

Desempenho da Indústria Automobilística Brasileira



Julho de 2019

Presidente - Luiz Carlos Moraes





Cenário Macroeconômico



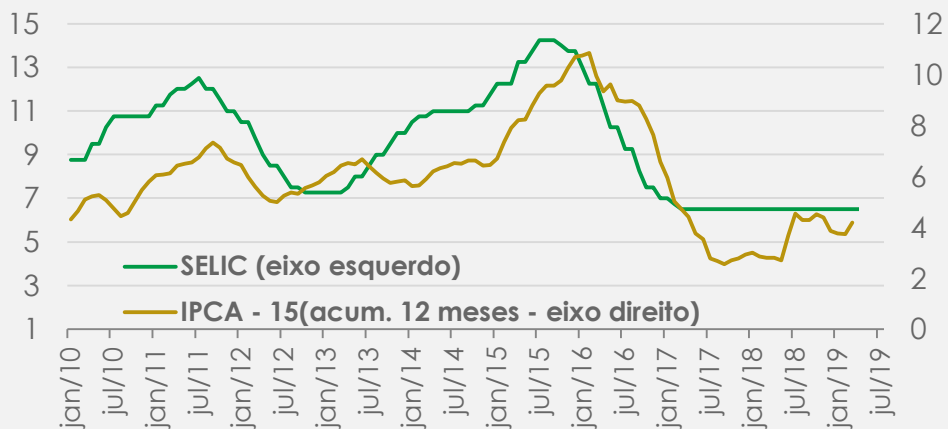
Câmbio e Risco



Fontes: Bloomberg e Banco Central do Brasil (BCB)



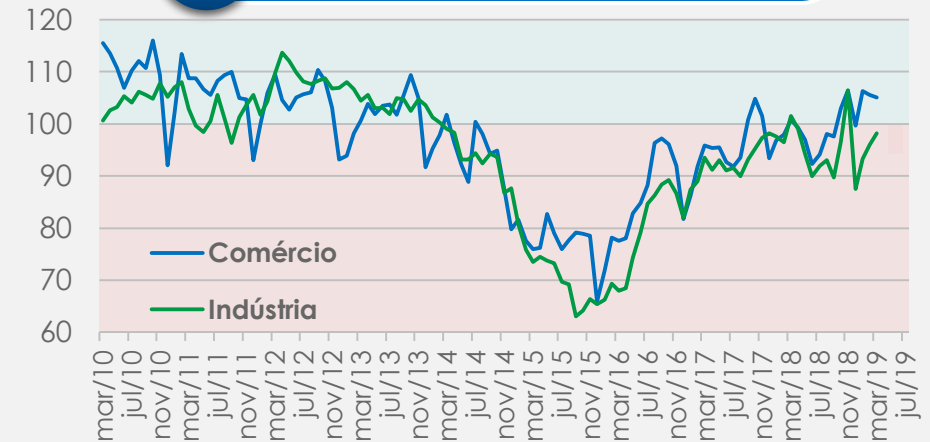
Inflação



Fontes: Instituto Brasileiro de Geografia e Estatística (IBGE) e Banco Central do Brasil (BCB).



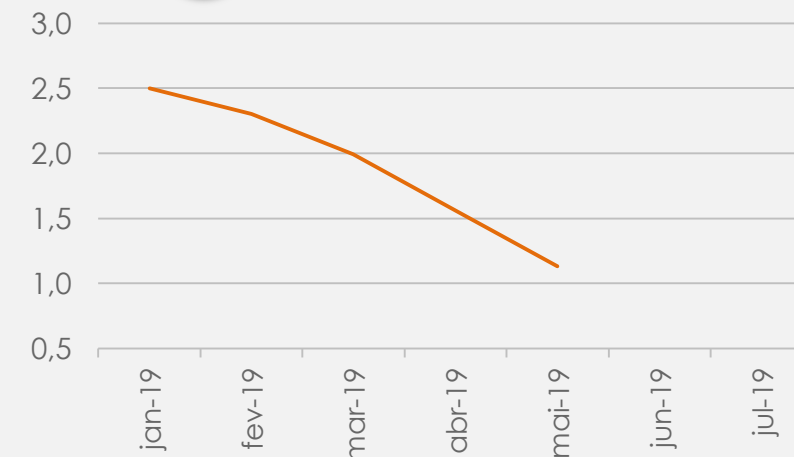
Confiança - Expectativa



Fonte: Fundação Getúlio Vargas (FGV)



PIB



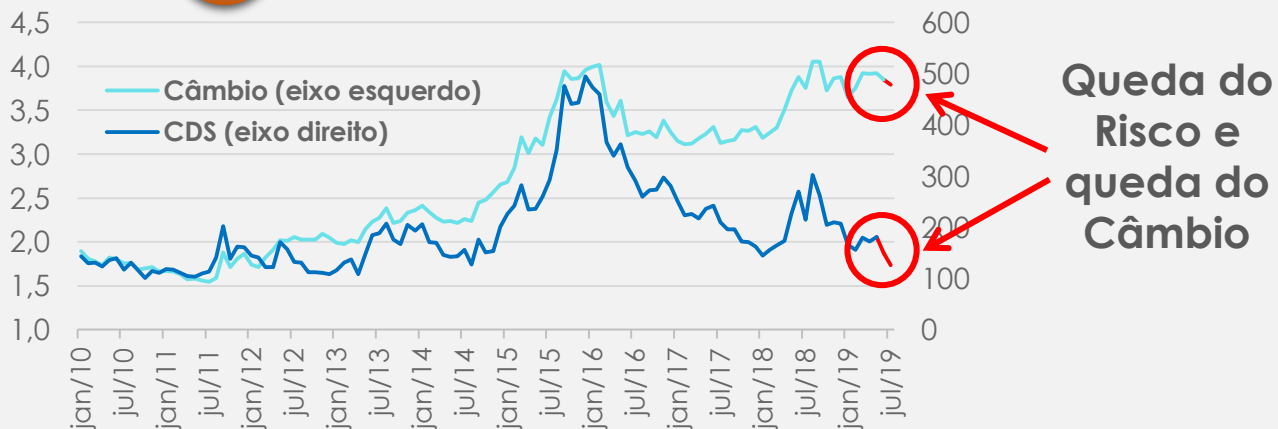
Fonte: Banco Central do Brasil (BCB)



Cenário Macroeconômico



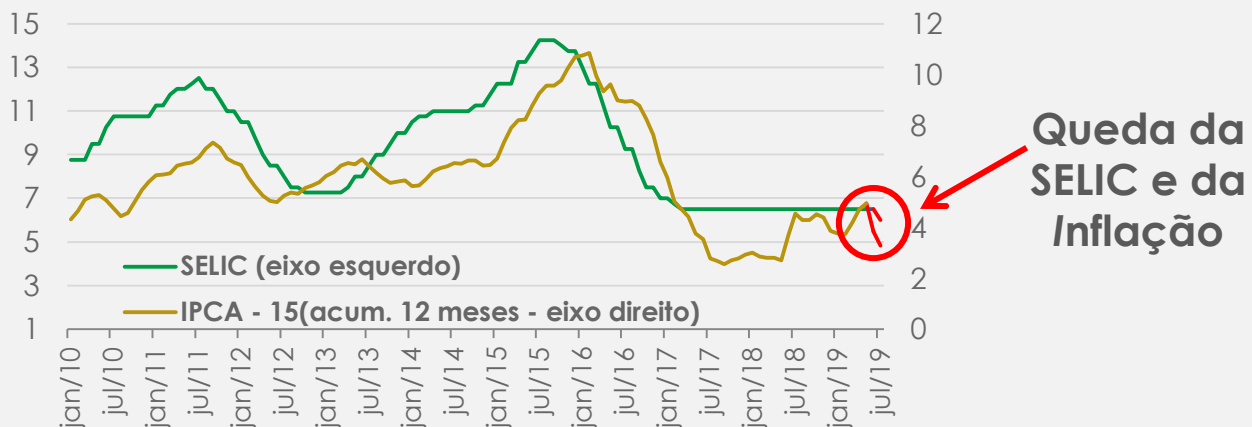
Câmbio e Risco



Fontes: Bloomberg e Banco Central do Brasil (BCB)



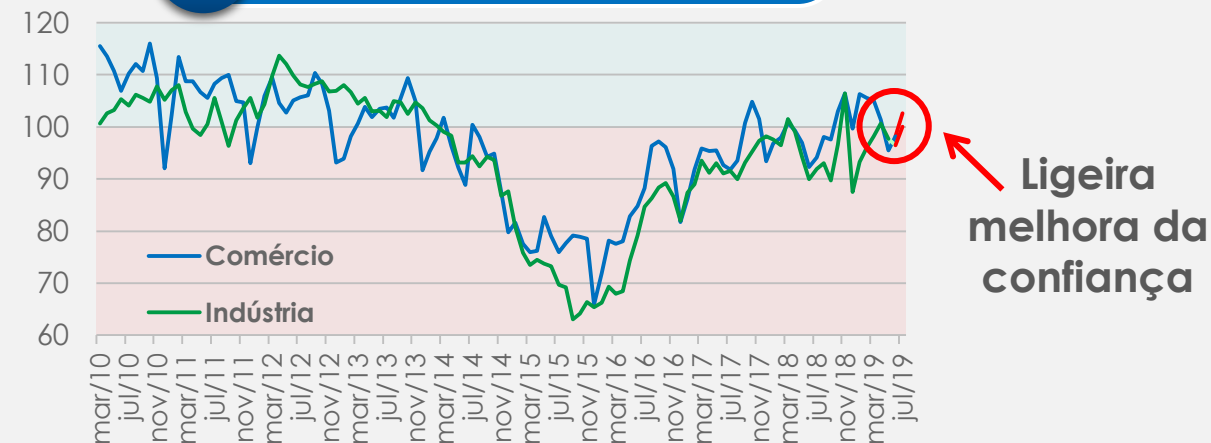
Inflação



Fontes: Instituto Brasileiro de Geografia e Estatística (IBGE) e Banco Central do Brasil (BCB).



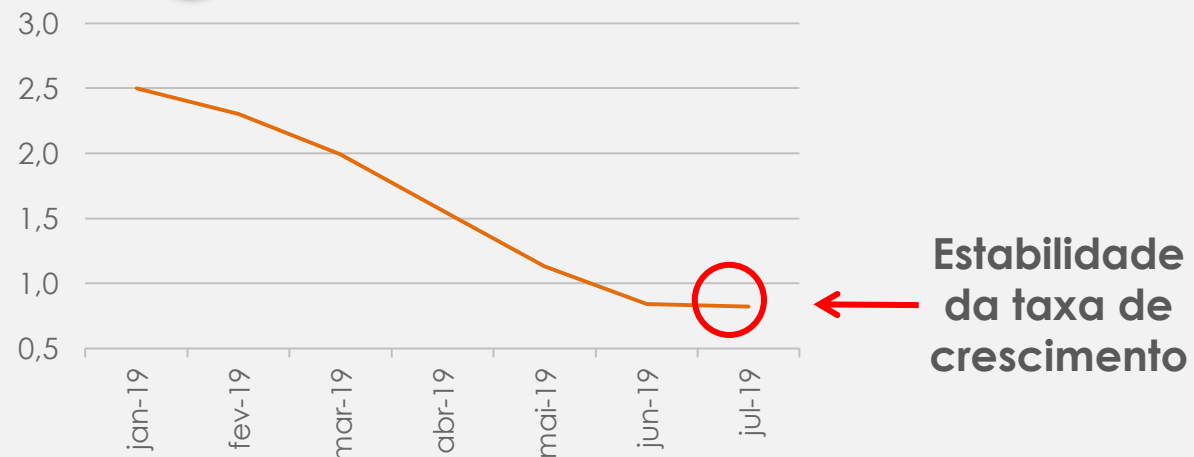
Confiança - Expectativa



Fonte: Fundação Getúlio Vargas (FGV)

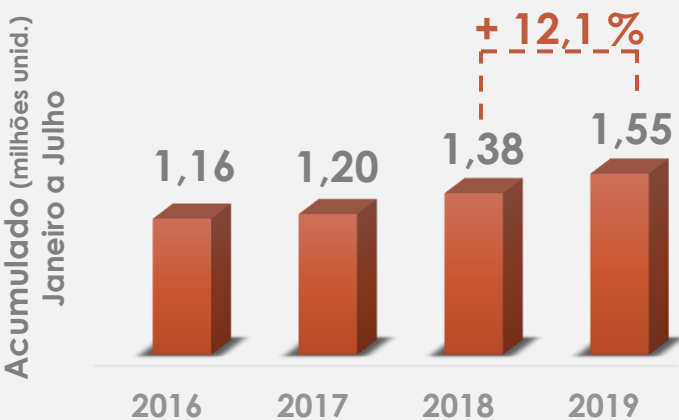
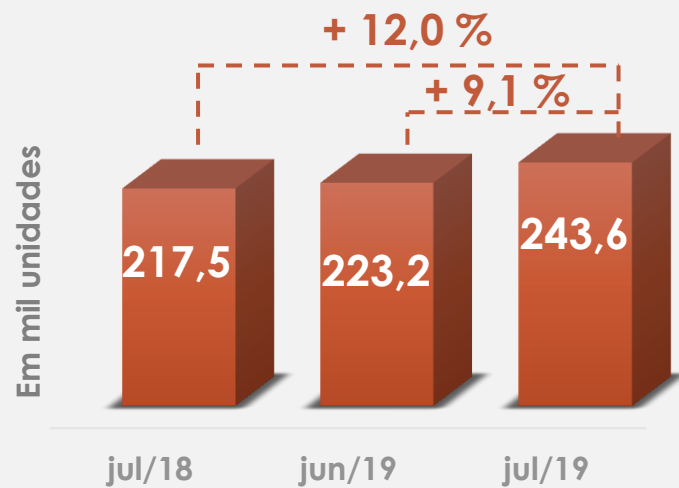


PIB

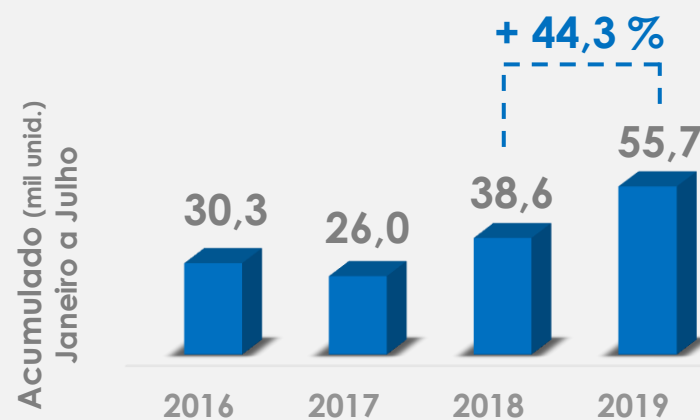
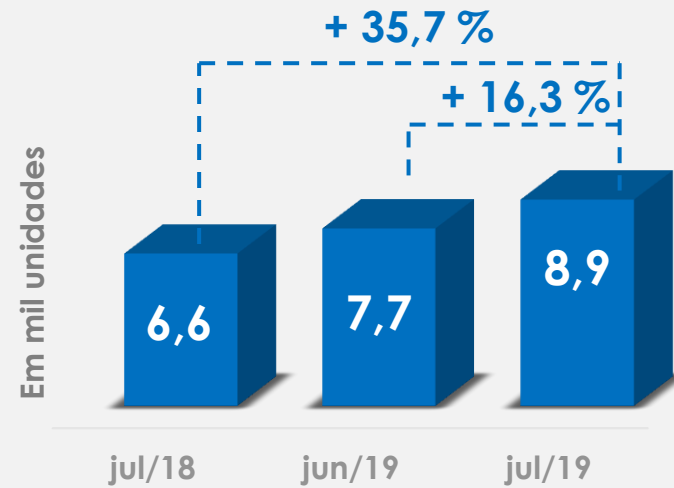


Fonte: Banco Central do Brasil (BCB)

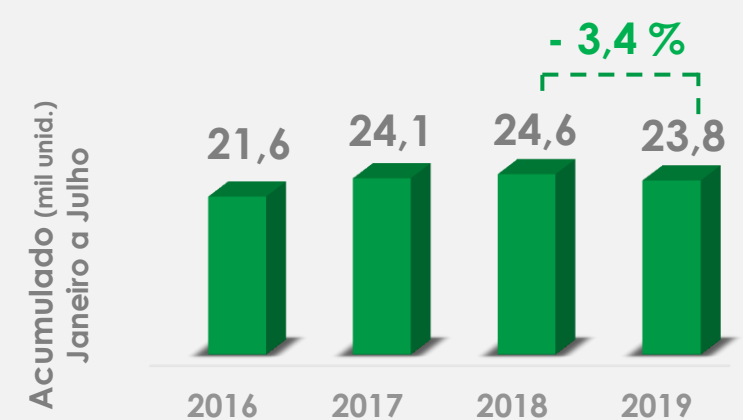
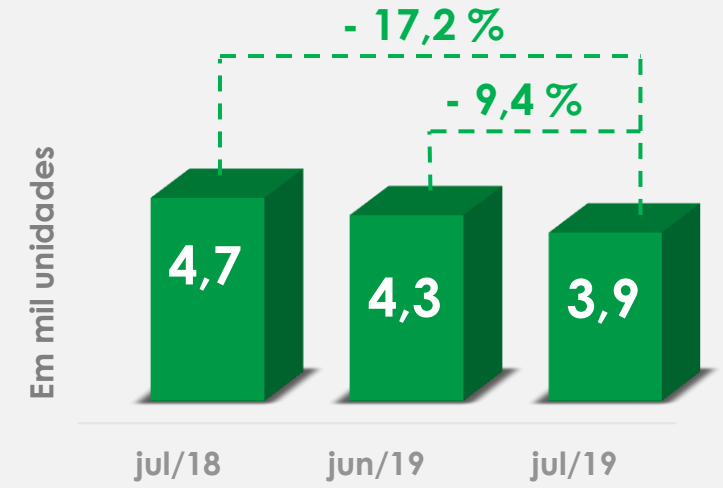
Autoveículos



Caminhões

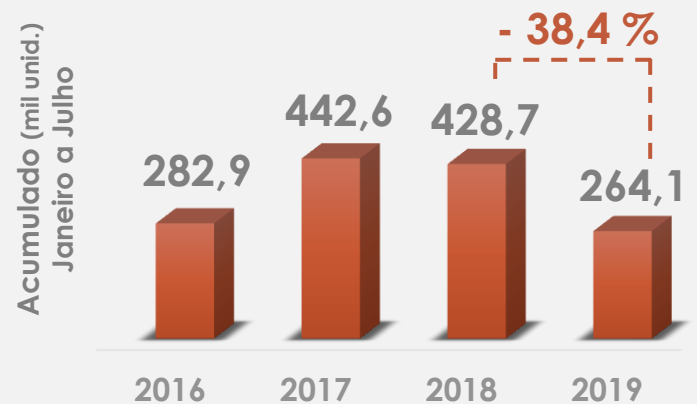
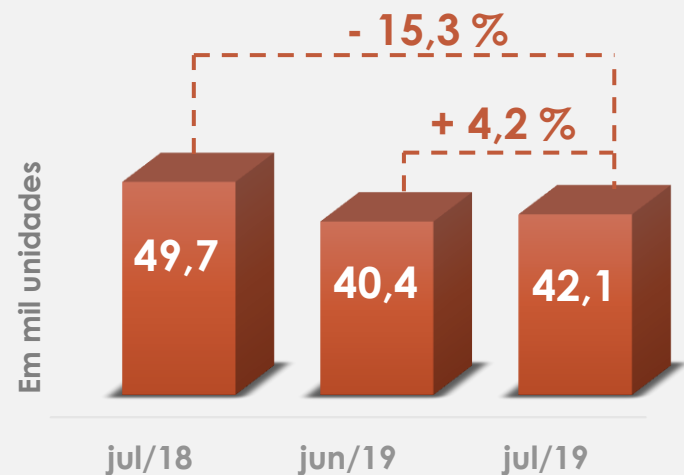


Máquinas Agrícolas e Rodoviárias

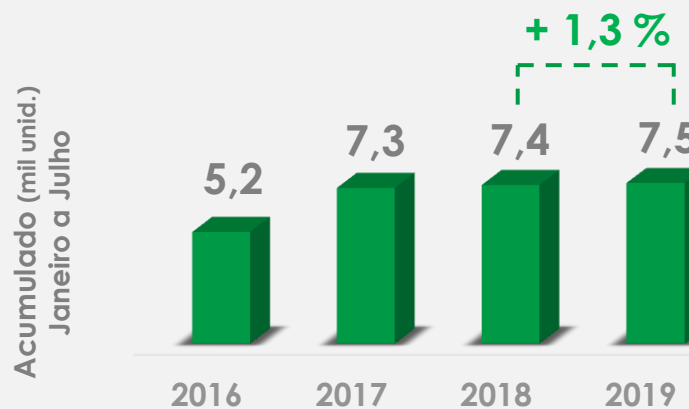
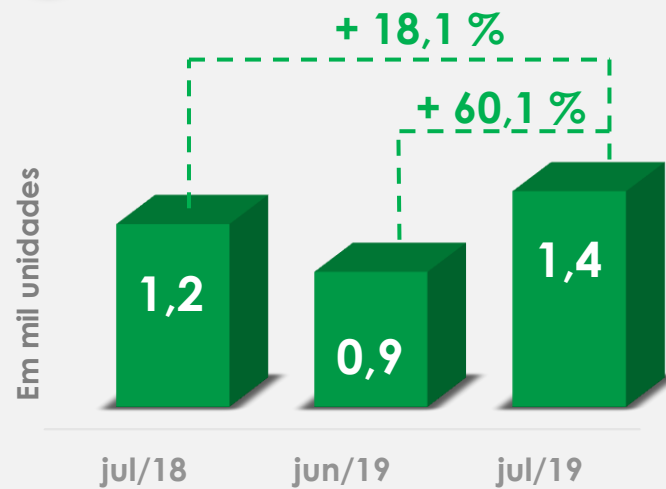




Autoveículos

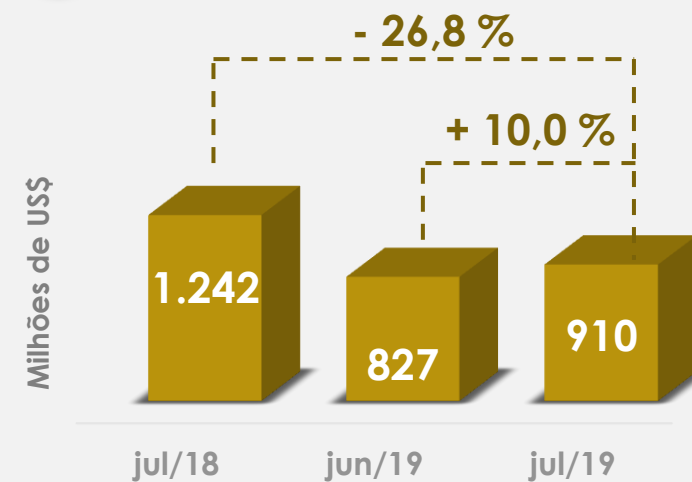


Máquinas Agrícolas e Rodoviárias



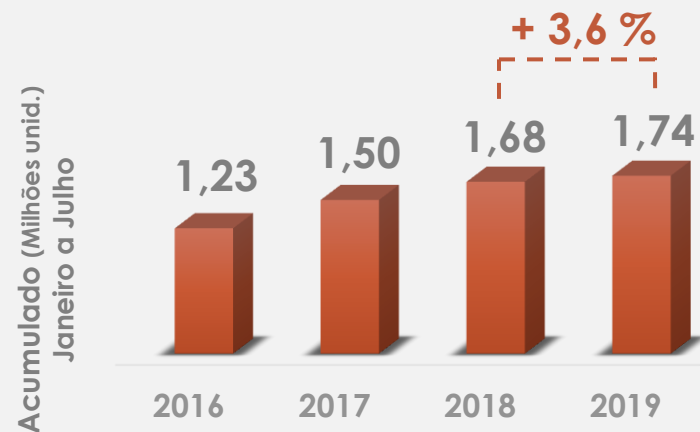
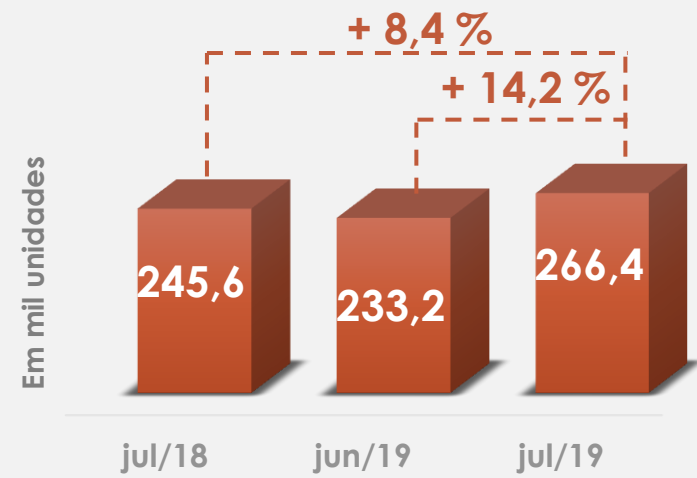
Exportações em valor

Autoveículos e máq. Agrícolas e Rodoviárias

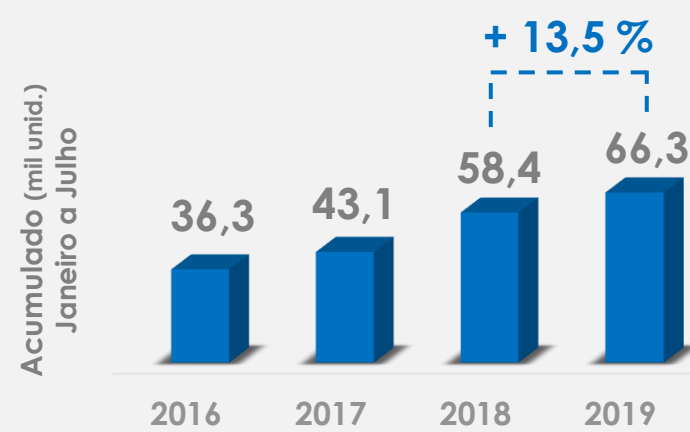
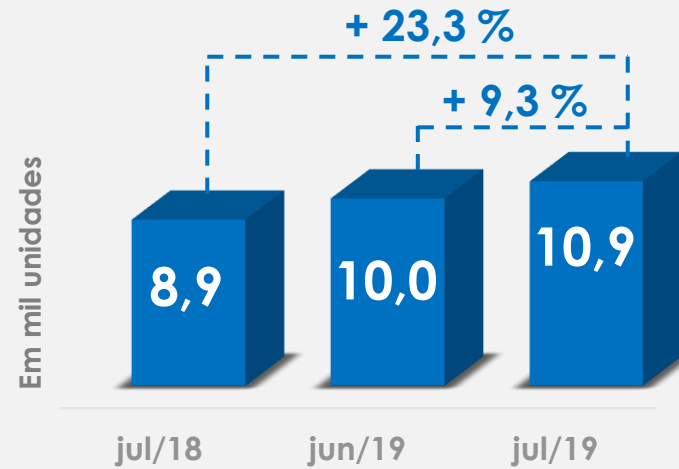




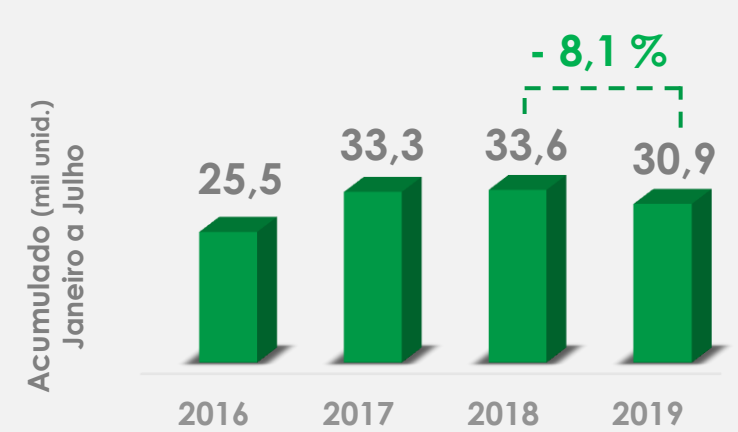
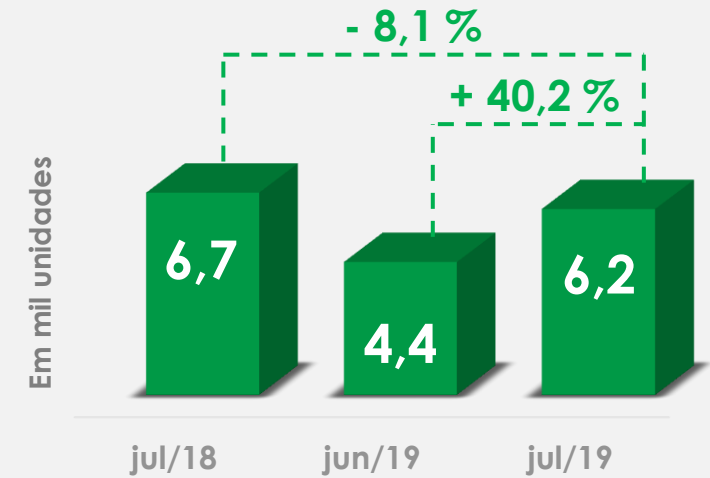
Autoveículos



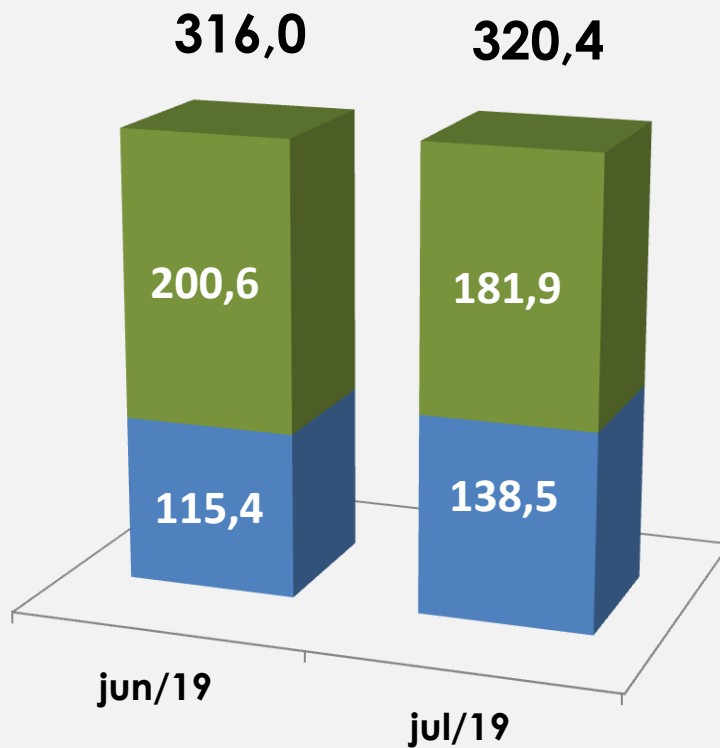
Caminhões



Máquinas Agrícolas e Rodoviárias

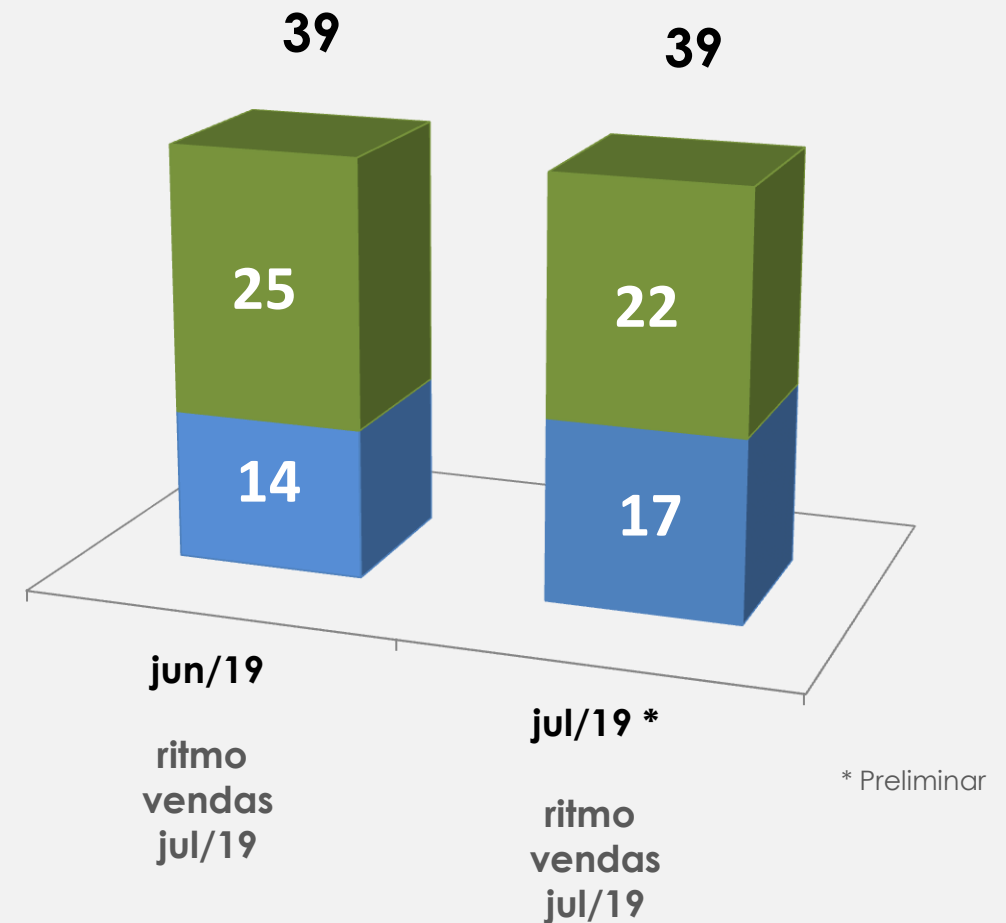


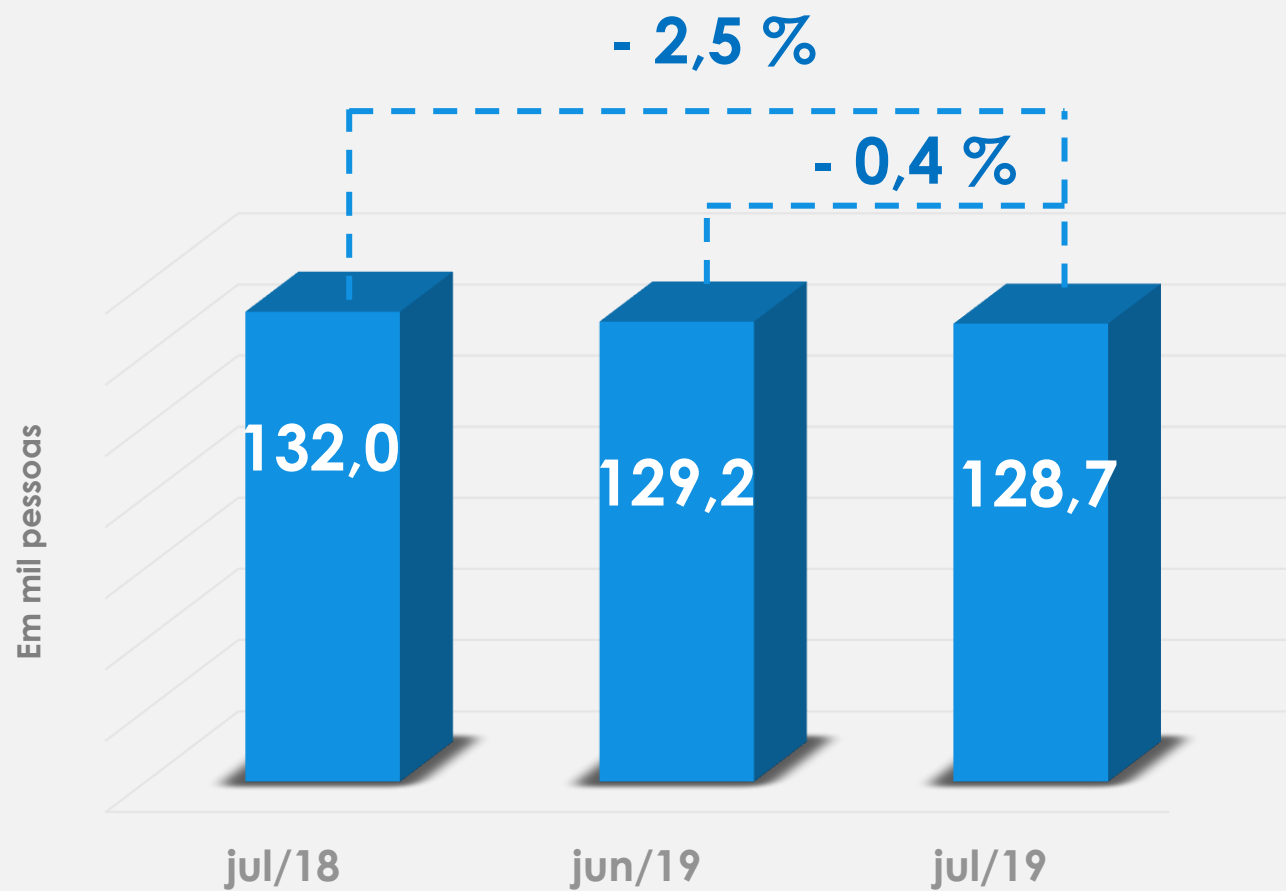
Mil unidades



■ Concessionários
■ Fábrica

Dias







Autoveículos (automóveis, comerciais leves, caminhões, ônibus)

