

08/Setembro/2021



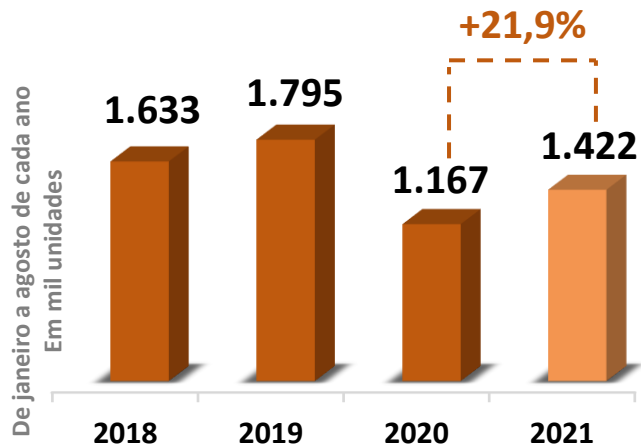
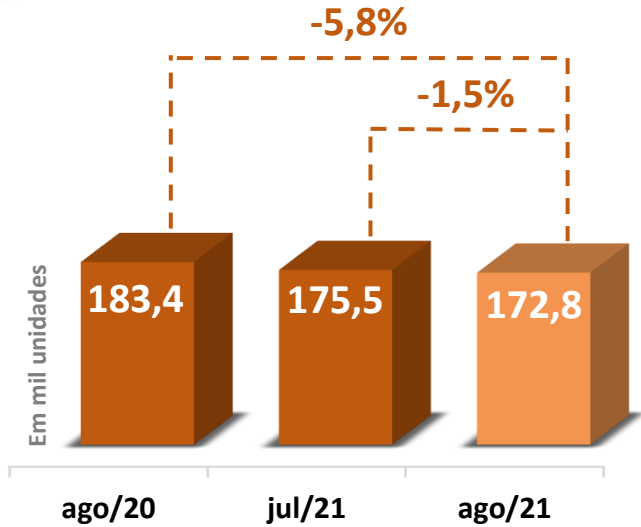
COLETIVA DE IMPRENSA

Desempenho da Indústria Automobilística Brasileira - Agosto 2021

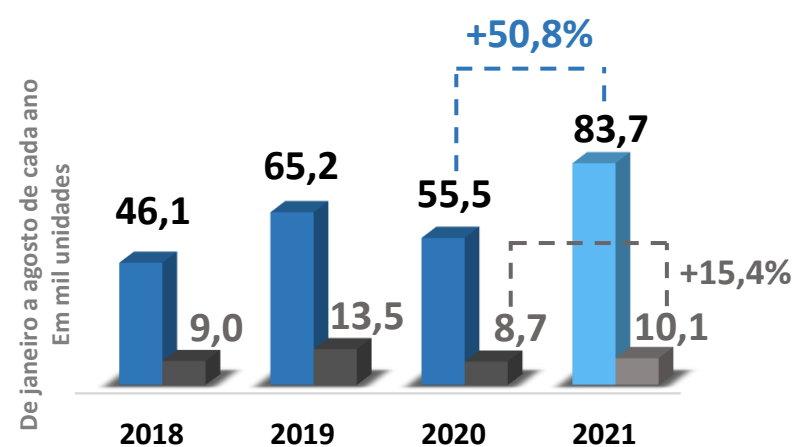
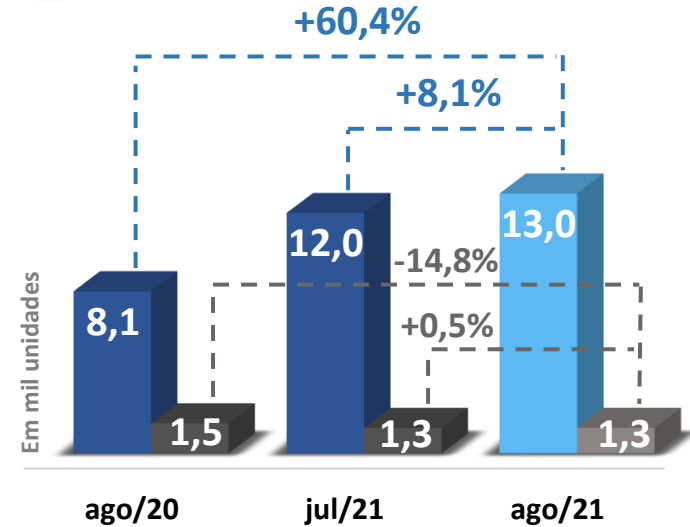


Mercado Interno

Autoveículos

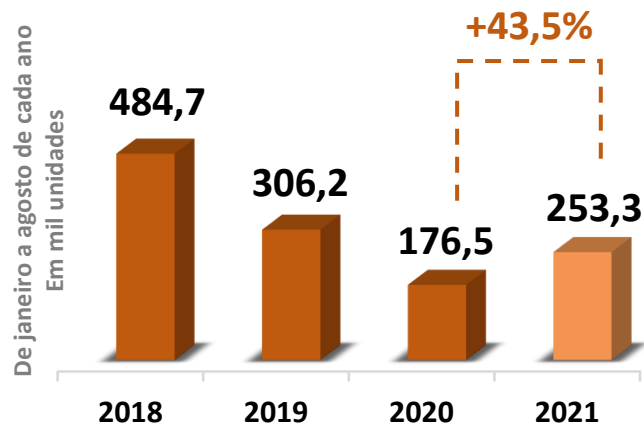
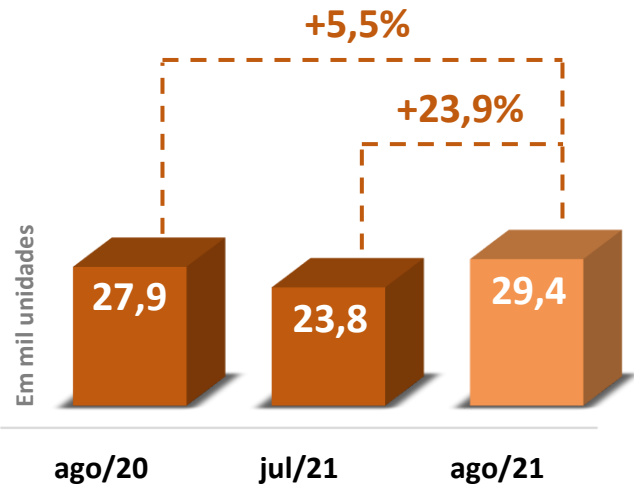


