

07 / Janeiro / 2022



COLETIVA DE IMPRENSA

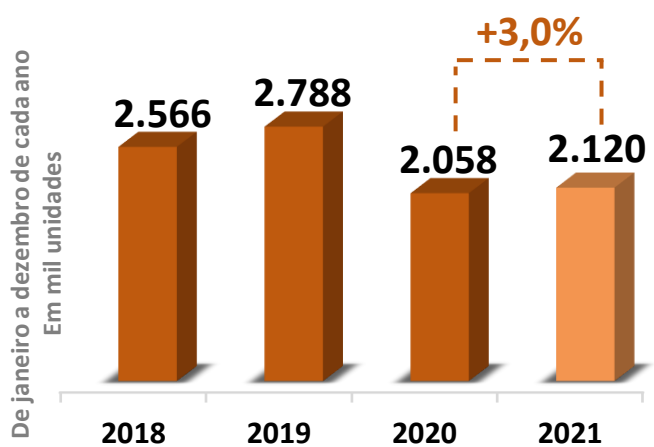
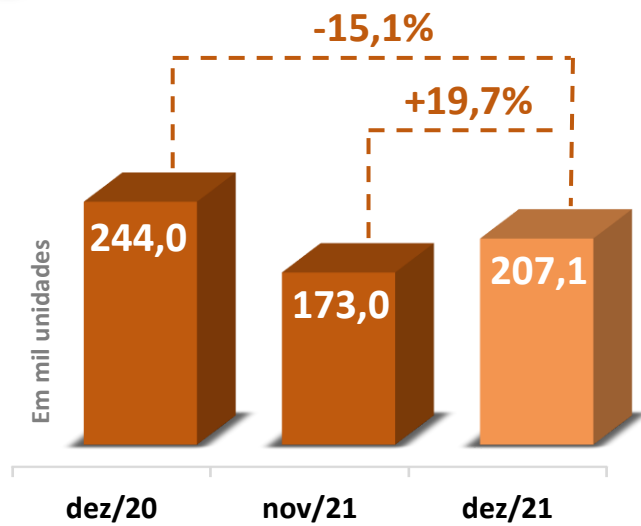
Desempenho da Indústria Automobilística Brasileira

RESULTADOS DO SETOR EM 2021 e PROJEÇÕES 2022

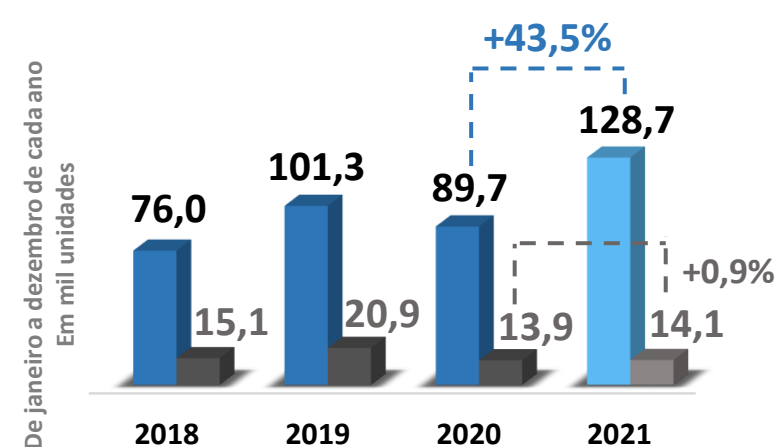
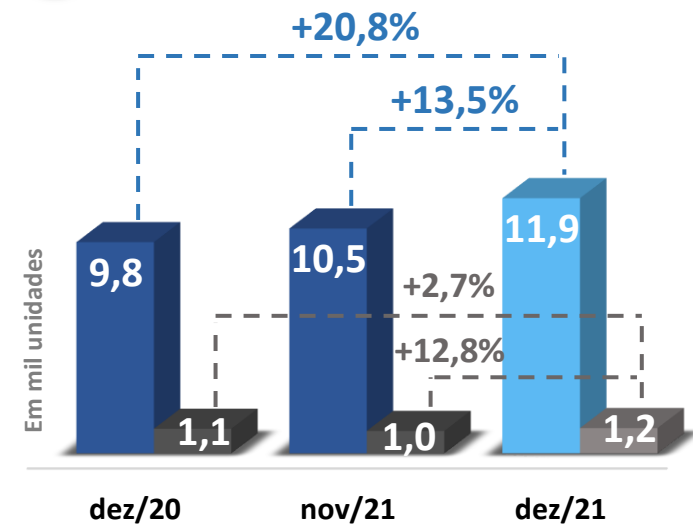


Mercado Interno

Autoveículos



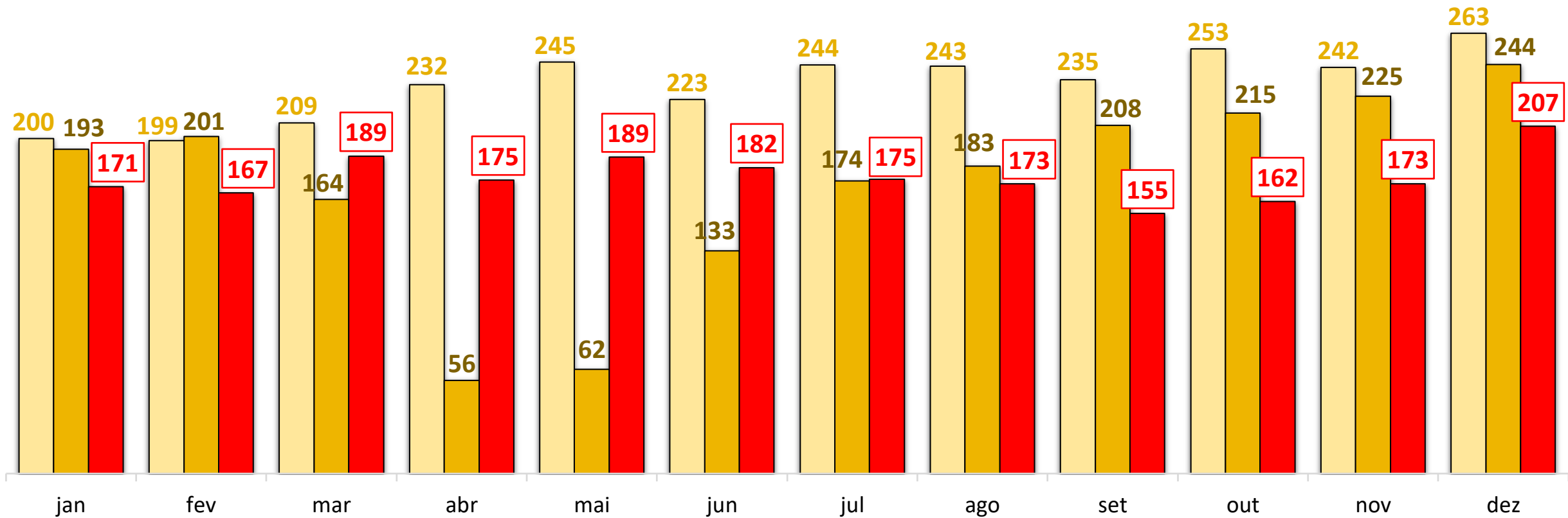
Caminhões e Ônibus



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

Licenciamento

2019 2020 2021

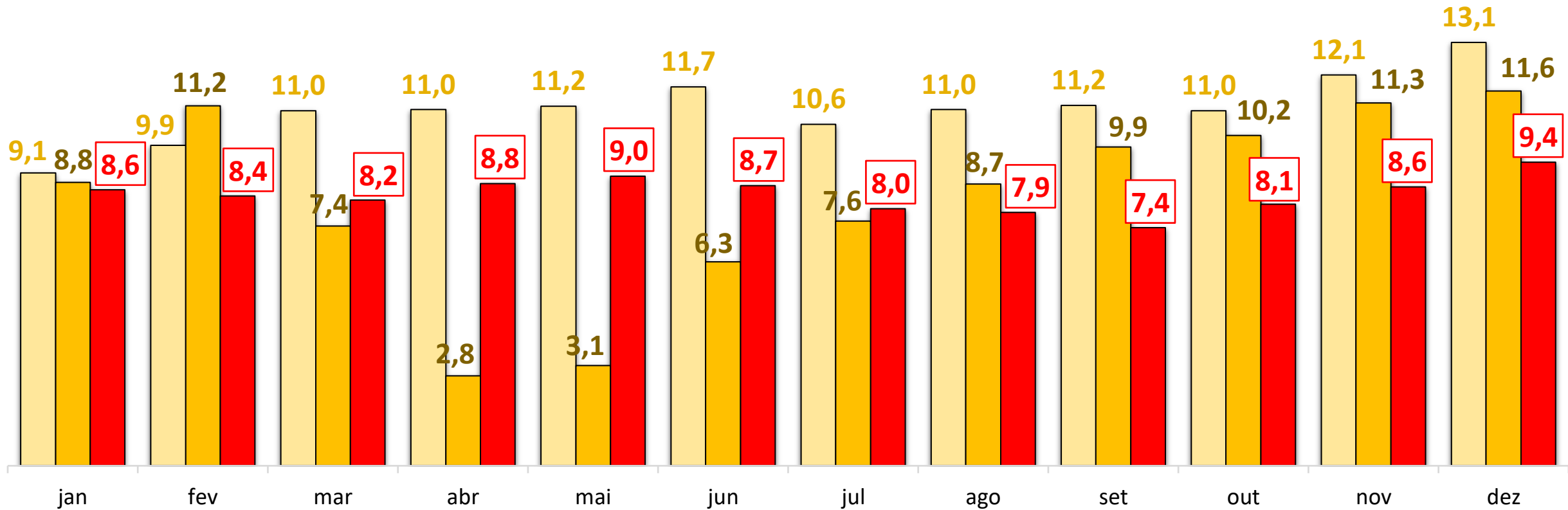


Comparativo 2019, 2020 e 2021 - Autoveículos (mil unidades)



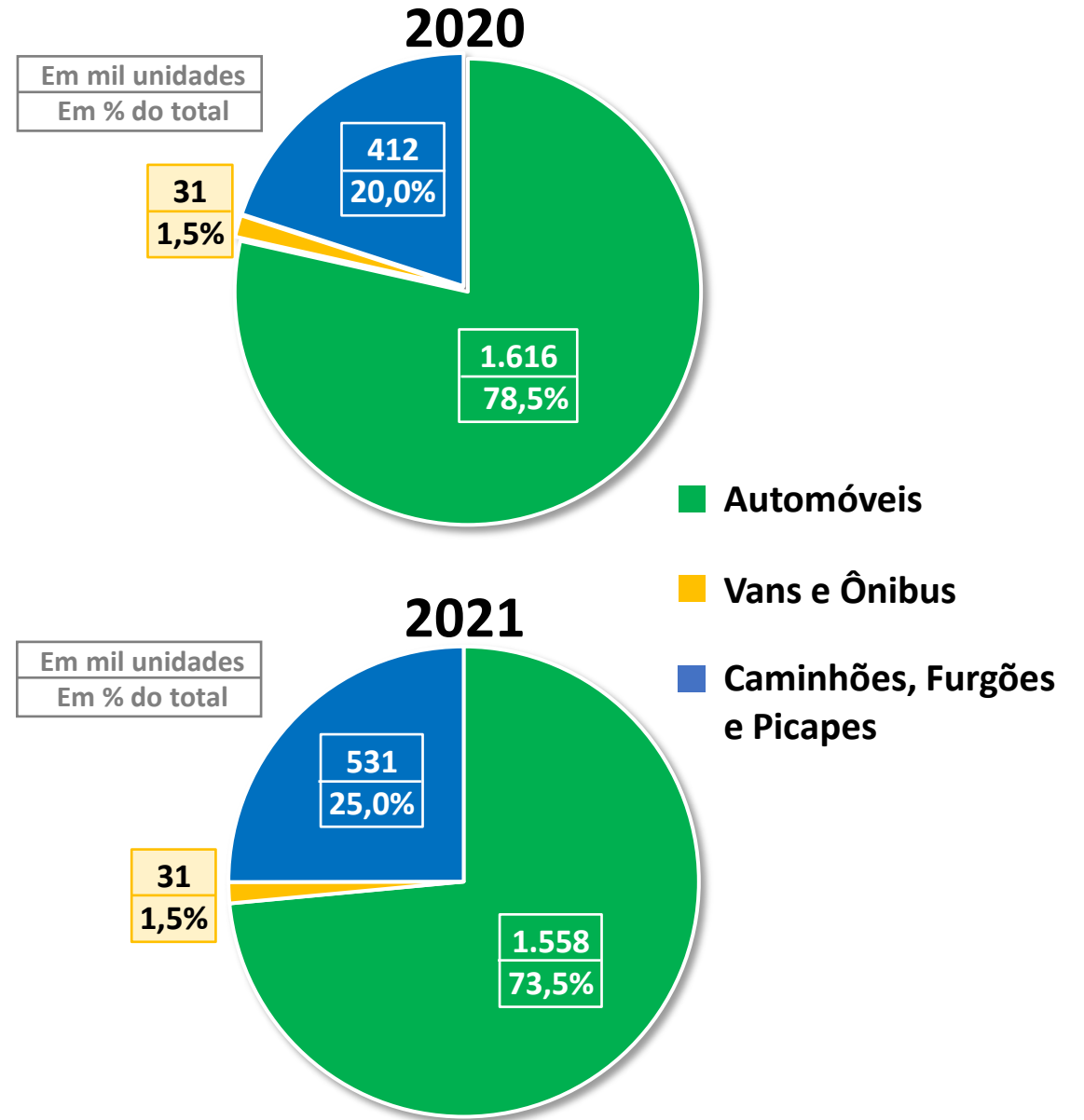
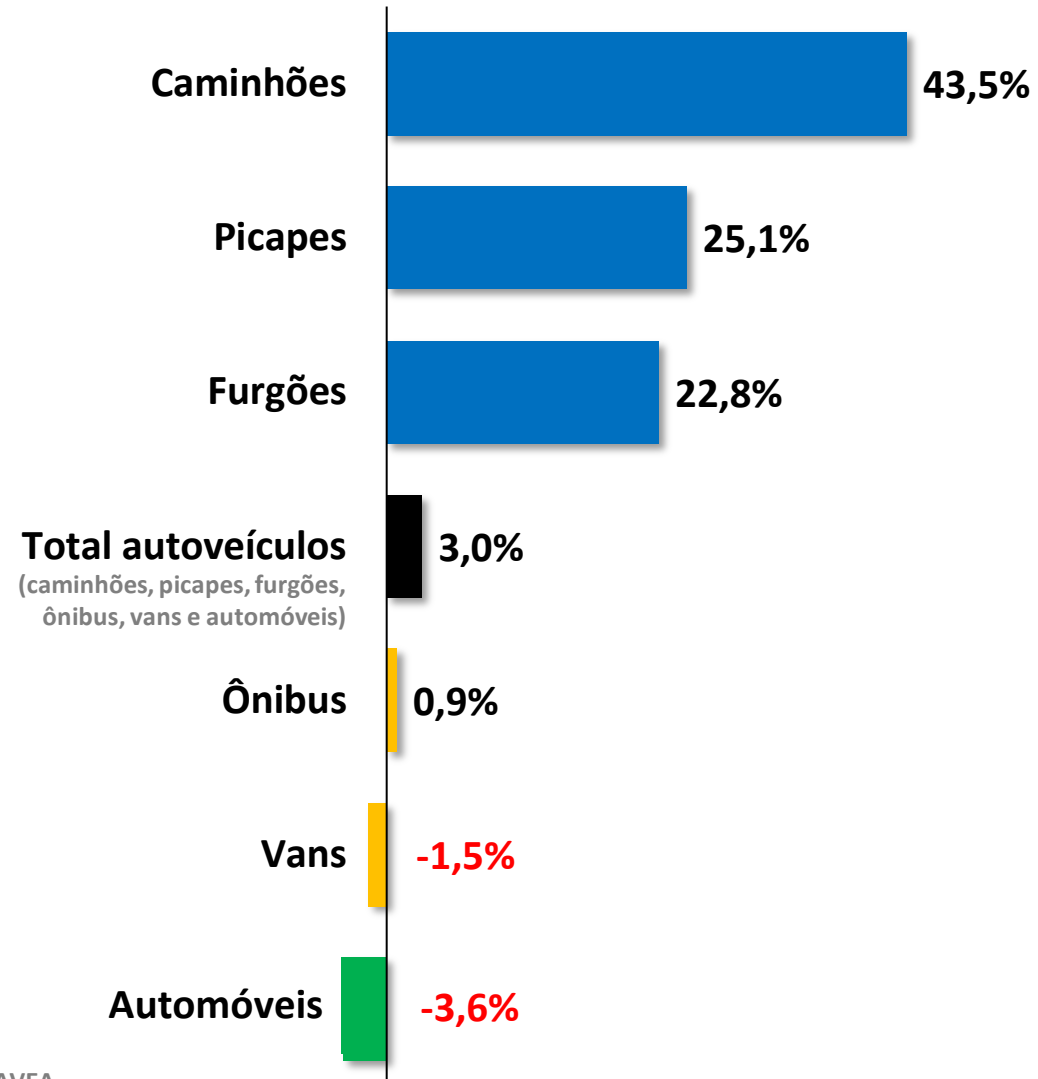
Licenciamento - Média diária