	Mil unidades	2018	2019	Δ% 2019
Licenciamento	Total Veículos	2.566	2.860	11,4%
	Veículos leves	2.475	2.755	11,3%
	Veículos pesados	91,1	105	15,3%
Exportações	Total Veículos	629	450	-28,5%
	Veículos leves	595		
	Veículos pesados	33,7		
Produção	Total Veículos	2.880	3.140	9,0%
	Veículos leves	2.746	2.990	8,9%
	Veículos pesados	134,1	150	11,9%

Máquinas agrícolas e rodoviárias

Obs: não inclui CKD

	2018	2019	Δ% 2019
Vendas internas	47,8	53	10,9%
Exportações	12,7	13	2,5%
Produção	65,7	66	0,5%

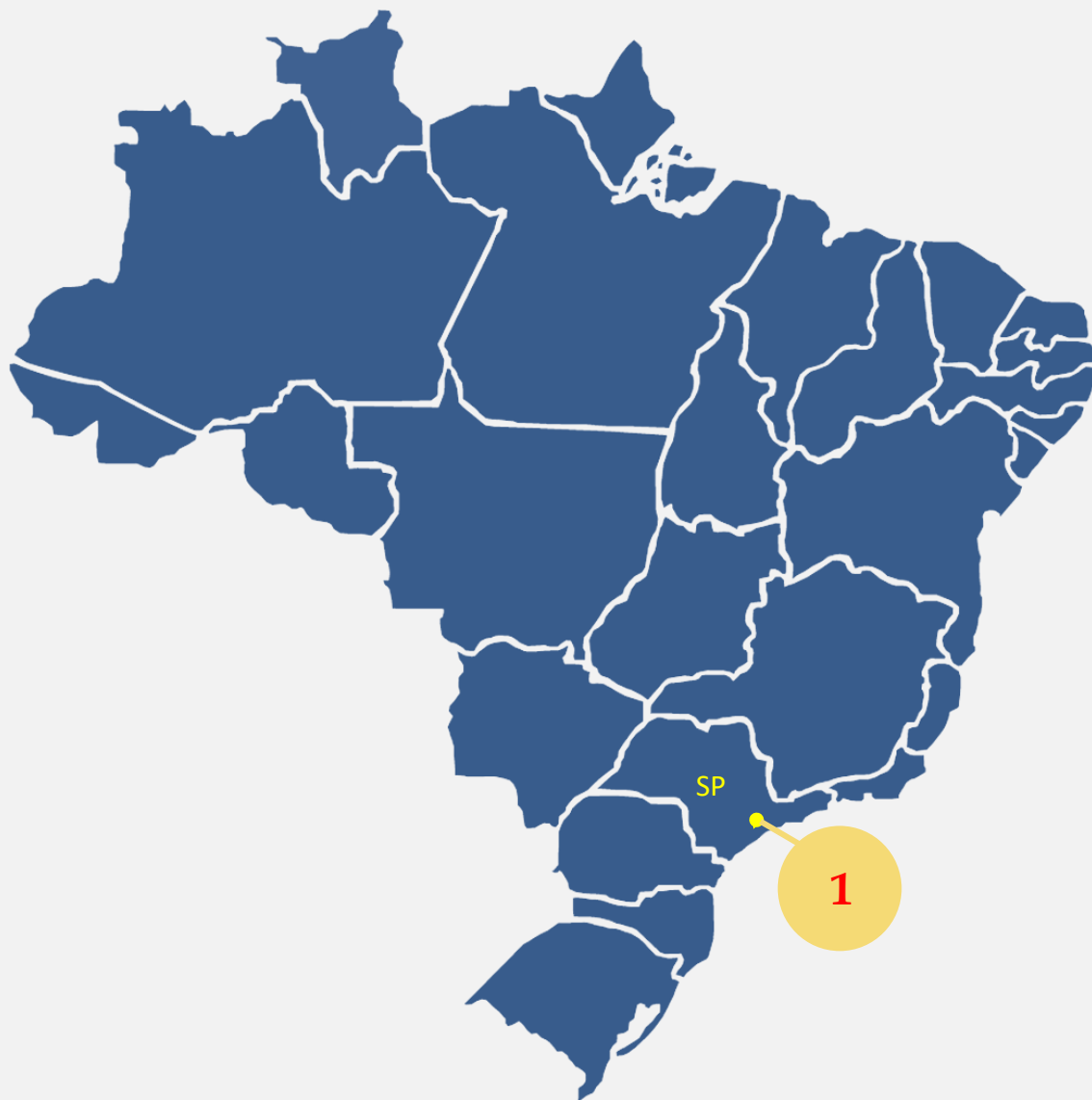
Autoveículos e Máquinas agrícolas e rodoviárias

