



IHS Markit®



Proyección de las ventas de Vehículos Ligeros, Mundo, Latinoamérica y Perú Encuentro Automotor

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Lima, 17 de Diciembre 2020

Lider en informacion, analisis y soluciones

50,000+

customers in over
140 countries

80%

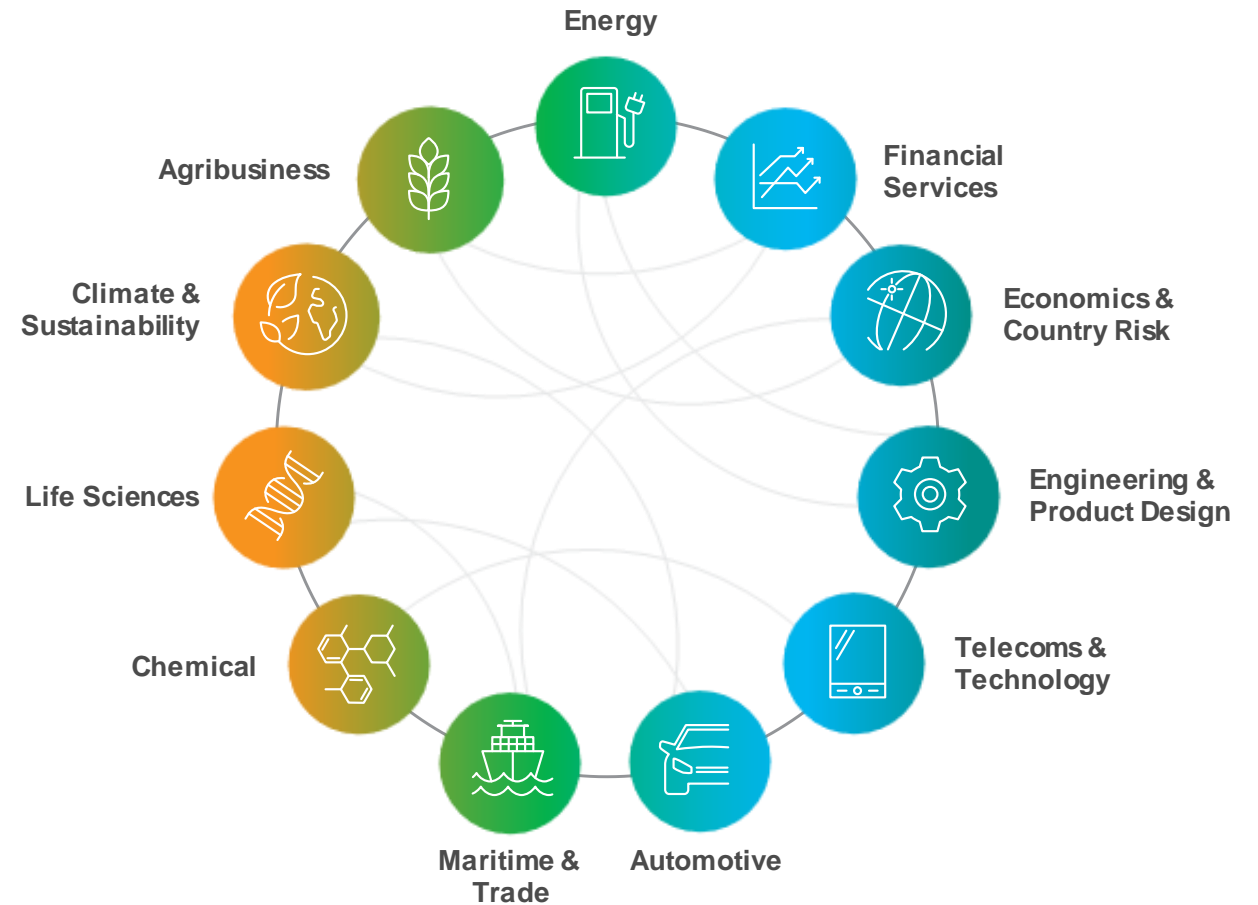
of the Fortune
Global 500

94/100

largest US corporates

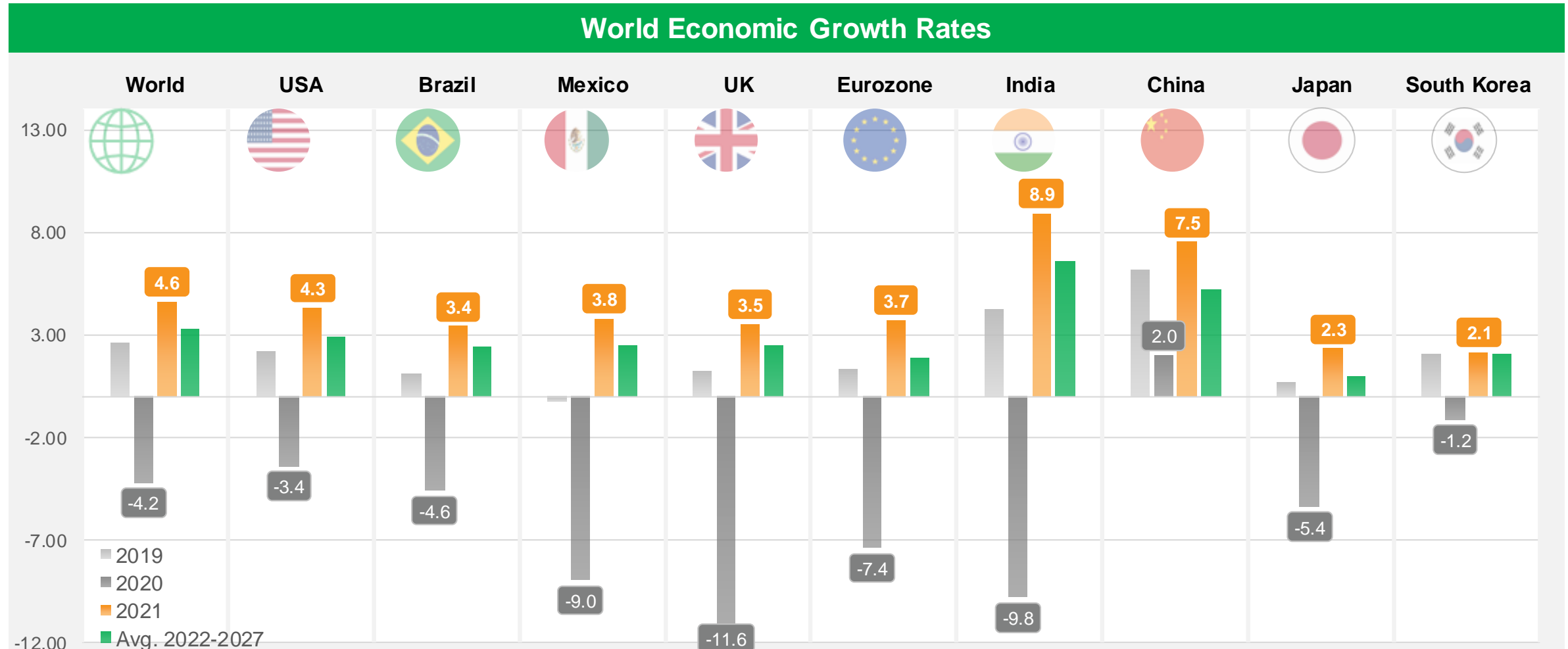
\$4B

annual revenue
NYSE: INFO



Economía Global

