



IHS Markit®

# Cambios y tendencias económicas y del mercado automotor: Perú

## Encuentro Automotor

Guido Vildoza, Senior Manager, Americas Light Vehicle Sales Forecasts

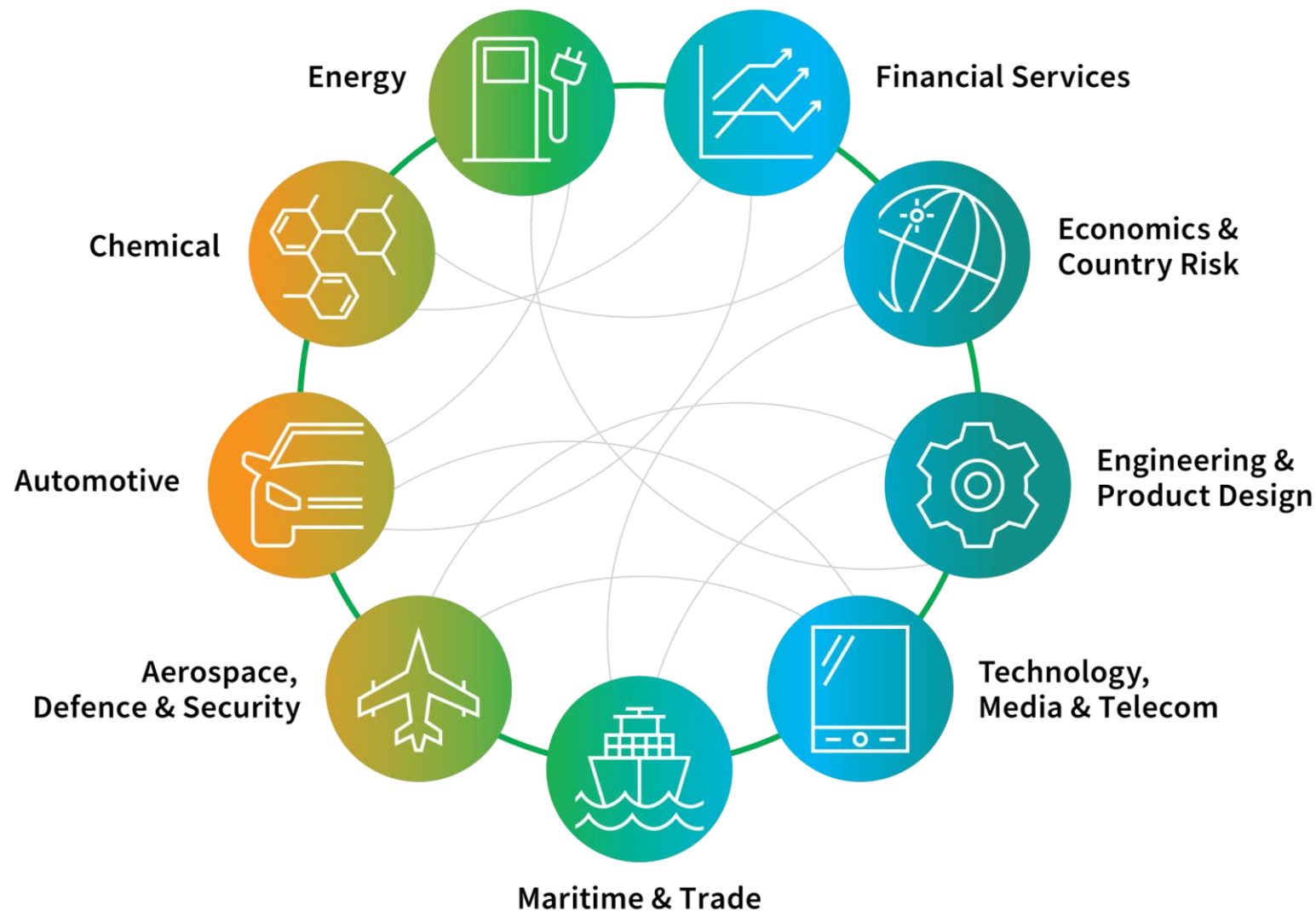
Lima, 17 de Diciembre 2019

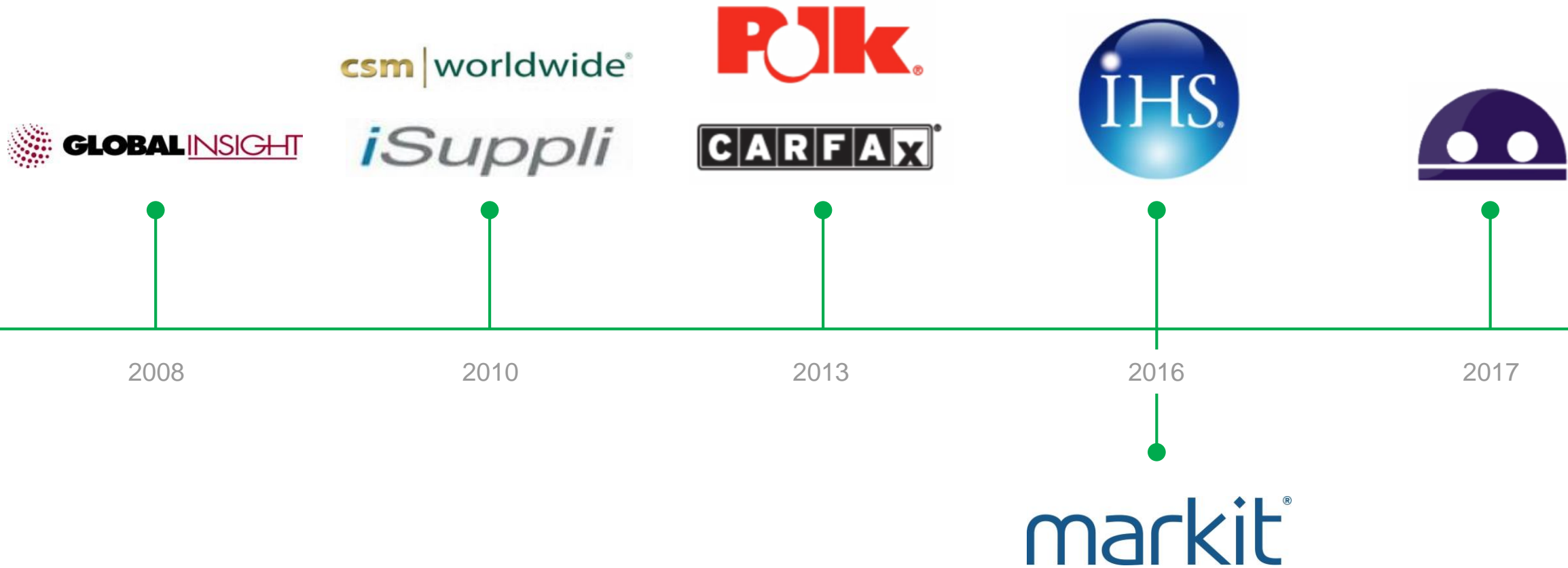
Encuentro  
Automotor AAP



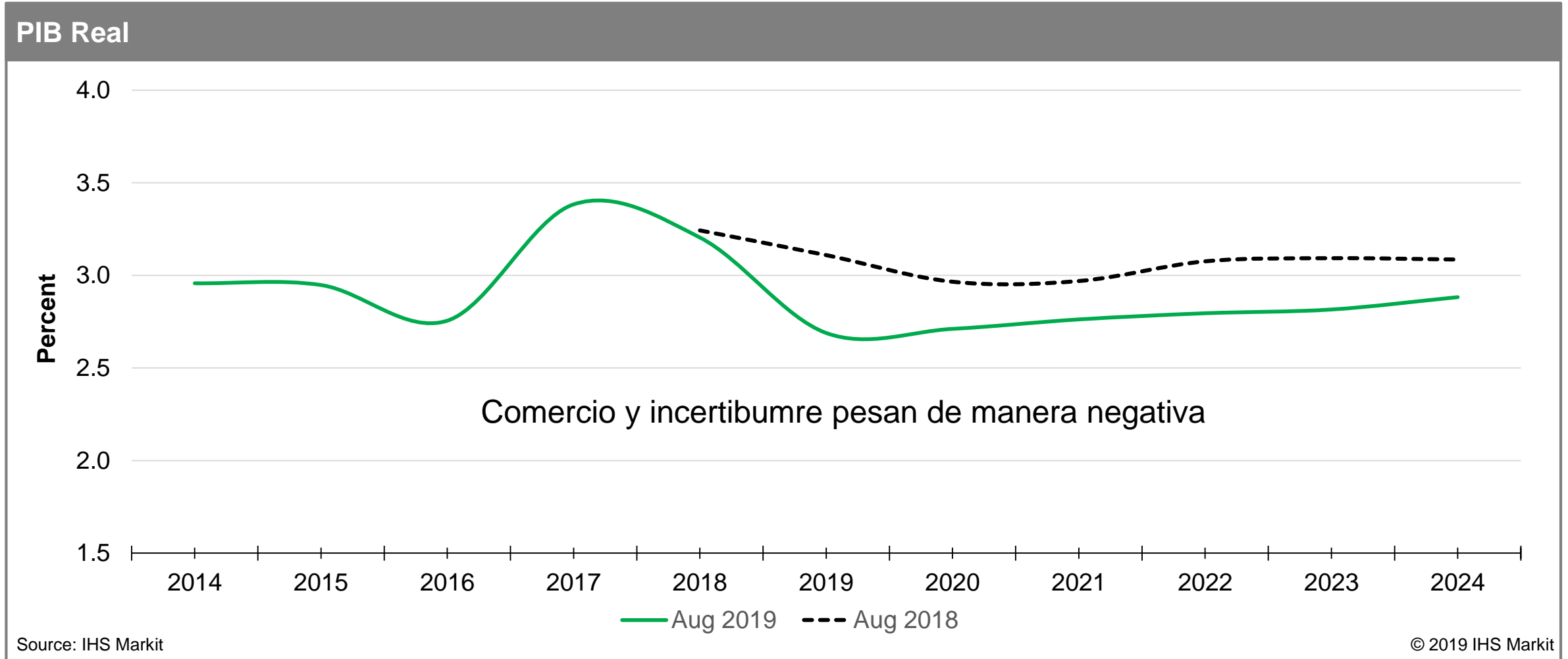
IHS Markit es una compañía de ciencia informática.

Con conocimiento en las industrias globales mas relevantes, utilizamos tecnología y ciencia para proveer datos, software y perspectivas que permitan a nuestros clientes tomar decisiones informadas.



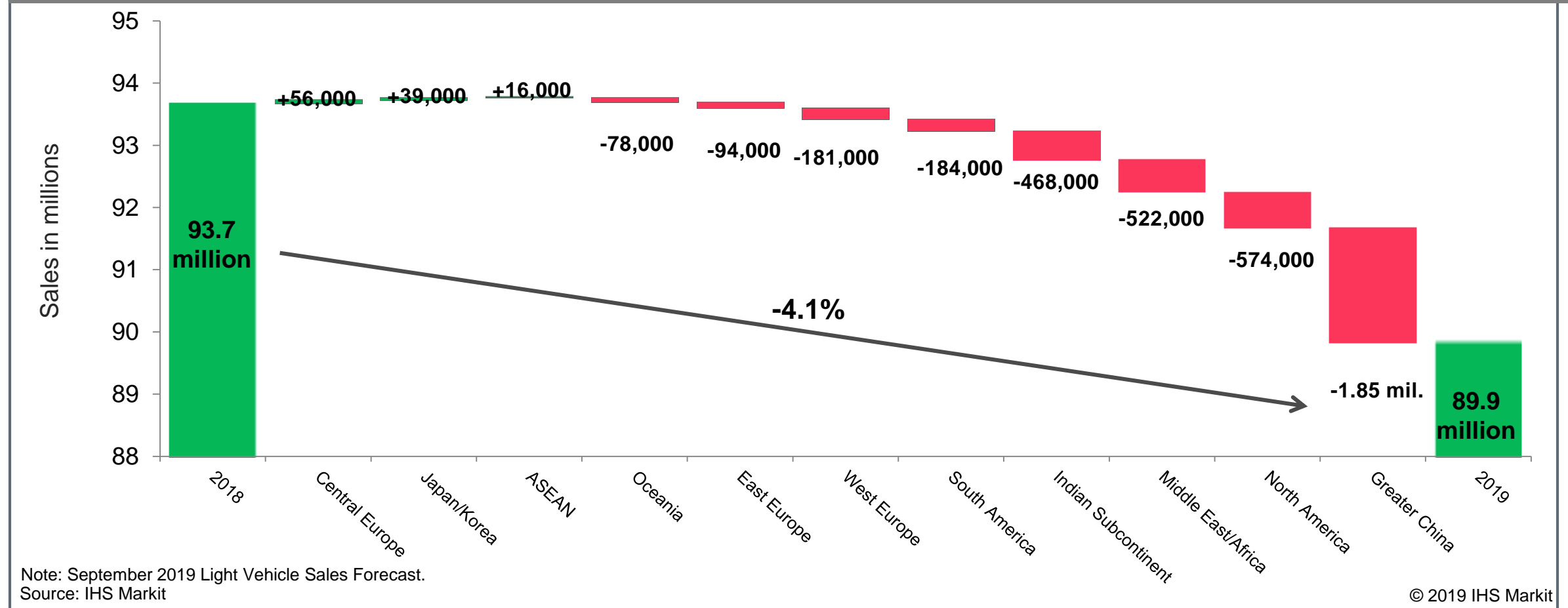


## PIB desacelerando rápidamente y antes de lo previsto, debajo de la tendencia



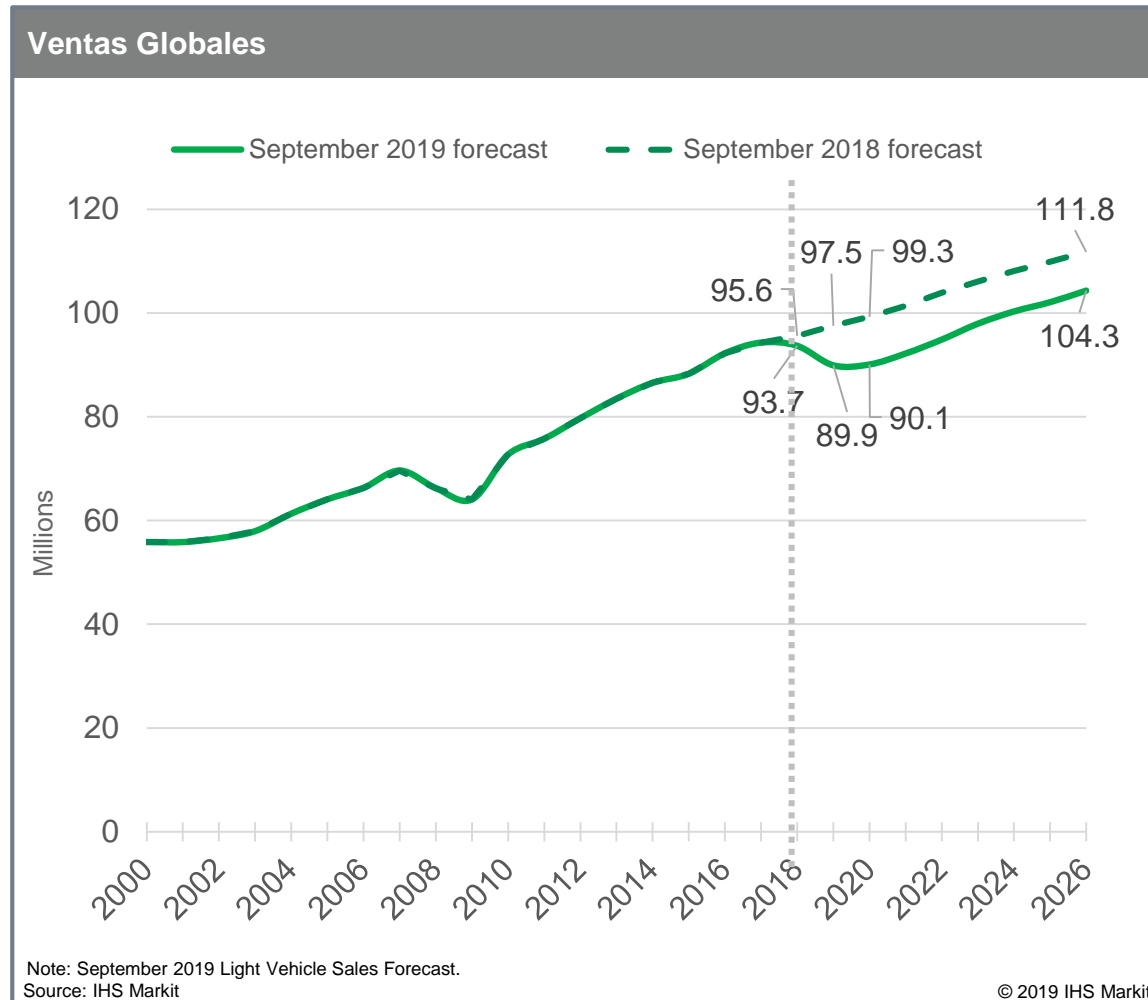
# Ventas globales automotrices 2019 vs 2018