Bilhões de US\$	2018	2019	Δ% 2019
Exportações em valor	14,5	13,9	-3,9%



1921 - 1 marca

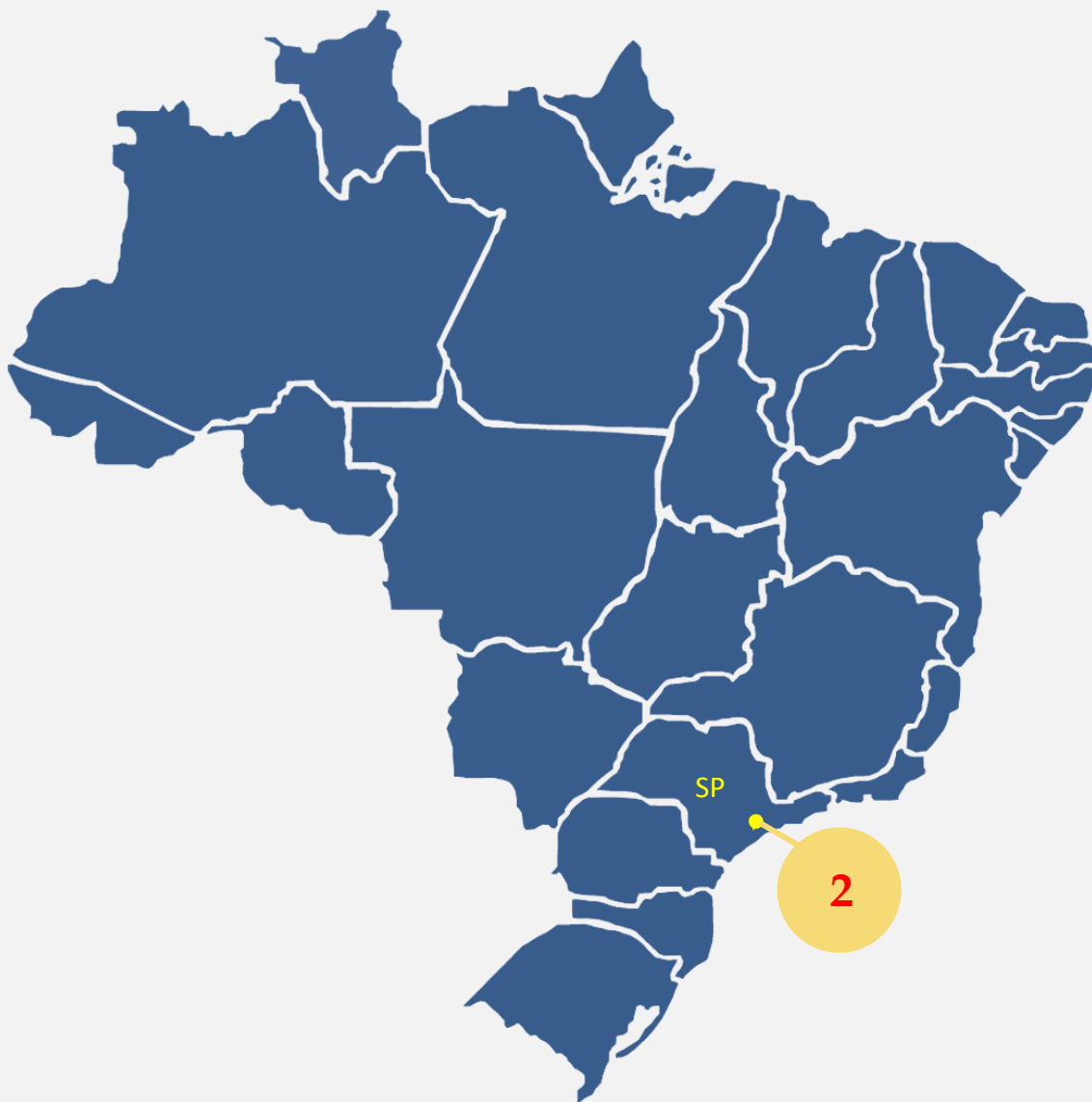
Fabricantes





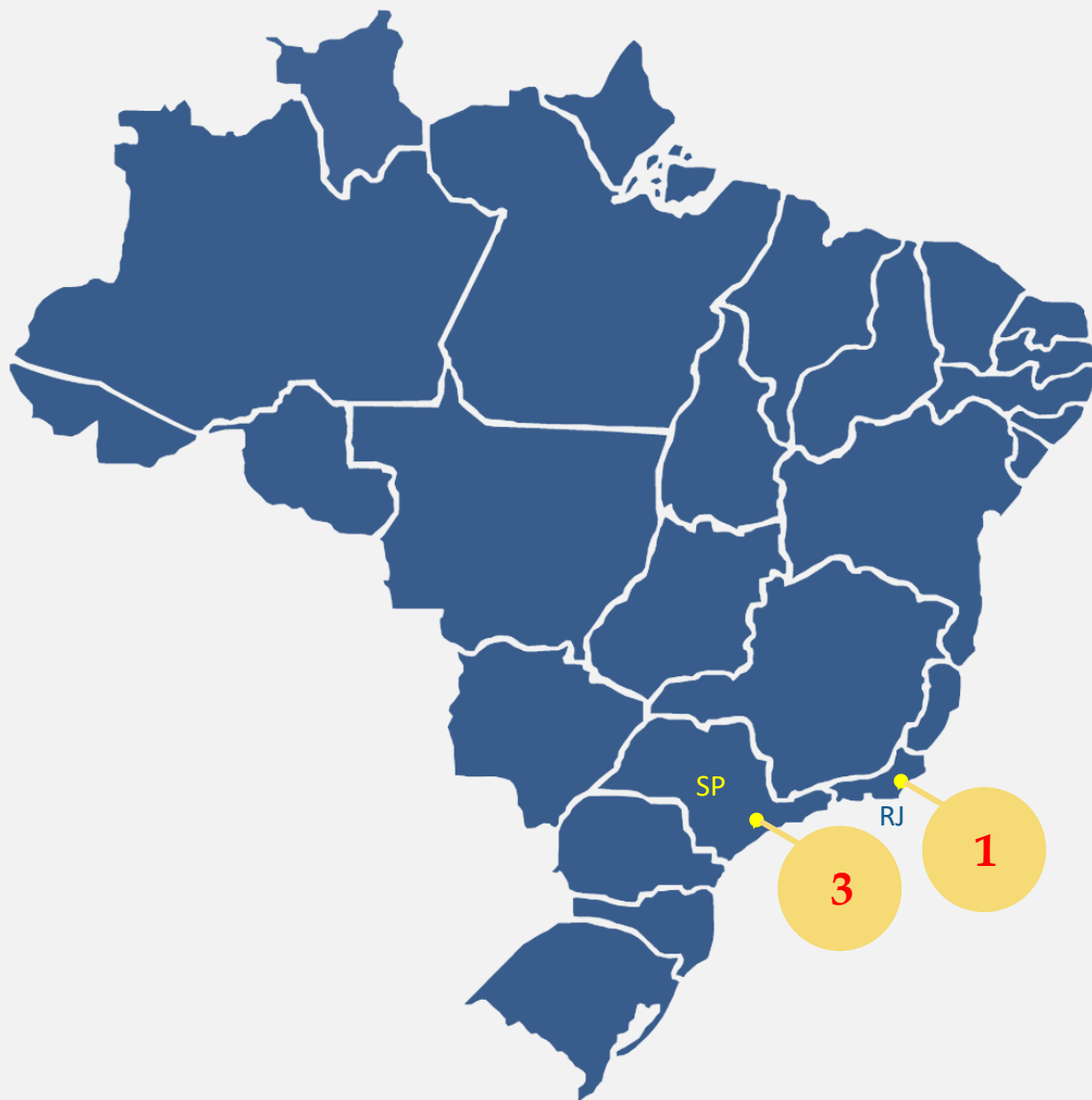
1925 - 2 marcas

Fabricantes





1949 - 4 marcas



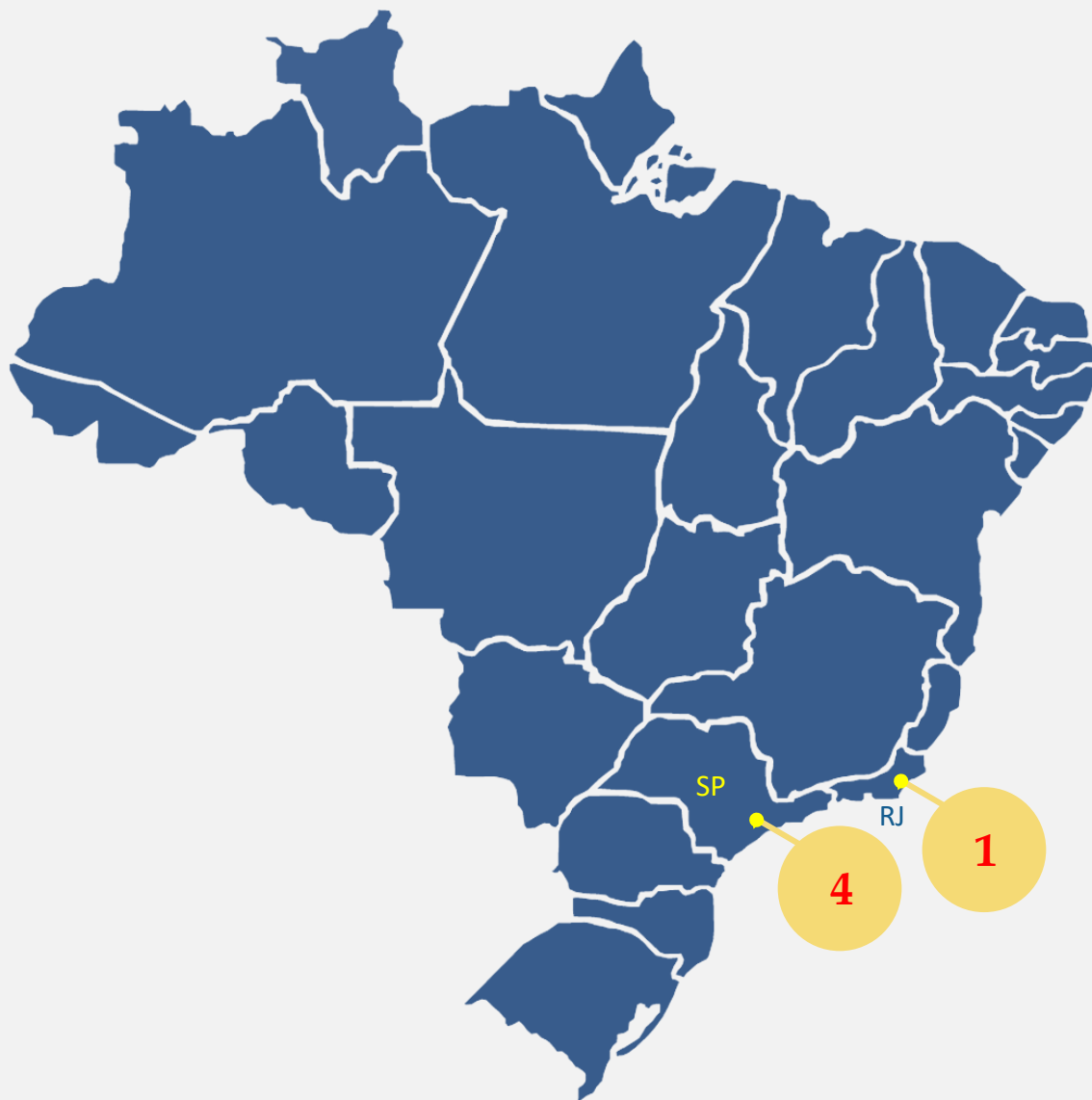
Fabricantes



VARAM MOTORES



1952 - 5 marcas



Fabricantes

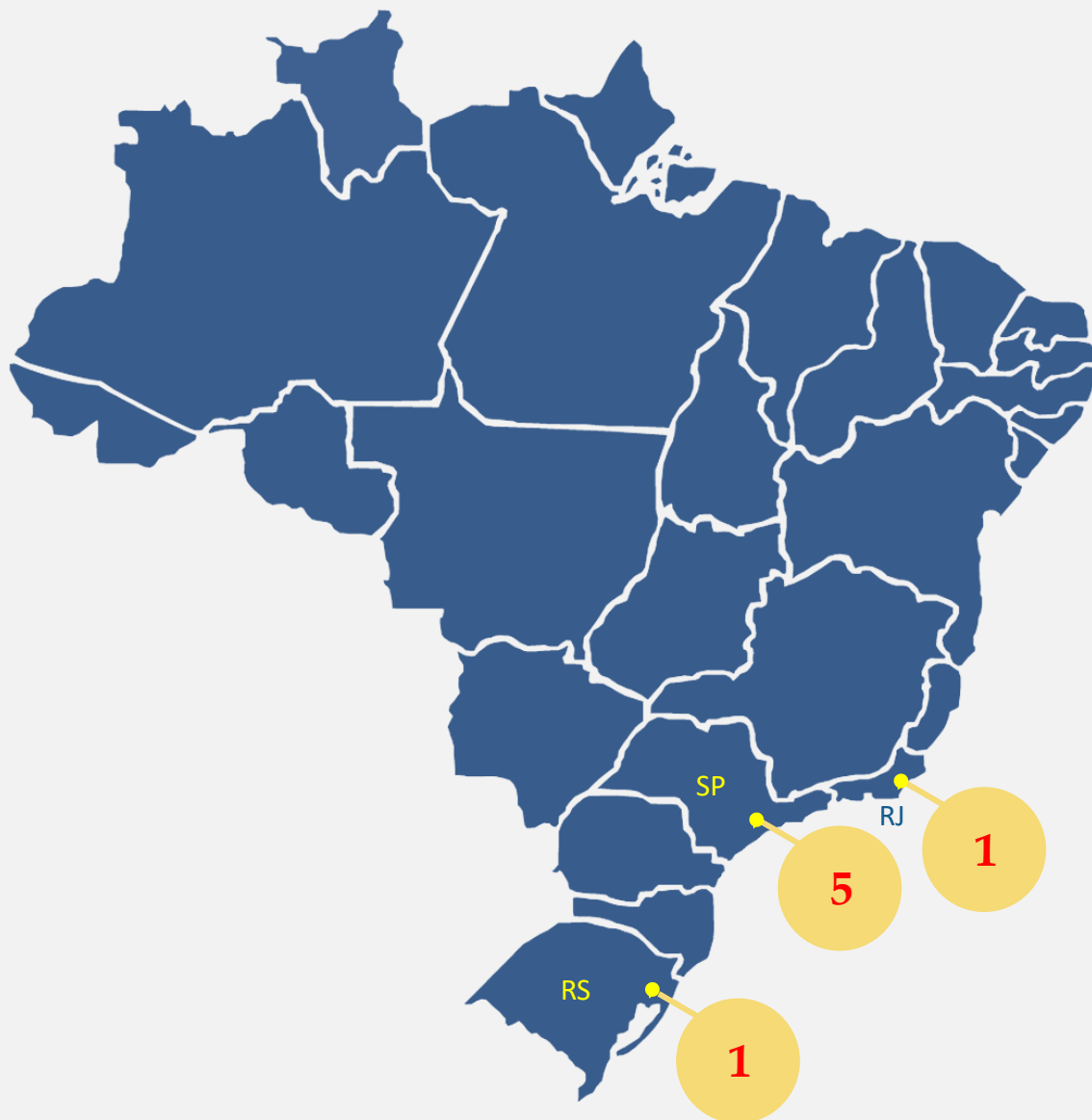


VARAM MOTORES





1953 - 7 marcas



Fabricantes



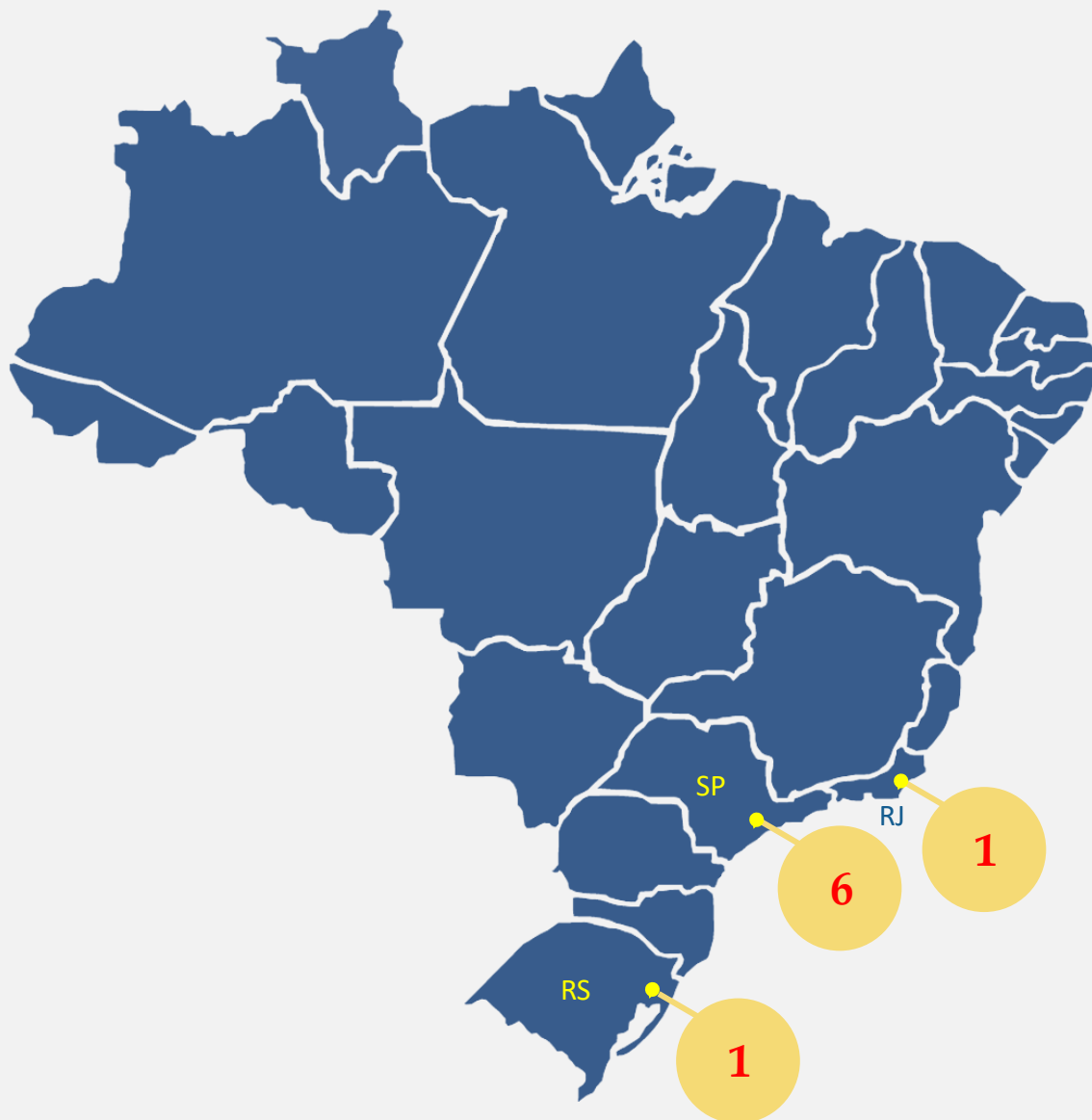
VARAM MOTORES



Indústria Ideal



1954 - 8 marcas



Fabricantes



VARAM MOTORES

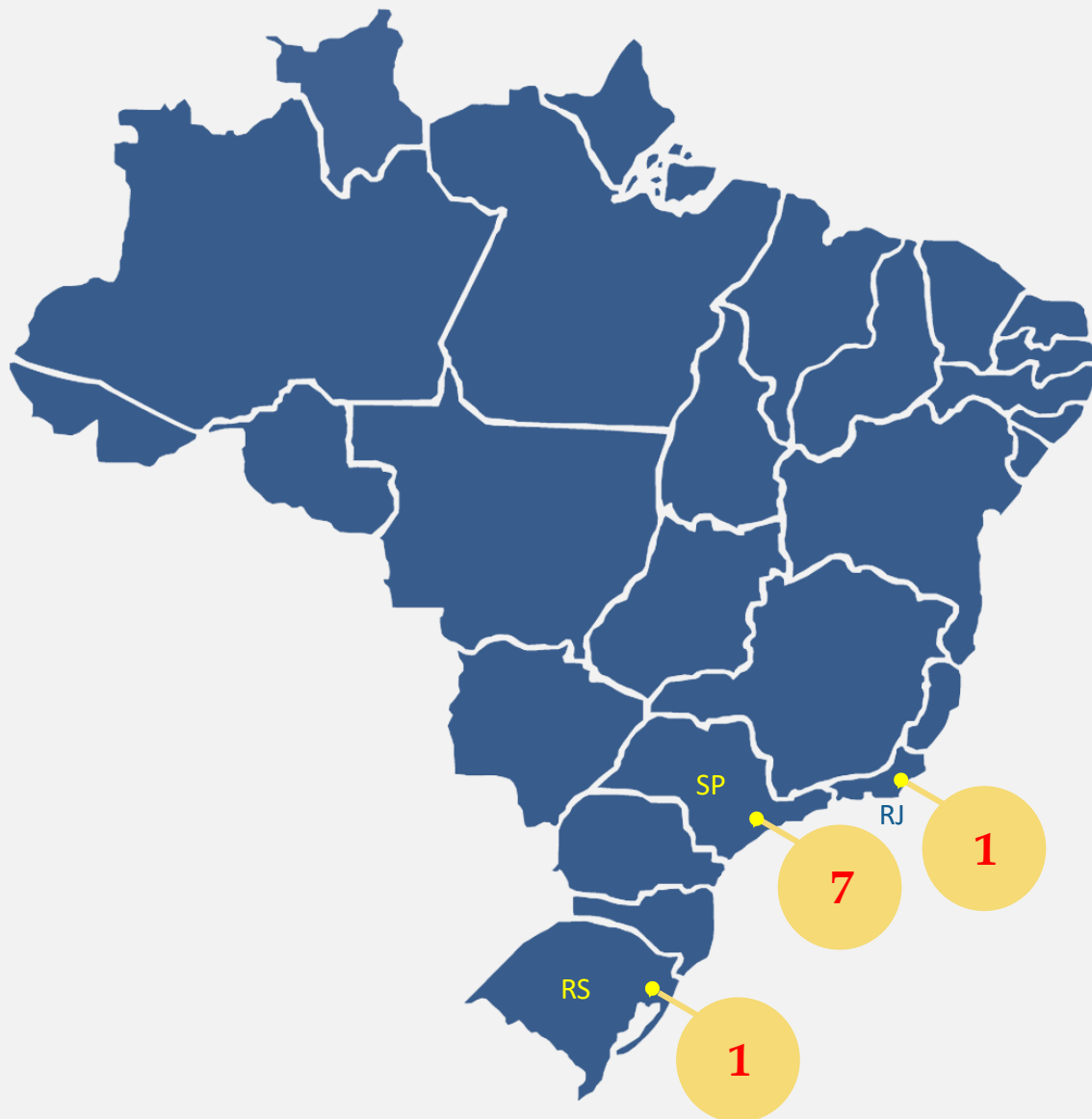


Indústria Ideal

FNV



1955 - 9 marcas



Fabricantes



VARAM MOTORES



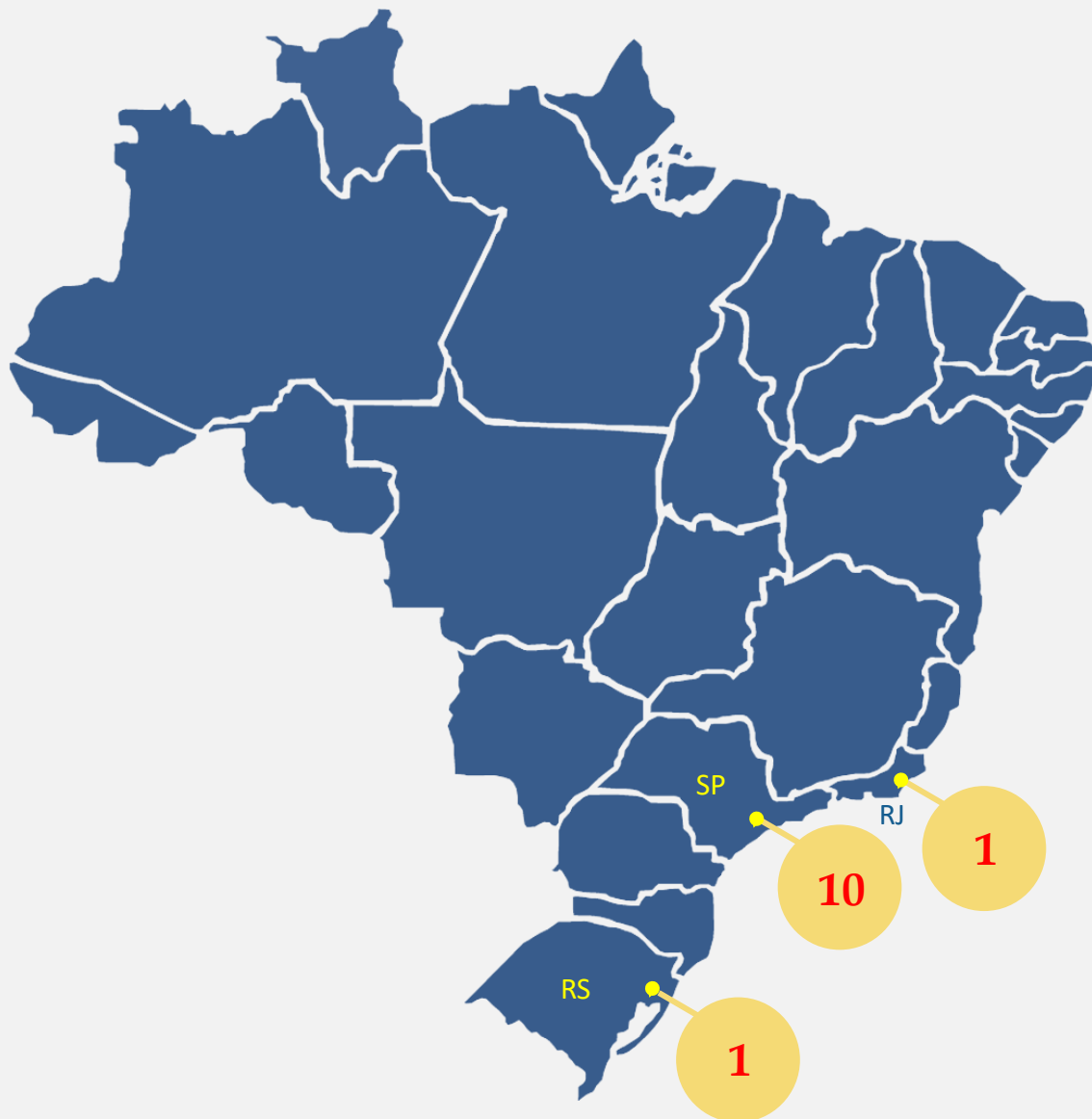
Indústria Ideal

IPNV

TRATORES DO BRASIL



1956 - 12 marcas



Fabricantes



Indústria Ideal

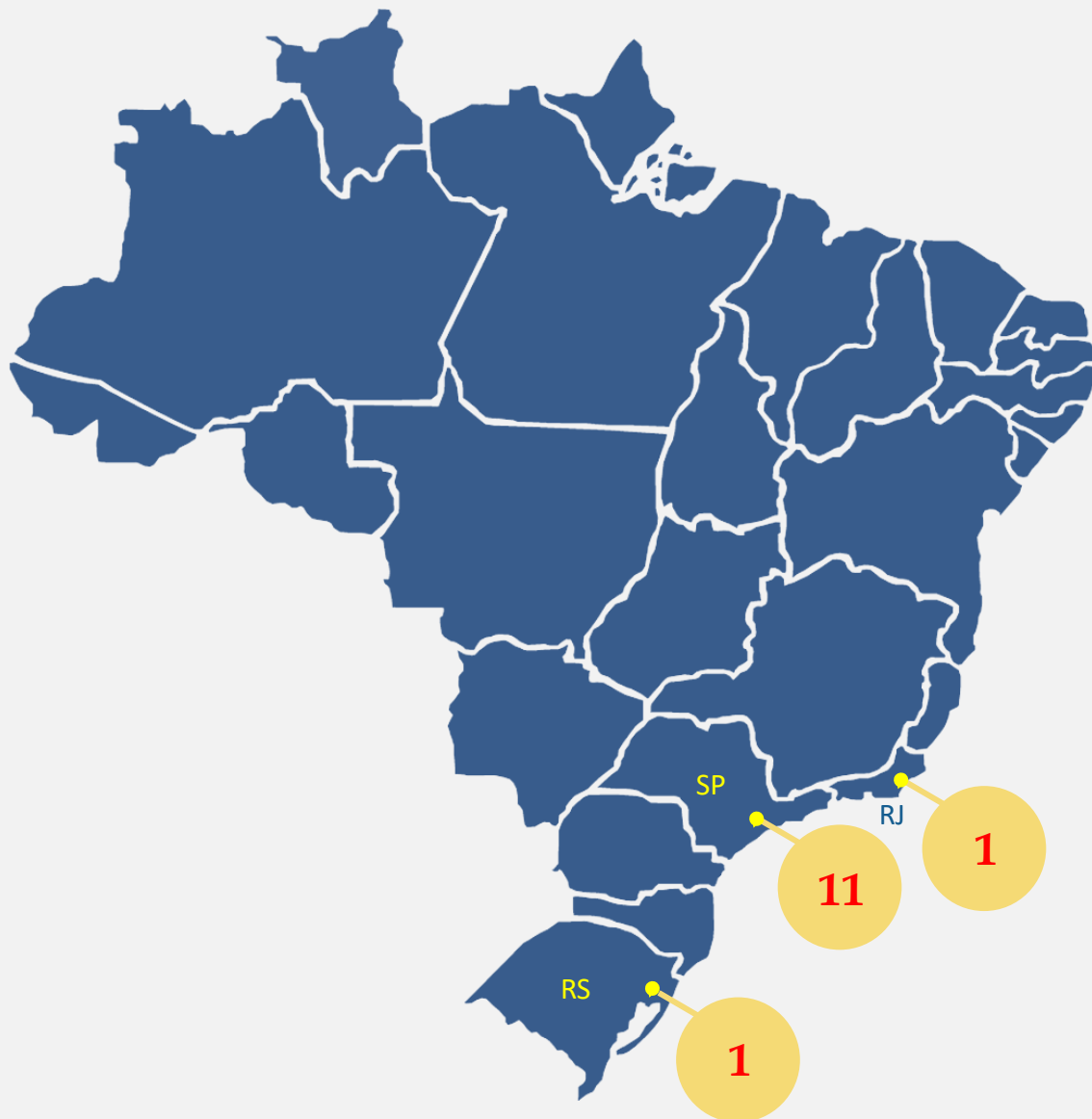


TRATORES DO BRASIL





1957 - 13 marcas



Fabricantes