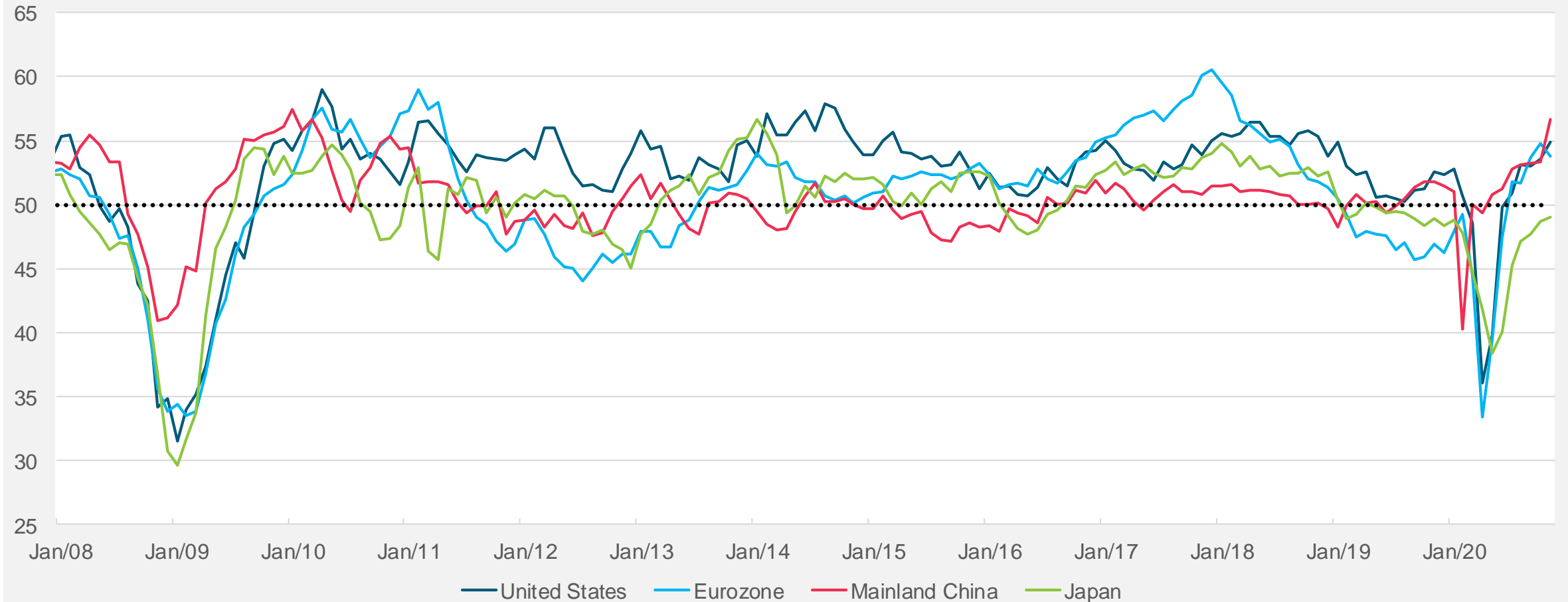
Apostando a una distribución masiva de la vacuna en 2021



World Economic IHS Markit manufacturing PMI®

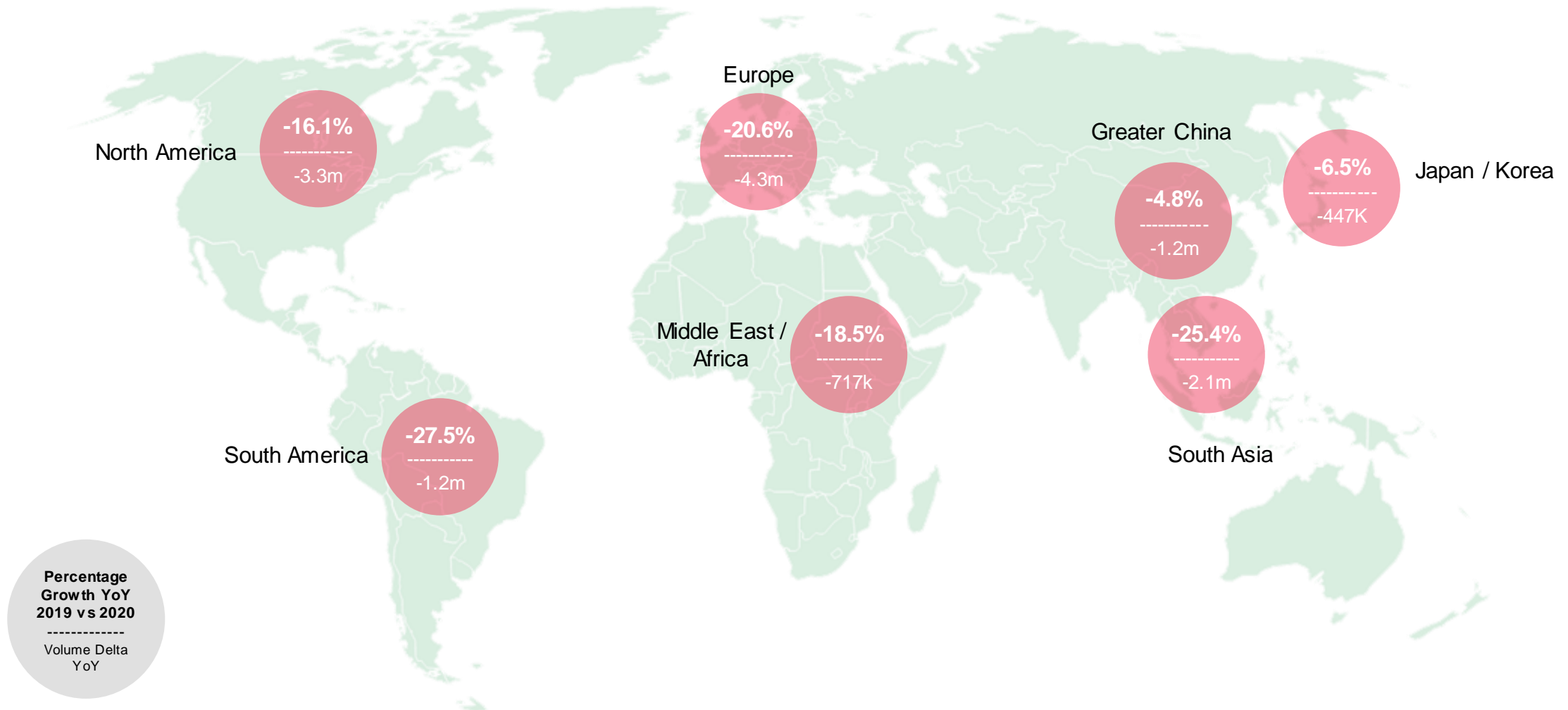
Produccion en manufactura ha repuntado desde el segundo trimestre

