Industria Nacional de Autopartes, A.C.

International Associations of the Automotive Sector

May 2021

SINDIPEÇAS ABIPEÇAS

Relatório Pesquisa Conjuntural

Principais resultados em março

- Após estabilidade em fevereiro, provocada, em parte, pelo menor número de dias úteis em operação (19 dias contra 20 dias em janeiro), o **faturamento líquido nominal das autopeças** recobrou ânimo em março, aumentando 13,8% em relação ao mês anterior. É importante ressaltar que os 23 dias úteis em março tiveram impacto para o resultado em destaque, embora o ritmo de crescimento tenha retomado o que fora observado em janeiro.
- No **confronto interanual** (mar/21 x mar/20), o crescimento alcançou quase 60%, fato esse considerando a fraca base de comparação de 2020, por conta da escalada da pandemia do covid-19 no Brasil. Entendemos que nos próximos dois meses haverá altas expressivas à registrada neste mês por causa de efeito similar.
- Depois de cravar expressivo aumento no período recente, a **utilização de capacidade** recuou 10 pontos percentuais, passando de 77% em fevereiro para 67% em março. A paralisação das montadoras na última semana de março, fatores sazonais e as dificuldades para aquisição de insumos e matérias-primas são alguns dos fatores que permitem entender esse recuo.
- Em março, a criação de empregos no setor registrou pequena variação de 0,1% em comparação ao mês imediatamente anterior e de 1,6% na base interanual. Vale notar que nas últimas oito edições altas mensais.

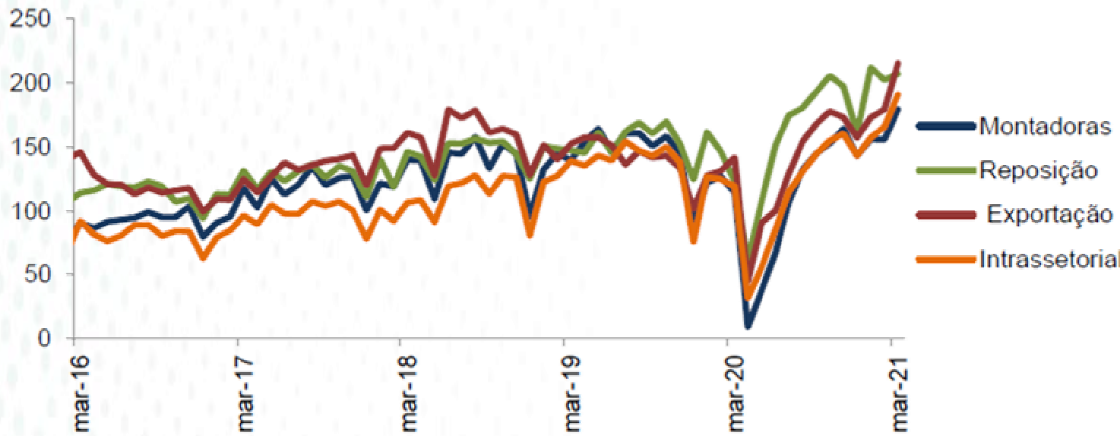
I – Faturamento

[Tabela 1] Resumo do Desempenho

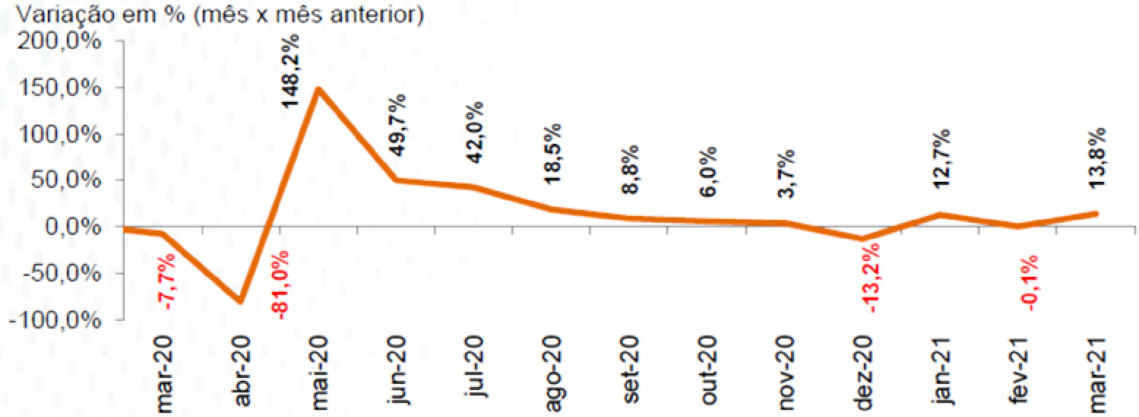
Discriminação	Variação			
	Mar 21/ Fev 21	Mar 21/ Mar 20	Acum 21/ Acum 20	Variação acumulada em 12 meses
Faturamento líquido [1] nominal consolidado (%)	**13,79**	**57,63**	**37,90**	**-6,89**
Faturamento líquido nominal: vendas para as montadoras (%)	15,00	56,85	35,29	-14,34
Faturamento líquido nominal: vendas para a reposição (%)	2,32	68,02	44,14	12,72
Faturamento líquido nominal: exportação em reais (%)	20,10	52,02	41,82	5,62
Faturamento líquido nominal: exportação em dólares (%)	15,21	31,49	15,13	-20,21
Faturamento líquido nominal: vendas intrassetoriais (%)	15,17	60,11	38,82	-3,84
Emprego nacional (%)	**-0,07**	**-1,60**	**-2,15**	**-7,46**
Capacidade ociosa [2] (p.p.)	**9,21**	**2,03**	**-3,61**	**6,40**

Fonte: Pesquisa Conjuntural Mensal do Sindipeças
Notas: * Os valores podem sofrer alterações devido à ajustes realizados mensalmente.
[1]Faturamento líquido nominal: descontando todos os impostos.
[2]Cálculo da comparação anual feita através da média do ano corrente x média do ano anterior

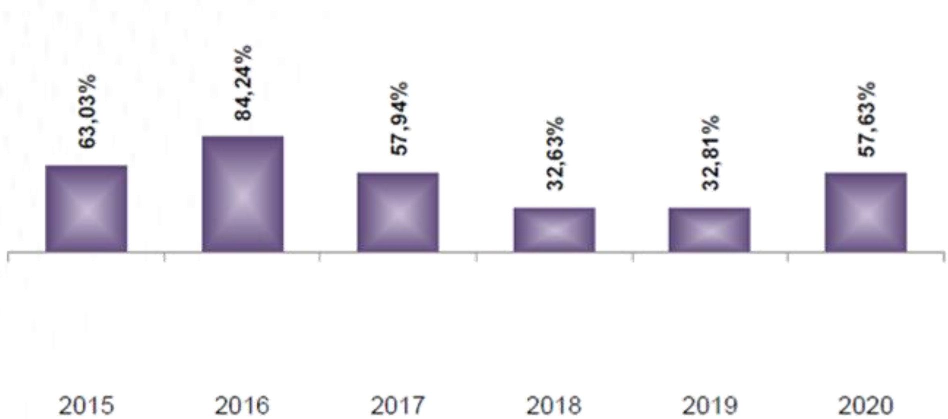
Source: Sindipecas



[Gráfico 2] Faturamento líquido nominal consolidado
Variação em % (mês x mês anterior)

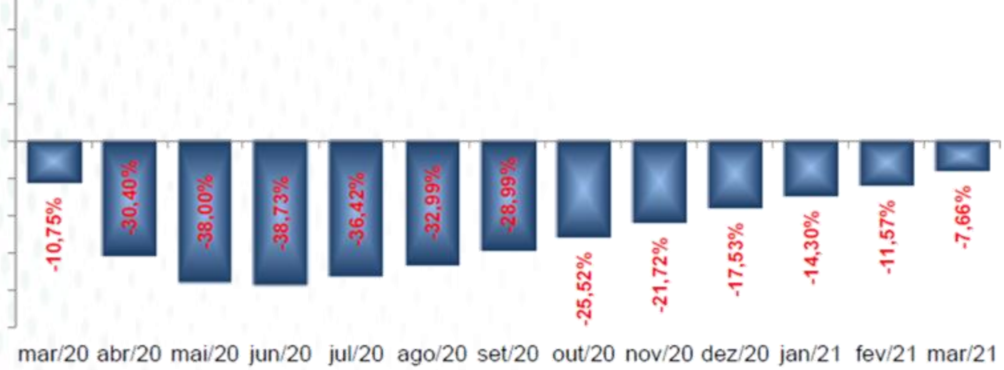


[Gráfico 3] Faturamento líquido nominal consolidado
Variação em % de **março/2021** x **março** de anos anteriores)

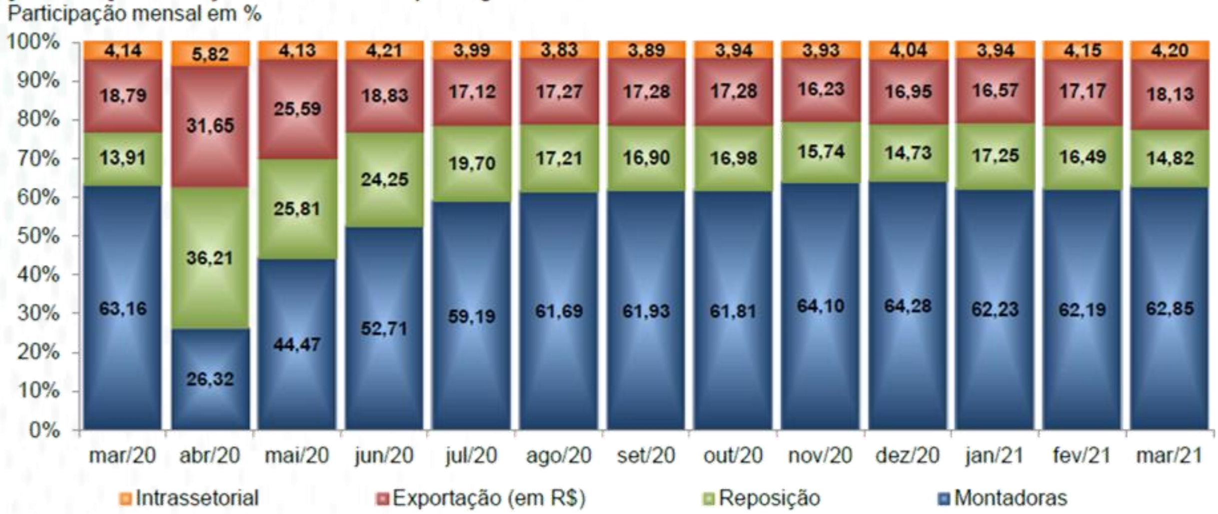


Source: Sindipecas

[Gráfico 4] Faturamento líquido nominal consolidado
Variação em % (acumulado do ano x mesmo período do ano anterior)

