

Building International Connections

Believe in your product. Go global.



Performance of the Brazilian Automobile Industry



BUILDING INTERNATIONAL CONNETIONS LTDA

Registered Brazil registration no: **47.037.112/0001-80**

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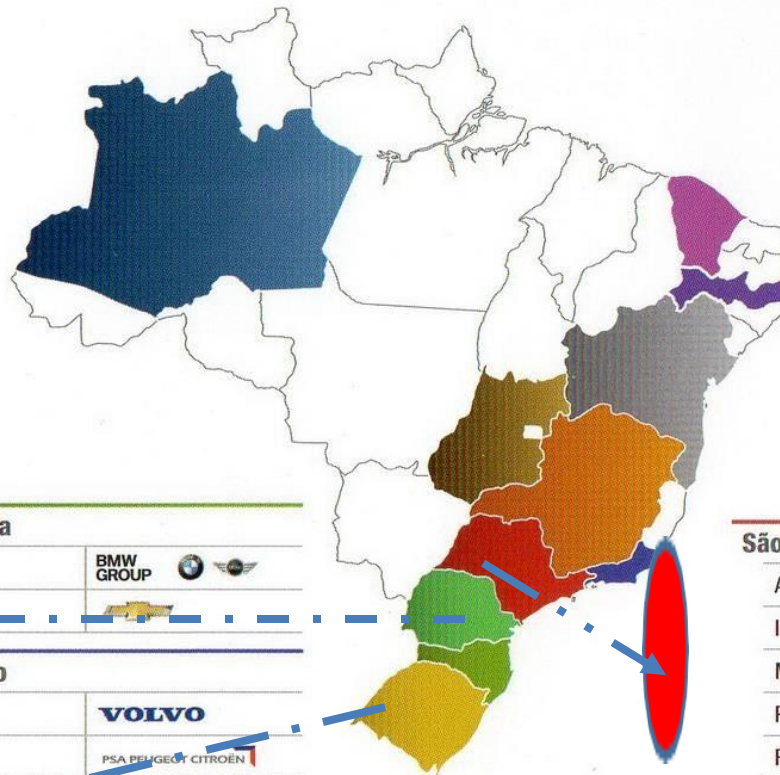
Website: <https://bicqoglobal.com/>

Currently 36 Brands with 65 manufacturing plants in Brazil

Building



Fábricas



Amazonas	
Manaus	Mahindra Rise

Goiás	
Anápolis	FCA HYUNDAI SUBARU
Catalão	JOHN DEERE YANMAR

Paraná	
Campo Largo	FCA CATERPILLAR
Curitiba	CNH INDUSTRIAL VOLVO
Ponta Grossa	DAF A BAWER COMPANY
São José dos Pinhais	AUDI ISUZU RENAULT VW

Rio Grande do Sul	
Canoas	AGCO Your Agriculture Company
Caxias do Sul	JOHN DEERE VALTRA
Dois Irmãos	Mahindra Rise
Gravataí	JOHN DEERE
Horizontina	JOHN DEERE
Ibirubá	AGCO VALTRA
Montenegro	JOHN DEERE
Santa Rosa	AGCO VALTRA

Santa Catarina	
Araquari	BMW GROUP BMW MINI
Joinville	CHEVROLET

Rio de Janeiro	
Pederneiras	VOLVO
Porto Real	PSA PEUGEOT CITROËN
Resende	MAZDA ISUZU

São Paulo	
Arujá	KOMATSU
Indaiatuba	JOHN DEERE TOYOTA
Mogi das Cruzes	AGCO VALTRA
Piracicaba	CATERPILLAR CNH INDUSTRIAL HYUNDAI
Ribeirão Preto	AGCO
São Bernardo do Campo	Ford Scania Mercedes-Benz SCANIA TOYOTA VW
São Caetano do Sul	CHEVROLET
São Carlos	VW
São José dos Campos	CHEVROLET
Sorocaba	CNH INDUSTRIAL TOYOTA
Sumaré	ISUZU
Suzano	KOMATSU
Taubaté	Ford VW

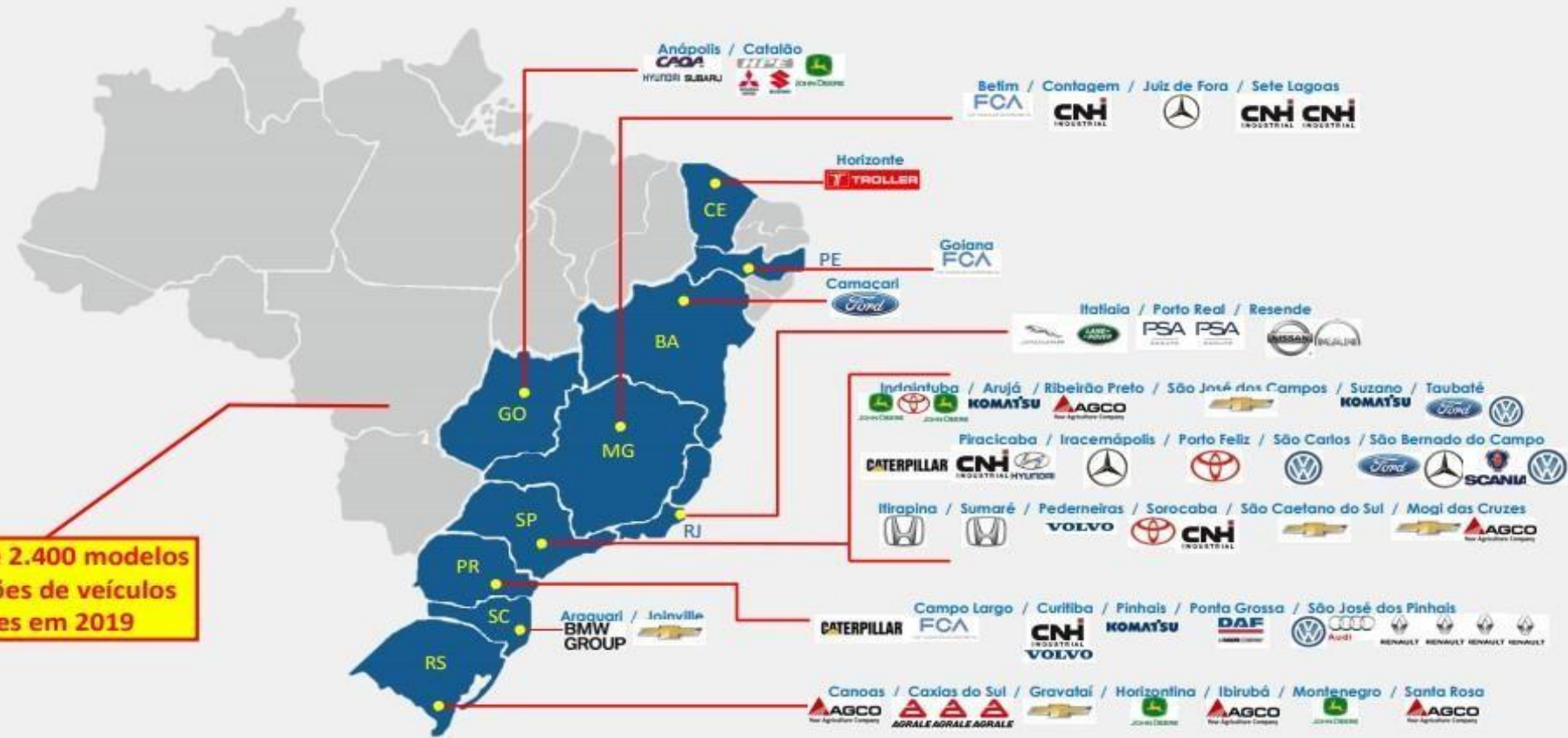
As 31 empresas associadas à ANFAVEA reúnem 65 unidades industriais (veículos, máquinas agrícolas e rodoviárias, motores, componentes, outros produtos). As fábricas estão sediadas em 11 Estados (Rio Grande do Sul, Santa Catarina, Paraná, São Paulo, Rio de Janeiro, Minas Gerais, Goiás, Bahia, Ceará, Amazonas e Pernambuco). A indústria está presente em todas as regiões do País – Sul, Sudeste, Centro-Oeste, Norte e Nordeste – com fábricas sediadas em 40 municípios.