2019 2020 2021



Licenciamento de autoveículos

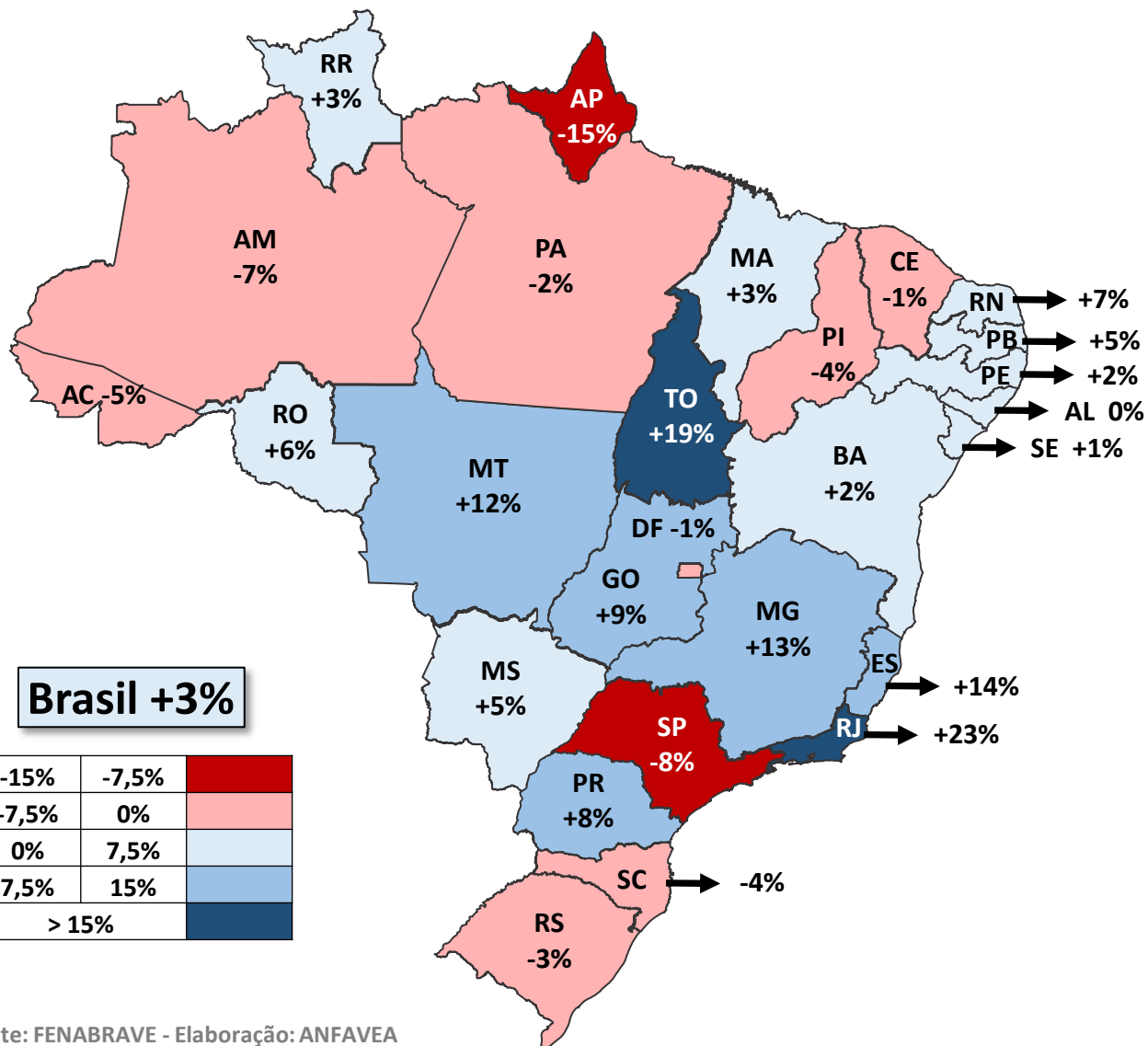
2021 sobre 2020



Licenciamento de Autoveículos Novos por Estado



Variação % Janeiro a Dezembro 2021 / Janeiro a Dezembro 2020

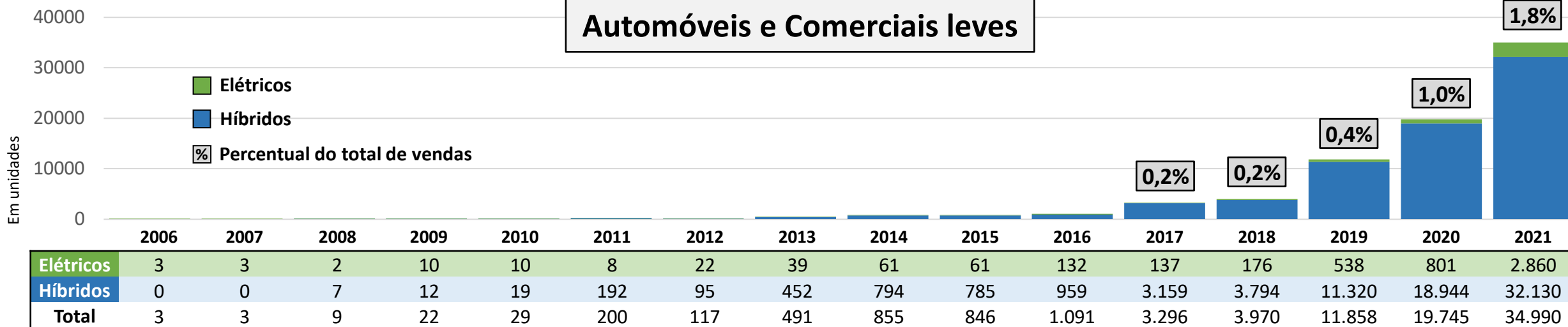


Estados	2020	2021	Variação %
AC	6.082	5.802	-5%
AL	20.196	20.198	0%
AM	30.412	28.265	-7%
AP	8.048	6.878	-15%
BA	77.121	78.458	2%
CE	46.668	46.389	-1%
DF	66.553	66.036	-1%
ES	37.765	43.094	14%
GO	75.925	82.712	9%
MA	30.454	31.349	3%
MG	405.608	456.607	13%
MS	29.314	30.703	5%
MT	44.676	49.860	12%
PA	45.935	45.074	-2%
PB	25.750	27.046	5%
PE	62.975	64.096	2%
PI	18.641	17.851	-4%
PR	144.357	155.459	8%
RJ	93.411	115.155	23%
RN	18.918	20.272	7%
RO	18.937	20.063	6%
RR	6.088	6.265	3%
RS	112.299	109.246	-3%
SC	113.977	108.992	-4%
SE	14.751	14.891	1%
SP	490.621	453.637	-8%
TO	12.955	15.453	19%
Total	2.058.437	2.119.851	3%

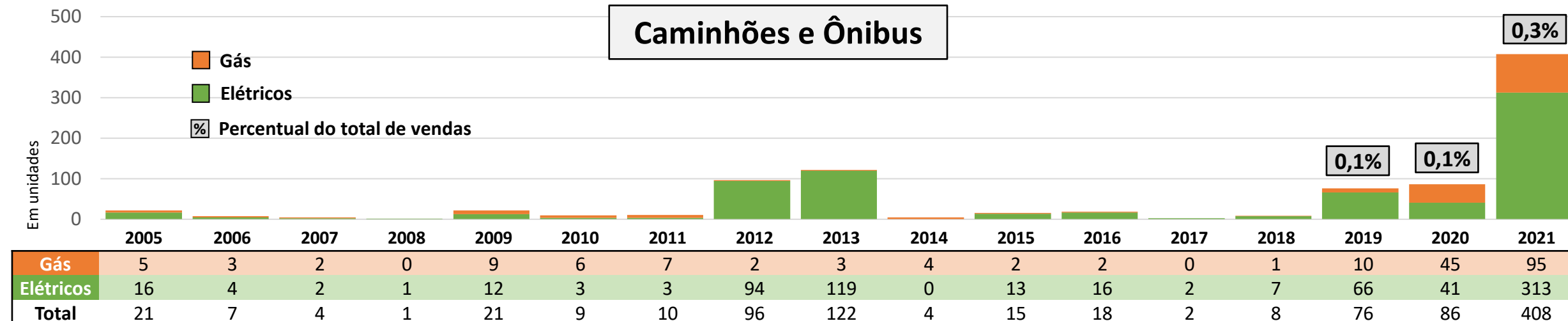
Licenciamento de autoveículos - **Novas tecnologias de propulsão**



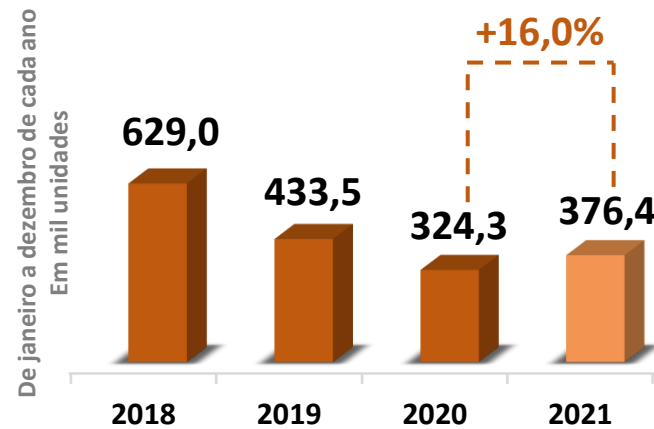
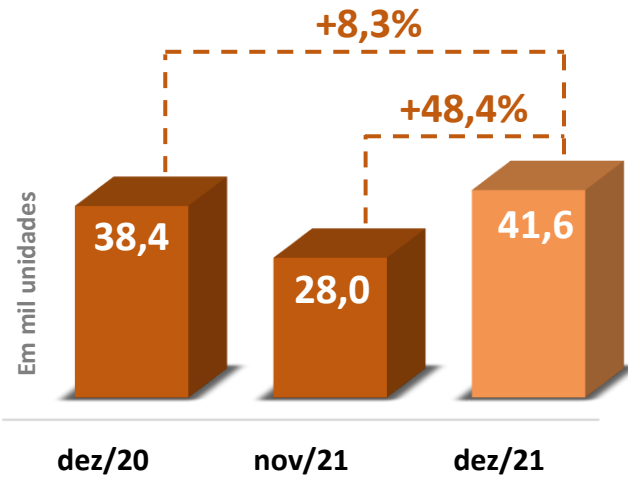
Automóveis e Comerciais leves



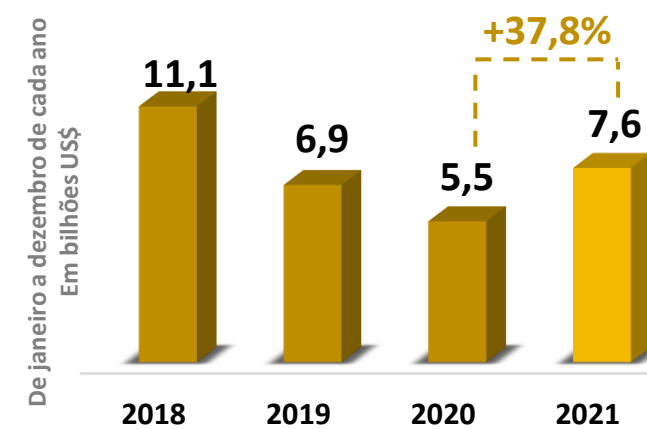
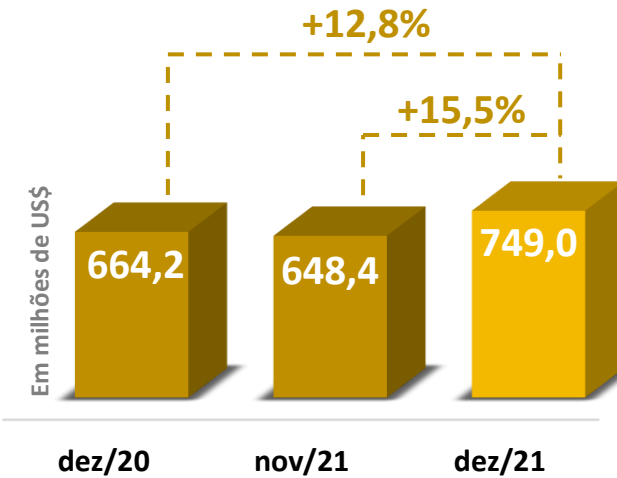
Caminhões e Ônibus