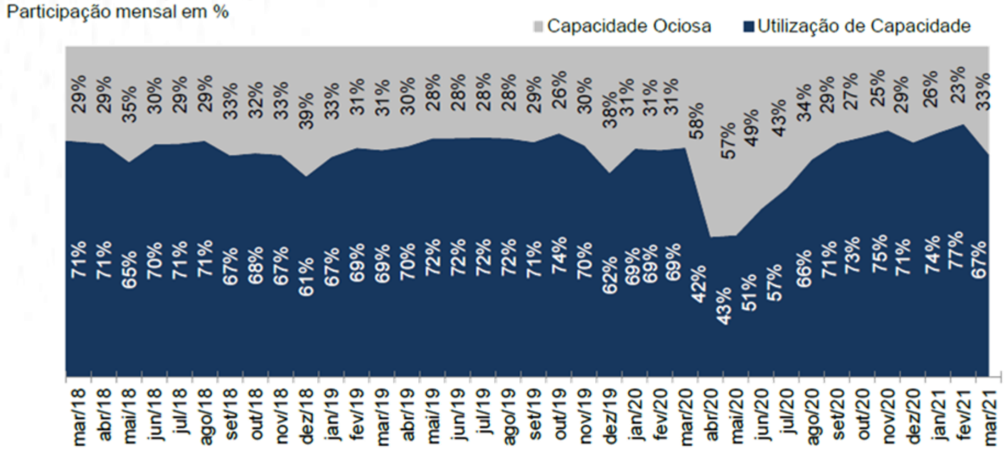


[Gráfico 5] Distribuição do faturamento por segmento
Participação mensal em %



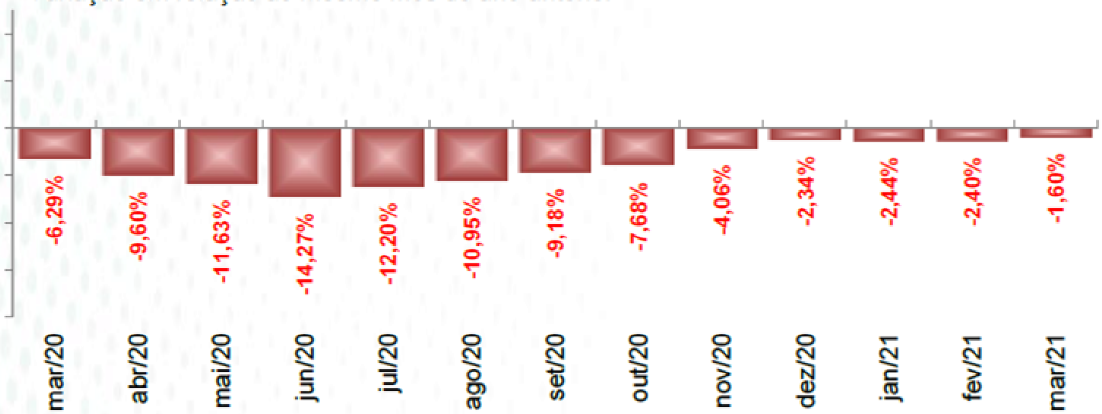
II – Capacidade Instalada e empregos no setor

[Gráfico 6] Utilização da capacidade instalada
Participação mensal em %

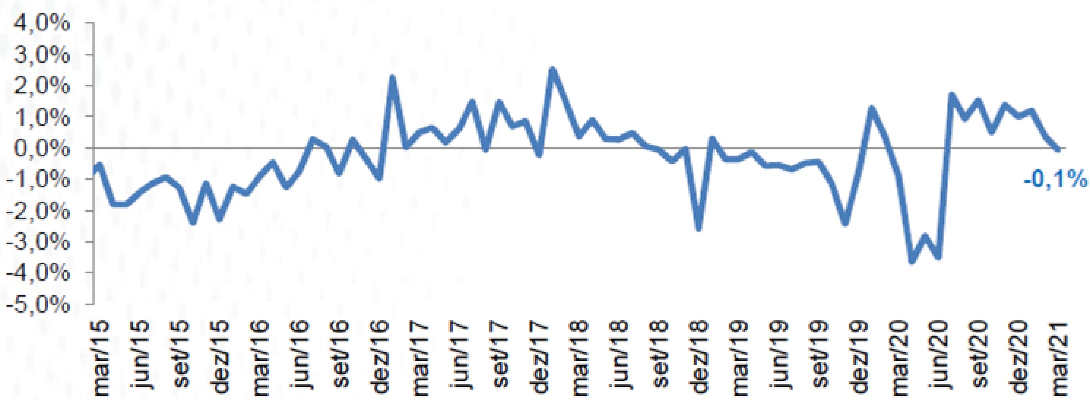


Source: Sindipecas

[Gráfico 7] Evolução do emprego nacional
Variação em relação ao mesmo mês do ano anterior



[Gráfico 8] Evolução do emprego nacional
Variação % em relação ao mês anterior



Source: Sindipecas

SINDIPEÇAS

Relatório Balança Comercial

SINDIPEÇAS ABIPEÇAS

Principais resultados em abril

- As **exportações de autopeças** somaram US$ 550,1 milhões em abril. Em comparação ao mês imediatamente anterior, houve suave recuo de 4,6%, mas frente a abril de 2020 (US$ 293,6 milhões), em razão do fechamento dos mercados naquele período, aumento de 87,4%. A despeito da intensidade das variações, vale notar que nos últimos dois meses as exportações retomaram o patamar que haviam apresentado no último trimestre de 2020, isto é, ao redor de quinhentos milhões de dólares.
- As **importações** totalizaram US$ 1,5 bilhão no mês em tela, com queda de 14,0% no confronto ao mês de março. Em relação a abril/2020 (US$ 576,0 milhões), notou-se incremento de 163,2% por conta das motivações conhecidas.
- No primeiro quadrimestre do ano, as importações (US$ 5,02 bilhões) subiram 65,6%, enquanto as exportações (US$ 2,06 bilhões) apenas 10,1%. Além de sinalizar firme recuperação da atividade do setor, com a volta à normalidade dos mercados, tal situação gerou déficit comercial no período de US$ 2,96 bilhões, incremento de 155% em relação aos primeiros quatro meses de 2020.
- Do lado das exportações até abril, Argentina, EUA e México seguiram como principais mercados de destino, Para as importações, China, Alemanha e EUA representaram os nossos principais parceiros comerciais.

I – Saldo Comercial

[Tabela 1] Balança comercial de autopeças mensal

Acumulado do ano - em US$ FOB

Mês	Exportação		Var. (%) 2021/2020	Importação		Var. (%) 2021/2020	Resultado*		Var. (%) 2021/2020
	2021	2020		2021	2020		2021	2020	
JANEIRO	446.648.666	390.564.964	14,4	871.894.079	943.403.877	-7,6	-425.245.413	-552.838.913	-23,1
FEVEREIRO	491.095.299	662.037.761	-25,8	874.166.205	719.072.456	21,6	-383.070.906	-57.034.695	571,6
MARÇO	576.359.082	527.964.113	9,2	1.763.305.606	797.052.673	121,2	-1.186.946.524	-269.088.560	341,1
ABRIL	550.113.160	293.561.798	87,4	1.517.272.304	576.559.356	163,2	-967.159.144	-282.997.558	241,8
MAIO									
JUNHO									
JULHO									
AGOSTO									
SETEMBRO									
OUTUBRO									
NOVEMBRO									
DEZEMBRO									
Variação acumulada no período (%)	**2.064.216.207**	**1.874.128.636**	**10,1**	**5.026.638.194**	**3.036.088.362**	**65,6**	**-2.962.421.987**	**-1.161.959.726**	**155,0**

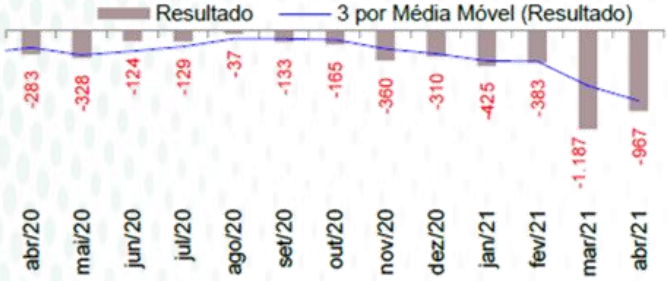
Fonte: Secretaria Especial de Comércio Exterior e Assuntos Internacionais/Ministério da Economia. Elaboração do Sindipeças

*(-) indica déficit, (+) indica superávit

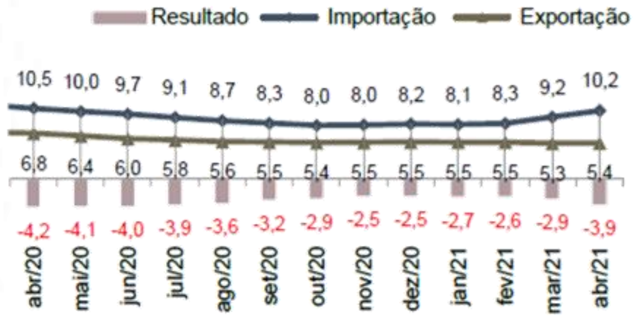
Industria Nacional de Autopartes, A.C.

Source: Sindipecas

[Gráfico 1] **Resultado mensal da balança comercial de autopeças**
Em milhões de US$ FOB a.m.



[Gráfico 2] **Balança comercial de autopeças**
Em bilhões de US$ FOB acum. 12 meses



[Tabela 2] Balança comercial de autopeças por UF

Em US$ FOB

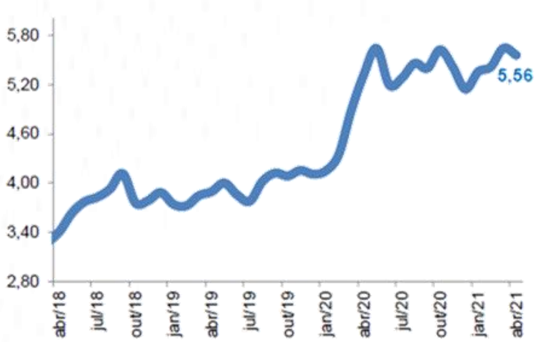
UF	Exportação		Var. (%)	Importação		Var. (%)	Resultado	
	Jan-Abr/21	Jan-Abr/20	2021/2020	Jan-Abr/21	Jan-Abr/20	2021/2020	Jan-Abr/21	Jan-Abr/20
SP	1.068.624.062	920.661.179	16,1	2.589.541.461	1.705.135.345	51,9	-1.520.917.399	-784.474.166
PR	171.547.463	259.289.109	-33,8	564.332.823	271.244.018	108,1	-392.785.360	-11.954.909
MG	286.552.361	205.456.037	39,5	238.525.074	106.014.948	125,0	48.027.287	99.441.089
RS	200.087.627	172.788.289	15,8	306.728.001	165.605.442	85,2	-106.640.374	7.182.847
SC	194.502.284	179.642.811	8,3	293.786.992	173.272.632	69,6	-99.284.708	6.370.179
RJ	108.145.474	112.161.537	-3,6	200.627.036	70.295.231	185,4	-92.481.562	41.866.306
PE	22.706.855	10.981.884	106,8	287.913.903	61.861.383	365,4	-265.207.048	-50.879.499
AM	5.945.968	4.619.899	28,7	155.680.770	165.759.820	-6,1	-149.734.802	-161.139.921
BA	1.479.684	5.528.904	-73,2	82.696.741	87.905.129	-5,9	-81.217.057	-82.376.225
CE	2.482.829	1.914.485	29,7	56.607.604	56.310.069	0,5	-54.124.775	-54.395.584
CONSUMO DE BORDO	0	0	0,0	0	0	0,0	0	0
NÃO DECLARADAS	0	9.178	0,0	1	60.799	-100,0	-1	-51.621
REEXPORTAÇÃO	0	0	0,0	0	0	0,0	0	0
10 PRINCIPAIS ESTADOS	2.062.074.607	1.873.044.134	10,1	4.776.440.405	2.863.404.017	66,8	-2.714.365.798	-990.359.883
DEMAIS ESTADOS	2.141.600	1.075.324	99,2	250.197.788	172.623.546	44,9	-248.056.189	-171.599.843
CB, RE, ND	0	9.178	-	1	60.799	-	-1	-51.621
Total	**2.064.216.207**	**1.874.128.636**	**10,1**	**5.026.638.194**	**3.036.088.362**	**65,6**	**-2.962.421.987**	**-1.161.959.726**

Fonte: Secretaria Especial de Comércio Exterior e Assuntos Internacionais/Ministério da Economia. Elaboração do Sindipeças

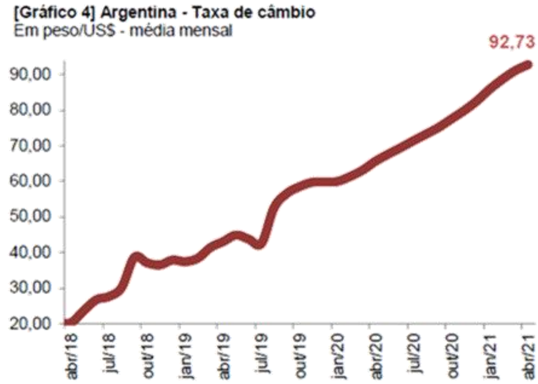
Nota: De acordo com a nova classificação do MDIC, vigente desde janeiro de 2017, foram incluídos consumo de bordo[1](UF 94) e reexportação[2](UF 97) na apresentação dos dados da balança comercial por estados da federação.