Indústria Ideal

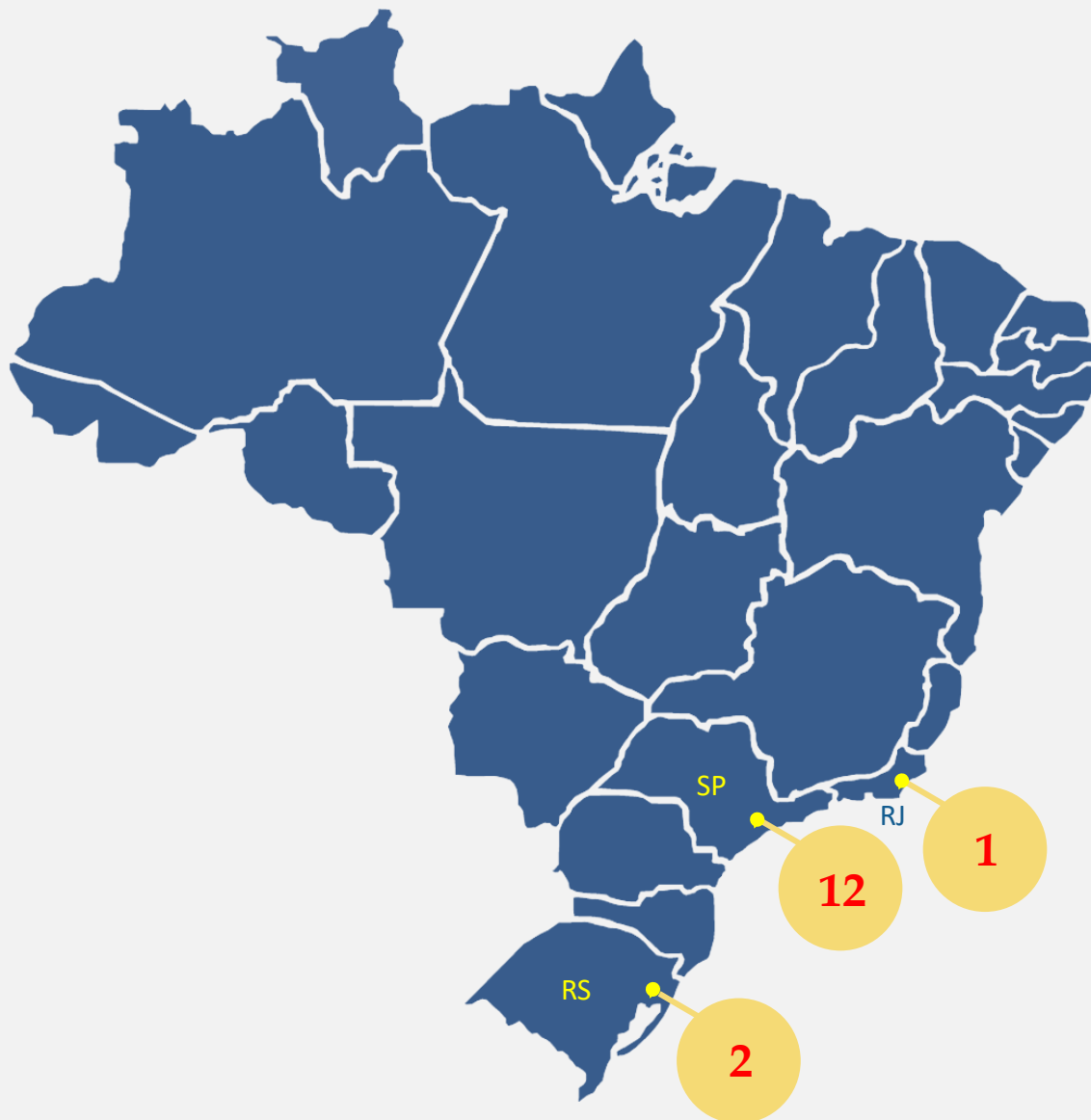


TRATORES DO BRASIL





1958 - 15 marcas



Fabricantes



Indústria Ideal

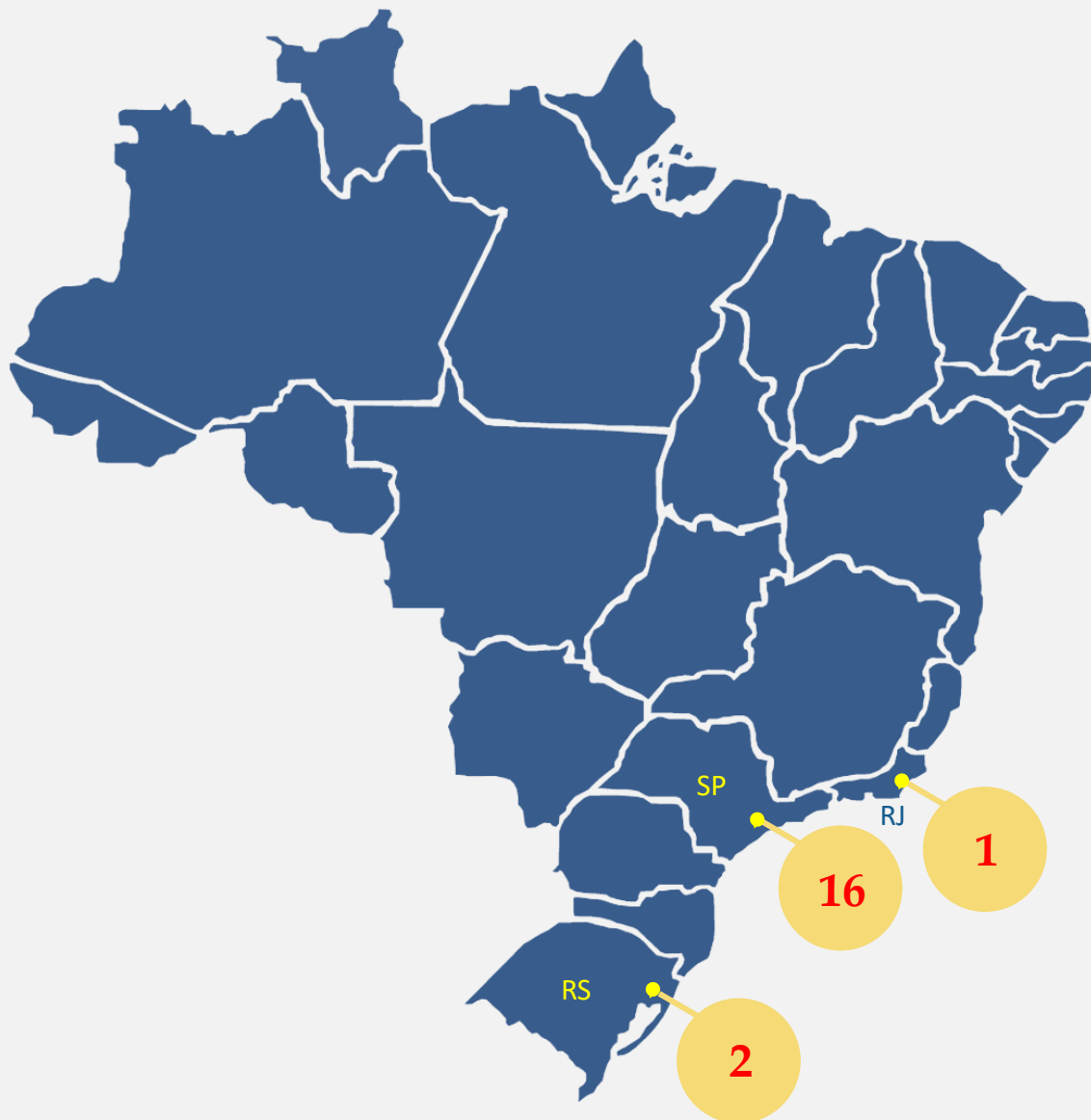


TRATORES DO BRASIL





1959 - 19 marcas



Fabricantes



Indústria Ideal

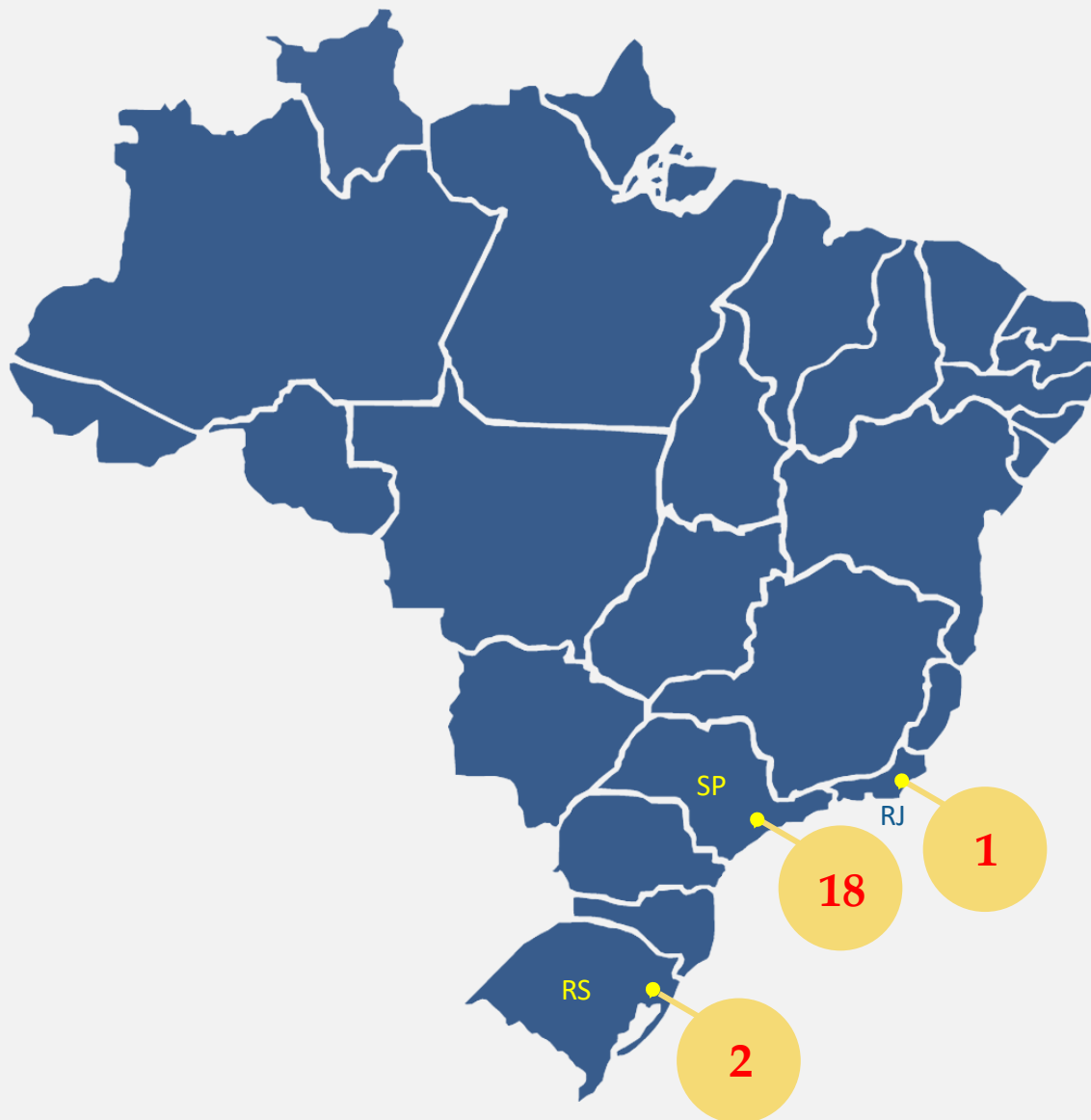


TRATORES DO BRASIL

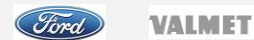




1960 - 21 marcas



Fabricantes



VALMET



Marukyu



Indústria Ideal

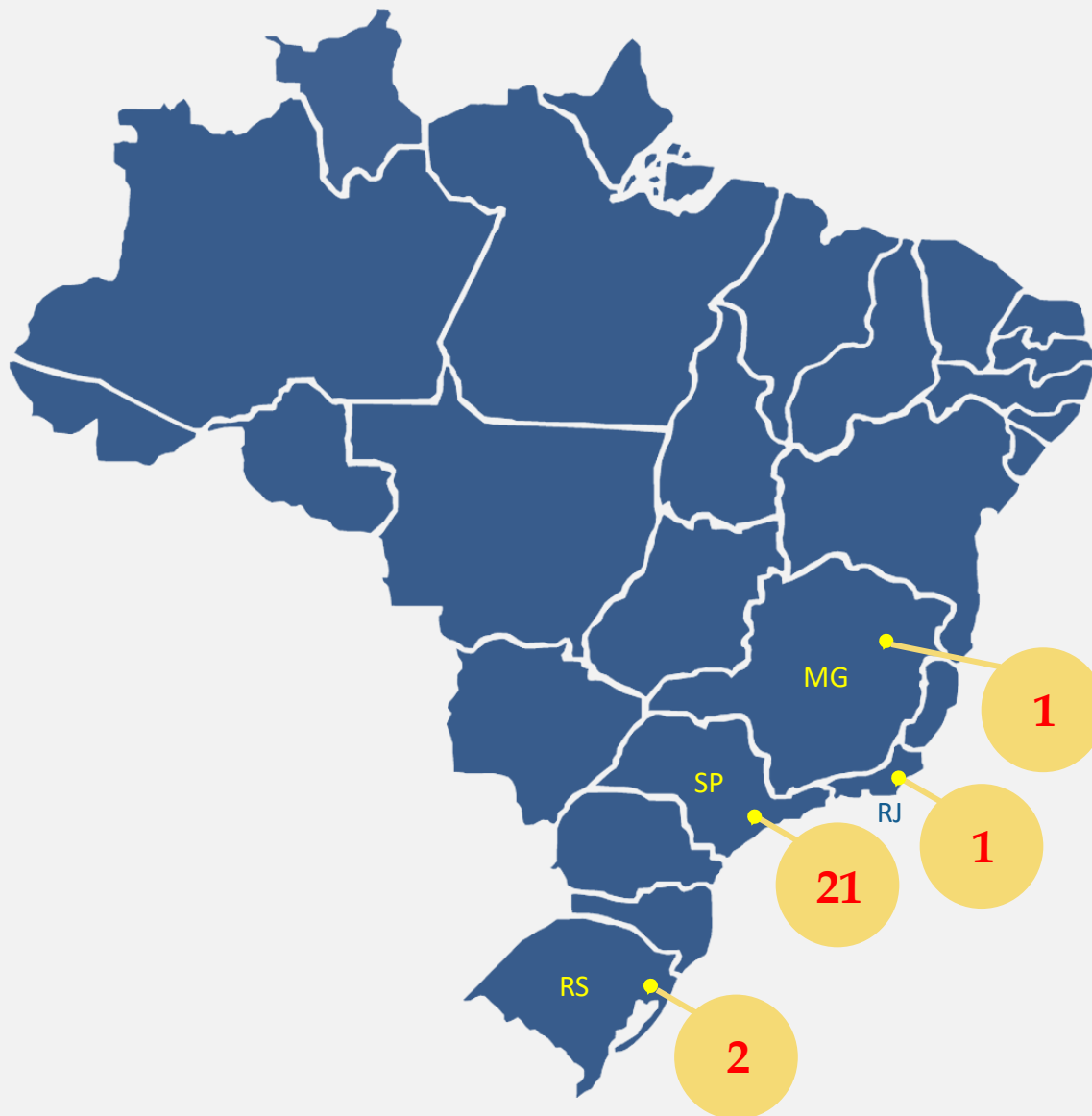


TRATORES DO BRASIL





1961 - 25 marcas

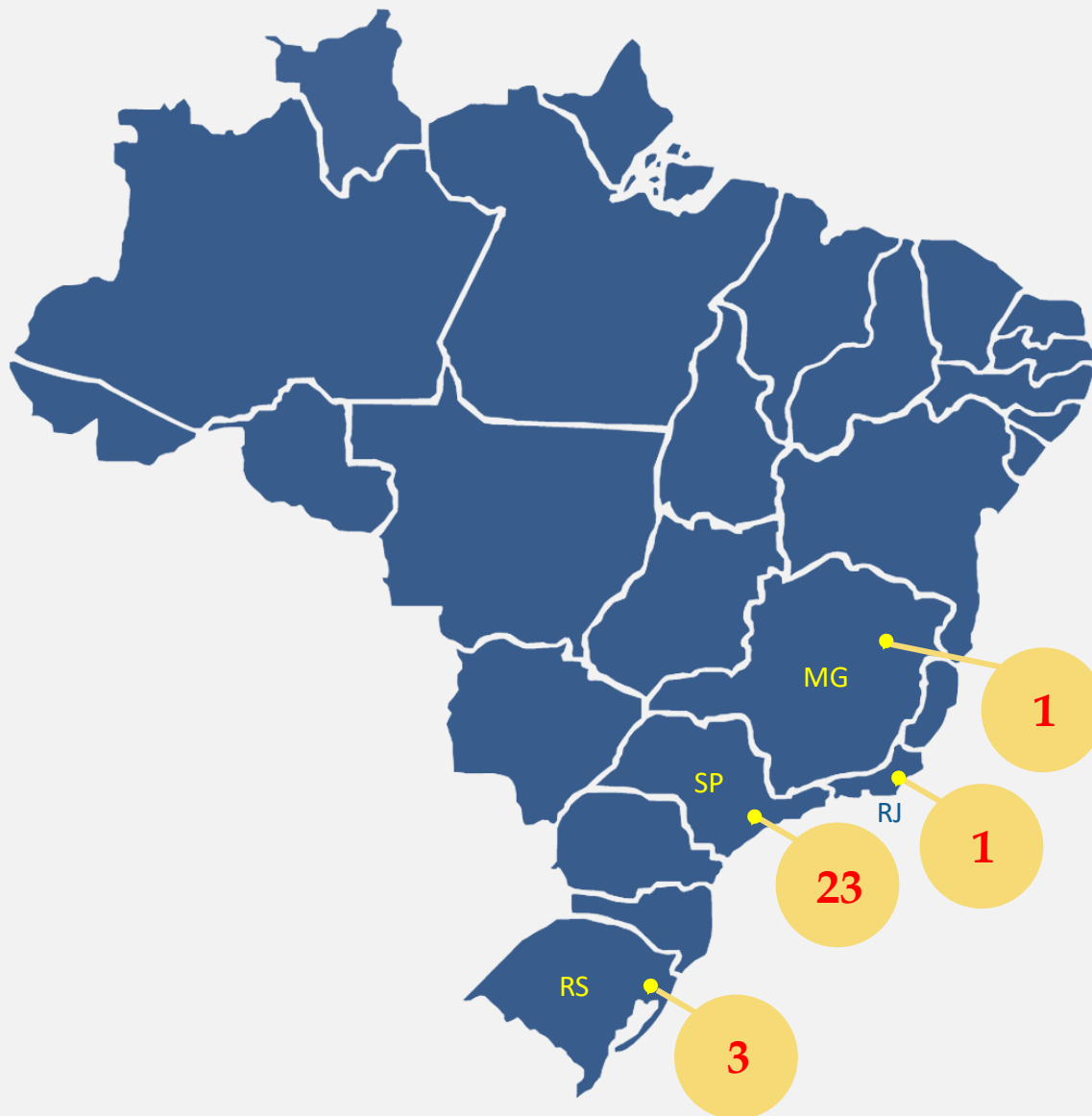


Fabricantes





1962 - 28 marcas

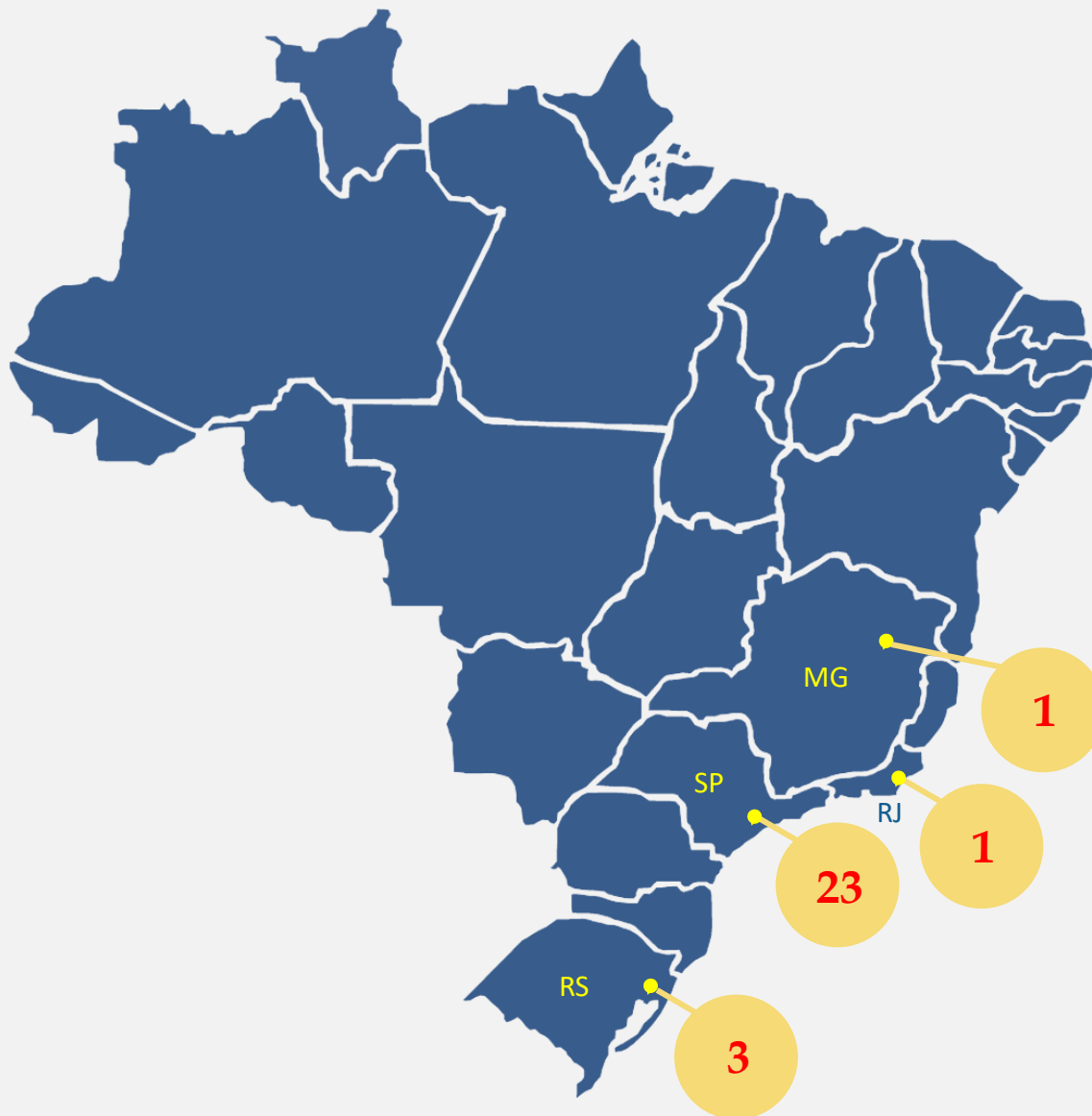


Fabricantes





1965 - 28 marcas

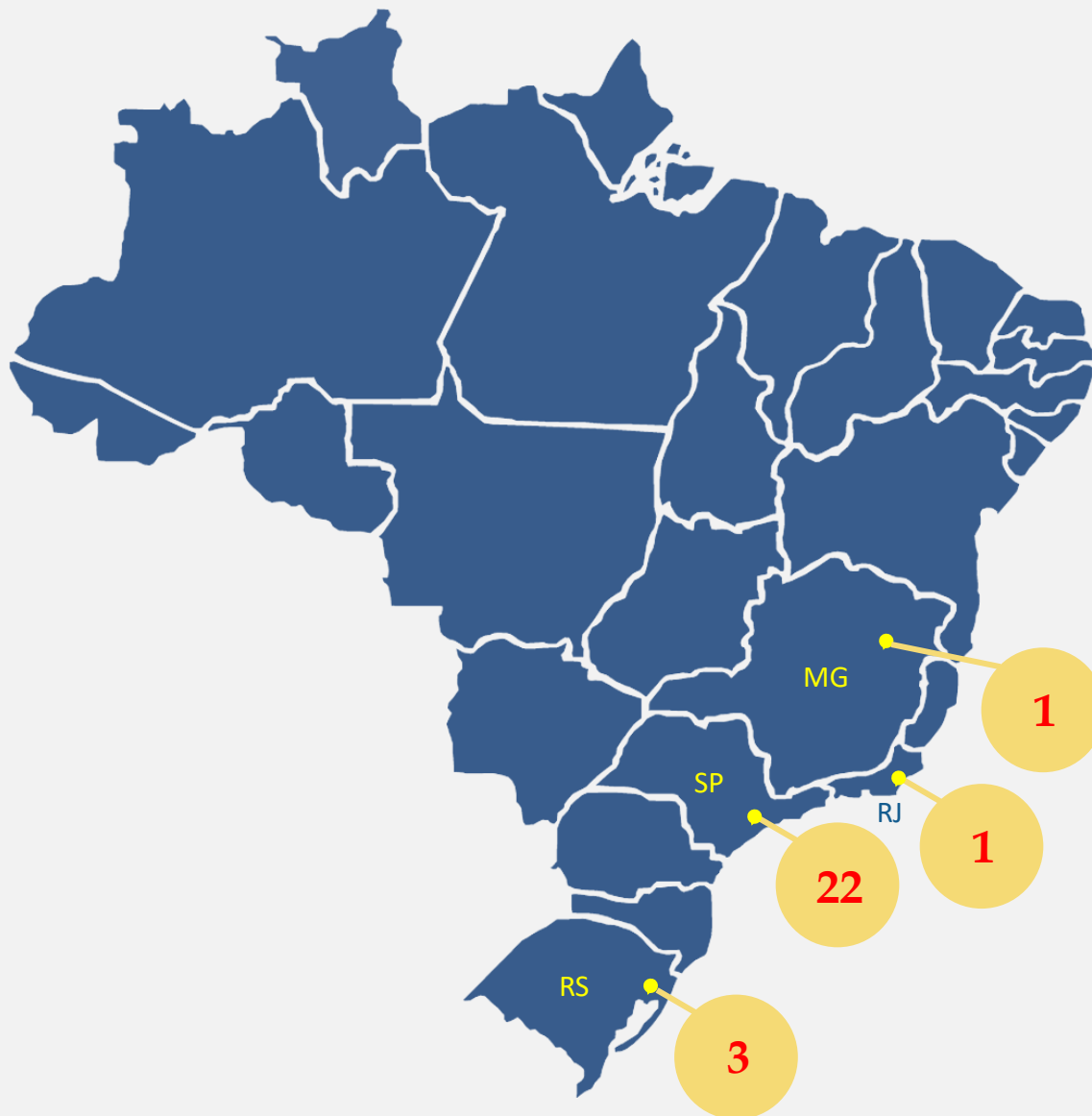


Fabricantes





1966 - 27 marcas

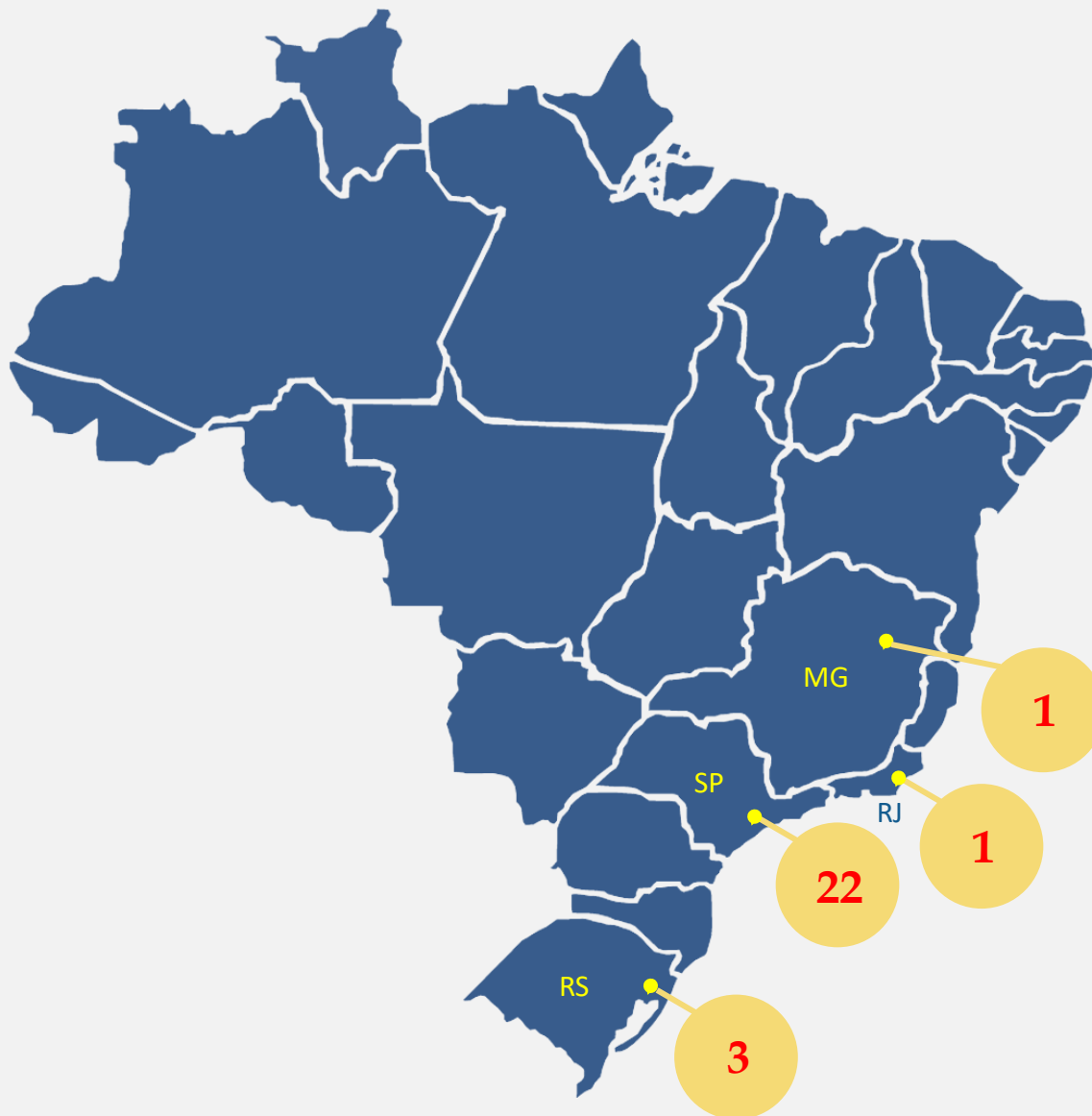


Fabricantes





1967 - 27 marcas

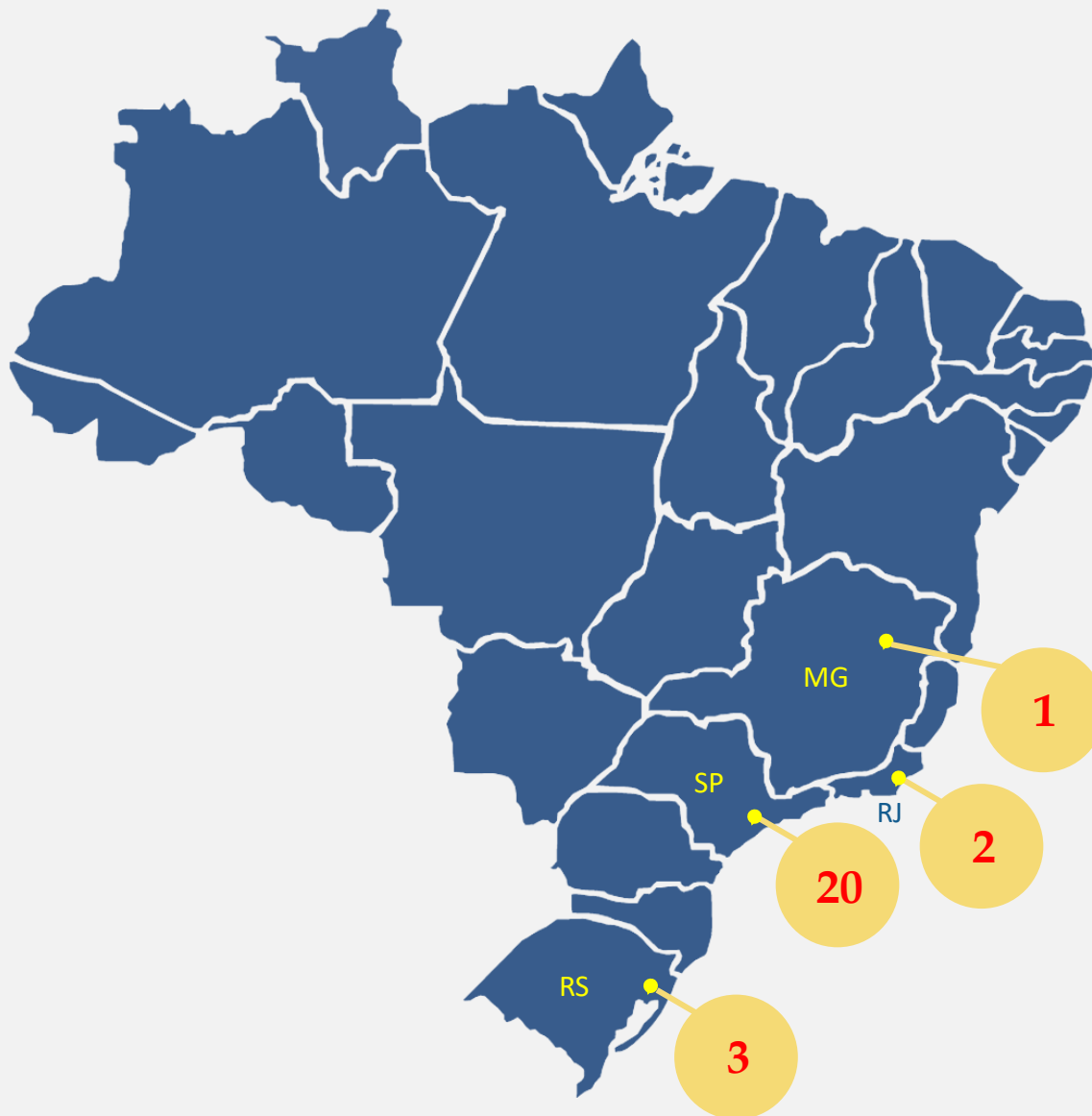


Fabricantes





1968 - 26 marcas

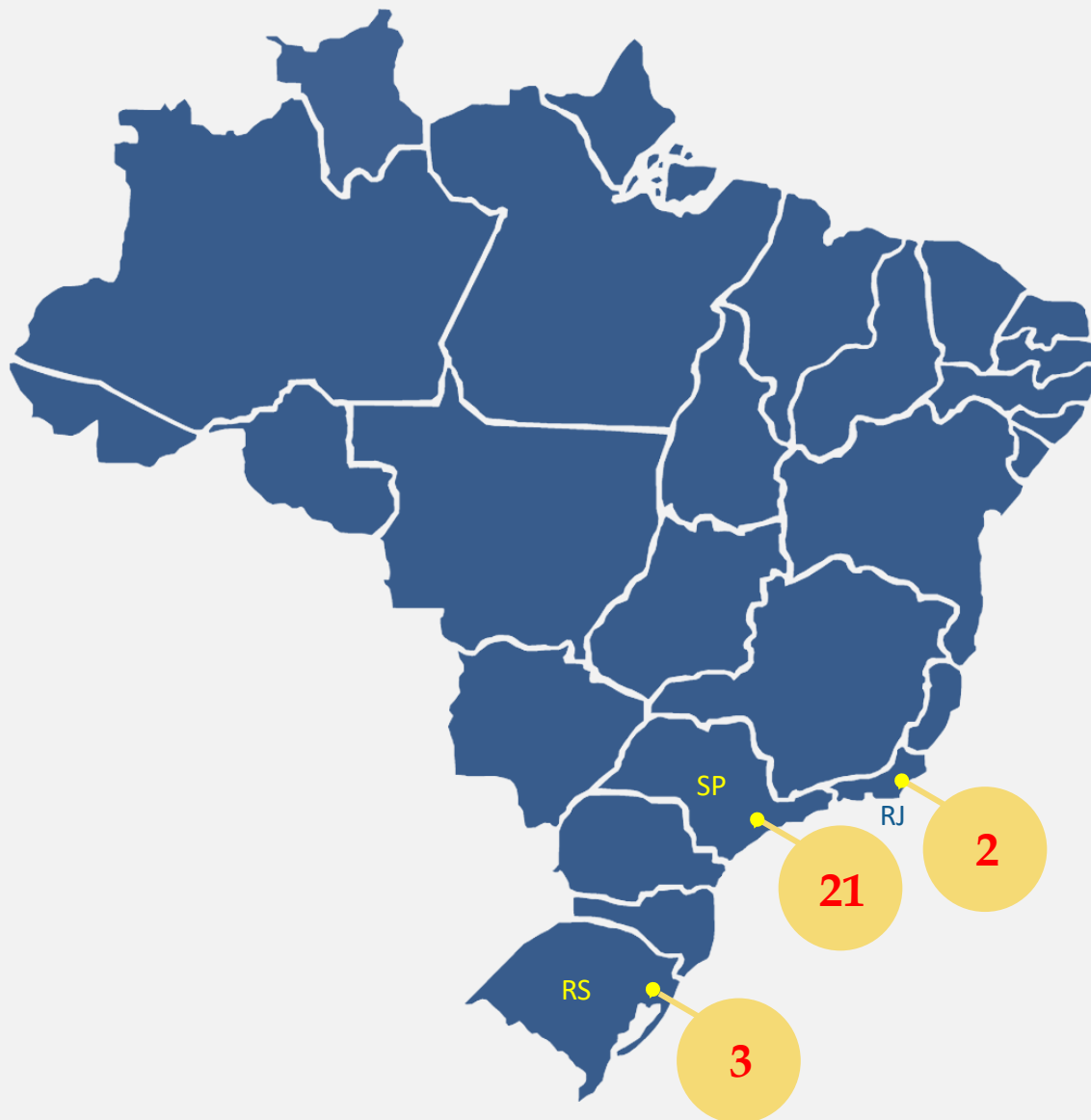


