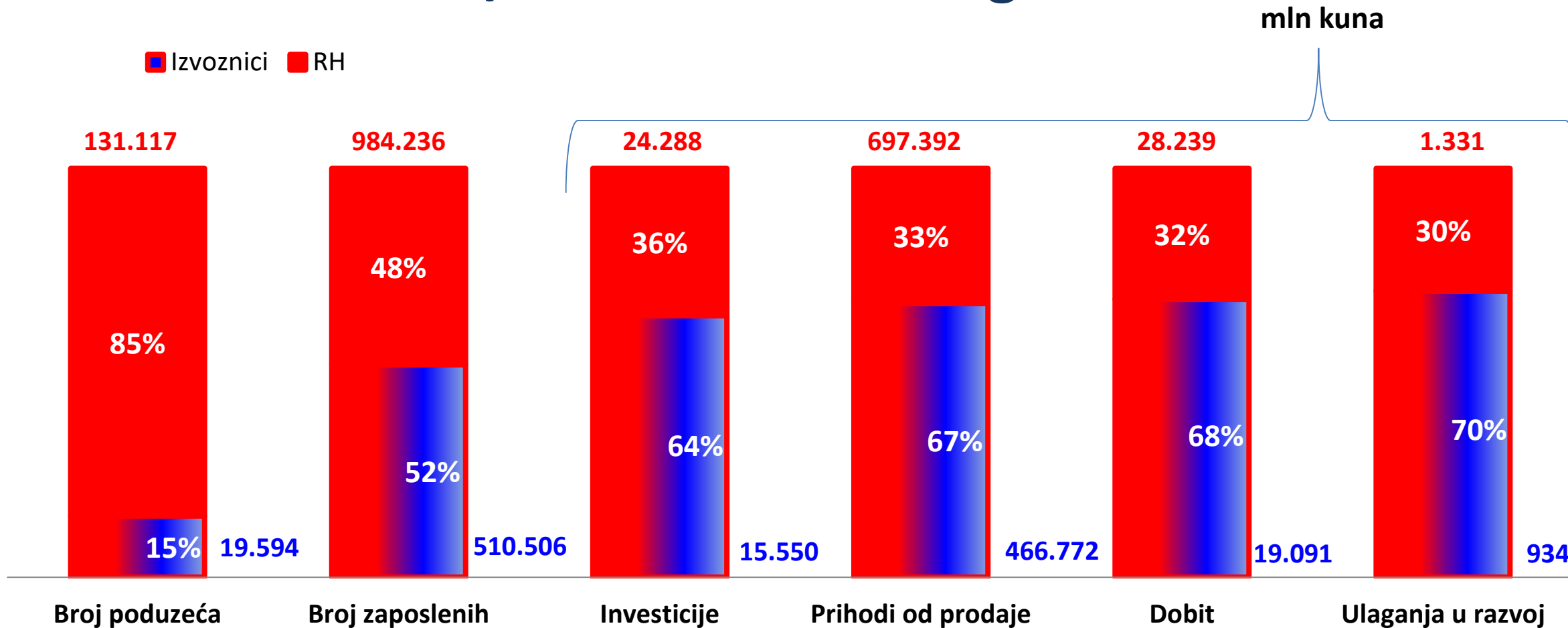
Bruto investicije u **novu** i **rabljenu** dugotrajnu imovinu

(milijarde kuna)