II – Câmbio

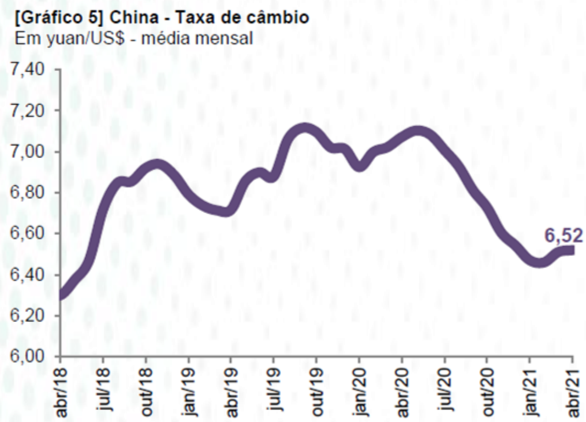
[Gráfico 3] **Brasil – Dólar comercial (PTAX-compra)**
Em R$/US$ - média mensal

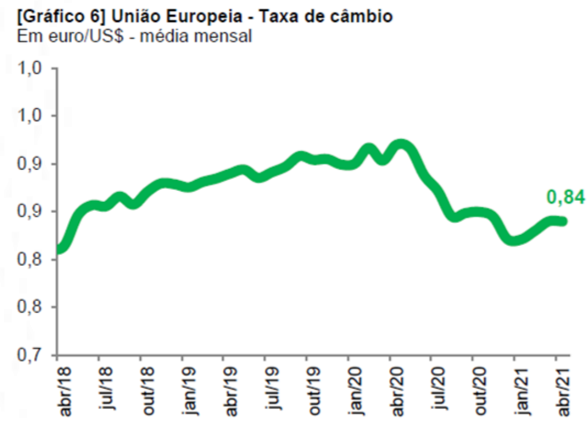


[Gráfico 4] **Argentina - Taxa de câmbio**
Em peso/US$ - média mensal



Source: Sindipecas





III – Exportações

[Tabela 3] Exportações acumuladas no ano por país

Em US$ FOB

Ordem	País	Jan-Abr/21	Jan-Abr/20	Var.(%) 2021/2020	Part. (%) 2021
1	ARGENTINA	567.303.342	364.260.231	55,7	27,5
2	ESTADOS UNIDOS	360.465.567	337.068.558	6,9	17,5
3	MÉXICO	232.753.479	243.884.185	-4,6	11,3
4	ALEMANHA	145.243.193	140.406.690	3,4	7,0
5	ITÁLIA	89.446.903	45.064.322	98,5	4,3
6	CHILE	60.180.169	48.802.613	23,3	2,9
7	COLÔMBIA	55.220.352	61.360.793	-10,0	2,7
8	POLÔNIA	51.151.777	75.047.296	-31,8	2,5
9	PARAGUAI	36.847.454	25.478.051	44,6	1,8
10	REINO UNIDO	32.679.702	32.243.784	1,4	1,6
11	PAÍSES BAIXOS (HOLANDA)	31.114.107	169.927.002	-81,7	1,5
12	TRINIDAD E TOBAGO	30.948.204	266.628	11507,3	1,5
13	FRANÇA	30.101.858	26.188.351	14,9	1,5
14	PERU	28.182.825	25.917.937	8,7	1,4
15	CHINA	26.909.799	19.357.153	39,0	1,3
16	ÍNDIA	23.384.236	13.080.799	78,8	1,1
17	URUGUAI	20.635.698	20.407.478	1,1	1,0
18	NORUEGA	20.213.089	29.089.257	-30,5	1,0
19	BOLÍVIA	17.798.936	11.736.098	51,7	0,9
20	ÁFRICA DO SUL	17.529.917	14.911.518	17,6	0,8
	20 PRINCIPAIS MERCADOS	1.878.110.607	1.704.498.744	10,2	91,0
	OUTROS 166 MERCADOS	186.105.600	169.629.892	9,7	9,0
	TOTAL DE 186 MERCADOS	**2.064.216.207**	**1.874.128.636**	**10,1**	**100**

Fonte: Secretaria Especial de Comércio Exterior e Assuntos Internacionais/Ministério da Economia. Elaboração do Sindipeças

Source: Sindipecas

IV – Importações

[Tabela 7] Importações acumuladas no ano por país

Em US$ FOB

Ordem	País	Jan-Abr/21	Jan-Abr/20	Var.(%) 2021/2020	Part. (%) 2021
1	CHINA	803.073.263	494.661.666	62,3	16,0
2	ALEMANHA	517.299.984	338.628.804	52,8	10,3
3	ESTADOS UNIDOS	516.642.511	302.662.009	70,7	10,3
4	JAPÃO	444.655.470	312.183.428	42,4	8,8
5	MÉXICO	354.660.131	262.483.947	35,1	7,1
6	ITÁLIA	312.224.161	94.729.243	229,6	6,2
7	COREIA DO SUL	304.711.705	220.239.479	38,4	6,1
8	ARGENTINA	266.070.509	141.565.903	87,9	5,3
9	TAILÂNDIA	211.119.052	146.558.720	44,1	4,2
10	ÍNDIA	141.297.946	87.607.460	61,3	2,8
11	SUÉCIA	137.873.898	31.928.759	331,8	2,7
12	FRANÇA	136.097.420	60.349.379	125,5	2,7
13	ESPANHA	78.470.911	43.569.961	80,1	1,6
14	REINO UNIDO	67.401.484	34.160.818	97,3	1,3
15	PARAGUAI	64.072.298	48.648.387	31,7	1,3
16	INDONÉSIA	59.724.525	61.280.437	-2,5	1,2
17	POLÔNIA	52.155.711	27.920.486	86,8	1,0
18	TCHECA, REPÚBLICA	49.748.052	27.219.035	82,8	1,0
19	PAÍSES BAIXOS (HOLANDA)	48.289.398	24.501.567	97,1	1,0
20	TURQUIA	46.294.325	20.710.869	123,5	0,9
	20 PRINCIPAIS MERCADOS	4.611.882.754	2.781.610.357	65,8	91,7
	OUTROS 136 MERCADOS	414.755.440	254.478.005	63,0	8,3
	TOTAL DE 156 MERCADOS	**5.026.638.194**	**3.036.088.362**	**65,6**	**100,0**

Fonte: Secretaria Especial de Comércio Exterior e Assuntos Internacionais/Ministério da Economia. Elaboração do Sindipeças

Source: Sindipecas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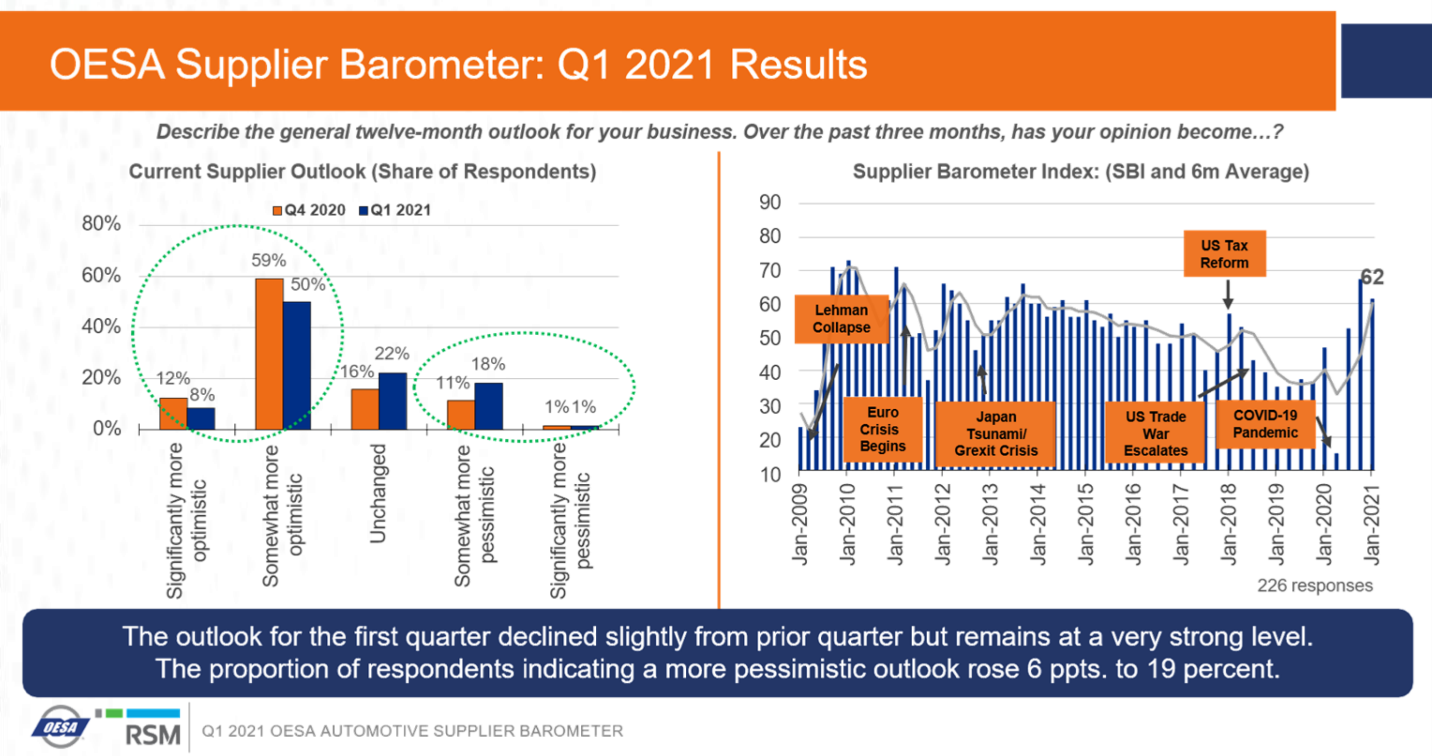
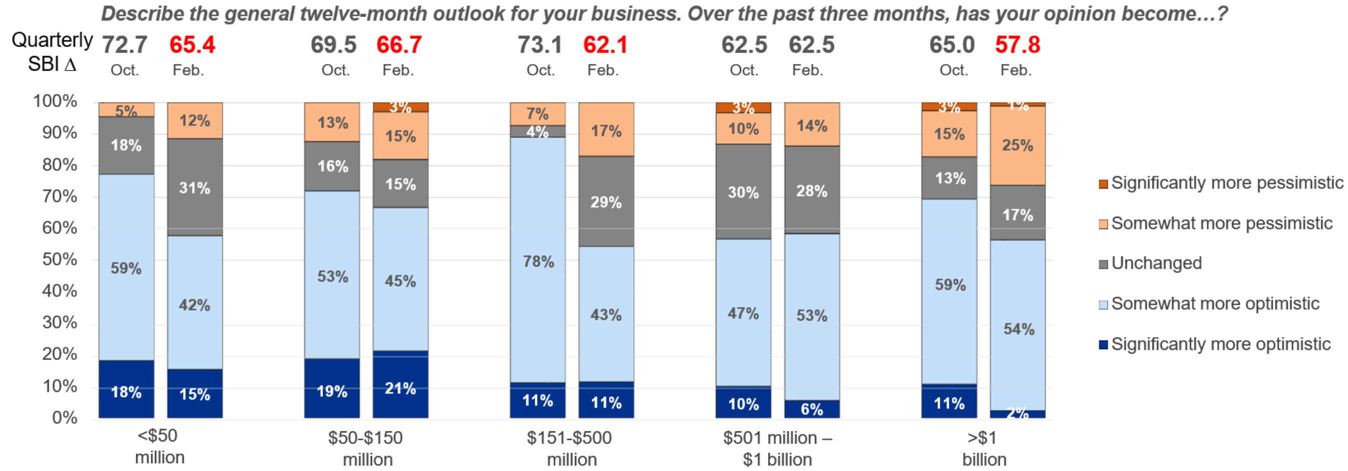
OESA AUTOMOTIVE SUPPLIER BAROMETER™
Q1 2021
PRODUCTION, PLANNING & ELECTRIFICATION