In 2020 the sector has 67 factories in 10 states

Em 2020 o Setor Possui **67** Fábricas em **10** Estados

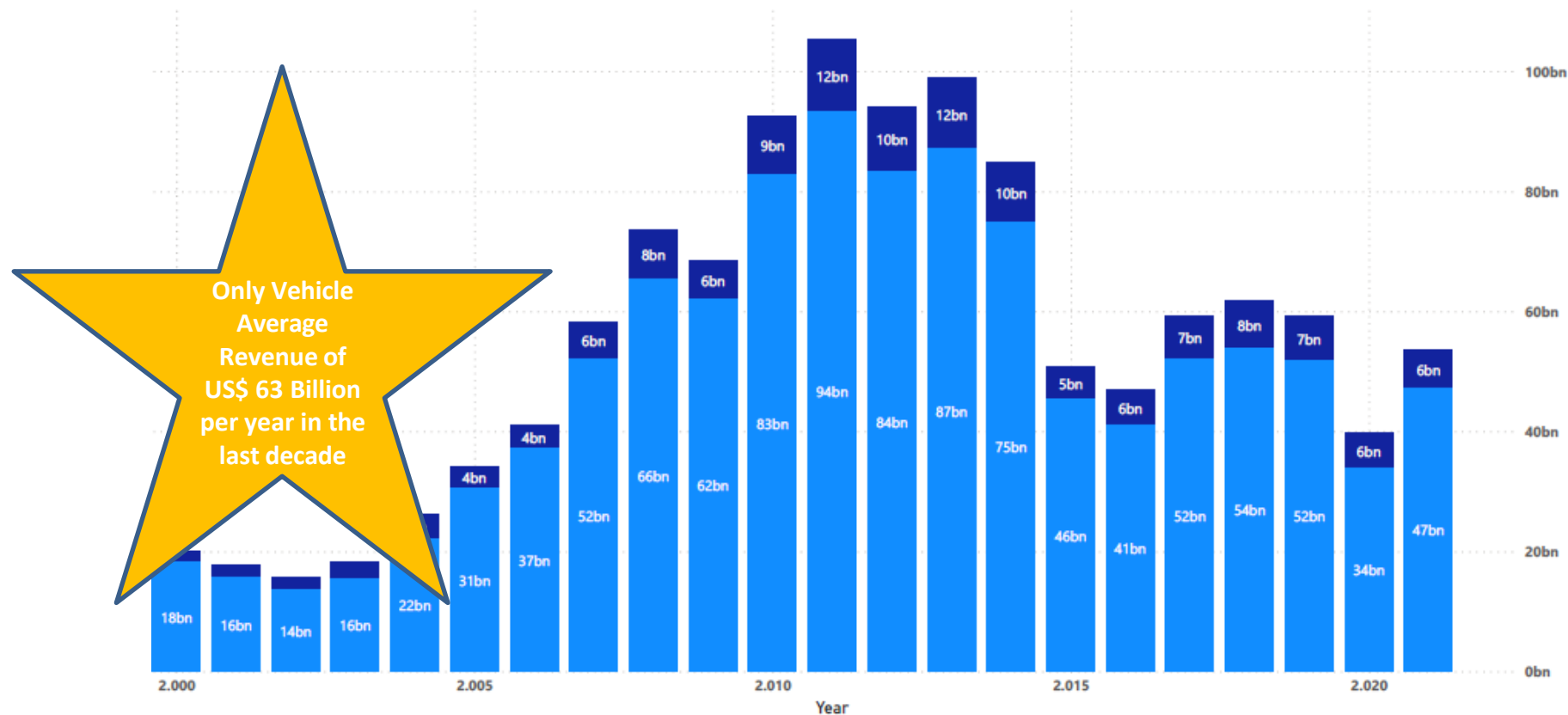


Mais de 2.400 modelos e versões de veículos leves em 2019



1.6 Faturamento líquido por setor - 1966/2020

1.6 The automotive industry's net revenue by sector - 1966/2020

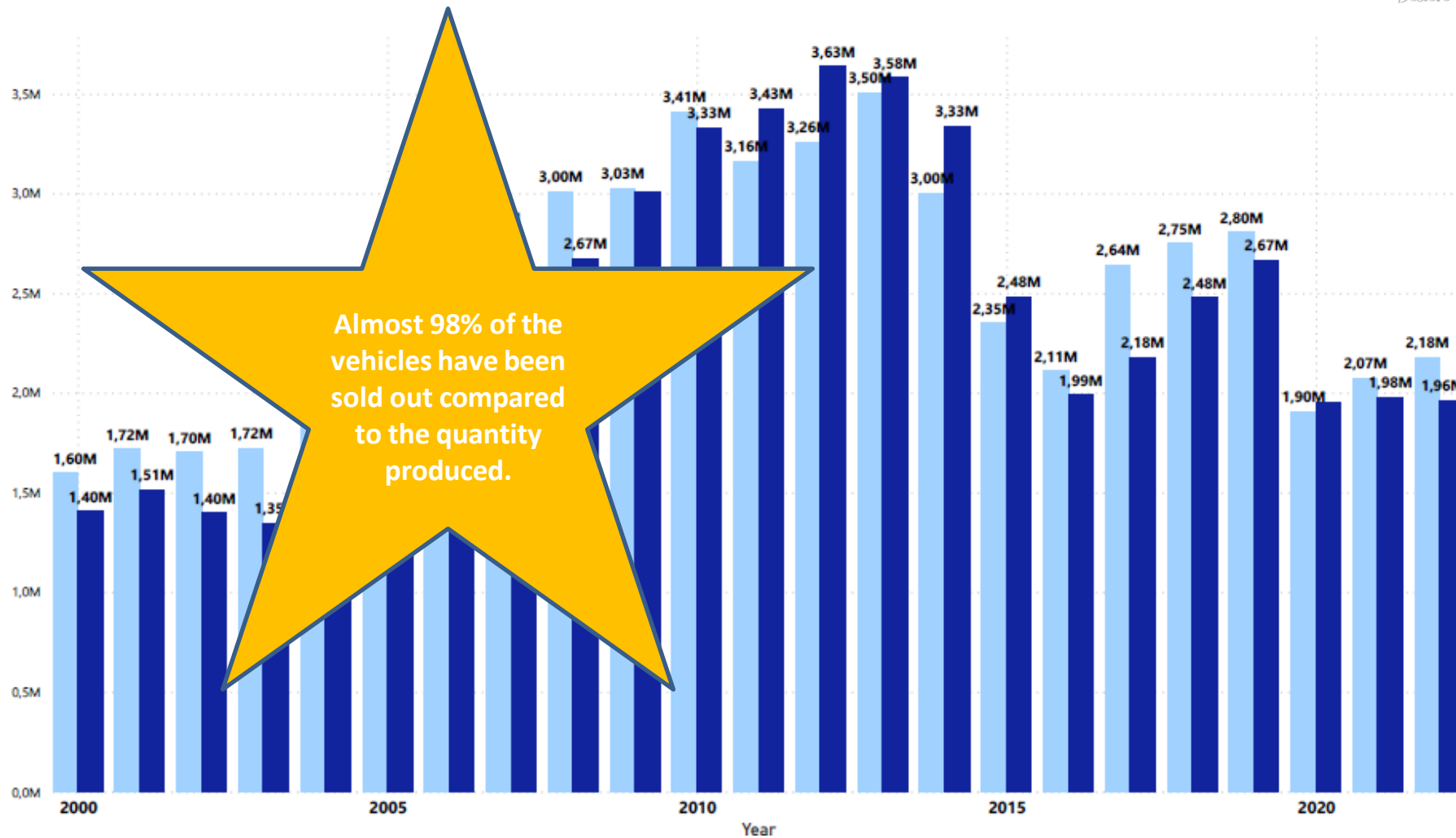


Only Vehicles

Agriculture & Construction Machinery

FONTE / SOURCE: ANFAVEA
 NOTAS / NOTES: 1. Faturamento sem impostos. / Tax free revenue. 2. Valores convertidos em dólar pela taxa média de cada ano. / Real prices converted into dollars using the average exchange rate of each year.

Total production* of vehicles Vs Registration of new vehicles - local and imported - 2000/2022 Cars & Light Commercial



(*) Autoveículos montados e desmontados (CKD). / Includes assembled and CKD vehicles.

FONTES / SOURCES: ABEIFA, ANFAVEA.

NOTA 1. Nesta tabela, consideram-se as vendas de autoveículos importados a partir de 1990 / In this table, sales of imported vehicles have been considered starting from 1990.

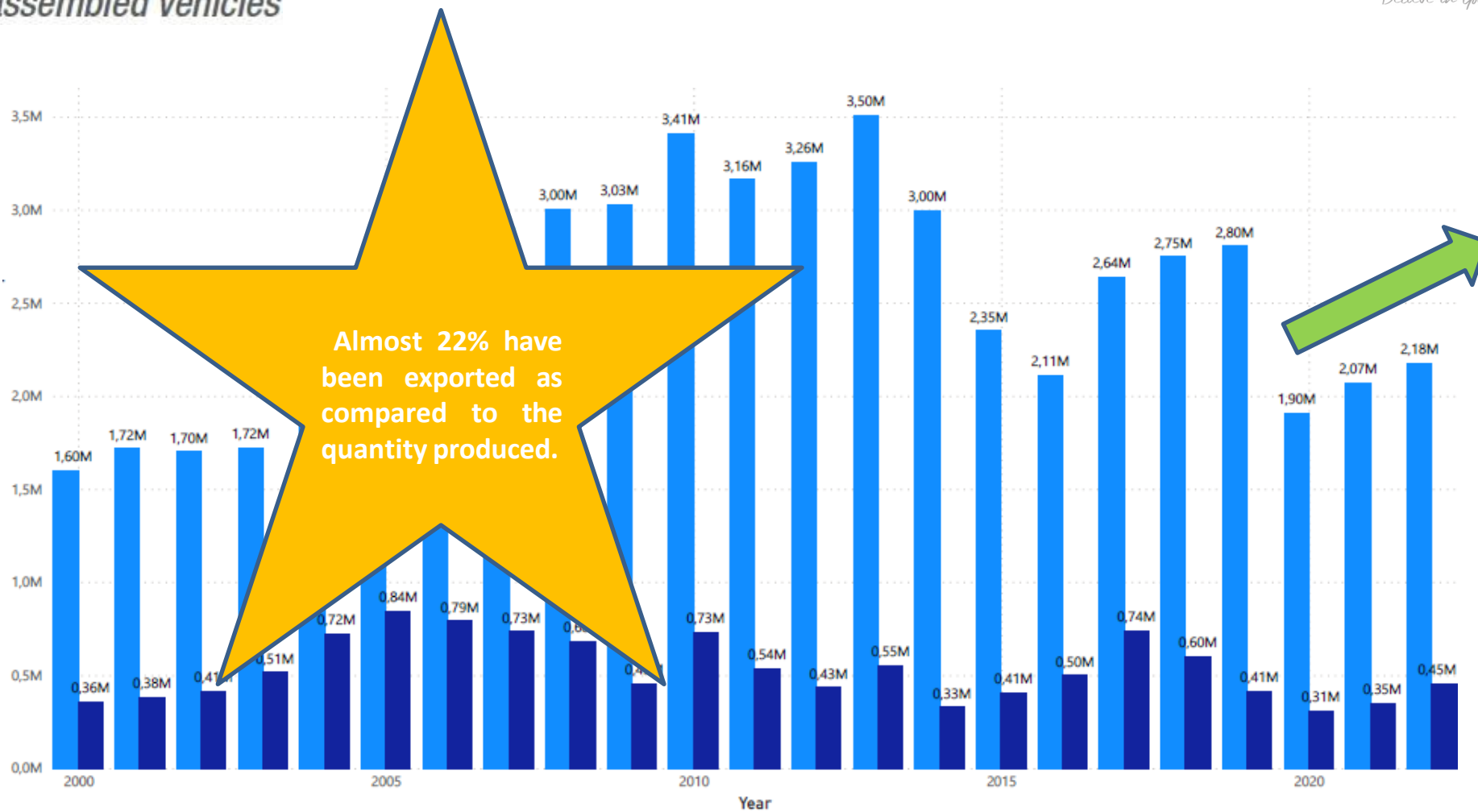
NOTA 2. Os dados até 2001 se referem a vendas internas no atacado / Before 2002 the data refer to domestic wholesales of vehicles.

