

08/Novembro/2021



COLETIVA DE IMPRENSA

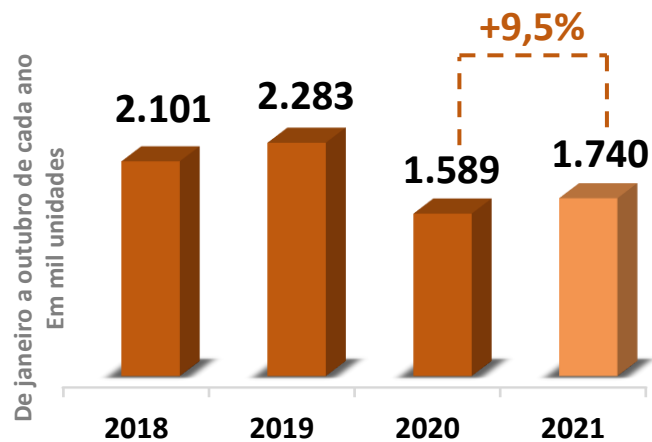
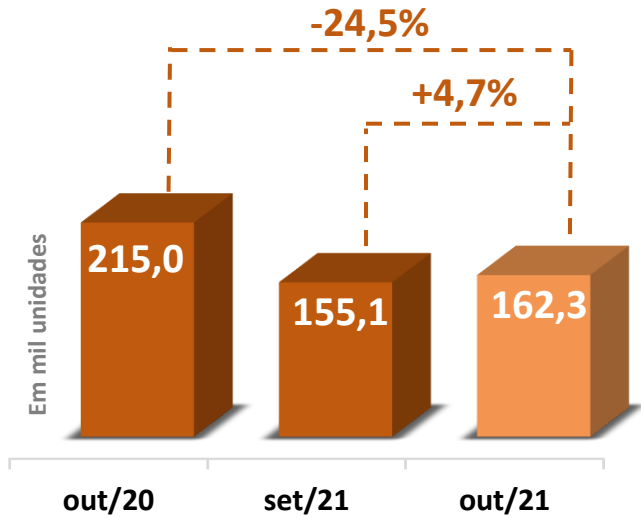
Desempenho da Indústria Automobilística Brasileira

Outubro 2021

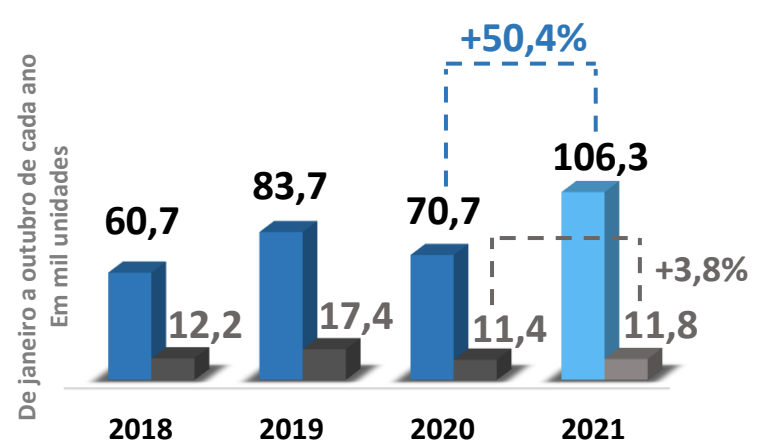
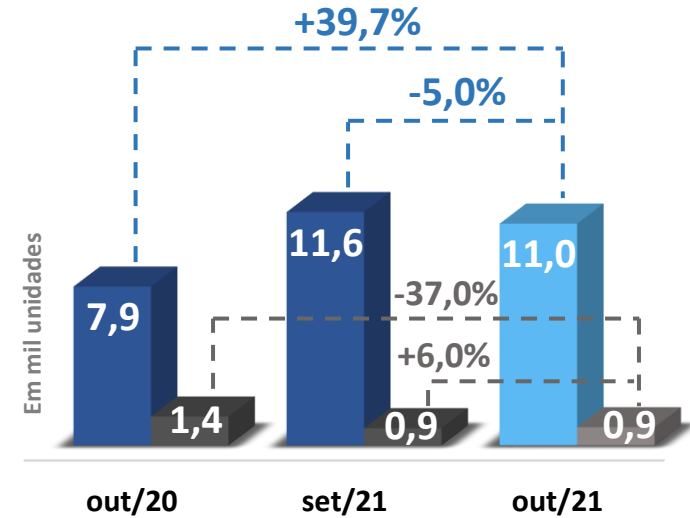