Caminhões e Ônibus

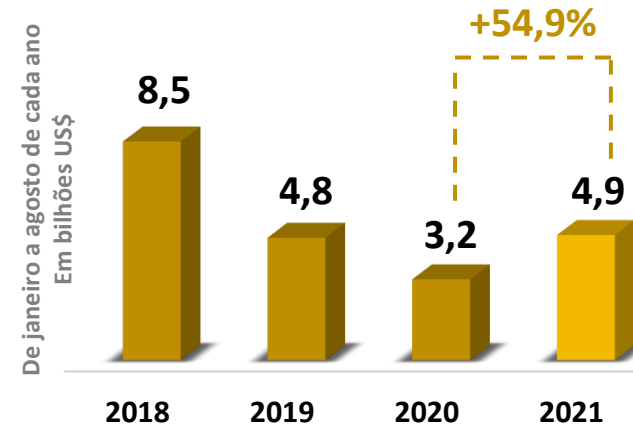
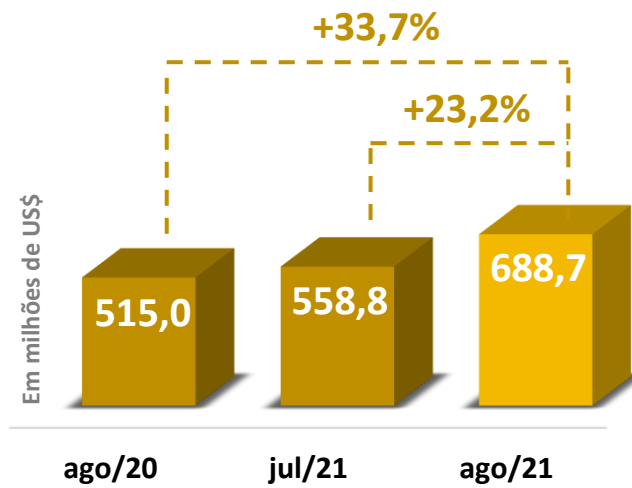


Exportação

Autoveículos

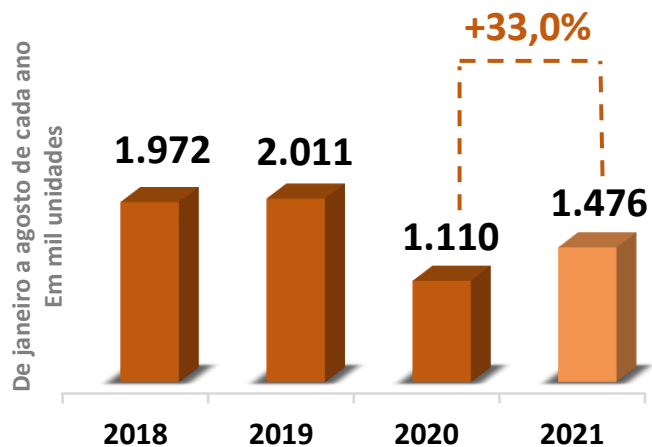
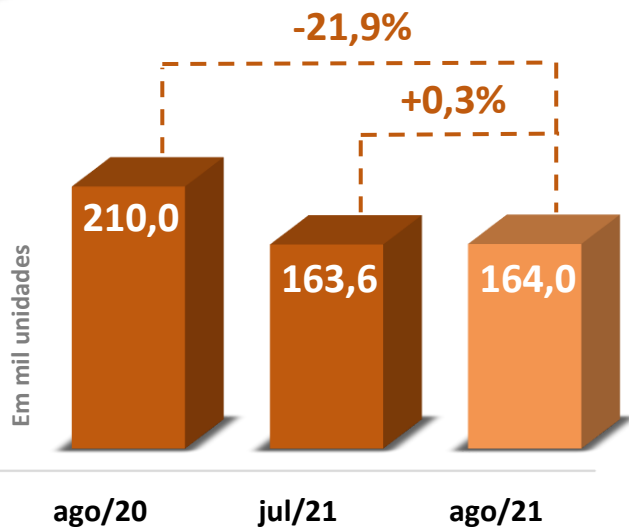


Exportações em valor Autoveículos

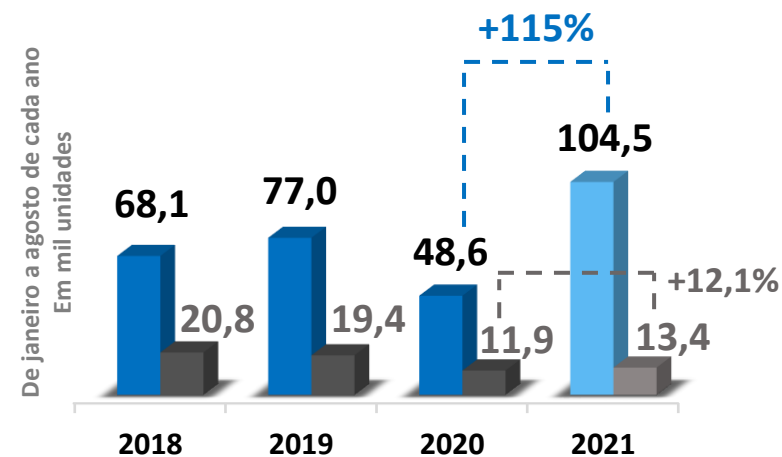
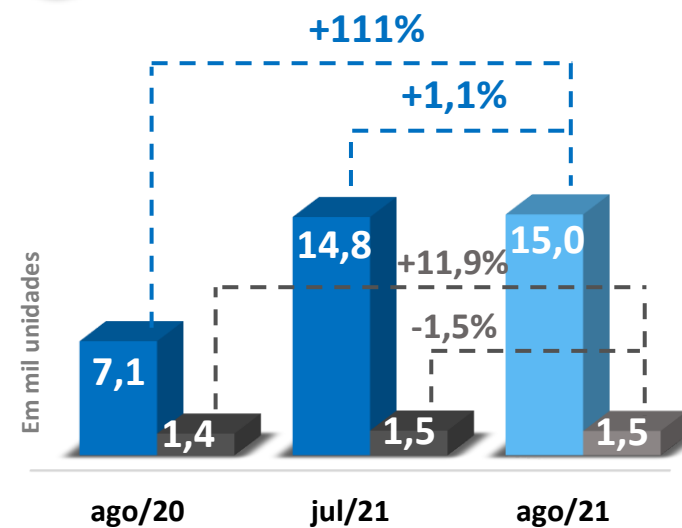