Production
Registration

Vehicles: production, and exports

Total production* of vehicles

Total exports* of assembled vehicles



(*) Autoveículos montados e desmontados (CKD). / Includes assembled and CKD vehicles.

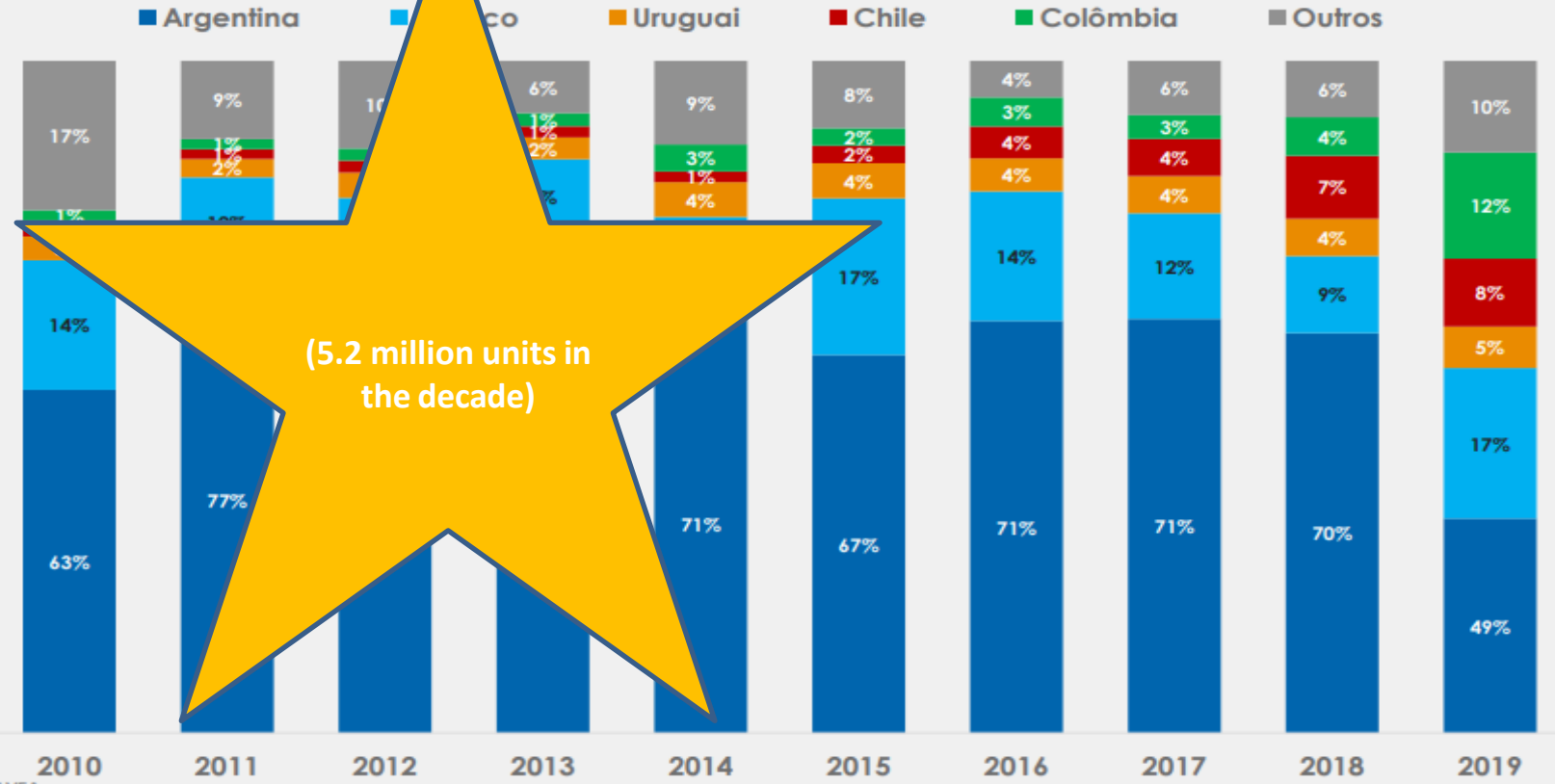
Total Production

Total Export

Percentage of light vehicles exported by Brazil

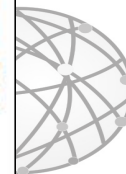


Percentual de Veículos Leves Exportados pelo Brasil (5,2 milhões de unidades na década)

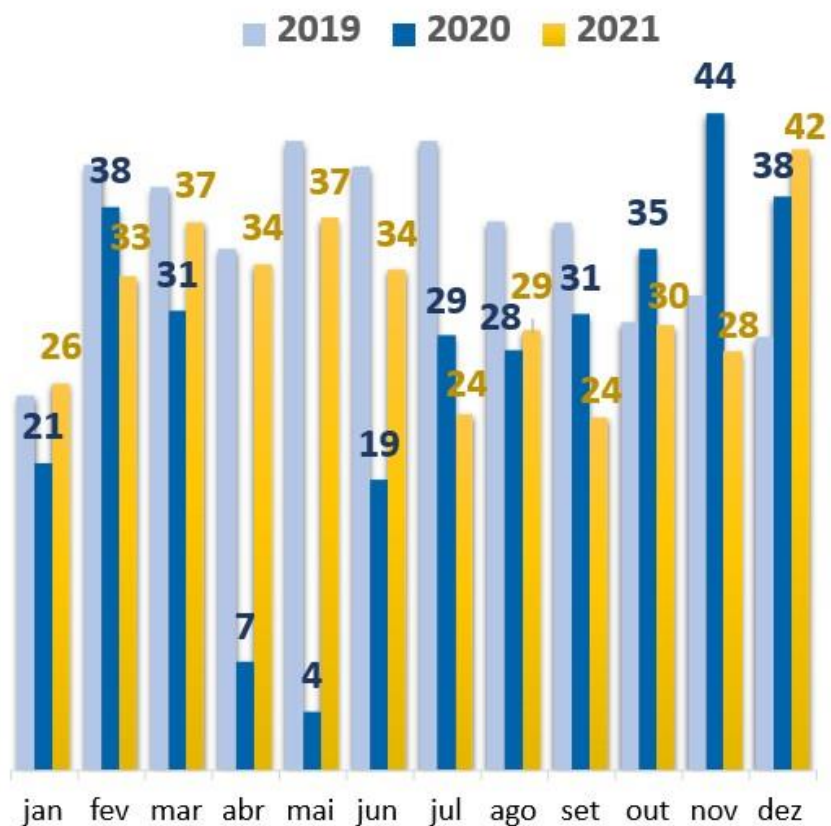


Fonte: SECEX e ANFAVEA

Comparativo 2019, 2020 e 2021 - Autoveículos

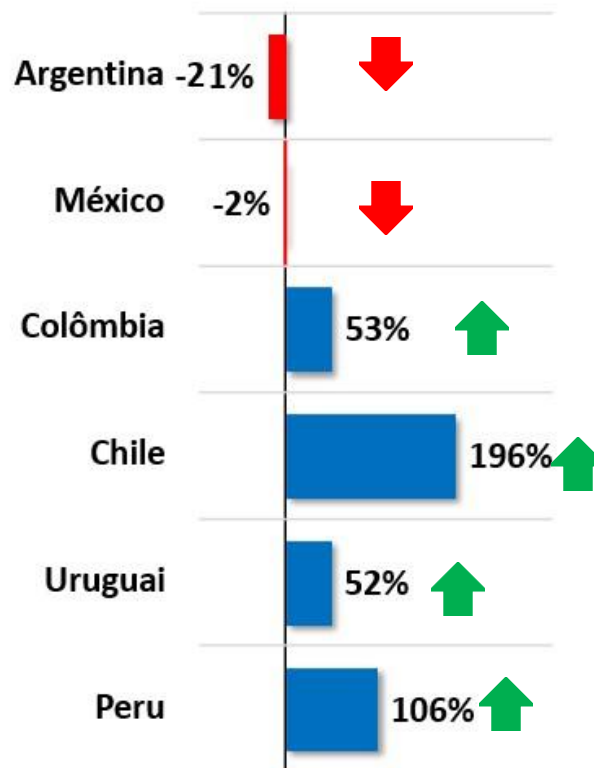


Exportações (mil unidades)