Fabricantes

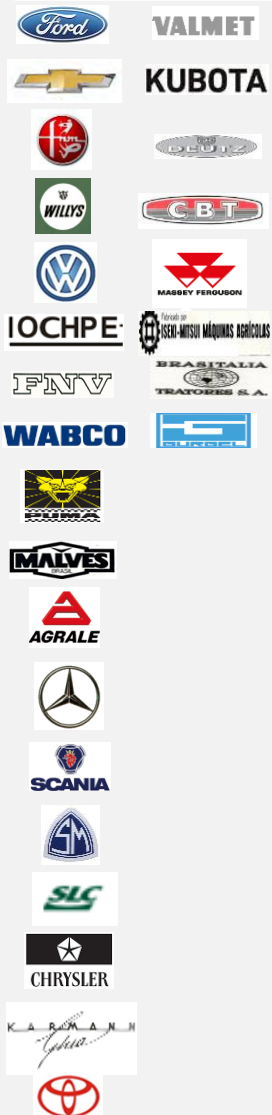




1970 - 26 marcas

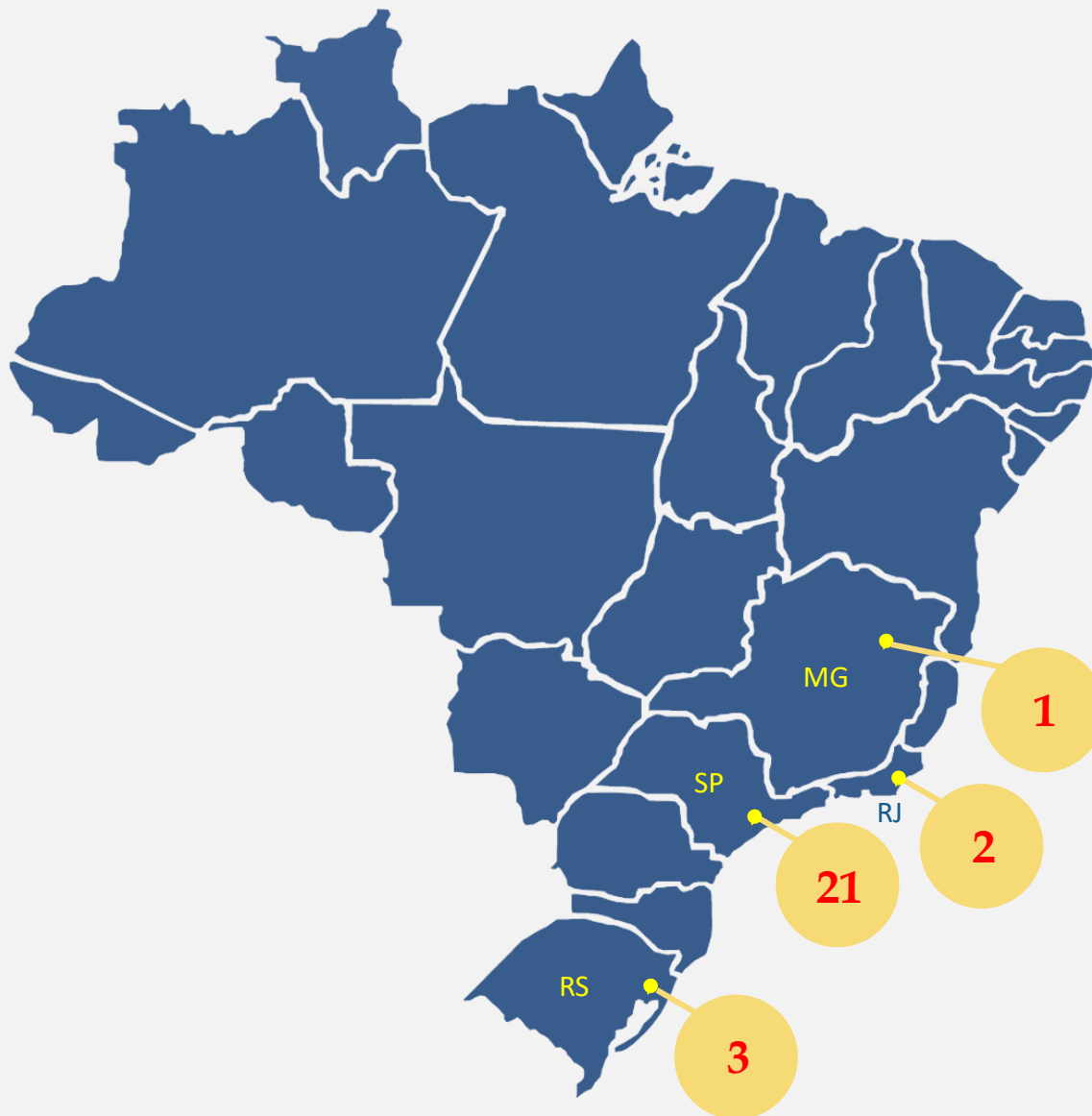


Fabricantes





1971 - 27 marcas

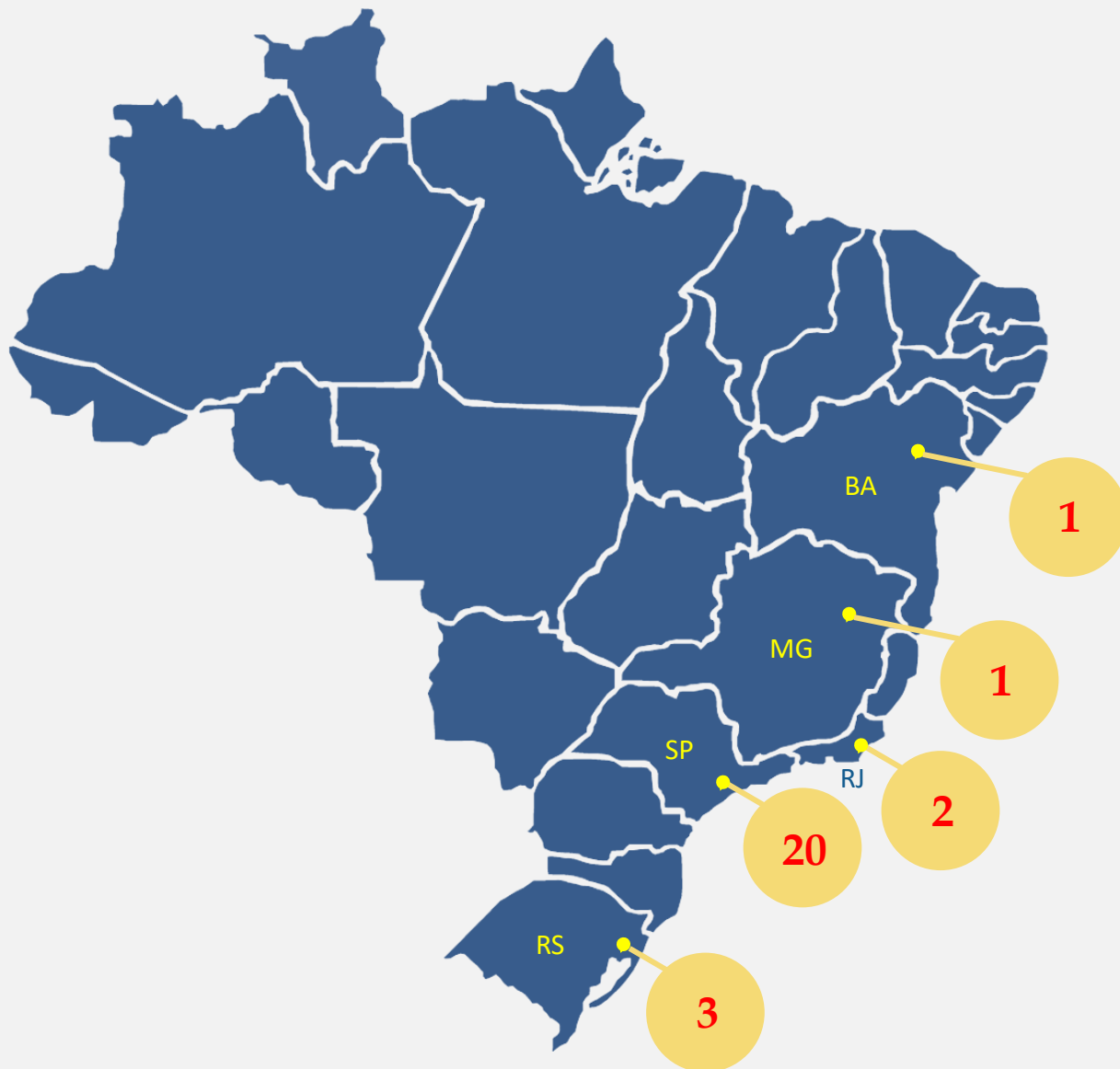


Fabricantes





1972 - 27 marcas

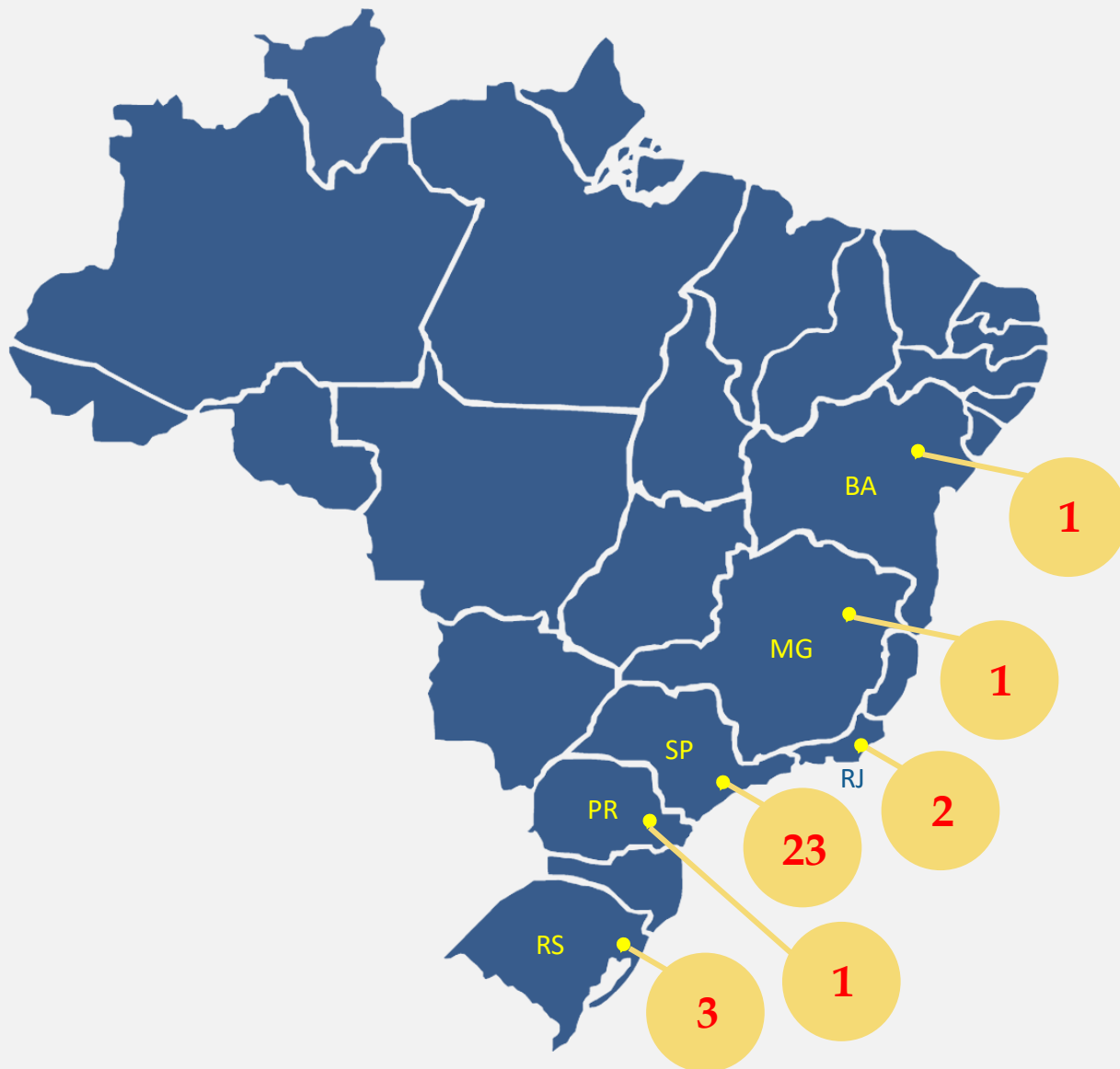


Fabricantes





1975 - 31 marcas

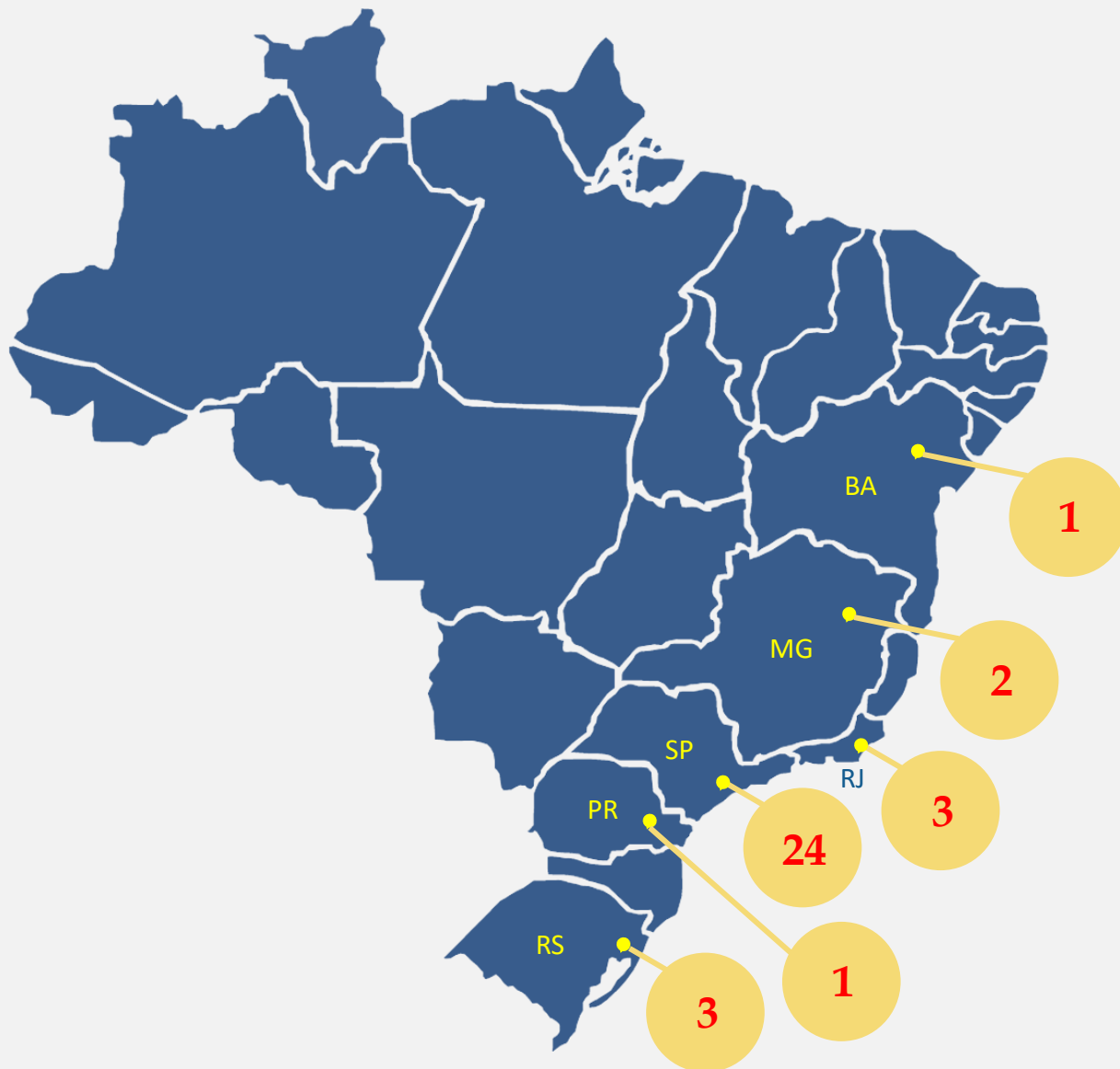


Fabricantes





1976 - 34 marcas

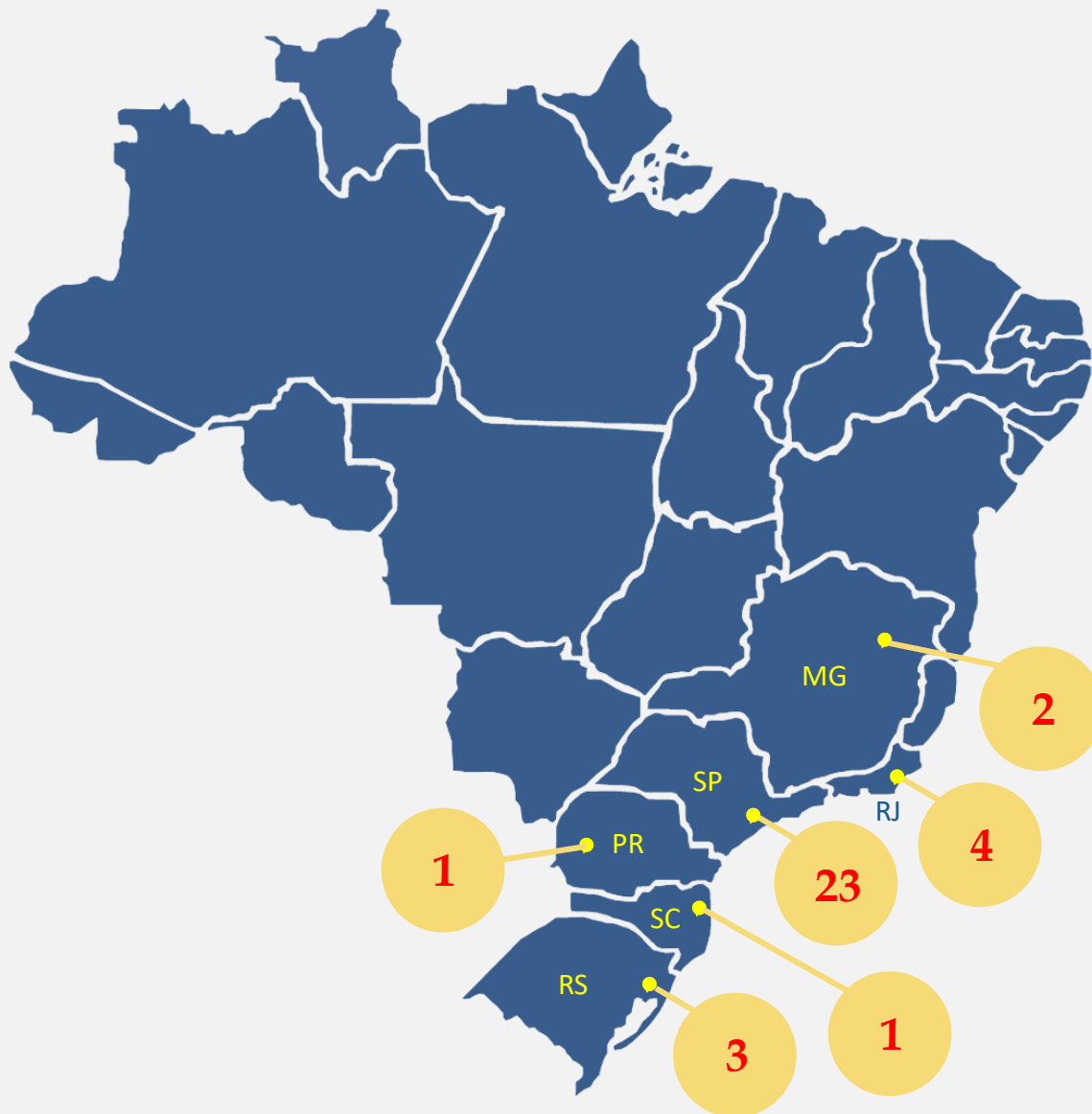


Fabricantes





1977 - 34 marcas

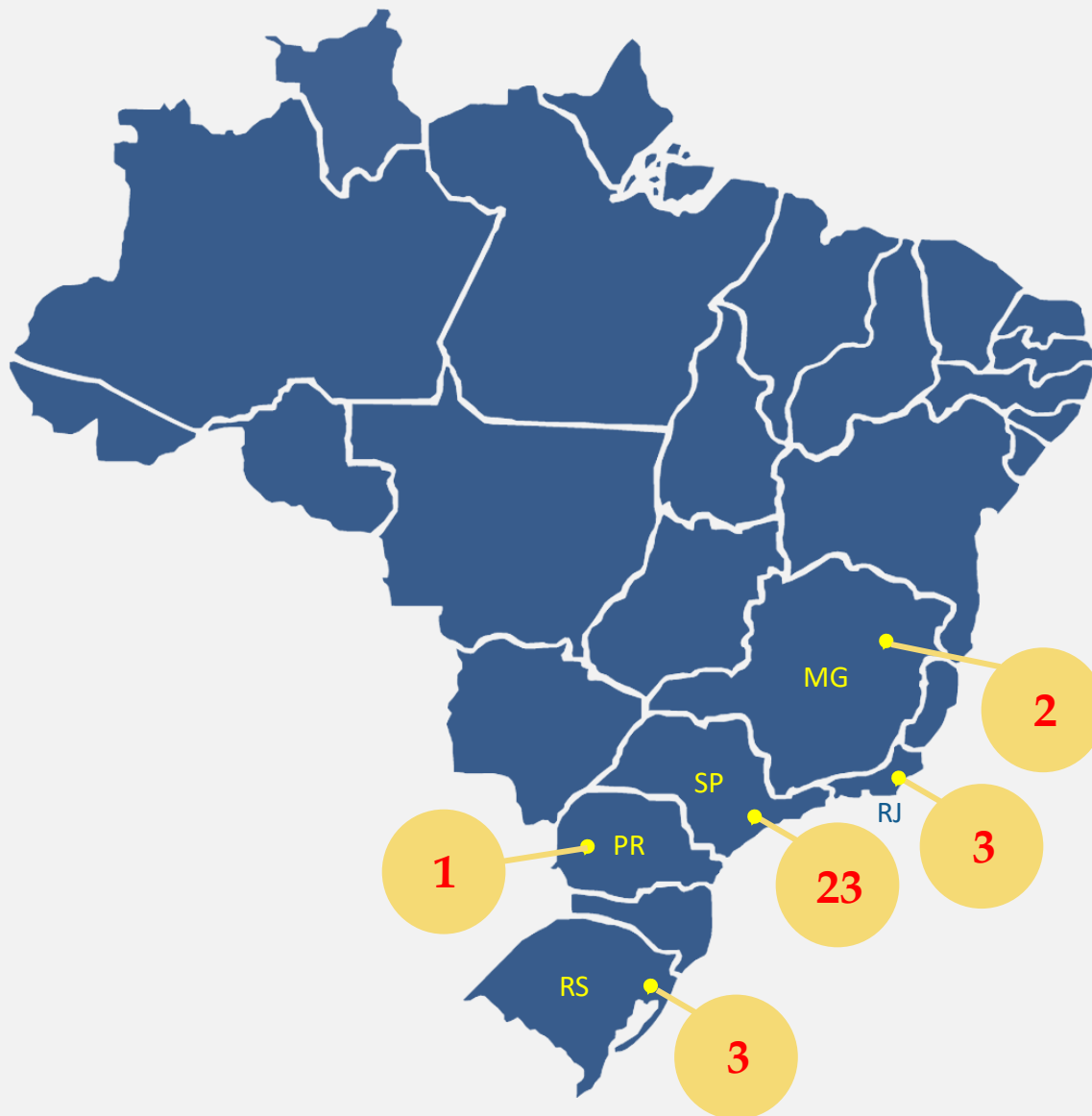


Fabricantes





1978 - 32 marcas

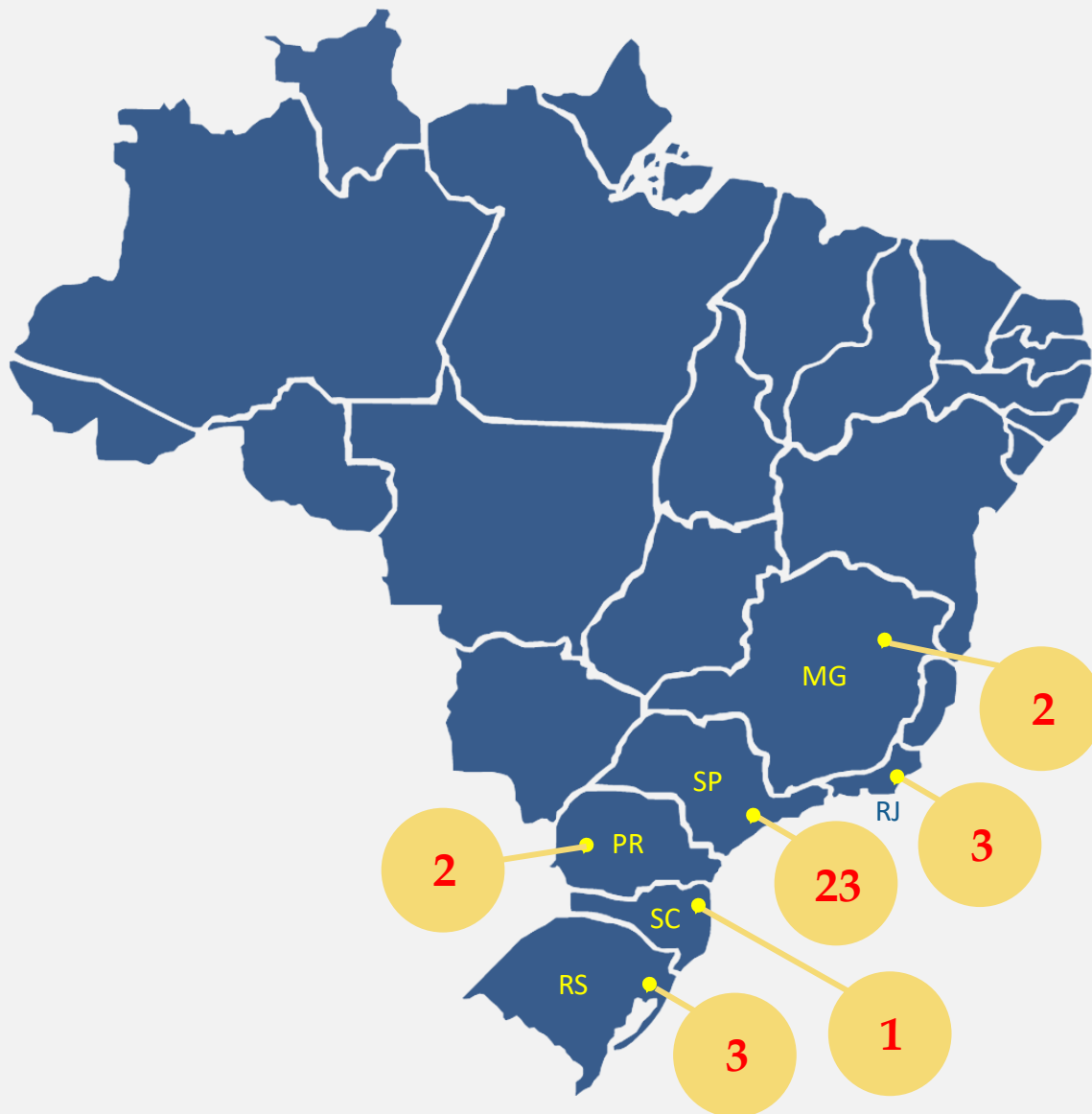


Fabricantes





1979 - 34 marcas

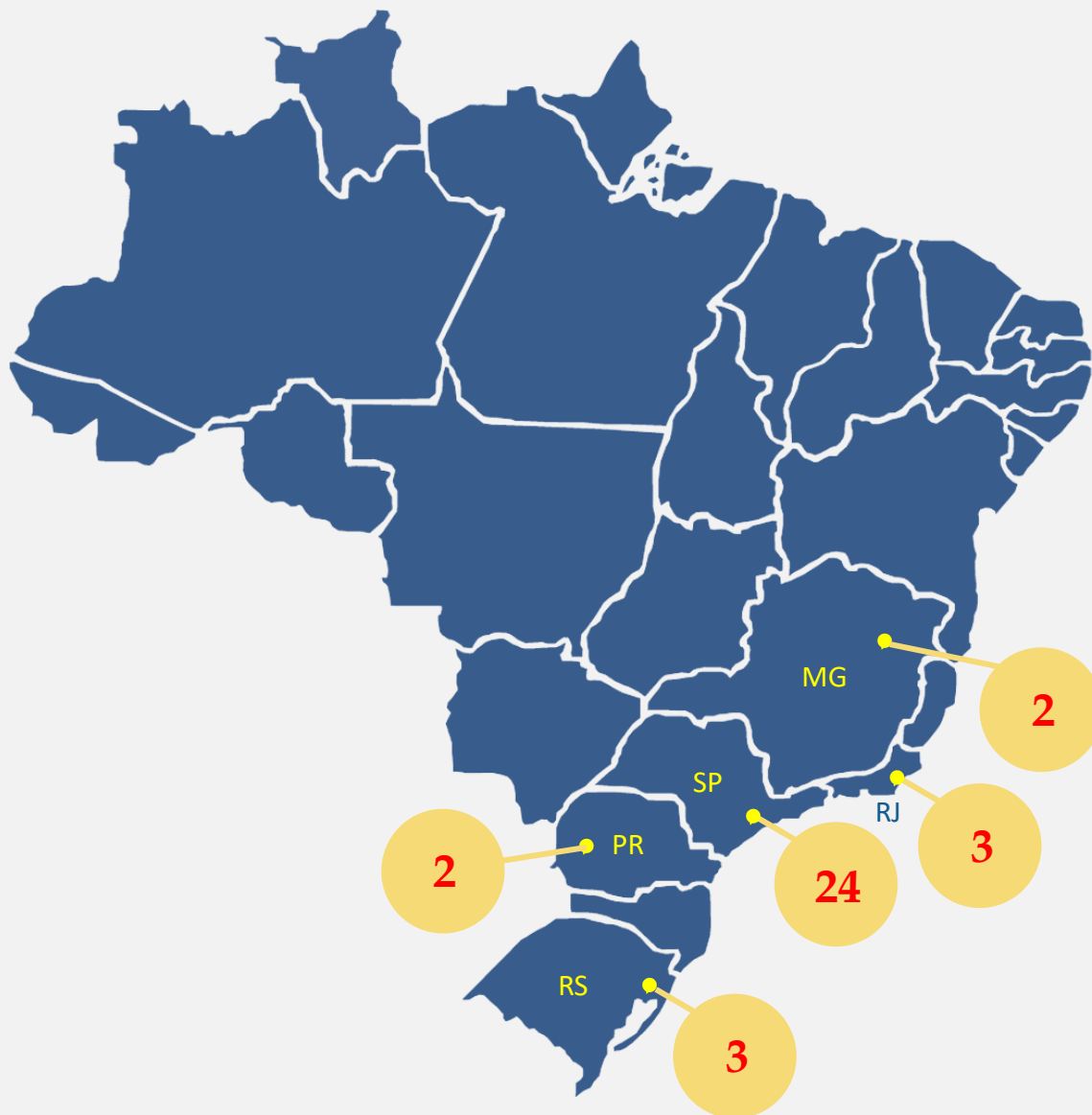


Fabricantes





1980 - 34 marcas

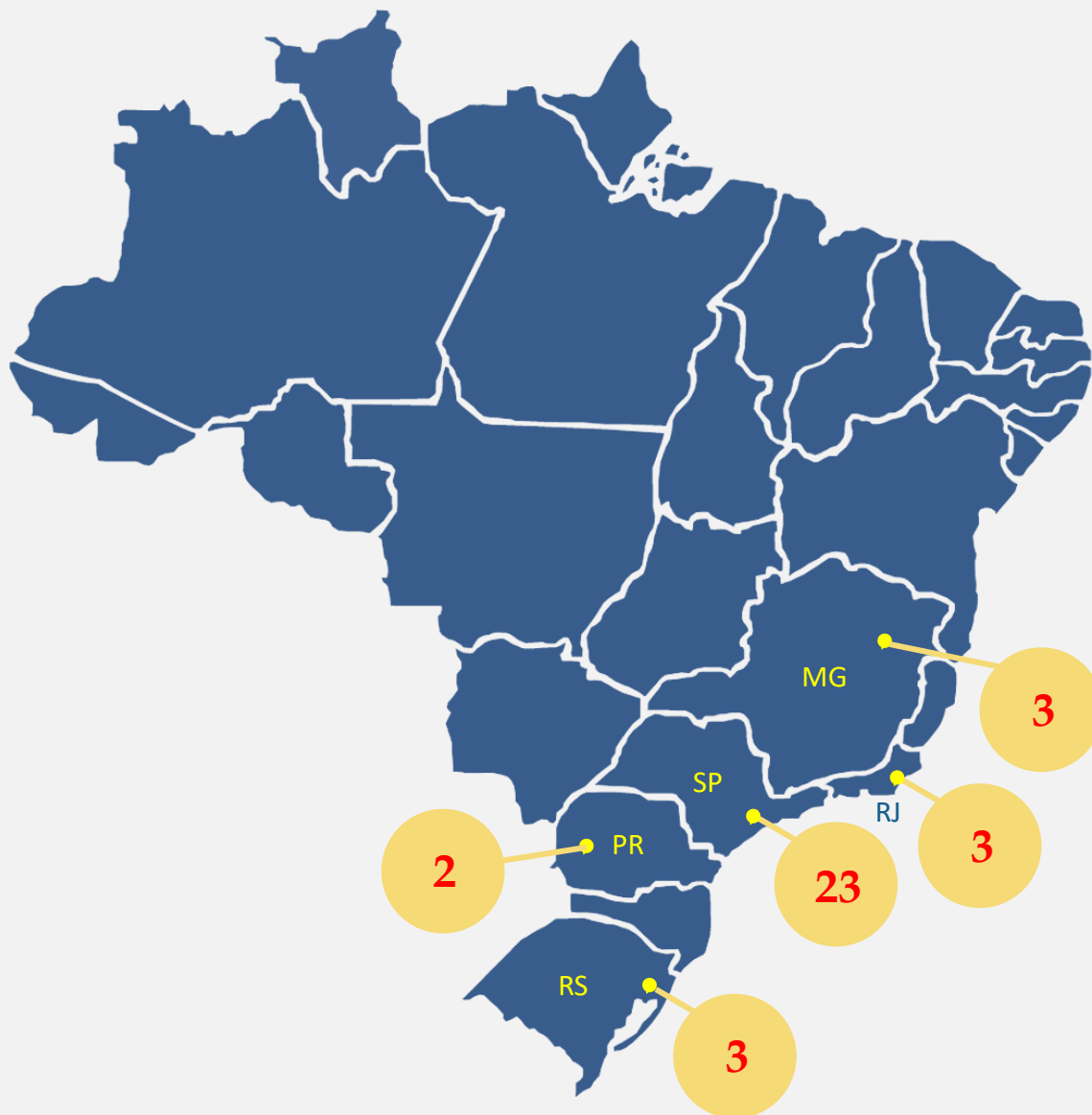


Fabricantes





1981 - 34 marcas

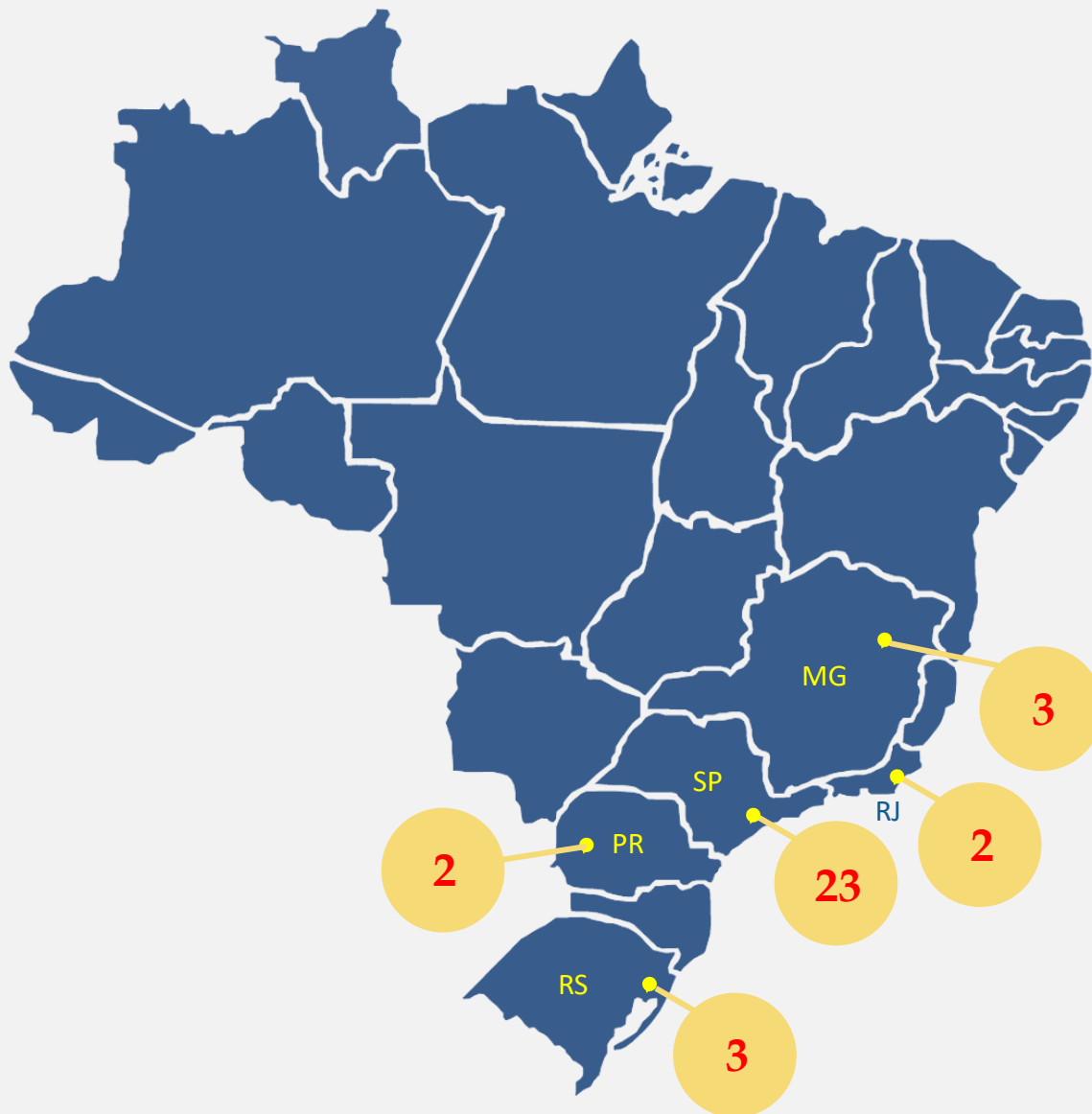


Fabricantes

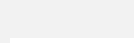
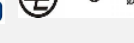