Mercado Interno

Autoveículos



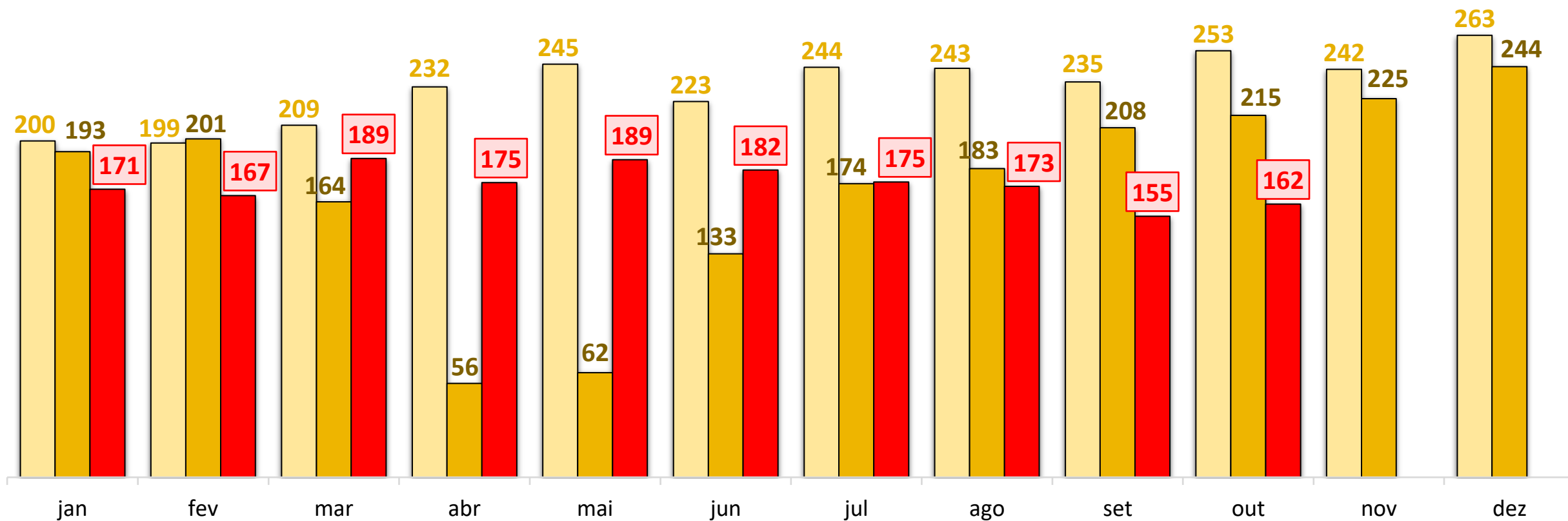
Caminhões e Ônibus



Comparativo 2019, 2020 e 2021 - Autoveículos (mil unidades)

Licenciamento

2019 2020 2021

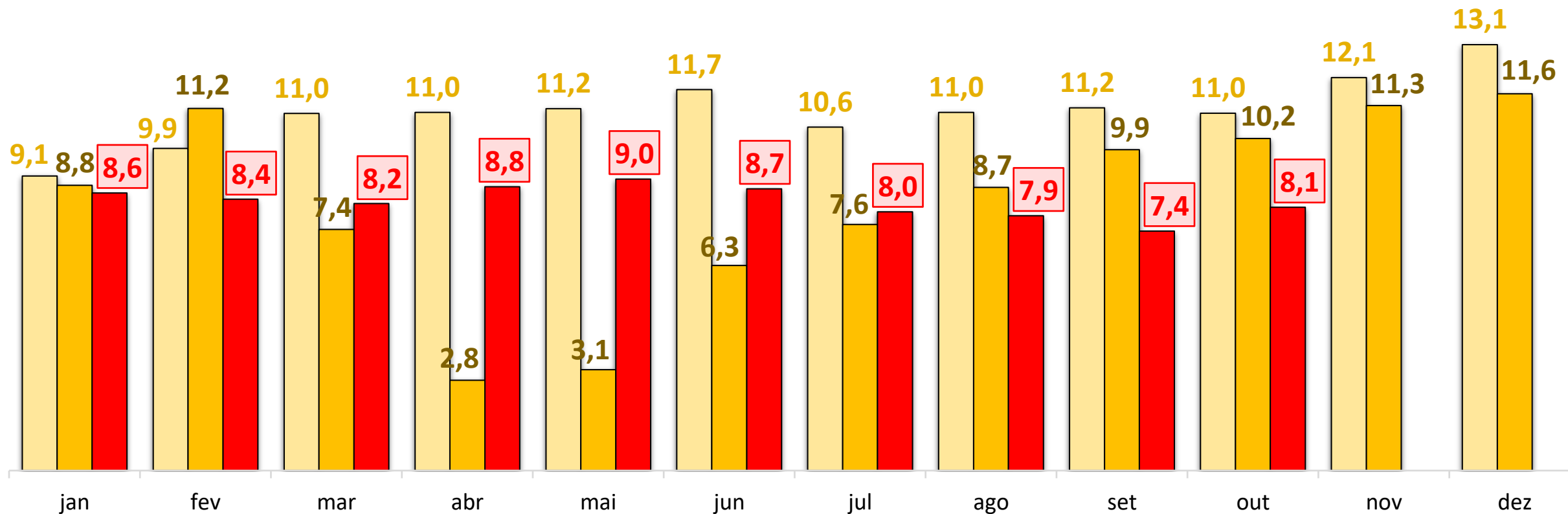


Comparativo 2019, 2020 e 2021 - Autoveículos (mil unidades)



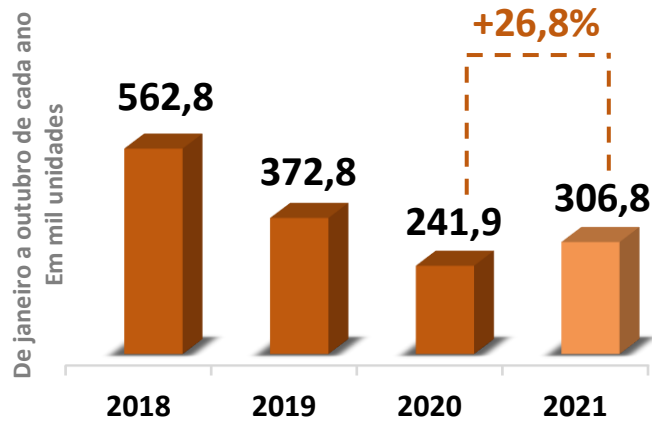
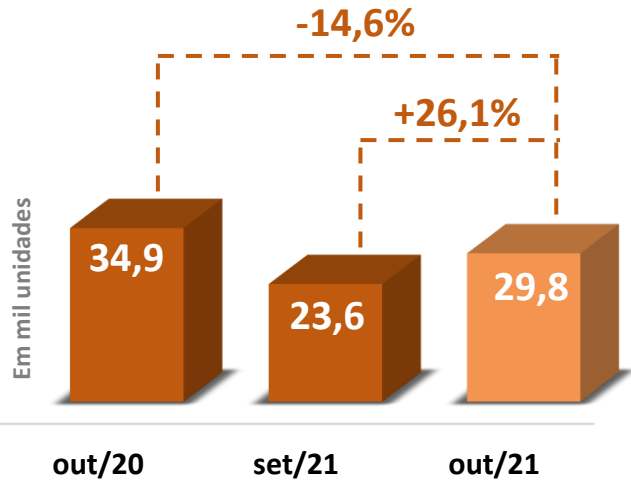
Licenciamento - Média diária