## Caida a causa de multiples shocks globales



# Ventas globales automotrices

## Caída en demanda automotriz anticipo desaceleración económica

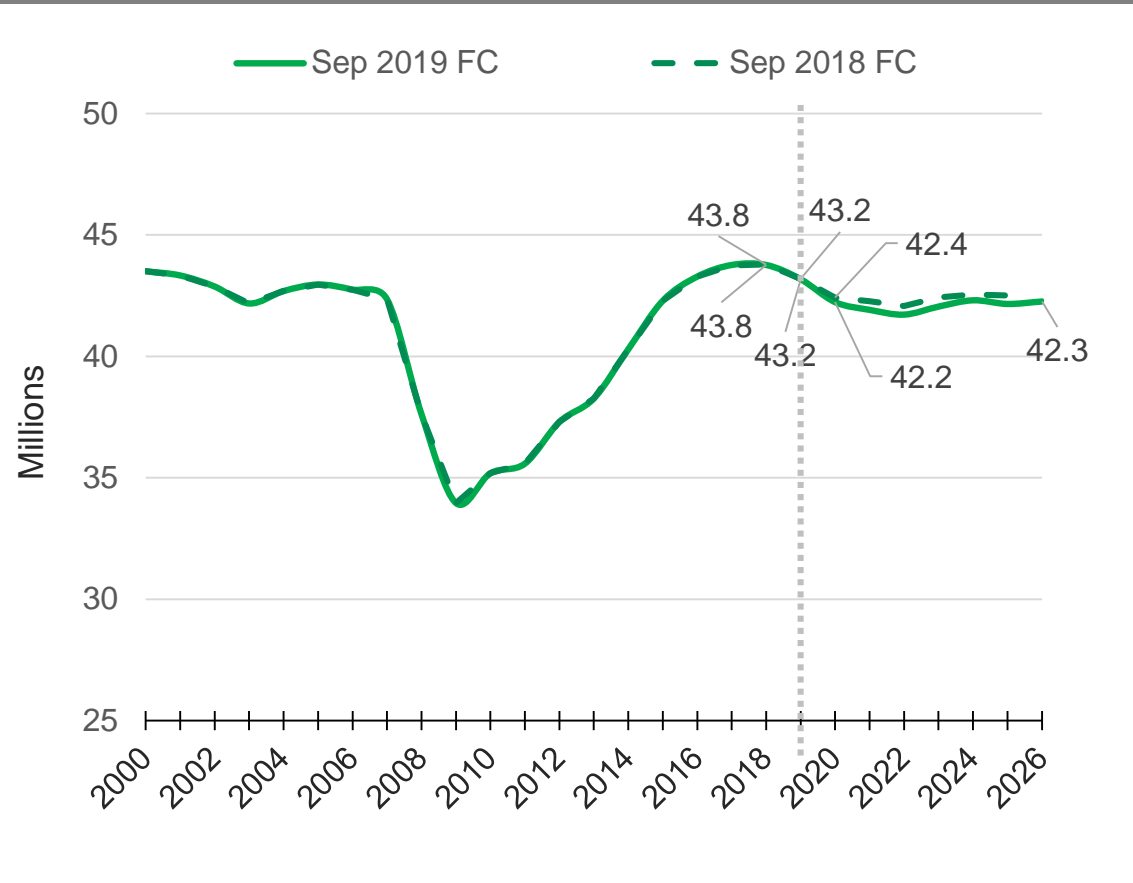


- **Demanda automotriz desincronizada del comportamiento económico durante los próximos dos años.** Dependiente de una mejora en las ventas de vehículos ligeros en China.
- **Devaluación en monedas golpea la demanda automotriz.** La industria esta dolarizada y sufre de la apreciación de la moneda.
- **Inestabilidad económica en mercados emergentes.** Pesa particularmente sobre el segmento Premium.
- **Políticas de emisiones impactan demanda automotriz.** Prevemos ventas mas débiles en India.

# Ventas globales automotrices

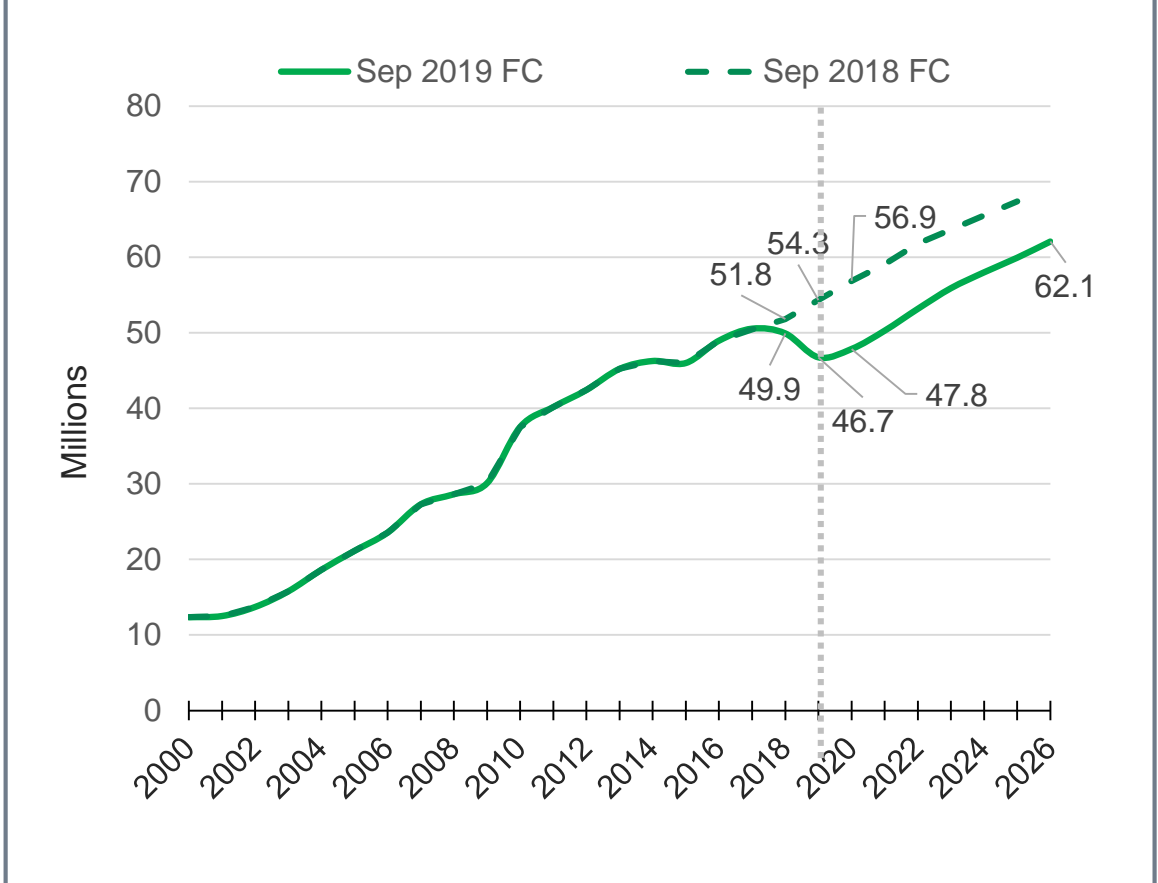
## Mercados maduros vs mercados en vías de desarrollo

### Mercados Maduros



Note: September 2019 Light Vehicle Sales Forecast; mature markets: West Europe, US, Canada, Japan, South Korea, Oceania.  
Source: IHS Markit © 2019 IHS Markit

### Mercados Emergentes



Note: September 2019 Light Vehicle Sales Forecast.  
Source: IHS Markit

© 2019 IHS Markit

# Fuerzas detrás de la Industria Automotriz Global



Riesgos conocidos

Riesgos conocidos impredecibles

Riesgos desconocidos

- Mezcla de segmentos y tecnologías
- Desarrollo de nuevas motorizaciones y transmisiones ha decaído precipitosamente
- Nuevos players tanto en armadoras como proveedores
- Incertidumbre en el proceso de electrificación
- Los valores de la industria (actualmente carros eléctricos y autónomos) es posible cambien
- Cada empresa surca su propio camino en ACES, no todas triunfarán
- Eventos/Políticas que impacten demanda automotriz
- Uniones/sociedades desconocidas como ser FCA/PSA
- Nuevas tecnologías y innovaciones

***Cada empresa enfoca sus ganancias para afrontar estos retos***

Note 1: ADAS = advanced driver assistance systems; EV = electric vehicle; AV = autonomous vehicle; ACES = autonomous, connectivity, electrification, & shared vehicles

Note 2: Electrification is defined as hybrid vehicles such as MHEVs, FHEVs and PHEVs, electric vehicles, and hydrogen fuel cell vehicles



# 1. Influencia de China—Volumen, tecnología y escala

China paso de ser la mitad de EUA a ser dos veces su Mercado en un periodo de 20 años



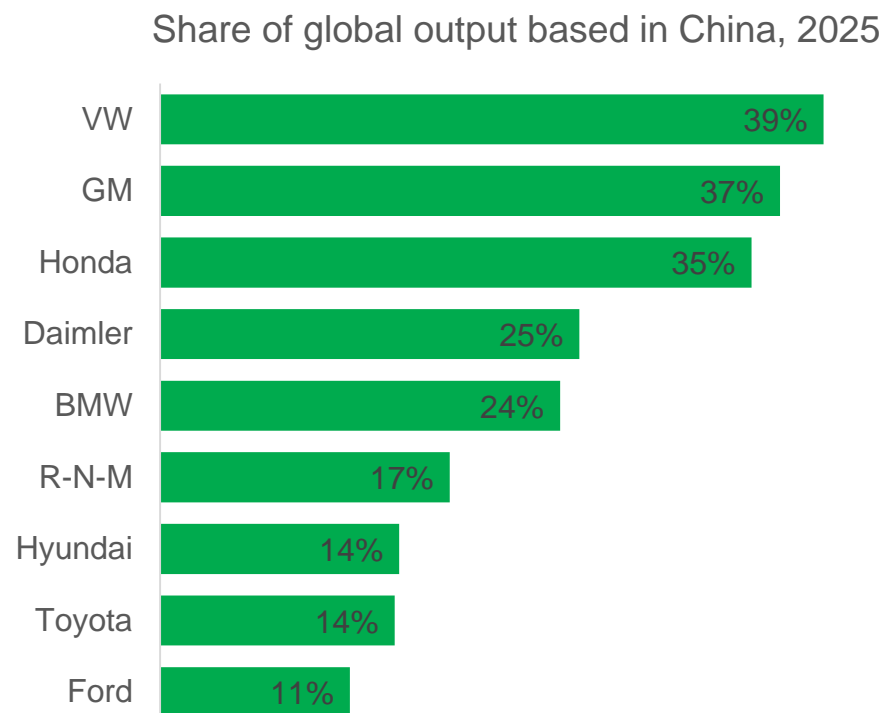
## “Impacto Chino”

- Regulaciones Chinas influncian el Desarrollo tecnológico de muchas empresas
- China tiene mayor similitud en segmentos modelos a mercados globales lo cual causa se vuelva un centro de desarrollo importante

Source: IHS Markit

© 2019 IHS Markit

Dependencia en China determina motorizaciones y modelo de vehículos

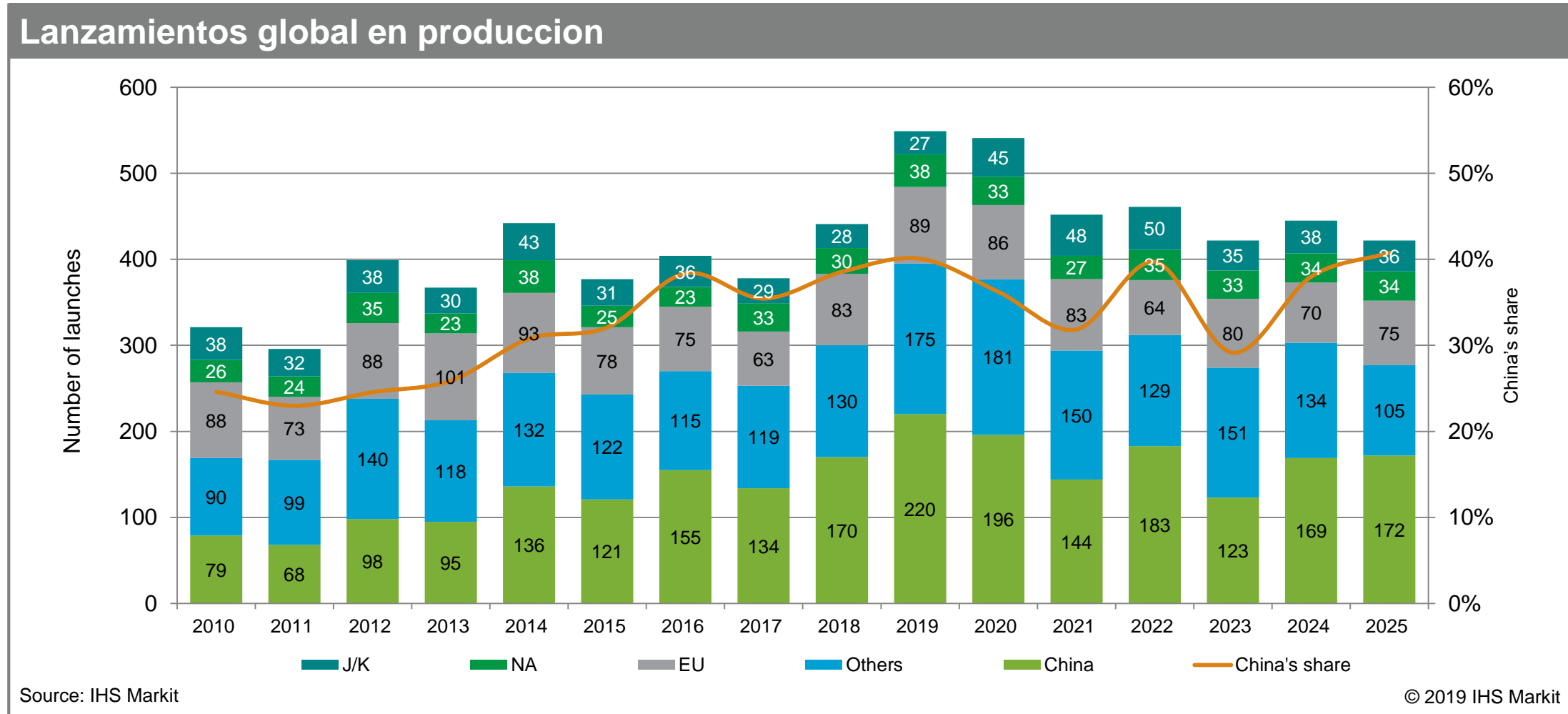


Source: IHS Markit

© 2019 IHS Markit

# China representa el 40% de los programas nuevos lanzados el 2019

Anticipamos próximamente su política energética tenga un mayor rol global en motorizaciones