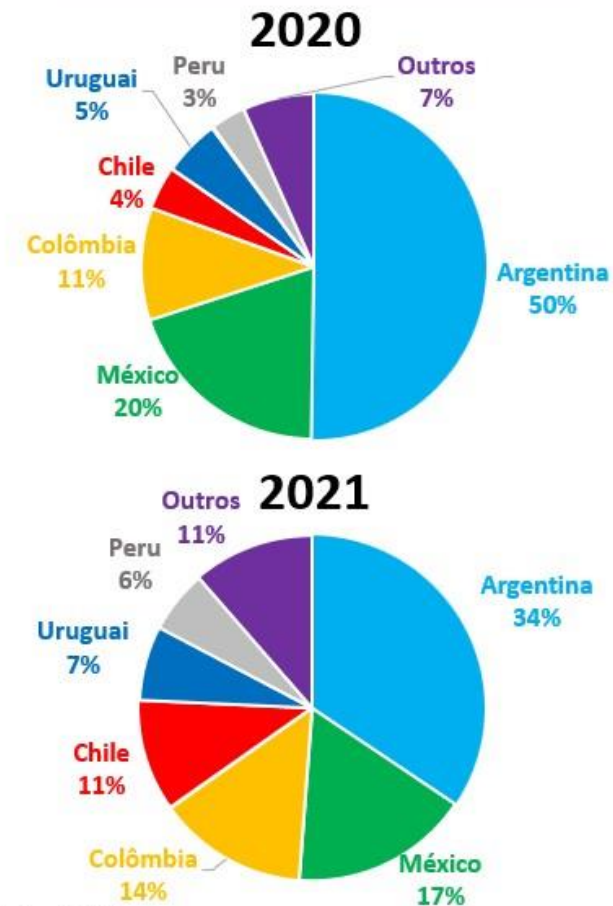
Fonte: ANFAVEA

Países de Destino (variação %)



Fonte: SECEX

Participação nas Exportações (% do total)



Fonte: SECEX

4.5 América Latina - Dados automotivos - países selecionados

4.5 Latin America - Automotive data - selected countries

PAÍS / COUNTRY	PRODUÇÃO (em unidades) Production (units)		VENDAS INTERNAS (em unidades) Domestic sales (units)		FROTA (em unidades) Fleet (units)	HABITANTES POR VEÍCULO Inhabitants per vehicle
	2020	2021	2020	2021	2016	2016
Argentina* / Argentina	257.187	434.753	312.789	334.389	14.135	3.1
Bolívia / Bolívia	-	-	24.537	37.009	1.320	8.2
BRASIL / BRAZIL	2.014.055	2.248.253	2.058.437	2.119.851	43.092	4.8
Chile / Chile	-	-	272.107	434.347	4.651	3.9
Colômbia / Colombia	47.281	40.764	188.665	250.497	5.332	9.1
Costa Rica / Costa Rica	-	-	23.210	27.140	1.090	4.5
Equador** / Ecuador	13.968	18.970	85.818	119.316	2.267	7.2
México / Mexico	3.177.251	3.145.653	977.650	1.046.705	39.417	3.2
Panamá / Panama	-	-	22.997	38.141	771	5.2
Paraguai / Paraguay	-	-	23.479	29.731	1.183	5.7
Peru / Peru	-	-	108.999	152.856	2.662	11.9
Porto Rico / Puerto Rico	-	-	103.487	105.349	3.320	1.0
Uruguai / Uruguay	-	-	36.398	51.737	1.055	3.3
Venezuela / Venezuela	107	8	1.675	nd / na	4.222	7.5
TOTAL / TOTAL	5.509.849	5.888.401	4.240.248	4.747.068	124.516	4.5

Key players
For Central &
South America

Brazil
&
Mexico

FONTES PARA PRODUÇÃO E VENDAS / SOURCES FOR PRODUCTION AND SALES: ACAU (Uruguai/ Uruguay), ADEFA (Argentina/ Argentina), AEADE (Equador/ Ecuador), ANAC (Chile/ Chile), ANDEMOS (Colômbia/ Colombia), ANFAVEA (Brasil/ Brazil), CADAM (Paraguai / Paraguay), FAVENPA (Venezuela/ Venezuela), OICA, CeicData, Focus2move (demais países/ other countries).

FONTES PARA FROTA: Associações de fabricantes de veículos e/ou órgãos públicos de trânsito e transporte dos países selecionados. / SOURCES FOR FLEET: Vehicle manufacturers associations and / or public transit and transport bodies in selected countries. ND- não disponível / NA- not available.

*Não inclui caminhões e ônibus. / Does not include trucks and buses. **Os dados de produção dizem respeito às vendas de veículos montados no país. / Production data refer to sales of vehicles assembled in the country.