1984 - 33 marcas

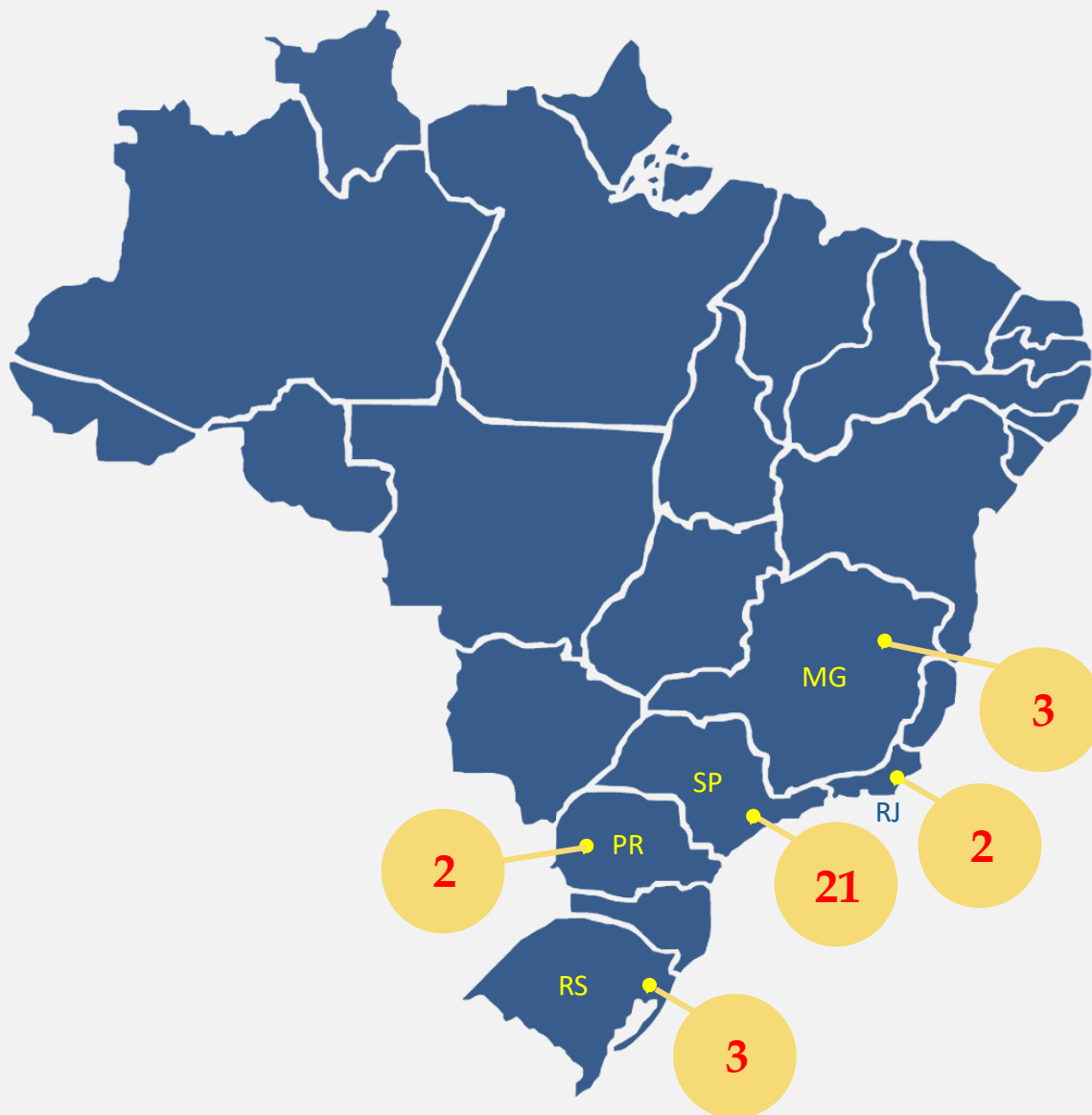


Fabricantes





1985 - 31 marcas

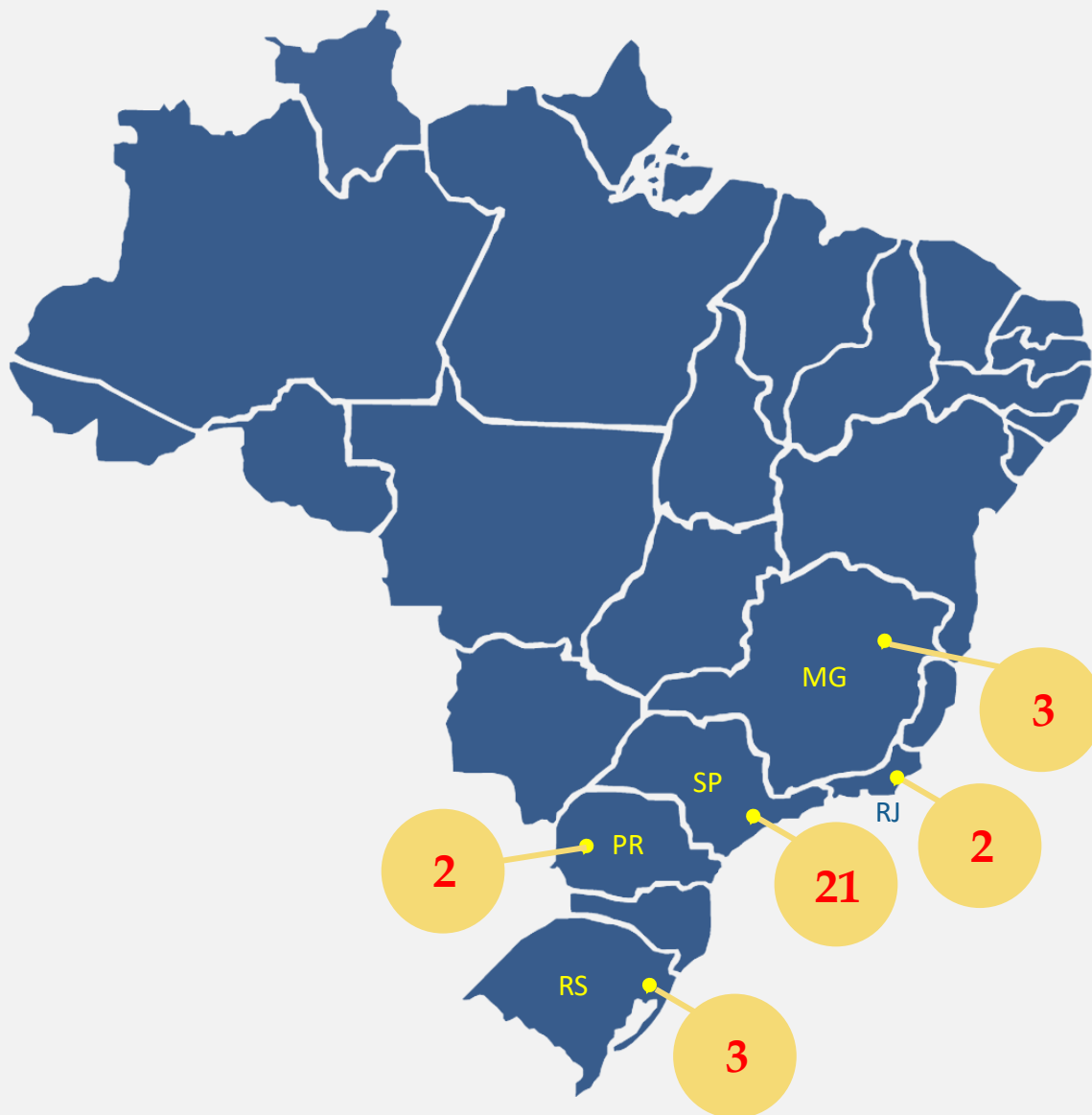


Fabricantes





1989 - 31 marcas

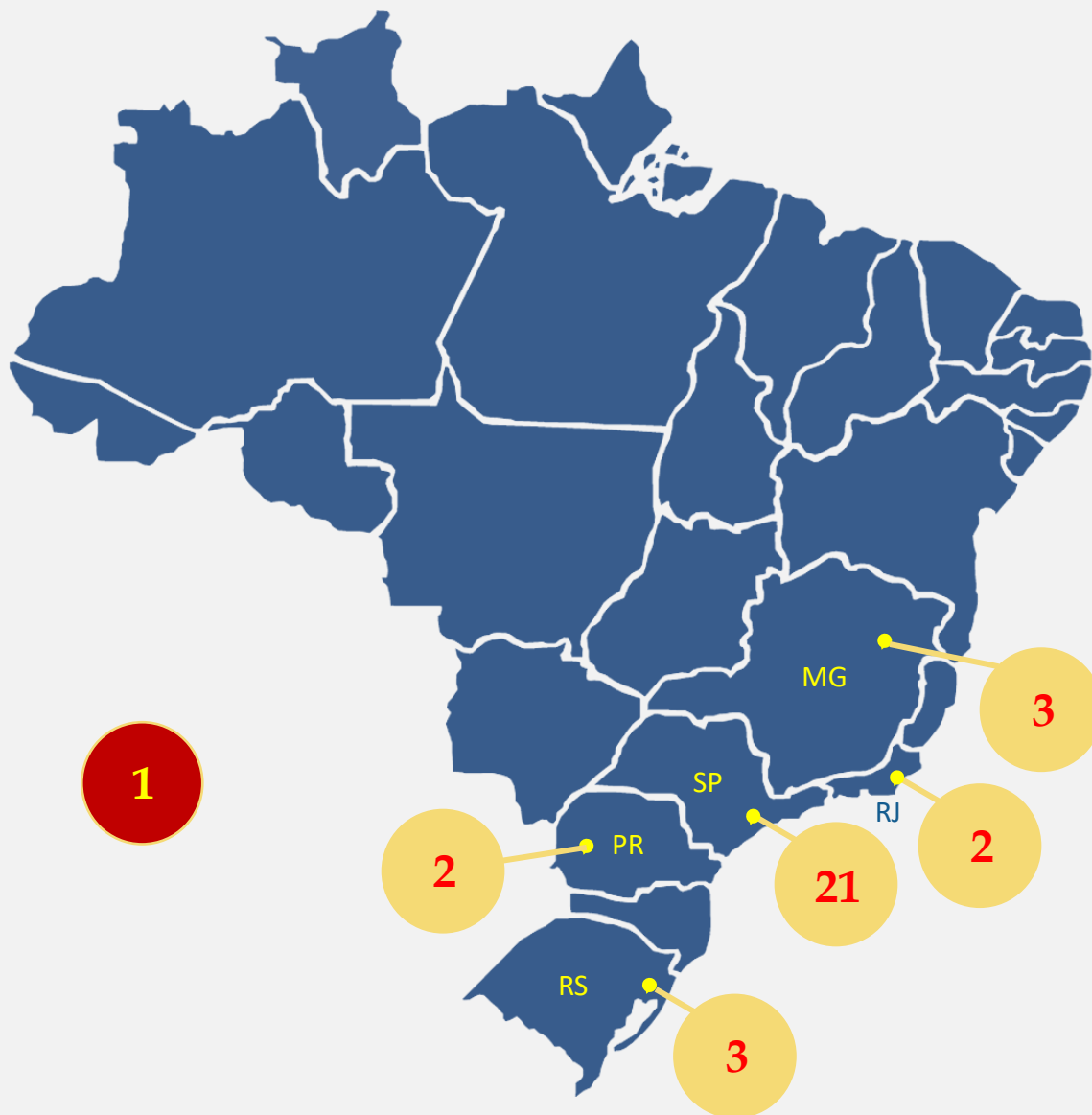


Fabricantes





1990 - 32 marcas



Fabricantes

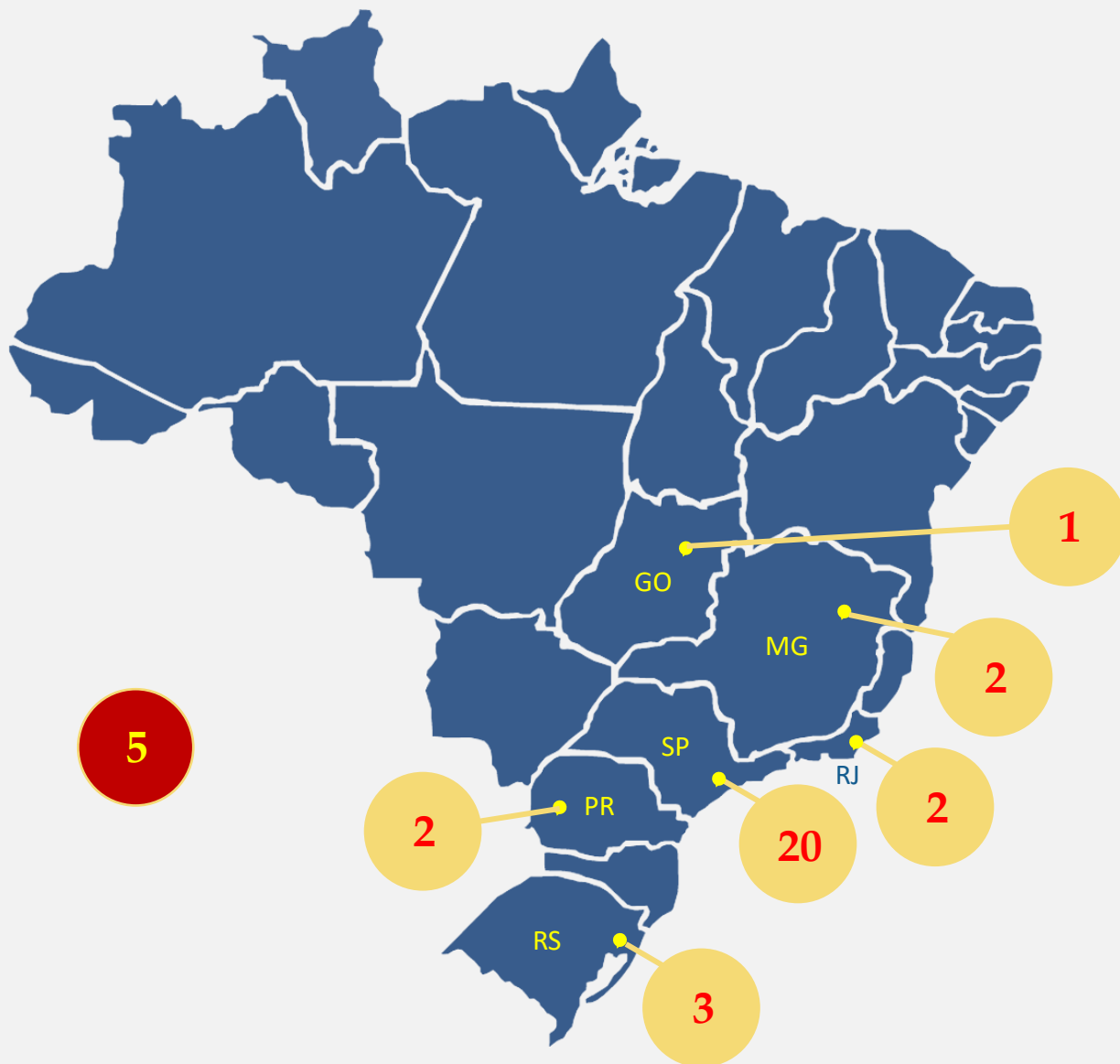


Importadores





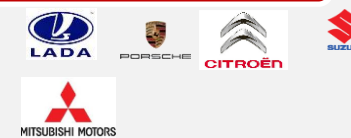
1991 - 35 marcas



Fabricantes

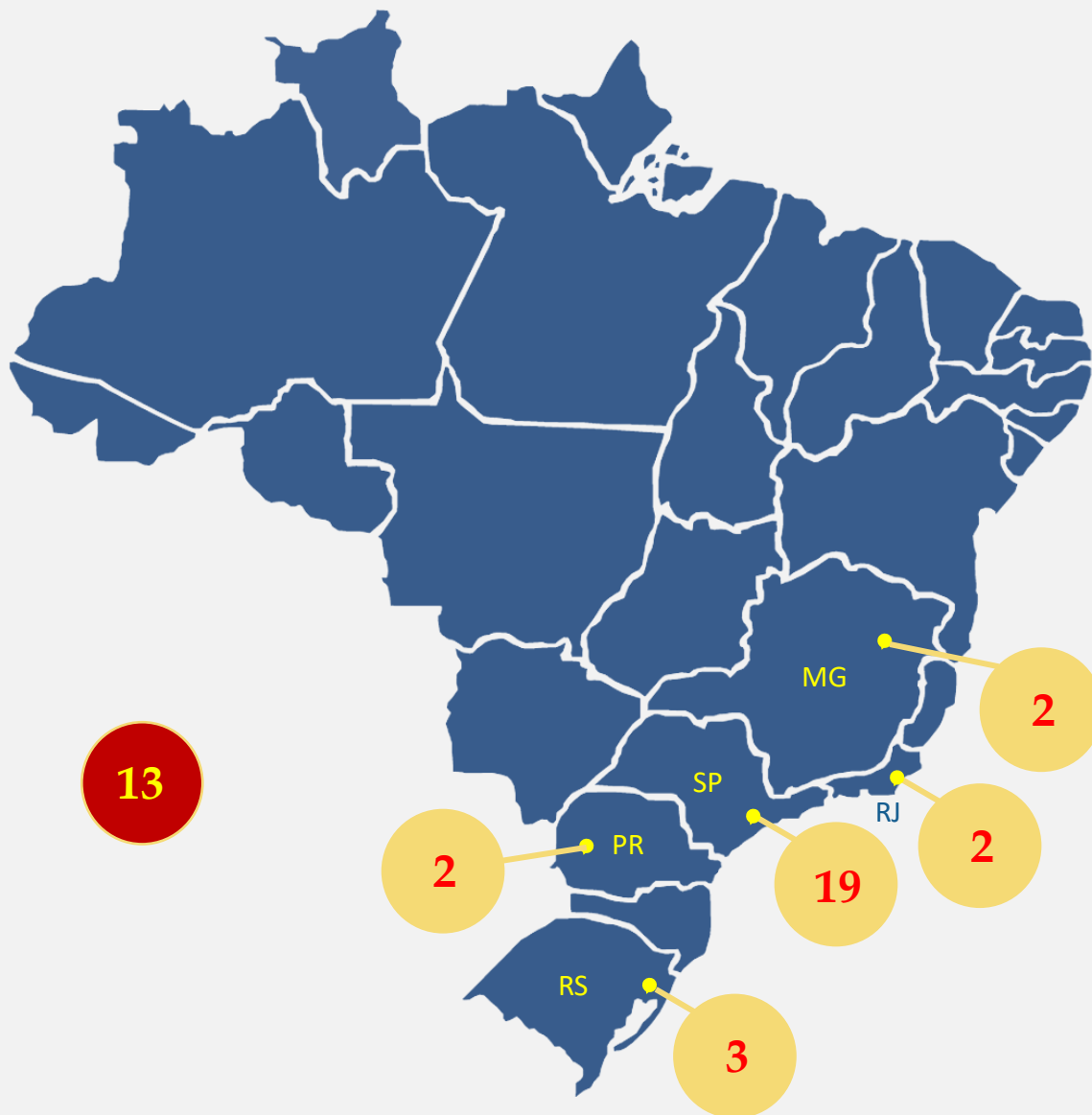


Importadores





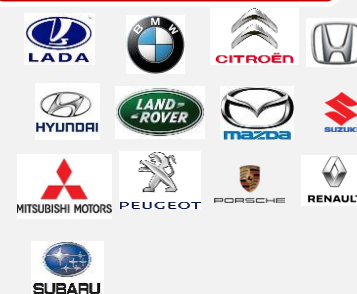
1992 - 41 marcas



Fabricantes

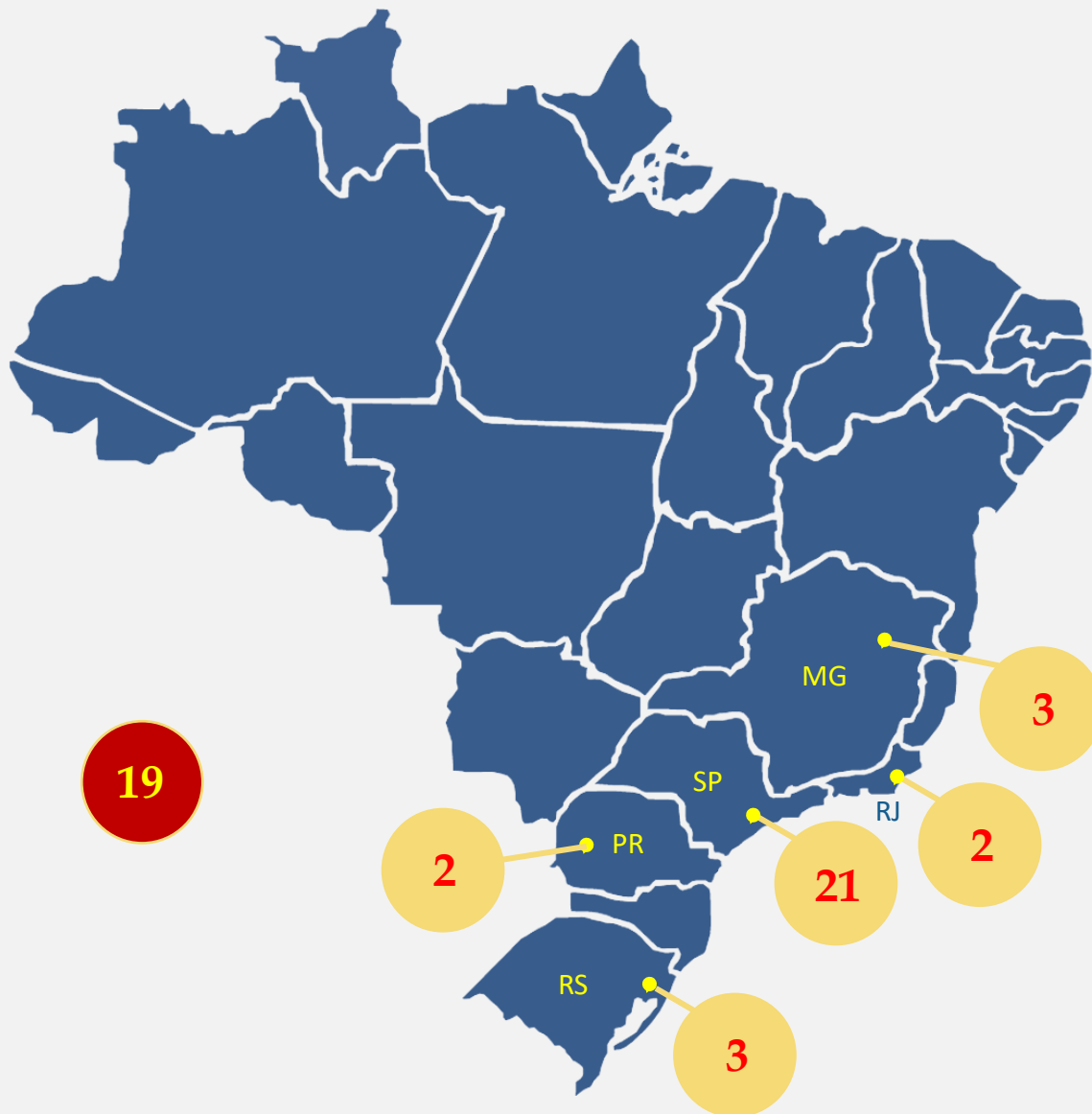


Importadores





1993 - 50 marcas



Fabricantes

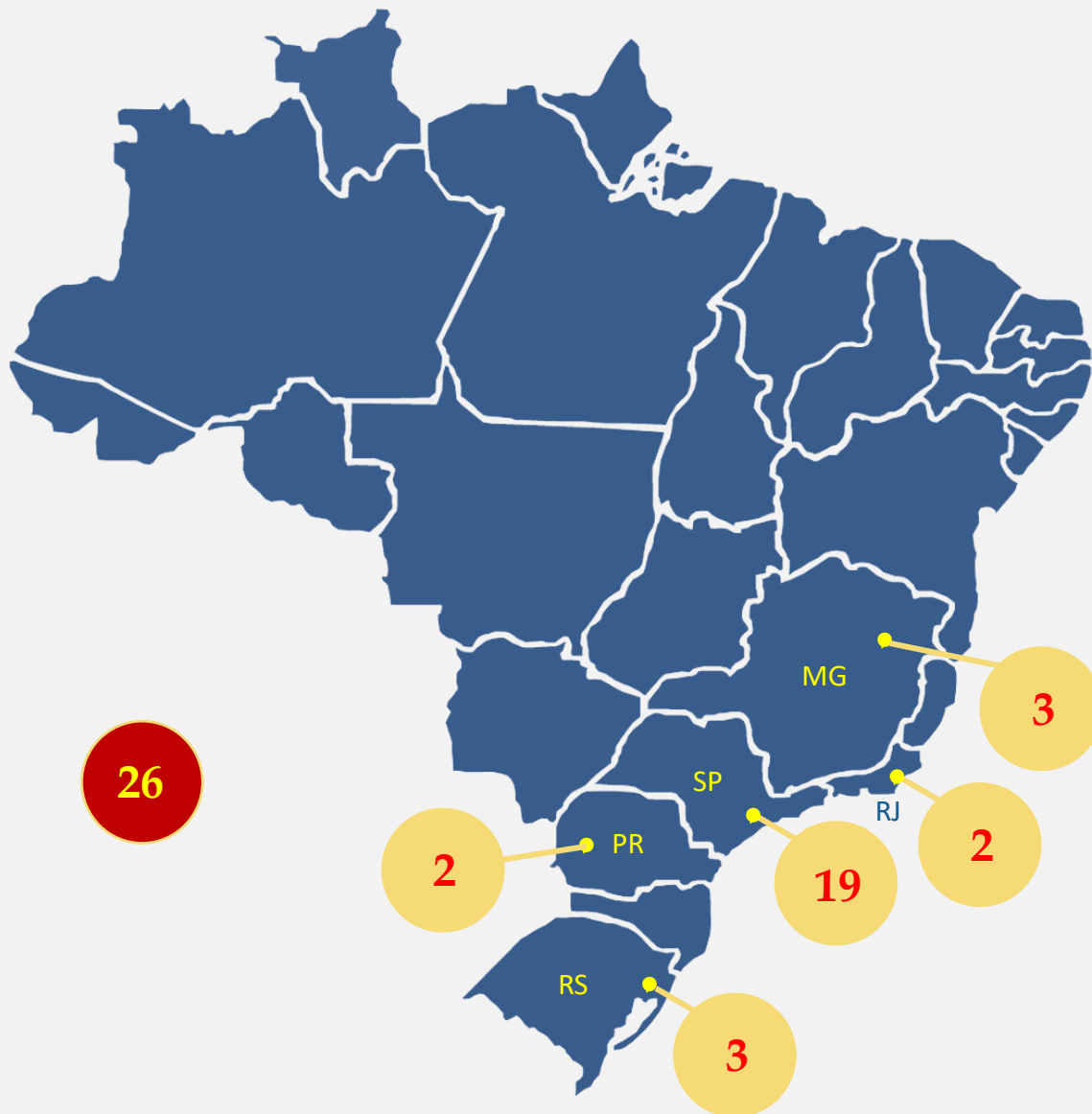


Importadores





1994 - 55 marcas



Fabricantes

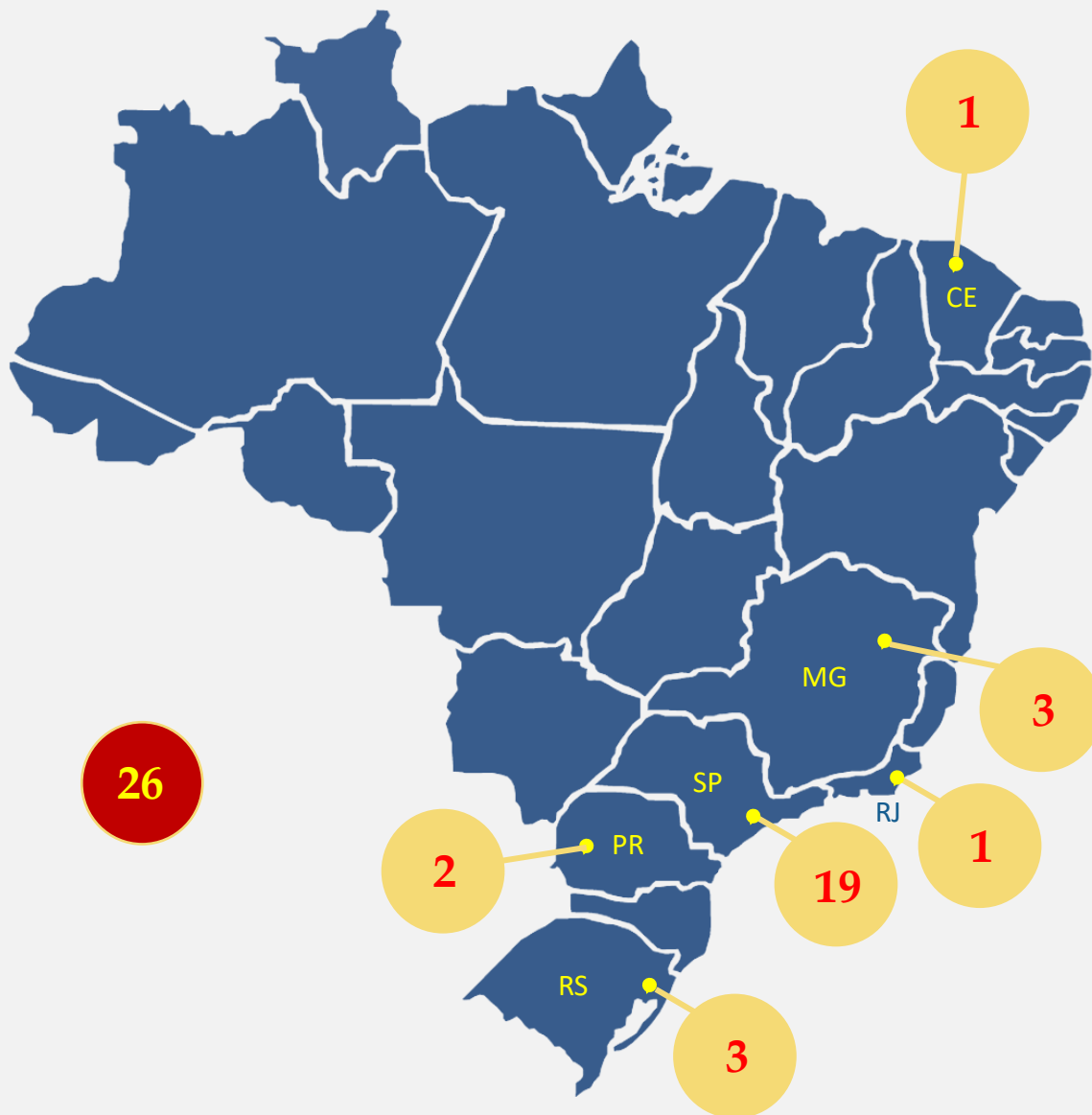


Importadores





1995 - 55 marcas



Fabricantes

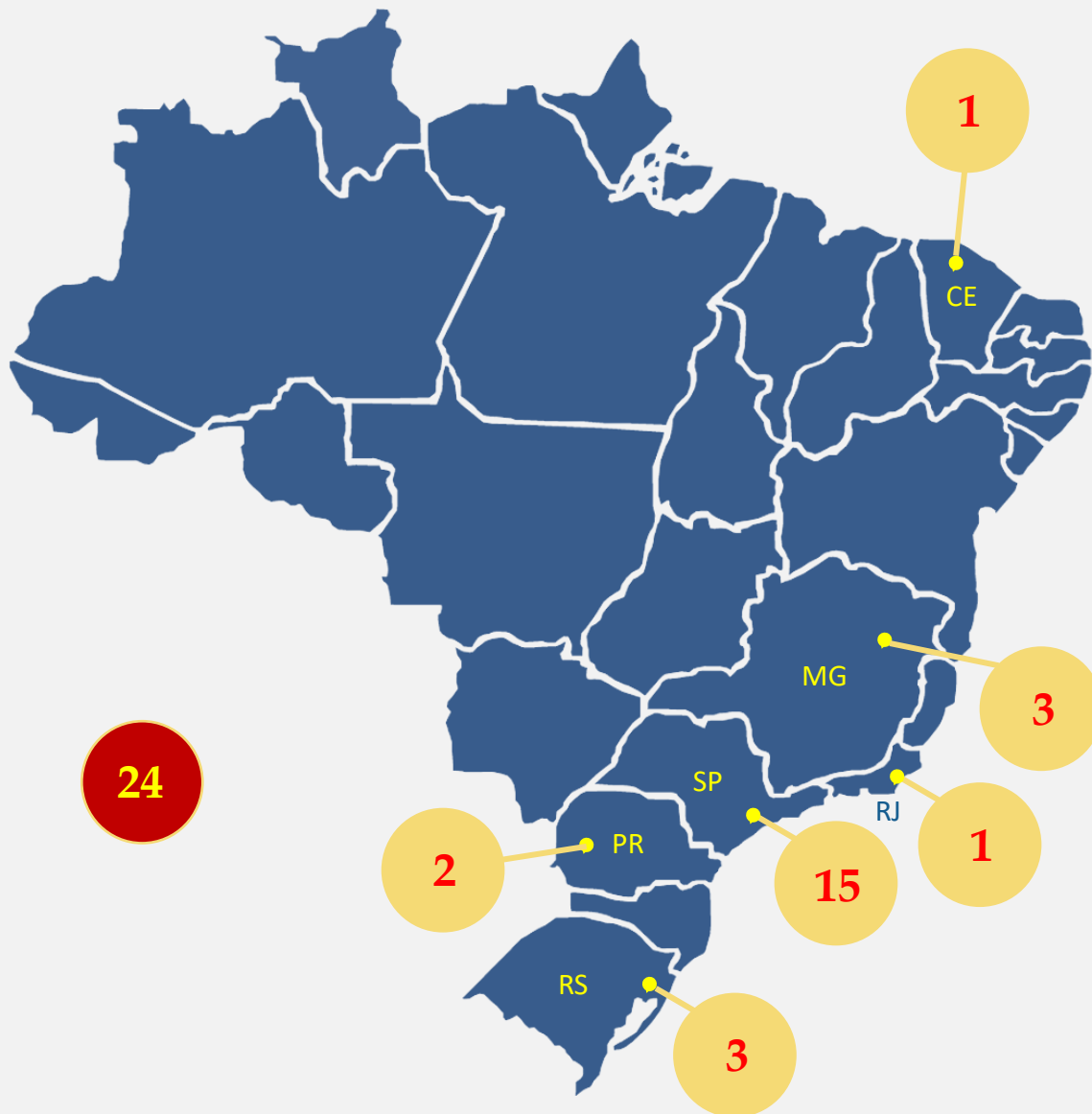


Importadores





1996 - 49 marcas



Fabricantes

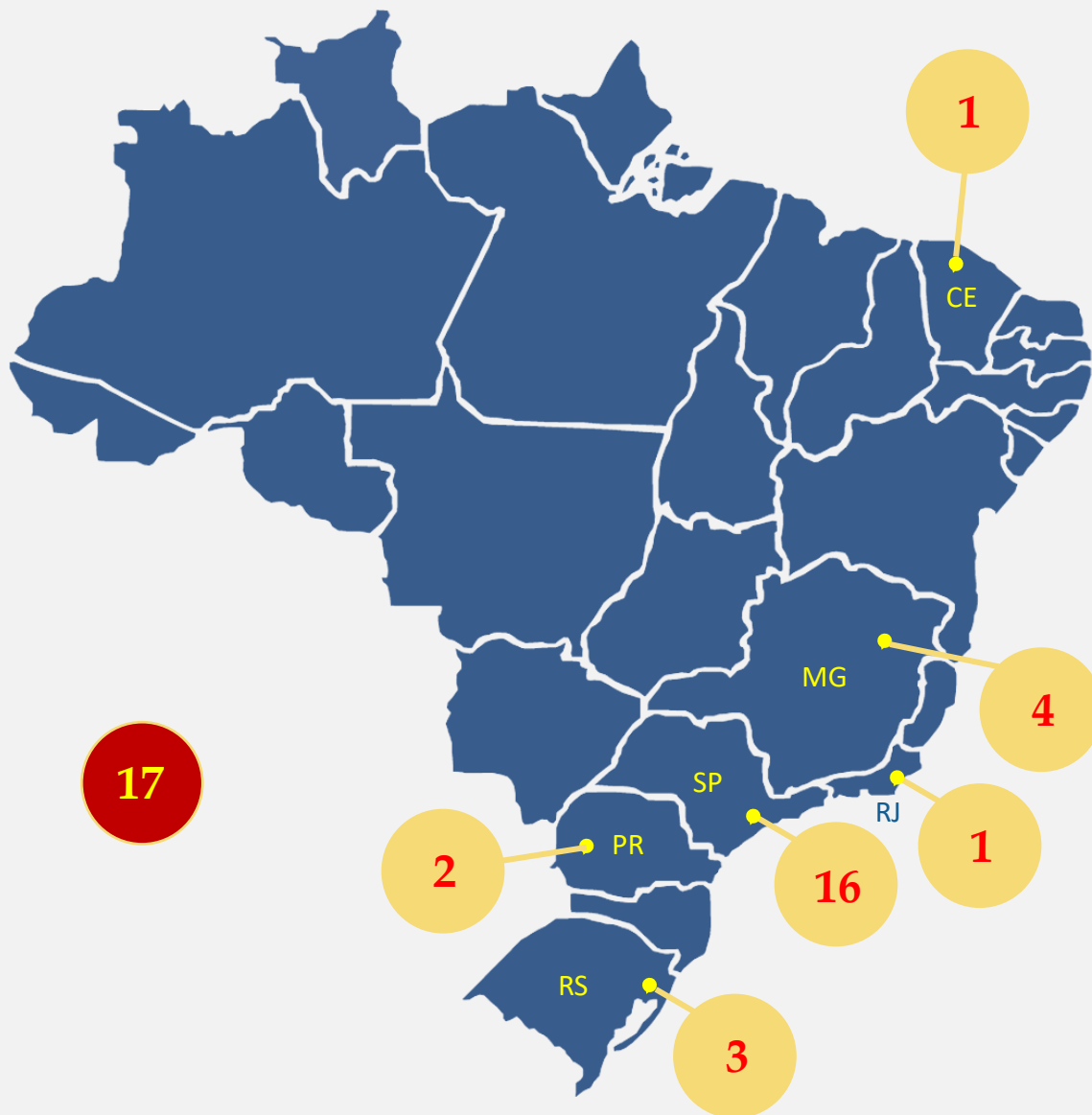


Importadores





1997 - 44 marcas



Fabricantes

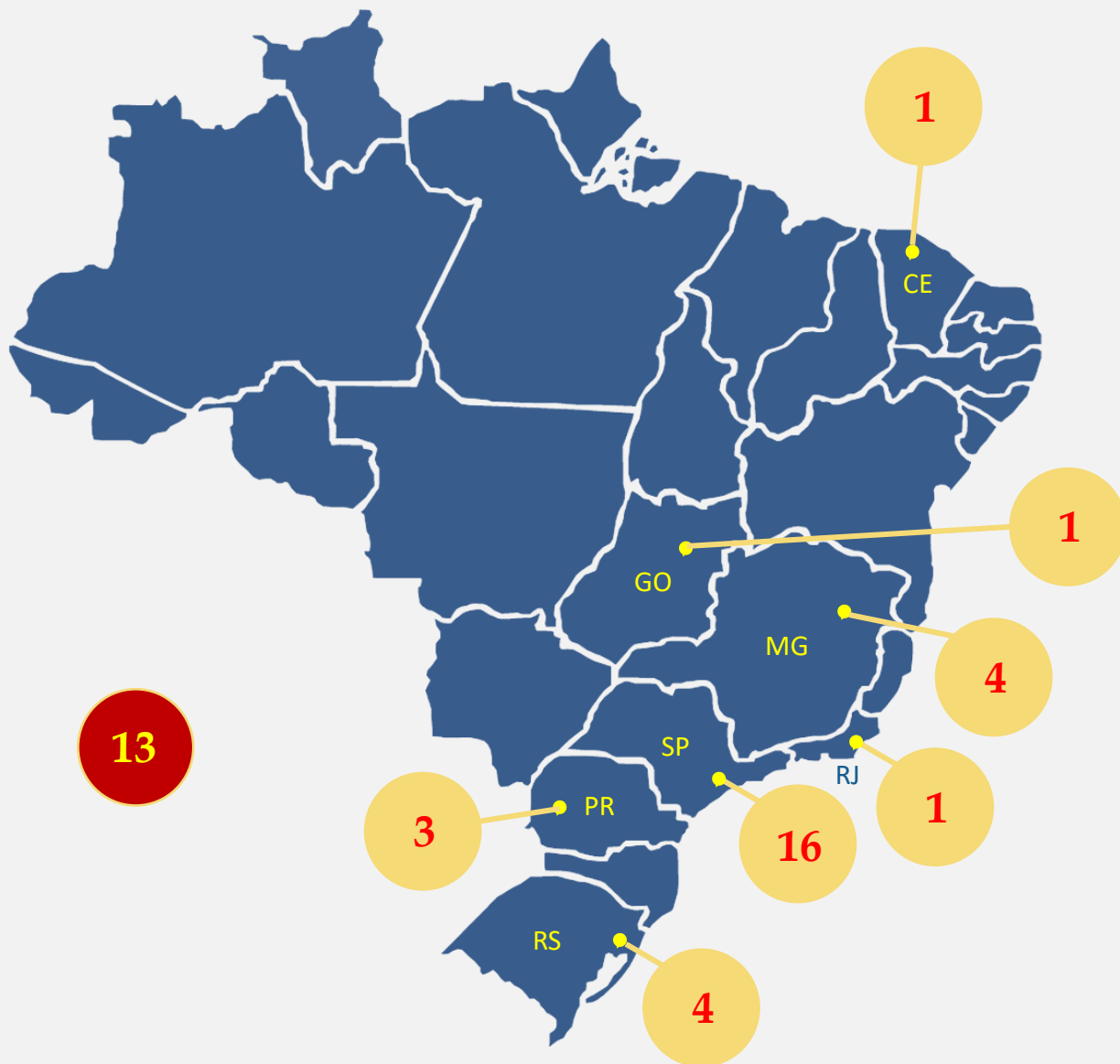


Importadores





1998 - 43 marcas



Fabricantes

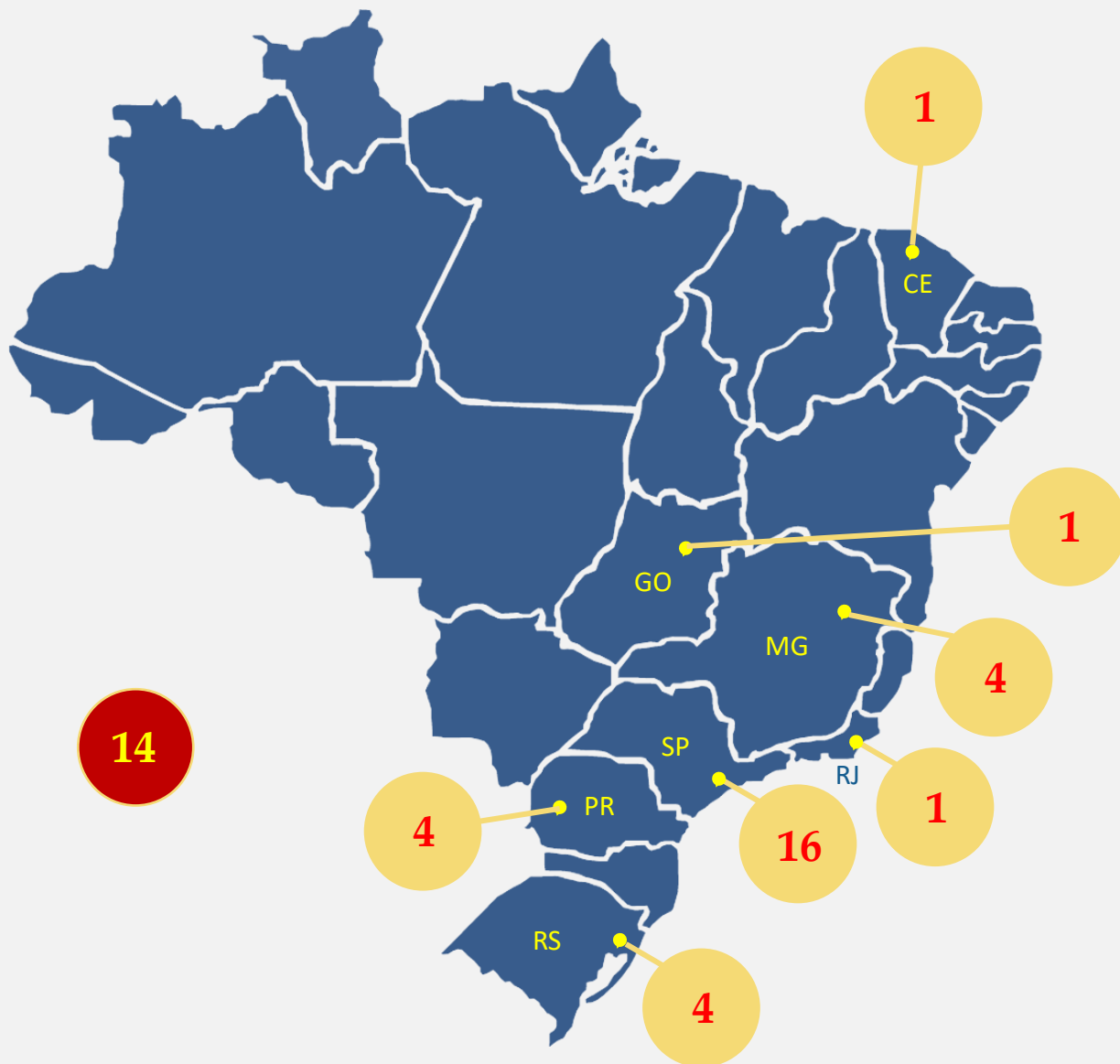


Importadores





1999 - 45 marcas



Fabricantes

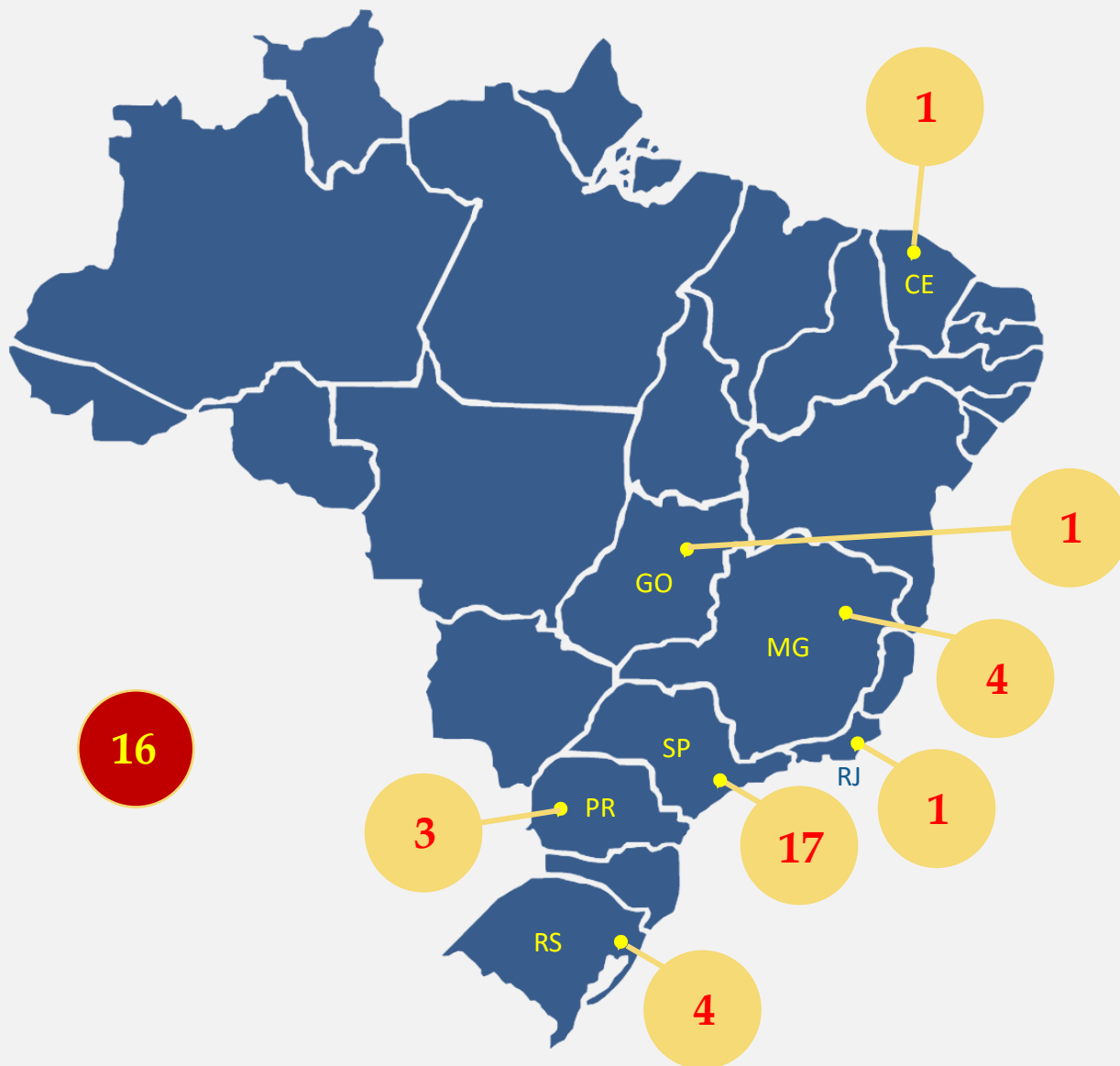


Importadores





2000 - 47 marcas



