CONCEX e COMBASE

Atualização da tarifação da madeira brasileira nos EUA

PORTO ALEGRE, 04 DE ABRIL DE 2025



- Estados Unidos é o principal destino das exportações de madeira brasileira (US\$ 1,58 bi | 43%) e da madeira gaúcha (US\$ 108 milhões | 31%)
- O Rio Grande do Sul é o 3º principal estado (7%) que mais exporta madeira para os EUA, atrás apenas de Santa Catarina (US\$ 651 milhões | 41%) e Paraná (US\$ 614 milhões | 39%)
- As exportações de madeira para os EUA são bastante concentradas, sendo 82% de madeira serrada e 11% de madeira perfilada
- O Brasil é o 3º principal fornecedor de madeira dos EUA, representando 6,8% das importações norte-americanas de madeira (2023)
- Quanto ao mercado americano, as importações de madeira perfilada do Brasil representam 30% das importações americanas, seguidas de obras de carpintaria (9%), madeira compensada (10%) e madeira serrada (3%) (2023)
- A tarifa média aplicada às importações de madeira brasileira nos EUA é de 0,6%
- Em 2022, 58,3% da receita da indústria madeireira do Brasil veio do mercado externo

RELAÇÃO

COMERCIAL





OS MECANISMOS QUE AFETAM A MADEIRA:

- Seção 232
- Reciprocidade Tarifária anunciada em 02 de abril



SECAO 232 PRINCIPAIS PONTOS

- A Seção 232 do Ato de Expansão do Comércio dos Estados Unidos de 1962 permite que o país restrinja importações para proteger a segurança nacional.
- Presidente Trump impôs tarifas ad valorem de 25% sobre artigos de aço e alumínio para todos os os países a partir de 12 março de 2025
- Abertura de investigação para a madeira em 01/03/25: "A indústria de produtos de madeira, composta de madeira serrada e derivados (como produtos de papel, móveis e armários) é uma indústria de manufatura crítica essencial para a segurança nacional, força econômica e resiliência industrial dos Estados Unidos. Esta indústria desempenha um papel vital nas principais indústrias civis, incluindo a construção" (Nota da Casa Branca).
- ✓ Prazo da investigação: até 270 dias
- Objetivo: tarifa de 25%



STATUS INVESTIGAÇÃO

- Articulação ABIMCI 4 frentes de trabalho Madeira Serrada, Madeira Compensada, Molduras e Portas Contratação escritório advocacia norte-americano
- Prazo 01 de abril: Consulta Pública objetivo: levantar comentários, dados, análises das partes interessadas. Manifestação ABIMCI, MRE, CNI e partes interessadas nos EUA
- Articulação com Secretaria de Comércio Exterior/MDIC Correspondência e reunião promovida pelos presidentes das 3 Federações do Sul do Brasil
- Articulação com Confederação Nacional da Indústria/CNI



Principais Decisões 02 de abril

- Definição de uma política de tarifas recíprocas
- Estabelecimento de um Imposto ad valorem adicional sobre todas as importações de todos os parceiros comerciais inicial de 10% a partir de 05 de abril de 2025
- Países listados no anexo I estarão sujeitos à taxas de imposto ad valorem específicas a partir de 9 de abril de 2025
- Novas tarifas de 25% para automóveis e autopeças não fabricados nos EUA
- Brasil terá tarifa adicional de 10% para todos os produtos



EXCEÇÕES

(b) Os seguintes produtos, conforme estabelecido no Anexo II desta ordem, de acordo com a lei, não estarão sujeitos às taxas de imposto ad valorem sob esta ordem: (i) todos os artigos abrangidos por 50 USC 1702(b); (ii) todos os artigos e derivados de aço e alumínio sujeitos aos impostos de acordo com a seção 232 da Lei de Expansão Comercial de 1962 e proclamados na Proclamação 9704 de 8 de março de 2018(...); (iii) todos os automóveis e peças automotivas sujeitos aos impostos adicionais impostos de acordo com a seção 232 da Lei de Expansão Comercial de 1962, conforme alterada, e proclamada na Proclamação 10908 de 26 de março de 2025 (Ajuste de Importações de Automóveis e Peças de Automóveis para os Estados Unidos); (iv) outros produtos enumerados no Anexo II desta ordem, incluindo cobre, produtos farmacêuticos, semicondutores, artigos de madeira, certos minerais essenciais e energia e produtos energéticos; (v) todos os artigos de um parceiro comercial sujeitos às taxas estabelecidas na Coluna 2 da Tabela Tarifária Harmonizada dos Estados Unidos (HTSUS); e (vi) todos os artigos que podem se tornar sujeitos a impostos de acordo com ações futuras sob a seção 232 da Lei de Expansão Comercial de 1962.