# Definición de Electrificación

## ICE



Nissan Kicks

## ICE: Start/Stop



Jeep Renegade

## Hybrid-Mild



MB C200 EQ Boost

## Hybrid-Full



Toyota Corolla

## BEV



Tesla Model 3

## FCV



Toyota Mirai

## Hybrid-Plug In

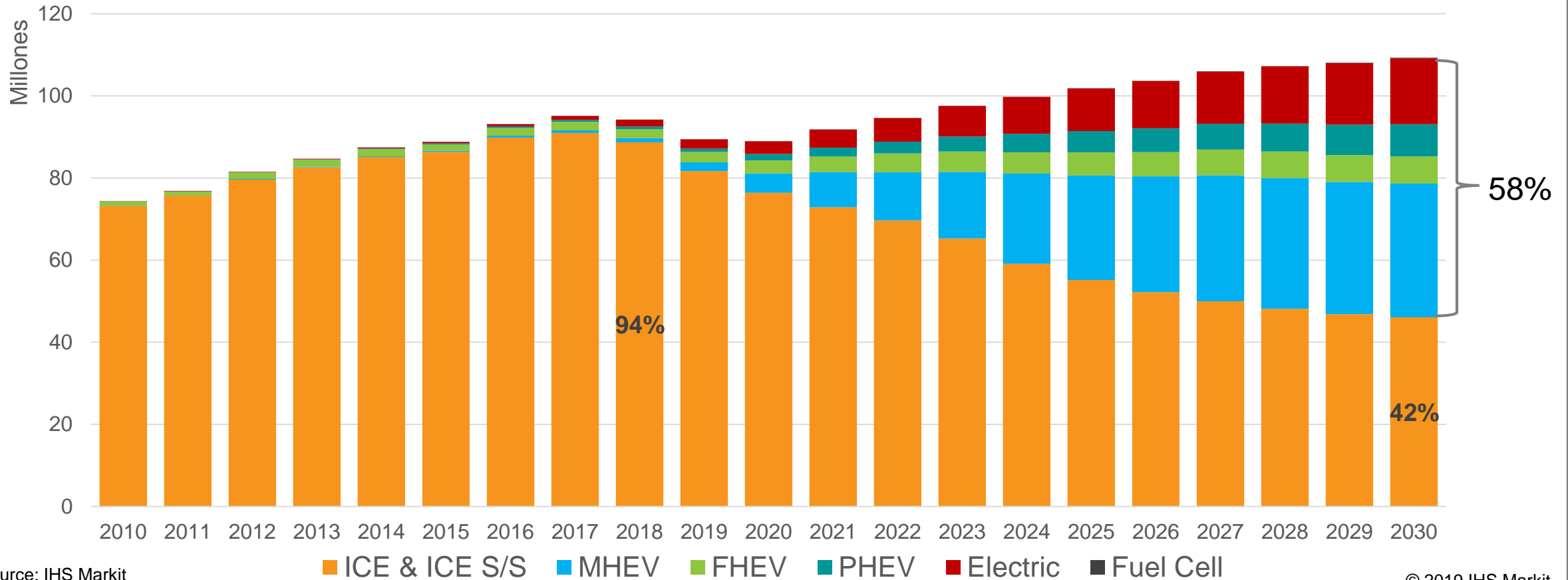


Volvo XC60

## Electrificación

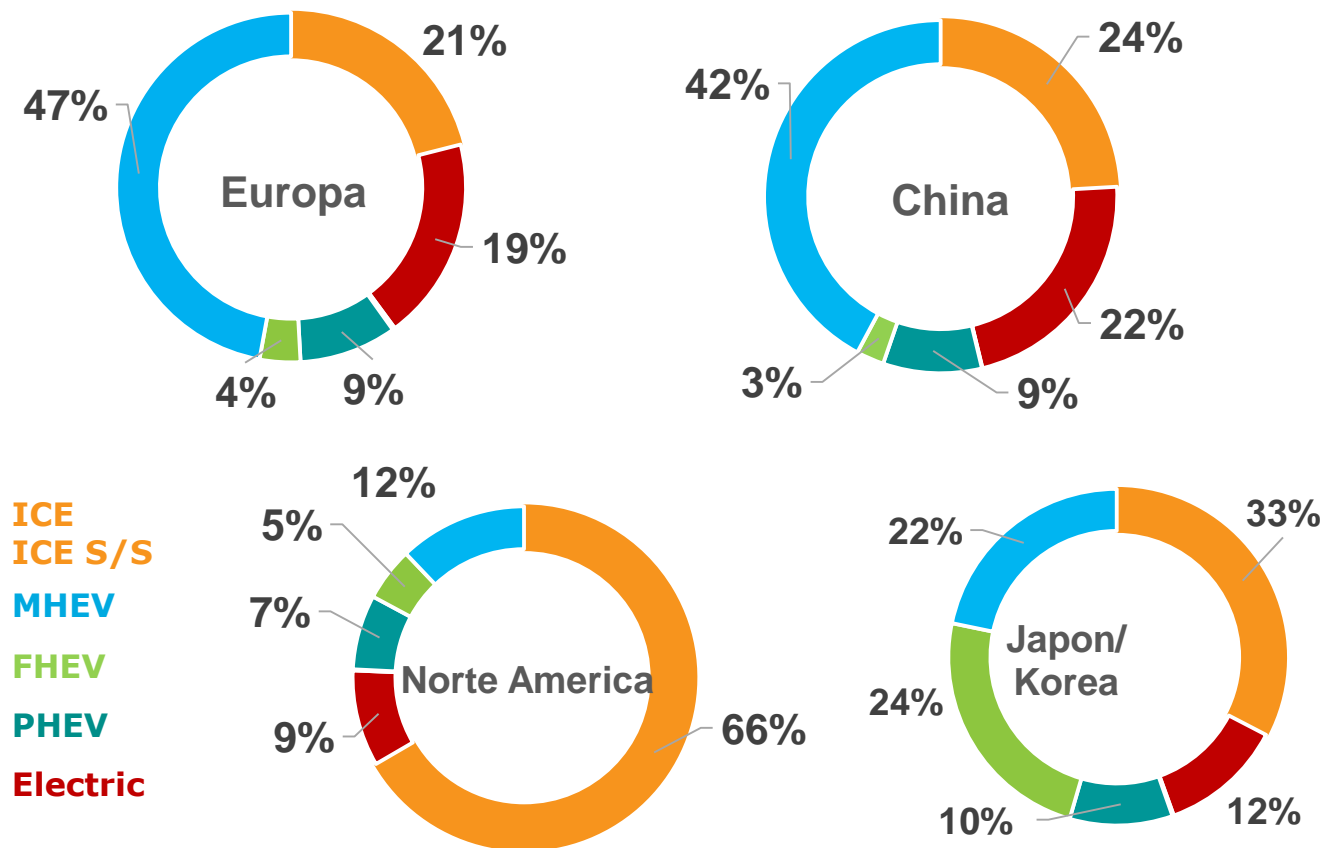
## 2. Electrificación representa 58% del mercado global el 2030

Producción Global por tipo de propulsión



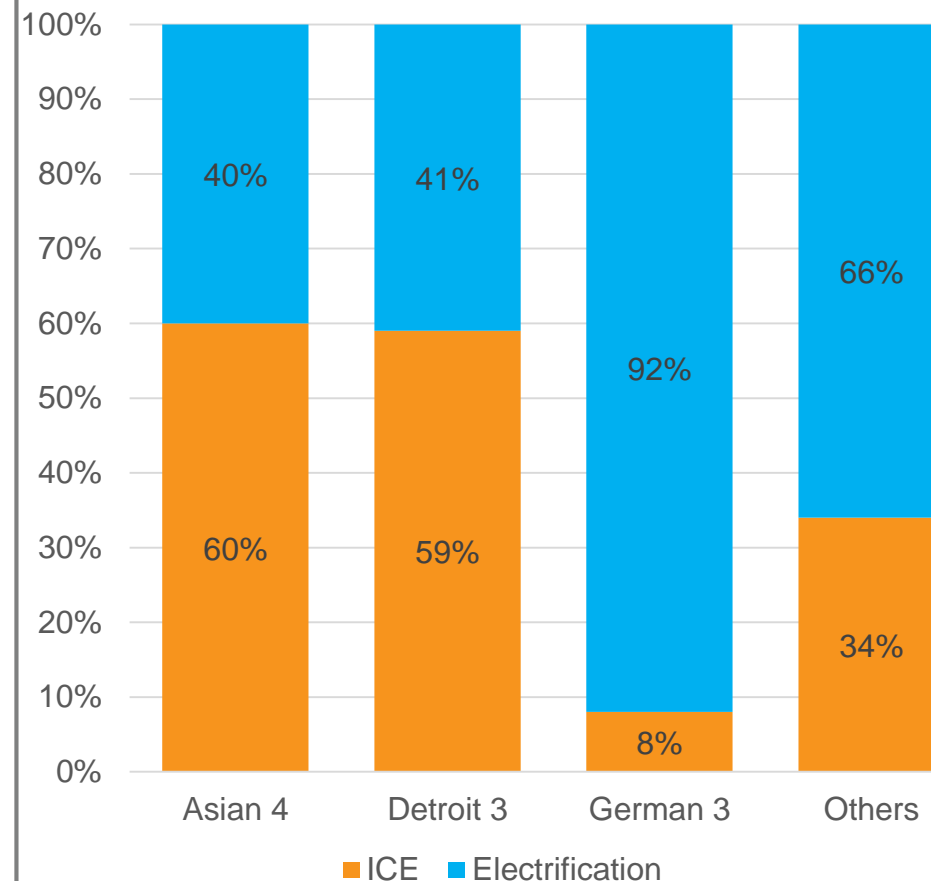
# Sistema de propulsión por Región/Cluster de Empresas

Producción 2030



Source: IHS Markit

Producción 2030

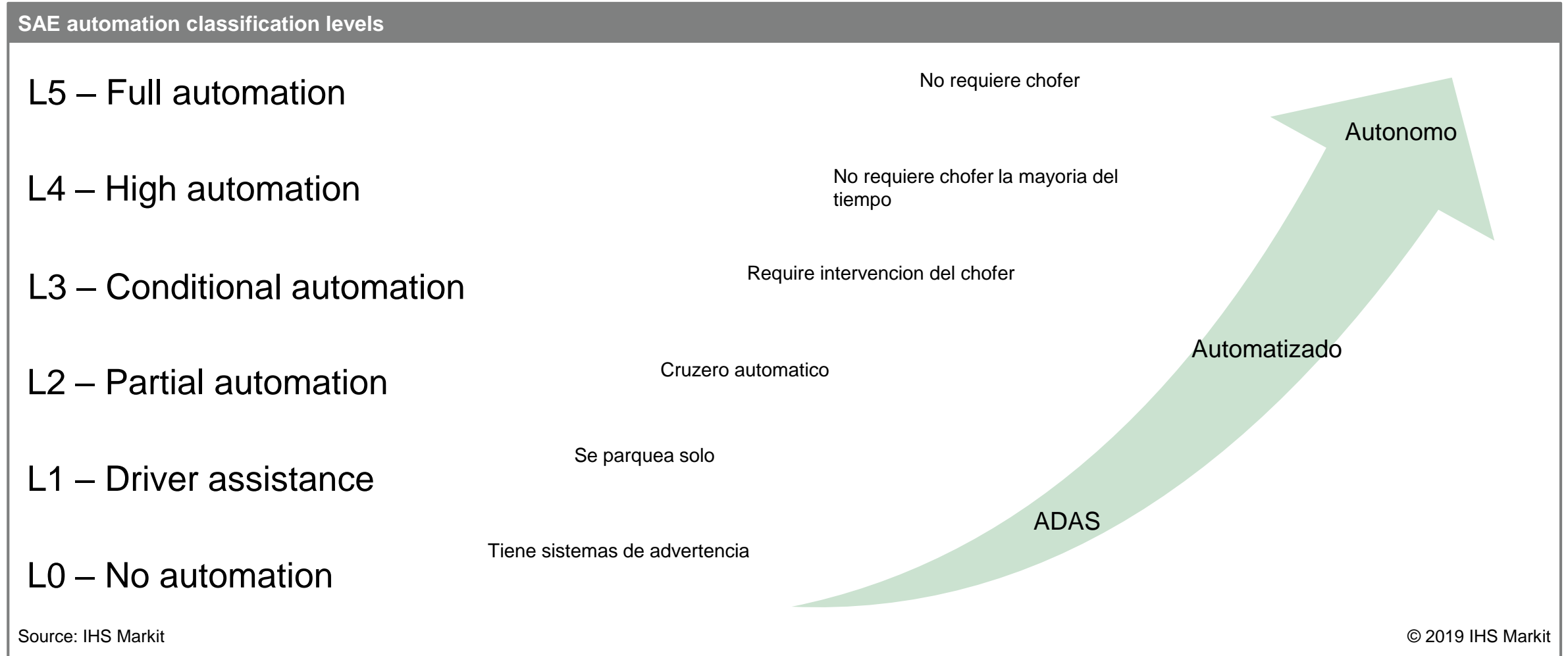


Source: IHS Markit

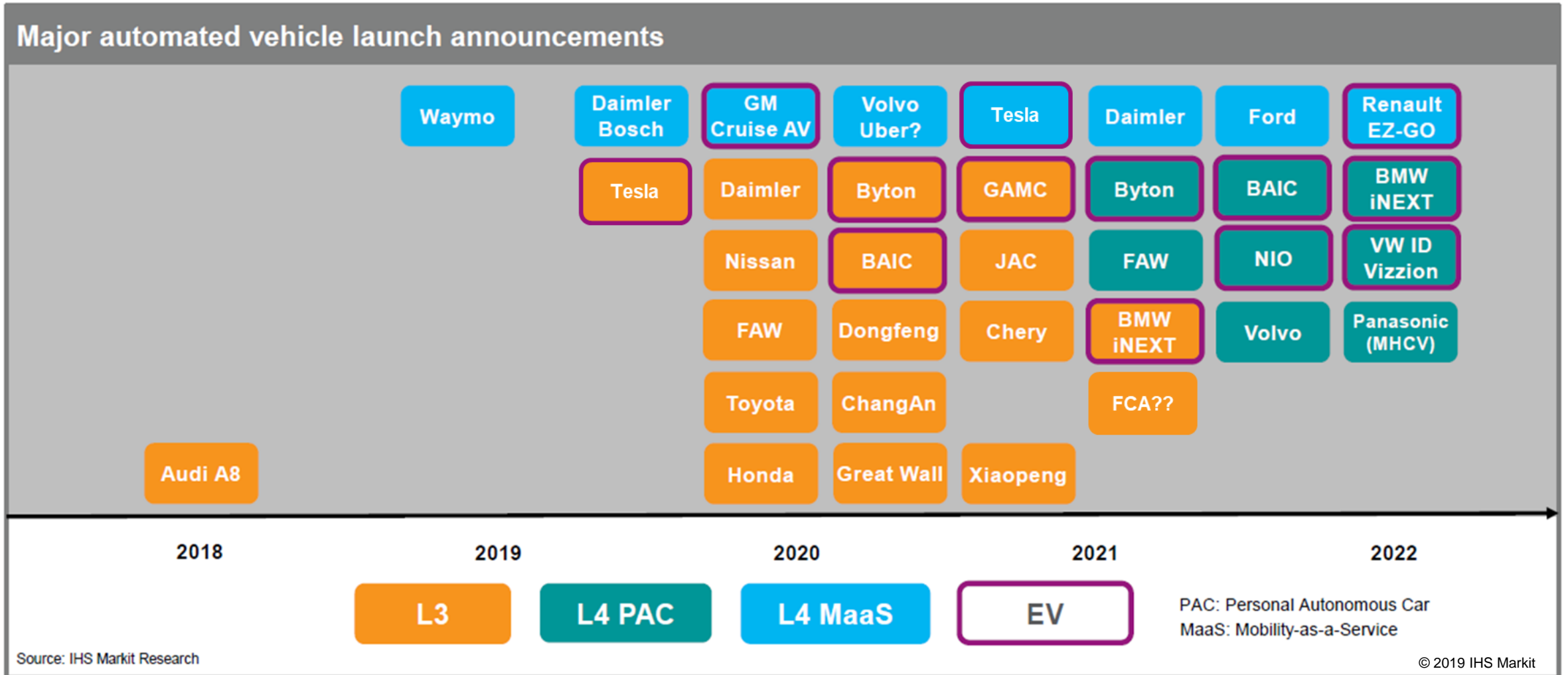
Note: Electrification is defined as hybrid vehicles such as MHEVs, FHEVs and PHEVs, electric vehicles, and hydrogen fuel cell vehicles