Autoveículos



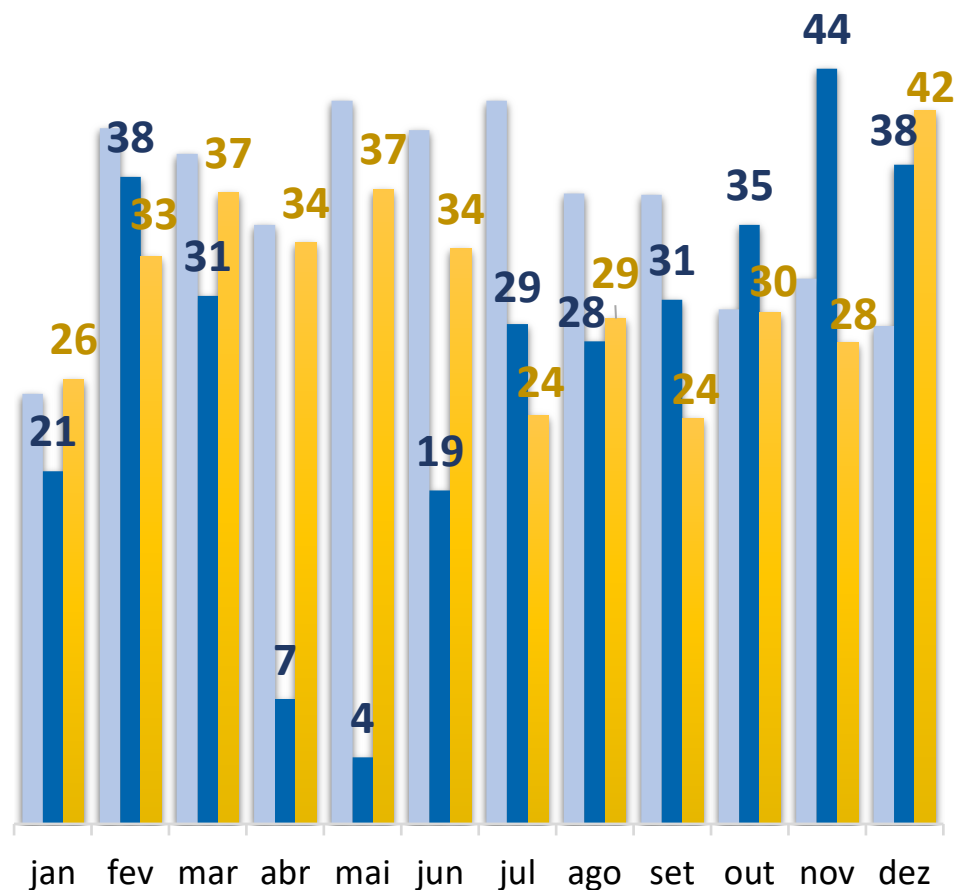
Exportações em valor Autoveículos



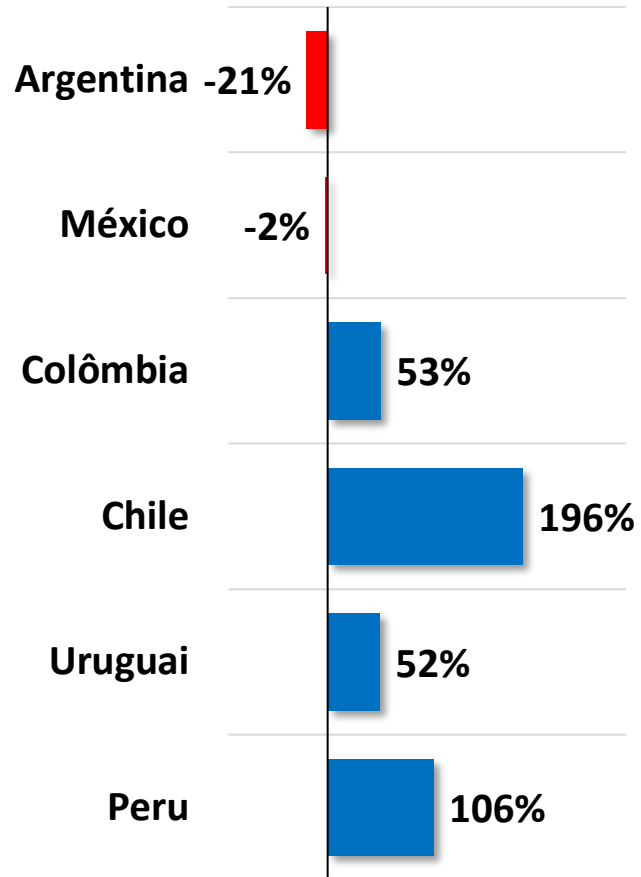
Comparativo 2019, 2020 e 2021 - Autoveículos

Exportações (mil unidades)

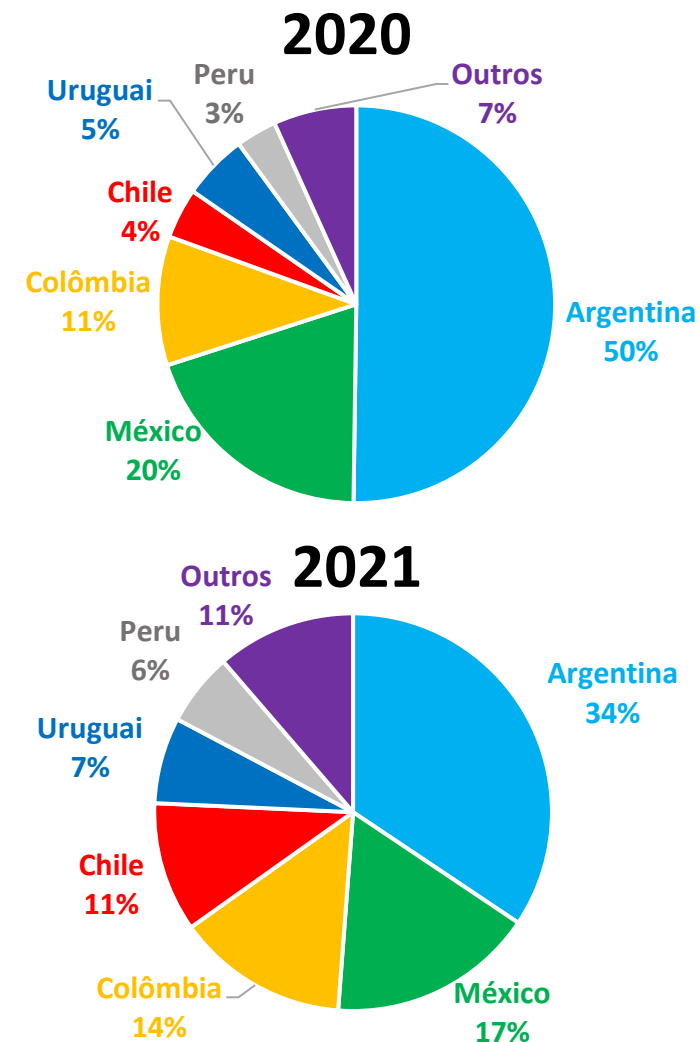
■ 2019 ■ 2020 ■ 2021



Países de Destino (variação %)

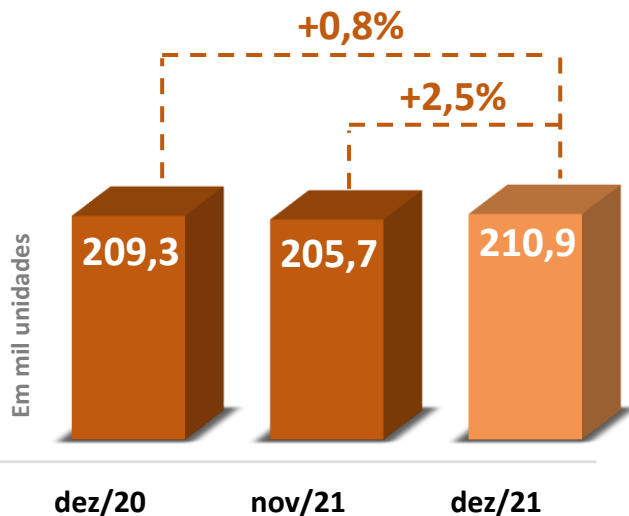


Participação nas Exportações (% do total)