CAPÍTULO 2

Referências internacionais

CHAPTER 2
International data



Ranking Mundial de Autoveículos de 2012 a 2021

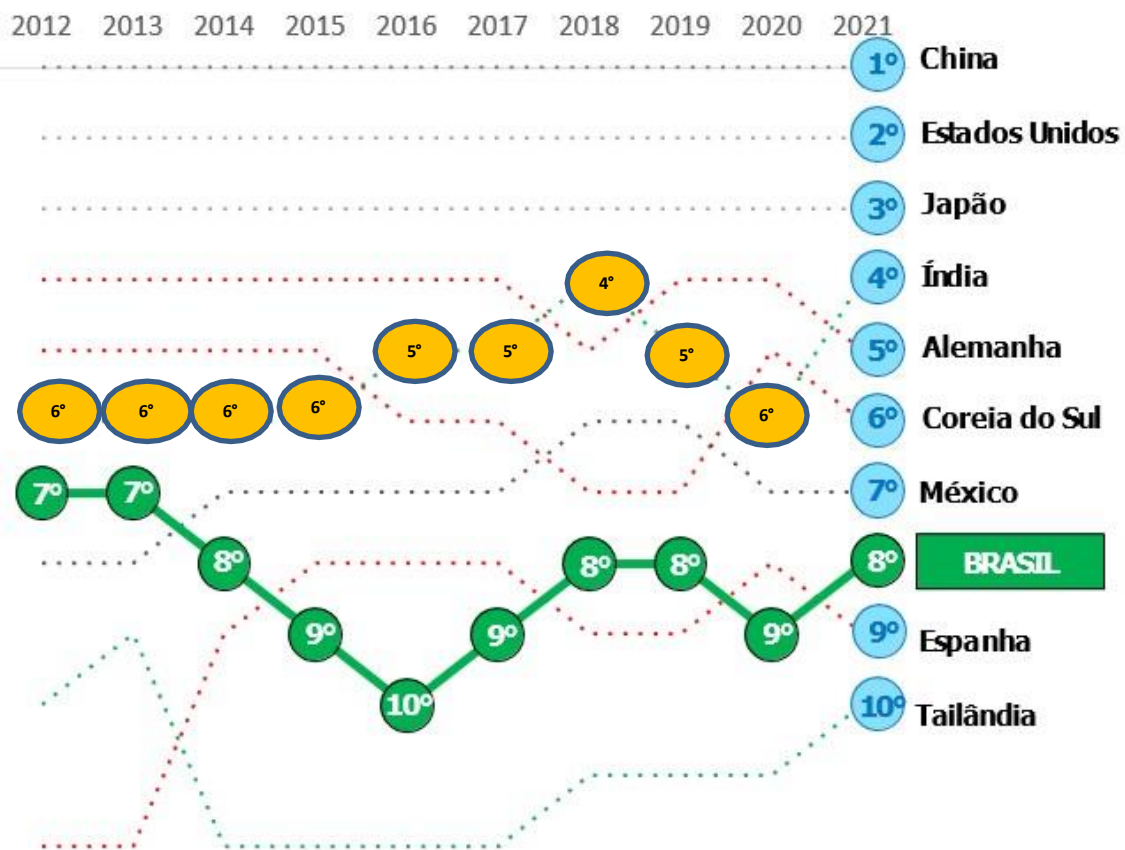
vehicle production

Produção

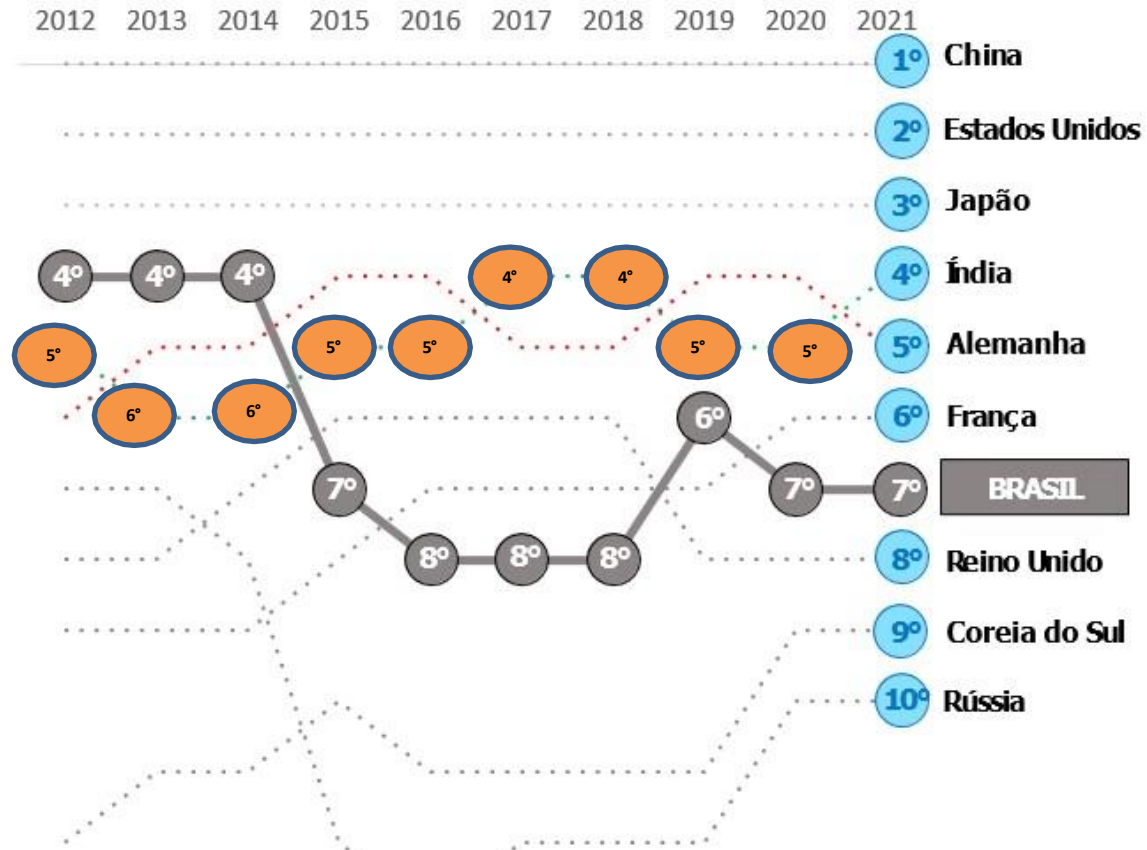
Dados preliminares para 2021

Registration of new vehicles

Licenciamento



Fonte: OICA (até 2020), 2021 projeção ANFAVEA



Fonte: OICA (até 2020), 2021 projeção ANFAVEA

Road Transport

61%
Highways

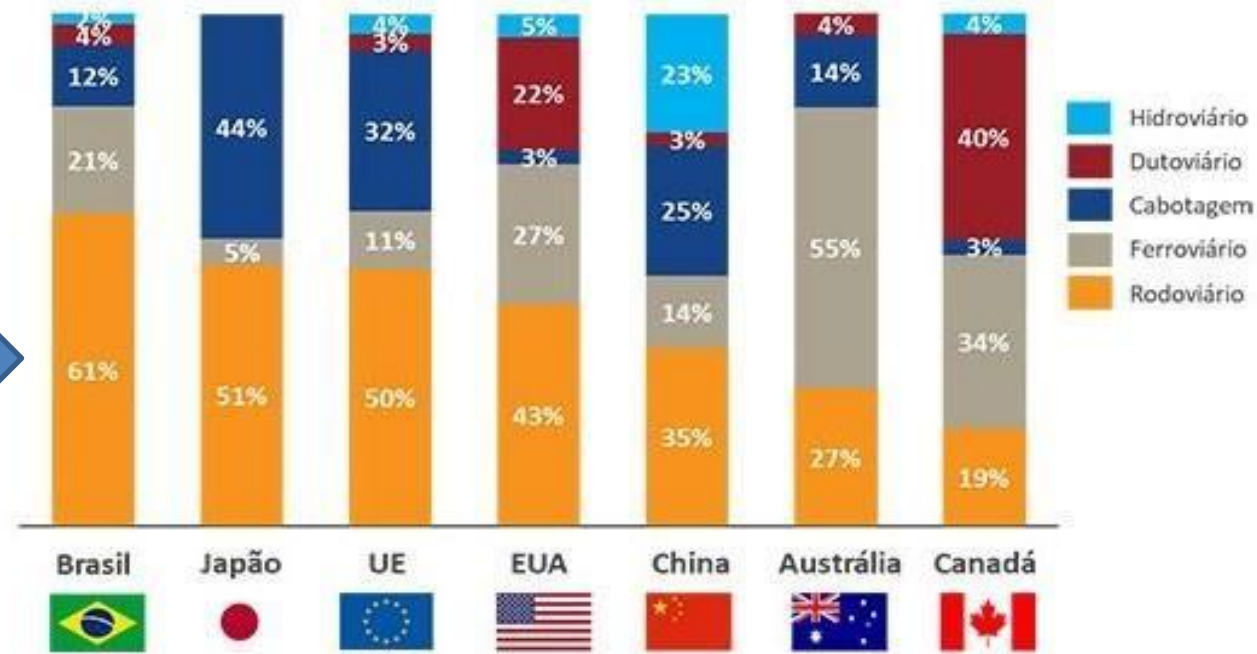


Figura 1: Matriz de Transportes nos países (% de TKU). Fontes: ILO5 (Brasil); National Bureau of Statistics of China, Bureau of Transportation Statistics (EUA), Eurostat (UE), North American Transportation Statistics (Canadá), Department of Infrastructure, Transport, Cities and Regional Development (Austrália), Statistics Bureau (Japão).

Top 10 Largest Countries in the World (by total area km²):

1. [Russia](#) — 17,098,250 km²
2. [Canada](#) — 9,879,750 km²
3. [China](#) — 9,600,013 km²
4. [United States](#) — 9,525,067 - 9,831,510 km²
5. [Brazil](#) — 8,515,770 km²
6. [Australia](#) — 7,741,220 km²
7. [India](#) — 3,287,260 km²



AUTOMOTIVO

Honda investe R\$ 500 milhões na fábrica de motos de Manaus



AUTOMOTIVO

Montadoras planejam investir R\$ 36,7 bi no Brasil até 2022



AUTOMOTIVO

Toyota investe R\$ 1 bilhão no país e abre caminho para o novo Corolla



MERCADO

Setor de autopeças ensaia recuperação com alta de 20%

Building International Connections
Believe in your product. Go global.



OEM
Future
investment in
Billions of US\$



AUTOMOTIVO

Até 2025, um terço das vendas da Volvo será de carros autônomos



MERCADO

Em três anos, Toyota dobrou investimentos no País



MERCADO

ArcelorMittal descongela projeto de R\$ 1,2 bi



AUTOMOTIVO

BMW investirá R\$ 125 milhões na fábrica de Araquari



AUTOMOTIVO

FCA e PSA negociam fusão de US\$ 50 bilhões



AUTOMOTIVO

Mercedes investirá R\$ 2,3 bilhões no Brasil até 2023



AUTOMOTIVO

Nissan projeta crescimento e novo investimento no Brasil



AUTOMOTIVO

FCA investirá mais R\$ 7,5 bilhões em Pernambuco



AUTOMOTIVO

Honda investe R\$ 500 milhões na fábrica de motos de Manaus

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Why Invest in Brazil?

- ➔ **36** OEM Brands with **65** manufacturing plants.
 - ➔ Produced x Registered cars Almost **98%** sold out.
 - ➔ Export cars almost **22%**.
 - ➔ World ranking in Vehicle Production is **top 8**.
 - ➔ World Ranking in new vehicle registration is **top 7**.
 - ➔ Brazil is **the Biggest** producer in South America & 2nd the Biggest player in Latin America.
 - ➔ **Billions** of Dollars Future investment in OEM.

BRAZIL IS THE 9TH ECONOMY WORLDWIDE

World's Top 15 Economies in Nominal GDP Terms (USD Trillion – 2019)



PPP rank	2014		2030		2050	
	Country	GDP at PPP (2014 US\$bn)	Country	Projected GDP at PPP (2014 US\$bn)	Country	Projected GDP at PPP (2014 US\$bn)
1	China	17,632	China	36,112	China	61,079
2	United States	17,416	United States	25,451	India	42,205
3	India	7,277	India	17,138	United States	41,384
4	Japan	4,788	Japan	6,006	Indonesia	12,210
5	Germany	3,621	Indonesia	5,486	Brazil	9,164
6	Russia	3,559	Brazil	4,996	Mexico	8,014
7	Brazil	3,073	Russia	4,854	Japan	7,914