# Definición de Autónomos por SAE-Sociedad de Ingenieros Automotrices

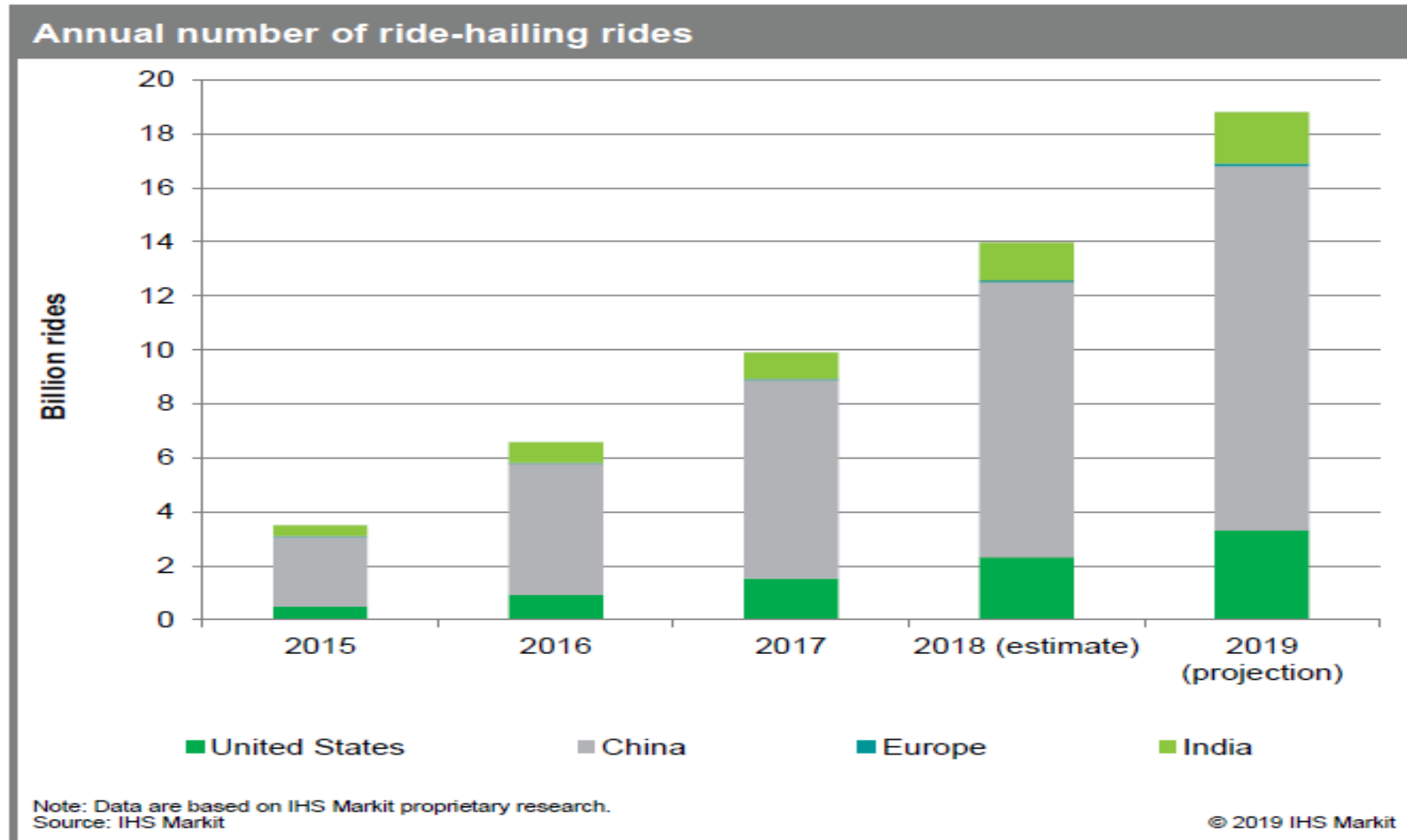
Clasificación global



# 3. Pronostico de autónomos por Empresa



# Evolución de “movilidad compartida”





## 4. Compañías nuevas vs compañías tradicionales

### Diferencias en uso de capital y recursos

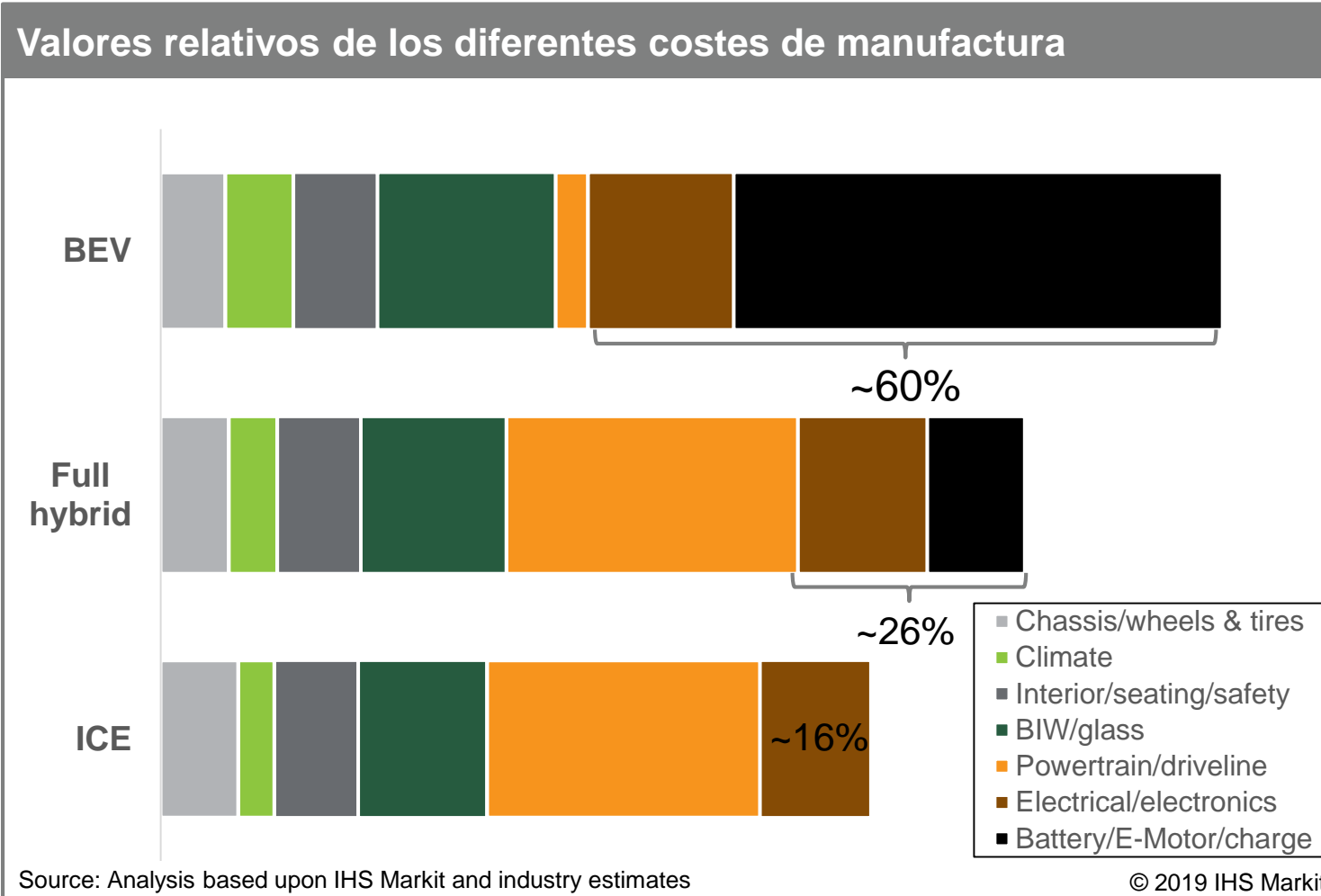
- Hay inversiones en electrificación, movilidad compartida y vehículos autónomos que permiten la formación de nuevas empresas y modelos de negocios:
  - Menor dependencia en bienes capitales (plantas)
  - Mayor libertad para formar alianzas y/o estrategias
  - Diferentes ciclos tecnológicos (5 años para negocios actual)
- Sector tradicional automotriz:
  - Presion crece para mejorar eficiencia y contener costes
  - Distribucion de capital ya asignado dado ciclos de negocios
  - Dificultad en atraer talento

### Desarrollo de nuevas compañías impacta:

- Capital, recursos y atención a nuevos modelos de negocio
- Énfasis del negocio revuelve en generar innovación
- Transición será difícil par algunos e imposible para otros

Note: Electrification is defined as hybrid vehicles such as MHEVs, FHEVs and PHEVs, electric vehicles, and hydrogen fuel cell vehicles

# 5. Valor del eco-sistema de un vehículo



**Impacto:**

- Proveedores existentes deben de adaptarse, los nuevos tienen una ventaja
- Electrificación da mayor importancia a paquetes de batería, carga, clima y ADAS
- Partes del chasis, motor y tren son alterados o eliminados
- Ritmo de transición desconocido y incertidumbre en nuevas demandas del cliente

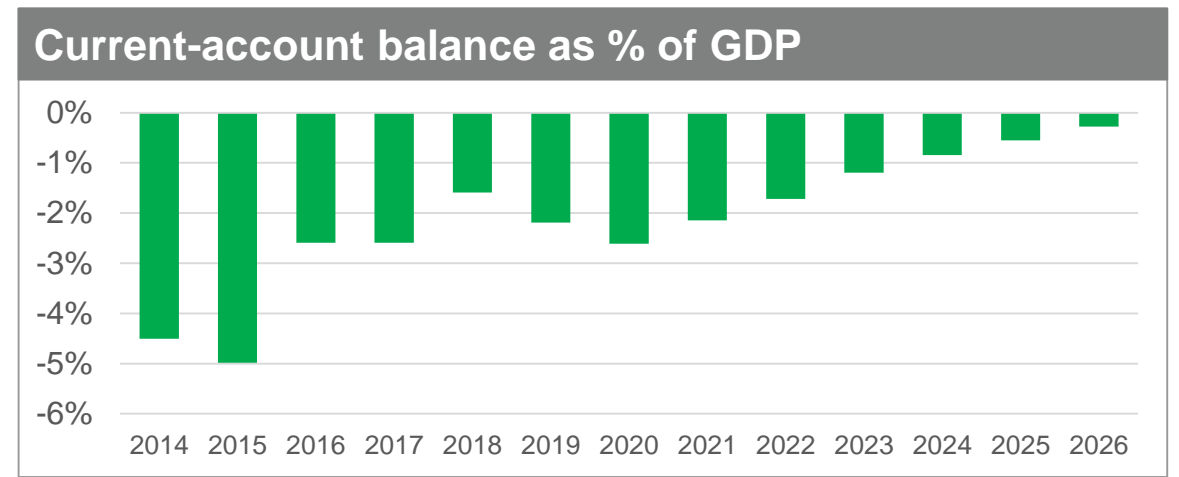
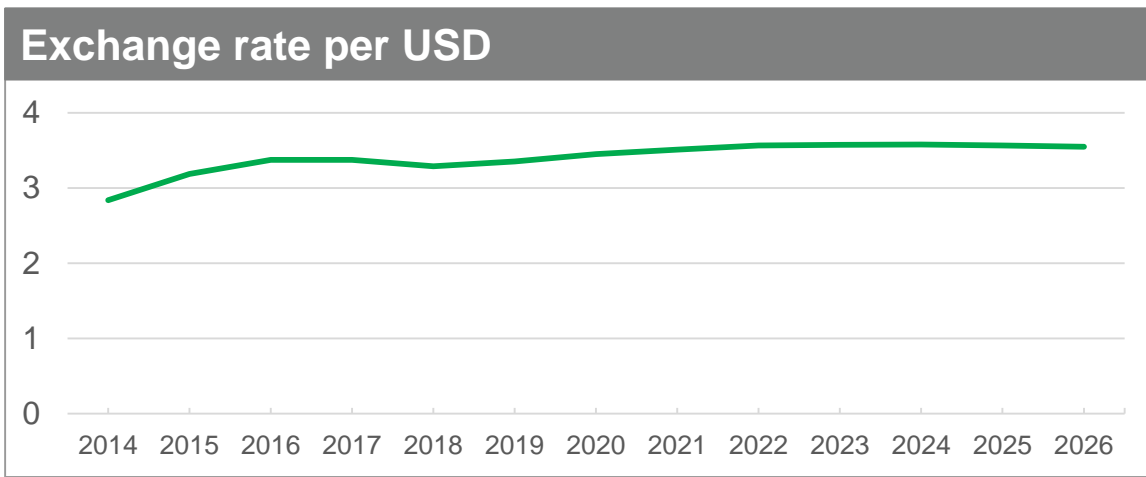
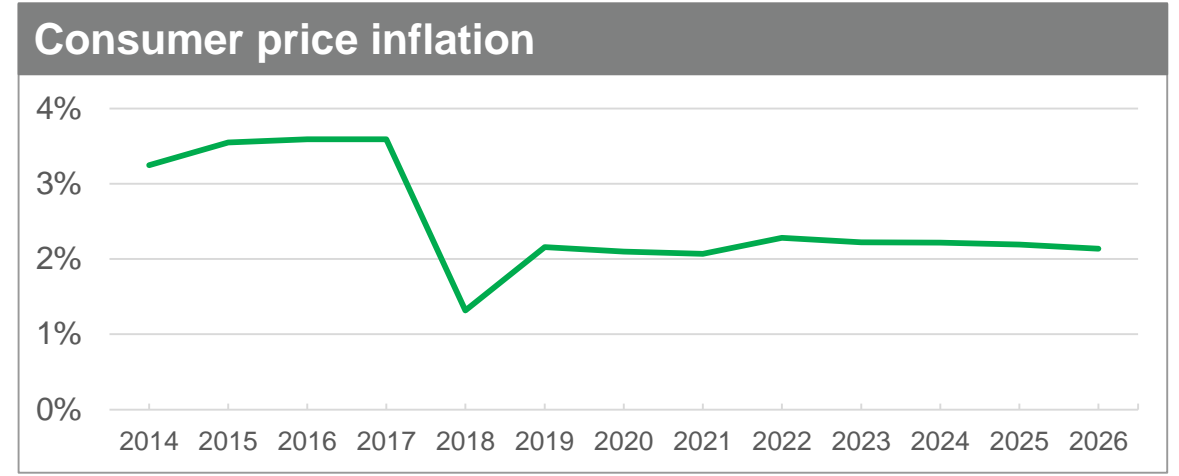
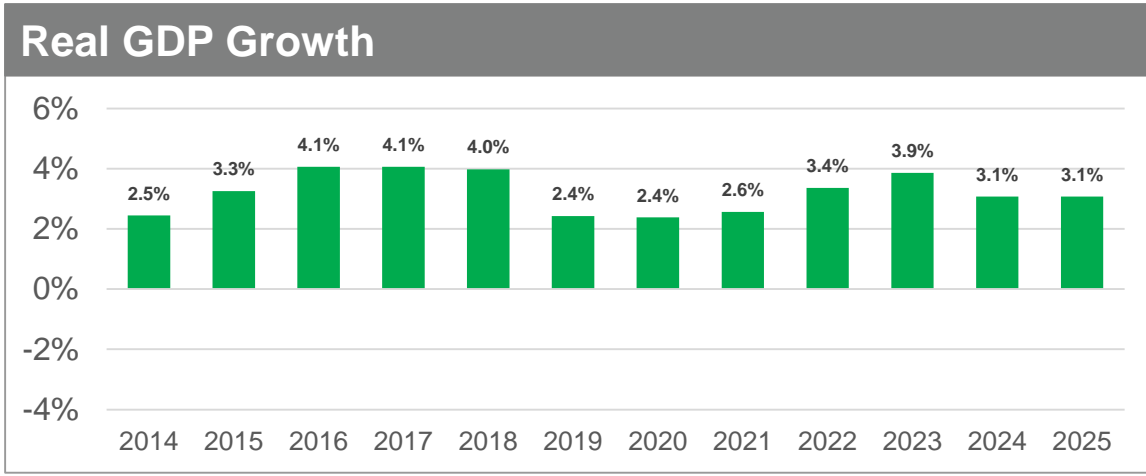
Note: Electrification is defined as hybrid vehicles such as MHEVs, FHEVs and PHEVs, electric vehicles, and hydrogen fuel cell vehicles