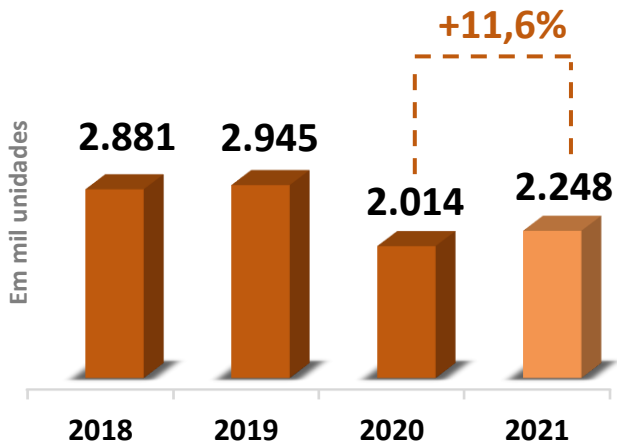




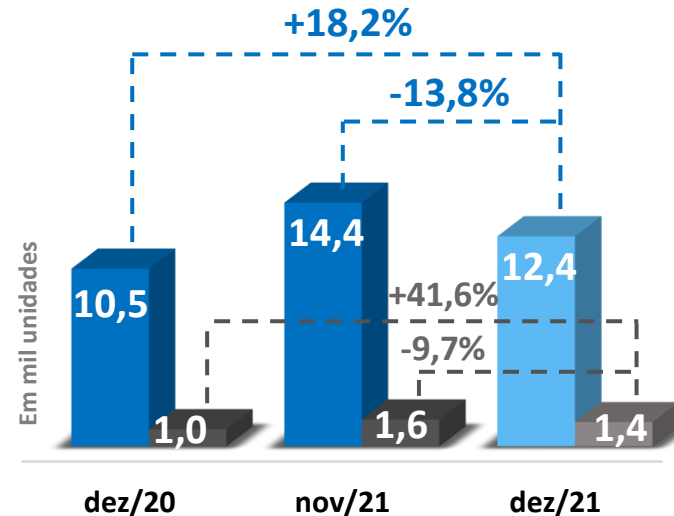
Autoveículos



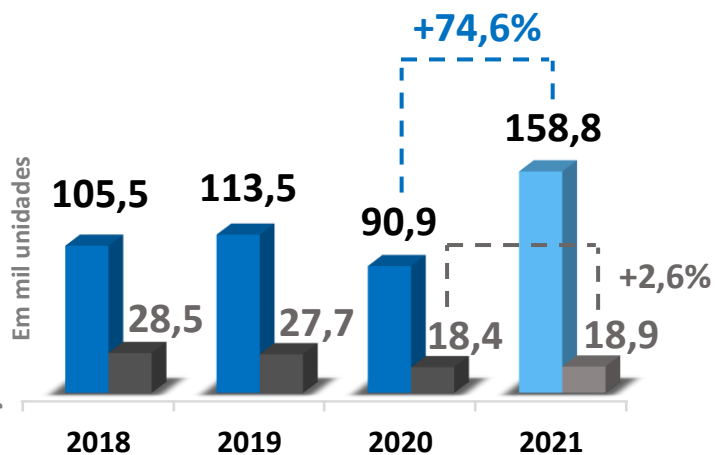
De janeiro a dezembro de cada ano



Caminhões e Ônibus

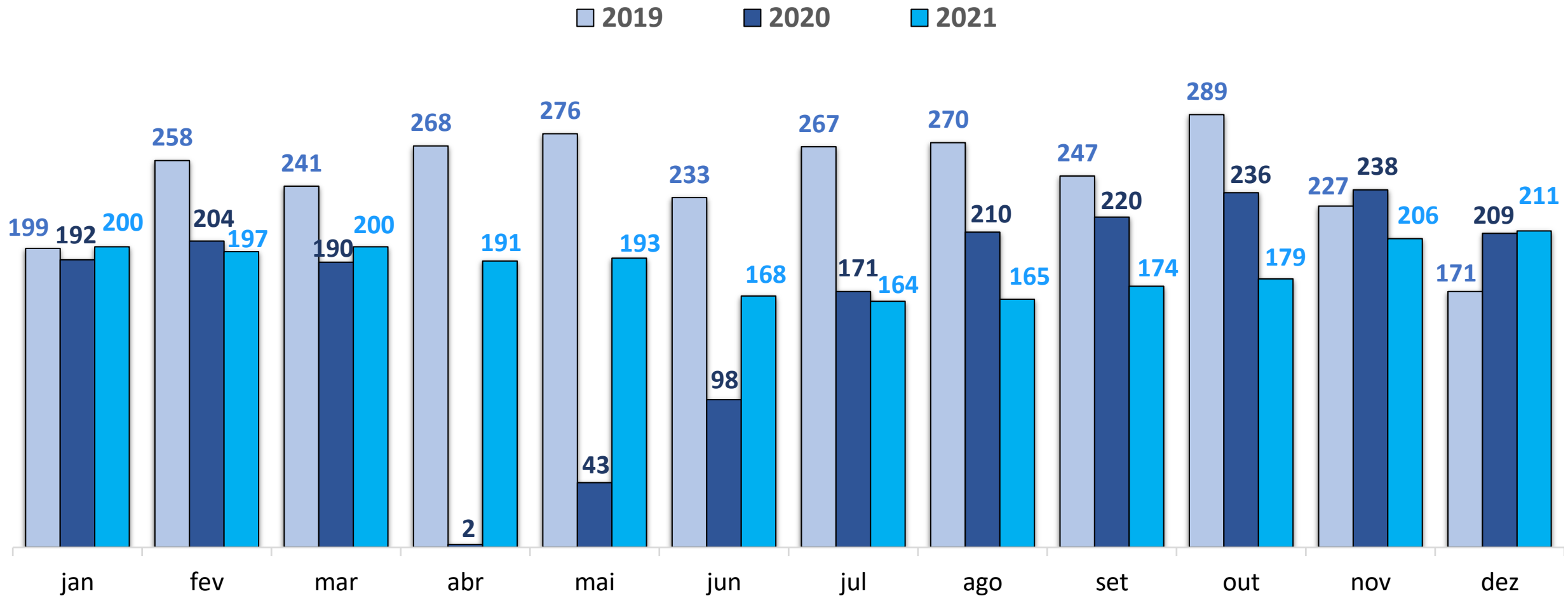


De janeiro a dezembro de cada ano



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

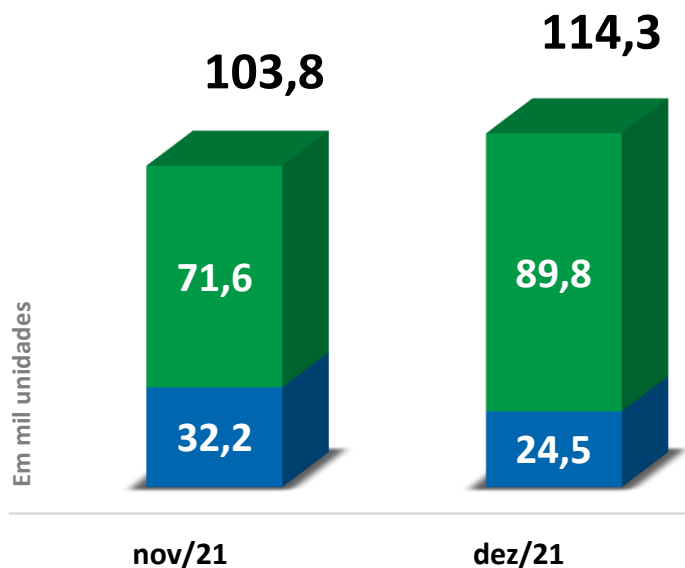
Produção



Estoque de Autoveículos



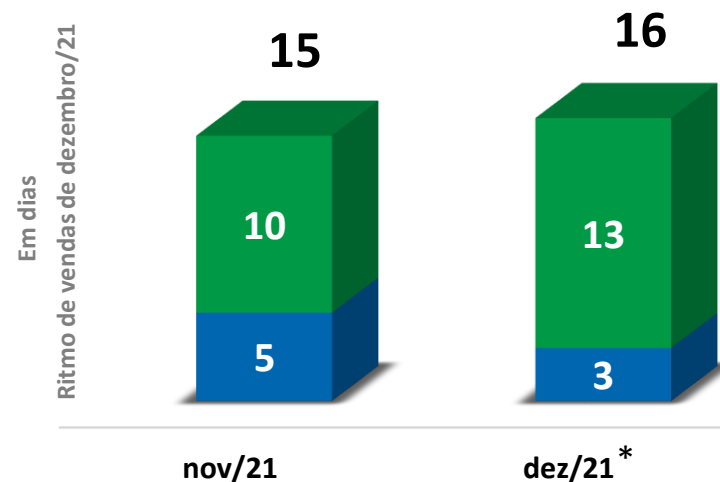
Quantidade



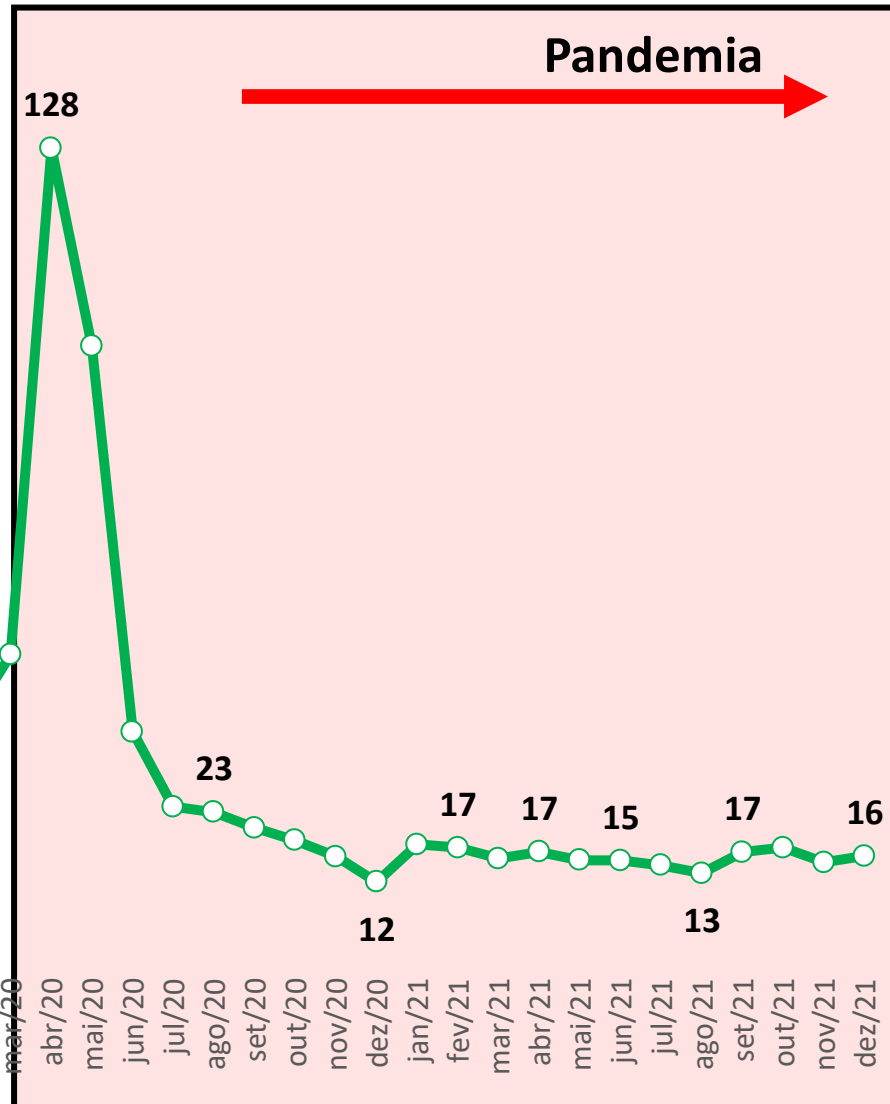
- Nas concessionárias
- Nas fábricas (mercado interno)



Dias de estoque

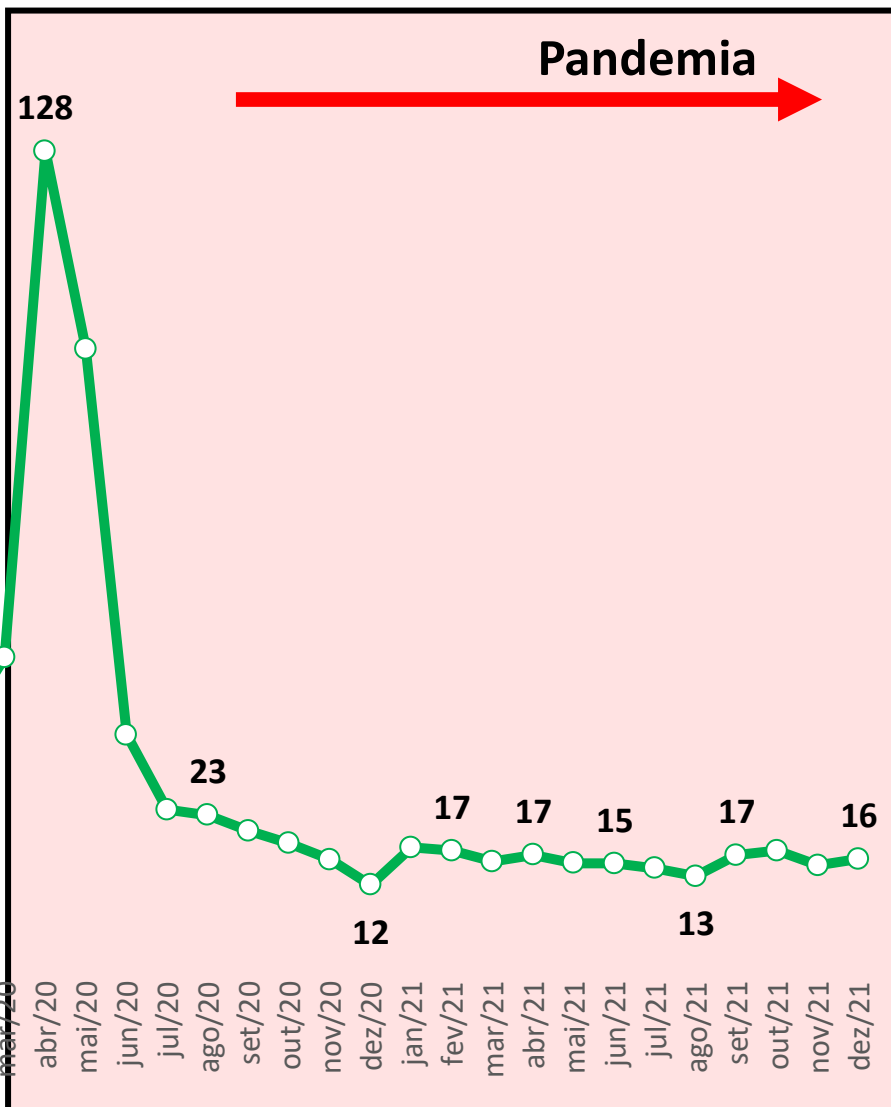


Dias de estoque – BRASIL

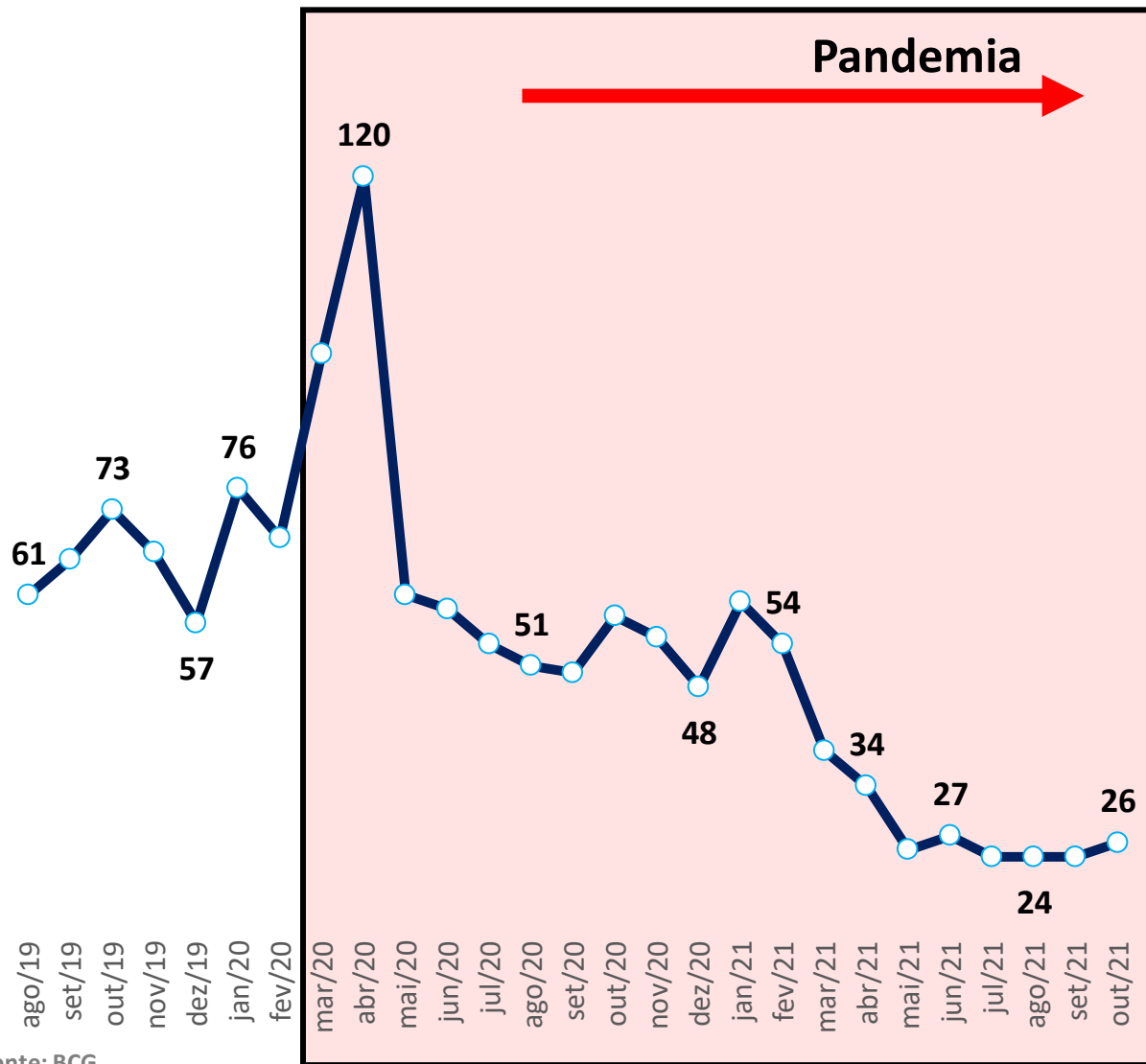


Estoque de Autoveículos

Dias de estoque – BRASIL



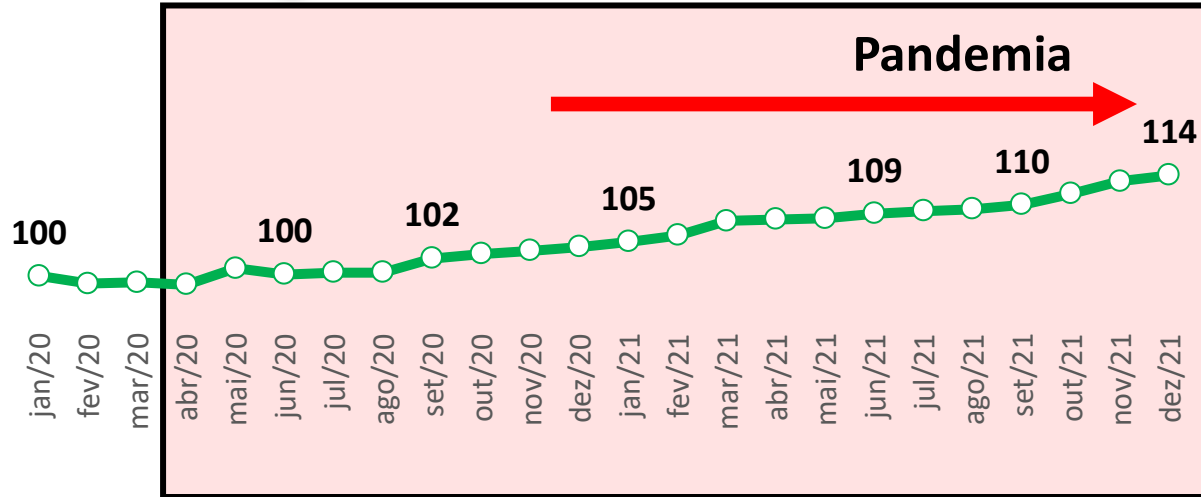
Dias de estoque – EUA



Preços (jan 2020 = 100)