OESA Supplier Barometer: Q1 2021 Results
Describe the general twelve-month outlook for your business. Over the past three months, has your opinion become…?
Current Supplier Outlook (Share of Respondents)
Q4 2020
Q1 2021
80%
60%
40%
20%
0%
12%
8%
59%
50%
16%
22%
11%
18%
1%
1%
Significantly more optimistic
Somewhat more optimistic
Unchanged
Somewhat more pessimistic
Significantly more pessimistic
Supplier Barometer Index: (SBI and 6m Average)
90
80
70
60
50
40
30
20
10
Lehman Collapse
Euro Crisis Begins
Japan Tsunami/ Grexit Crisis
US Trade War Escalates
US Tax Reform
COVID-19 Pandemic
62
Jan-2009
Jan-2010
Jan-2011
Jan-2012
Jan-2013
Jan-2014
Jan-2015
Jan-2016
Jan-2017
Jan-2018
Jan-2019
Jan-2020
Jan-2021
226 responses
The outlook for the first quarter declined slightly from prior quarter but remains at a very strong level. The proportion of respondents indicating a more pessimistic outlook rose 6 ppts. to 19 percent.
RSM
Q1 2021 OESA AUTOMOTIVE SUPPLIER BAROMETER

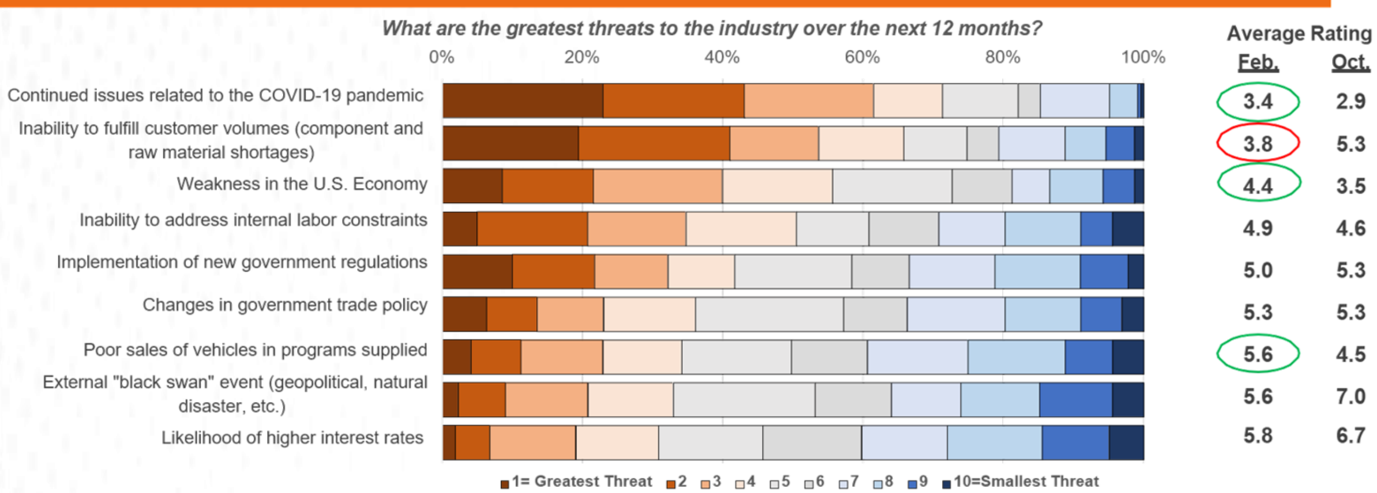
Source: OESA

OESA Supplier Barometer: Q1 2021 Results By Revenue



Regardless of revenue size, responses are optimistic on net, however less so in comparison to the end of 2020. The largest, most globally exposed, firms remain the least optimistic on net.

OESA Supplier Barometer: Industry Threats

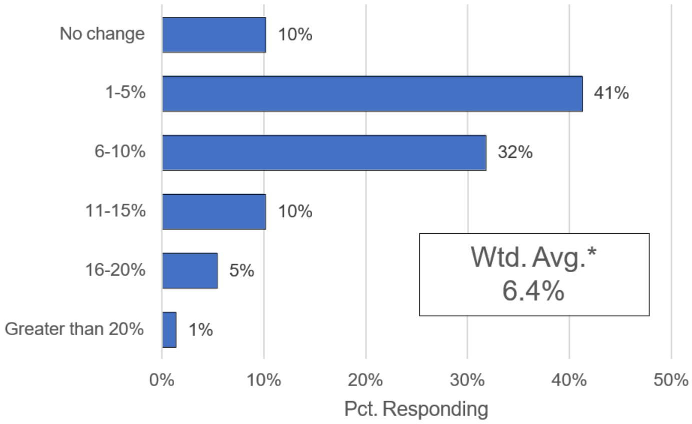


Continued issues related to the pandemic remains as the greatest threat to the industry but eased sequentially. Inability to fulfill customer volumes due to input shortages shot to the second greatest threat the industry faces.

Source: OESA

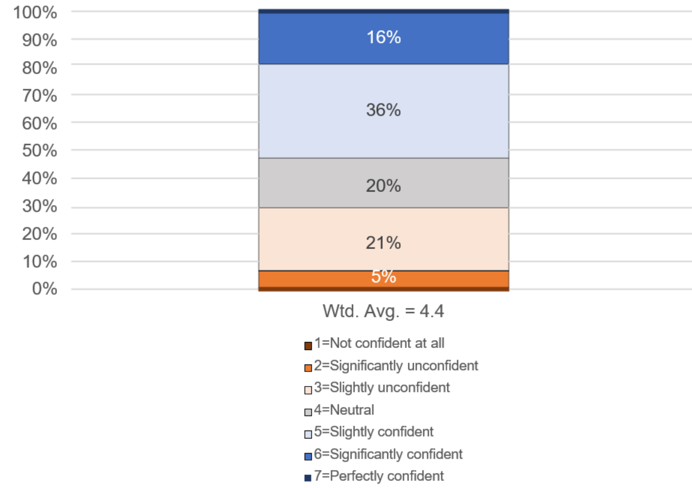
Semiconductor Shortages

Please estimate the North American production volume you are discounting in comparison to before the shortage was prevalent? (Respondents with negative impact)



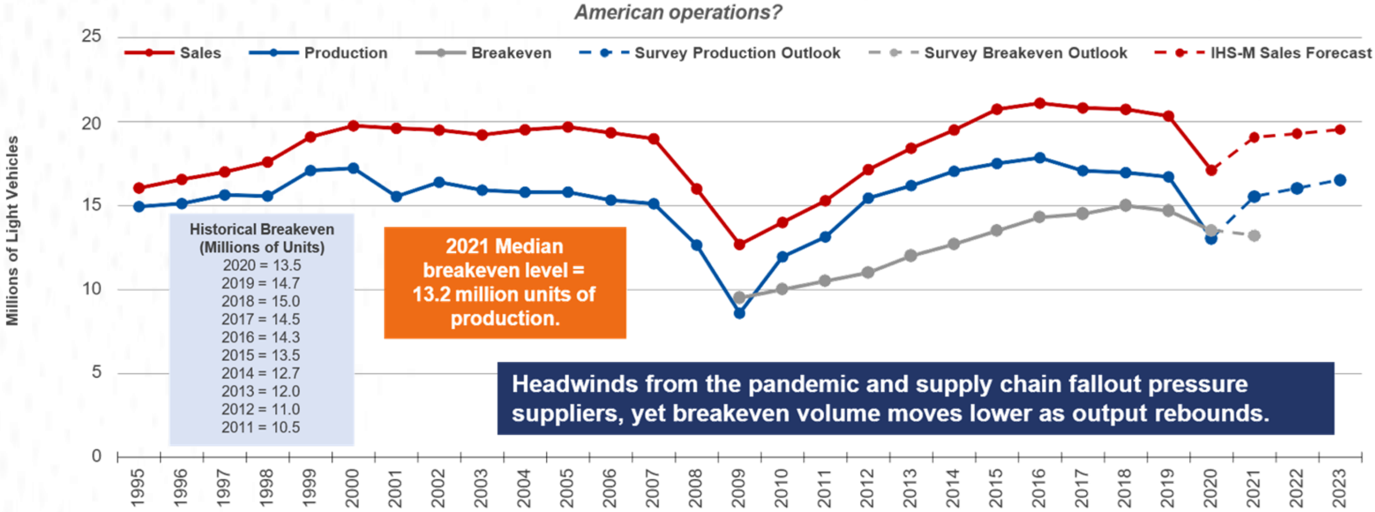
* Assumes mid-point of each range,
Greater than 20% = 23%

How confident are you that the industry will be able to recoup any North American production losses in the second half of 2021? (Respondents with negative impact)



Production Planning: Breakeven and Year-End Estimates

Considering North America light duty vehicle production, estimate the required 2020 industry volume needed to achieve breakeven in your North American operations?

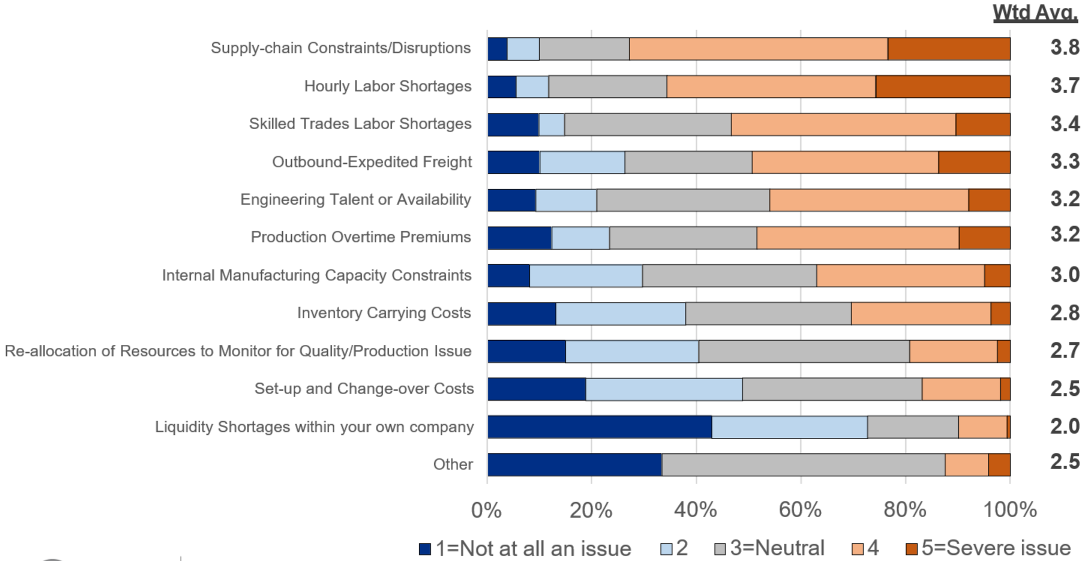


Source: IHS Markit (History, Sales and Production); IHS Markit (Sales Forecast)

Source: OESA

Production Planning: Internal Issues

Over the next 12 months, identify which of the following internal issues you will face as you meet required levels of production?