Purchasing Managers' Index® data



Ventas globales automotrices

Mercados maduros vs mercados en vías de desarrollo

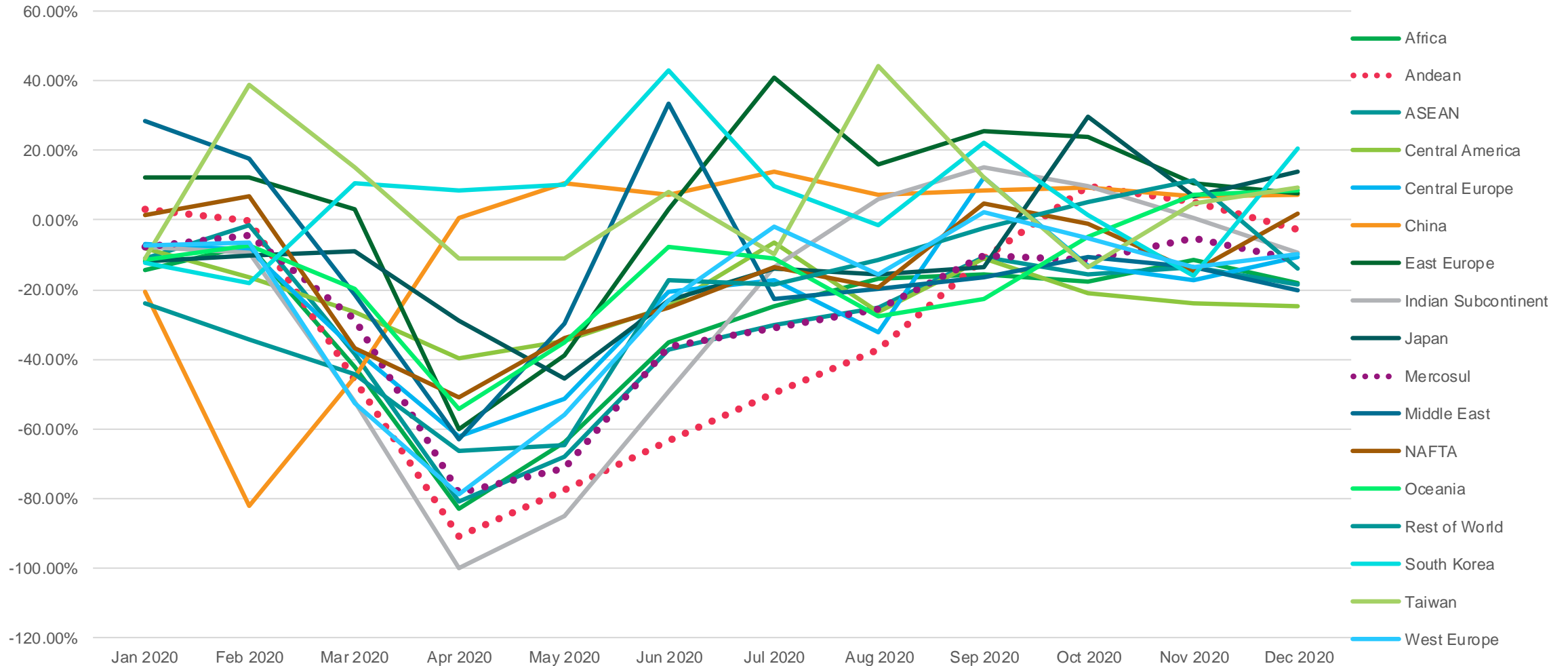