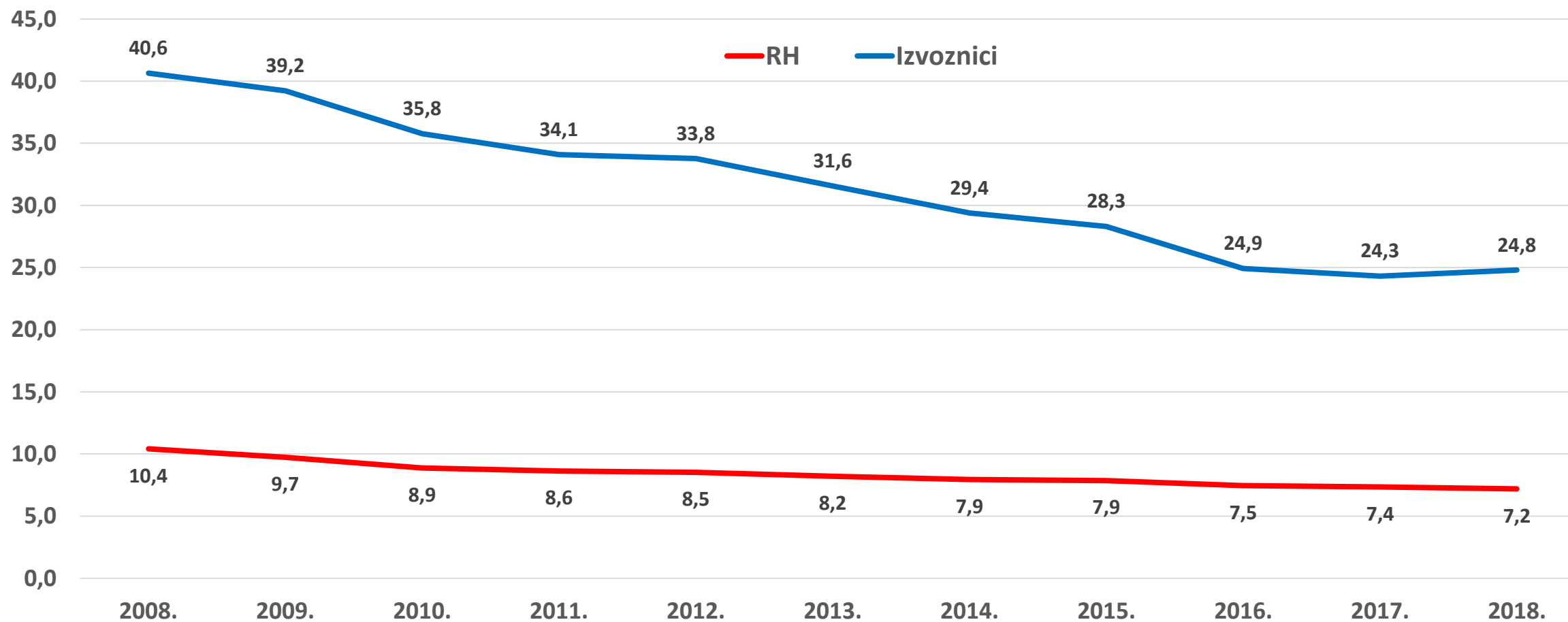


Sažetak

RH/Izvoznici za 2018. godinu



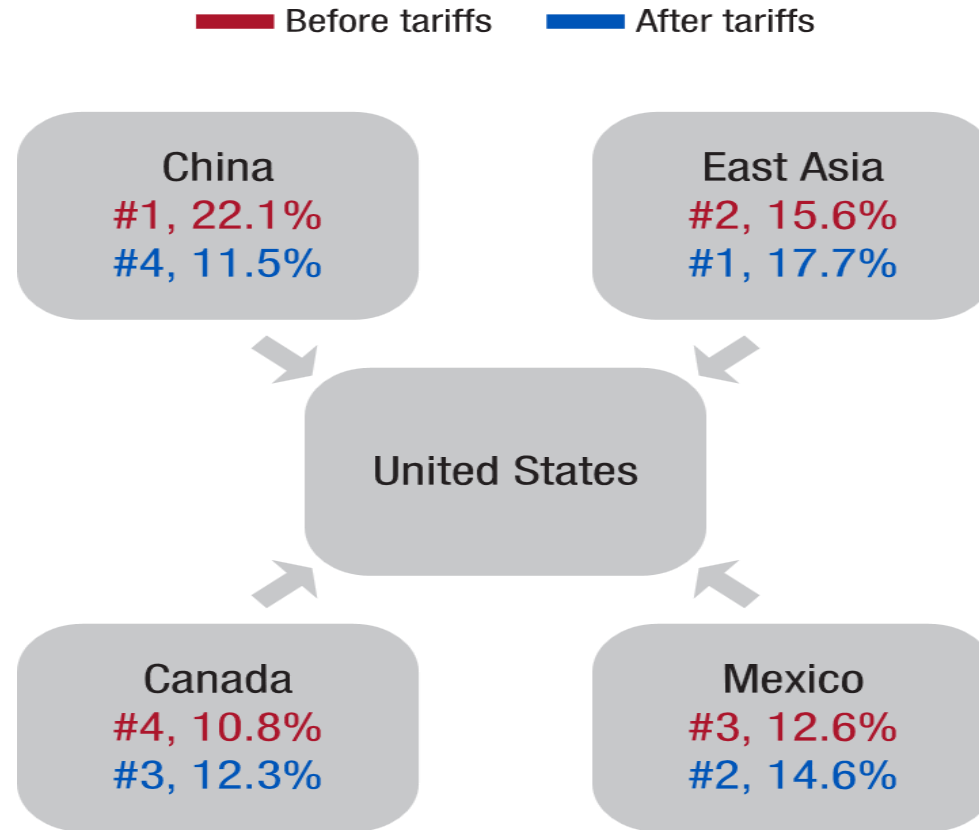
Broj zaposlenih po poduzeću



Samo neka od obilježja svijeta u kojem hrvatski izvoznici posluju

- Slabljenje gospodarske pozicije SAD-a i zemalja EU
- Jačanje gospodarske snage G20
- Smanjivanje utjecaja banaka i rast utjecaja fondova na gospodarstvo svijeta
- Jačanje političkih napetosti između SAD-a – Rusije – Kine
- Nestabilnosti cijelih regija
- **Snažno jača ideja protekcijonizma**
- **Jača ideja državnog intervencionizma i reprivatizacije**
- **Digitalizacija osigurava revolucionarne promjene u gospodarstvu ali i u društvu u cjelini**

Uvoz elektronike i strojeva prije i poslije tarifa - SAD



Sources: Caliendo and others (2017) model; and IMF staff calculations.

Note: #x means rank, xx% means share in total US imports of electronics.

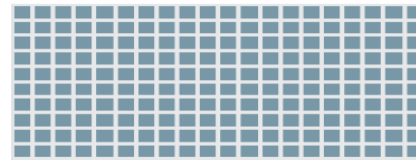
Očekuje se da će rast električnih vozila smanjiti trgovinu auto-dijelovima i naftom

■ Traditional/gasoline cars
■ Electric vehicles (EVs)