2019 2020 2021

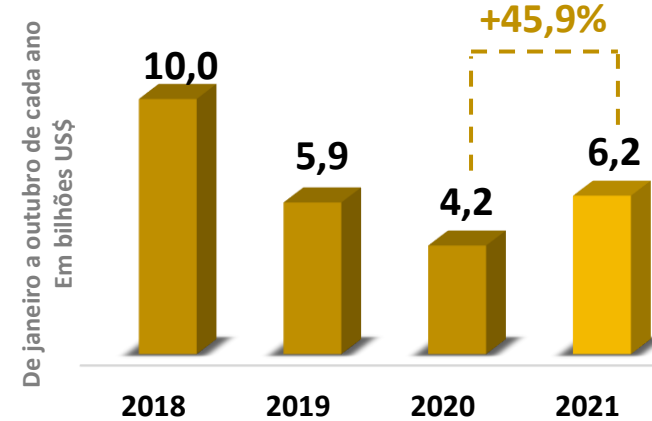
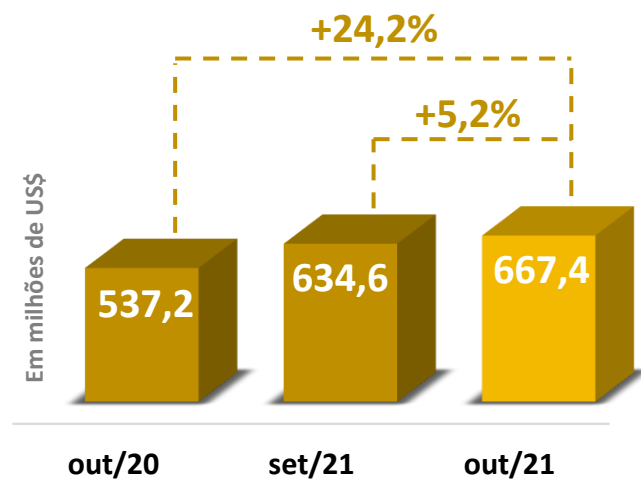


Exportação

Autoveículos

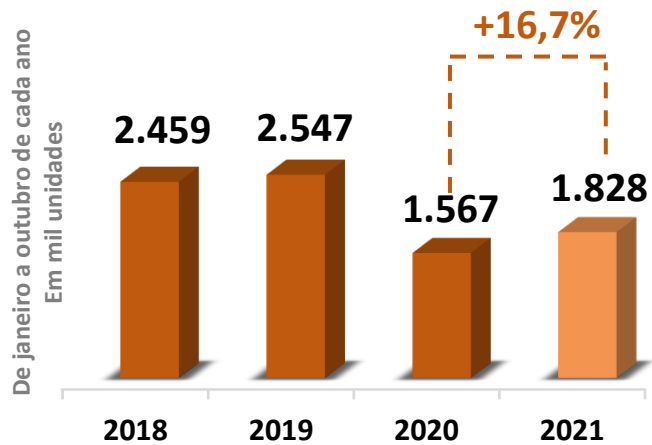
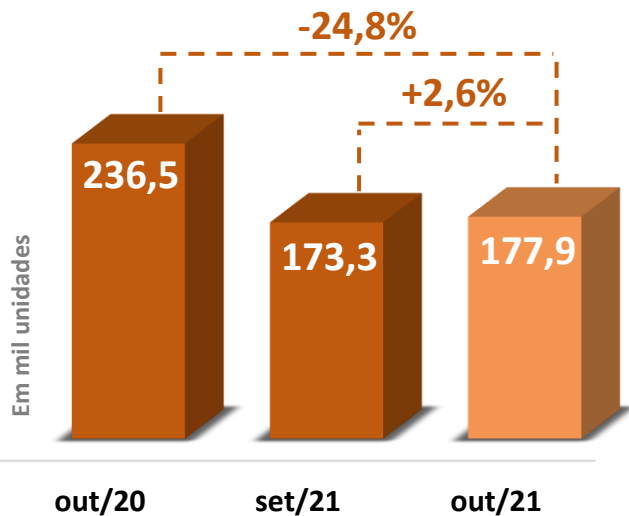


Exportações em valor Autoveículos

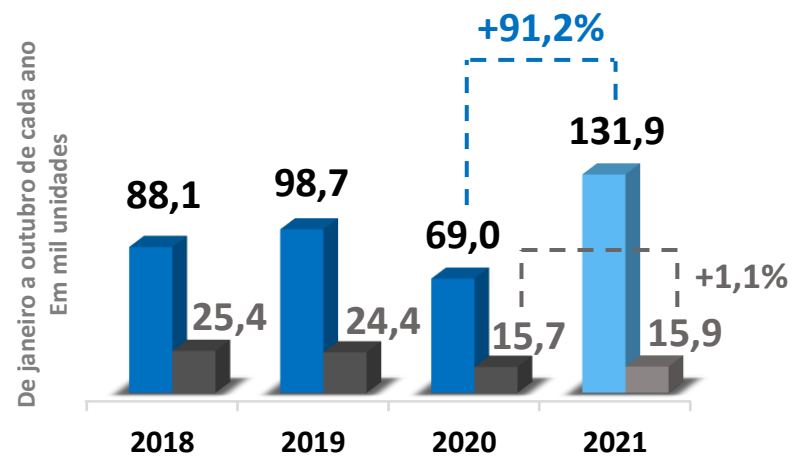
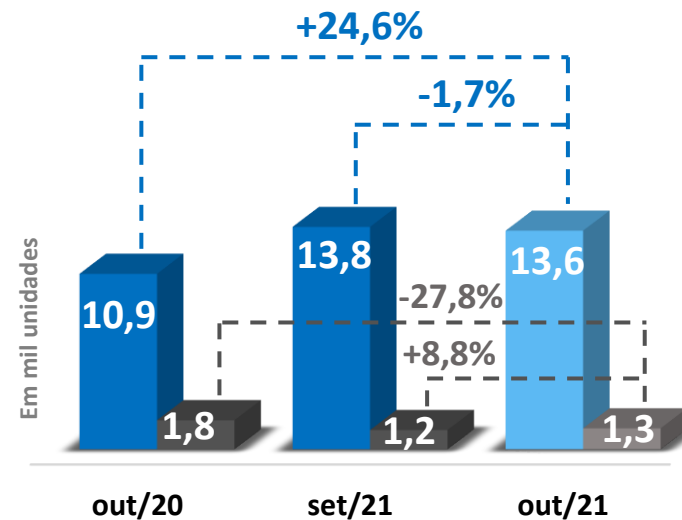