Percentage Growth YoY 2019 vs 2020

 Volume Delta YoY

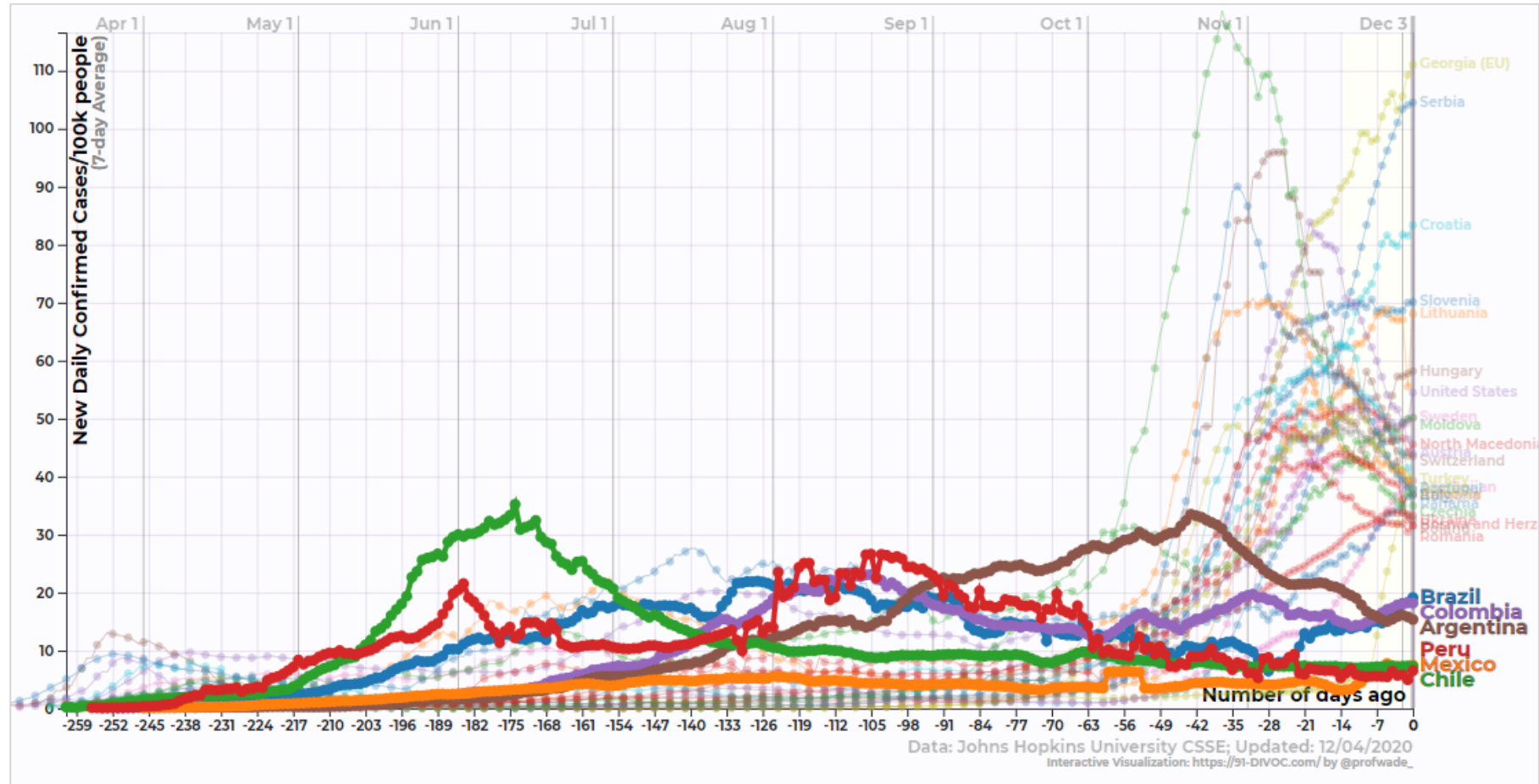
Ventas globales automotrices