# Ventas de Vehículos Ligeros en América Latina

## Margen de error 2019 y perspectivas de crecimiento

Pais	CY 2017	CY 2018	P'18	CY 2019	P'19	CY 2020	P'20	CY 2019	
								Dic18	MOE '19
Argentina	860,158	786,649	-8.5%	432,506	-45.0%	335,787	-22.4%	510,604	-15.3%
Brazil	2,175,777	2,465,684	13.3%	2,659,684	7.9%	2,767,217	4.0%	2,710,500	-1.9%
Chile	371,053	420,043	13.2%	367,953	-12.4%	352,738	-4.1%	421,750	-12.8%
Colombia	237,421	249,464	5.1%	259,481	4.0%	274,389	5.7%	245,689	5.6%
Ecuador	100,727	130,336	29.4%	125,050	-4.1%	123,004	-1.6%	130,455	-4.1%
Mexico	1,532,632	1,425,404	-7.0%	1,315,042	-7.7%	1,280,559	-2.6%	1,465,987	-10.3%
<b>Peru</b>	<b>167,305</b>	<b>145,284</b>	<b>-13.2%</b>	<b>150,025</b>	<b>3.3%</b>	<b>155,104</b>	<b>3.4%</b>	<b>161,952</b>	<b>-7.4%</b>

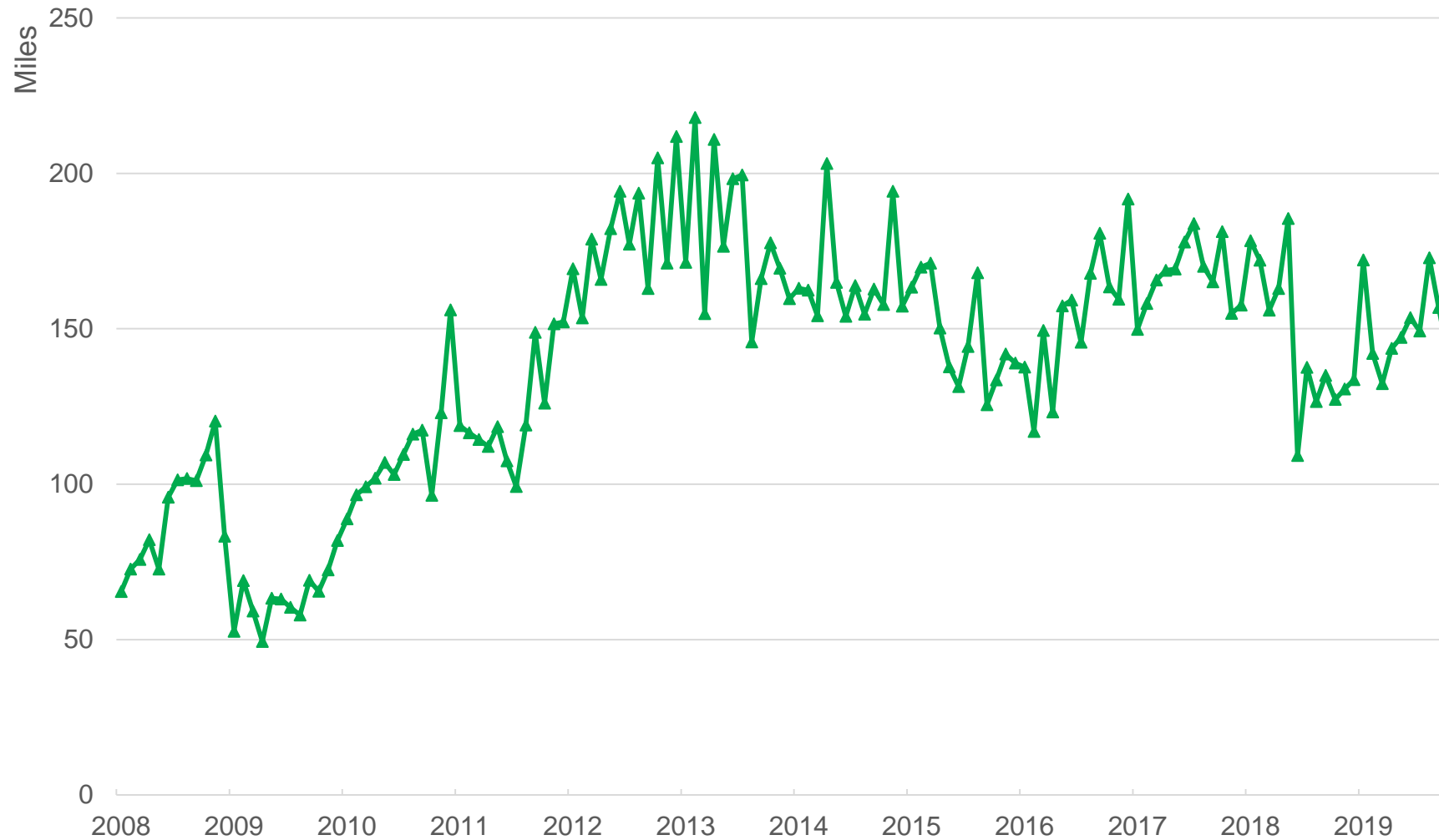
# Perspectivas económicas - Peru



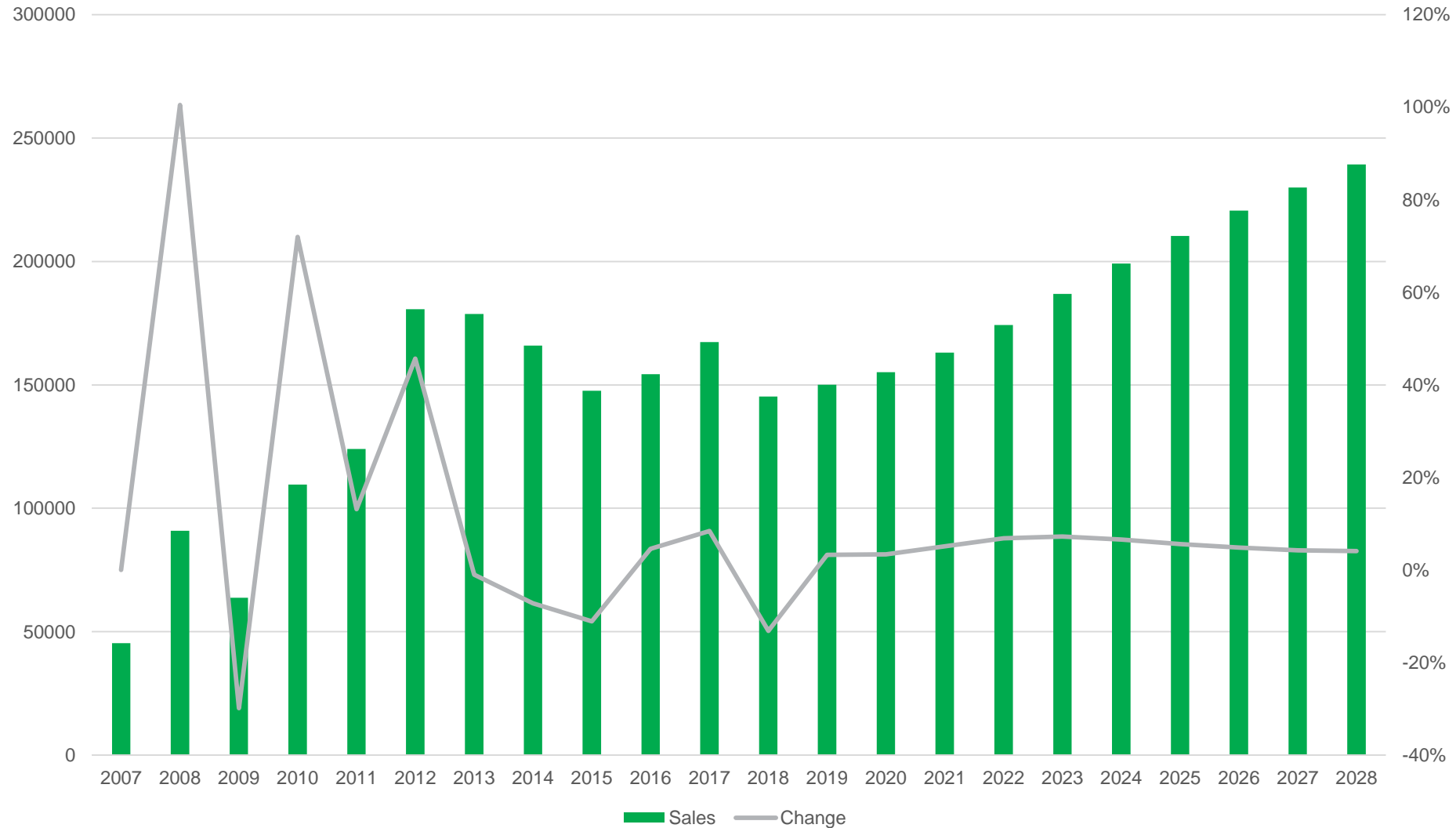
Source: IHS Markit

© 2019 IHS Markit

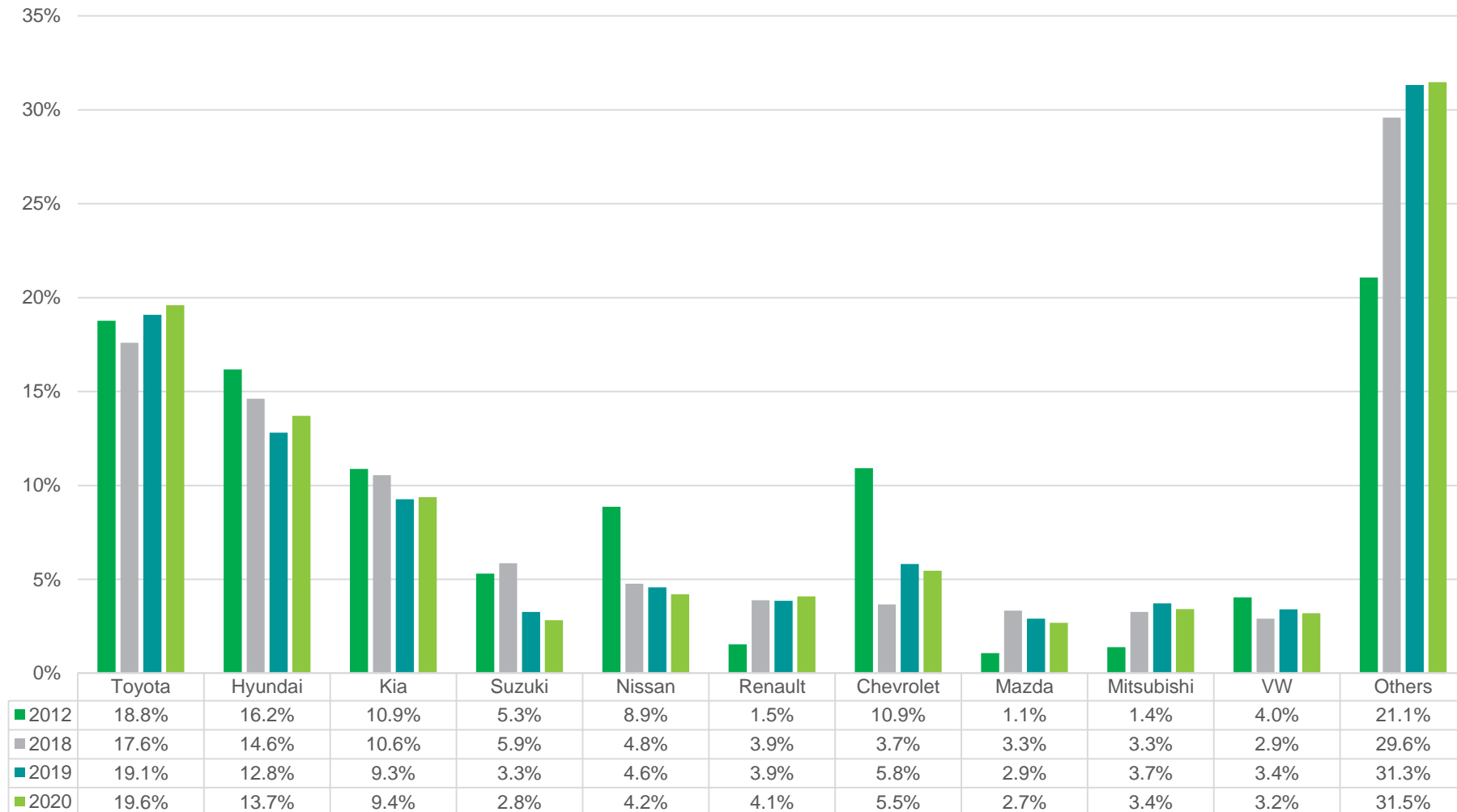
# Ventas de Vehiculos Ligeros (SAAR) - Peru