Autoveículos

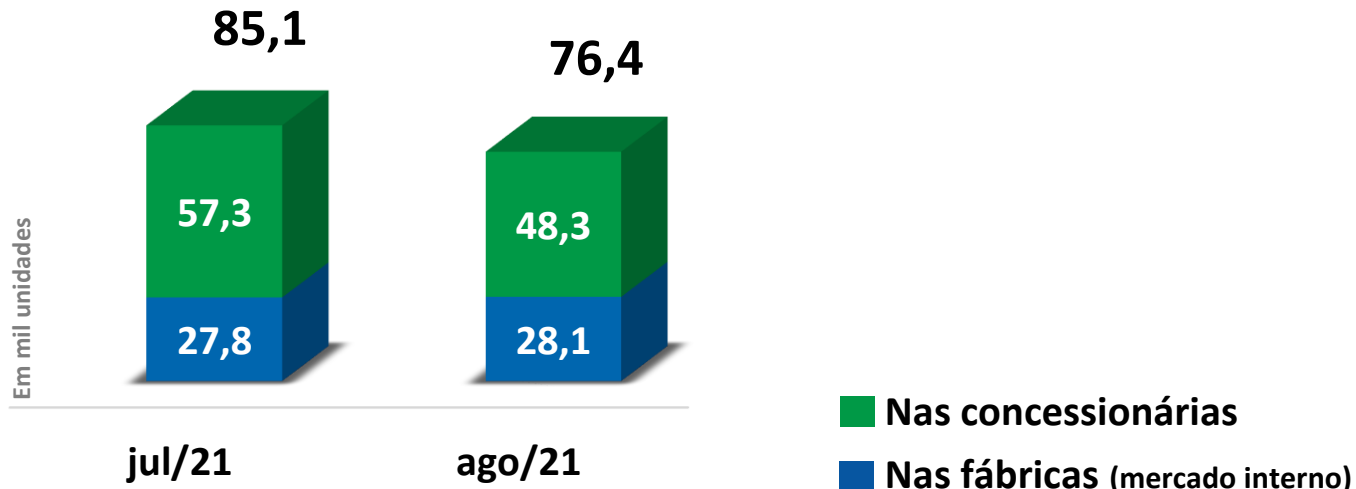


Caminhões e Ônibus

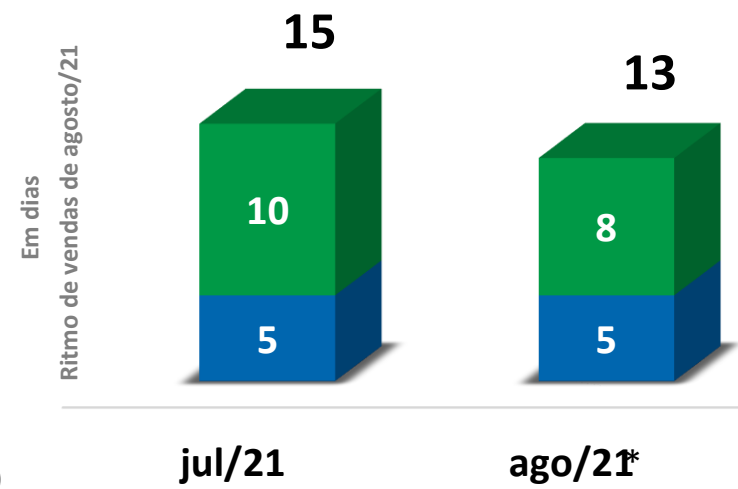


Estoque de Autoveículos

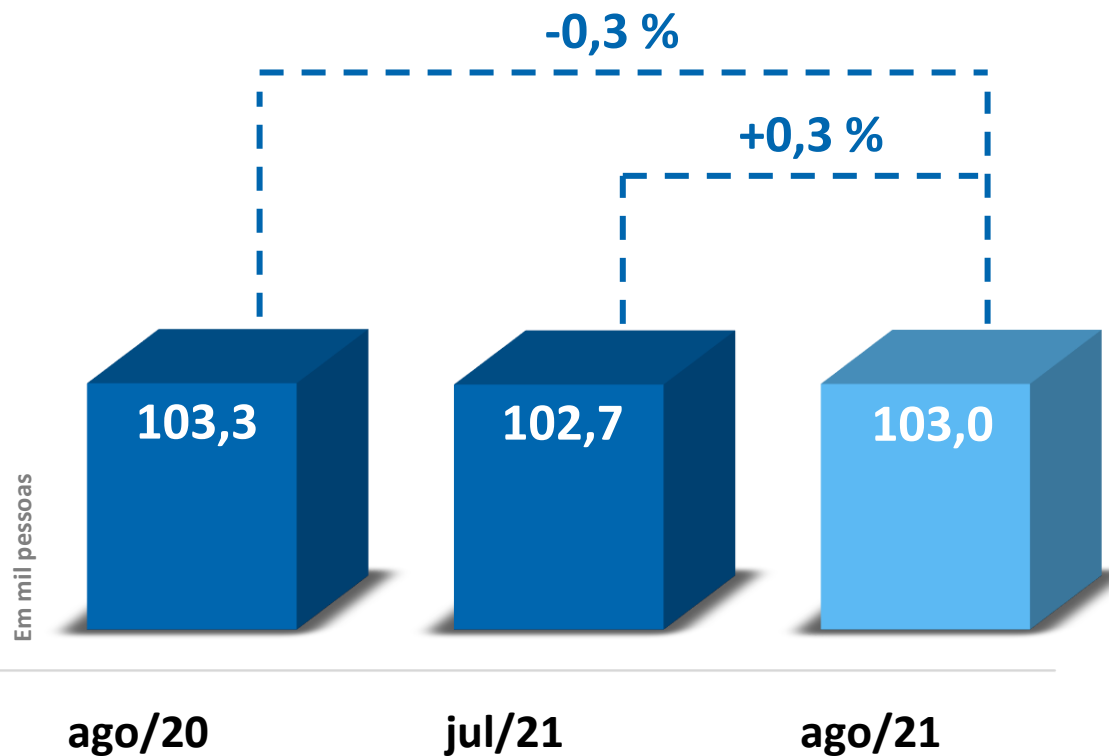
Quantidade



Dias de estoque



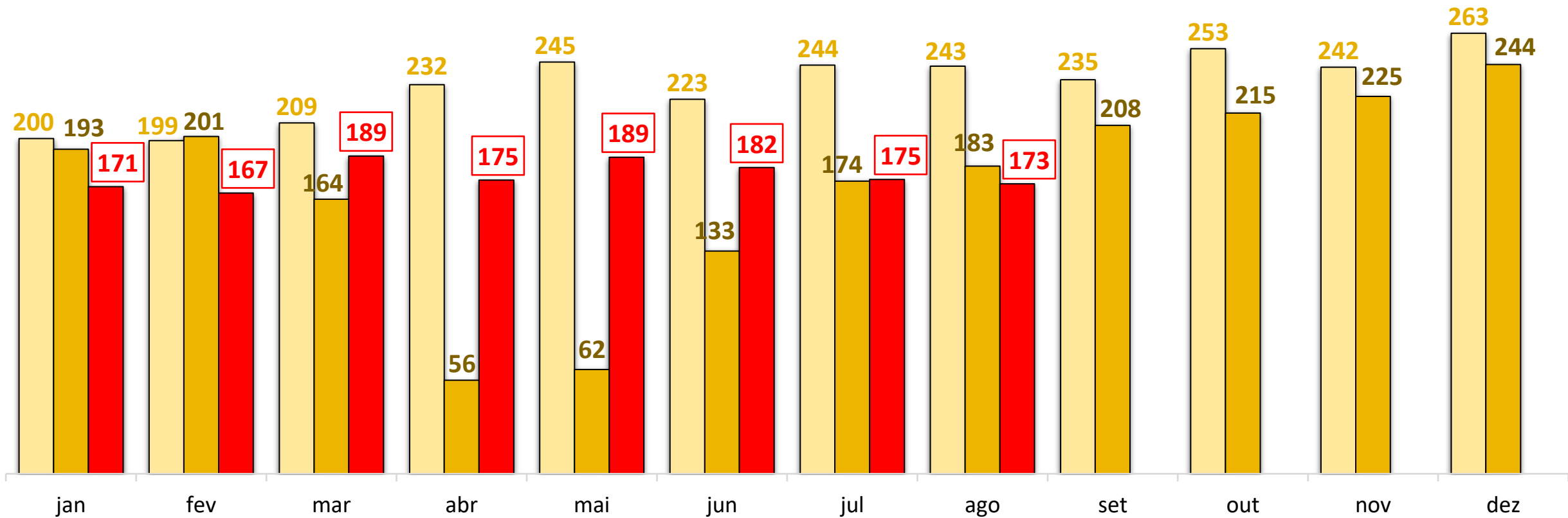
Emprego Autoveículos - Funcionários diretos