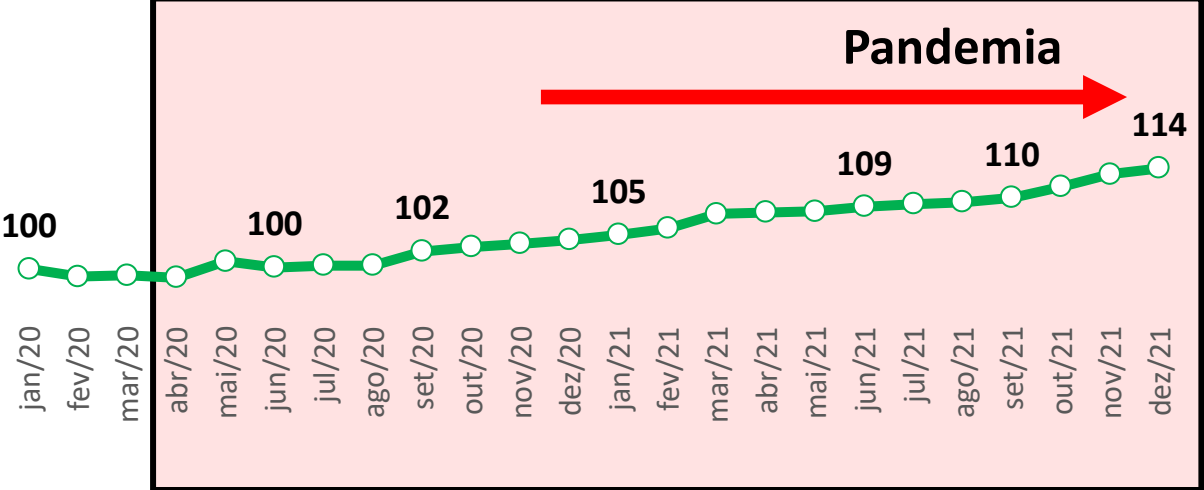


Variação dos preços BRASIL / NOVOS

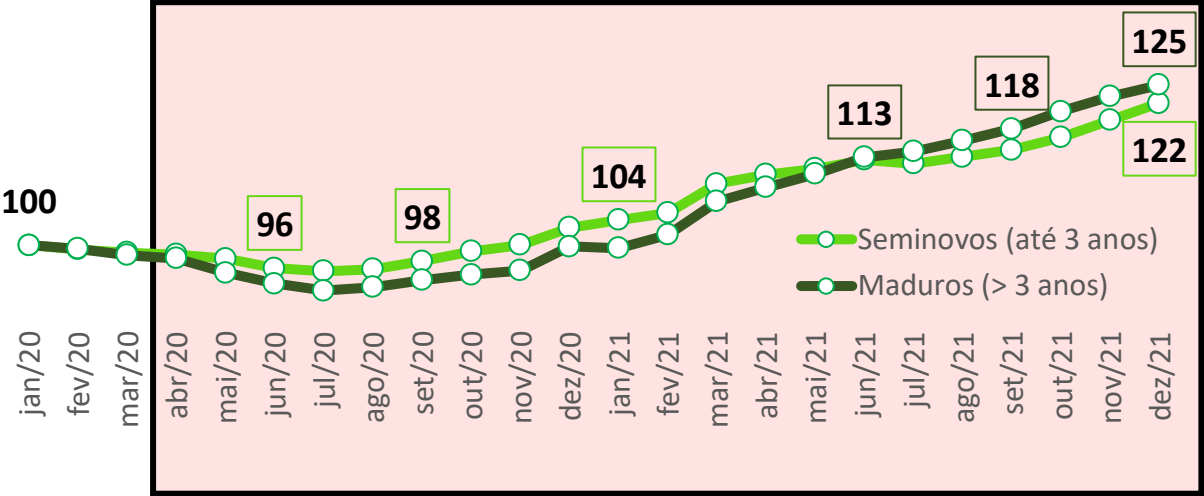


Preços (jan 2020 = 100)

Varição dos preços BRASIL / NOVOS

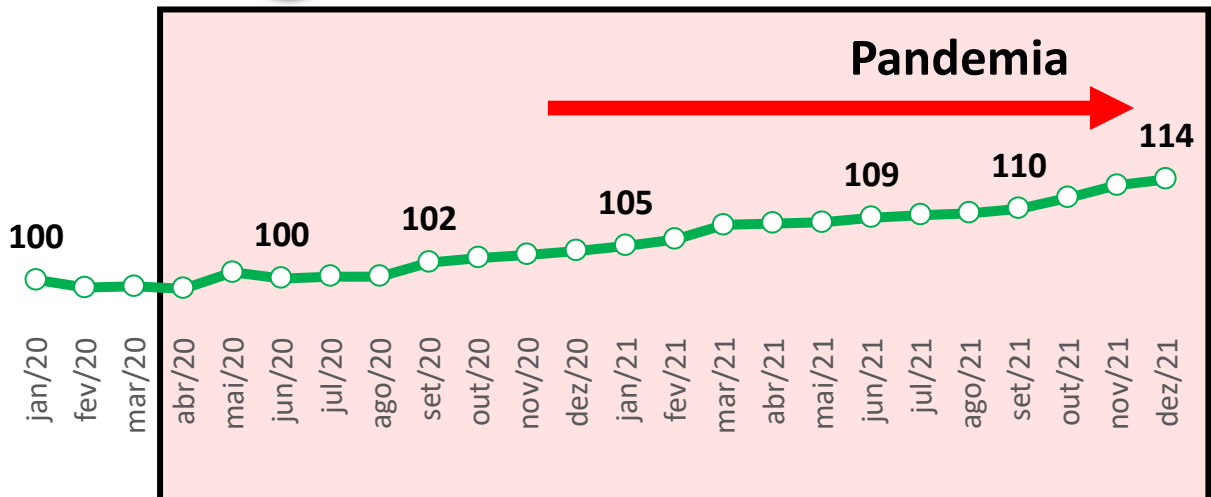


Varição dos preços BRASIL / USADOS

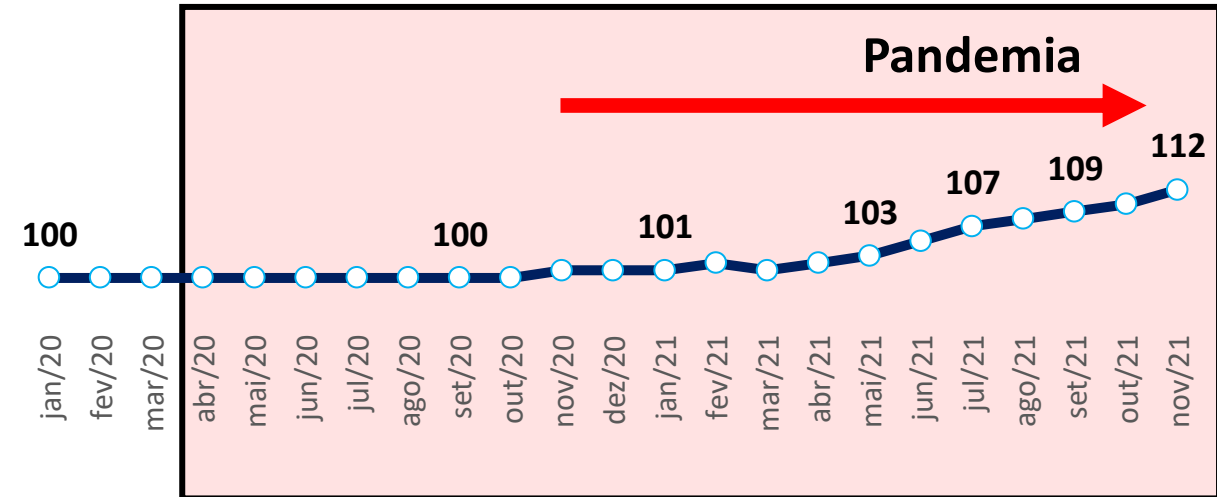


Preços (jan 2020 = 100)

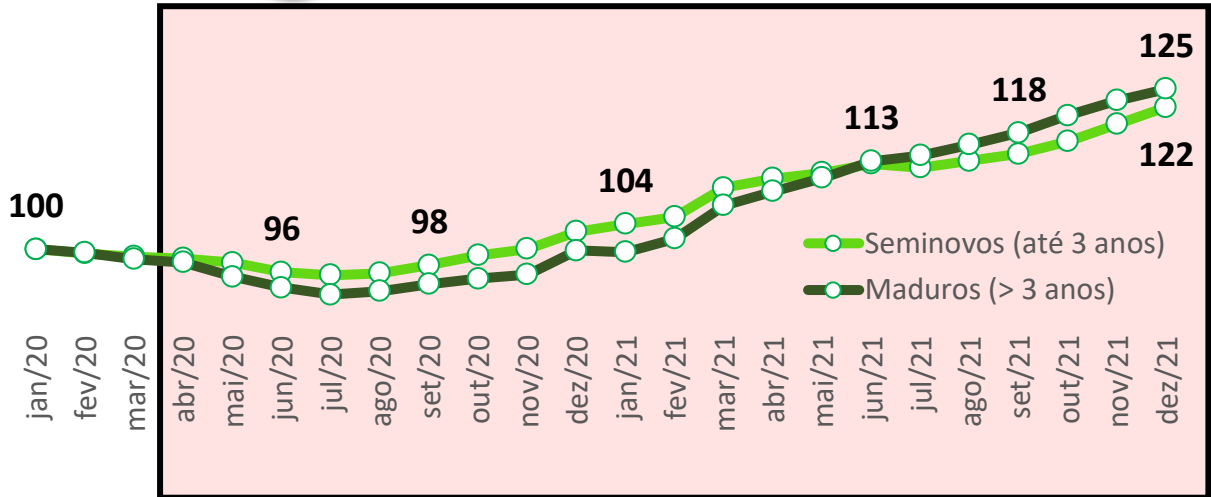
Variação dos preços BRASIL / NOVOS



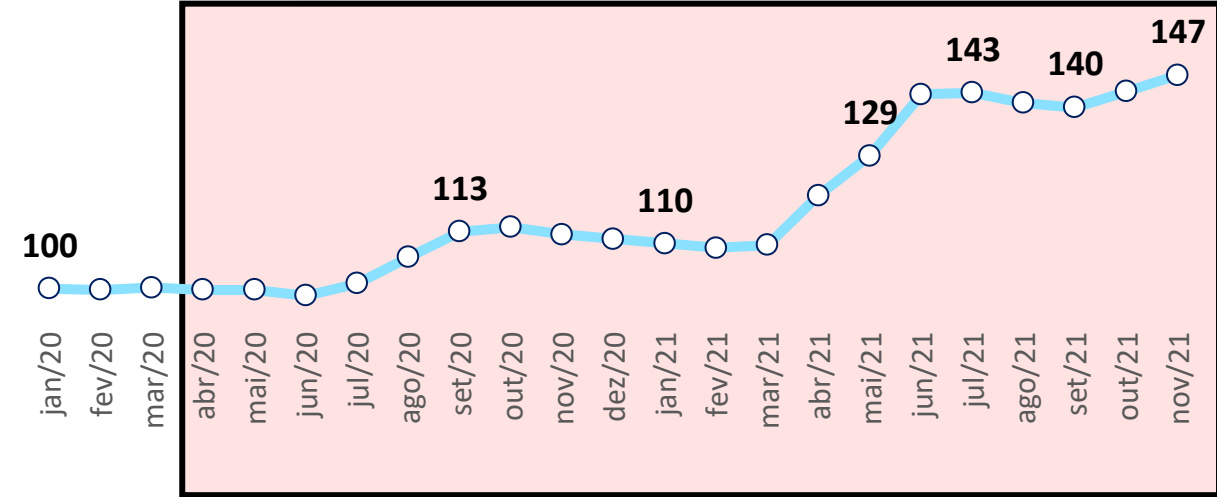
Variação dos preços EUA / NOVOS



Variação dos preços BRASIL / USADOS



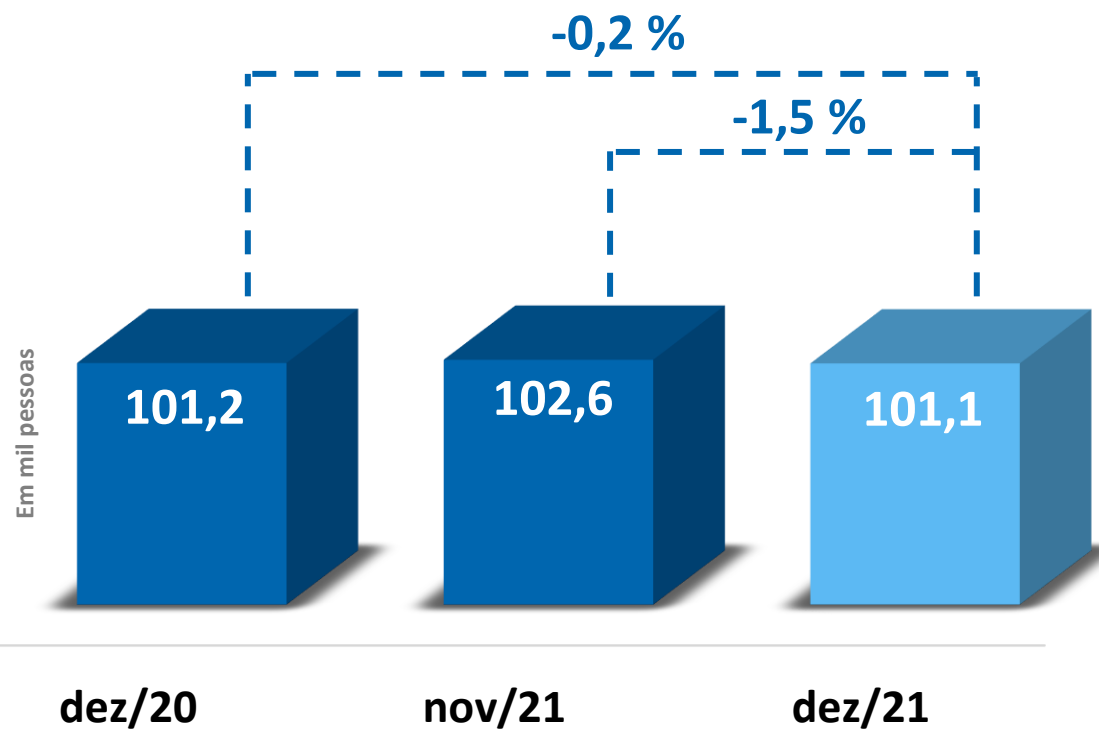
Variação dos preços EUA / USADOS



Fonte: KBB Brasil


Fonte: Federal Reserve Bank of St. Louis

Emprego Autoveículos - Funcionários diretos



Resultados 2021













Licenciamento - Principais mercados (mil unidades)

	<u>2019</u>	<u>2020</u>	<u>2021</u>
 Argentina	460	343	382
 México	1.318	950	1.015
 Itália	1.917	1.381	1.458
 China	25.796	25.291	26.280*
 Estados Unidos	16.961	14.581	15.079
 Brasil	2.788	2.058	2.120
 Reino Unido	2.311	1.631	1.647
 Espanha	1.258	851	860
 França	2.214	1.650	1.659
 Japão	5.195	4.599	4.445
 Alemanha	3.607	2.918	2.620
 Coreia do Sul	1.497	1.618	1.443













Licenciamento - Principais mercados (mil unidades)