Fabricantes

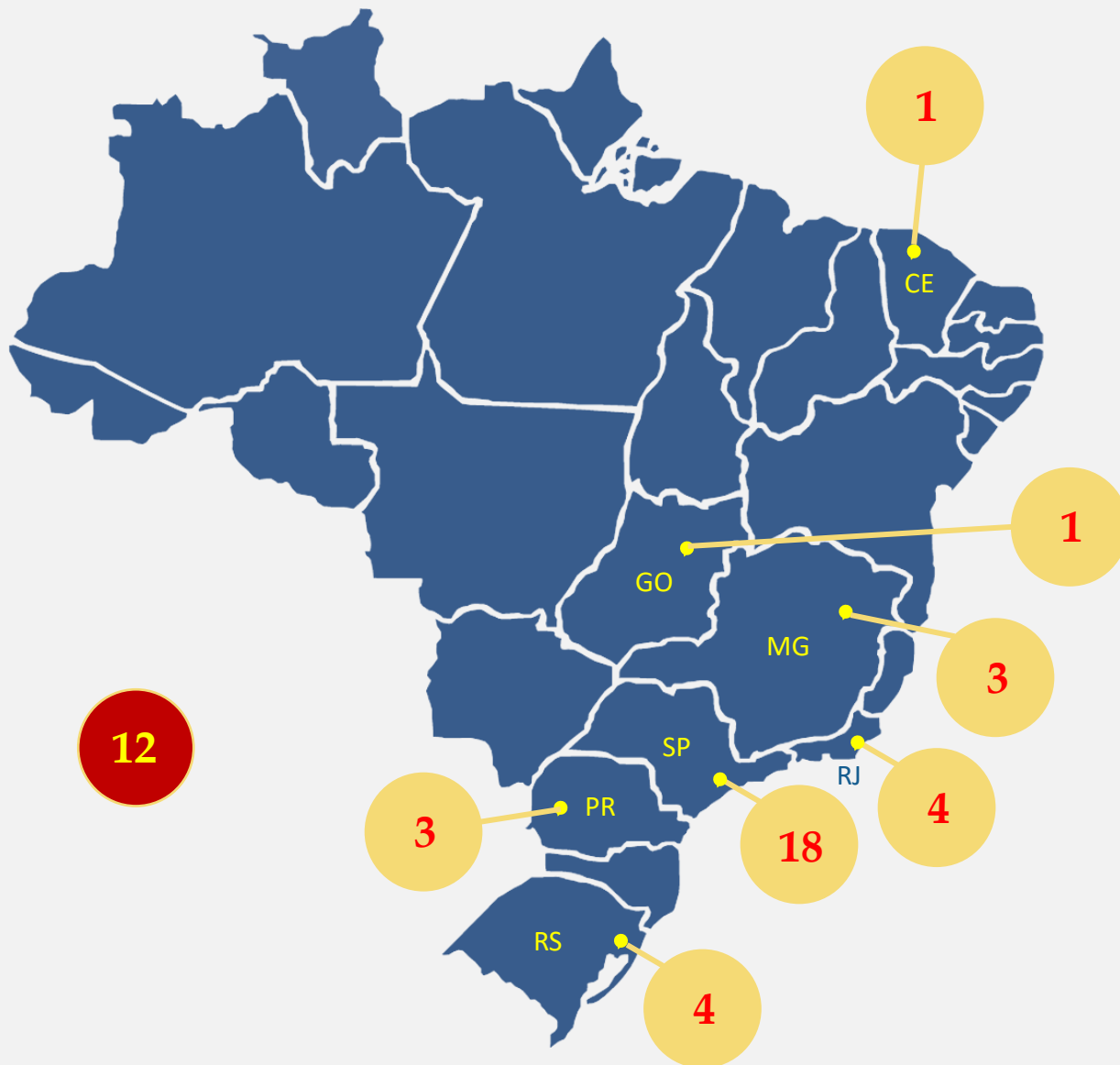


Importadores





2001 - 46 marcas



Fabricantes

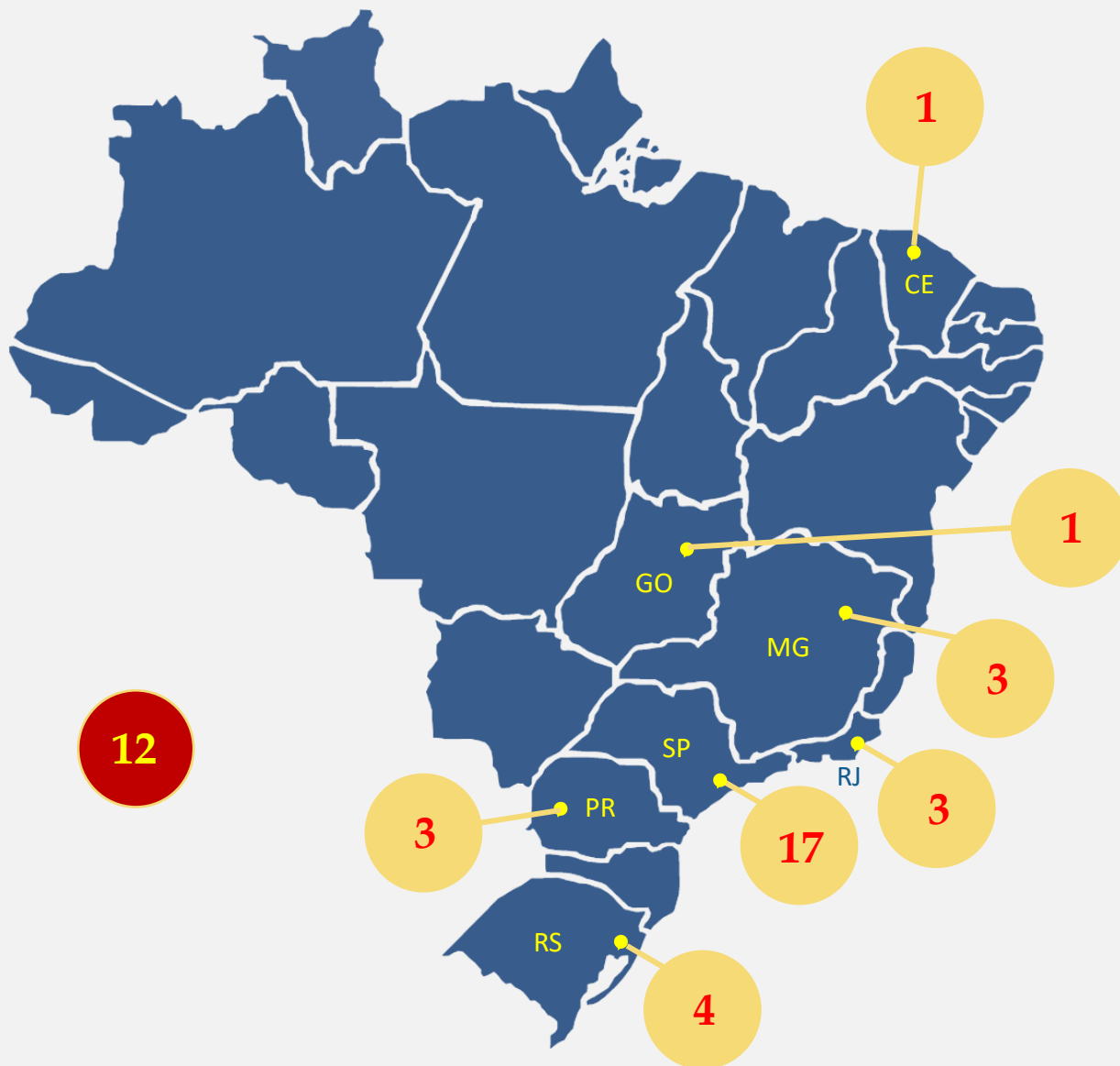


Importadores





2002 - 44 marcas



Fabricantes

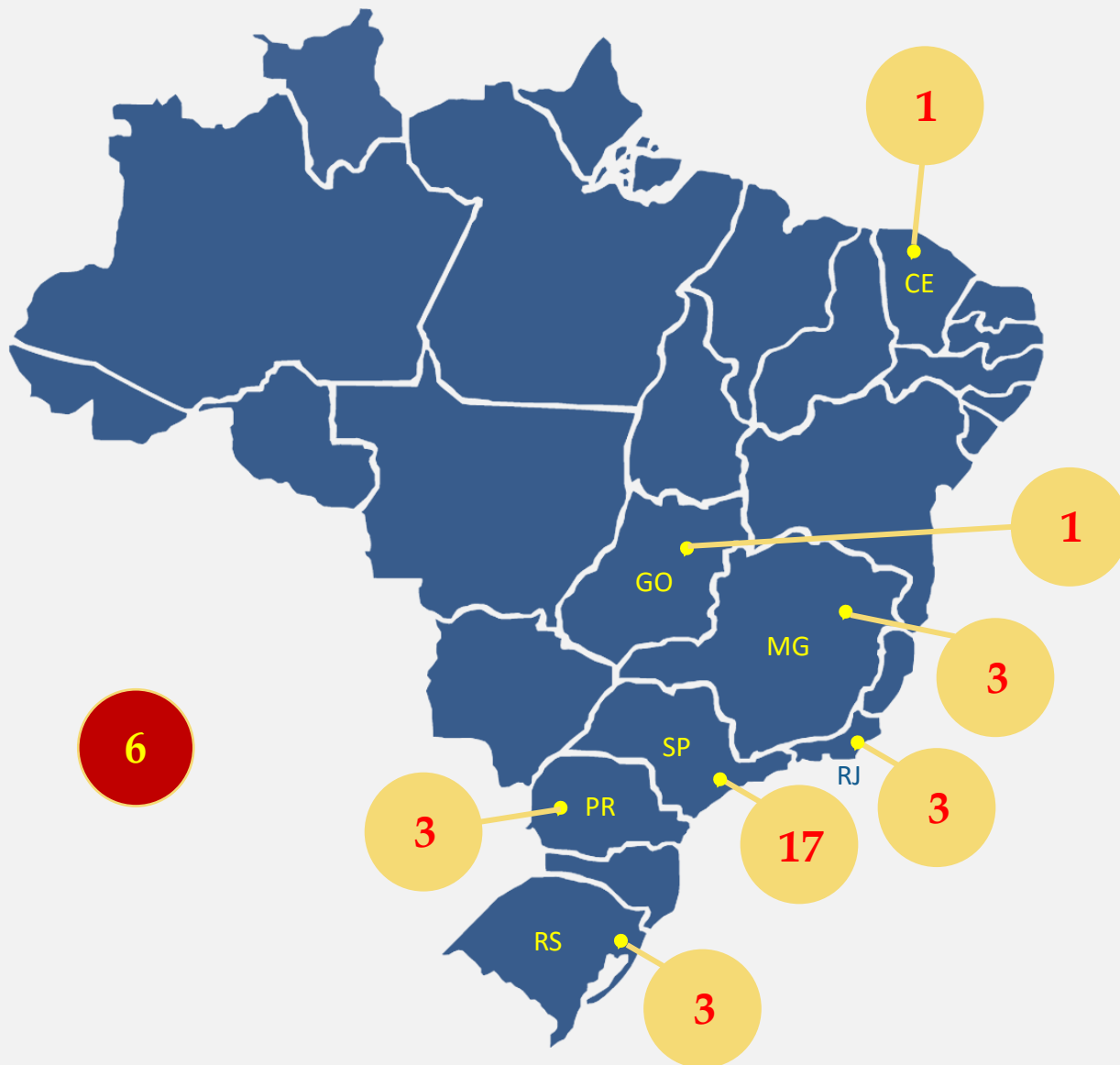


Importadores





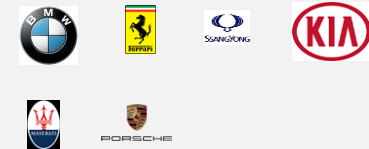
2005 - 37 marcas



Fabricantes

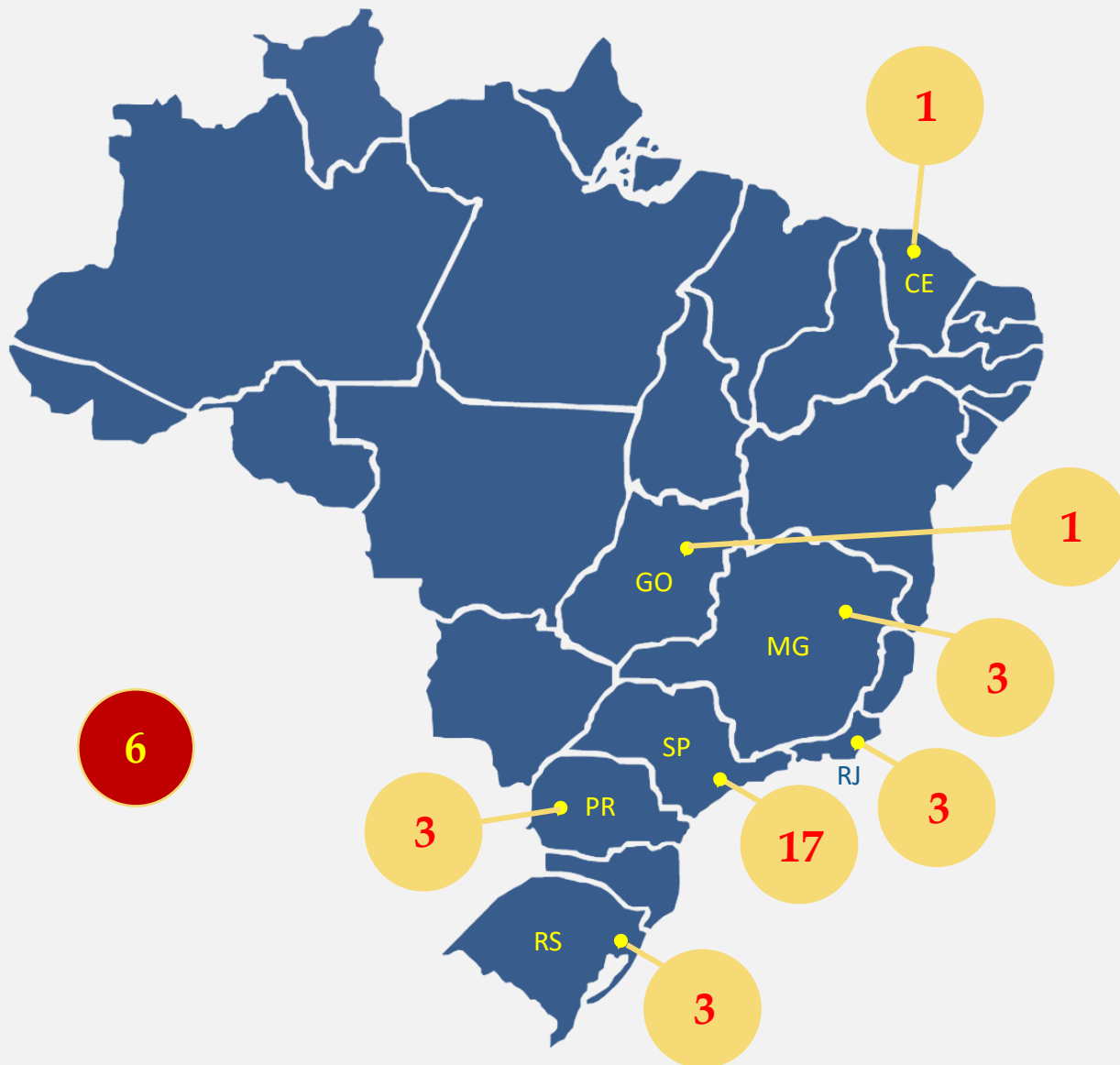


Importadores





2006 - 37 marcas



Fabricantes

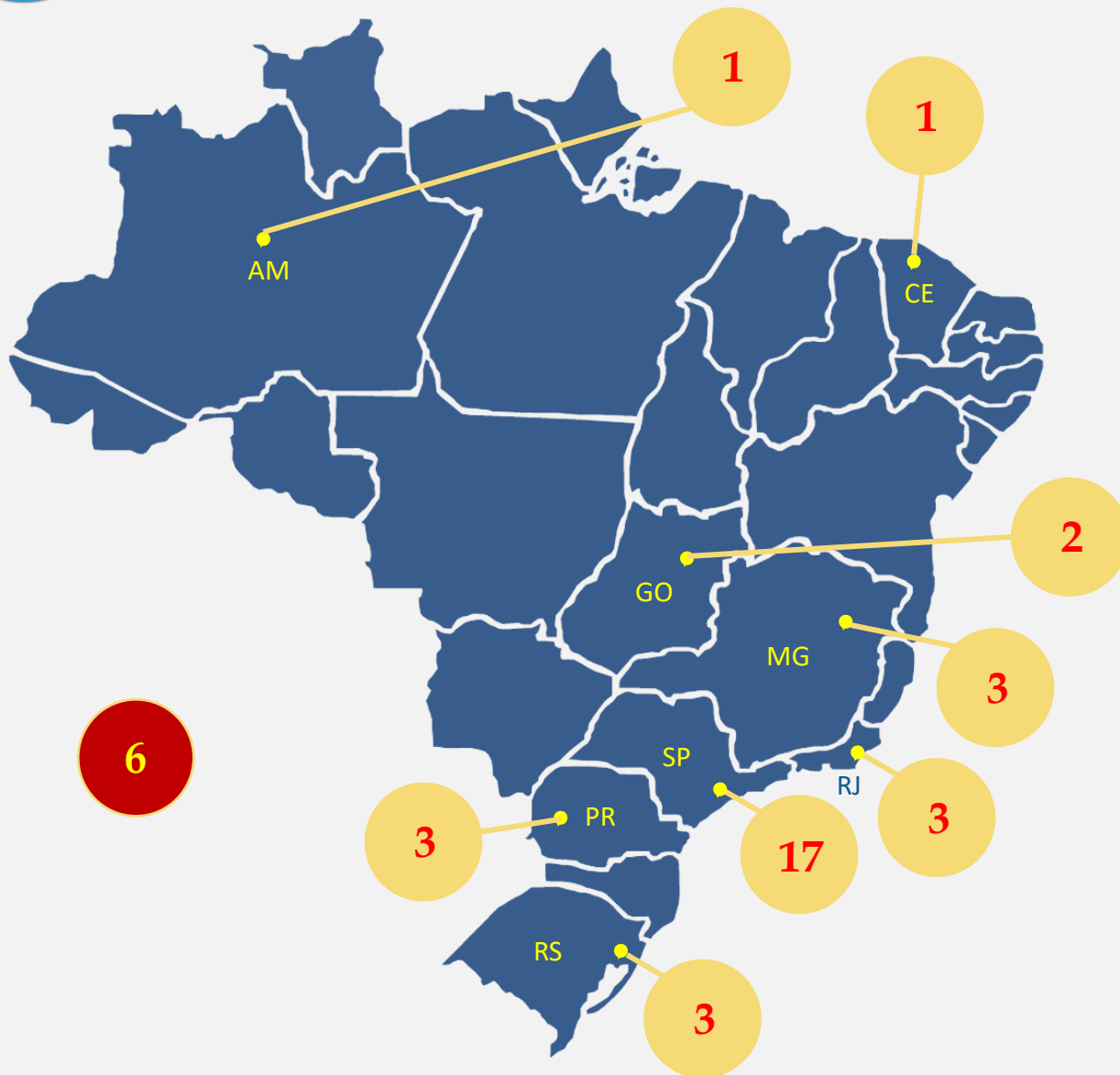


Importadores





2007 - 39 marcas



Fabricantes

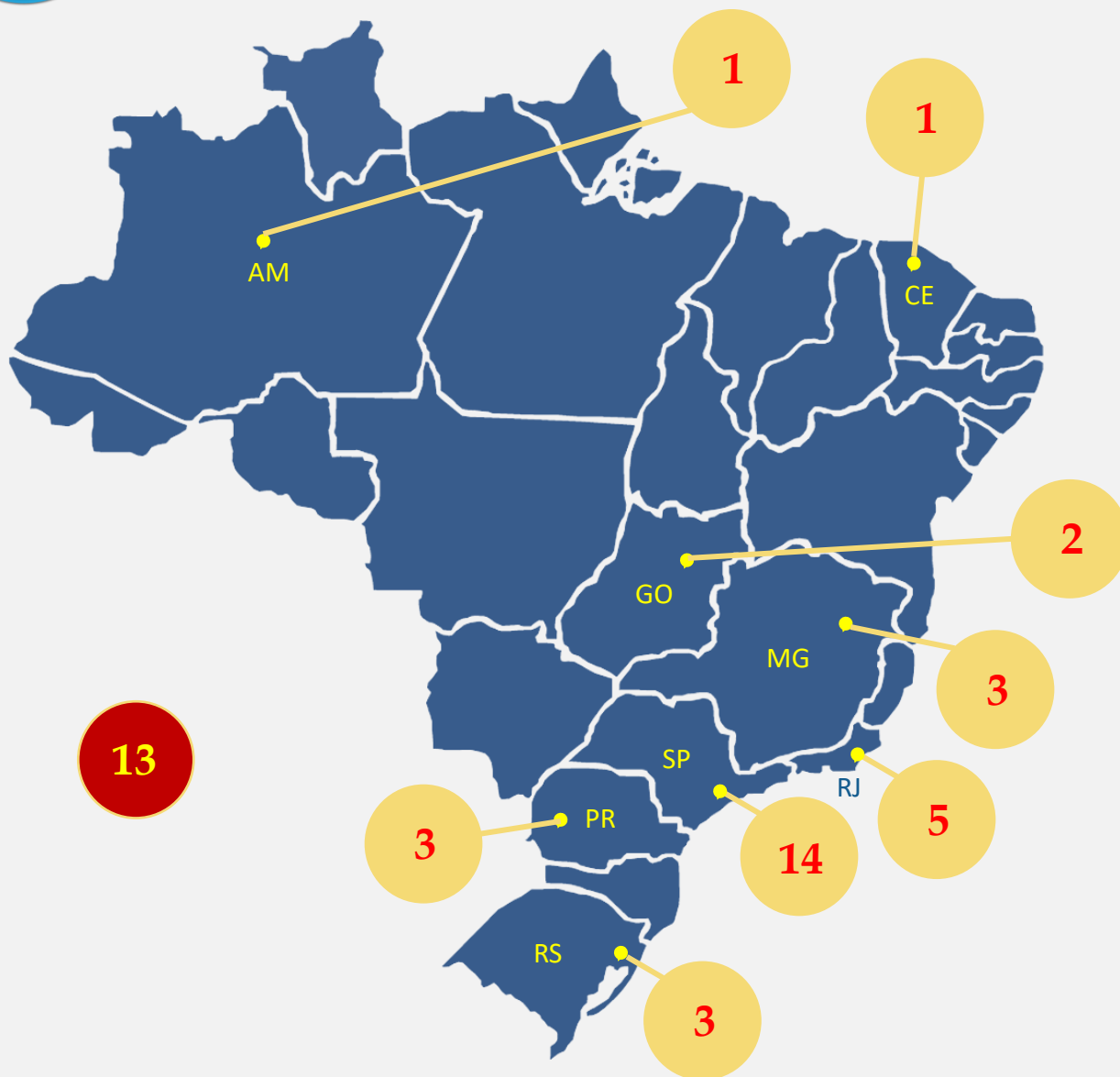


Importadores





2008 - 45 marcas



Fabricantes

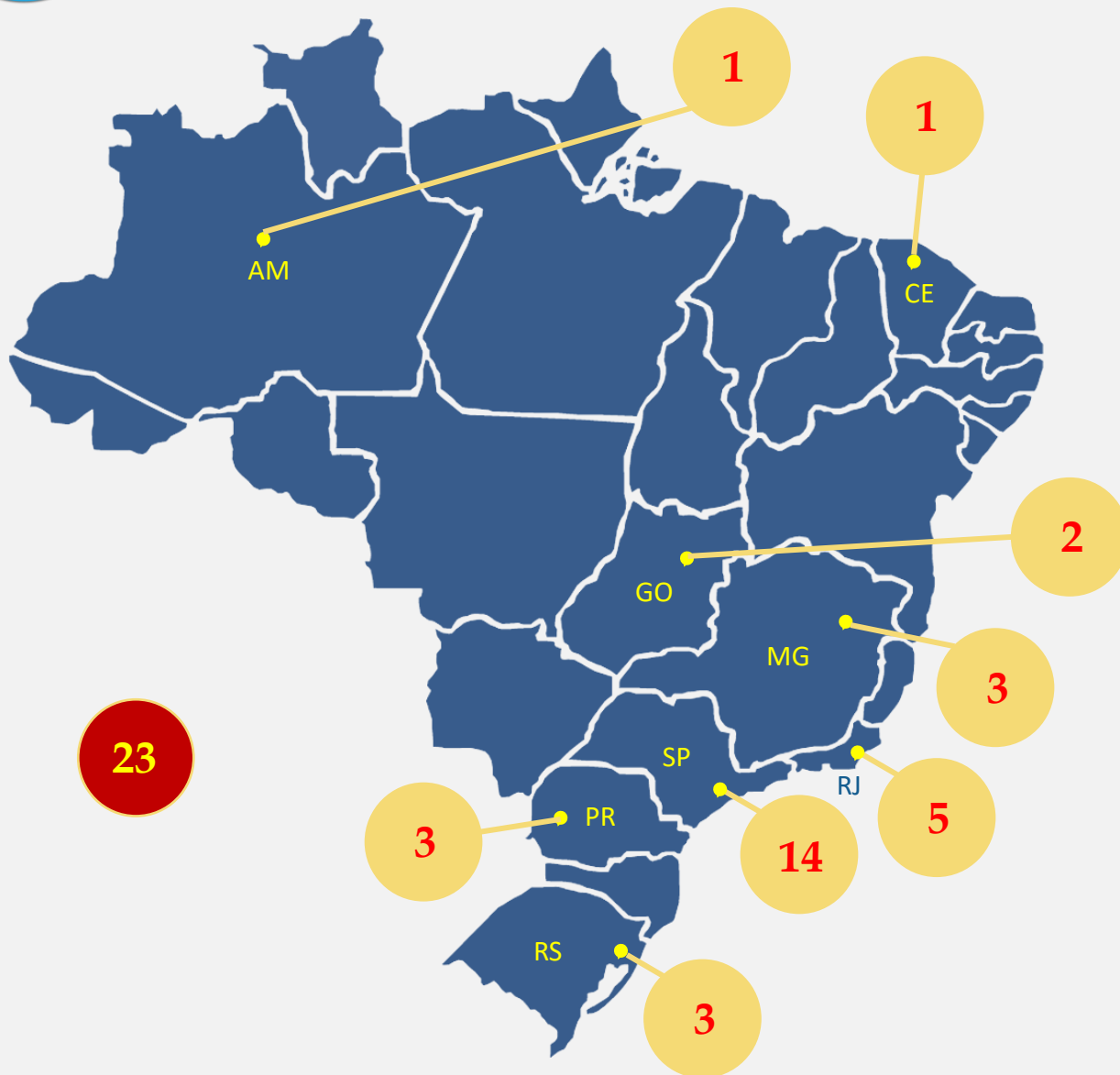


Importadores





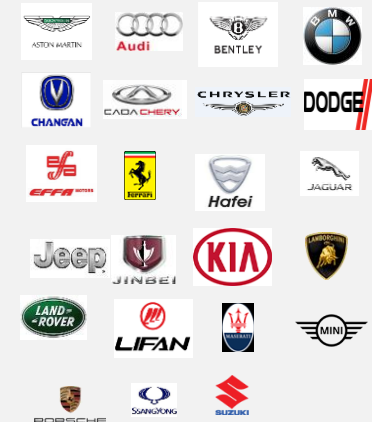
2010 - 55 marcas



Fabricantes

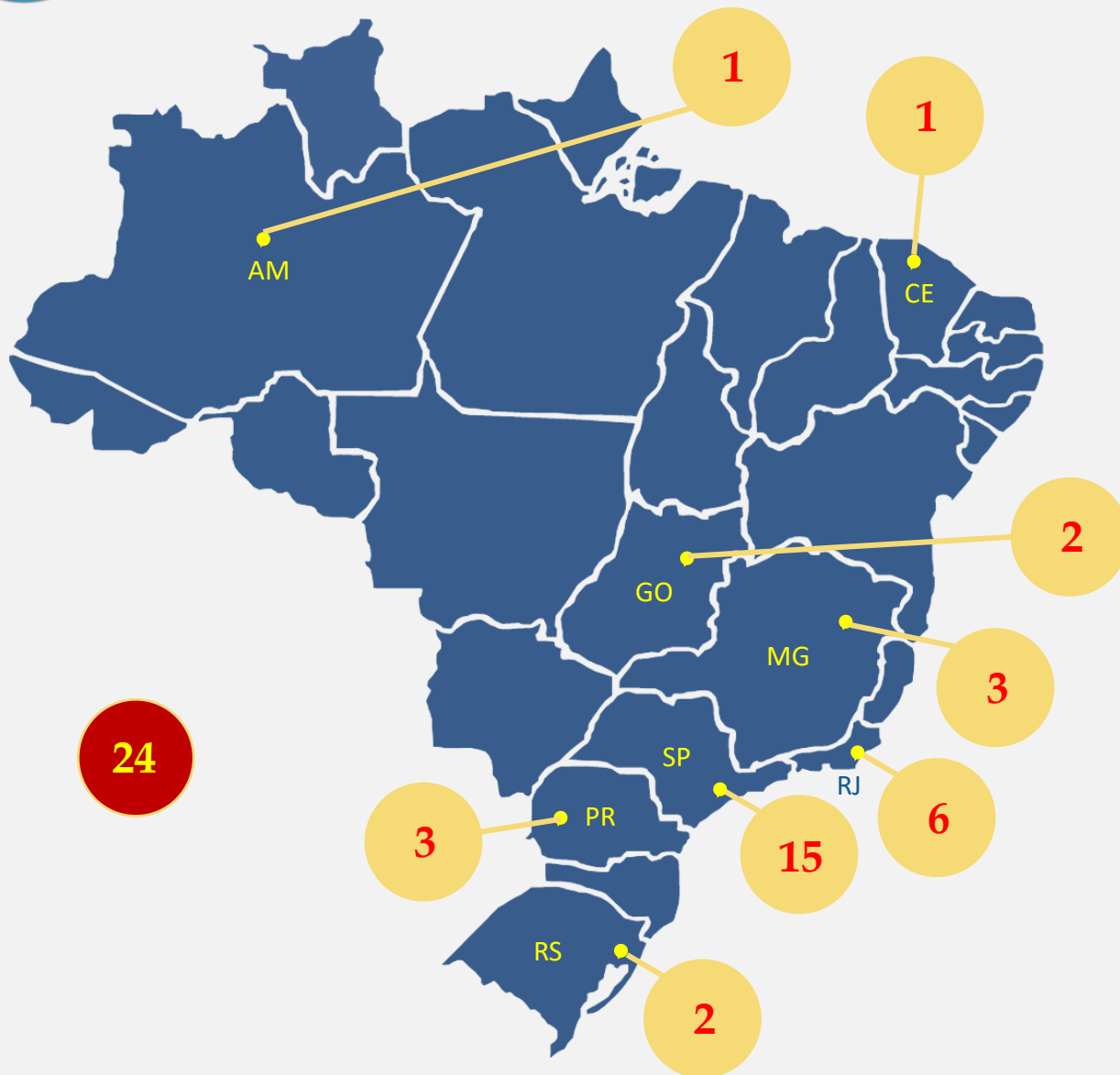


Importadores





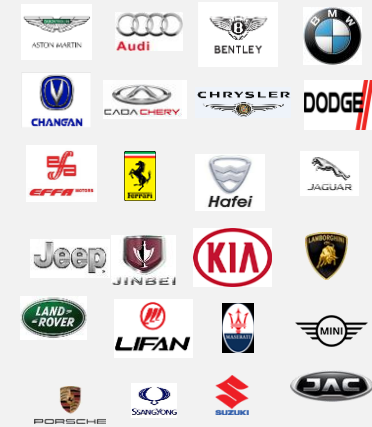
2011 - 57 marcas



Fabricantes

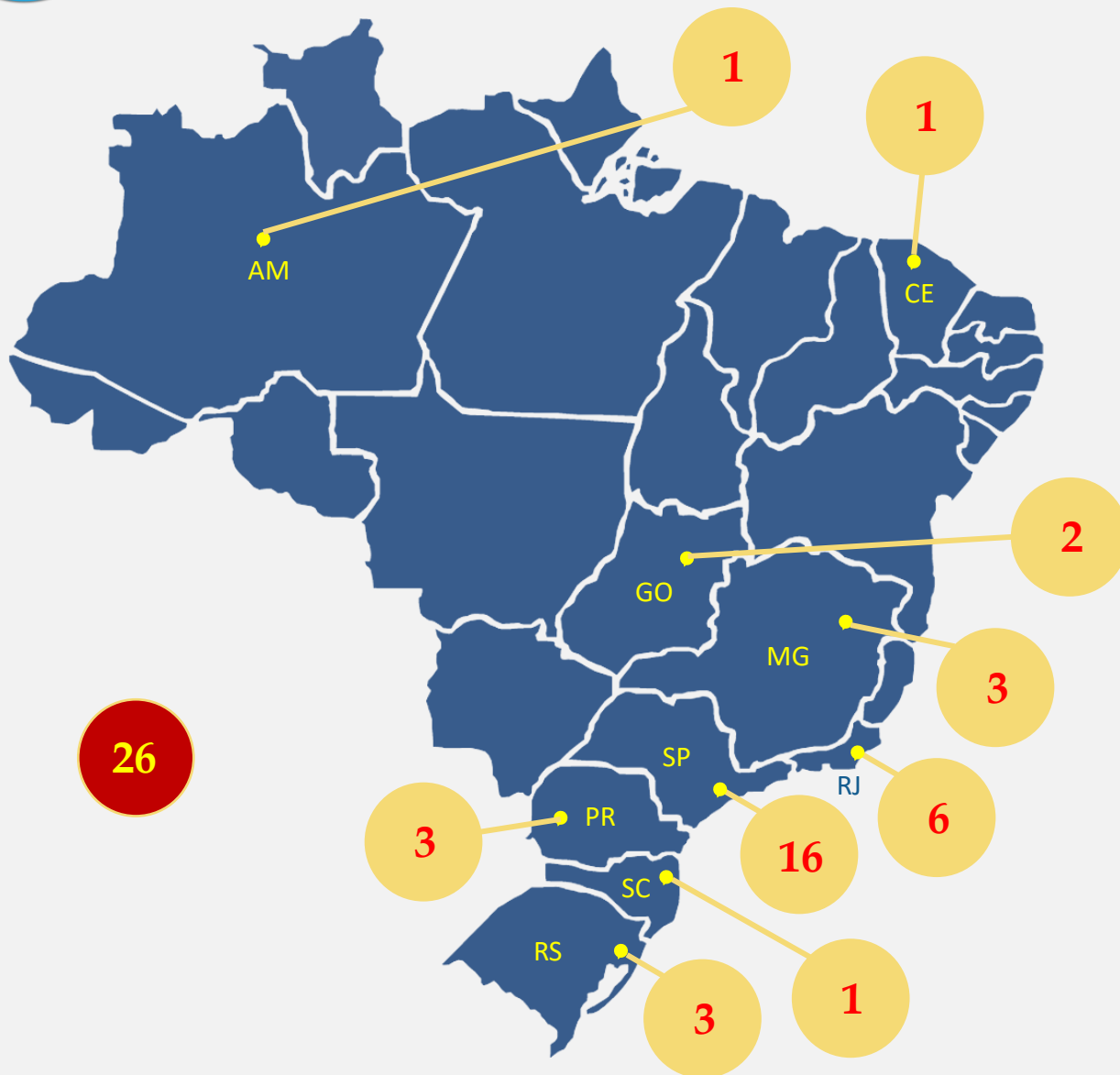


Importadores





2012 - 62 marcas



Fabricantes

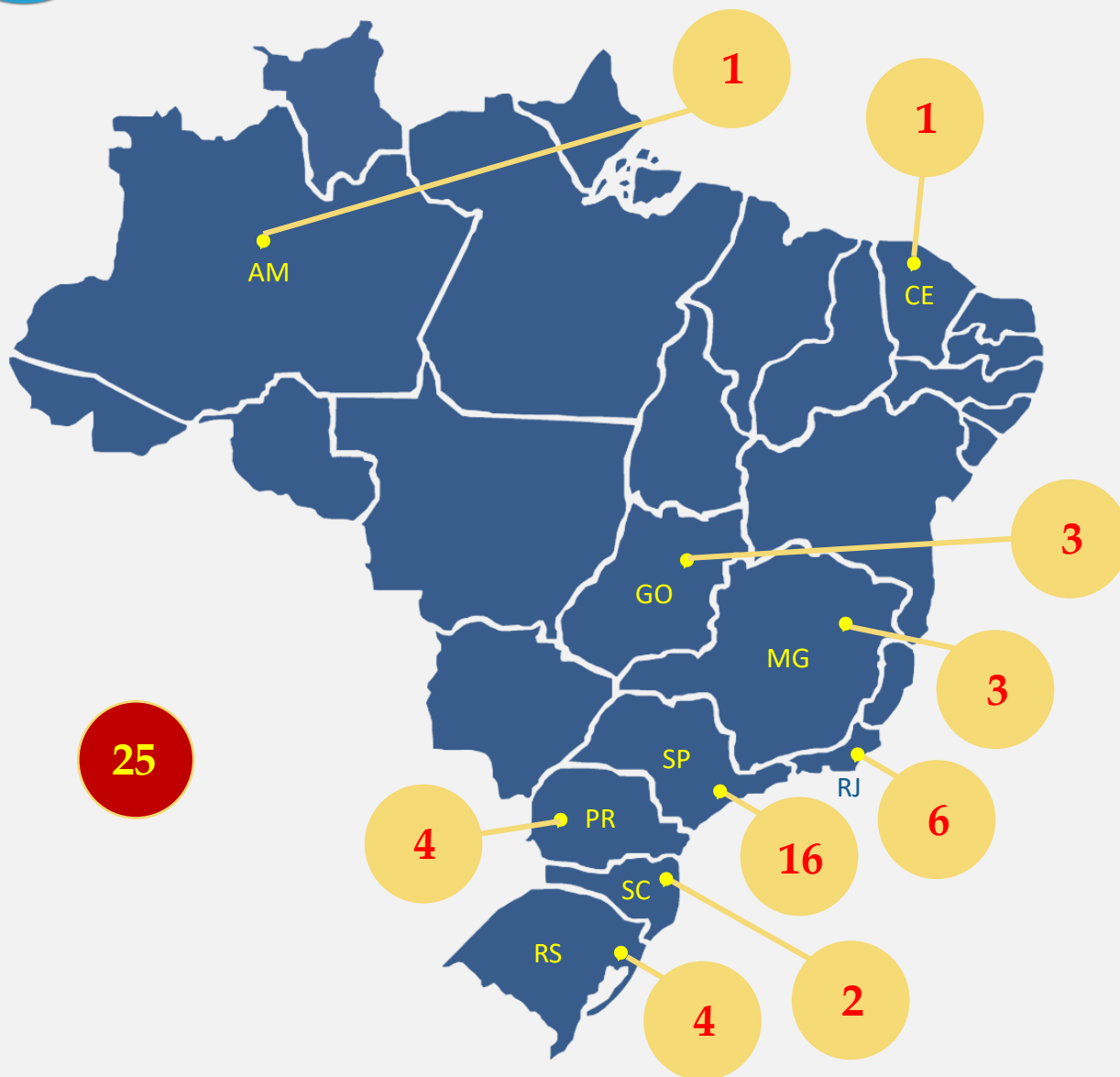


Importadores





2013 - 65 marcas



Fabricantes

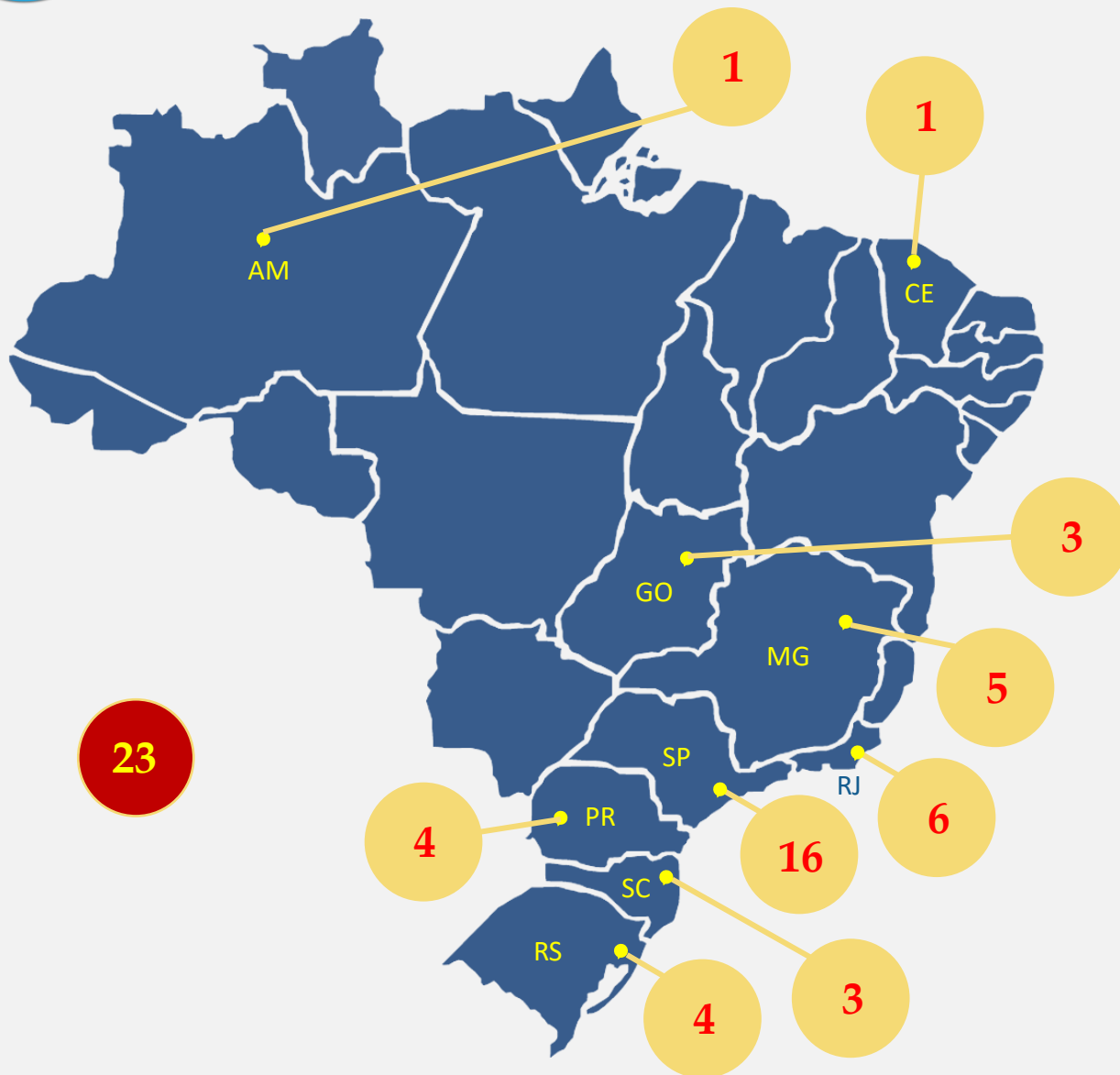


Importadores





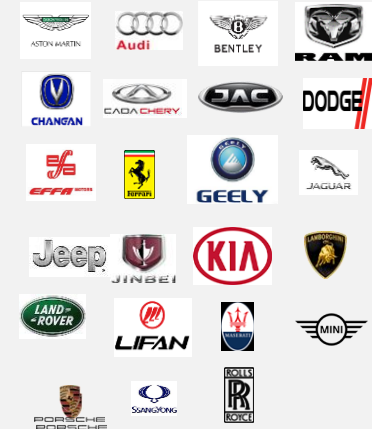
2014 - 66 marcas



Fabricantes

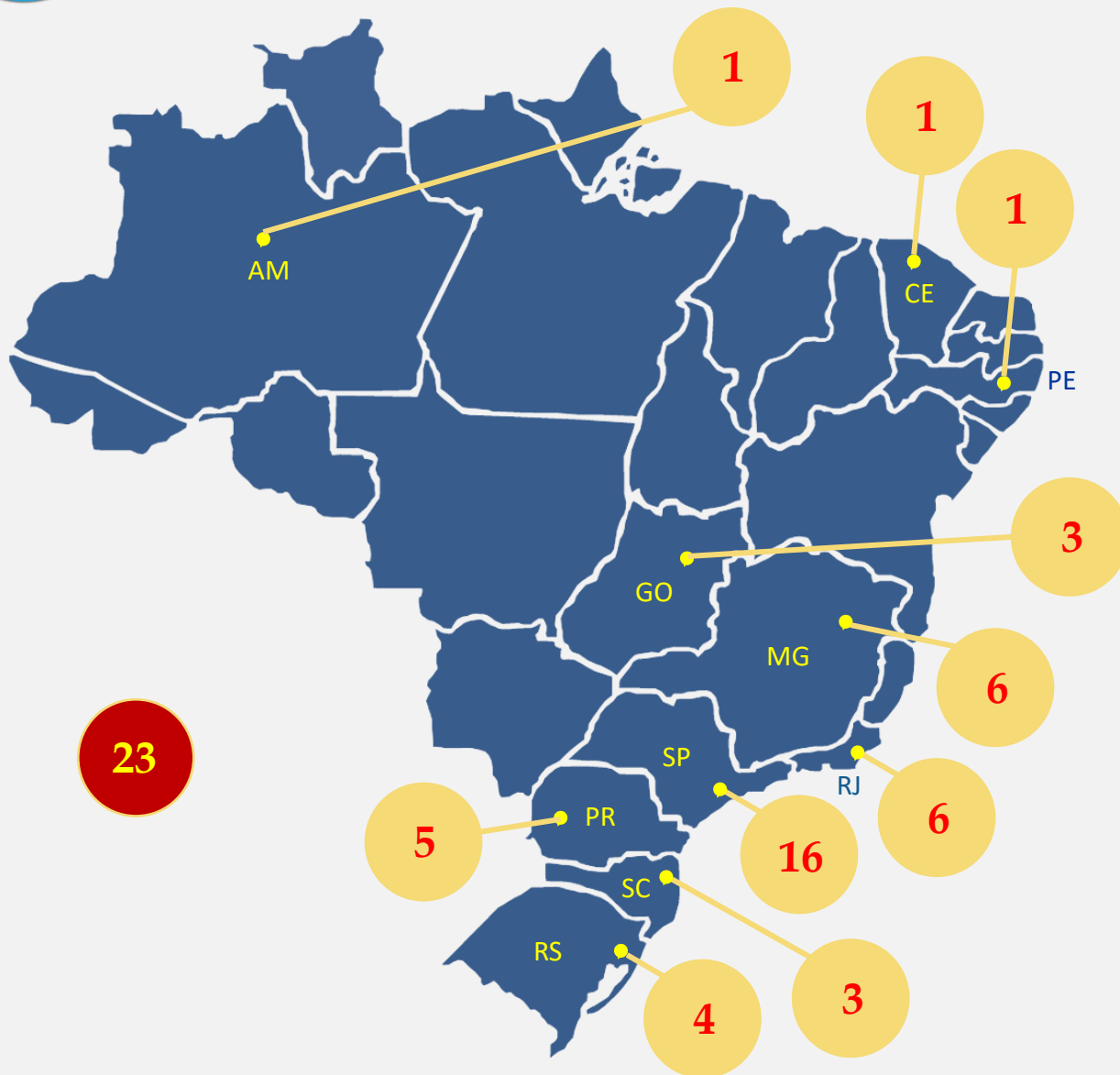


Importadores