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

Licenciamento

2019 2020 2021

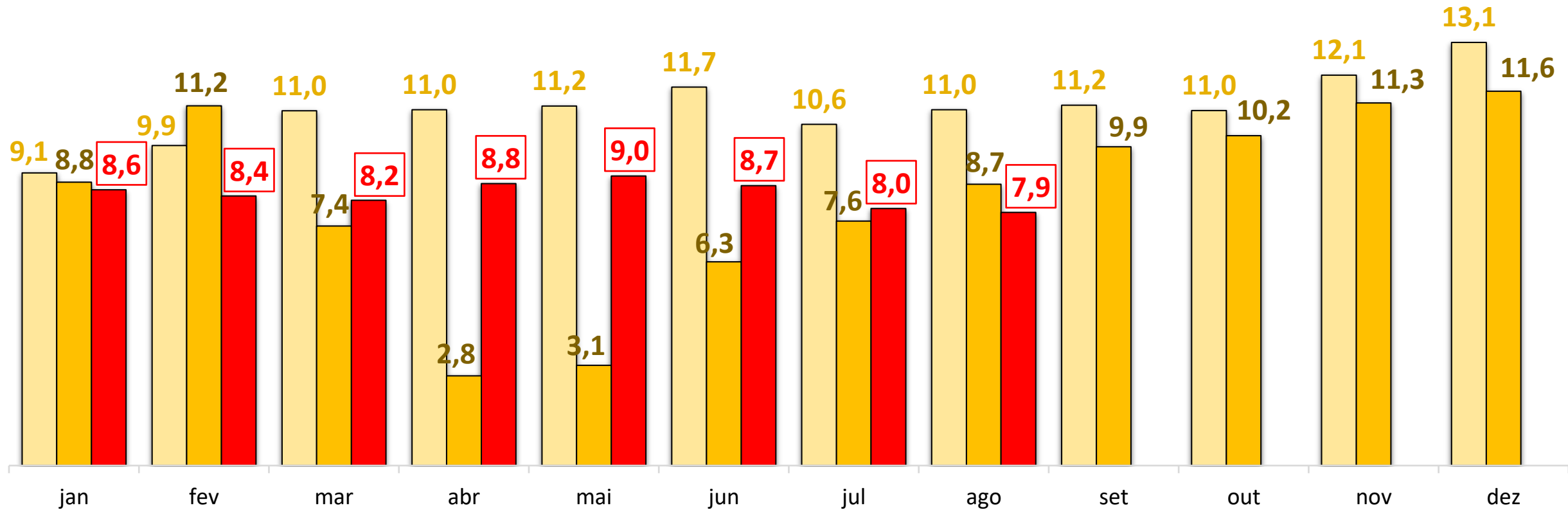


Comparativo 2019 x 2020 x 2021 - Autoveículos (mil unidades)



Licenciamento - Média diária

2019 2020 2021

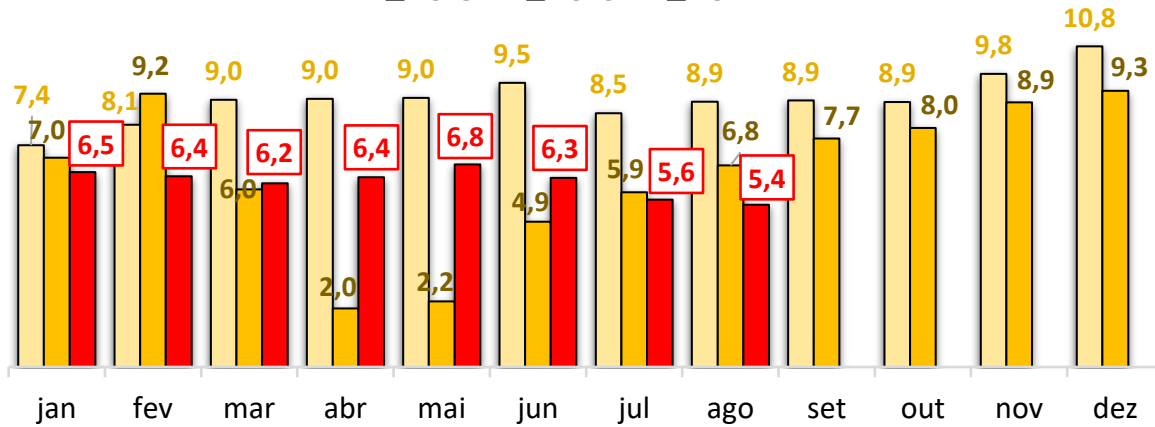


Comparativo 2019/20/21 - Licenciamento - Média Diária



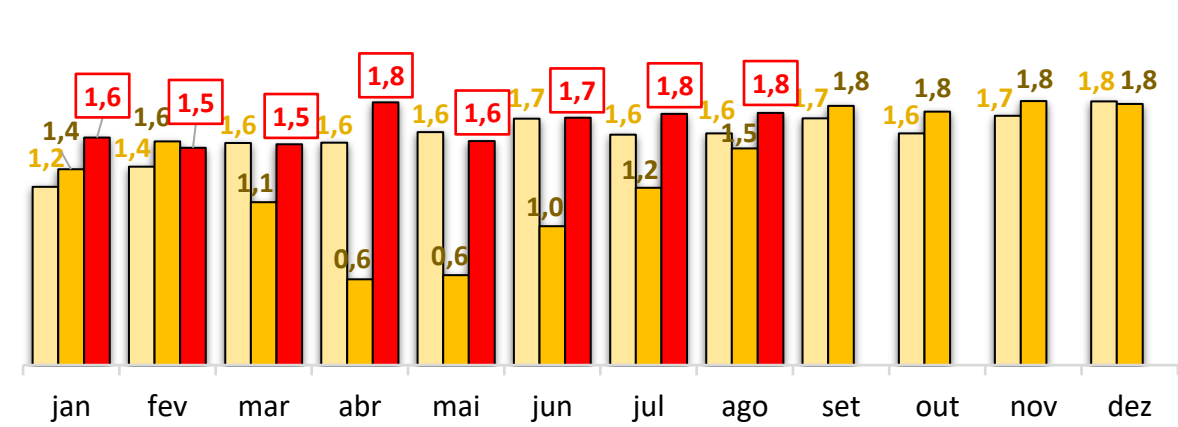
Automóveis (mil unidades)

2019 2020 2021



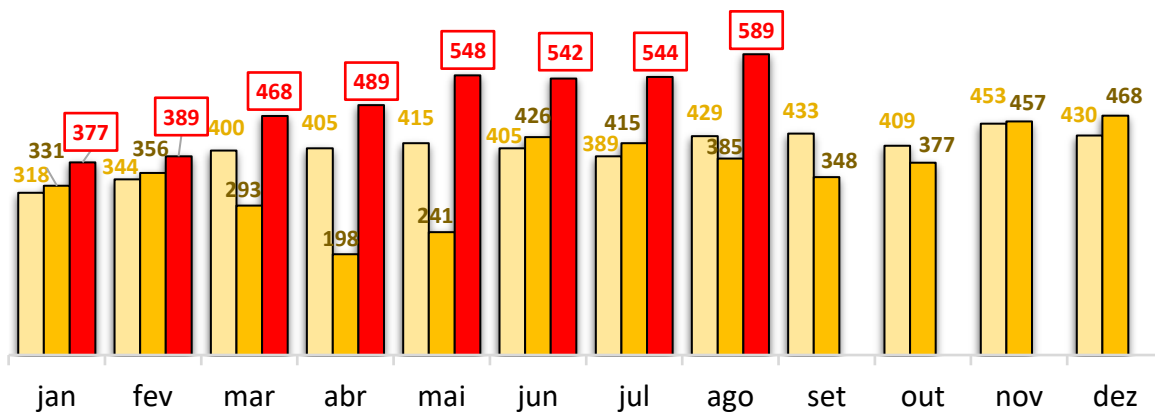
Comerciais Leves (mil unidades)