Autoveículos

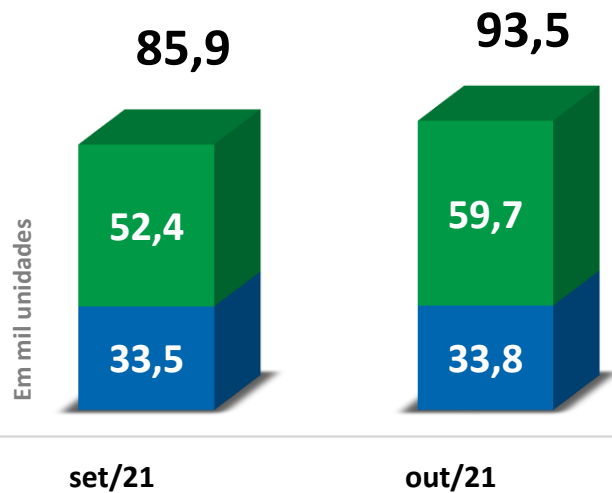


Caminhões e Ônibus



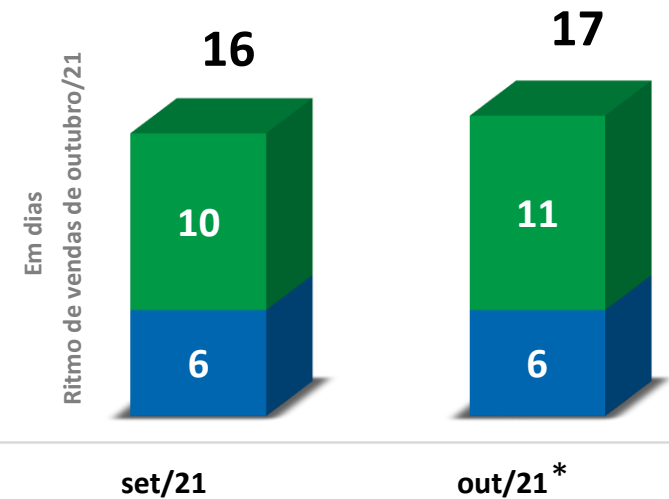
Estoque de Autoveículos

Quantidade

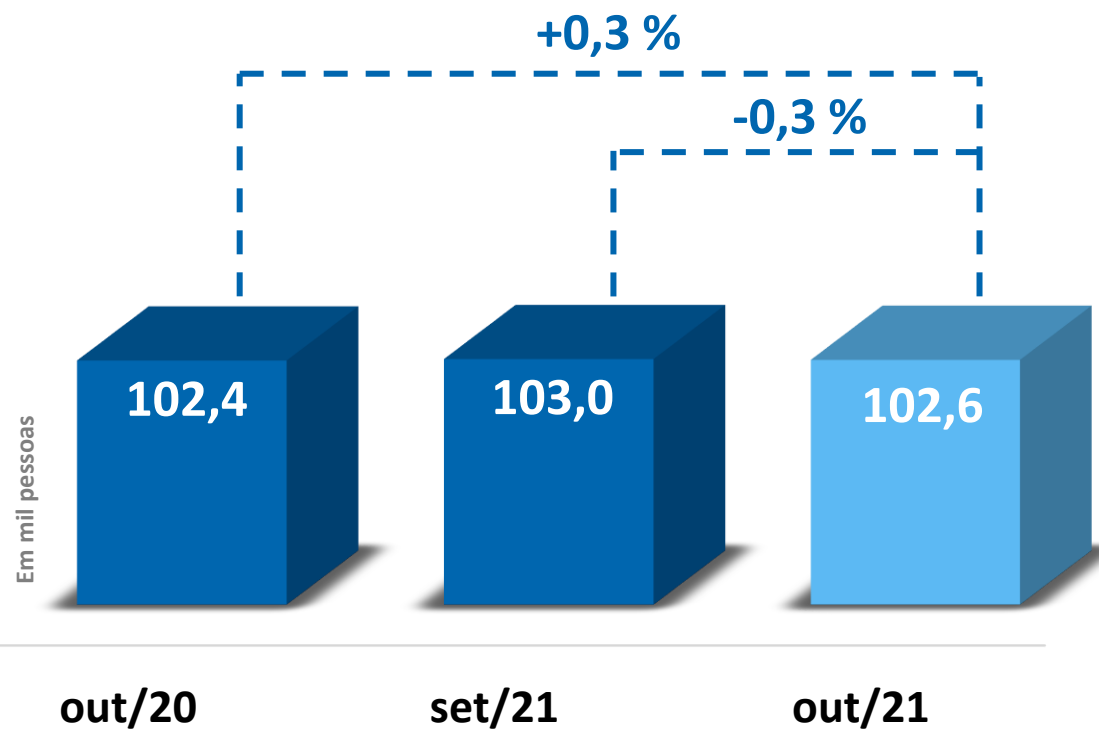


■ Nas concessionárias
■ Nas fábricas (mercado interno)