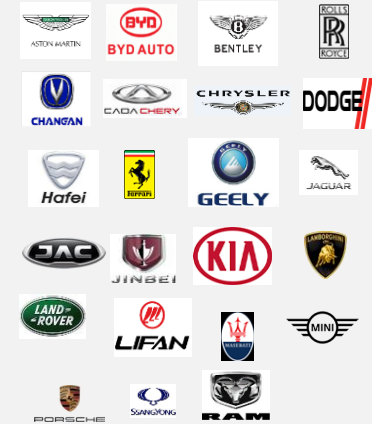
2015 - 69 marcas



Fabricantes

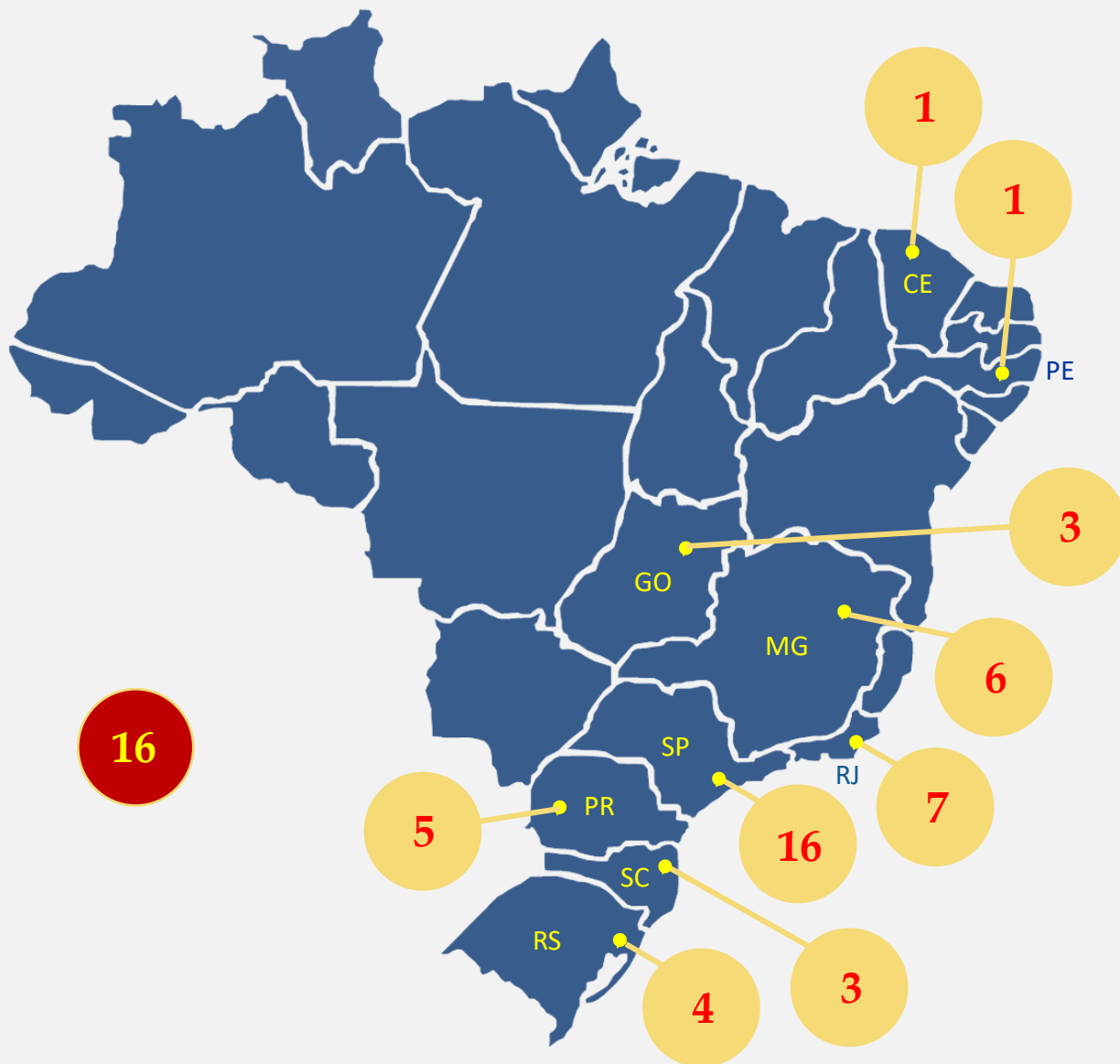


Importadores





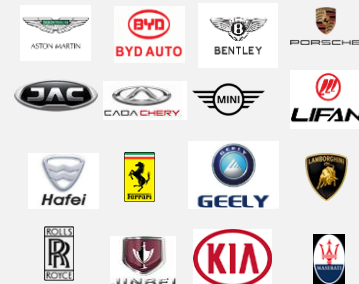
2016 - 62 marcas



Fabricantes

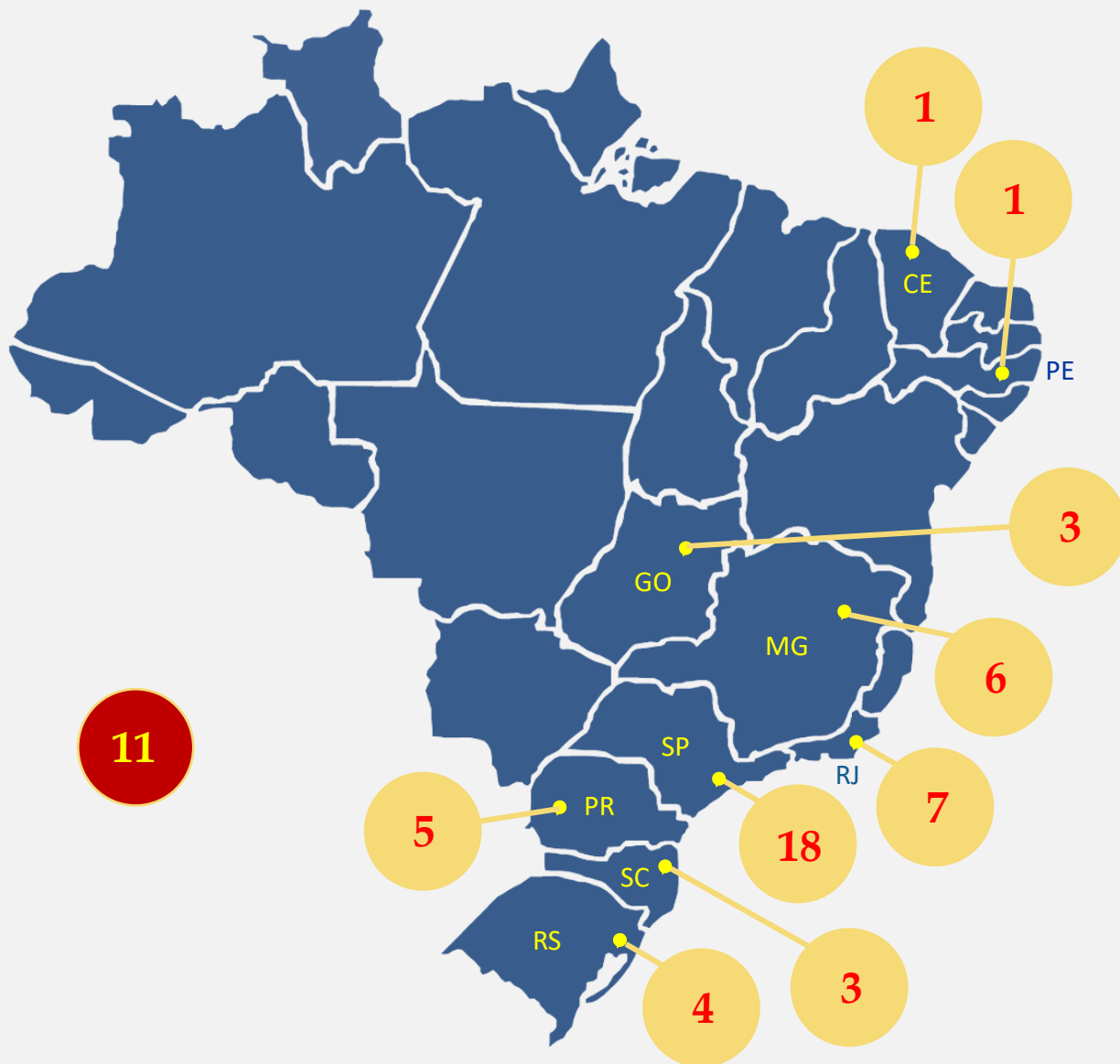


Importadores





2017 - 59 marcas



Fabricantes

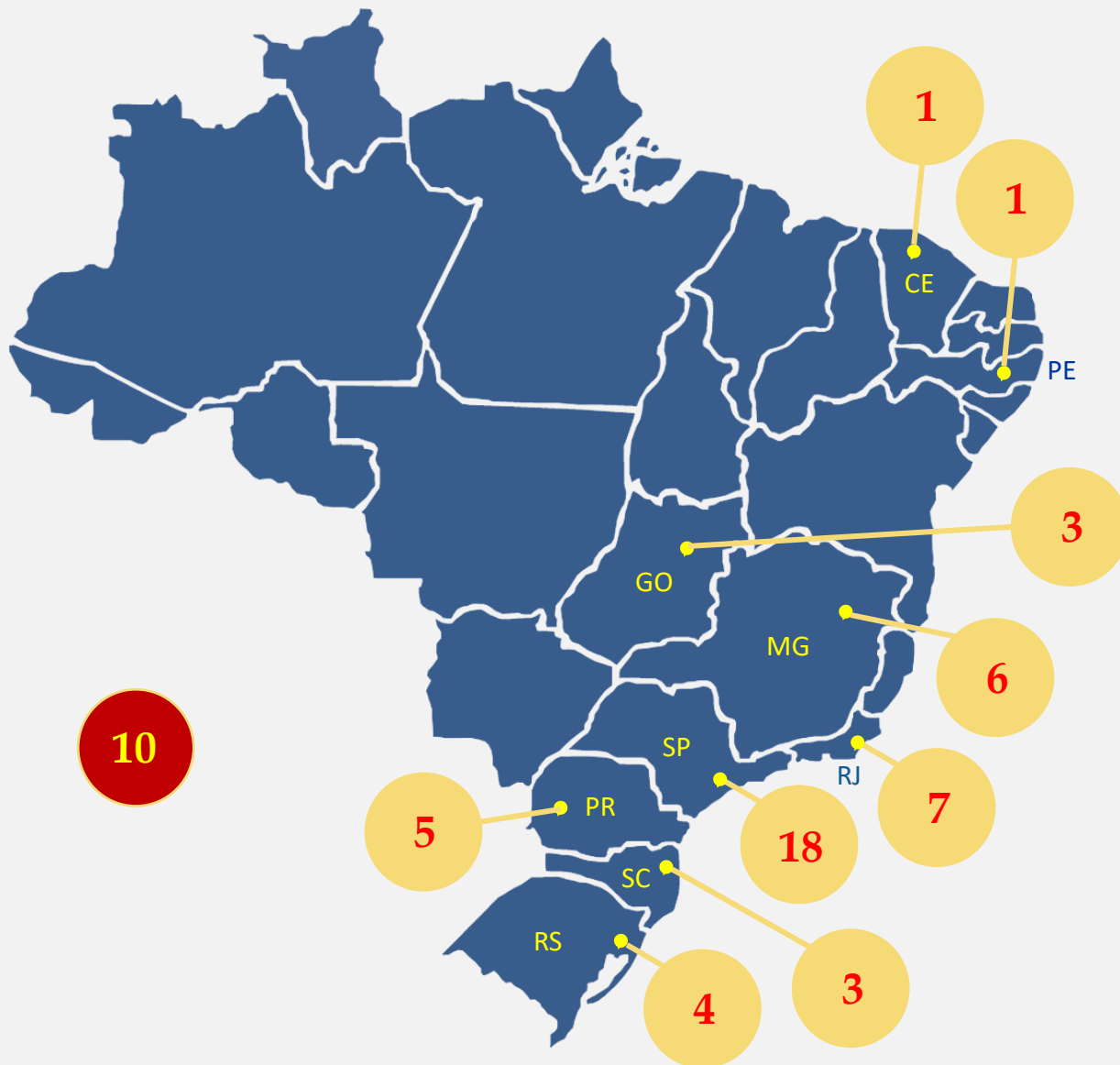


Importadores





2018 - 58 marcas



Fabricantes

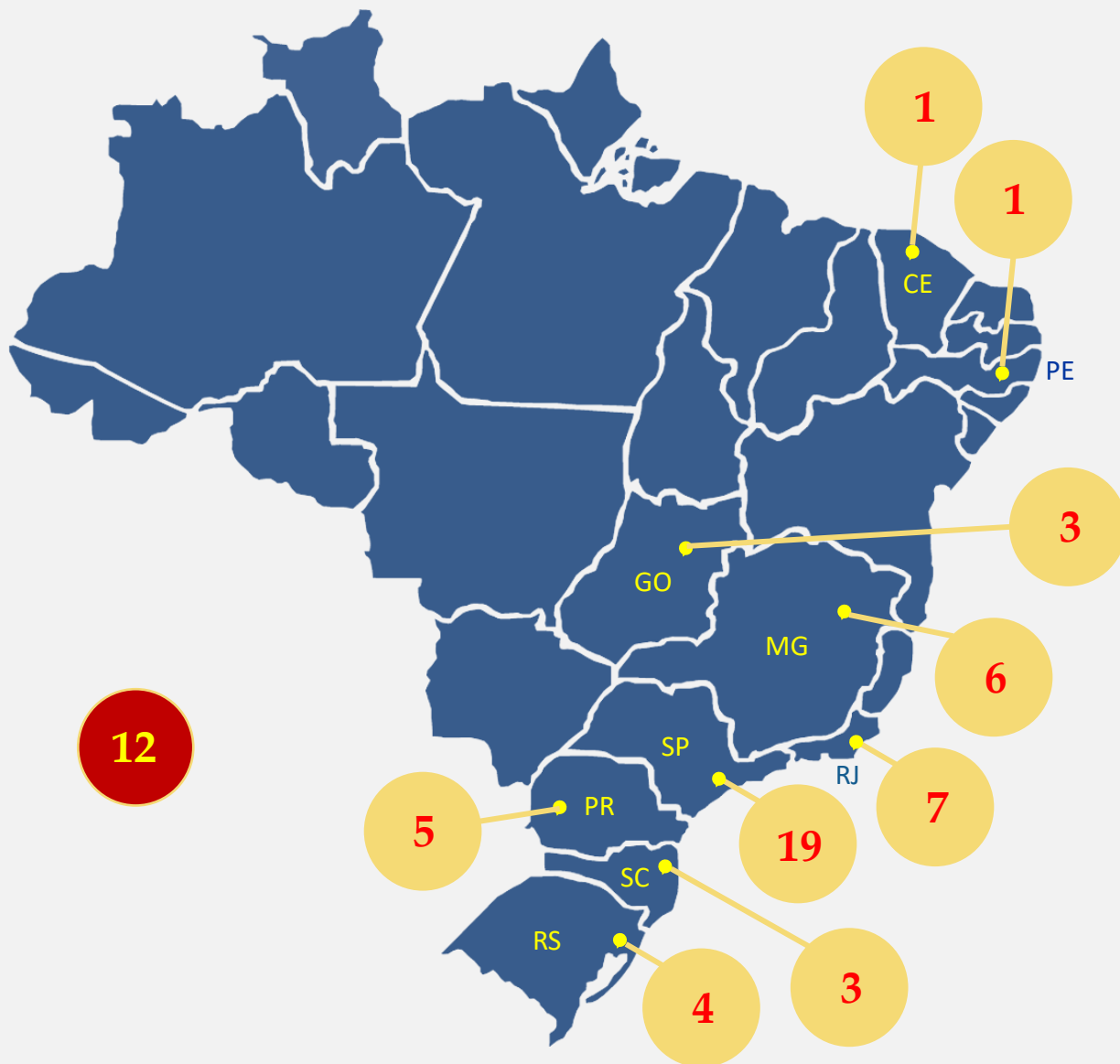


Importadores





2019 - 61 marcas



Fabricantes



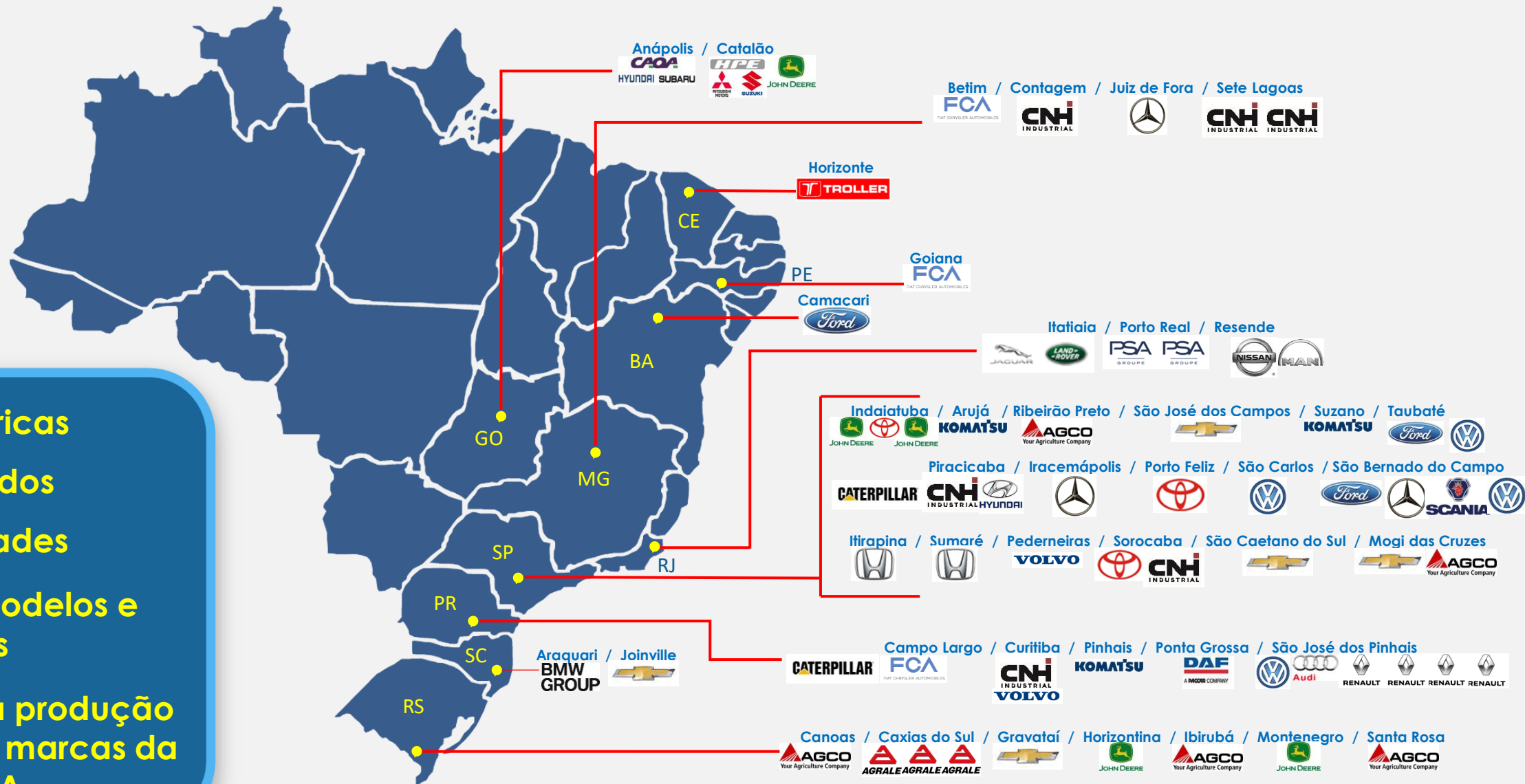
Importadores





ANFAVEA em números

- . 66 Fábricas
- . 10 Estados
- . 42 Cidades
- . 2176 Modelos e versões
- . 78% da produção global / marcas da ANFAVEA

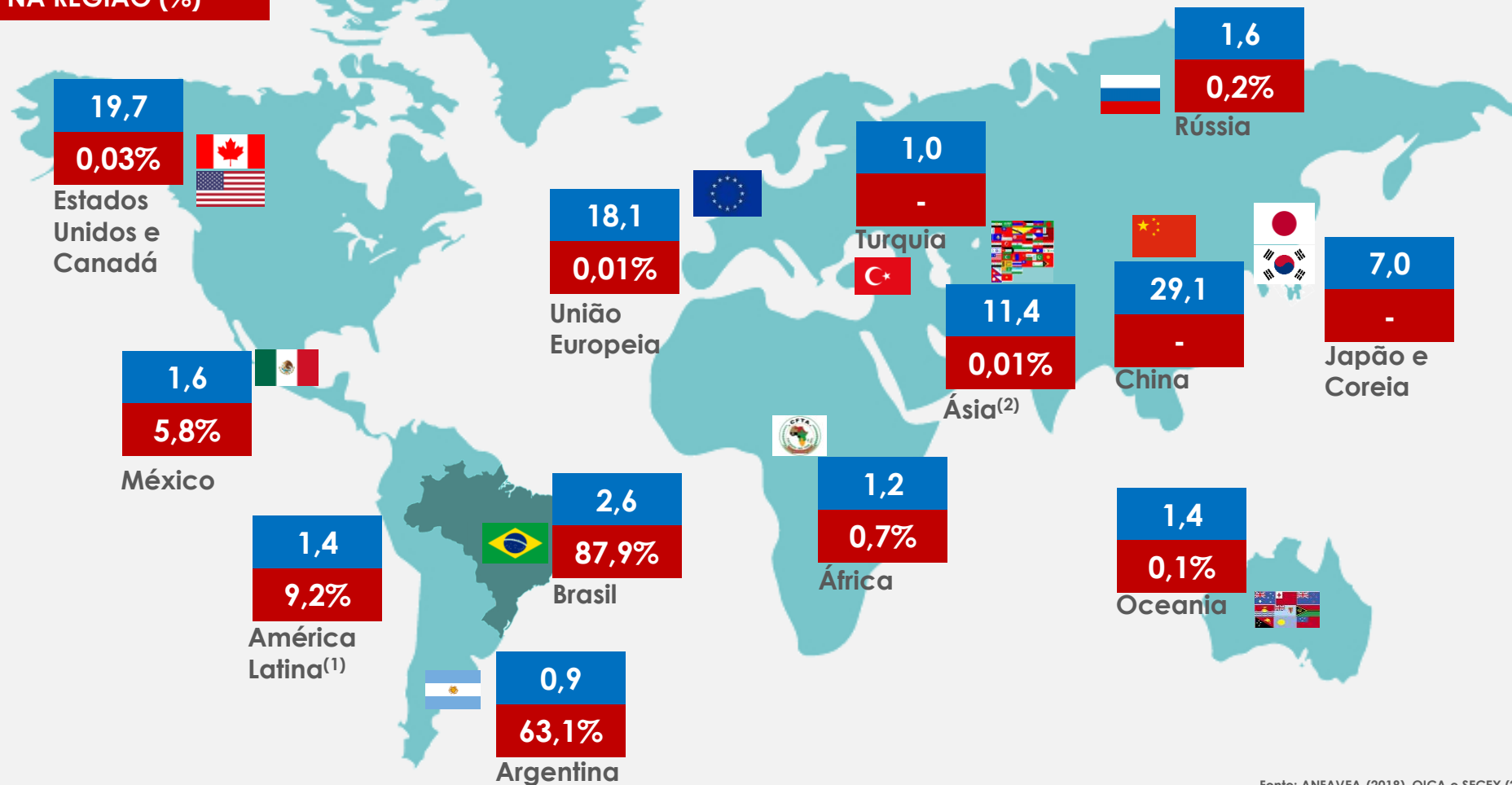




Presença do Brasil no Mundo

LICENCIAMENTO (MILHÕES DE UNIDADES)

SHARE DO BRASIL NA REGIÃO (%)



Fonte: ANFAVEA (2018), OICA e SECEX (2017/18).

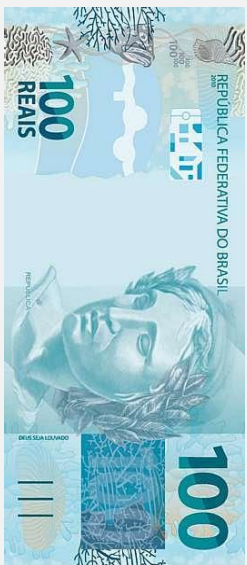
(1) Exceto México, Argentina e Brasil.

(2) Exceto China, Japão e Coreia.



Exportação: Custo do crédito acumulado de ICMS

R\$ 100 milhões de
crédito de ICMS
retidos



Prazo de retenção: 12 meses
Custo do capital de giro*: 1,25% a.m



R\$ 86 milhões



Deságio: 5%
Outros custos: 1%



R\$ 80 milhões



**A cada R\$ 100 milhões de crédito
acumulado, perde-se 20%**