HTS US (CAPÍTULO 44)

44011100	Coniferous fuel wood, in logs, in billets, in twigs, in faggots or similar forms
44011200	Nonconiferous fuel wood, in logs, in billets, in twigs, in faggots or similar forms
44012100	Coniferous wood in chips or particles
44012200	Nonconiferous wood in chips or particles
44013100	Sawdust and wood waste and scrap, pellets
44013200	Wood briquettes
	Sawdust and wood waste and scrap, agglomerated, excluding wood pellets, wood
44013942	briquettes and artificial fire logs
44014100	Sawdust, not agglomerated
44014900	Other wood waste and scrap, not agglomerated, other than sawdust
44021000	Wood charcoal (including shell or nut charcoal), whether or not agglomerated, of
	bamboo
	Wood charcoal (including shell or nut charcoal), whether or not agglomerated, of
44022000	shell or nut
	Wood charcoal (including shell or nut charcoal), whether or not agglomerated, other
44029001	than of bamboo or shell or nut
	Coniferous wood in the rough whether or not stripped of bark or sapwood, or
44031100	roughly squared, treated with preservatives
44034300	Nonconiferous wood in the rough whether or not stripped of bark or sapwood, or
44031200	roughly squared, treated with preservatives Pine wood in the rough/roughly squared, the smallest dimension greater than or
44032101	equal to 15 cm, not treated with preservatives
44032101	Pine wood in the rough/roughly squared, the smallest dimension less than 15 cm,
44032201	not treated with preservatives
11032201	Fir and spruce wood in the rough/roughly squared, the smallest dimension greater
44032301	than or equal to 15 cm, not treated with preservatives
	, , , , , , , , , , , , , , , , , , , ,
	Fir and spruce wood in the rough/roughly squared, the smallest dimension less than
44032401	15 cm, not treated with preservatives
	Other coniferous wood, except pine, fir and spruce, in the rough/roughly squared,
44032501	greater than or equal to 15 cm, not treated with preservatives
44032601	Other coniferous wood, except pine, fir and spruce, in the rough/roughly squared,
44032001	less than 15 cm, not treated with preservatives Wood in the rough/roughly squared, of teak, not treated with
44034200	paint/stain/creosote/other preserv
44054200	Wood in the rough/roughly squared, of tropical wood other than Teak or Meranti,
44034902	not treated with paint/stain/creosote/other preserv
44020400	Oak wood in the rough, whether or not stripped of bark or sapwood, or roughly
44039100	Oak wood in the rough, whether or not stripped of bark or sapwood, or roughly squared, not treated with preservatives
44039100	Oak wood in the rough, whether or not stripped of bark or sapwood, or roughly squared, not treated with preservatives Beech wood in the rough/roughly squared, the smallest dimension greater than or
44039100	squared, not treated with preservatives
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14071100	Pine wood sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
44071200	Fir and spruce wood sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
	Mixtures of spruce, pine and fir (S-P-F) wood sawn or chipped lengthwise, sliced or
44071300	peeled, over 6 mm thick
	Mixtures of hemlock and fir (hem-fir) wood sawn or chipped lengthwise, sliced or
44071400	peeled, over 6 mm thick
44071900	Other coniferous wood, nesoi, sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
	Dark Red Meranti, Light Red Meranti and other specified tropical woods, sawn or
44072100	chipped lengthwise, sliced or peeled, over 6 mm thick
44072100	Okoume, Obeche, Sapelli and other specified tropical woods, sawn or chipped
44072200	lengthwise, sliced or peeled, over 6 mm thick
44072301	Teak, sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
44072301	Dark Red Meranti, Light Red Meranti and Meranti Bakau wood sawn or chipped
44072500	lengthwise, sliced or peeled, over 6 mm thick
44072300	White Lauan, White Meranti, White Seraya, Yellow Meranta and Alan wood sawn or
44072600	chipped lengthwise, sliced or peeled, over 6 mm thick
44072700	Sapelli wood sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
44072800	Iroko wood sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
44072902	Tropical wood, nesoi, sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
44079100	Oak wood, sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
44079200	Beech wood, sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
44079300	Maple wood sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
44079400	
	Cherry wood sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
44079500	Ash wood sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
44079600	Birch wood, sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
44079700	Poplar and aspen wood, sawn or chipped lengthwise, sliced or peeled, over 6 mm thick
44075700	Nonconiferous wood, nesoi, sawn or chipped lengthwise, sliced or peeled, over 6
44079902	mm thick
	Coniferous veneer sheets and sheets for plywood & coniferous wood
44081001	sawn/sliced/peeled not over 6 mm thick
	Dark Red Meranti, Light Red Meranti and Meranti Bakau veneer sheets and sheets
44083101	for plywood and other wood sawn/sliced/peeled, n/o 6 mm thick
	Other tropical wood veneer sheets and sheets for plywood, and wood
44083902	sawn/sliced/peeled n/o 6 mm thick
44000004	Nontropical nonconiferous veneer sheets and sheets for plywood and other wood
44089001	sawn/sliced/peeled, not over 6 mm thick
	Coniferous wood continuously shaped along any of its ends, whether or not also
44091005	continuously shaped along any its edges or faces
. 1001003	Coniferous wood siding continuously shaped along any of its edges or faces but not
44091010	on its ends
	Coniferous wood flooring continuously shaped along any of its edges or faces but no
44091020	on its ends
	Standard wood moldings of pine (Pinus spp.) continuously shaped along any of its
44091040	edges or faces but not on its ends
44004045	Standard coniferous wood moldings, other than of pine, continuously shaped along
44091045	any of its edges or faces but not on its ends
44091050	Coniferous wood moldings, other than standard type, continuously shaped along and of its edges or faces but not on its ends
44031030	Coniferous wood dowel rods, plain, continuously shaped along any of its edges or
44091060	faces but not on its ends
	Coniferous wood dowel rod, sanded/grooved/otherwise advanced in condition,
44091065	continuously shaped along any of edges or faces but not its ends
	Coniferous wood, other than siding, flooring, moldings or dowel rod, continuously
44091090	shaped along any of its edges or faces but not on its ends