Dias de estoque

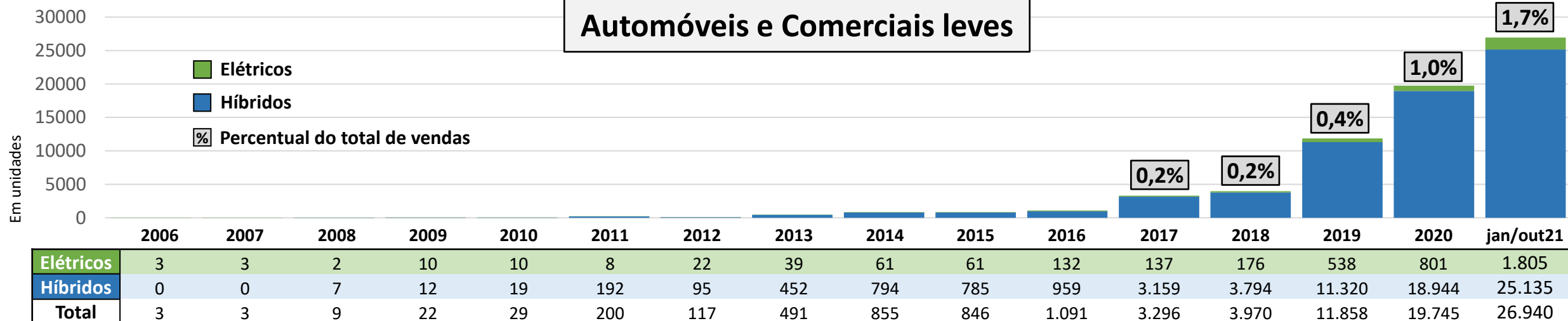


Emprego Autoveículos - Funcionários diretos

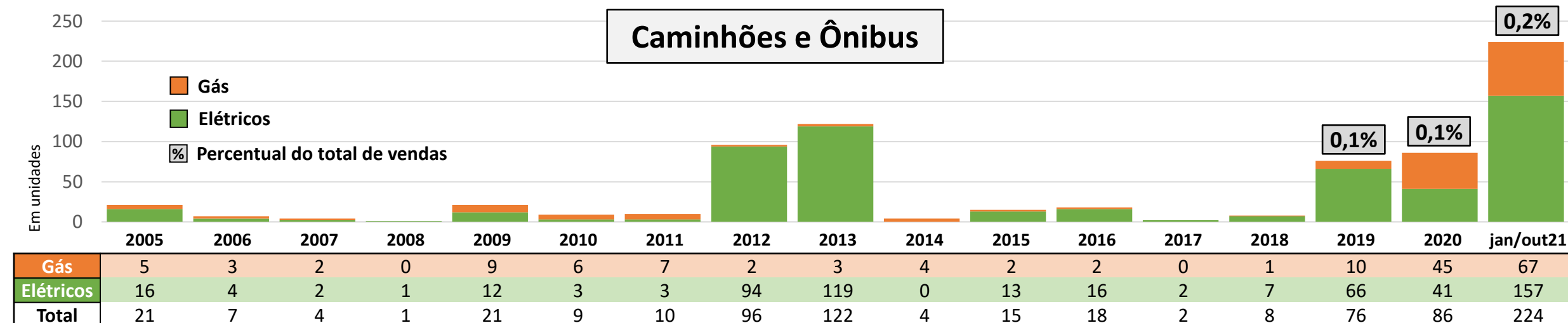