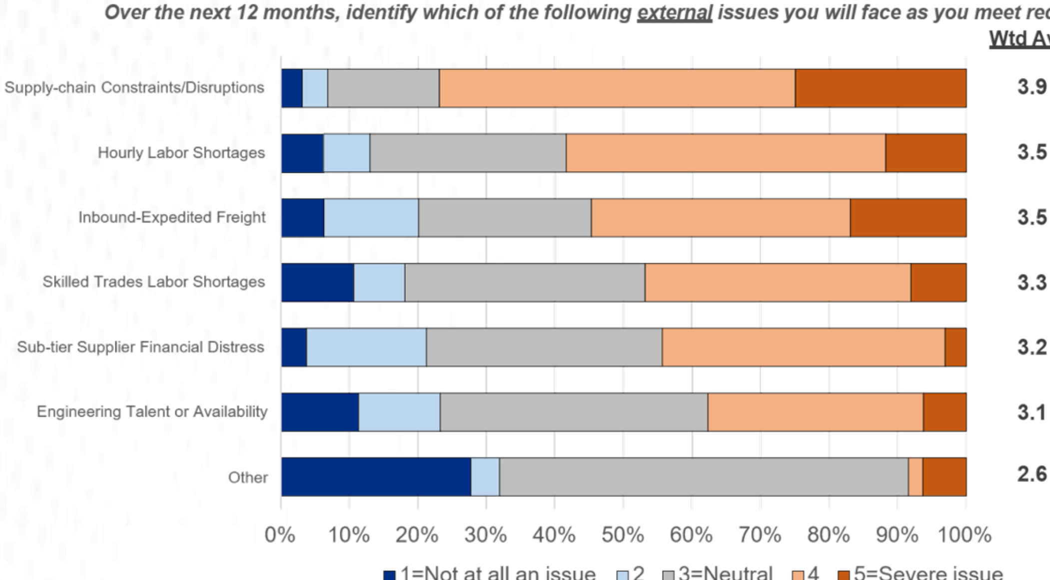


Other Issues and Comments:

- OEM's need to support the supply chain with firm raw material releases that go out beyond current forecast to ensure supply and reduce cost impacts.
- COVID
- Potential COVID labor Impact remains high risk
- Customer pressure on margins; price decreases, unwillingness to assist in issues related to Pandemic, etc.
- Variability in OEM order patterns that are constantly changing in mix so that they create additional overtime cost and excessive inventory carrying costs and in some cases obsolescence
- Labor turnover

Production Planning: External Issues

Over the next 12 months, identify which of the following external issues you will face as you meet required levels of production?



Other Issues and Comments:

- COVID mandates - Mexico in particular
- Inflation. Materials impacts.
- VISA constraints for foreign workers
- Raw Material prices and also the capability of our equipment suppliers to meet the new timing industry standards moving from 3 years to 12-18 months for full industrialization
- We have one supplier of a unique raw material that has constrained capacity so there will be shortages and relatively significantly affect us.

Source: OESA

Production Planning: Research & Development Spending

For 2021, estimate your R&D spending as a percent of total sales.

	Lower Quartile	Median Value	Upper Quartile
R&D Share of Total Sales			
2021	**2%**	**4%**	**6%**
2020	2%	4%	7%
2019	2%	4%	6%
2018	3%	4%	5%
2017	2%	4%	6%
2015	2%	3%	5%
2014	2%	3%	5%

R&D Spending is essentially unchanged from last year, at ~ 4% of total sales. Approximately 75% of the R&D budget is allocated towards the development of specific programs, while 25% is allocated to researching future technologies, equal to last year.

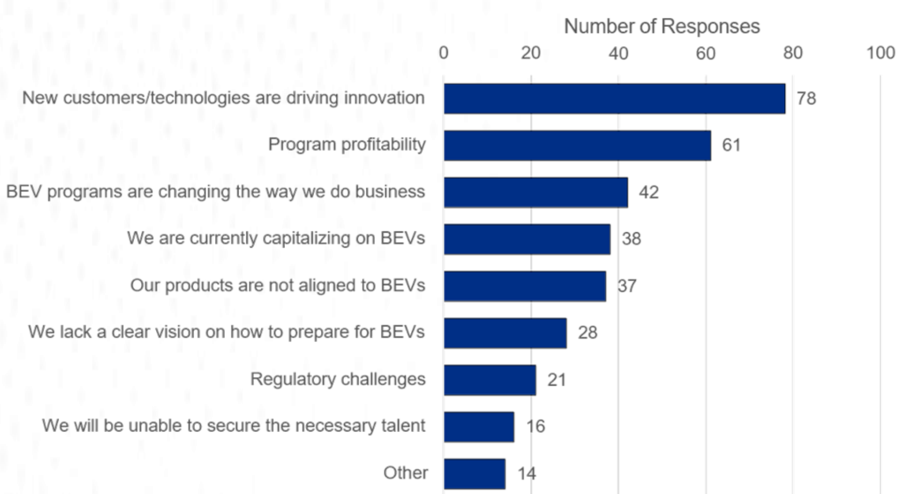
For 2021 R&D budget, estimate the percent allocated to research and percent allocated to development.

	Lower Quartile	Median Value	Upper Quartile
Research budget (for future technologies)			
2021	**20%**	**25%**	**38%**
2020	10%	25%	40%
2019	10%	20%	30%
2018	20%	32%	44%
2017	10%	20%	40%
2015	20%	30%	50%

	Lower Quartile	Median Value	Upper Quartile
Development budget (for specific programs)			
2021	**63%**	**75%**	**80%**
2020	60%	78%	90%
2019	70%	80%	90%
2018	50%	67%	80%
2017	58%	75%	85%
2015	35%	67%	80%

Electrification: Risks and Opportunities

What are your biggest challenges/opportunities as the industry prepares for a Battery Electric Vehicle (BEV) future?



Other Issues and Comments:

- This does not affect my business
- New BEV Customers
- Capital requirements for lower volume platforms
- Developing the right products
- Consumer sales will determine profitability. Unclear what the consumers are going to accept in terms of range, cost, and time to charge
- Timing of the programs
- Operation model from OEM's
- How to coexist ICE and BEV, uncertainty volumes, long ramp ups, long phase outs
- Low initial volumes
- Transition period from ICE to BEV products and manufacturing
- Across buyer platform knowledge that current suppliers can also supply parts needed in other platforms - cross platform buyer shared information continues to be void
- Volume volatility in OEM estimates for these programs
- Understanding how our products fit in and what the OEM will pay.

Source: OESA

Snapshot of Indian Automotive Industry

4th Largest Automotive industry globally

Contribution to Industrial GDP:
27 %

Employment:
Direct: 80 lakhs
Indirect: 2.90 crore

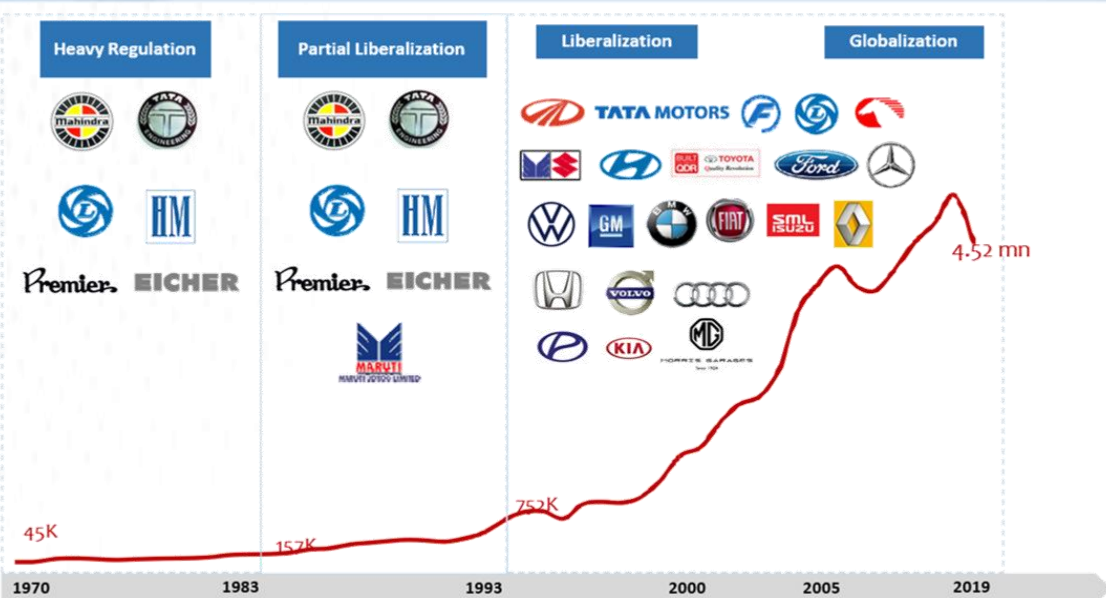
Contribution to GDP:
7.1 %

Exports:
8% of total export

Contribution to Manufacturing GDP:
49%

GST Contribution
Rs. 1.5 Lakhs Crore
(15% of total GST Collection)

Development of Automotive Industry

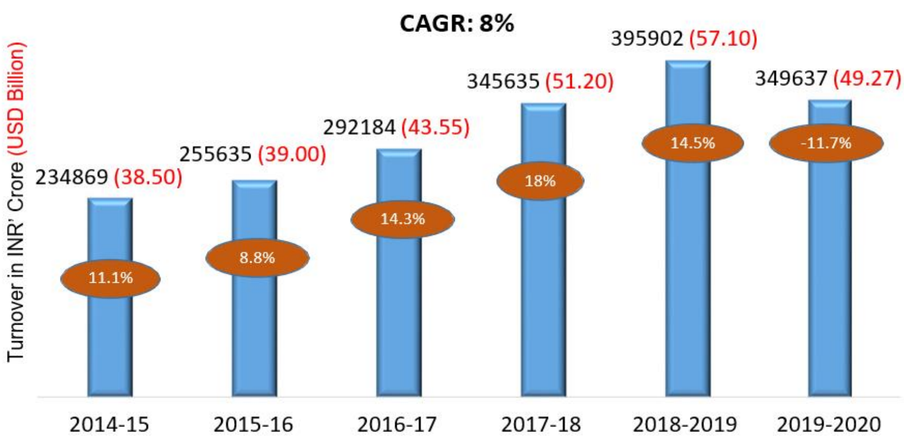


Production Volume (Passenger Vehicles + Commercial Vehicles)