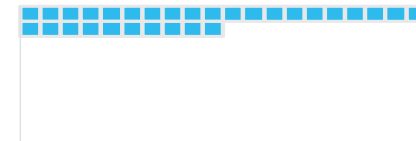
Reduction in vehicle parts trade

Moving parts of

a traditional powertrain

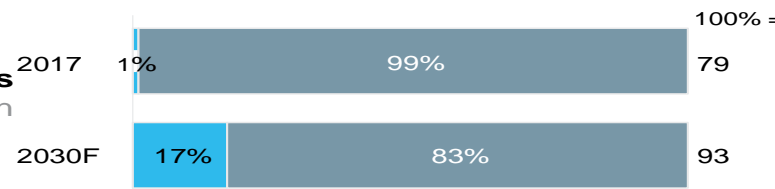


Moving parts of an EV powertrain



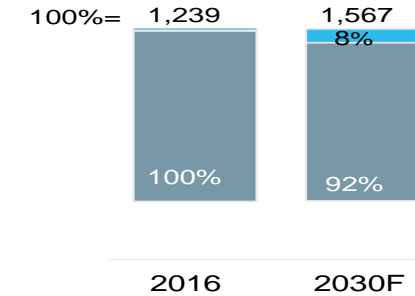
Total global car sales

%; million



Total global car parc¹

%; million cars



Estimated trade effects by 2030

Up to **\$69B** annual reduction in oil trade

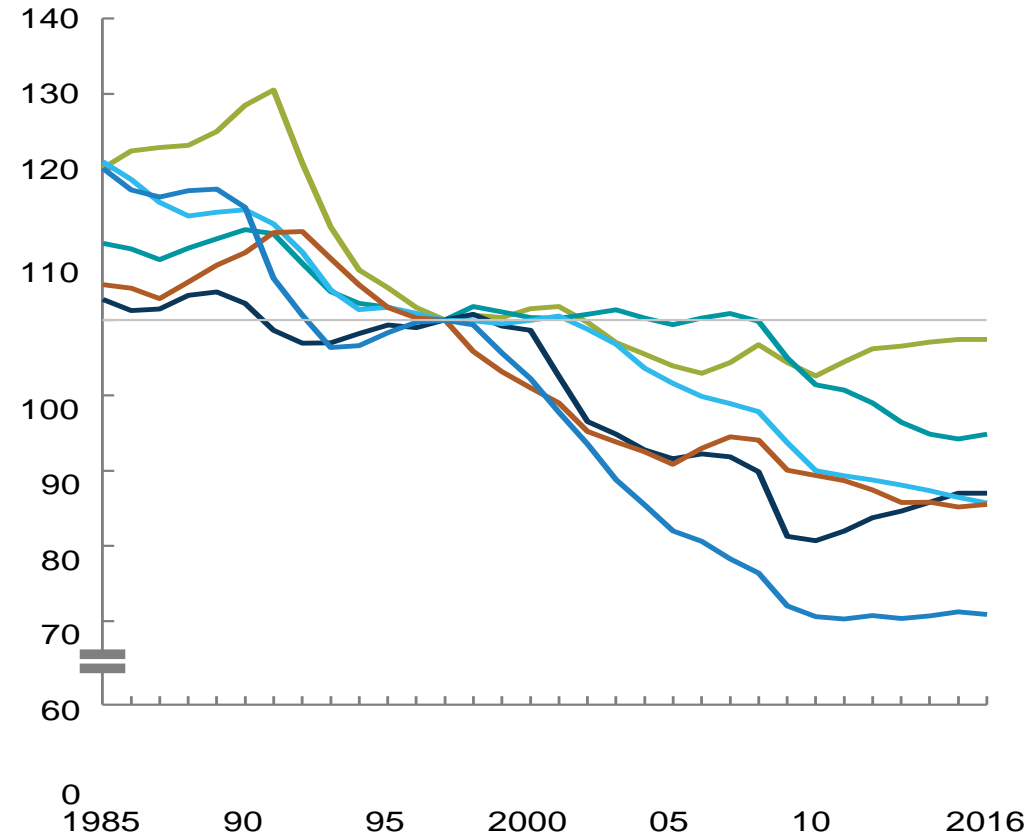
~10% reduction in vehicle parts trade



¹ Refers to the total of all registered cars on the road. NOTE: Figures may not sum to 100% because of rounding.

Većina razvijenih gospodarstava izgubila je proizvodna radna mjesta od 1990-ih.