	<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>2020 X 2019</u>
 Argentina	460	343	382	-25%
 México	1.318	950	1.015	-28%
 Itália	1.917	1.381	1.458	-28%
 China	25.796	25.291	26.280*	-2%
 Estados Unidos	16.961	14.581	15.079	-14%
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 Espanha	1.258	851	860	-32%
 França	2.214	1.650	1.659	-25%
 Japão	5.195	4.599	4.445	-11%
 Alemanha	3.607	2.918	2.620	-19%
 Coreia do Sul	1.497	1.618	1.443	8%

Licenciamento - Principais mercados (mil unidades)

	<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>2020 X 2019</u>	<u>2021 X 2019</u>
 Argentina	460	343	382	-25%	-17%
 México	1.318	950	1.015	-28%	-23%
 Itália	1.917	1.381	1.458	-28%	-24%
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 Alemanha	3.607	2.918	2.620	-19%	-27%
 Coreia do Sul	1.497	1.618	1.443	8%	-4%

Licenciamento - Principais mercados (mil unidades)

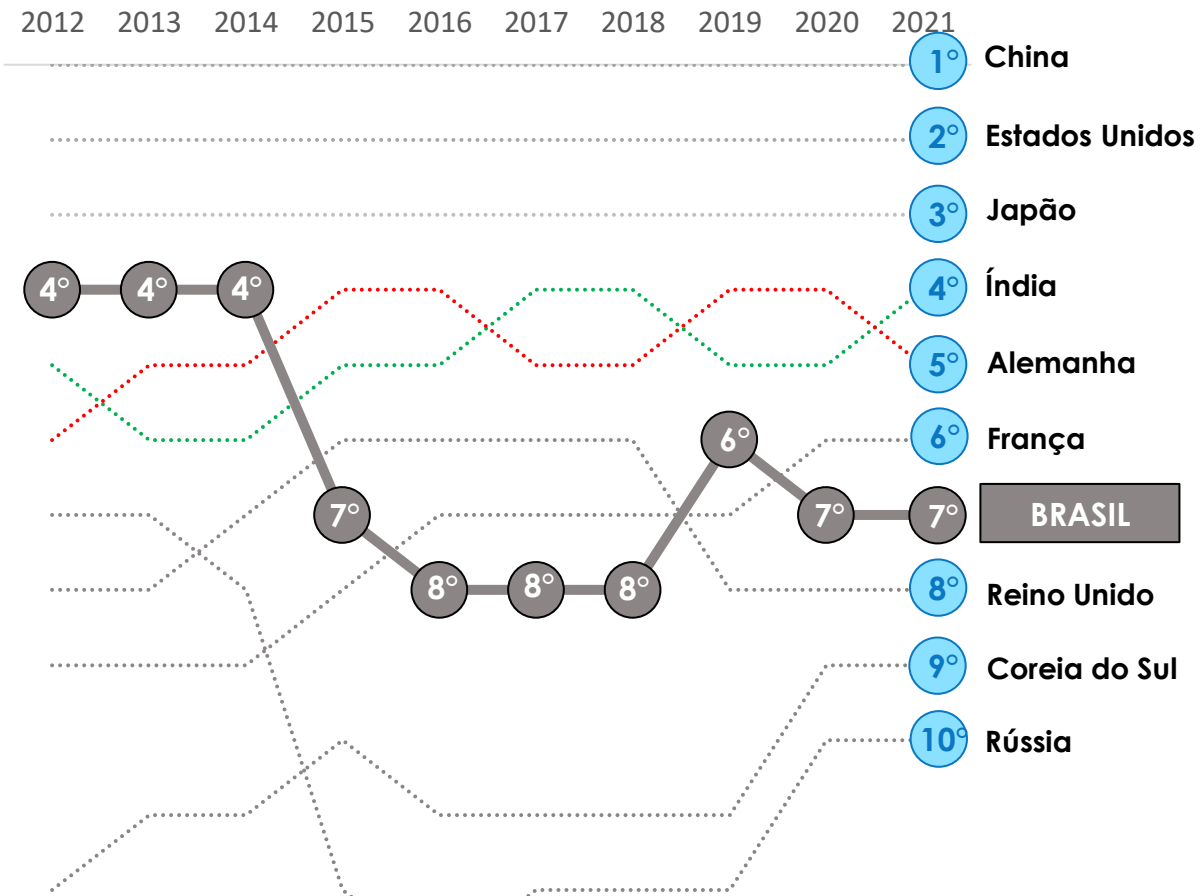
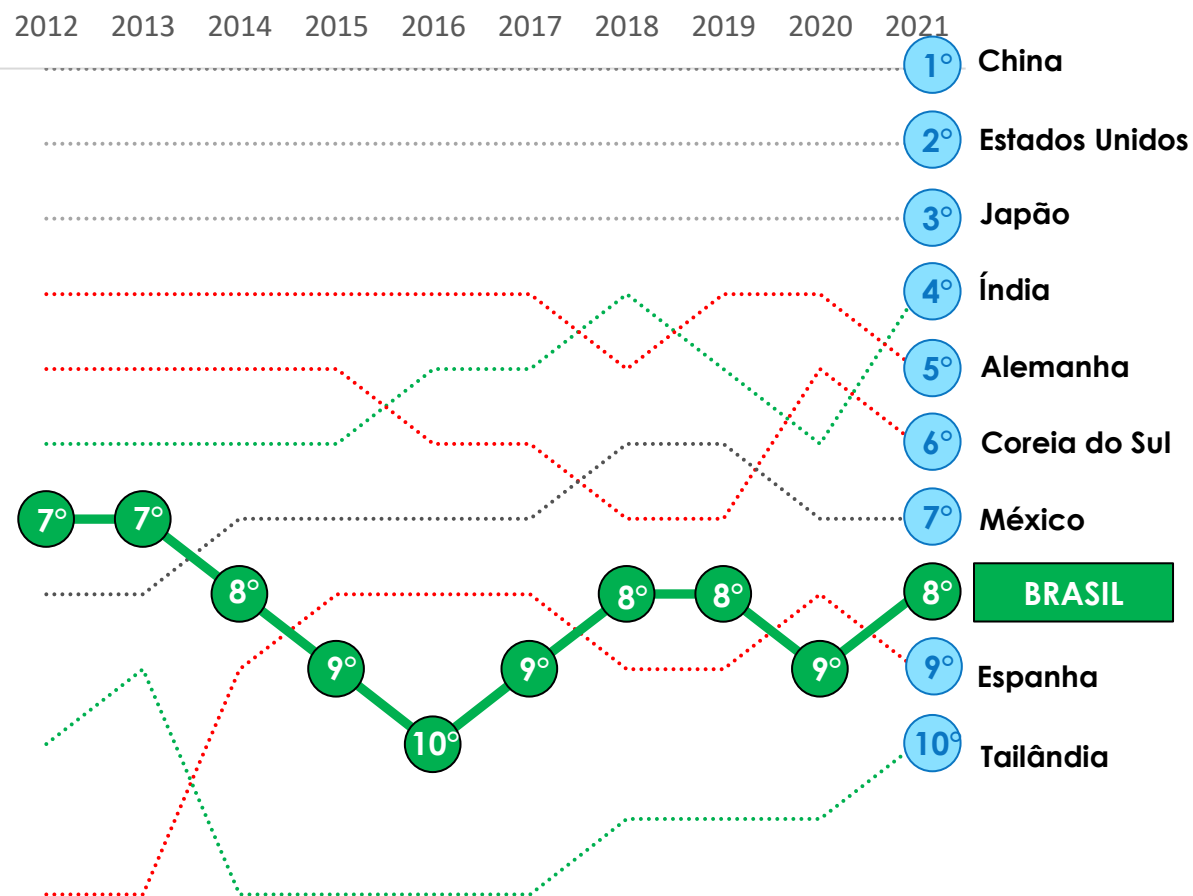
	<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>2020 X 2019</u>	<u>2021 X 2019</u>	<u>2021 X 2020</u>
 Argentina	460	343	382	-25%	-17%	12%
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 China	25.796	25.291	26.280*	-2%	2%	4%*
 Estados Unidos	16.961	14.581	15.079	-14%	-11%	3%
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 Espanha	1.258	851	860	-32%	-32%	1%
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 Japão	5.195	4.599	4.445	-11%	-14%	-3%
 Alemanha	3.607	2.918	2.620	-19%	-27%	-10%
 Coreia do Sul	1.497	1.618	1.443	8%	-4%	-11%

Ranking Mundial de Autoveículos de 2012 a 2021

Produção

Dados preliminares para 2021

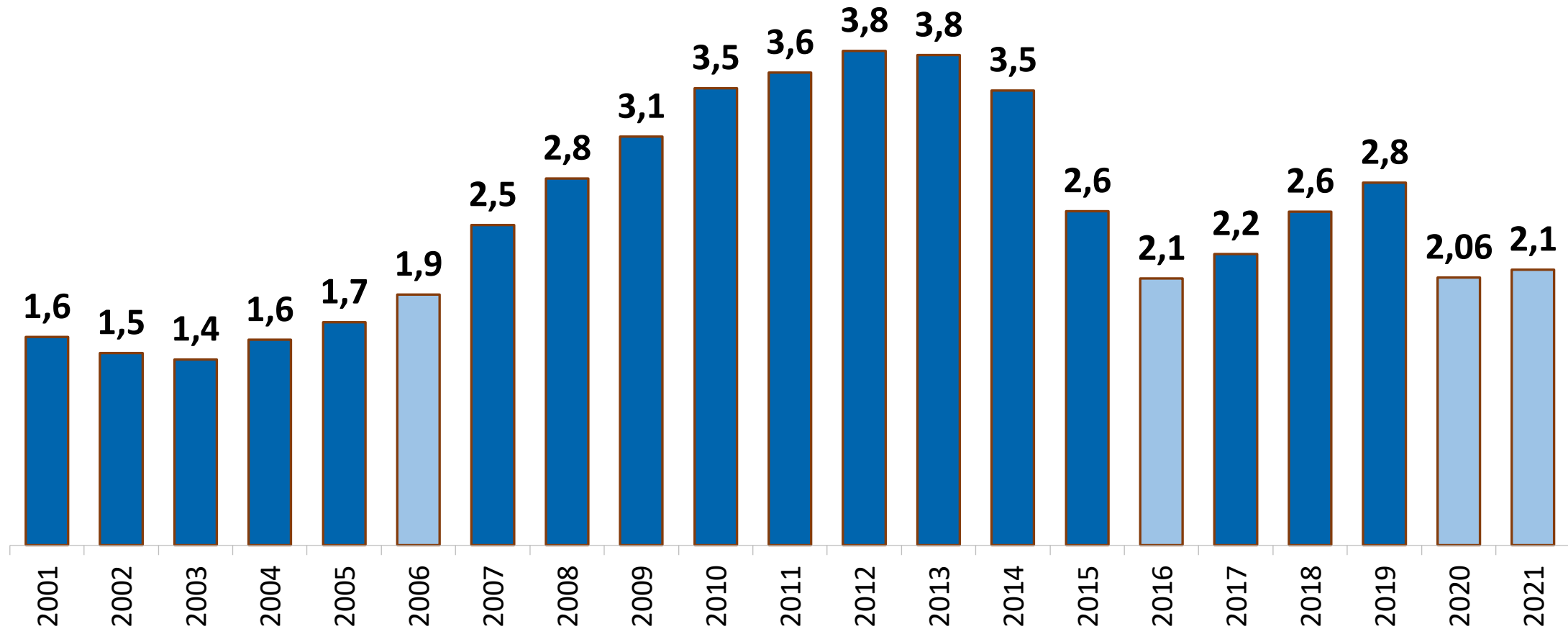
Licenciamento



Desempenho do Mercado de **Autoveículos de 2001 a 2021**



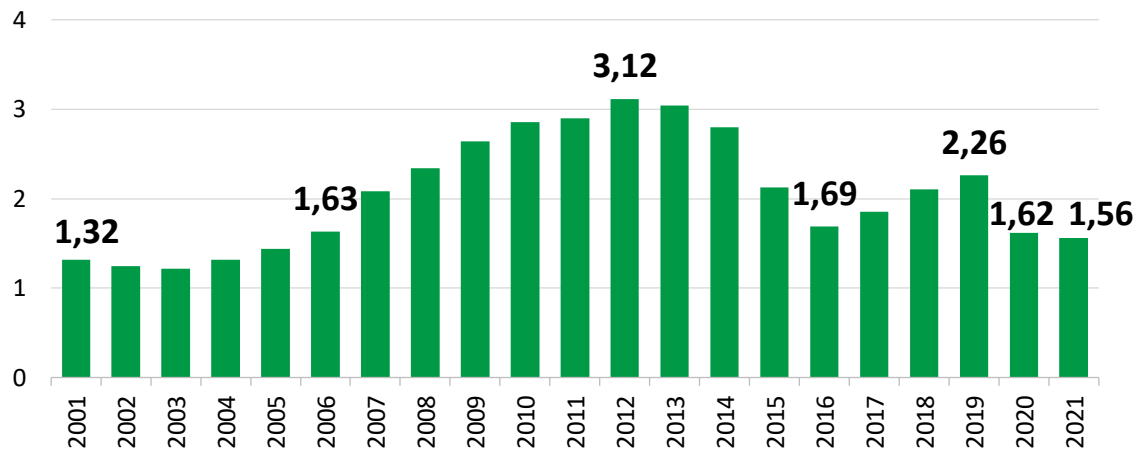
Autoveículos (mil unidades)



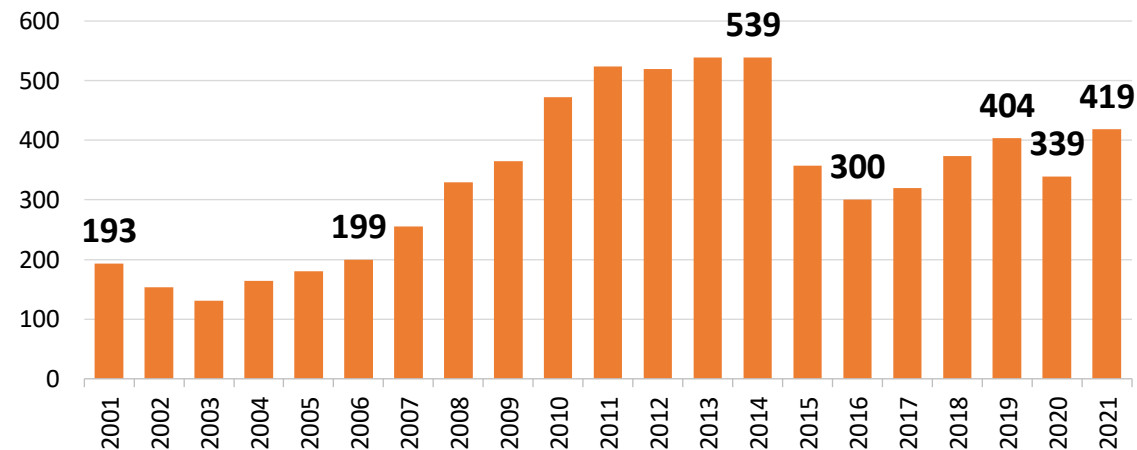
Desempenho do Mercado de Autoveículos de 2001 a 2021