★
Sources:
World Bank
IMF
Economist
USDA

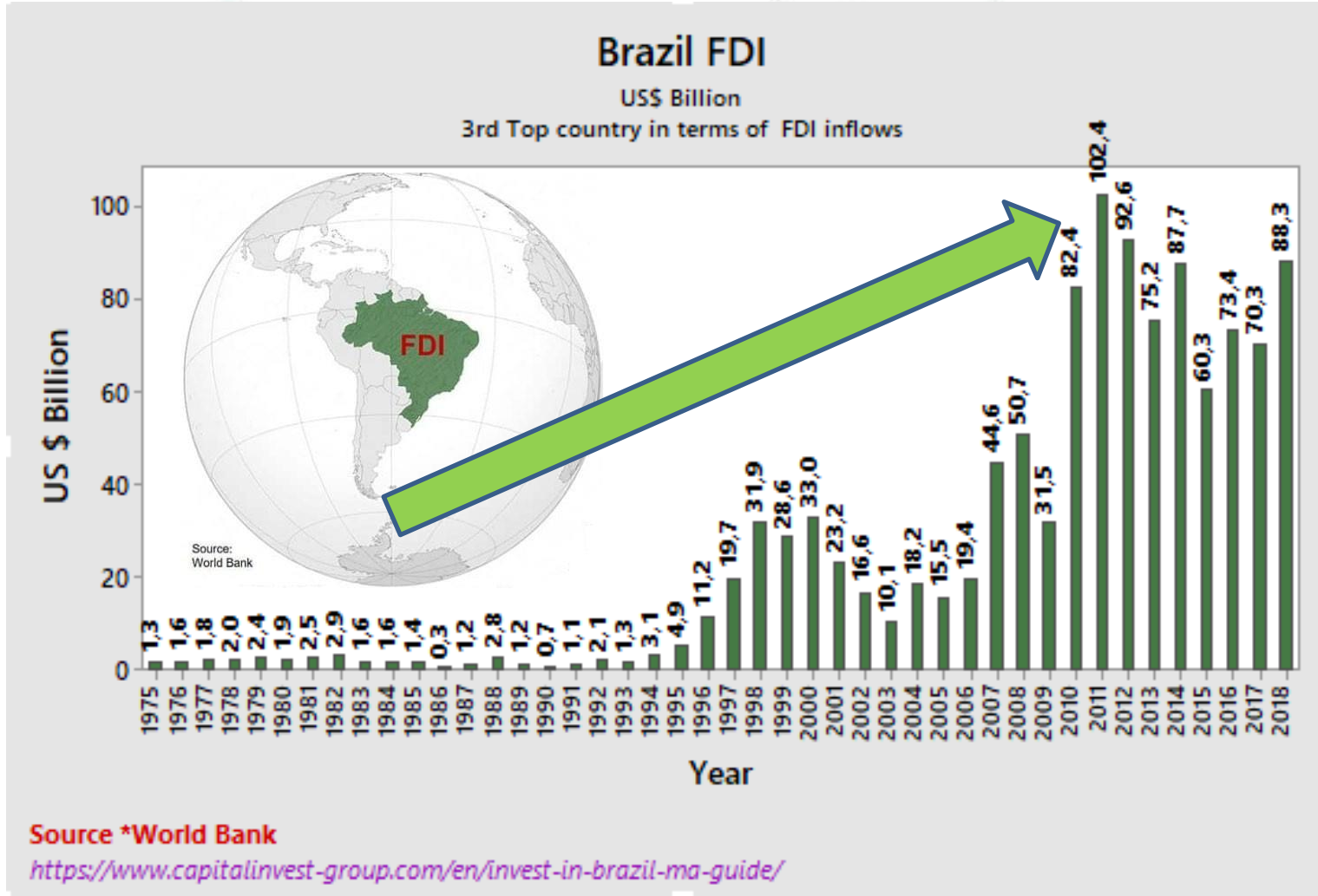
	USA	China	Japan	Germany	UK	France	India	Italy	Brazil	Canada	Russia	Korea	Australia	Spain	Mexico	World
→ GDP US\$ tri	20,54	13,61	4,97	3,95	2,86	2,78	2,72	2,08	→ 1,87	1,71	1,66	1,62	1,43	1,42	1,22	85,91
→ FDI Inflows US\$ bi	258	203	26	105	59	60	42	31	→ 88	45	9	14	61	45	37	1.205
Population .000 000	327	1.393	127	83	66	67	1.353	60	209	37	144	52	25	47	126	7.594
Surface sq km .000 000	9,83	9,56	0,38	0,36	0,24	0,55	3,29	0,30	8,52	9,98	17,10	0,10	7,74	0,51	1,96	132,03
GDP per capita US\$.000	62,79	9,77	39,29	47,60	42,94	41,46	2,01	34,48	8,92	46,23	11,47	31,36	57,37	30,37	9,67	11,31
GDP % CAGR 2018-2023	2,00%	5,90%	0,87%	1,27%	1,81%	1,57%	7,21%	0,92%	2,47%	1,82%	1,90%	2,37%	2,59%	1,65%	2,32%	5,72%
Inflation %	2,44%	2,93%	-0,09%	1,51%	1,90%	0,79%	4,11%	0,88%	3,03%	1,93%	10,30%	0,32%	1,89%	1,09%	4,97%	2,77%

Brazilian FDI Trends

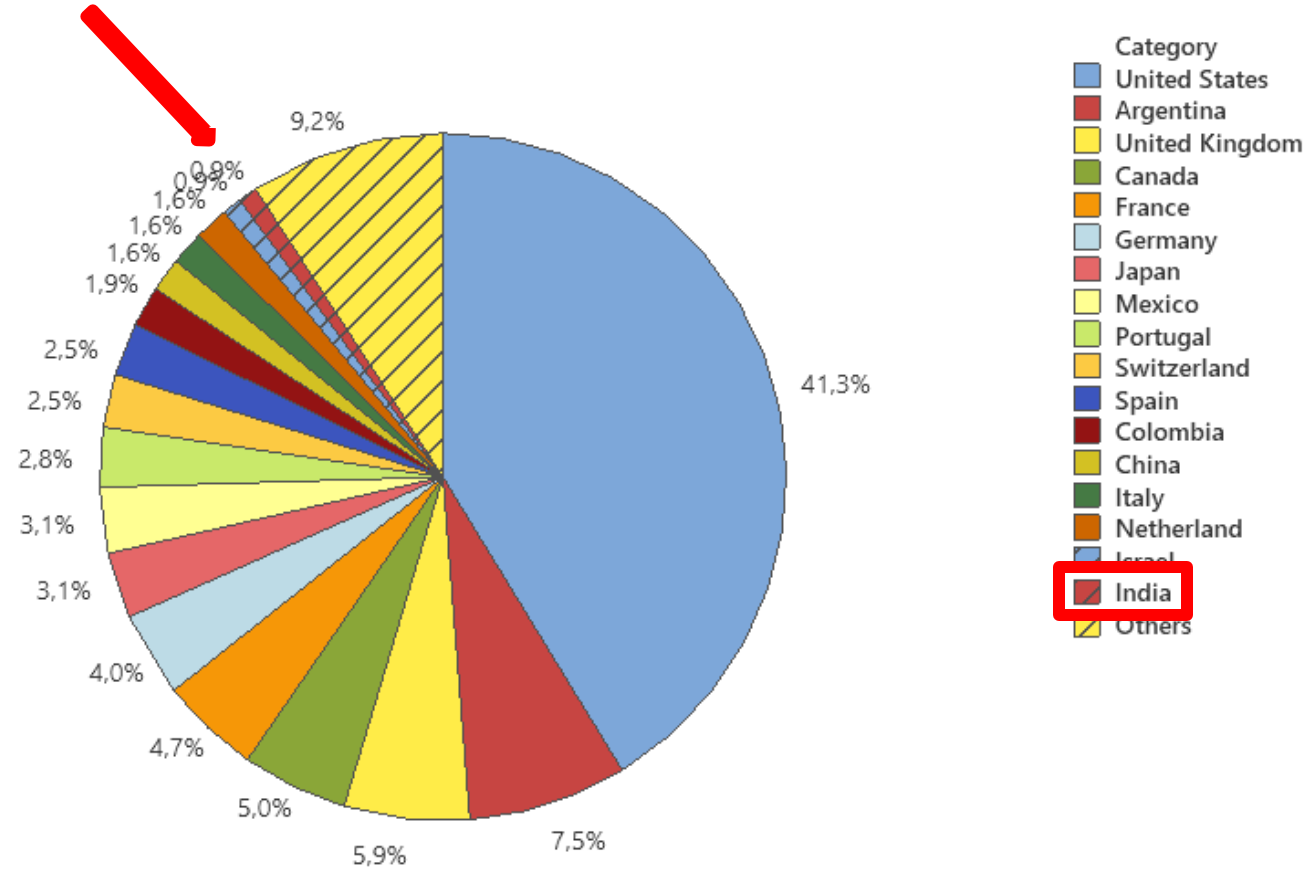
As show on the graph below, Brazil is currently the 3th top country in terms of FDI inflows among the top 15 economies (the top 4 are USA, China, Singapore and Brazil).

The reason for this is that, after the 90's economic reforms ("Plano Real") and the improvements of the business environment along the last 20 years, Brazil has been experiencing significant increases in Foreign Direct Investment (FDI) inflows:

... **THUS, BRAZILIAN FDI HAS BEEN GROWING SINCE 1993...** **Brazilian Foreign Direct Investment inflows (US\$ billion)**