Licenciamento de autoveículos - Novas tecnologias de propulsão

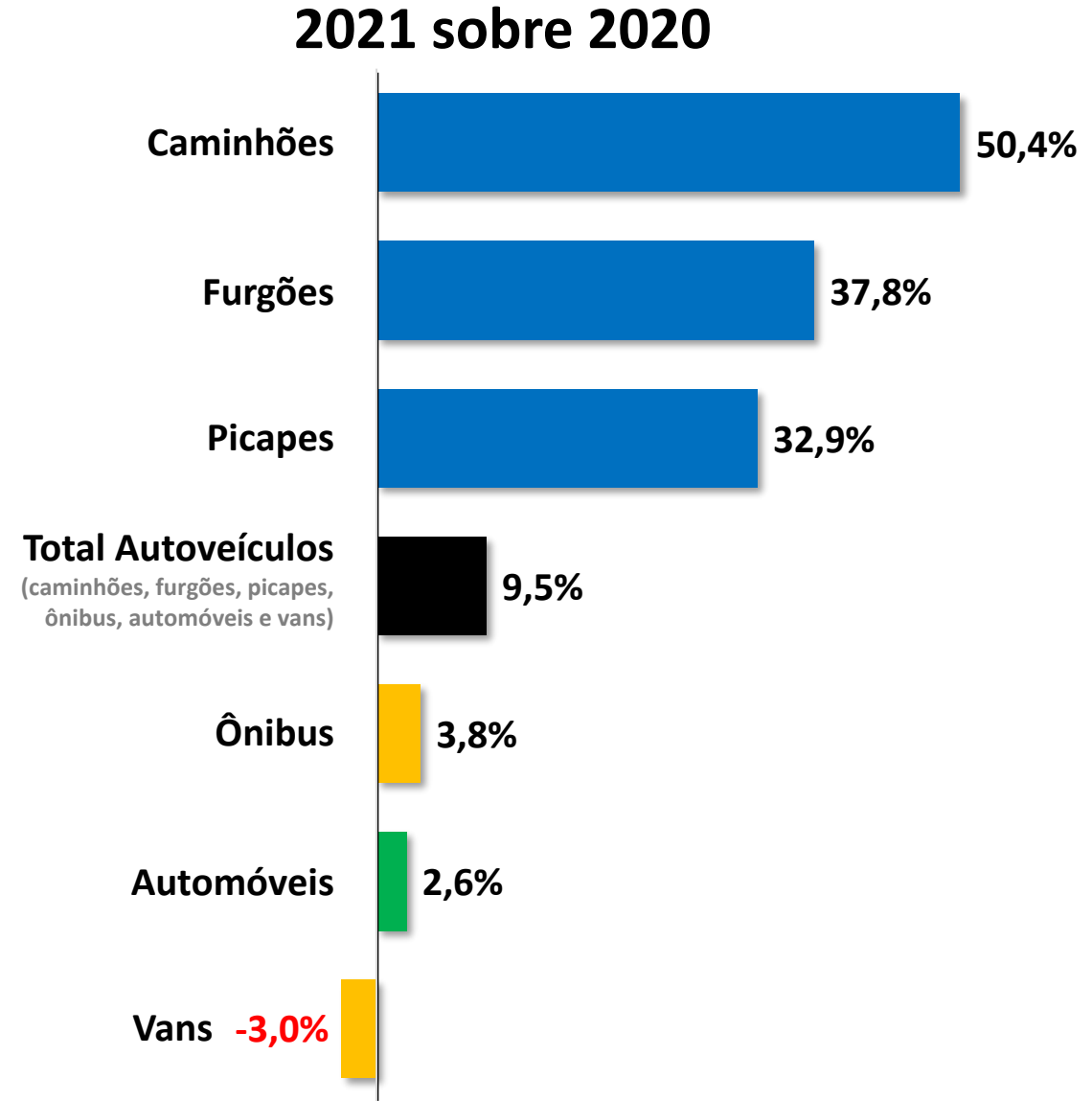
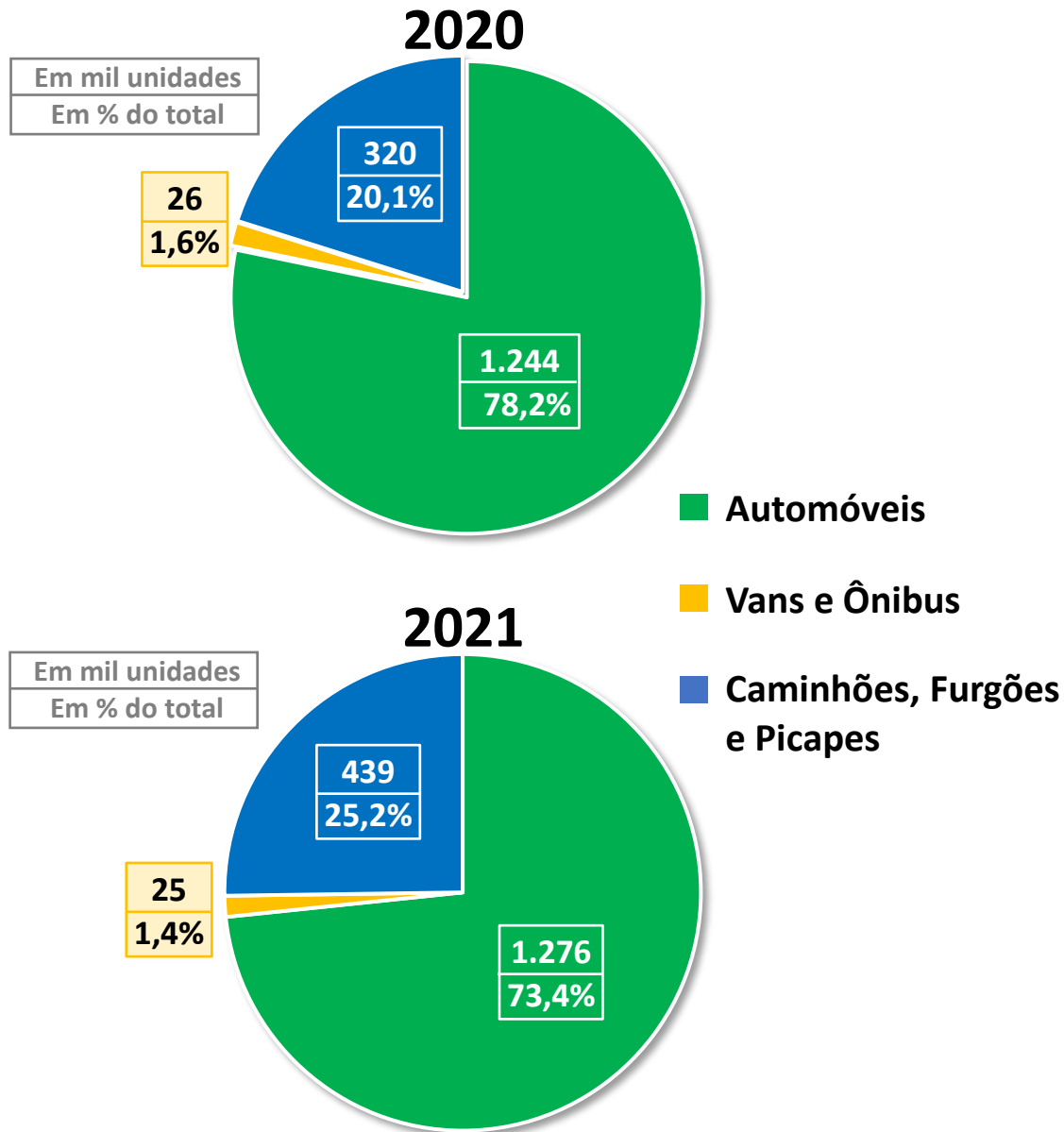
Automóveis e Comerciais leves