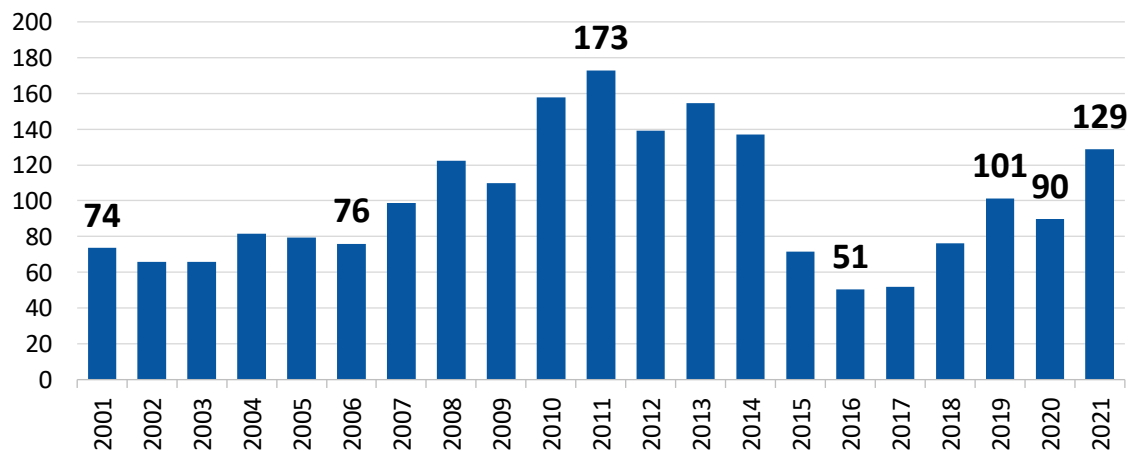
Automóveis (milhões de unidades)



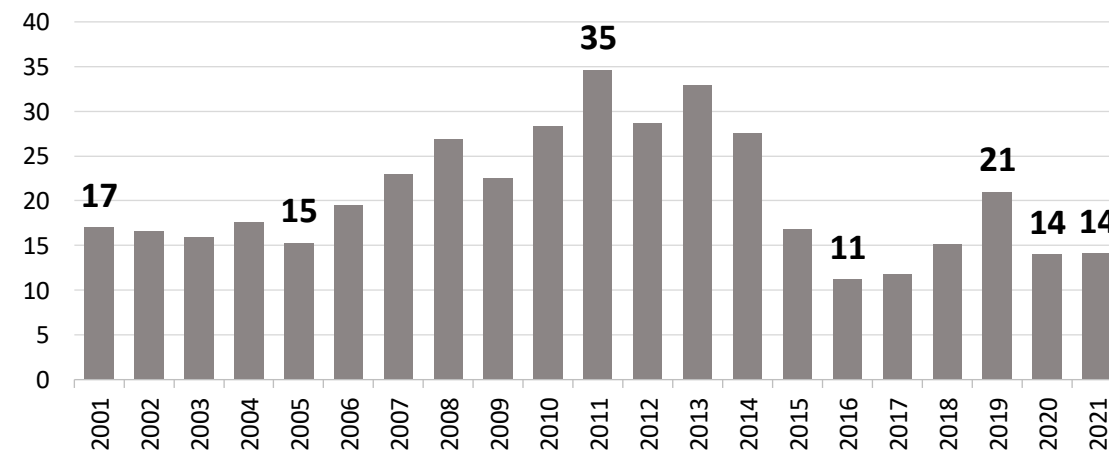
Comerciais Leves (mil unidades)



Caminhões (mil unidades)



Ônibus (mil unidades)



Projeções 2022

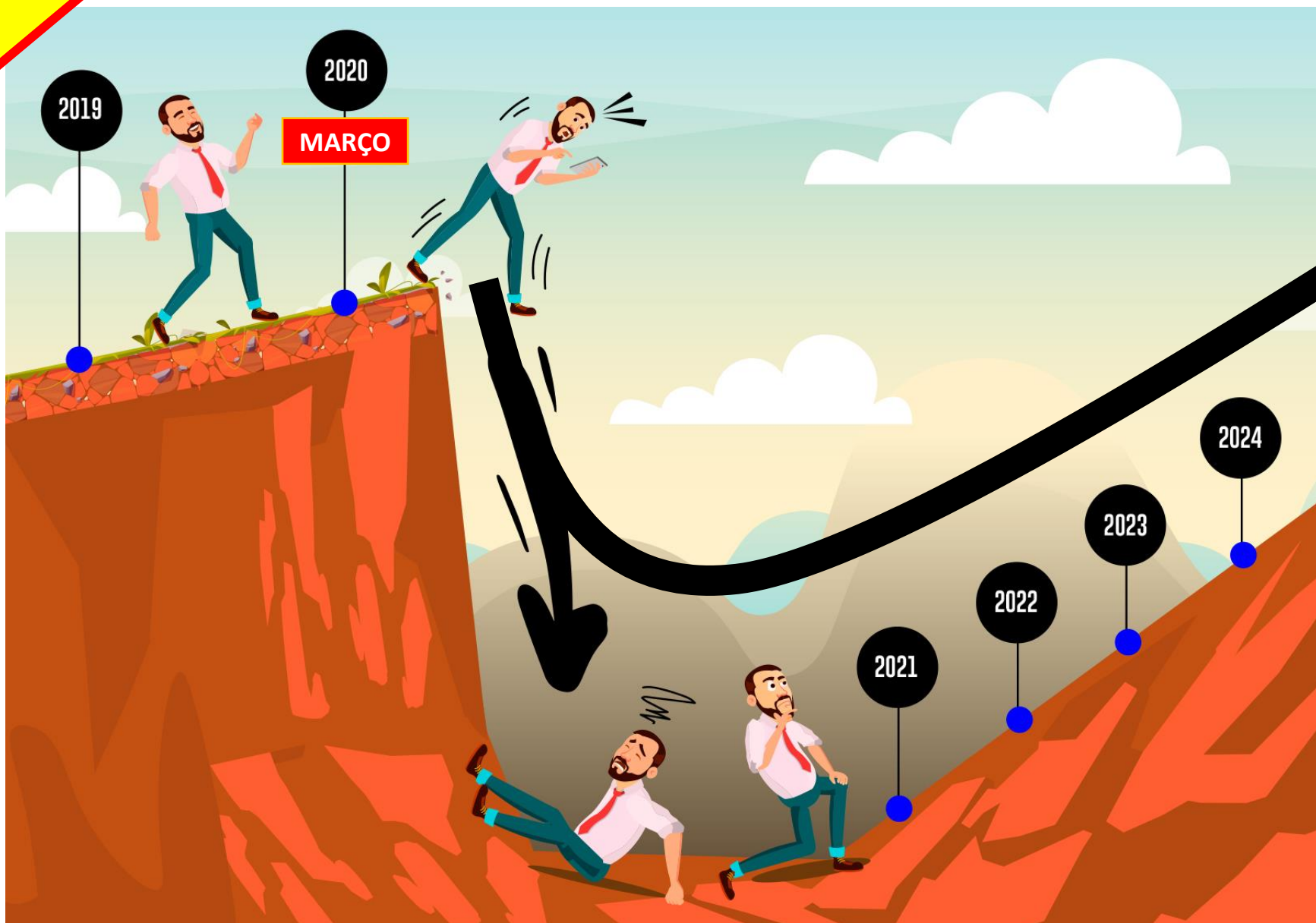
O Tombo Inesperado e o Desafio da Retomada

EXPECTATIVA
SET/2020



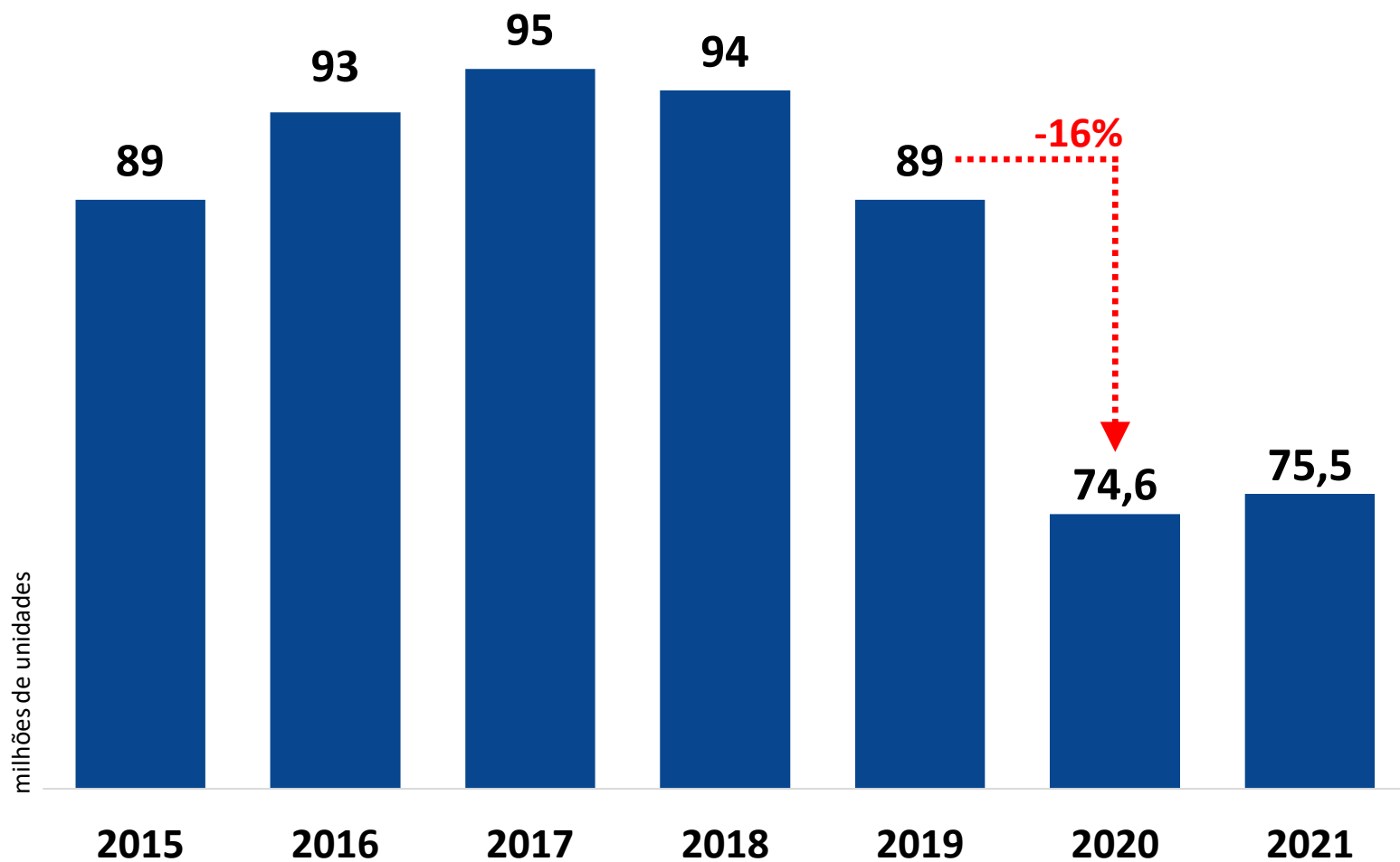
O Tombo Inesperado e o Desafio da Retomada

EXPECTATIVA
SET/2020



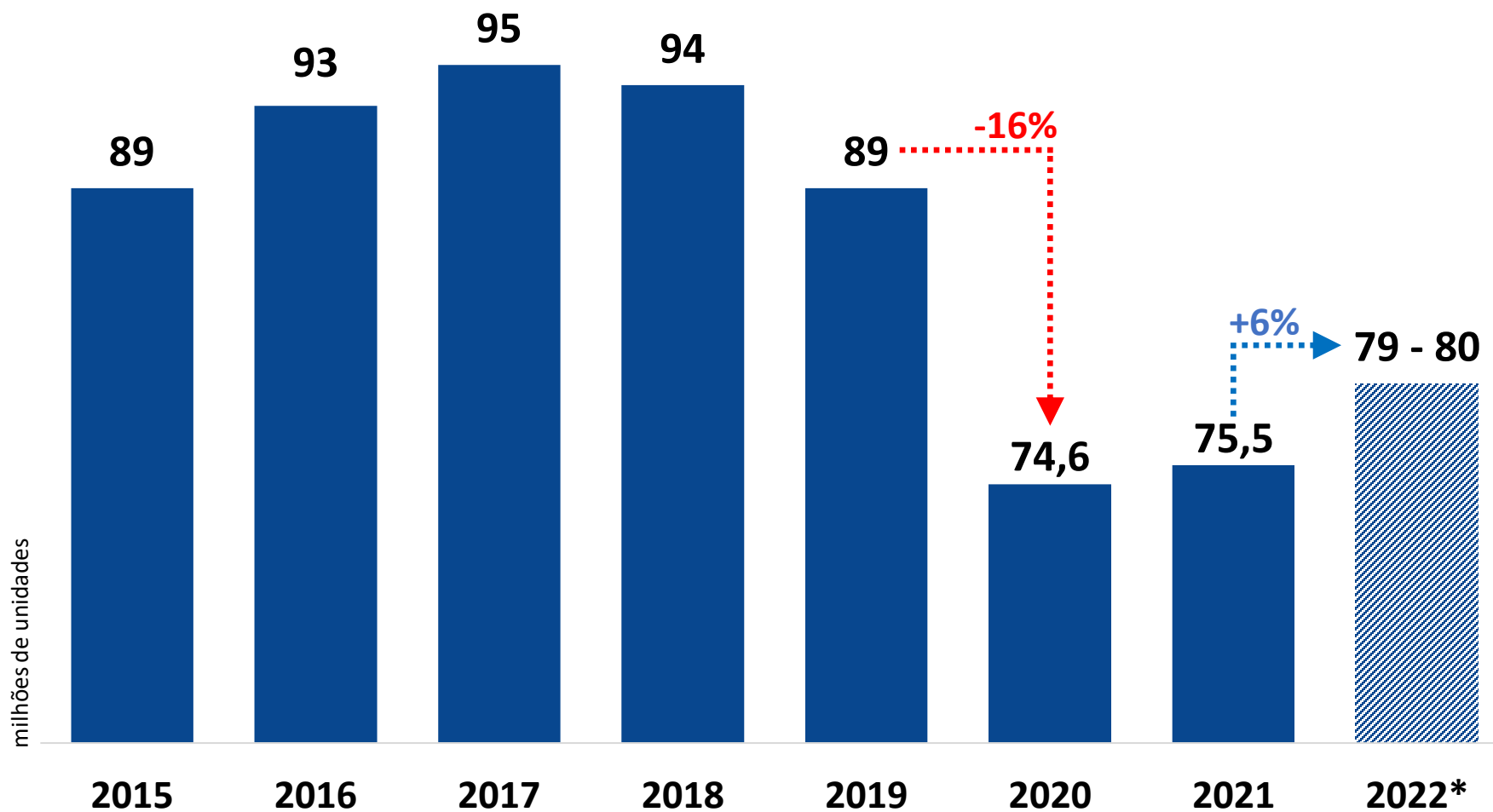
Perspectivas para o Mundo – Veículos Leves