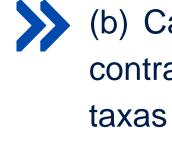
44092105	Nonconiferous wood (bamboo) continuously shaped along any of its ends, wether or not also continuously shaped along any its edges or faces
44092190	Bamboo, other than continuously shaped along any of its ends
44092205	Nonconiferous tropical wood continuously shaped along any ends, whether or not also continuously shaped along any edges or faces
41032203	Nonconiferous tropical wood siding, whether or not continuously shaped along its
44092210	edges or faces but not its ends
44092225	Nonconiferous tropical wood flooring, whether or not continuously shaped along its edges or faces but not its ends
	Nonconiferous tropical wood standard moldings, whether or not continuously
44092240	shaped along its edges or faces but not its ends
44092250	Other nonconiferous tropical wood moldings, whether or not continuously shaped along its edges or faces but not its ends
44092260	Plain nonconiferous tropical wood dowel rods, whether or not continuously shaped along its edges or faces but not its ends
44092265	Nonconif. tropical wood dowel rods, sanded/grooved/otherwise advanced in condition, whether or not continuous. along edges or faces but not ends
11032203	Other nonconiferous tropical wood, whether or not continuously shaped along its
44092290	edges or faces but not its ends
	Other nonconiferous wood, continuously shaped along any ends, whether or not
44092906	also continuously shaped along any edges or faces
44092911	Other nonconiferous wood siding, whether or not continuously shaped along its
44032311	edges or faces but not its ends Other nonconiferous wood flooring, whether or not continuously shaped along its
44092926	edges or faces but not its ends
	Other nonconiferous standard wood moldings, whether or not continuously shaped
44092941	along its edges or faces but not its ends
44092951	Other nonconiferous wood moldings, whether or not continuously shaped along its edges or faces but not its ends
	Plain other nonconif. wood dowel rods, whether or not continuously shaped along
44092961	edges or faces but not ends
44092966	Other nonconif. wood dowel rods, sanded/grooved/otherwise advanced in condition, whether or not continuously shaped along edges or faces but not ends
41032300	Other nonconiferous wood, whether or not continuously shaped along its edges or
44092991	faces but not its ends
44101100	Waferboard, including oriented strand board, of wood
44101200	Oriented strand board and waferboard, of wood, unworked or not further worked than sanded
44101900	Particle board and similar board of wood, other than waferboard
44109000	Particle board and similar board of ligneous materials other than wood
44111210	MDF , <= 5mm thick, not mechanically worked or surface covered
44111220	MDF, <= 5mm thick, for construction, laminated
44111230	MDF , <= 5mm thick, for construction, not laminated, nesoi
	Fiberboard of a density over 0.5 g/cm3 but not over 0.8 g/cm3, not mechanically
44111260	worked surface covered (Except for oil treatment)
44111290	MDF, <= 5mm thick, not for construction, nesoi
44111310	MDF, >5mm but <= 9 mm thick, not mechanically worked or surface covered
44111320	MDF, >5mm but <= 9 mm thick,, for construction, laminated
44111330	MDF , >5mm but <= 9 mm thick, for construction, not laminated, nesoi
	Fiberboard of a density over 0.5 g/cm3 but not over 0.8 g/cm3, not mechanically
44111360	worked surface covered(except for oil treatment)
44111390	MDF, >5mm but <= 9 mm thick, not for construction, nesoi
	Fiberboard of a thickness exceeding 9 mm, not mechanically worked or surface
44111410	covered Fiberhaard of a thickness exceeding 0 mm, addayyarked continuously, laminated, for
44111420	Fiberboard of a thickness exceeding 9 mm, edgeworked continuously, laminated, for construction uses
44111420	Fiberboard of a thickness exceeding 9 mm , tongued, grooved or rabbetted
44111430	continuously, for construction uses, nesoi
	Fiberboard of a thickness exceeding 9 mm, not mechanically worked surface covered
44111460	(except for oil treatment)