Source: SIAM

Source: ACMA

Auto Components Industry Performance: FY19-20

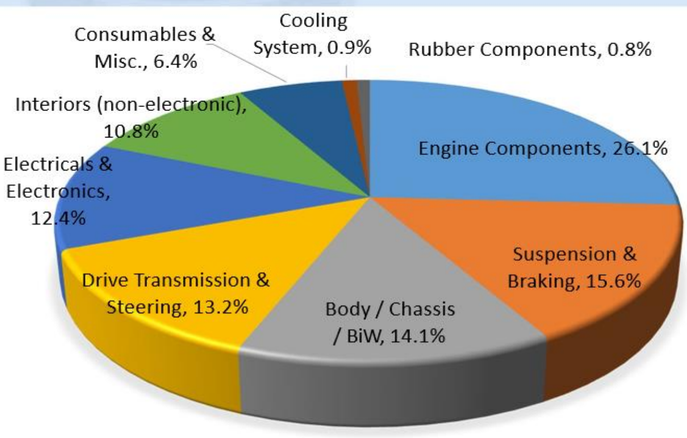


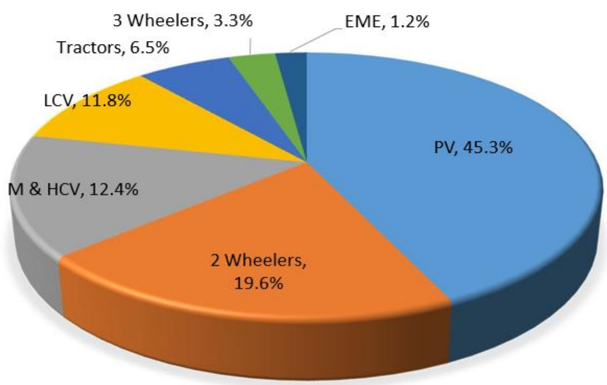
(Turnover includes supplies to OEMs, aftermarket sales and exports)

Growth

- Accounts for 2.3% of National GDP; 25% of manufacturing GDP
- 4% of exports
- Creates 50 lakh jobs
- Cost competitive; globally renowned for frugal engineering
- ~25% of exported; North America & Europe account for 60% of Exports
- India Share's in Global demand increased from 0.6% to 1.3% in last 10 years

Product Range and Auto Components Supply to OEMs





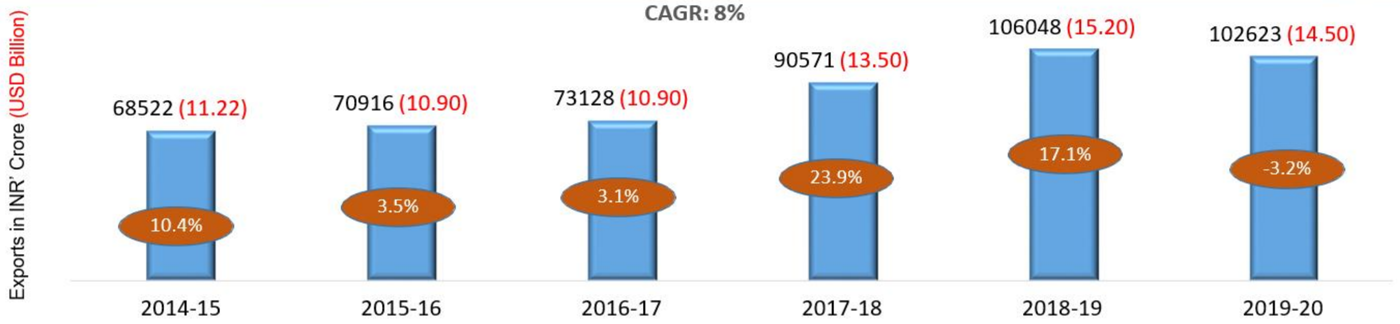
PV	Passenger Cars, Utility Vehicles, Vans
2Wh	Scooters, Motorcycles, Mopeds
LCV	All Commercial Vehicles < 7.5 T
M & HCVs	All Commercial Vehicles > 7.5 T
3Wh	Goods and Passenger 3 wheelers
Tractors	Tractors
EME	Earth Moving Equipment

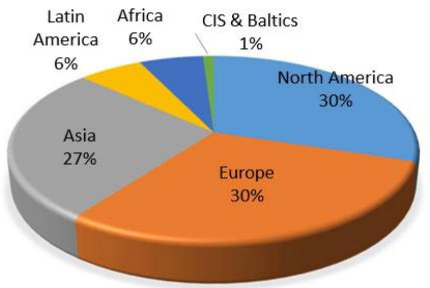
The produces high quality, price competitive Components

OEMs consumption includes locally produced Components and Imports

Source: ACMA

Exports – Auto Component Industry: 2019-20



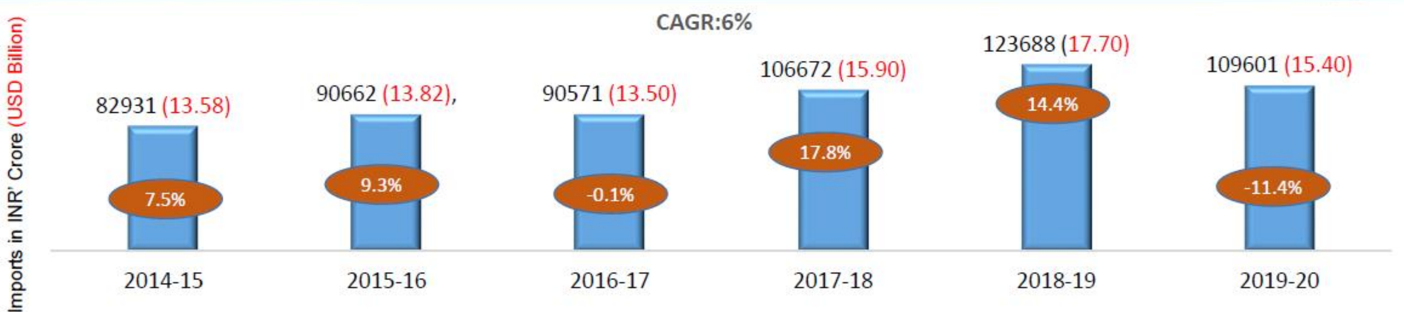


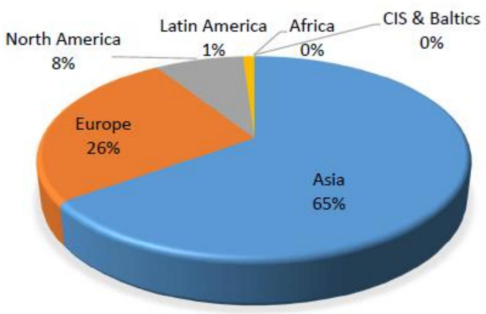
Export Destinations: Top 10 Countries in %

USA	26%	Brazil	4%
Germany	7%	Italy	3%
Turkey	4%	Bangladesh	3%
Thailand	4%	Mexico	3%
UK	4%	UAE	3%

61%

Imports – Auto Component Industry: 2019-20





Origin of Imports: Top 10 Countries in %

China	26%	Thailand	5%
South Korea	14%	Singapore	5%
Germany	11%	Italy	3%
Japan	9%	UK	3%
USA	7%	Belgium	3%

85%

Source: ACMA

INTRODUCCIÓN

Este Informe se refiere al Intercambio Comercial Argentino de Autopartes del año 2020.

Se utilizaron para este trabajo 284 posiciones arancelarias que representan integralmente al sector, en todos sus segmentos del negocio.

BALANZA COMERCIAL GLOBAL DE AUTOPARTES Año 2020

Período	Exportaciones USD mill. FOB	Exportaciones Cantidad de destinos	Importaciones USD mill. CIF	Importaciones Cantidad de origenes	Saldo Bal. Comercial USD mill.
2002	1.085	132	1.120	89	-36
2003	1.115	141	1.632	99	-517
2004	1.431	142	2.630	111	-1.199
2005	1.641	141	3.385	114	-1.744
2006	1.858	144	4.375	116	-2.517
2007	2.273	144	6.288	131	-4.015
2008	2.571	142	7.793	132	-5.223
2009	1.928	147	5.496	134	-3.568
2010	2.433	146	8.729	118	-6.297
2011	2.606	141	10.766	128	-8.160
2012	2.548	146	10.198	137	-7.650
2013	2.632	135	10.714	138	-8.081
2014	2.200	148	8.835	130	-6.635
2015	1.655	134	7.999	102	-6.344
2016	1.512	128	7.327	132	-5.816
2017	1.642	129	8.352	149	-6.709
2018	1.580	140	8.358	141	-6.778
2019	1.651	131	6.255	143	-4.604
2020	1.128	116	5.089	135	-3.962

Notas: Cifras en millones de dólares (Exportaciones a valores FOB, Importaciones CIF)
(e): Dada la restricción informativa de INDEC, la información es provisoria y sujeta a modificaciones
Fuente: AFAC en base a ABECEB e INDEC

El déficit comercial de autopartes en 2020 ascendió a 3.962 millones de dólares, cayendo un 13,9% con relación a 2019.

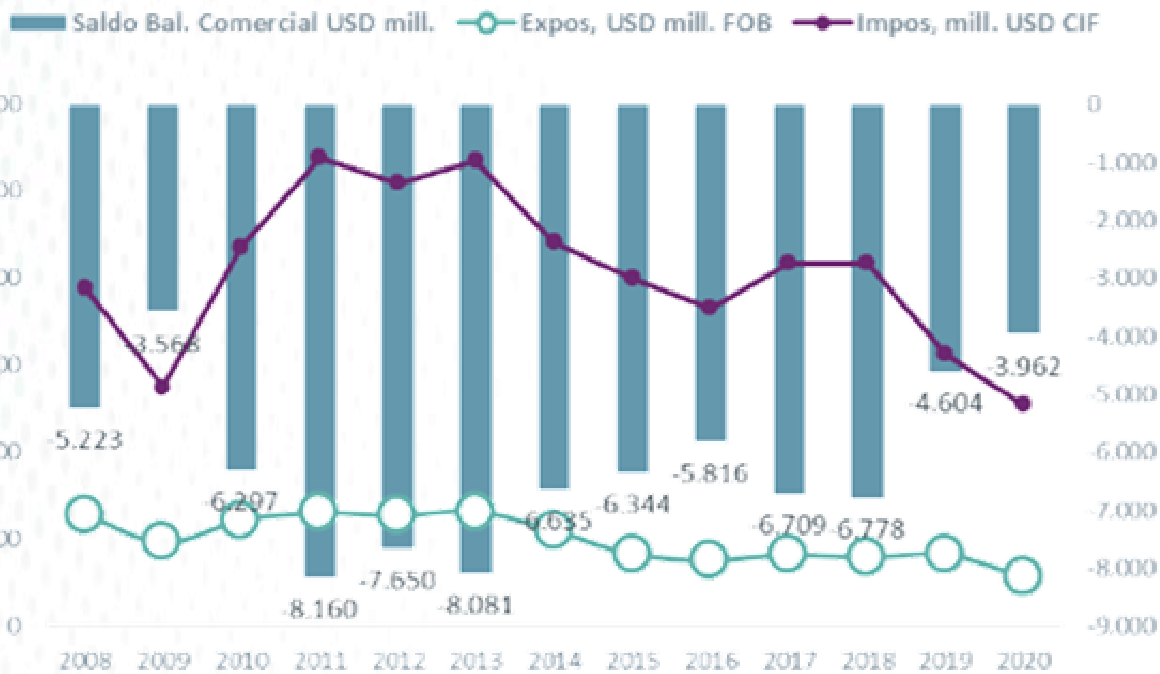
VARIACIONES - 2020

	12M 2019 (A)	12M 2020 (B)	Diferencia (B-A)	Variación (B/A)
Exportaciones	1.651	1.128	-523	-31,7%
Importaciones	6.255	5.089	-1.165	-18,6%
Saldo	-4.604	-3.962	642	-13,9%

Notas: Cifras en millones de dólares (Exportaciones a valores FOB, Importaciones CIF)
(e): Dada la restricción informativa de INDEC, la información es provisoria y sujeta a modificaciones
Fuente: AFAC en base a ABECEB e INDEC.