Projeção de Produção em Dez/21



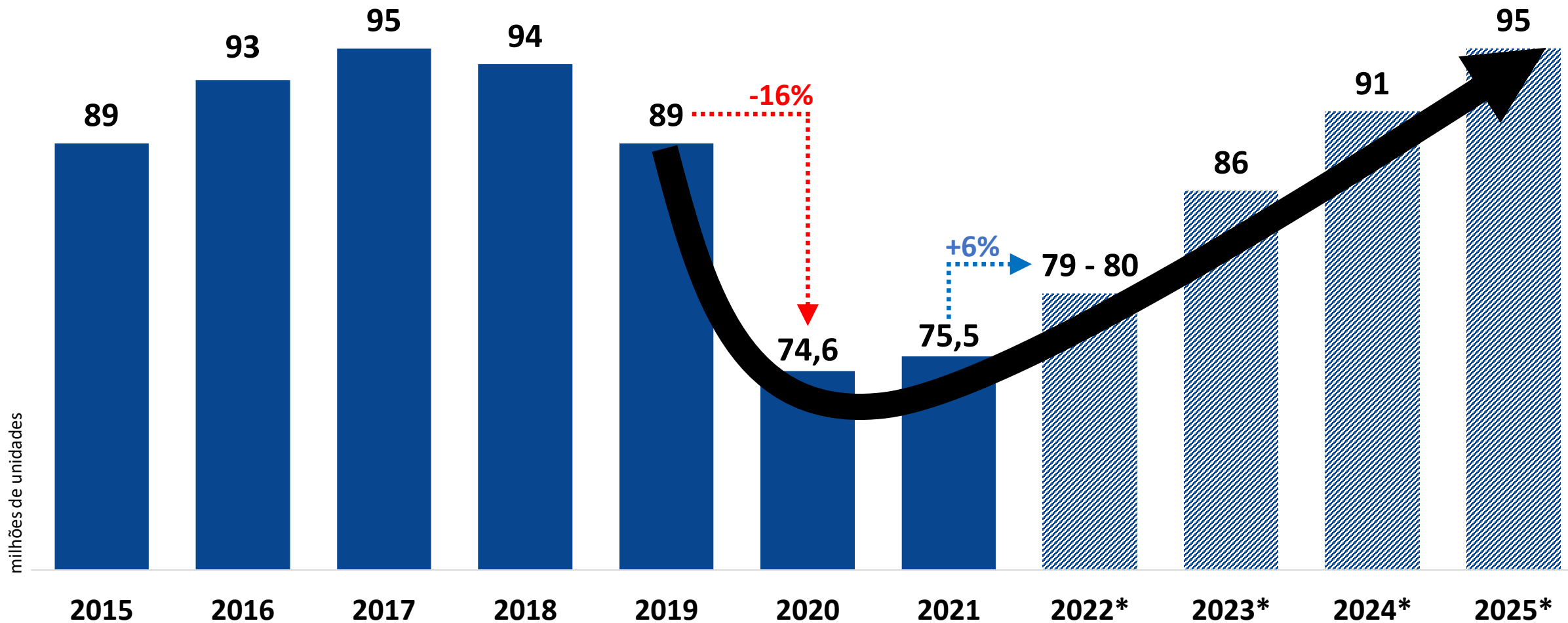
Perspectivas para o Mundo – Veículos Leves

Projeção de Produção em Dez/21

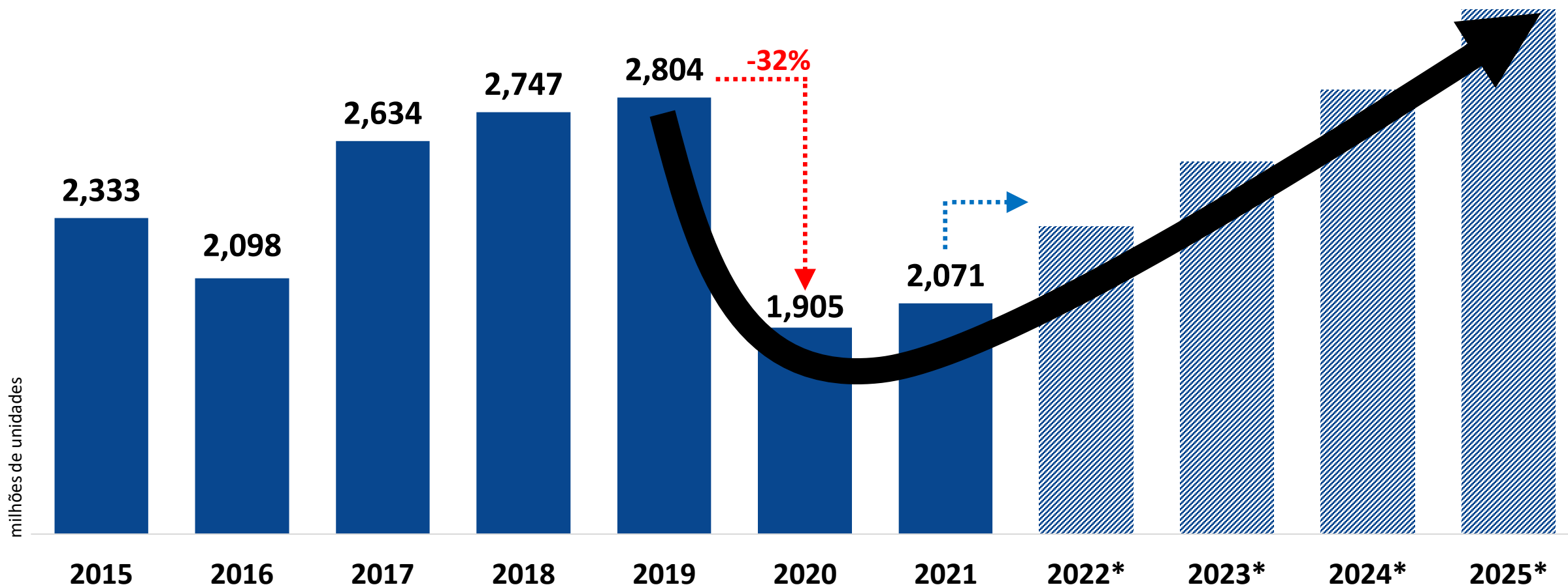


Perspectivas para o Mundo – Veículos Leves

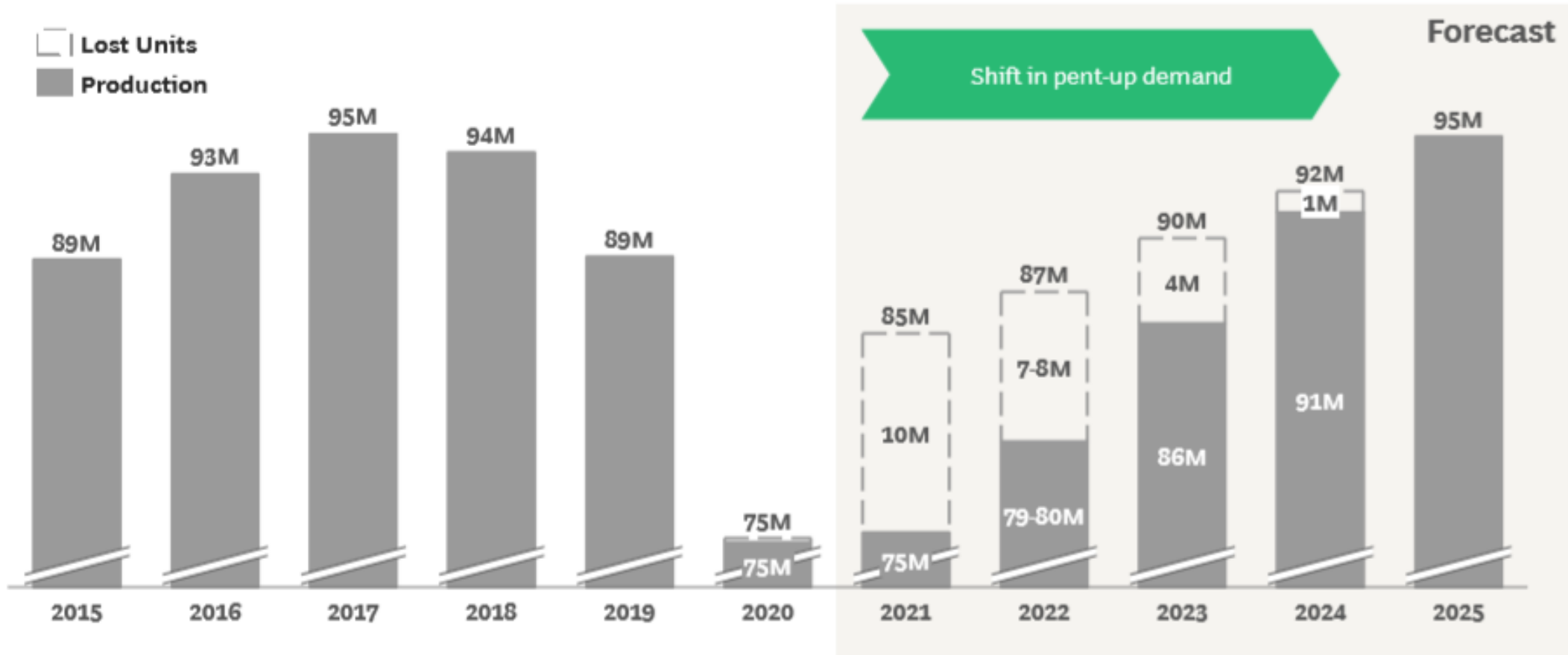
Projeção de Produção em Dez/21



Perspectivas para o Brasil - Produção Veículos Leves



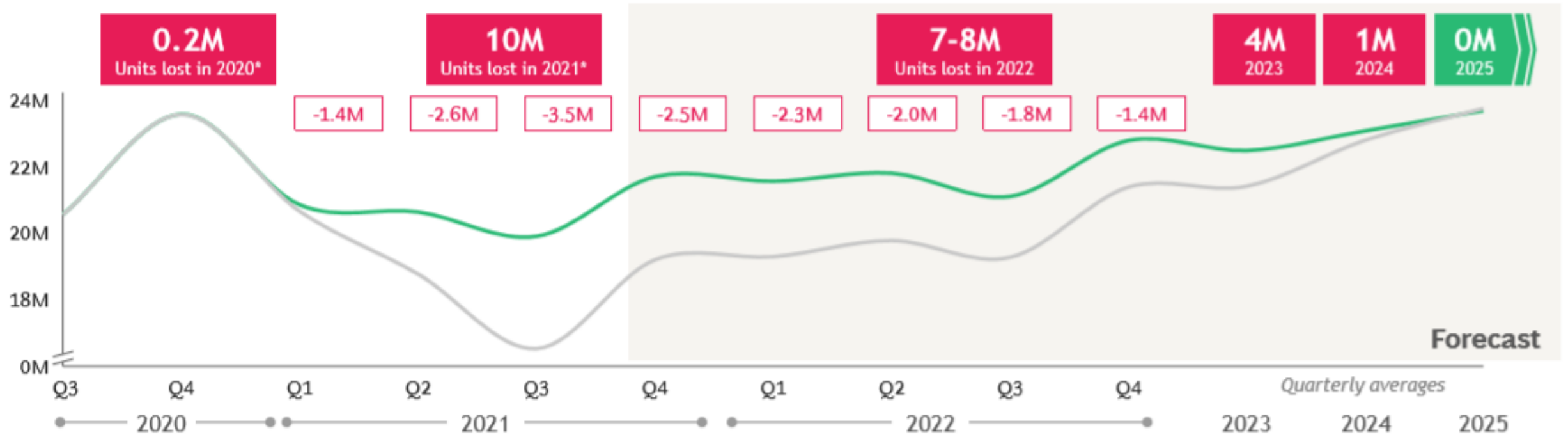
Global annual light vehicle production (million units)



2021 forecast is actuals as of Dec 2021 with correction for reporting delays
 Source: IHS, Baseline IHS Forecast as of 12/2020, BCG automotive semiconductor model updated Dec 2021, BCG Analysis

Automotive production shortfalls expected through 2024

Global quarterly light vehicle production (million units)



Shortage began in 2020

- Auto released orders absorbed by other sectors, demand 10-15% above pre-COVID
- Inventory depleted across supply chain

Rapid supply-demand divergence with economic restart

- High consumer electronic and infra demand
- Supply reduced due to factory shutdowns: fire (Japan), weather (TX), COVID (Malaysia)
- Capacity to be repurposed for auto, in 6-12 mo. and 8-12 week production cycles

Shortage persists as strong demand continues to outpace supply

- Consumer and infrastructure demand remains strong
- EV acceleration increases semiconductor content per vehicle
- Supply chain resiliency remains low
- Capacity repurposed to auto starts to come online
- Existing auto forecast stabilize improving production predictability

Supply-Demand balance normalizes

*Q4 forecast as of Dec 2021
 Source: IHS Markit, BCG automotive semiconductor model updated Dec 2021, expert interviews, BCG analysis

— Potential volumes (w/o IC shortage), IHS Dec 2020 forecast
 — Reduced volumes due to IC shortage, BCG Dec 2021 forecast

XX Expected amount of units lost, in millions

Premissas

- PIB: crescimento $\approx 0,5\%$
- Confiança: retomada com arrefecimento da pandemia
- Desempenho positivo do agronegócio
- Inflação acima da meta
- Taxa de Juros SELIC $\approx 11\%$
- Câmbio: flutuante na faixa de R\$/US\$ 5,50 com volatilidade

Desafios

- Ano eleitoral
- Equilíbrio Fiscal
- Aumento de custos, câmbio, juros e carga tributária
- Fragilidade do mercado de trabalho
- Questões logísticas e de oferta de insumos
- Extensão da crise sanitária

Projeções 2022

Autoveículos: Automóveis, Comerciais leves, Caminhões e Ônibus		Realizado 2020	Realizado 2021		Projeções 2022	
		Mil unidades	mil Unidades	Δ %	mil unidades	Δ %
Licenciamento	TOTAL	2.058	2.120	3,0	2.300	8,5
	Veículos leves	1.955	1.977	1,1	2.143	8,4
	Veículos pesados	104	143	37,8	157	10,0
Exportações	TOTAL	324	376	16,0	390	3,6
	Veículos leves	307	349	13,8	361	3,3
	Veículos pesados	17	27	55,1	29	7,7
Produção	TOTAL	2.014	2.248	11,6	2.460	9,4
	Veículos leves	1.905	2.071	8,7	2.268	9,5
	Veículos pesados	109	178	62,5	192	8,2