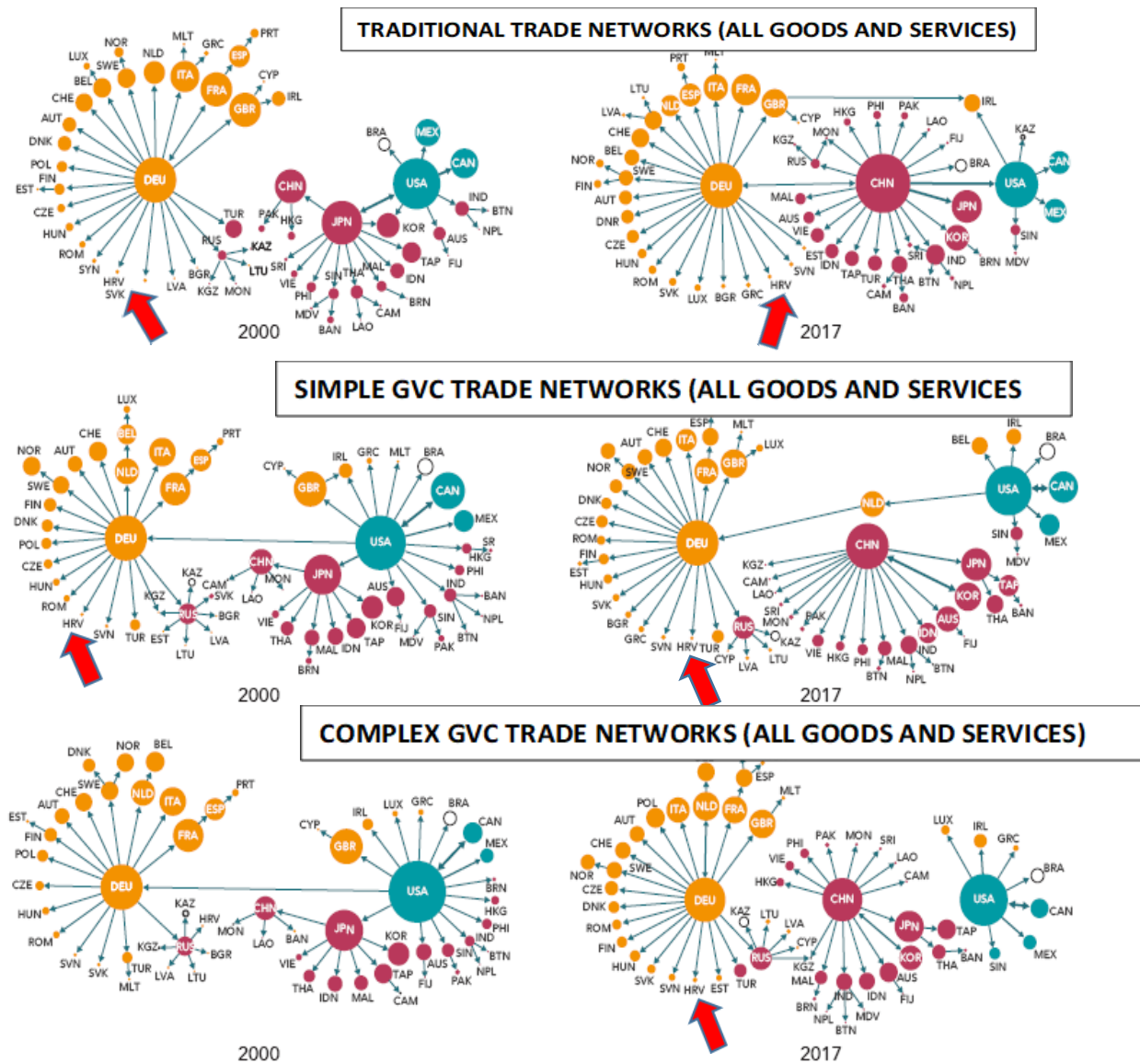
Manufacturing employment
Index: 100 = 1997



| | Manufacturing employment | % of manufacturing over total economy 2016 | |
|----------------|--------------------------|--|------------|
| | % change since 1997 | Value added | Employment |
| Germany | -3 | 20 | 19 |
| Italy | -15 | 15 | 19 |
| United States | -23 | 12 | 9 |
| France | -24 | 10 | 10 |
| Japan | -25 | 18 | 17 |
| United Kingdom | -39 | 9 | 9 |

SOURCE: The Conference Board, OECD; International Labor Comparisons program, May 2017; McKinsey Global Institute analysis