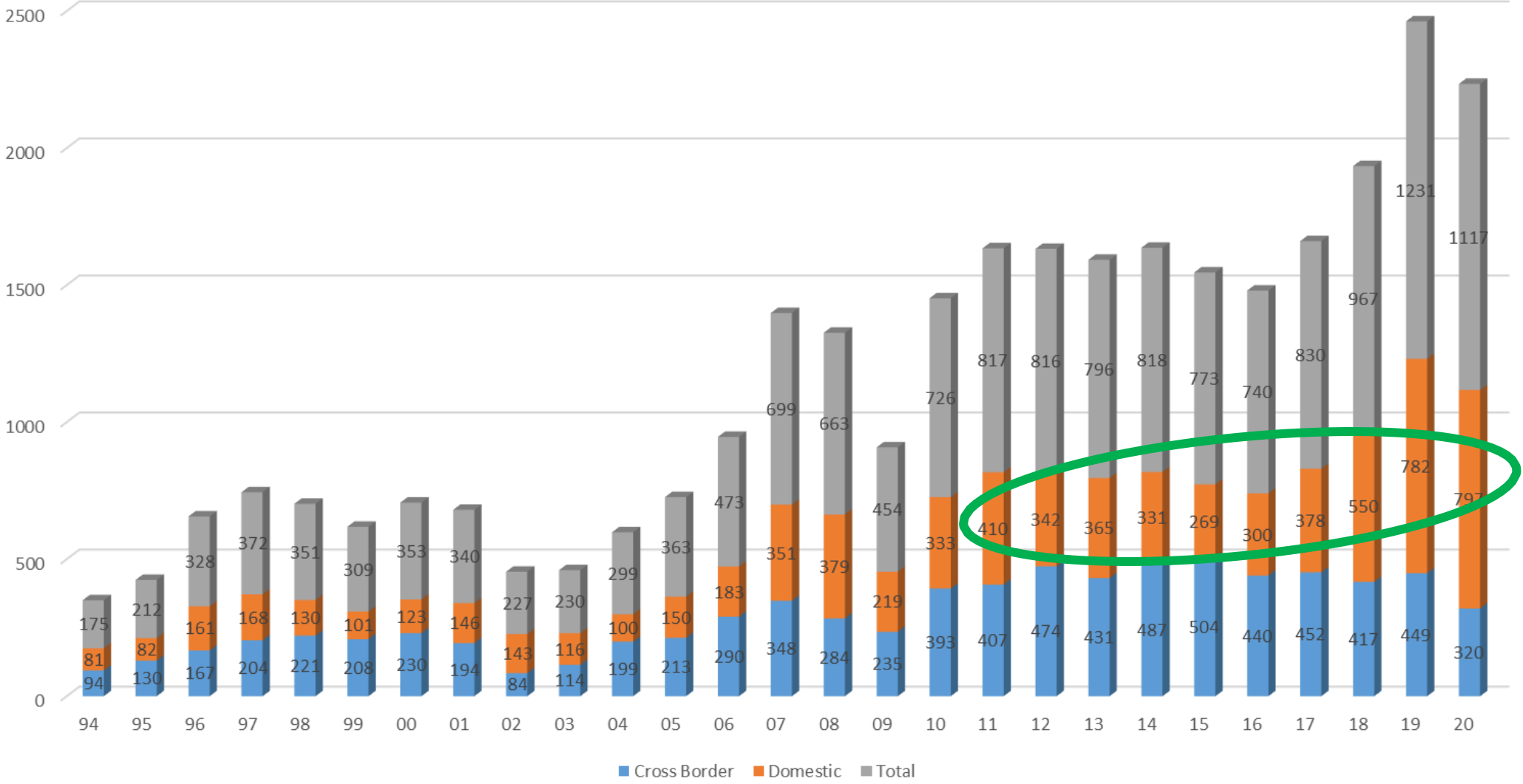


The Most Active Foreign investors in Brazil

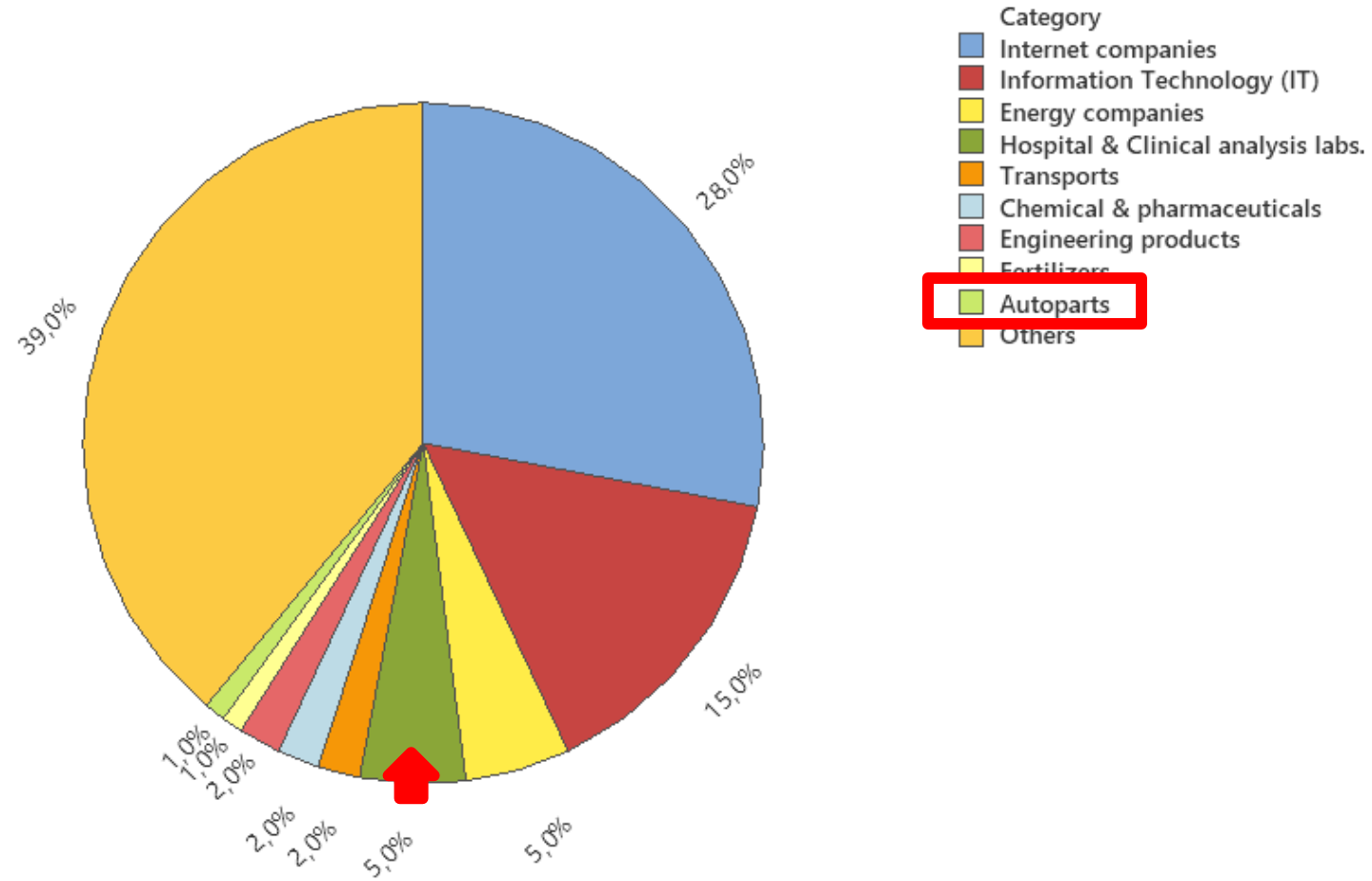


BRAZILIAN M&A MARKET

Number of transaction per year - total/ domestic/ cross border

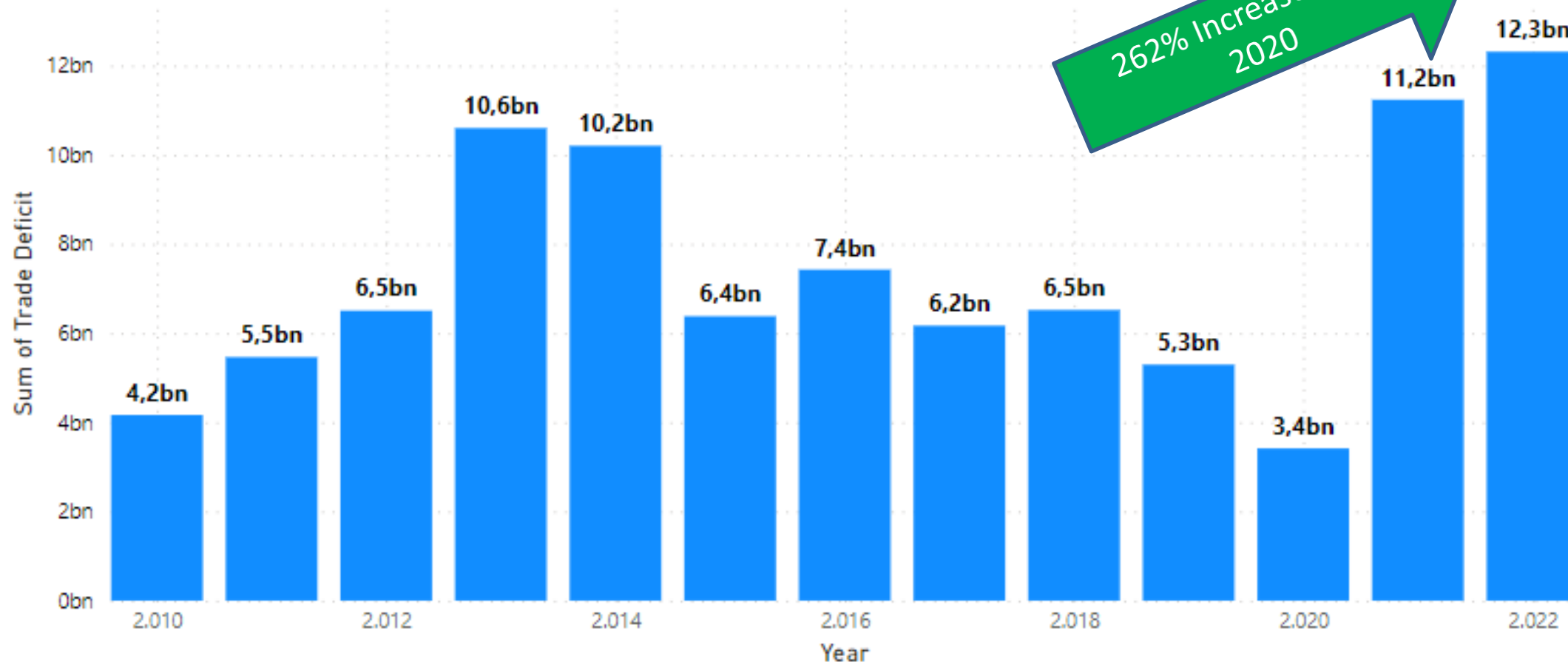


Potential Investment Opportunities in Brazil



1.9 Balança comercial da indústria automotiva (autoveículos, autopeças, máquinas agrícolas, máquinas rodoviárias, outros) - 2001/2022 / 1.9 Brazilian automotive industry trade balance (vehicles, autoparts, agricultural machinery, high way construction equipment and others) - 2001/2022