2019 2020 2021



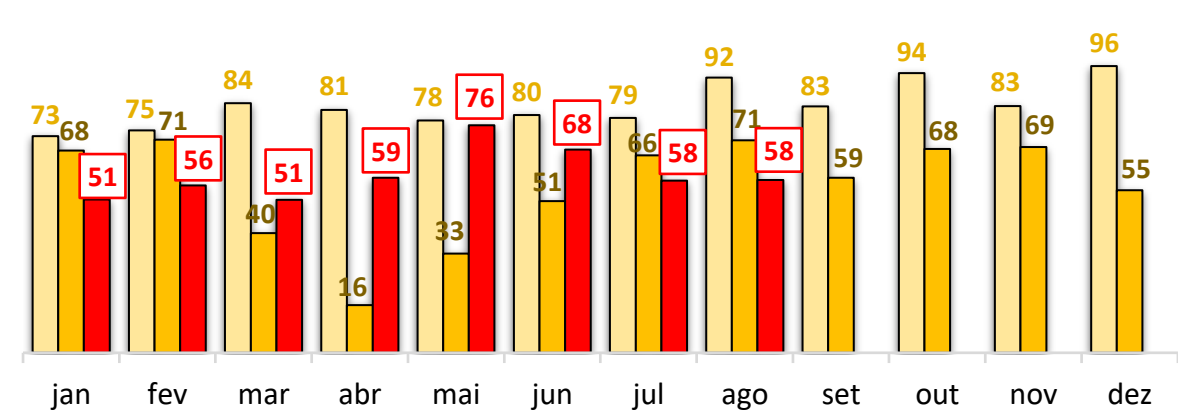
Caminhões (unidades)

2019 2020 2021



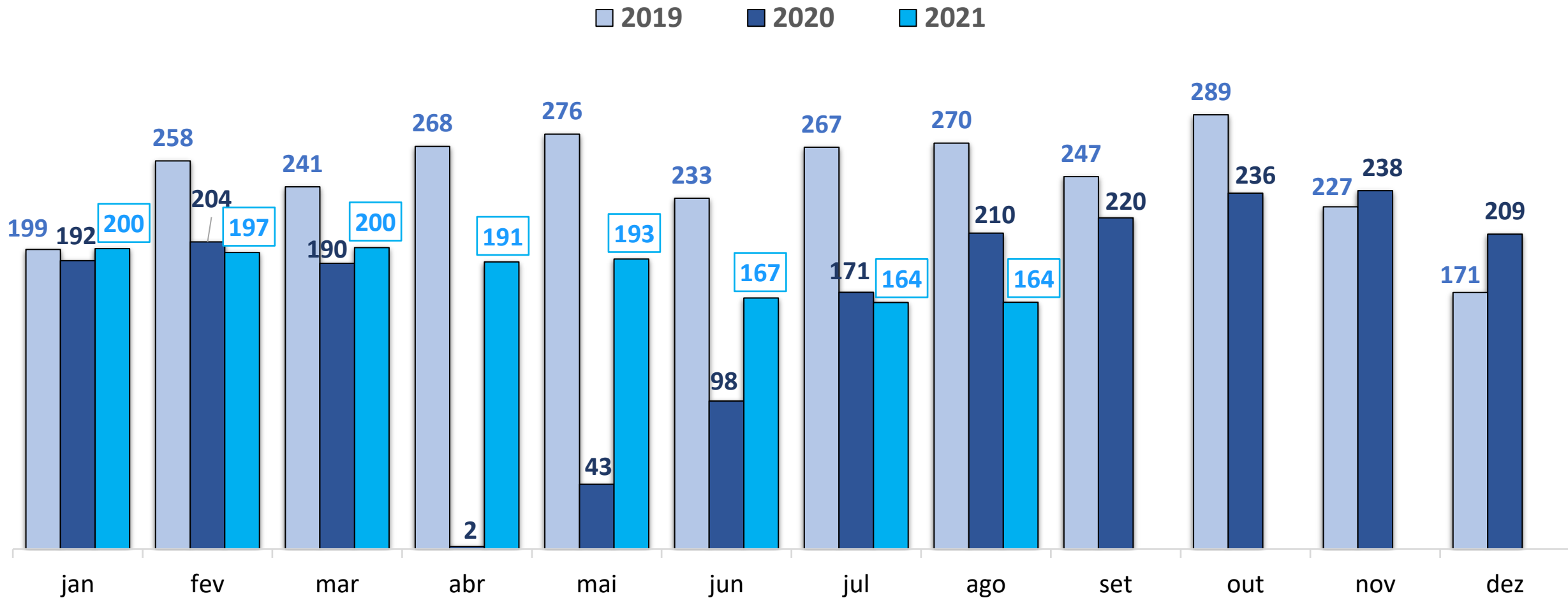
Ônibus (unidades)

2019 2020 2021



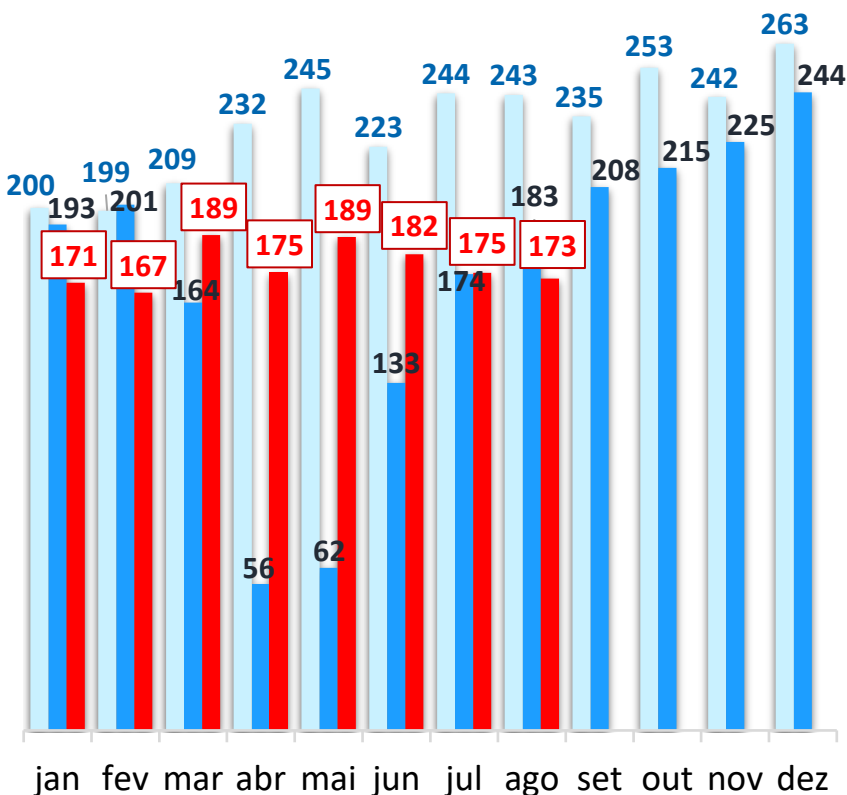
Comparativo 2019, 2020 e 2021 - Autoveículos (mil unidades)