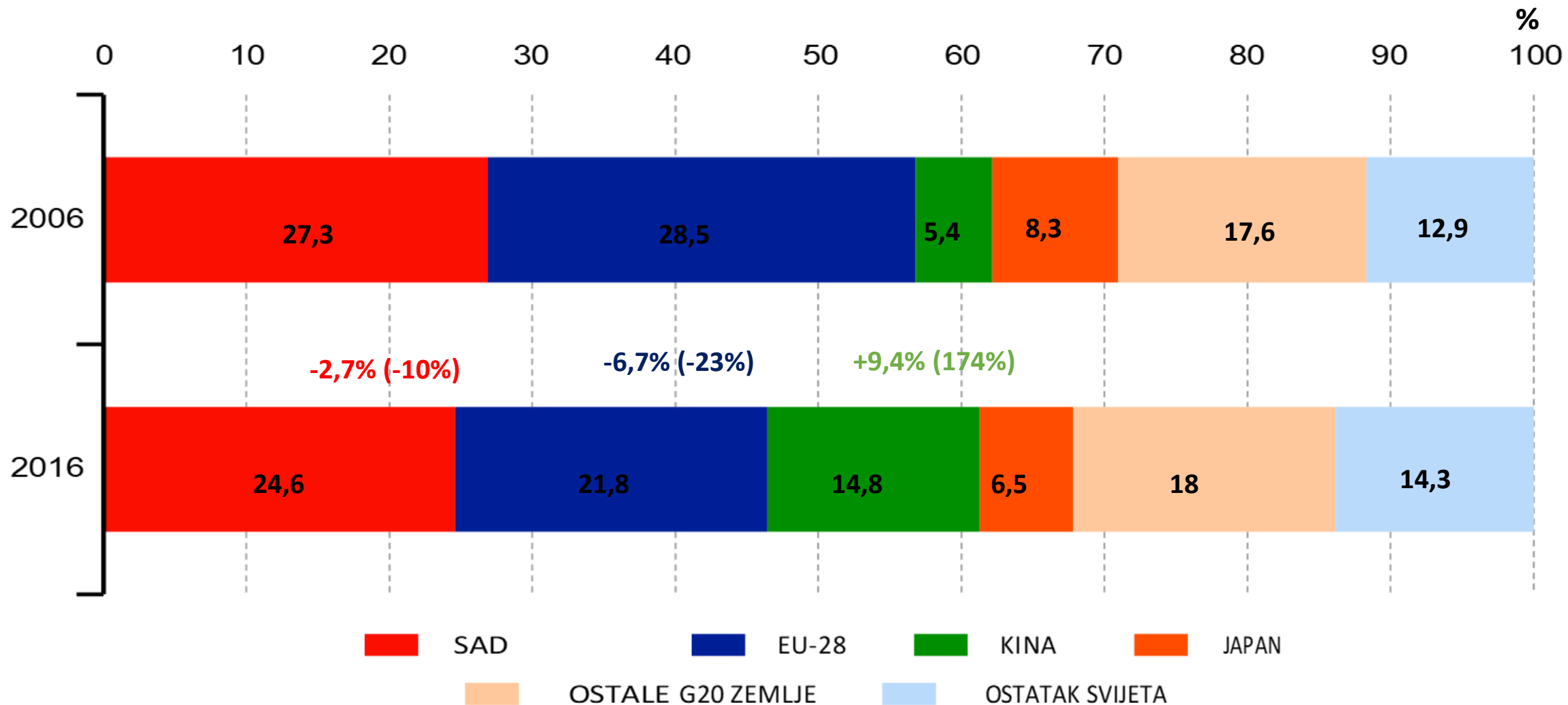
FIGURE 1.15 Supply hubs of trade in value-added in various networks at the aggregate level