HTS US (CAPÍTULO 44)

44111490	Fiberboard nesoi,of a thickness exceeding 9 mm
44119210	Fiberboard of a density exceeding 0.8 g/cm3, not mechanically worked or surface
	covered
	Fiberboard, of a density exceeding 0.8 g/cm3, mechanically worked, not surface
44119220	covered (except for oil treatment)
	Fiberboard, of a density exceeding 0.8 g/cm3, mechanically edged-worked, for
44119230	construction uses
44119240	Fiberboard nesoi, density exceeding 0.8 g/cm3
44119310	Fiberboard, not MDF, of a density >0.5 but <=0.8 g/cm3, not mechanically worked or
	surface covered
44440330	Fiberboard, not MDF, of a density >0.5 but <=0.8 g/cm3, edgeworked continuously,
44119320	laminated, for construction uses
44110220	Fiberboard, not MDF, of a density >0.5 but <=0.8 g/cm3, tongued, grooved or
44119330	rabbetted continuously, for construction, nesoi
44119360	Fiberboard of a density over 0.5 g/cm3 but not over 0.8 g/cm3, not mechanically worked surface covered (Except for oil)
44119390	Fiberboard, not MDF, of a density >0.5 but <=0.8 g/cm3, nesoi
44110400	Fiberboard of a density exceeding 0.35 g/cm3 but not exceeding 0.5 g/cm3, not
44119400	mechanically worked or surface covered
44121005	Plywood, veneered panels and similar laminated wood, of bamboo
44121090	Veneered panels and similar laminated wood, of bamboo, other than plywood
	Plywood sheets n/o 6mm thick, tropical wood outer ply, birch face ply, not surface
44123106	covered beyond clear/transparent
44422426	Plywood sheets n/o 6mm thick, tropical wood outer ply, Spanish cedar or walnut
44123126	face ply, not surface covered beyond clear/transparent
44123142	Plywood sheets n/o 6mm thick, tropical wood outer ply, with mahogany face ply, not surface covered beyond clear/transparent
44123142	
44123145	Plywood sheets n/o 6mm thick tropical wood outer ply not mahogony face ply not surfact covered beyond clear/transparent of spec. thick, width, length
44123143	Plywood sheets n/o 6mm thick, tropical wood outer ply, not mahogony face ply, not
44123148	surface covered beyond clear/transparent, nesoi
44125140	Plywood sheets n/o 6mm thick, tropical wood nesoi at least one outer ply, with face
44123152	ply nesoi, not surface covered beyond clear/transparent
	Plywood sheets n/o 6mm thick, with certain specified tropical wood outer ply,
44123161	surface covered beyond clear or transparent
	Plywood sheets n/o 6mm thick, tropical wood nesoi at least one outer ply, surface
44123192	covered beyond clear or transparent
	Plywood sheets n/o 6mm thick, birch face ply, not surface covered beyond
44123306	clear/transparent
	Plywood sheets n/o 6mm thick, walnut face ply, not surface covered beyond
44123326	clear/transparent
	Plywood sheets n/o 6mm thick, outerply of specified nonconiferous wood excluding
44123332	walnut and birch, not surface covered beyond clear/transparent
	Plywood sheets n/o 6mm thick, outerply of specified nonconiferous wood including
44123357	birch and walnut, surface covered beyond clear/transparent
	Plywood sheets n/o 6mm thick, outerply of nonconiferous wood not in 4412.33,
44123426	spanish cedar face ply, not surface covered beyond clear/transparent
****	Plywood sheets n/o 6mm thick, outerply of nonconiferous wood not in 4412.33, face
44123432	ply nesoi, not surface covered beyond clear/transparent