Produção

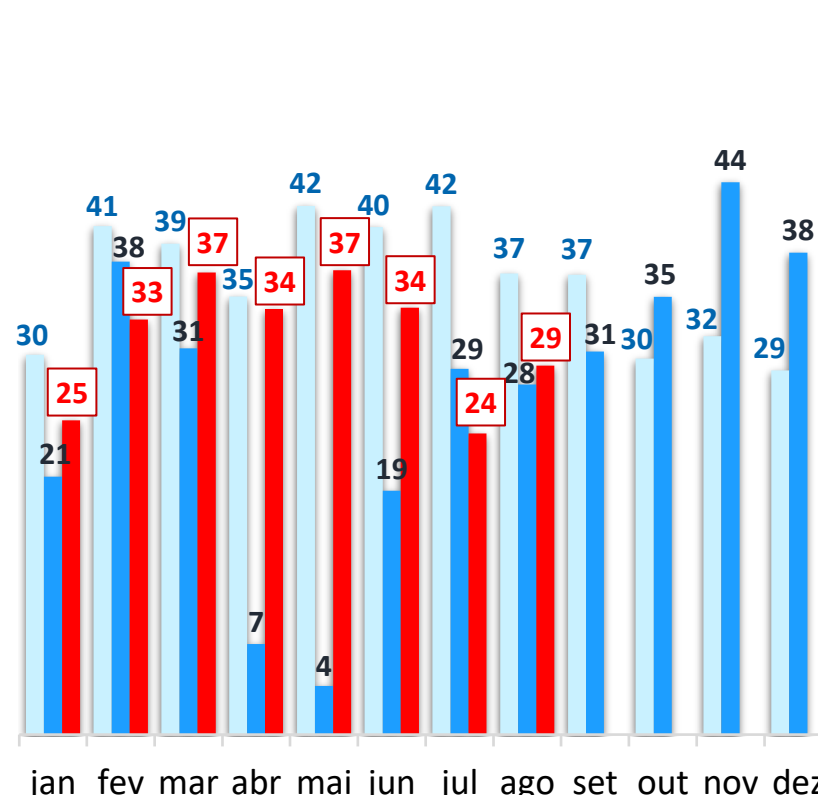


Comparativo 2019 x 2020 x 2021 - Autoveículos (mil unidades)