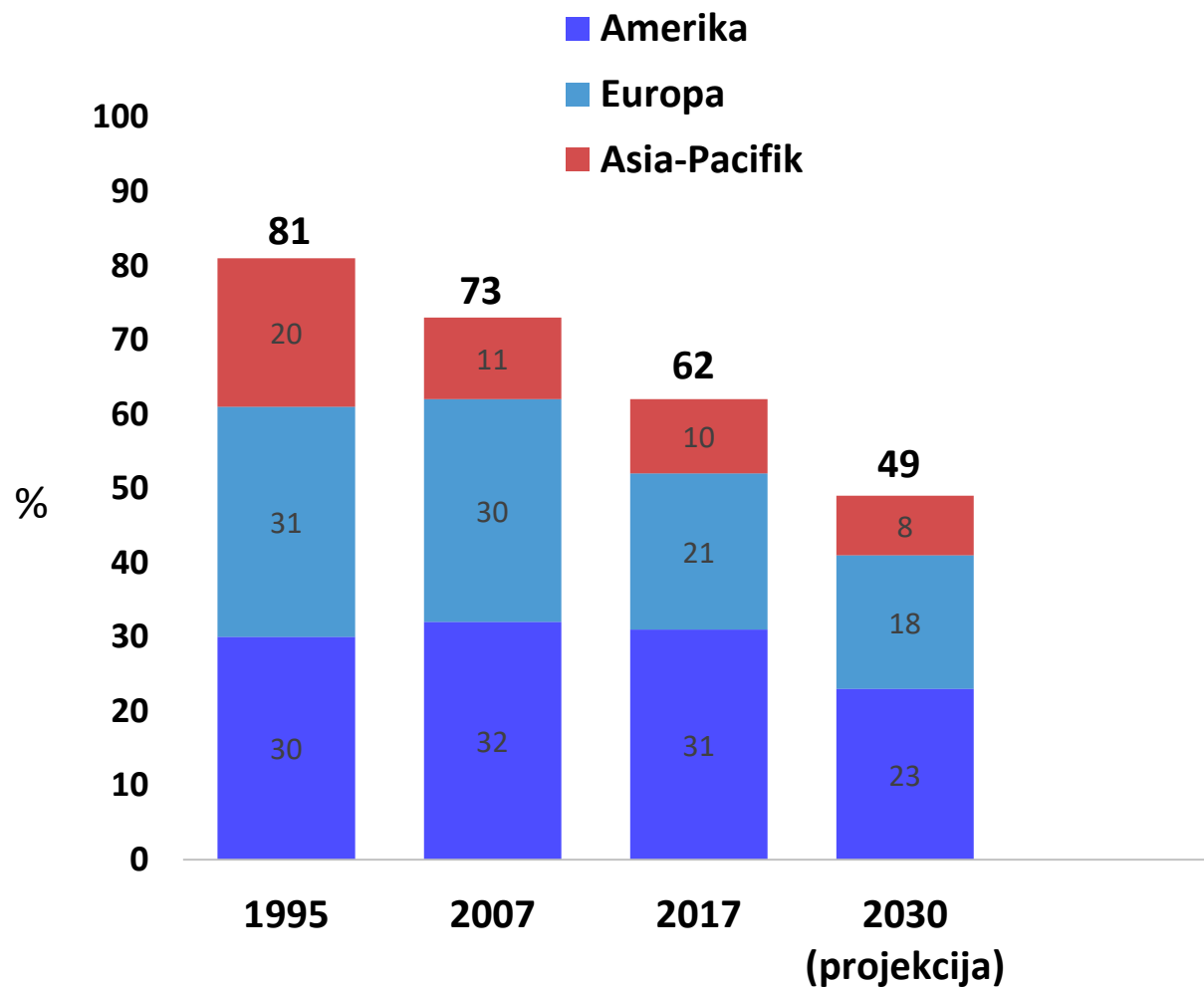
Note: the size of the circles represents the magnitude of value-added exports. The volume of value-added flow between each pair of trading partners is represented by the thickness of the line linking the two.

Source: Meng et al. (2018) based on the UIBE GVC indexes derived from the ADB 2018 ICIO table.