44122457	Plywood sheets n/o 6mm thick, outerply of nonconiferous wood not in 4412.33, face
44123457	ply nesoi, surface covered beyond clear/transparent
44122010	Plywood of wood sheets, n/o 6 mm thick each, with outer plies of coniferous wood,
44123910	face ply of Parana pine, not or clear surface covered
44122020	Plywood of wood sheets, n/o 6 mm thick each, with outer plies of coniferous wood,
44123930	European red pine face ply, not or clear surface covered

	Plywood of wood sheets, n/o 6 mm thick each, with outer plies of coniferous wood,
44123940	with face ply nesoi, not or clear surface covered
	Plywood of wood sheets, n/o 6 mm thick each, with outer plies of coniferous wood,
44123950	nesoi, surface covered, nesoi
44124100	Laminated veneered lumber with at least one outer ply of tropical wood
44124200	Laminated veneered lumber with at least one outer ply of nonconiferous wood
44124900	Laminated veneered lumber with both outer plies of coniferous wood
	Blockboard etc: plywood nesoi, at least one tropical outer ply, not surface-covered
44125110	beyond clear/transparent, w/face ply of birch
	Blockboard etc: plywood nesoi, at least one tropical outer ply, not surface-covered
44125131	beyond clear/transparent, not w/face ply of birch
	Blockboard etc: plywood nesoi, at least one tropical outer ply, surface covered other
44125141	than clear or transparent
44125151	Blockboard etc: other than plywood nesoi, at least one tropical outer ply
	Blockboard etc: plywood nesoi, at least one nonconiferous outer ply, not surface-
44125210	covered beyond clear/transparent, w/face ply of birch
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	Blockboard etc: plywood nesoi, at least one nonconiferous outer ply, not surface-
44125231	covered beyond clear/transparent, not w/face ply of birch
	Blockboard etc: plywood nesoi, at least one nonconiferous outer ply, surface
44125241	covered other than clear or transparent
44125251	Blockboard etc: other than plywood nesoi, at least one nonconiferous outer ply
	Blockboard etc: plywood nesoi, at least one conif. outer ply, not surface-covered
44125980	beyond transparent, not w/face ply of Europe red pine or Parana pine
	Blockboard etc: plywood nesoi, at least one coniferous outer ply, surface covered
44125990	other than clear or transparent
44125995	Blockboard etc: other than plywood nesoi, at least one coniferous outer ply
	Not blockboard: plywood/veneered panel/sim. w/at least one outer ply of tropical
44129106	wood containing at least one layer of particle board
	Not blockboard: plywood w/at least one outer play of tropical wood, no particle
44129110	board, not surface-covered beyond clear/transparent, w/face ply birch
	Not blockboard: plywood w/at least one outer play of tropical wood, no particle
44129131	board, not surface-covered beyond transparent, not w/face ply of birch
	Not blockboard: plywood w/at least one outer ply of tropical, surface covered other
44129141	than clear or transparent
	Not blockboard: veneered panels and similar laminated wood w/ at least one
44129151	tropical outer ply, nesoi
	Not blockboard: plywood/veneered panel/sim. w/at least one nonconiferous outer
44129207	ply, at least one layer of particle board
	Not blockboard: plywood w/at least one outer ply of nonconif wood, no particle
44129211	board, not surface-covered beyond clear/transparent, w/face ply birch