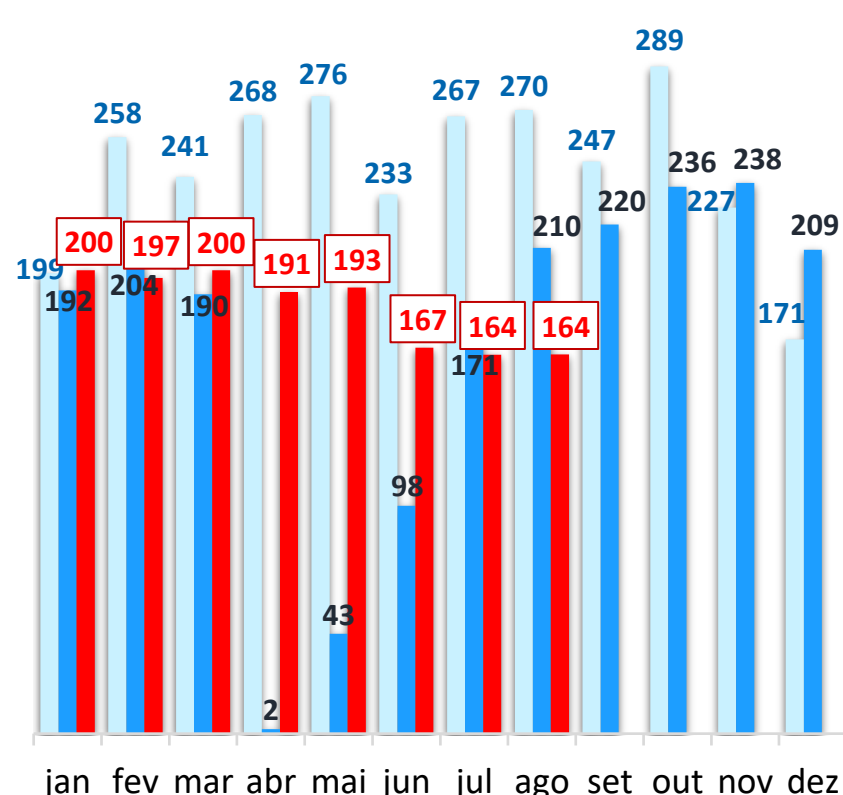
Licenciamento



Exportações



Produção

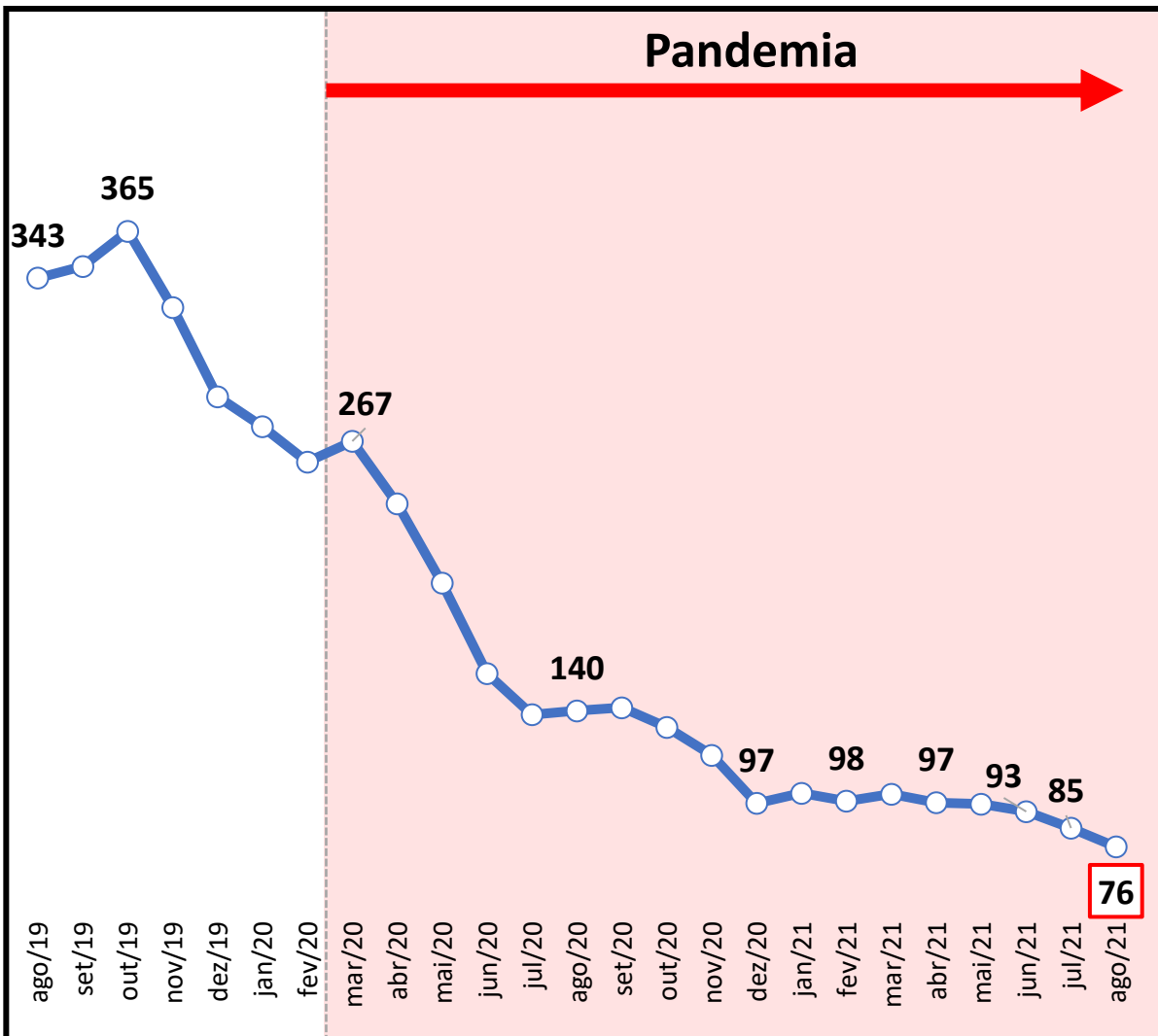


■ 2019
 ■ 2020
 ■ 2021

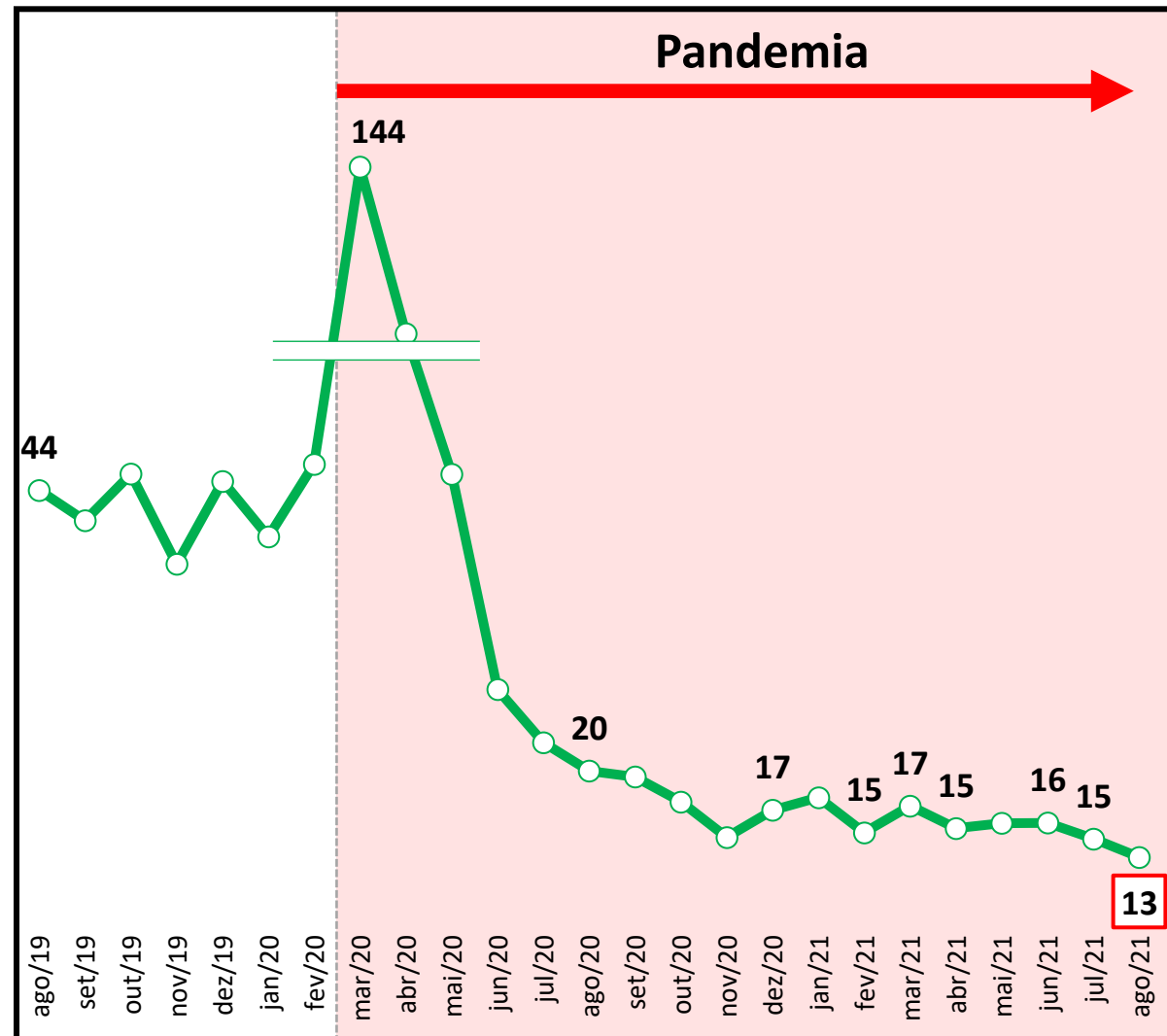
Estoque de Autoveículos (fábrica + concessionários)



Quantidade (mil unidades)



Dias de estoque



Semicondutores - Mundo

The Washington Post 05/set/21

Until 2023? Parts shortage will keep auto prices sky-high

Forbes 04/set/21

Global chip shortage could drag on until 2023

Bloomberg 02/set/21

Tesla's China Output Halted for Days Last Month on Chip Shortage

The Korea Herald 01/set/21

Aug. car sales fall 4.5% amid chip shortage

THE ECONOMIC TIMES 04/set/21

Chip shortage to cost automakers \$1 billion in September revenues

 **CNBC** 03/set/21

Buying a new car is a challenge amid a global chip shortage and limited inventory.

 **REUTERS®** 02/set/21

India's Mahindra sees Sept car output down by a quarter on chip shortage

THE WALL STREET JOURNAL. 29/ago/21

Covid-19 Surge in Malaysia Threatens to Prolong Global Chip Shortage

Crisis results from a global mismatch between supply and demand which has been building for years, situation expected to be stabilised late CY2022

Global quarterly light vehicle production (million units)

Automotive units lost

-0.2M

-1.4M

-2.6M

-2.3M

-1.0M to -2.0M

7-9M
Units lost in 2021

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
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 Xmas sales in consumer electronics will increase IC shortage again

How will 2022 be impacted?
- Ease of supply constraint?
- Shift of demand from 2021 to 2022?
- Rebuilding of inventory levels?

Expected stabilization not before H2 2022 due to measures taking effect including securing capacities from foundries / tier-n suppliers



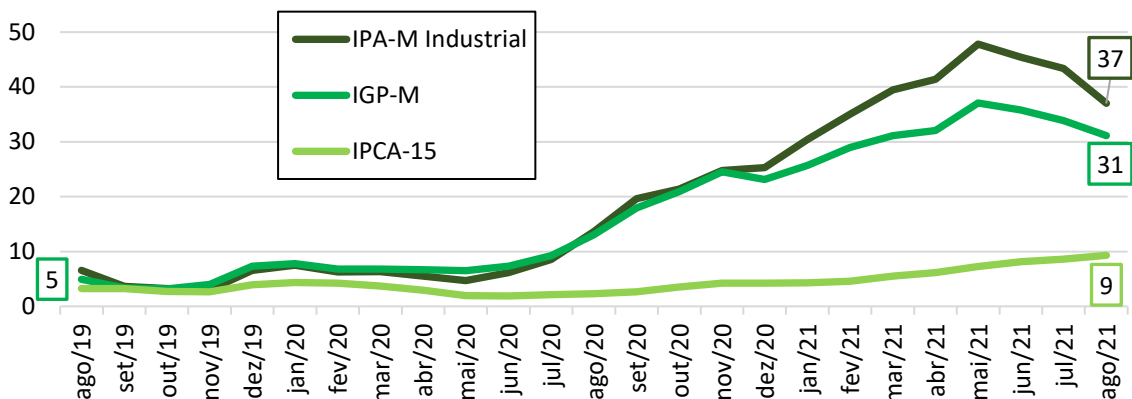
— Potential volumes (w/o IC shortage)
— Reduced volumes due to IC shortage