Caminhões e Ônibus

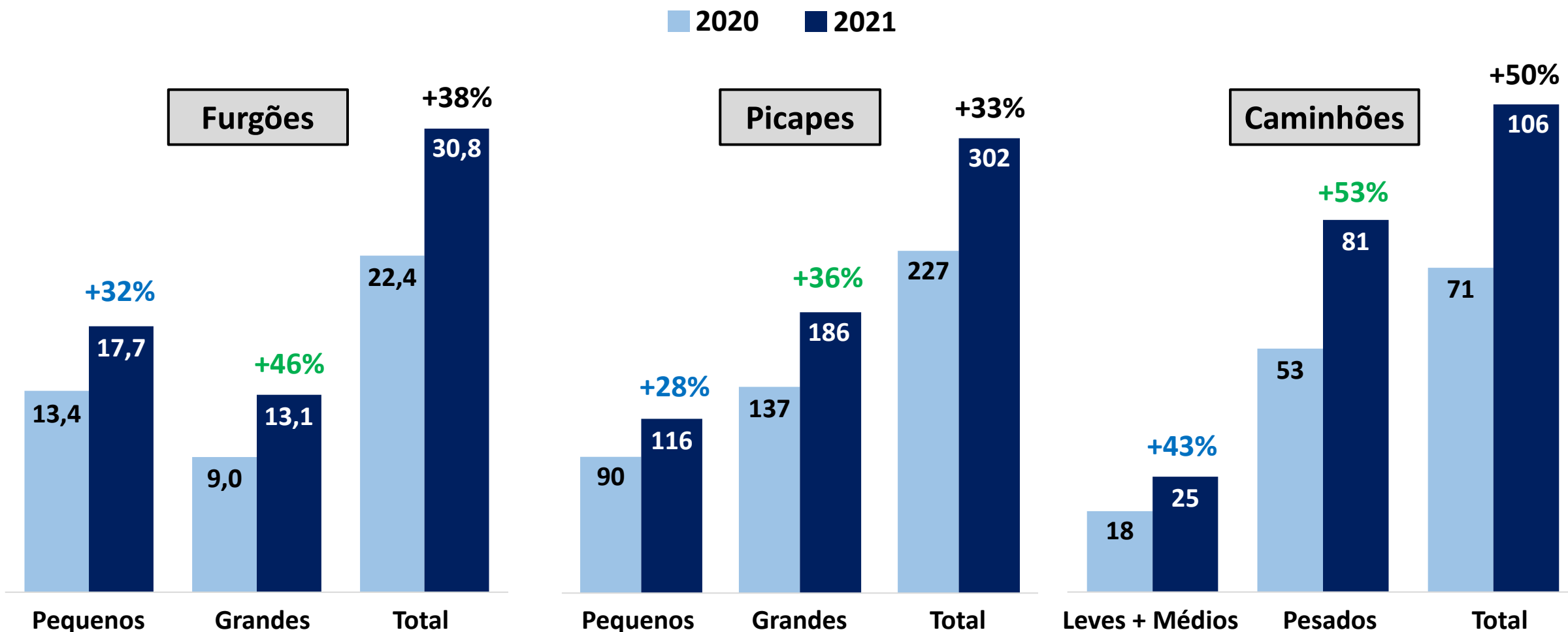


Licenciamento de autoveículos - Comparativo Janeiro a Outubro

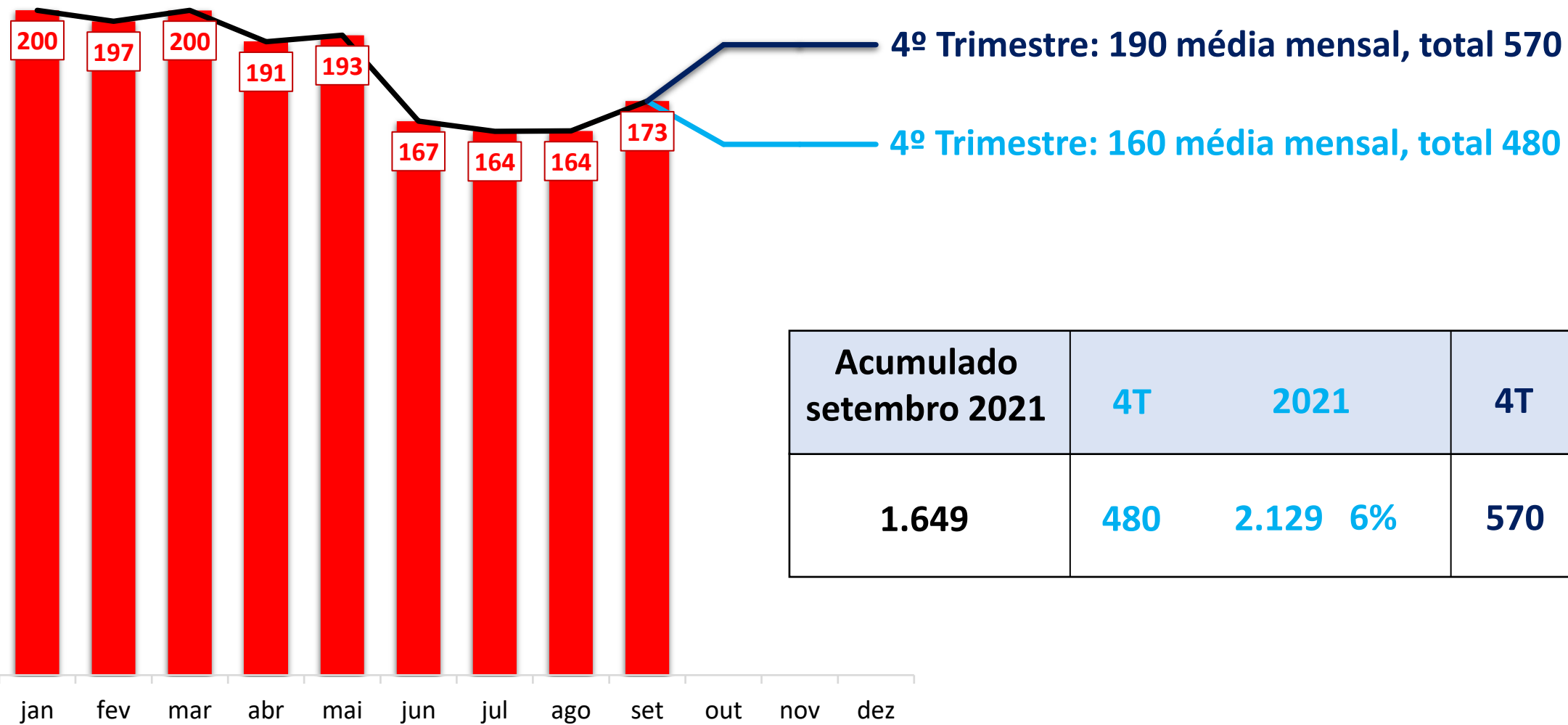


Licenciamento de veículos para transporte de carga

Comparativo Janeiro a Outubro - em mil unidades

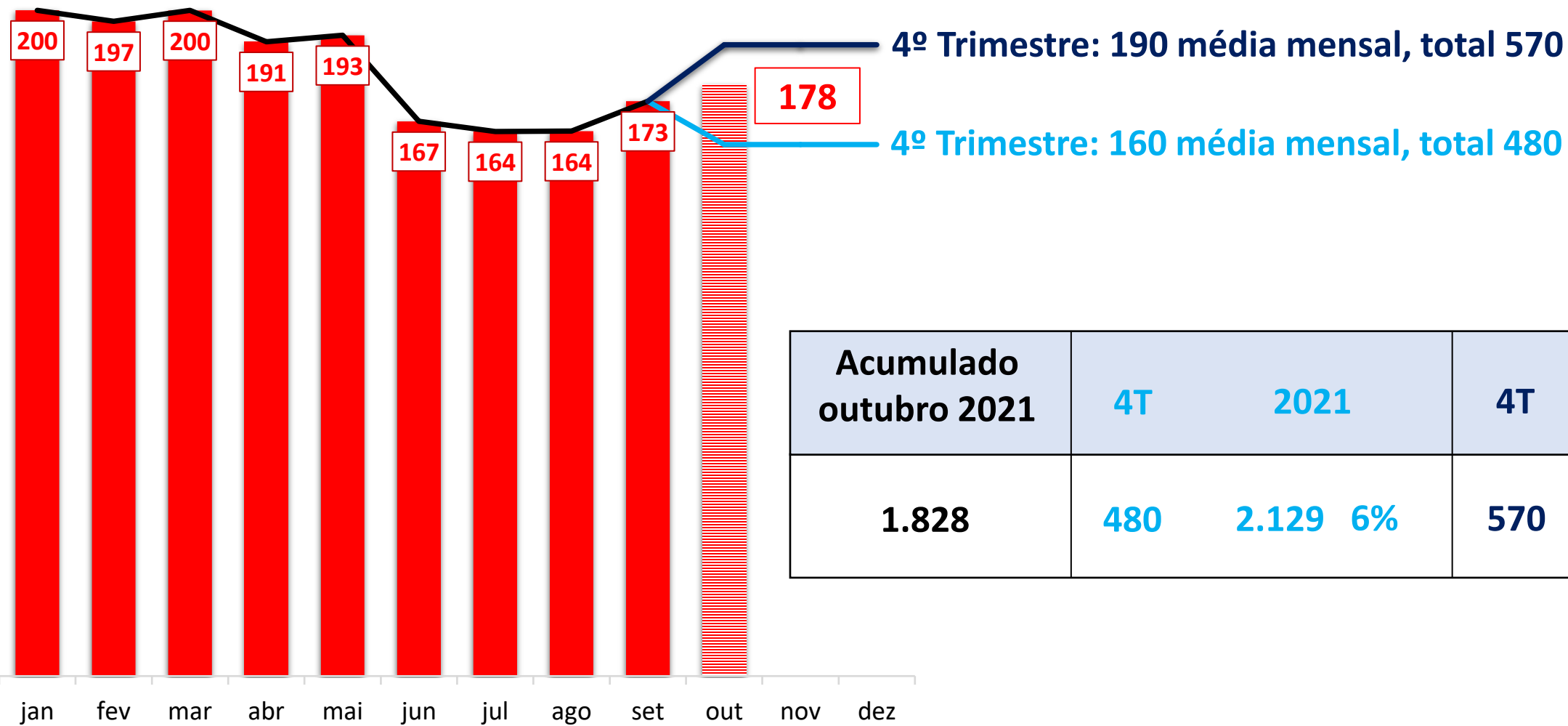


Autoveículos - Cenários de Produção 2021 (mil unidades)



Acumulado setembro 2021	4T		2021			
	4T	2021	4T	2021		
1.649	480	2.129	6%	570	2.219	10%

Autoveículos - Cenários de Produção 2021 (mil unidades)



Acumulado outubro 2021	4T		2021			
	4T	2021	4T	2021		
1.828	480	2.129	6%	570	2.219	10%

Projeções 2021

Autoveículos Automóveis, Comerciais leves, Caminhões e Ônibus		Realizado 2020 mil unidades	2021 Produção mensal média no 4T de 160 mil		2021 Produção mensal média no 4T de 190 mil	
			mil unidades	Δ %	mil unidades	Δ %
Licenciamento	TOTAL	2.058	2.038	-1	2.118	3
	Veículos leves	1.955	1.906	-2	1.980	1
	Veículos pesados	104	132	27	138	33
Exportações	TOTAL	324	357	10	377	16
	Veículos leves	307	331	8	351	14
	Veículos pesados	17,4	25,2	45	26,1	50
Produção	TOTAL	2.014	2.129	6	2.219	10
	Veículos leves	1.905	1.956	3	2.044	7
	Veículos pesados	109	173	58	175	60

Global quarterly light vehicle production (million units)

Automotive units lost (M)



Shortage caused by multiple factors

- Auto semiconductor demand in Q4 up to 10%–15% above pre-COVID levels
- Demand crowded out by demand surge of other sectors
- Supply up by 4%, but not enough to absorb depleted inventories

Continued shortage throughout 2021

- Continued high IC demand from consumers electronics and ICT infrastructure post COVID
- Renesas fire in Japan and Texas blizzard impacted supply
- Expected easing in Q3 not materializing due to plant shutdowns caused by COVID-Delta variant and breakout in Malaysia which caused severe disruption
- Some capacity is being repurposed to Auto, however, with 10-12 week typical manufacturing cycle times, and with foundry capacity locked 6-12 months ahead ...will take time for meaningful change

High IC demand in Q4 driven by back-to-school and Christmas sales in consumer electronics will increase IC shortage again

Outlook 2022:

- Auto will be severely impacted
- >5M units will be lost
- Full stabilization not before 2023

Expected stabilization not before Q1/Q2 2022 due to measures taking effect, including securing capacities from foundries and tier-n suppliers