	Not blockboard: plywood w/at least one outer play of nonconif wood, no particle
44129231	board, not surface-covered beyond transparent, not w/face ply of birch
	Not blockboard: plywood w/at least one outer ply of nonconiferous, surface covered
44129242	other than clear or transparent
	Not blockboard: veneered panels and similar laminated wood, not plywood, w/ at
44129252	least one nonconiferous outer ply, nesoi
	Not blockboard: plywood/veneered panel/sim. w/both outer plies of coniferous,
44129958	containing at least one layer of particle board
	Not blockboard: plywood w/both outer plies of conif, no particle board, not surf
44129961	cov. beyond clear/transp., face ply Parana pine
	Not blockboard: plywood w/ both outer plies of conif, no particle board, not surf
44129971	cov. beyond clear/transp., face ply Europe red pine
	Not blockboard: plywood w/ both outer plies of conif, no particle board, not surf-
44129981	cov. beyond clear/transparent, face ply nesoi
	Not blockboard: plywood w/ both outer plies of conif, no particle board, surface
44129991	covered other than clear or transparent
	Not blockboard: veneered panels and similar laminated wood w/ both outer plies of
44129997	conif, nesoi
44130000	Densified wood, in blocks, plates, strips or profile shapes
48202000	Exercise books of paper or paperboard



(b) Caso qualquer parceiro comercial tome medidas de retaliação contra os Estados Unidos em resposta a esta ação por meio de taxas de importação sobre exportações dos EUA ou outras medidas, posso modificar ainda mais o HTSUS para aumentar ou expandir o escopo das taxas impostas por esta ordem para garantir a eficácia desta ação.



c) Caso qualquer parceiro comercial tome medidas significativas para remediar acordos comerciais não recíprocos e se alinhar suficientemente com os Estados Unidos em questões econômicas e de segurança nacional, posso modificar ainda mais o HTSUS para diminuir ou limitar o escopo das taxas impostas por esta ordem.



(d) Se a capacidade de fabricação e a produção dos EUA continuarem a piorar, posso modificar ainda mais o HTSUS para aumentar as taxas sob esta ordem.

PONTOS DE ATENÇÃO



- Governo Brasileiro deve priorizar o diálogo com o Governo Americano para reverter taxação;
- O ministro das Relações Exteriores, Mauro Vieira, conversou por telefone, na manhã do dia 02 de abril com o representante comercial dos Estados Unidos, Jamieson Greer. Agendaram reunião virtual na próxima semana sobre as tarifas;
- Aprovado projeto de lei da Reciprocidade Econômica que confere poder à Câmara de Comércio Exterior (Camex) para impor sanções comerciais contra países que dificultem a entrada de produtos brasileiros. Projeto foi à sanção.

PONTOS DE ATENÇÃO



CONTATO

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