Source: AFAC

GRÁFICO Nro. 1: BALANZA COMERCIAL GLOBAL DE AUTOPARTES 2008 - 2020 (en millones de dólares)

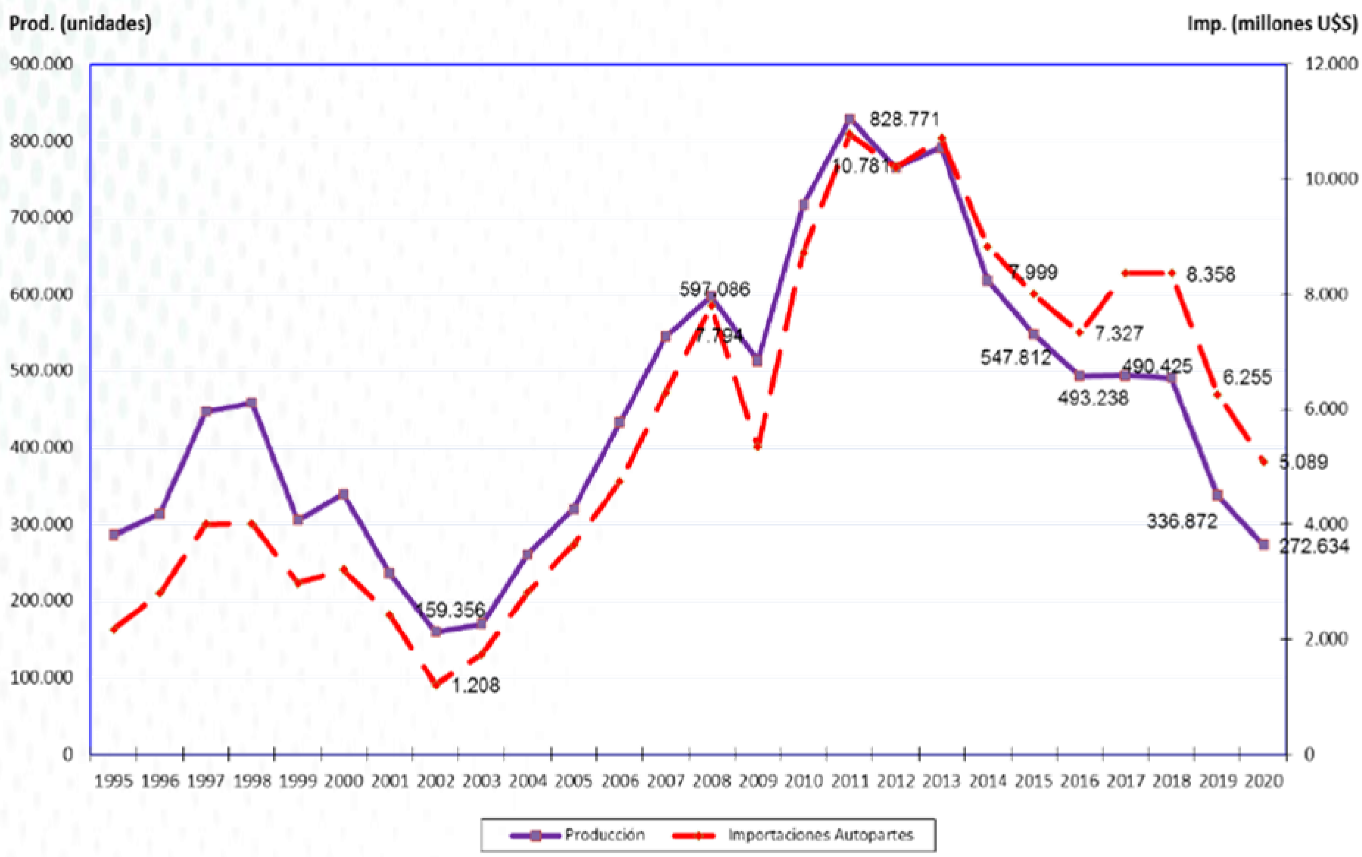


Las exportaciones de autopartes en 2020 alcanzaron los 1.128 millones de dólares, disminuyendo el 31,7% respecto al año anterior. Las importaciones fueron de 5.089 millones de dólares, cayendo el 18,6% en 2020, al mismo tiempo que la producción de vehículos disminuyó el 18,8%.

Se sigue observando una fuerte asociación entre las importaciones de autopartes y la producción de vehículos, siendo un fenómeno de índole estructural de las últimas dos décadas. En el gráfico adjunto se puede observar como las importaciones de autopartes y la producción de vehículos evolucionan de manera correlacionada, lo cual parece haberse profundizado entre 2013 y 2020.

El análisis de regresión (entre 1995 y 2020) para cuantificar el grado de relación entre las dos variables arroja un coeficiente R^2 del 85,1%, lo cual indica que el 85,1% de las variaciones de las importaciones de autopartes se explica por las variaciones de la producción de vehículos.

GRÁFICO Nro. 2: PRODUCCIÓN DE VEHÍCULOS E IMPORTACIONES DE AUTOPARTES 1995 - 2020
(producción en unidades, importaciones en millones de dólares)



Source: AFAC

EXPORTACIÓN POR PAÍS DE DESTINO - 2020

País	FOB U$S 12M 2020	Part. %	Part. Acum. %	FOB U$S 12M 2019	Var. % 20/19
Brasil	654.512.776	58,0%	58,0%	970.894.009	-32,6%
Estados Unidos	82.377.389	7,3%	65,3%	112.405.187	-26,7%
República Federal de Alemania	40.687.307	3,6%	68,9%	104.532.999	-61,1%
España	40.339.600	3,6%	72,5%	59.002.843	-31,6%
Chile	29.012.567	2,6%	75,1%	41.410.904	-29,9%
Sudáfrica	30.916.903	2,7%	77,8%	47.124.546	-34,4%
México	32.104.630	2,8%	80,7%	40.732.910	-21,2%
Polonia	43.150.953	3,8%	84,5%	41.584.951	3,8%
Uruguay	21.689.230	1,9%	86,4%	29.699.130	-27,0%
Reino Unido	13.021.261	1,2%	87,6%	30.844.800	-57,8%
Paraguay	15.351.334	1,4%	88,9%	19.875.446	-22,8%
República Checa	7.152.949	0,6%	89,6%	17.860.380	-60,0%
Colombia	8.905.470	0,8%	90,4%	18.125.347	-50,9%
Bolivia	8.590.400	0,8%	91,1%	12.104.709	-29,0%
Eslovaquia	7.919.302	0,7%	91,8%	15.034.784	-47,3%
Canadá	1.615.703	0,1%	92,0%	5.007.864	-67,7%
Venezuela	2.583.586	0,2%	92,2%	5.167.285	-50,0%
Perú	10.040.825	0,9%	93,1%	9.002.688	11,5%
India	4.056.915	0,4%	93,5%	3.819.381	6,2%
Italia	6.578.987	0,6%	94,0%	5.262.135	25,0%
Resto del mundo	67.193.384	6,0%	100,0%	61.451.981	9,3%
Total general	**1.127.801.472**			**1.650.944.279**	**-31,7%**

Notas: cifras en dólares
(e): Dada la restricción informativa de INDEC, la información es provisoria y sujeta a modificaciones
Fuente: AFAC en base en ABECEB e INDEC.

EXPORTACIÓN POR GRANDES GRUPOS DE PRODUCTOS - 2020

Grupo	U$S FOB 12M 2020	Part. %	U$S FOB 12M 2019	Part. %	Var. % 20/19
Transmisión	454.585.606	40,3%	649.210.846	39,3%	-30,0%
Componentes de motor	194.517.089	17,2%	260.387.573	15,8%	-25,3%
Motores	159.067.666	14,1%	193.558.303	11,7%	-17,8%
Ruedas, neumáticos y cámaras	73.095.684	6,5%	193.397.525	11,7%	-62,2%
Carrocería y sus partes	43.824.274	3,9%	91.615.692	5,5%	-52,2%
Sistema de amortiguación, dirección y suspensión	52.775.705	4,7%	79.365.773	4,8%	-33,5%
Otras autopartes de plástico	46.173.620	4,1%	49.578.800	3,0%	-6,9%
Eléctrico	43.387.930	3,8%	49.353.700	3,0%	-12,1%
Equipamiento Interior	15.950.930	1,4%	31.857.036	1,9%	-49,9%
Otras autopartes de caucho	12.461.289	1,1%	14.898.151	0,9%	-16,4%
Otras autopartes de metal	12.348.204	1,1%	12.543.558	0,8%	-1,6%
Otras autopartes varias	12.045.633	1,1%	14.163.336	0,9%	-15,0%
Forja y Fundición	3.300.222	0,3%	6.235.643	0,4%	-47,1%
Acondicionador de aire, calefacción y sus componentes	2.923.736	0,3%	3.031.072	0,2%	-3,5%
Frenos	1.343.883	0,1%	1.747.271	0,1%	-23,1%
Total general	1.127.801.472		1.650.944.279		-31,7%

Notas: cifras en dólares.
(e): Dada la restricción informativa de INDEC, la información es provisoria y sujeta a modificaciones
Fuente: AFAC en base en ABECEB e INDEC.

Source: AFAC

IMPORTACIÓN POR PAÍS DE ORIGEN - 2020

País	U$S CIF 12M 2020	Part. %	Part. Acum. %	U$S CIF 12M 2019	Var. % 20/19
Brasil	1.421.713.740	27,9%	27,9%	1.774.739.444	-19,9%
Tailandia	663.277.883	13,0%	41,0%	766.455.375	-13,5%
China	592.986.434	11,7%	52,6%	671.252.443	-11,7%
República Federal de Alemania	366.649.591	7,2%	59,8%	545.439.890	-32,8%
Estados Unidos	383.415.550	7,5%	67,4%	504.586.163	-24,0%
Japón	320.202.655	6,3%	73,6%	358.645.635	-10,7%
México	137.034.046	2,7%	76,3%	167.507.298	-18,2%
Francia	141.943.829	2,8%	79,1%	146.657.530	-3,2%
Italia	100.587.376	2,0%	81,1%	126.190.409	-20,3%
Hungría	81.384.129	1,6%	82,7%	112.902.858	-27,9%
Polonia	70.368.460	1,4%	84,1%	90.579.815	-22,3%
España	76.031.309	1,5%	85,6%	89.618.607	-15,2%
Uruguay	53.463.403	1,1%	86,6%	75.341.206	-29,0%
Corea, República de	47.903.197	0,9%	87,6%	72.331.742	-33,8%
Sudáfrica	60.672.952	1,2%	88,8%	63.217.213	-4,0%
Filipinas	47.390.268	0,9%	89,7%	59.851.800	-20,8%
República Checa	45.912.292	0,9%	90,6%	50.306.609	-8,7%
Rumania	31.172.686	0,6%	91,2%	40.309.131	-22,7%
Indonesia	27.802.767	0,5%	91,8%	47.731.115	-41,8%
India	36.299.762	0,7%	92,5%	43.606.808	-16,8%
Resto del Mundo	383.256.658	7,5%	100,0%	447.263.965	-14,3%
Total general	**5.089.468.985**			**6.254.535.055**	**-18,6%**

Notas: cifras en dólares.
(e): Dada la restricción informativa de INDEC, la información es provisoria y sujeta a modificaciones
Fuente: AFAC en base a ABECEB e INDEC.