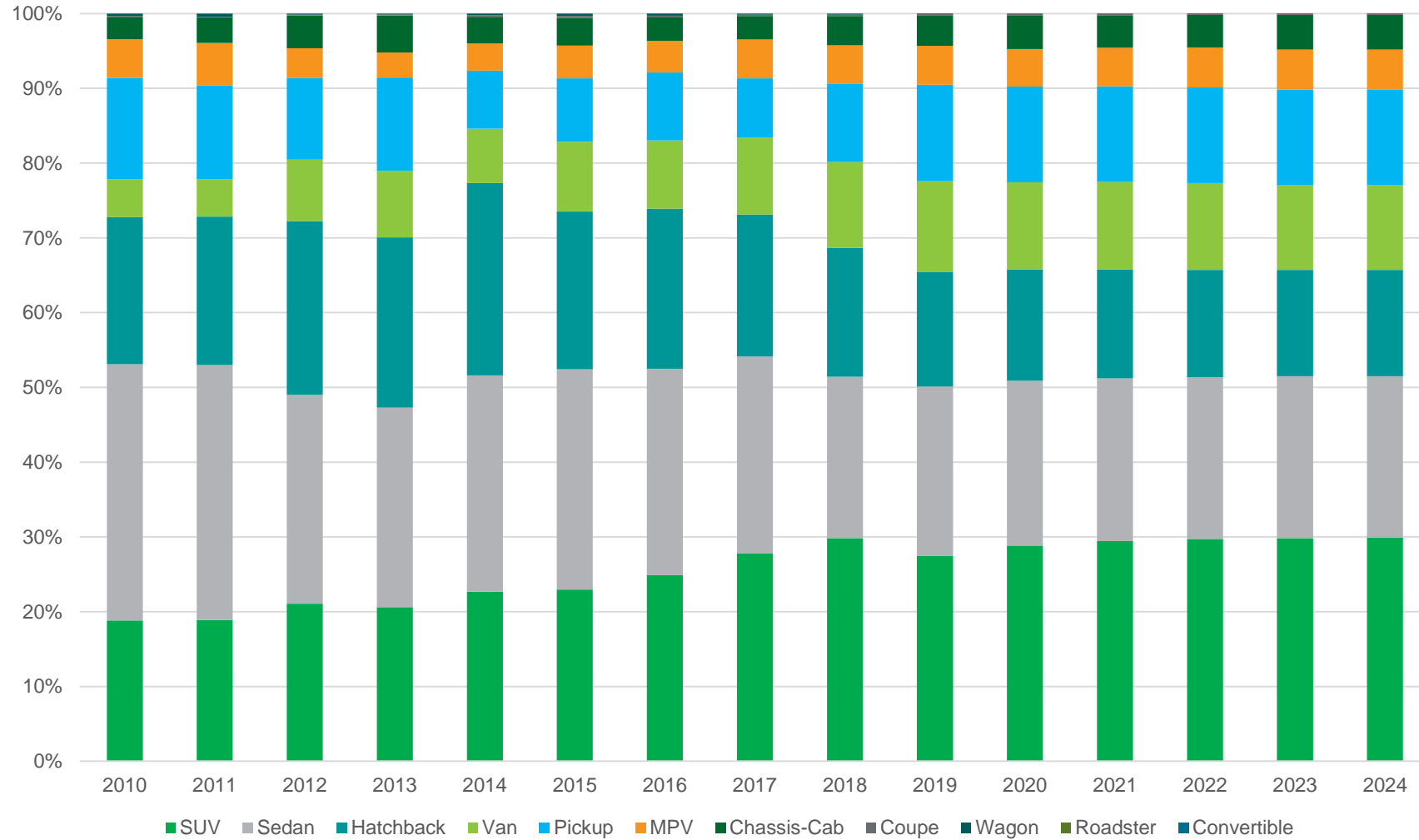
# Perú Venta Vehículos Ligeros



# Peru Top-10 Market Share

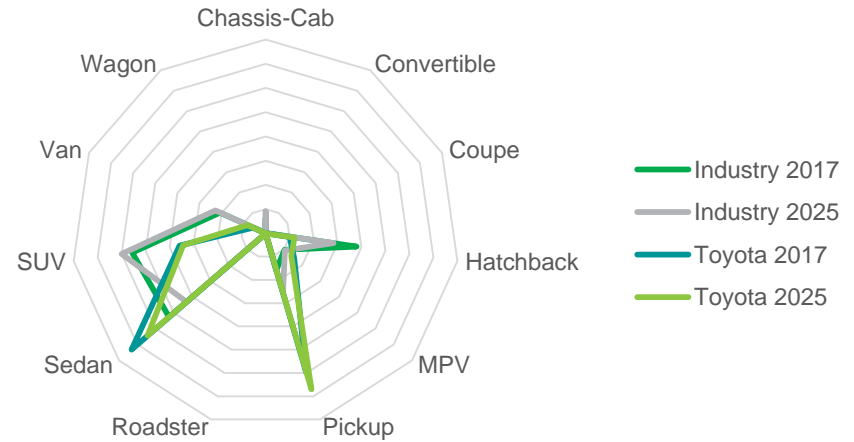
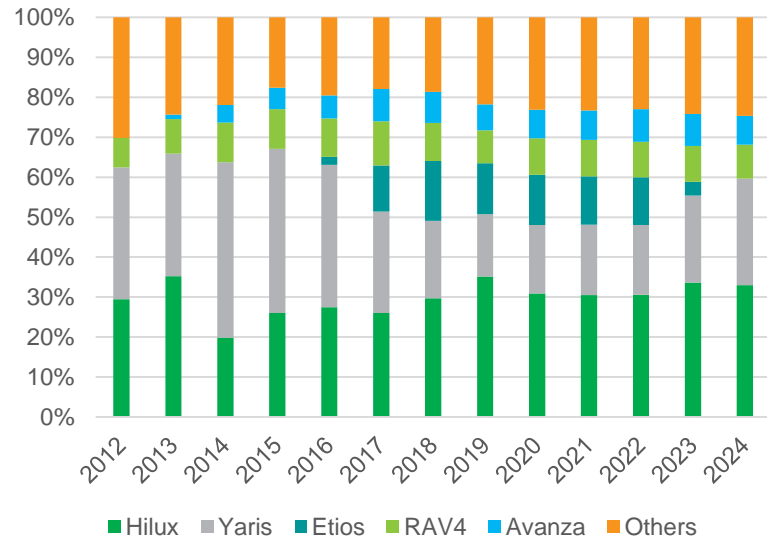
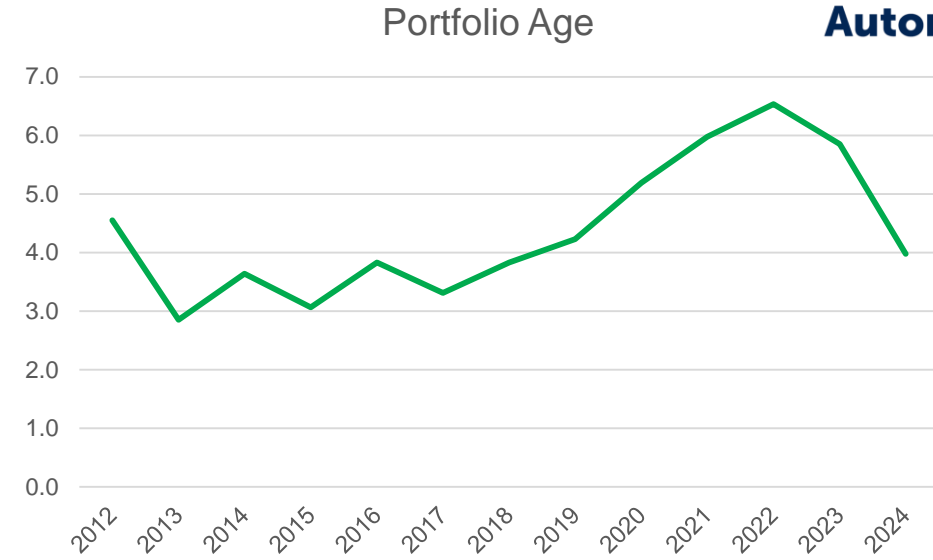
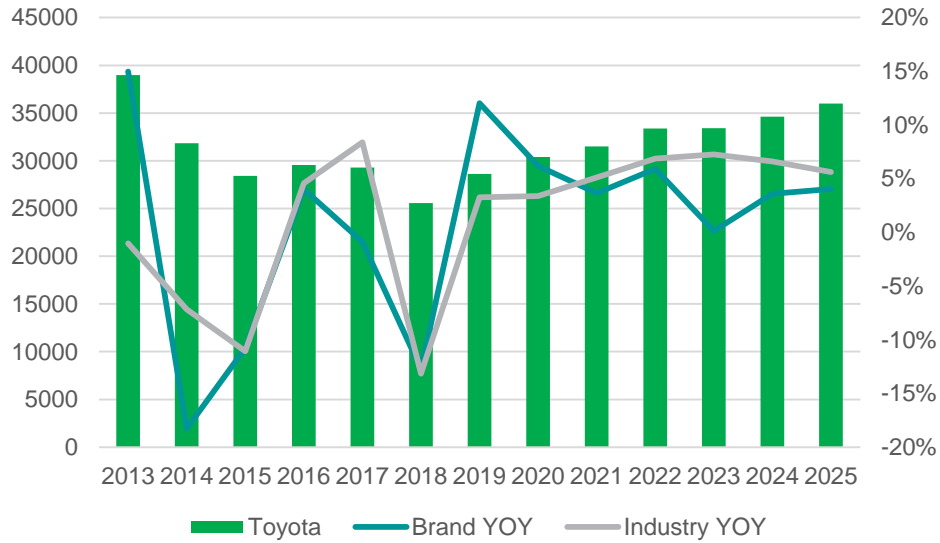


# Peru Bodytype

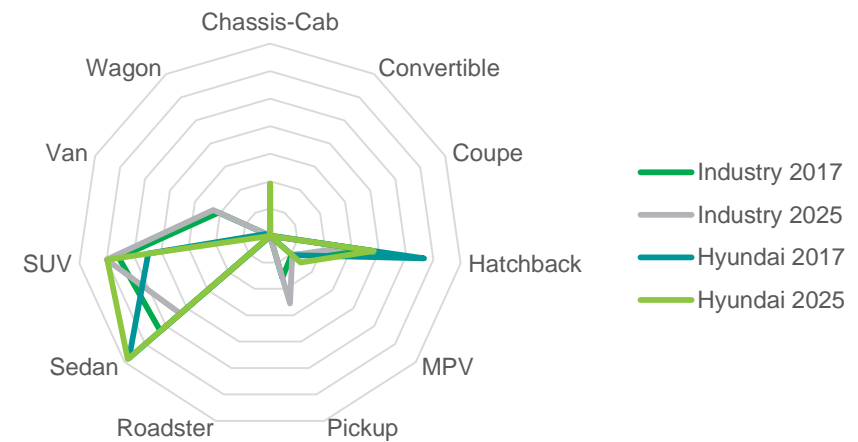
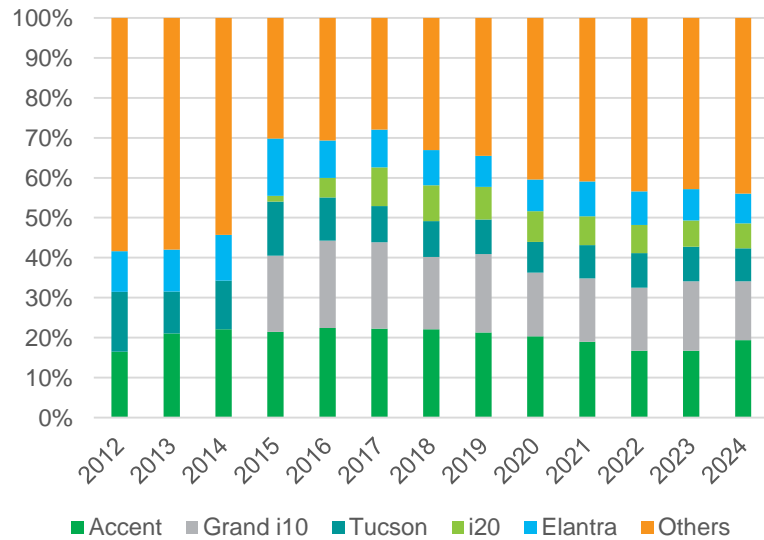
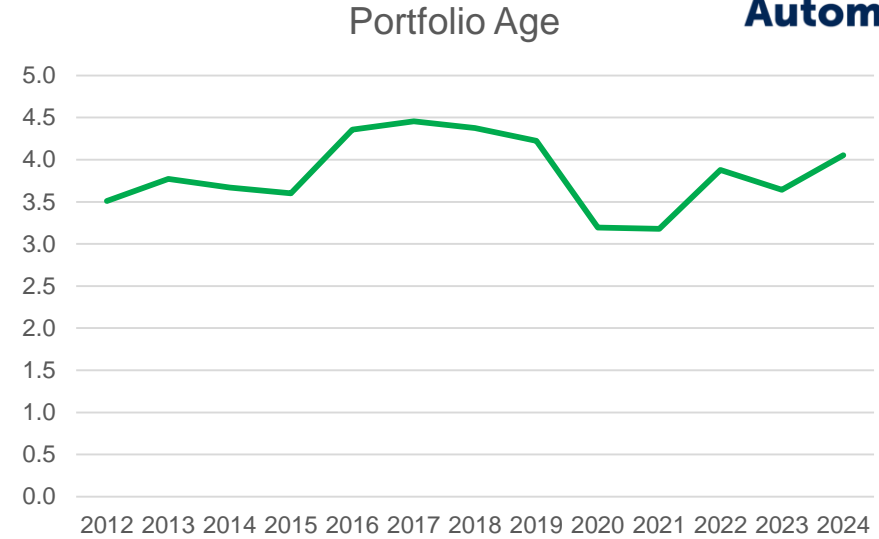
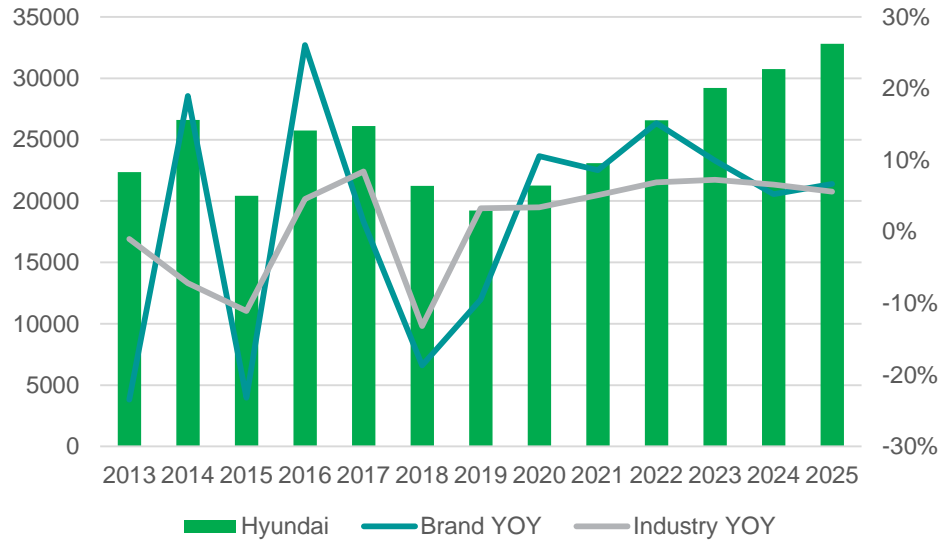




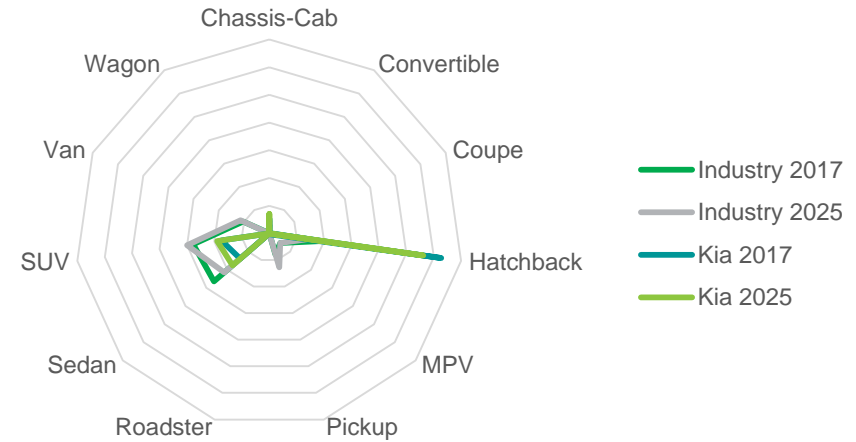
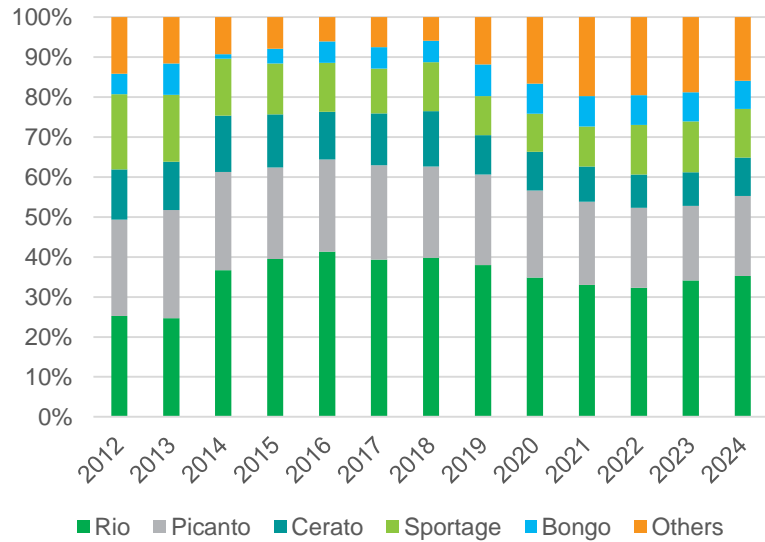
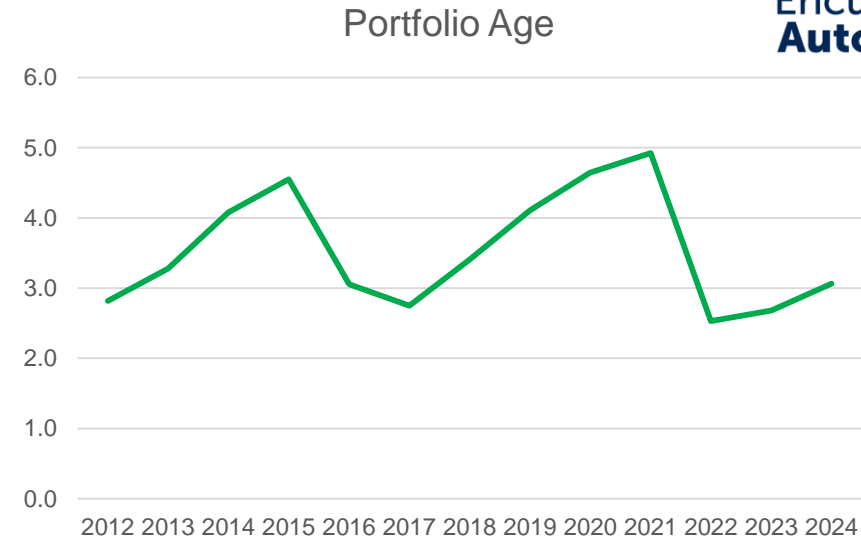
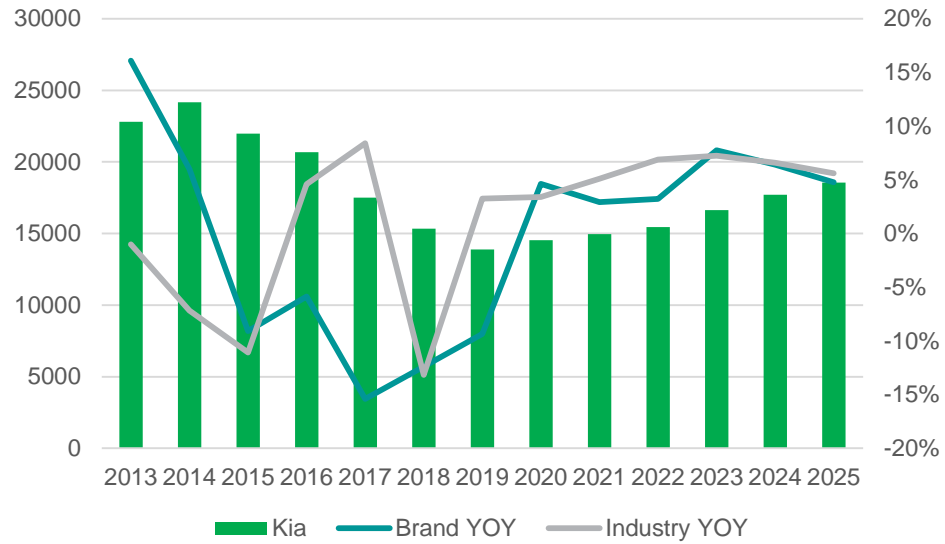
# Peru Ventas Ligeros - Toyota