XX Expected amount of units lost, in millions

Source: IHS Markit (August 16, 2021), expert interviews, BCG analysis

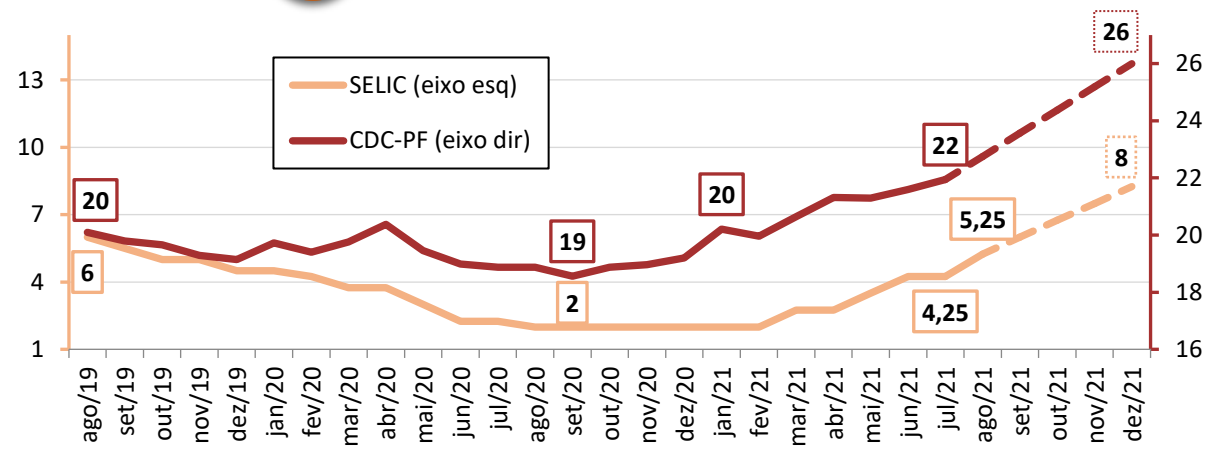
Cenário Macroeconômico - Indicadores Seleccionados

Inflação (% acumulado 12 meses)



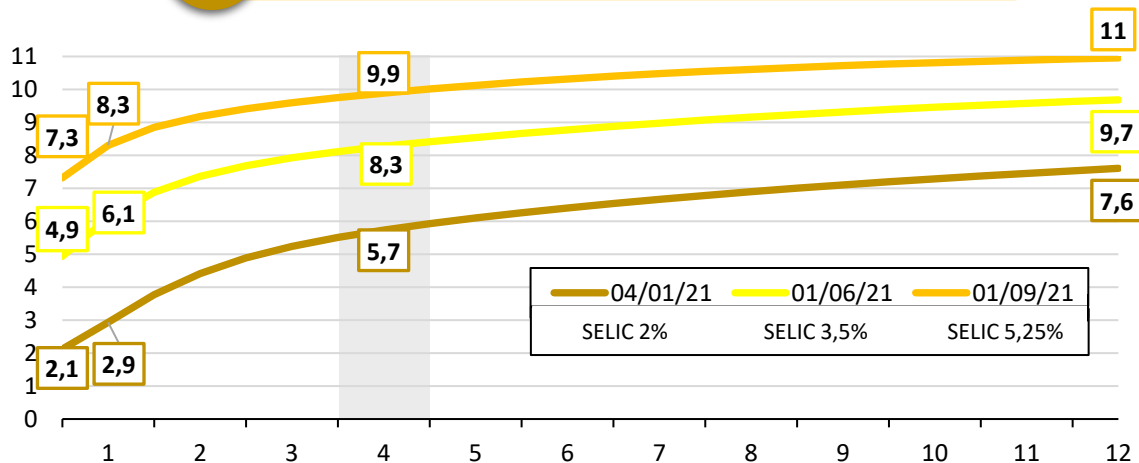
Fontes: IBGE e FGV - Elaboração: ANFAVEA

SELIC e Juros ao consumidor



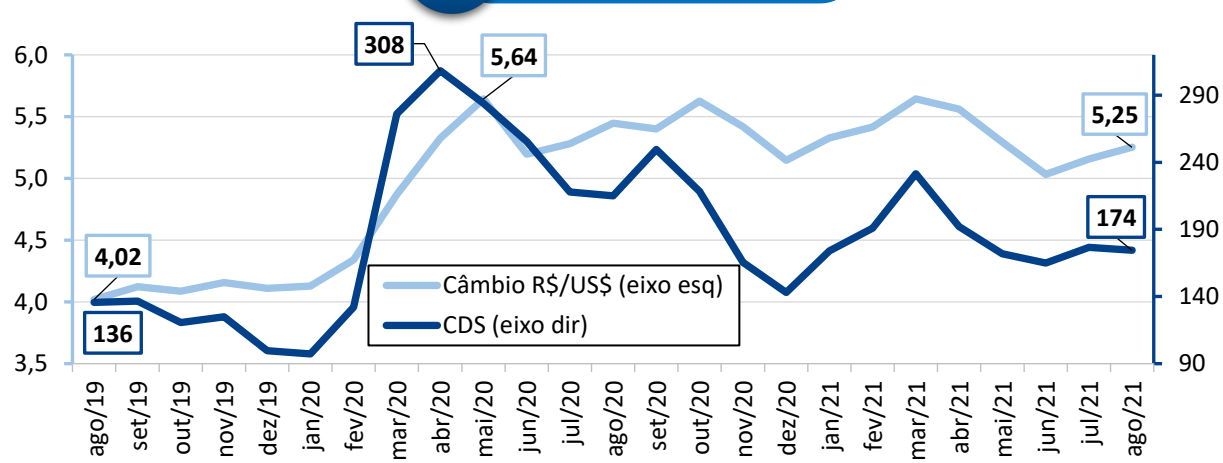
Fontes: IBGE e BCB - Elaboração: ANFAVEA

Curva de juros - ETTJ prefixada (% ao ano)



Fonte: ANBIMA - Elaboração: ANFAVEA

Câmbio e Risco



Fontes: Bloomberg e BCB - Elaboração: ANFAVEA

FOLHA DE S.PAULO

04/set/21

Piora da crise hídrica impacta planos de empresas e ameaça economia até 2022

Valor

03/set/21

Pressão de custos leva a queda de 1,3% na produção industrial

Dinheiro

02/set/21

Indústria opera 2,1% abaixo do nível do pré-pandemia, diz IBGE

ESTADÃO

22/ago/21

‘Tempestade perfeita’ derruba cenário de crescimento econômico para 2022

ESTADÃO

04/set/21

Incertezas no País dificultam política monetária, diz BC

Valor

03/set/21

Revisão de projeções incluirá “mais inflação” e “menos PIB”

G1

01/set/21

PIB em queda no 2º trimestre: entenda os motivos e veja 10 riscos que podem frear retomada

CORREIO
BRAZILIENSE

21/jul/21

Avanço da variante Delta pode limitar crescimento do PIB, avaliam especialistas