IMPORTACIÓN POR GRANDES GRUPOS DE PRODUCTOS - 2020

GRUPO	U$S CIF 12M 2020	Part. %	Part. Acum. %	U$S CIF 12M 2019	Part. %	Var. % 20/19
Transmisión	1.124.932.365	22,1%	22,1%	1.415.374.336	22,6%	-20,5%
Componentes de motor	869.769.869	17,1%	39,2%	1.044.087.843	16,7%	-16,7%
Eléctrico	715.455.117	14,1%	53,3%	857.833.375	13,7%	-16,6%
Carrocería y sus partes	387.550.014	7,6%	60,9%	499.158.332	8,0%	-22,4%
Motores	398.119.527	7,8%	68,7%	479.076.478	7,7%	-16,9%
Ruedas, neumáticos y cámaras	312.452.465	6,1%	74,8%	412.812.844	6,6%	-24,3%
Equipamiento Interior	270.333.833	5,3%	80,1%	329.493.004	5,3%	-18,0%
Otras autopartes de plástico	199.796.759	3,9%	84,1%	230.834.390	3,7%	-13,4%
Sistema de amortiguación, dirección y suspensión	177.895.606	3,5%	87,6%	215.130.626	3,4%	-17,3%
Otras autopartes varias	135.049.777	2,7%	90,2%	198.271.794	3,2%	-31,9%
Frenos	133.445.771	2,6%	92,8%	156.146.275	2,5%	-14,5%
Otras autopartes de metal	111.628.142	2,2%	95,0%	133.923.137	2,1%	-16,6%
Acondicionador de aire, calefacción y sus componentes	121.970.414	2,4%	97,4%	126.004.051	2,0%	-3,2%
Otras autopartes de caucho	77.958.955	1,5%	99,0%	92.440.911	1,5%	-15,7%
Forja y Fundición	53.110.371	1,0%	100,0%	63.947.660	1,0%	-16,9%
Total general	5.089.468.985			6.254.535.055		-18,6%

Notas: cifras en dólares
(e): Dada la restricción informativa de INDEC, la información es provisoria y sujeta a modificaciones
Fuente: AFAC en base a ABECEB e INDEC.

Source: AFAC

Research on Overseas Operations by Member Companies

The Research on Overseas Operations by Member Companies was launched in 1982 to compile data on the overseas development of member companies. Although the survey started later than the Survey on Shipment Trends of Automotive Parts, it has become an important indicator of the global development of the automotive parts industry.

The overseas business of our member companies has been expanding year by year, and in order to keep up with this development, we have changed the survey items and reporting format from this year.
The reason for this change is to "provide added value to the responding companies, in addition to the fact that some of the survey items themselves are not in line with the times“.

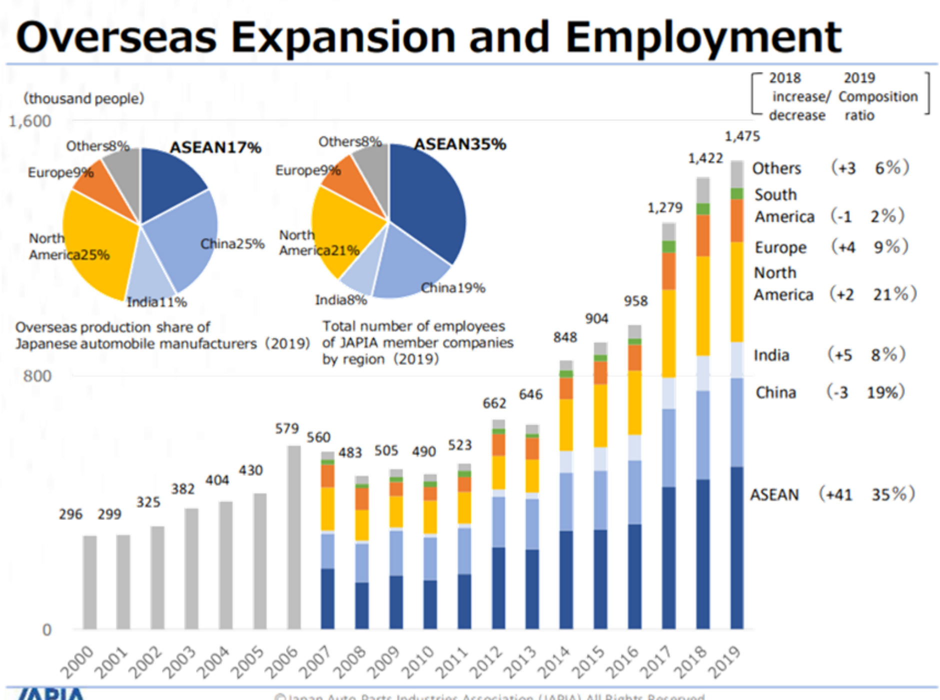
In making the changes, we redefined the purpose of the survey into the following three categories: first, to create statistical data showing the contribution of member companies to the global economy; second, to identify common issues facing the parts industry through the survey and reflect them in future projects of the association; and third, to reduce the number of questions to member companies by collecting information on overseas business trends in the parts industry in general.

Source: JAPIA

In the FY2019 survey (released in December 2020), the first survey in the new format, we examined the status of overseas expansion and employment, trends in overseas sales, profit status by region, and local procurement rates. As for the data, we have reviewed all items to include data as far back as possible so that the history can be tracked.

For example, in terms of the total number of employees by region, the data shows that the number of employees exceeded 1 million in fiscal 2017 and expanded to 1.48 million in 2019. This is proof that the overseas expansion of the components industry is creating jobs.

In addition, the local procurement rate by region has generally been maintained at 70%. Although there is a downward trend in all regions, the results show that we are contributing to the local economy.



Source: JAPIA

Business Trend Survey

The Business Trend Survey is a quarterly survey that compiles figures from the financial statements of listed companies whose sales ratio of automotive parts is 50% or more and whose financial results can be compared with those of the previous year. The survey was launched in 1996. The result is announced at the chairman's press conference held biannually in June and December and is used as an indicator to understand the actual business conditions of member companies.

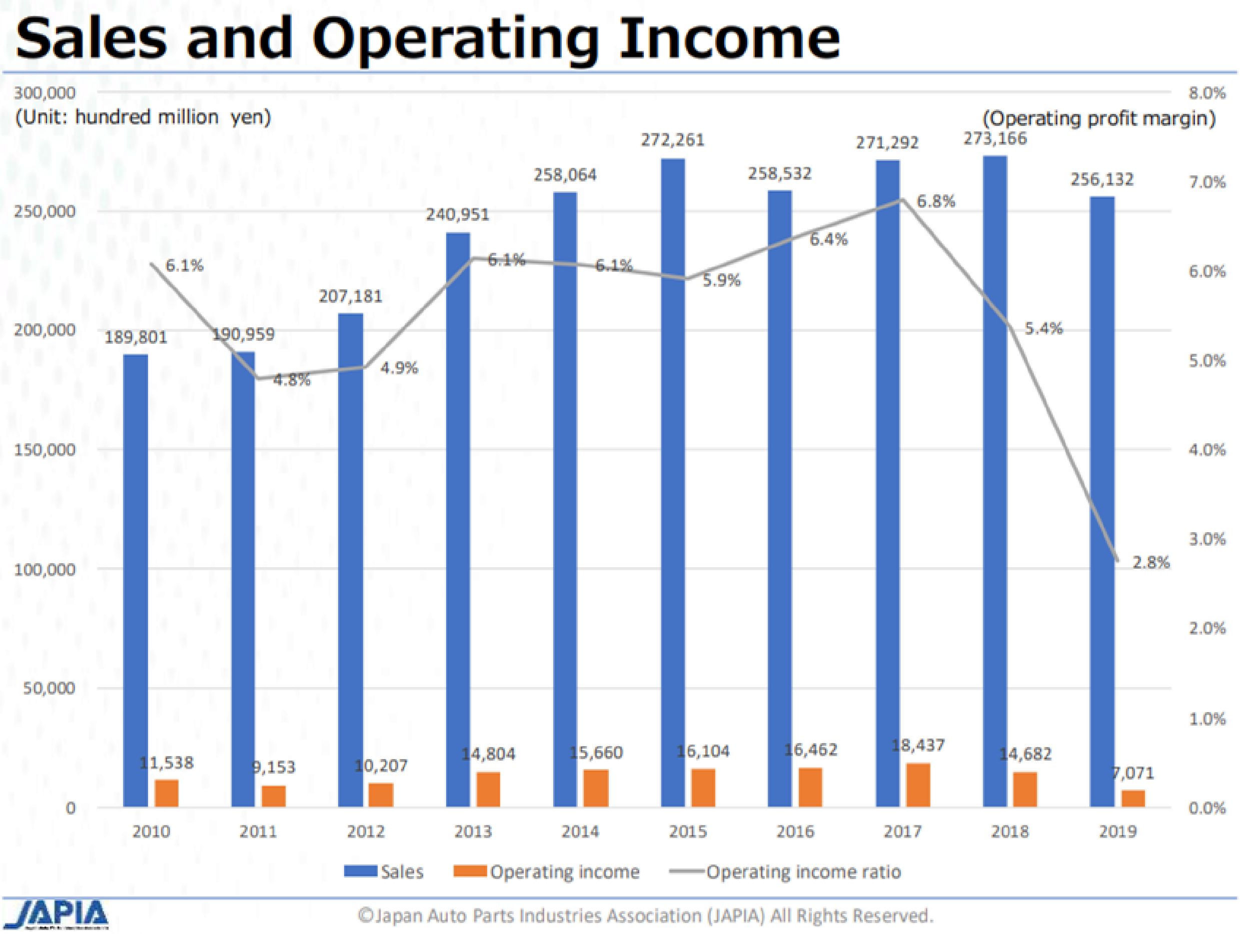
The purpose of this survey is to provide an indicator of industry trends by showing the business conditions of member companies based on the data. The survey is also intended to be compiled by JAPIA so that it can be used to confirm the status of member companies.

Unlike the Automotive Parts Shipment Trend Survey and the Research on Overseas Operations by Member Companies, the data is surveyed quarterly, making it the most comprehensive indicator of the current market environment and business conditions.

The most recent "Business Trends of the Auto Parts Industry in the Second Quarter of FY2020" released in December last year highlighted the fact that the spread of COVID-19 is taking a heavy toll on auto parts manufacturers.

Source: JAPIA

Of the 426 member companies, a total of 66 companies (listed companies whose sales ratio of auto parts is 50% or more and for which comparisons with the previous year are possible) reported a 25.5% decrease in sales compared to the same period of the previous year, while operating income and net income were forced to post losses.



Source: JAPIA

Monthly figures

	April 2021		January - April 2021	
	Volume	**± in %**	**Volume**	**± in %**
Passenger cars *)				
New registrations	229,650	90	886,100	8
Of which:				
German makes incl, group makes	160,370	97	633,700	10
Foreign makes	69,280	76	252,400	4
Exports	252,000	1011	968,500	21
Production	316,200	2701	1,254,600	22

Source: VDA / KBA

Commercial vehicles *)

	Volume	**±%**	**Volume**	**±%**
New registrations	31,130	60	120,440	15
CV up to 6 t	24,070	68	92,490	16
CV up to 2 t	1,150	62	4,290	0
CV over 2 to 3,5 t	22,280	71	86,150	18
CV over 3,5 to 6 t	640	12	2,050	1
CV over 6 t	6,650	35	26,270	14
CV over 6 to 16 t	1,550	12	6,170	4
CV over 16 t	5,100	44	20,100	17

Source: VDA

Commercial vehicles *)

	Volume	±%	Volume	±%
Buses	410	73	1,680	-9
Trailer	34,586	50	113,960	27
of which Semi-trailer	2,580	3	10,670	3
of which Caravans	2,545	50	7,650	-1
Export				
CV up to 6 t	14,240	1034	52,280	13
Production				
CV up to 6 t	19,900	2156	73,980	20

Source: KBA

Source: VDA

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