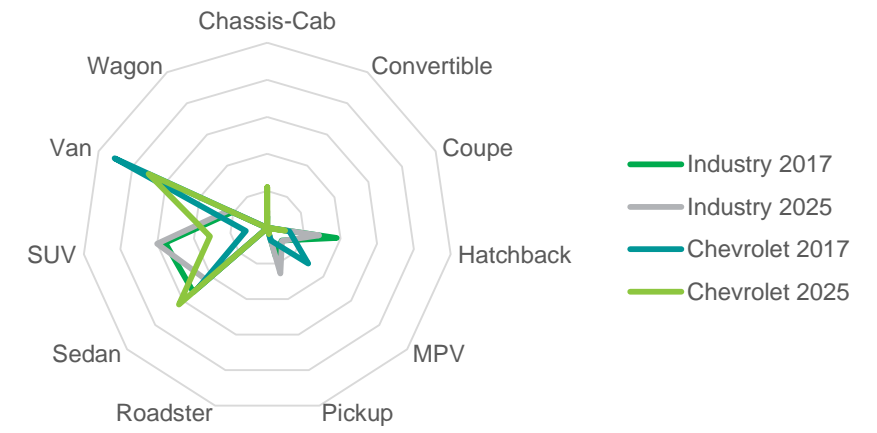
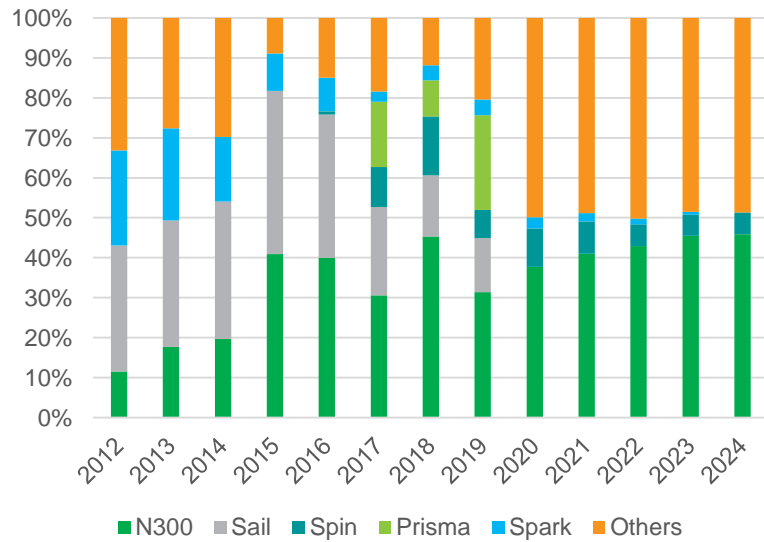
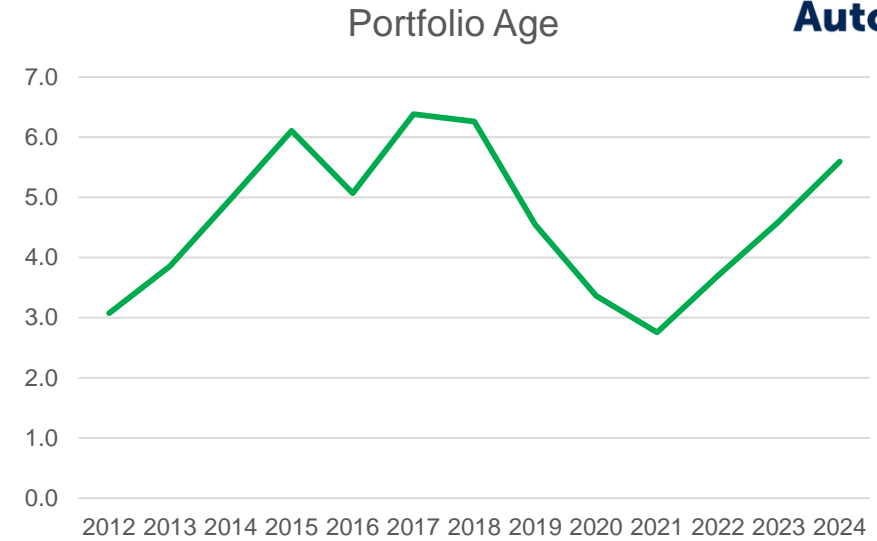
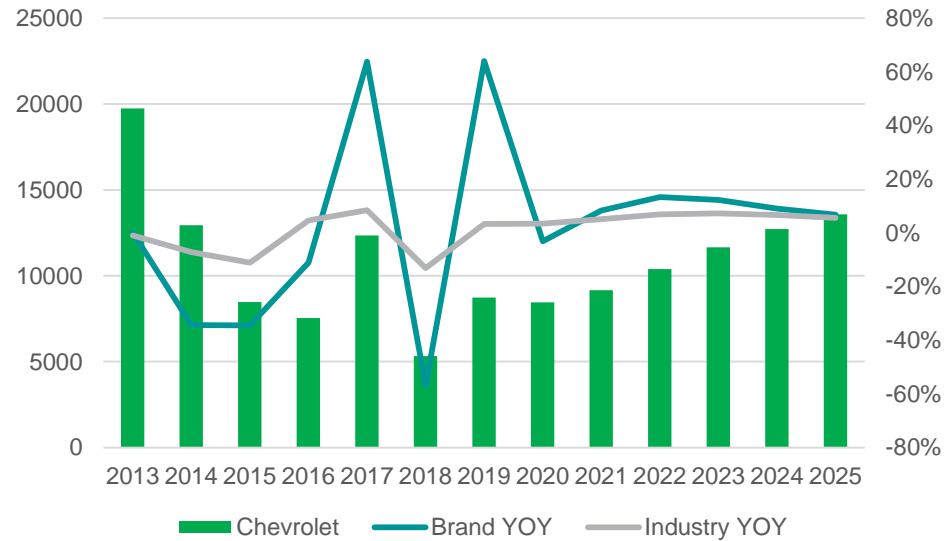
# Peru Ventas Ligeros - Hyundai



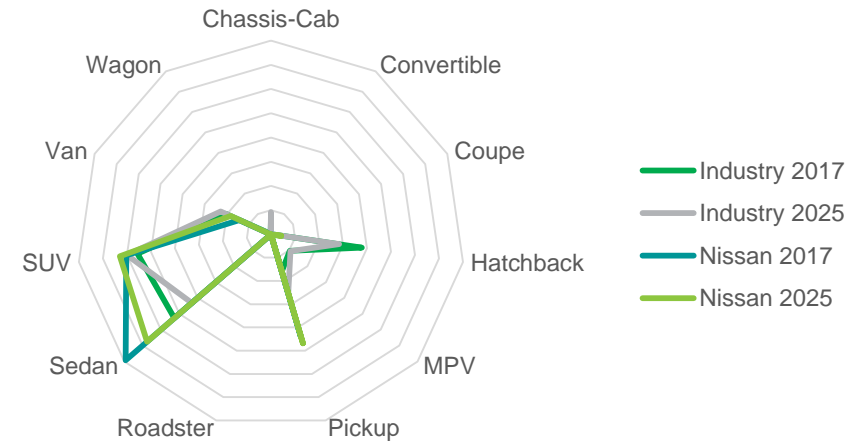
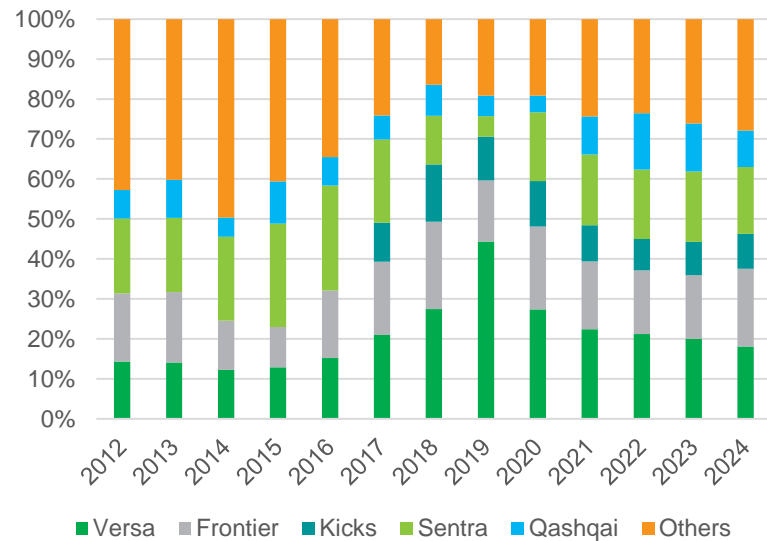
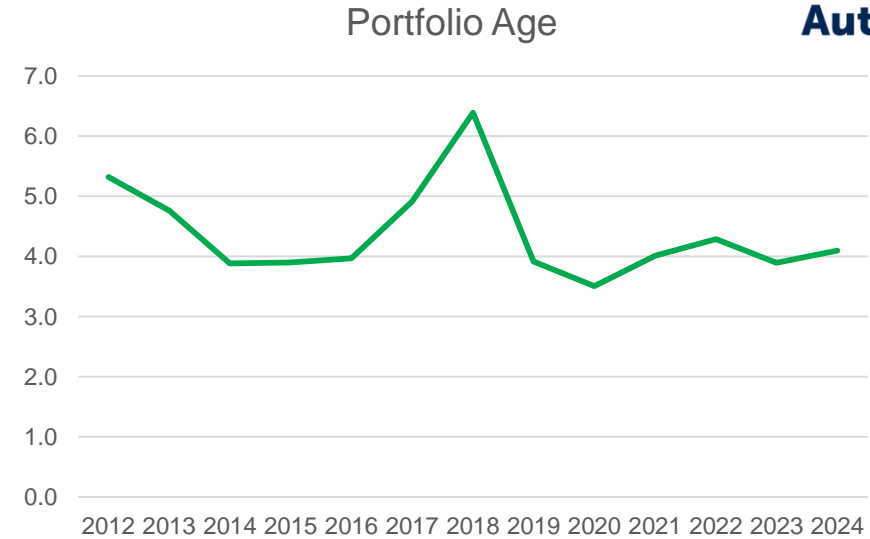
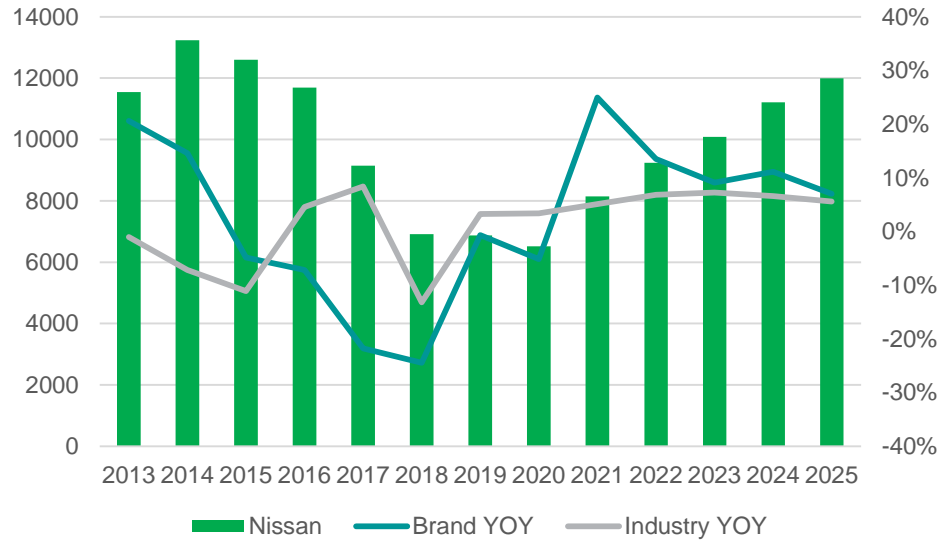
# Peru Ventas Ligeros - Kia



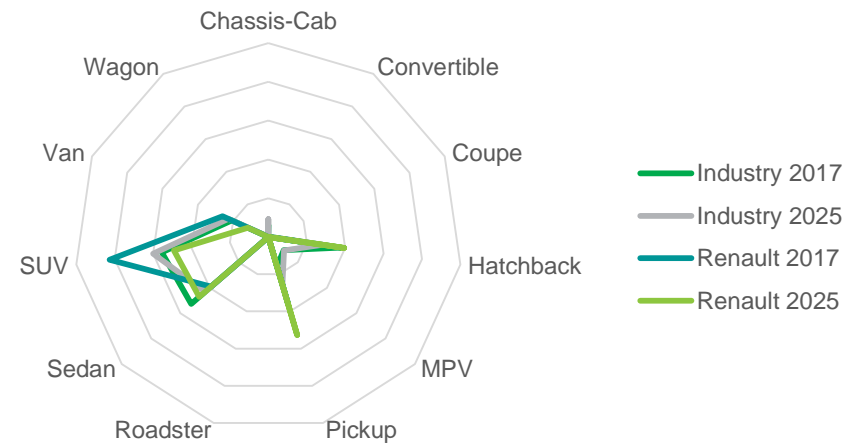
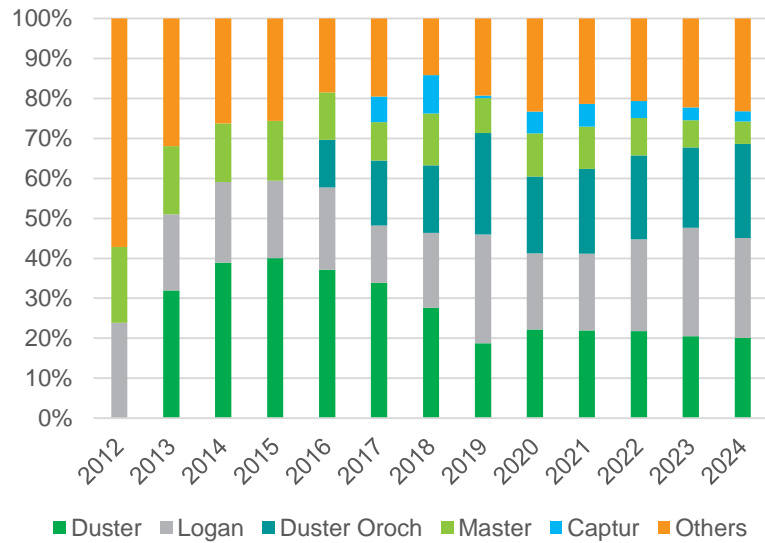
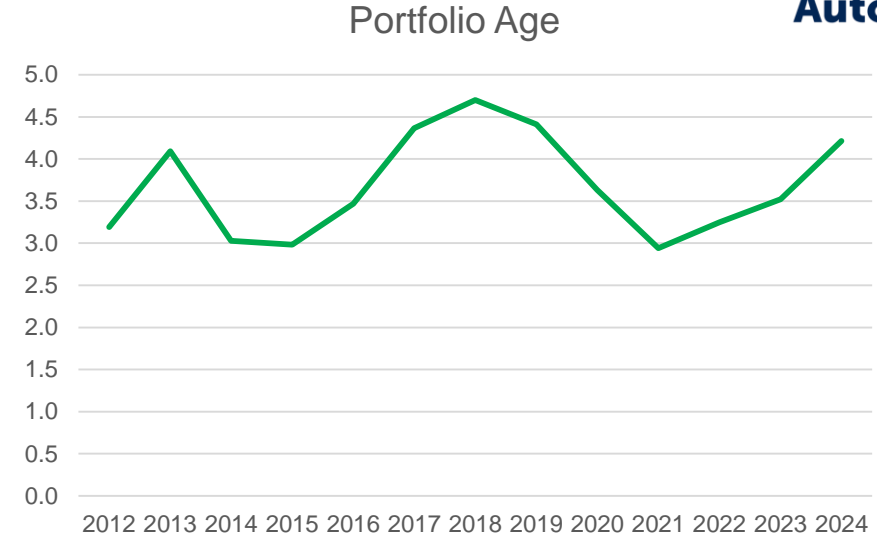
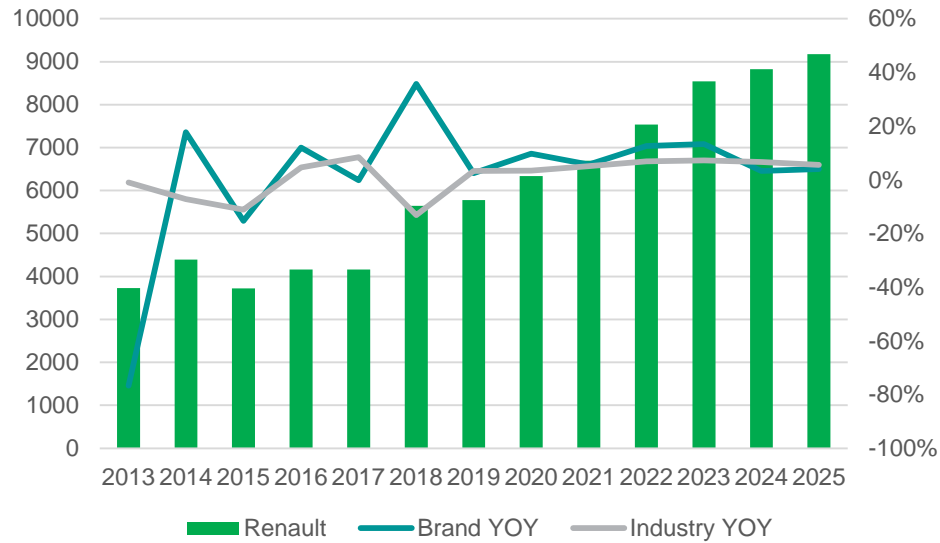
# Peru Ventas Ligeros - Chevrolet