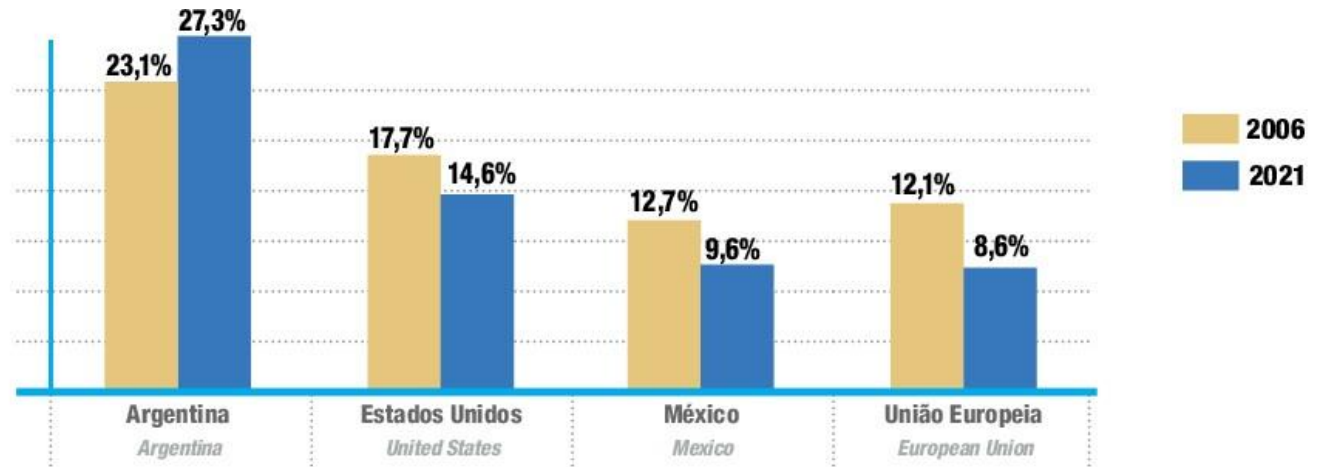
Sum of Trade Deficit by Year



Import Auto Parts Trade Deficits

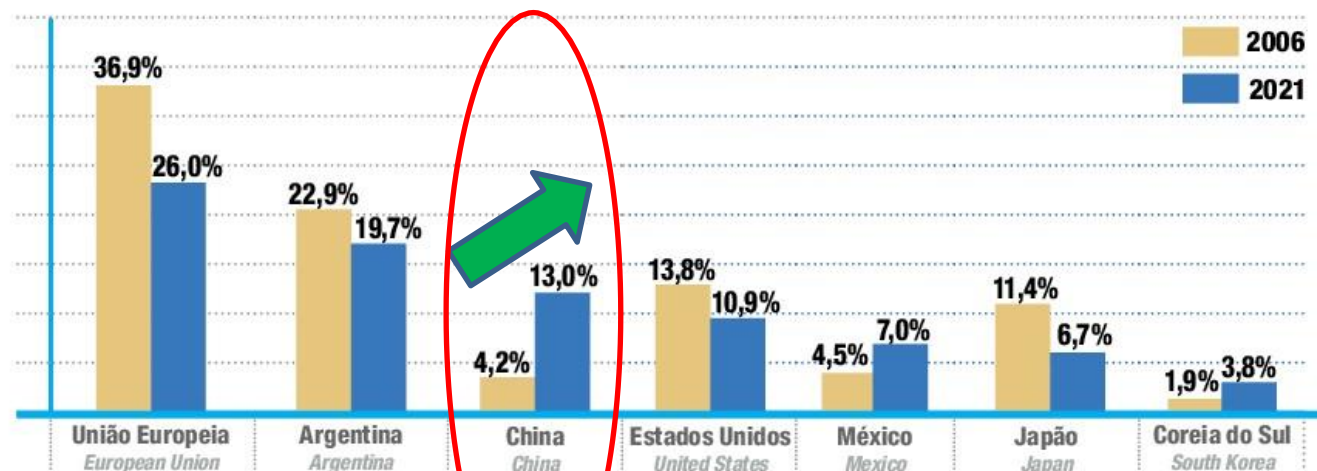
**EXPORTAÇÕES AUTOMOTIVAS -
PRINCIPAIS DESTINOS - 2006 E 2021**

*AUTOMOTIVES EXPORTS - MAJOR
DESTINATIONS - 2006 AND 2021*



**IMPORTAÇÕES AUTOMOTIVAS -
PRINCIPAIS ORIGENS - 2006 E 2021**

*AUTOMOTIVE IMPORTS - MAJOR ORIGINS
- 2006 AND 2021*



Indian exports to Brazil, according to main products – selected periods (in US\$ Million and %)

Products	US\$ Million			Contribution to growth (%)		Market-share in Brazilian imports		
	2000-02(A)	2012-14(B)	2017-19(C)	(B)/(A)	(C)/(B)	2000-02	2012-14	2017-19
Refined petroleum	44,4	3.555,5	226,2	56,8	-113,5	5,5	15,7	1,7
Basic chemicals	61,4	364,8	474,4	4,9	3,7	2,3	5,2	7,7
Pesticides and agrochemical products	8,8	307,8	544,8	4,8	8,1	3,7	3,6	5,4
Pharmaceuticals	44,1	279,3	406,2	3,8	4,3	1,7	24,4	24,9
Synthetic filament yarn	7,0	252,5	252,3	4,0	-0,0	0,1	2,0	2,0
Parts and accessories for motor vehicles	1,8	↑ 217,9	↑ 290,5	3,5	2,5	5,7	6,9	4,0
Wearing apparel	6,9	169,0	76,8	2,6	-3,1	0,0	4,8	11,3
Machinery and equipment	15,7	68,6	91,3	0,9	0,8	0,2	1,1	1,3
Textiles	8,9	107,5	81,5	1,6	-0,9	2,6	6,2	6,5
Iron and steel	4,1	103,1	104,7	1,6	0,1	0,6	1,9	4,0
Other fabricated metal products	1,5	70,3	76,8	1,1	0,2	0,2	2,0	2,6
Aluminum	-	12,0	89,9	0,2	2,7	-	6,9	13,3
Other products	52,4	926,0	784,8	14,1	-4,8	0,2	0,7	0,9
Total	257,0	6.434,4	3.500,3	100,0	100,0	0,5	1,1	0,9



Not even in Top 5 importer List

Source: Comtrade/UNCTAD.

Political-Commercial Cooperation Agreement between the Governments of Brazil and India



1. Action Plan to Strengthen the Strategic Partnership between Brazil and India.
2. Investment Cooperation and Facilitation Agreement (ACFI).
3. Memorandum of Understanding in the Area of Cybersecurity.
4. Social Security agreement.
5. Memorandum of Understanding on Cooperation in Bioenergy
6. Memorandum of Understanding on Geology and Mineral Resources.
7. Memorandum of Understanding on Cooperation in the Health and Medical Sciences Area.
8. Memorandum of Understanding for Cooperation in the Area of Traditional Medicine and Homeopathy.
9. Memorandum of Understanding between Ministries of Citizenship for Early Childhood.
10. Memorandum of Understanding for Cooperation in the Oil and Natural Gas sector.
11. Executive Cultural Exchange Program (2020-2024).
12. Scientific and Technological Cooperation Program (2020-2023) .
13. Mutual Legal Cooperation Agreement in Criminal Matters.
14. Memorandum of Understanding on Cooperation to establish Center of Excellence in India to Conduct Bioenergy Research.

Indian Prime Minister Narendra Modi announced the signing of 15 bilate agreements between Brazil and India

Year	Indian Exports to Brazil	Indian Imports from Brazil	Total Trade	Balance of Trade (from the Indian perspective)
2015	4.29	3.62	7.91	1.18
2016	2.48	3.16	5.64	- 0.679
2017	2.95	4.66	7.61	- 1.71
2018	3.66	3.91	7.52	- 0.246
2019	4.257	2.763	7.02	1.494

*Values are in USD billion, source: Brazilian Ministry of Economy

Collaboration in the area of Livestock and Dairy Production.

Year	India's Exports	India's Imports	Balance of Trade for India	Total trade	Growth%
2008	3,564	1,102	2,461	4,666	49.23
2009	2,191	3,415	-1,224	5,605	20.12
2010	4,242	3,492	750	7,734	37.97
2011	6,081	3,201	2,880	9,282	20.00
2012	5,043	5,577	-544	10,620	14.41
2013	6,357	3,130	3,227	9,487	-10.67
2014	6,635	4,789	1,846	11,424	20.40
2015	4,289	3,617	672	7,907	-30.78
2016	2,480	3,160	-680	5,640	-28.62

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Queries?

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