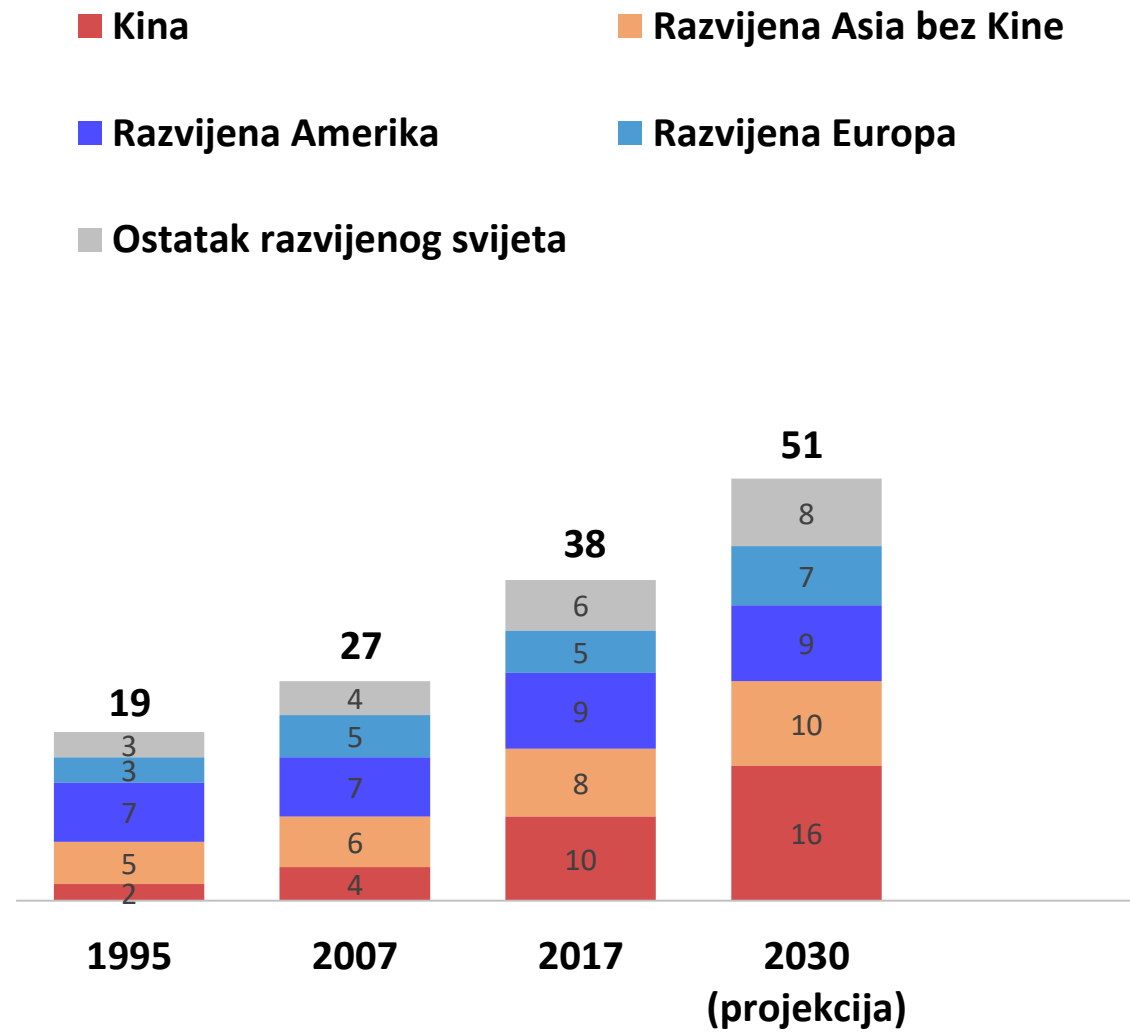
Udio u svjetskom BDP-u 2006. godine i 2016. godine



Udio razvijenih gospodarstava u globalnoj potrošnji po regijama



Udio ekonomija u razvoju u globalnoj potrošnji po regijama



Državna zabrana preuzimanja poduzeća od strane stranih konkurenata mora se i u budućnosti temeljiti na strogim uvjetima, a isto je moguće samo ako je neophodno kao obrana od rizika za nacionalnu sigurnost uključujući i područje ključne infrastrukture.

„The state prohibition of company takeovers by foreign competitors must be based on strict requirements in future too and may only happen if this is necessary to defend against risks to national security, including the area of critical infrastructures.”

Kada se pokušaji preuzimanja fokusiraju na tehnologiju i inovacijsko vodstvo, a ne na praćenje državnog interesa na području sigurnosti, prvenstveno je zadatak njemačkog privatnog sektora i njegovih dionika da spriječe takva preuzimanja odgovarajućim ponudama. U tim slučajevima, država može ponuditi ohrabrenje i podršku.

„Where takeover attempts concern technology and innovation leadership rather than primarily following the state interest in security, it is above all a matter for the private German sector and its stakeholders to prevent such takeovers by suitable bids. In these cases, the state can provide encouragement and support.”

Samo u izuzetno važnim slučajevima država može biti kupac dionica i samo tijekom ograničenog razdoblja. Sve u svemu, udio države se dugoročno ne smije povećati, zbog čega se razmatra uspostava nacionalne ustanove za sudjelovanja čiji je zadatak redovito izvještavati parlament o opsegu novog učešća. U načelu, preuzimanje novih udjela mora biti uravnoteženo privatizacijom drugih.

„Only in very important cases should the state be able to act as buyer of shares for a restricted period of time. All in all, the stake held by the state may not increase in the long term, however, which is why the creation of a national participation facility comes into consideration with the requirement of reporting to parliament on a regular basis about the extent of any participation.

Taking-over of new stakes must in principle be balanced by the privatisation of others.”

**Više nije pitanje kako osigurati snažniji rast hrvatskog izvoza roba i usluga
s većom novostvorenom vrijednošću**

već

Kako preživjeti sve ove promjene

**Ovi primjeri služe kao
uvod u panel koji slijedi
nakon stanke**

HVALA NA POZORNOSTI