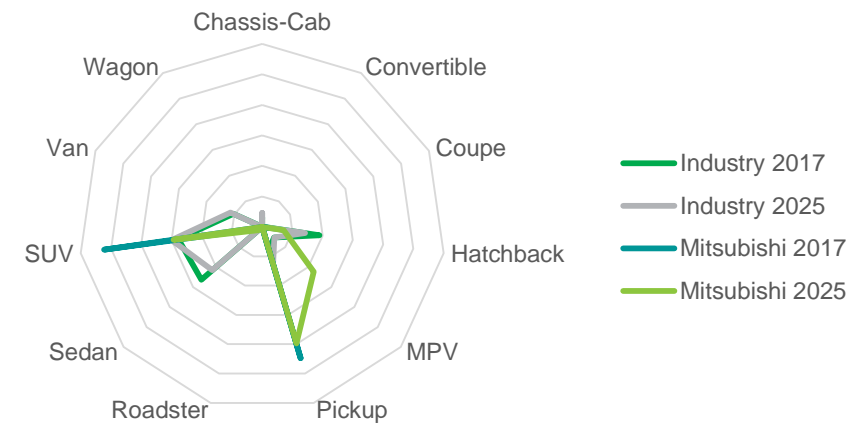
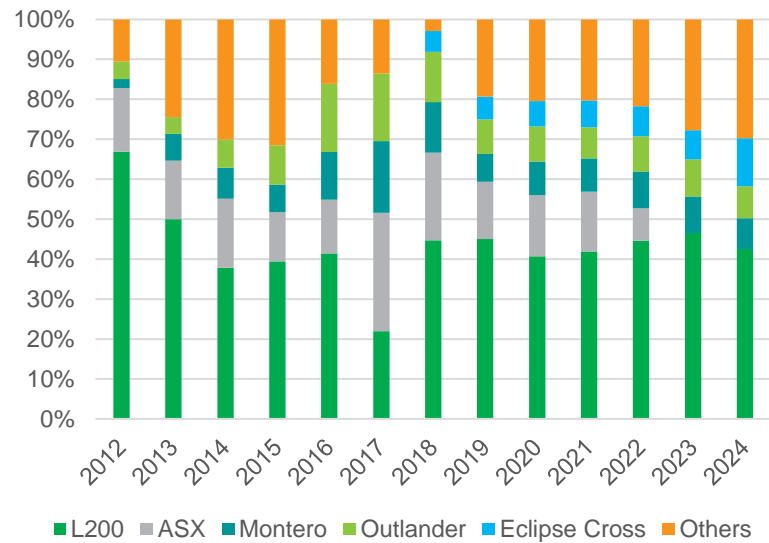
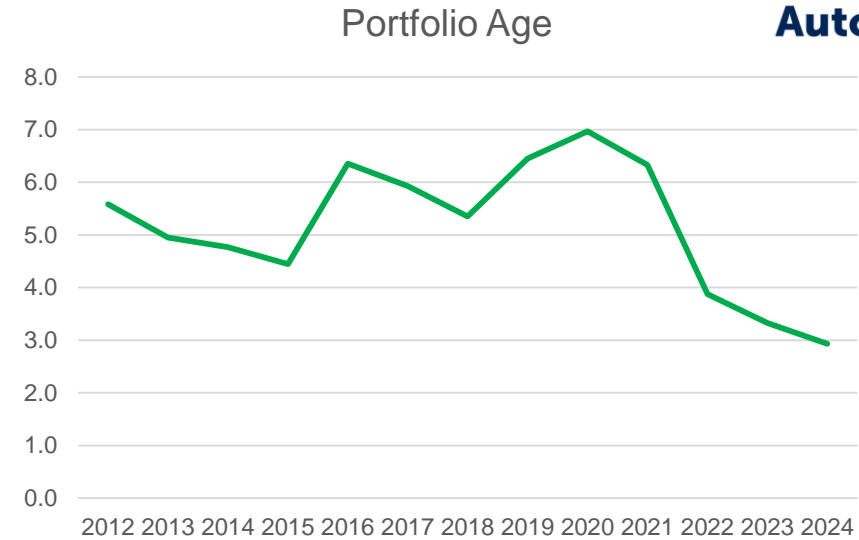
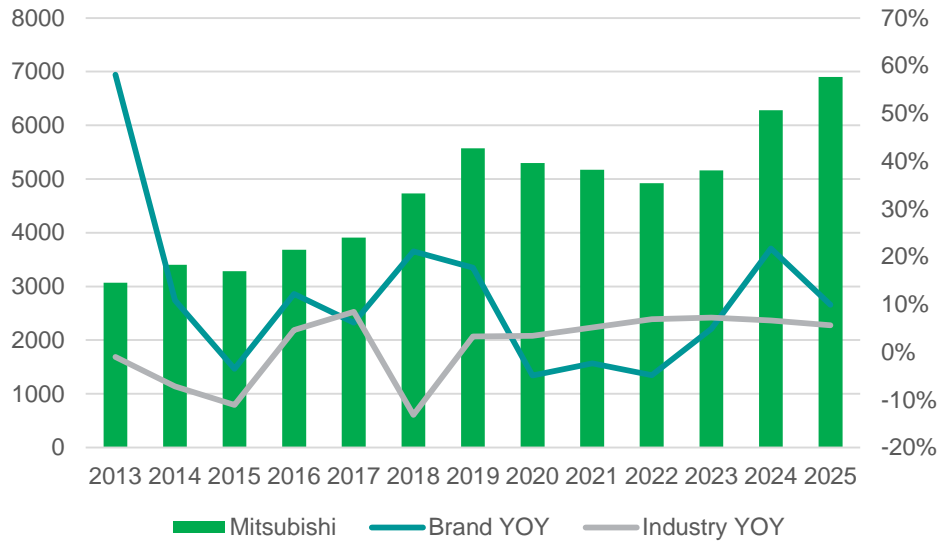
# Peru Ventas Ligeros - Nissan



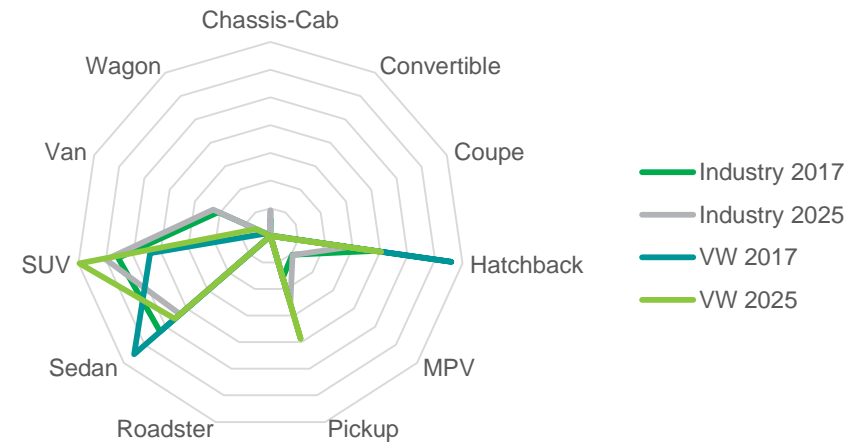
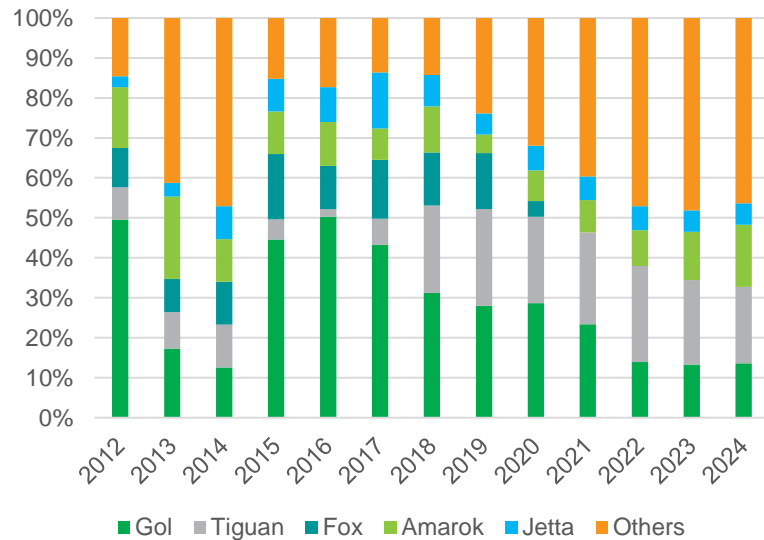
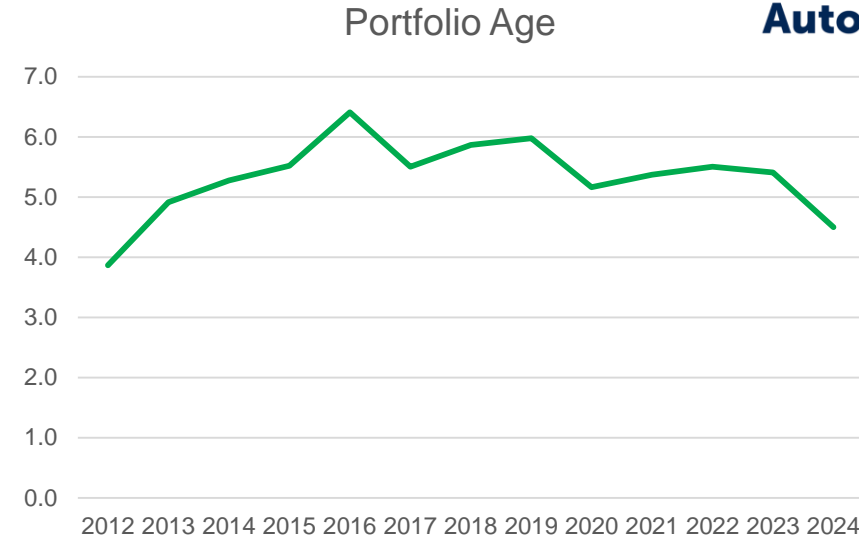
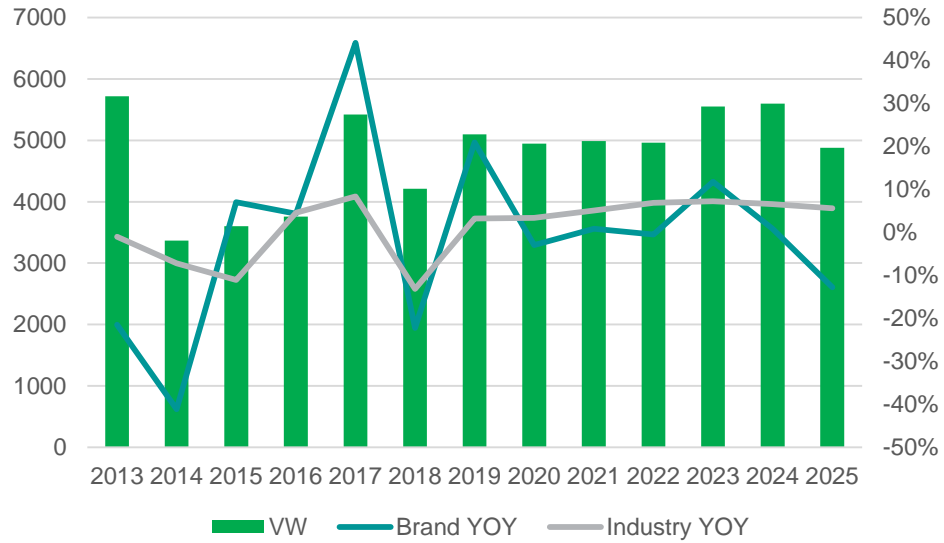
# Peru Ventas Ligeros - Renault



# Peru Ventas Ligeros - Mitsubishi



# Peru Ventas Ligeros - Volkswagen





# Thank you, Muchas Gracias Muito Obrigado!

**Guido Vildoza**, Senior Manager

+1 781 301 9037

[guido.vildoza@ihsmarkit.com](mailto:guido.vildoza@ihsmarkit.com)

**Christopher Hopson**, Manager

+1 781 301 9107

[chris.hopson@ihsmarkit.com](mailto:chris.hopson@ihsmarkit.com)

**Roberto Barros**, Senior Analyst

+55 19 3578 1221

[roberto.barros@ihsmarkit.com](mailto:roberto.barros@ihsmarkit.com)

**João Rebouças**, Market Analyst

+55 19 3578 1219

[joao.reboucas@ihsmarkit.com](mailto:joao.reboucas@ihsmarkit.com)

**Nicholas Hess**, Market Analyst

+1 248 728 6985

[nicholas.hess@ihsmarkit.com](mailto:nicholas.hess@ihsmarkit.com)

## IHS Markit Customer Care

[CustomerCare@ihsmarkit.com](mailto:CustomerCare@ihsmarkit.com)

Americas: +1 800 IHS CARE (+1 800 447 2273)

Europe, Middle East, and Africa: +44 (0) 1344 328 300

Asia and the Pacific Rim: +604 291 3600

### Disclaimer

The information contained in this presentation is confidential. Any unauthorized use, disclosure, reproduction, or dissemination, in full or in part, in any media or by any means, without the prior written permission of IHS Markit Ltd. or any of its affiliates ("IHS Markit") is strictly prohibited. IHS Markit owns all IHS Markit logos and trade names contained in this presentation that are subject to license. Opinions, statements, estimates, and projections in this presentation (including other media) are solely those of the individual author(s) at the time of writing and do not necessarily reflect the opinions of IHS Markit. Neither IHS Markit nor the author(s) has any obligation to update this presentation in the event that any content, opinion, statement, estimate, or projection (collectively, "information") changes or subsequently becomes inaccurate. IHS Markit makes no warranty, expressed or implied, as to the accuracy, completeness, or timeliness of any information in this presentation, and shall not in any way be liable to any recipient for any inaccuracies or omissions. Without limiting the foregoing, IHS Markit shall have no liability whatsoever to any recipient, whether in contract, in tort (including negligence), under warranty, under statute or otherwise, in respect of any loss or damage suffered by any recipient as a result of or in connection with any information provided, or any course of action determined by it or any third party, whether or not based on any information provided. The inclusion of a link to an external website by IHS Markit should not be understood to be an endorsement of that website or the site's owners (or their products/services). IHS Markit is not responsible for either the content or output of external websites. Copyright © 2019, IHS Markit®. All rights reserved and all intellectual property rights are retained by IHS Markit.