Ventas por sub-region

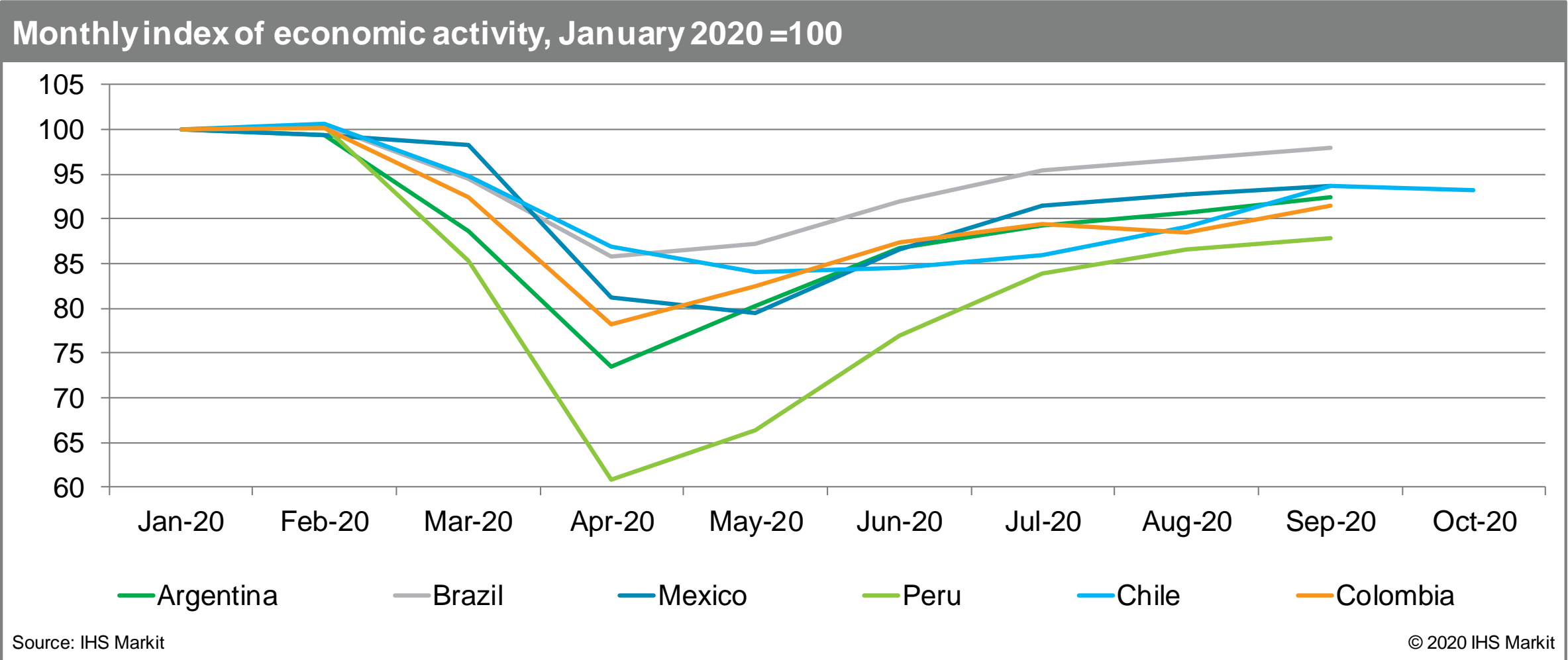


Propagación de COVID 19, Nuevos infectados, normalizado a población

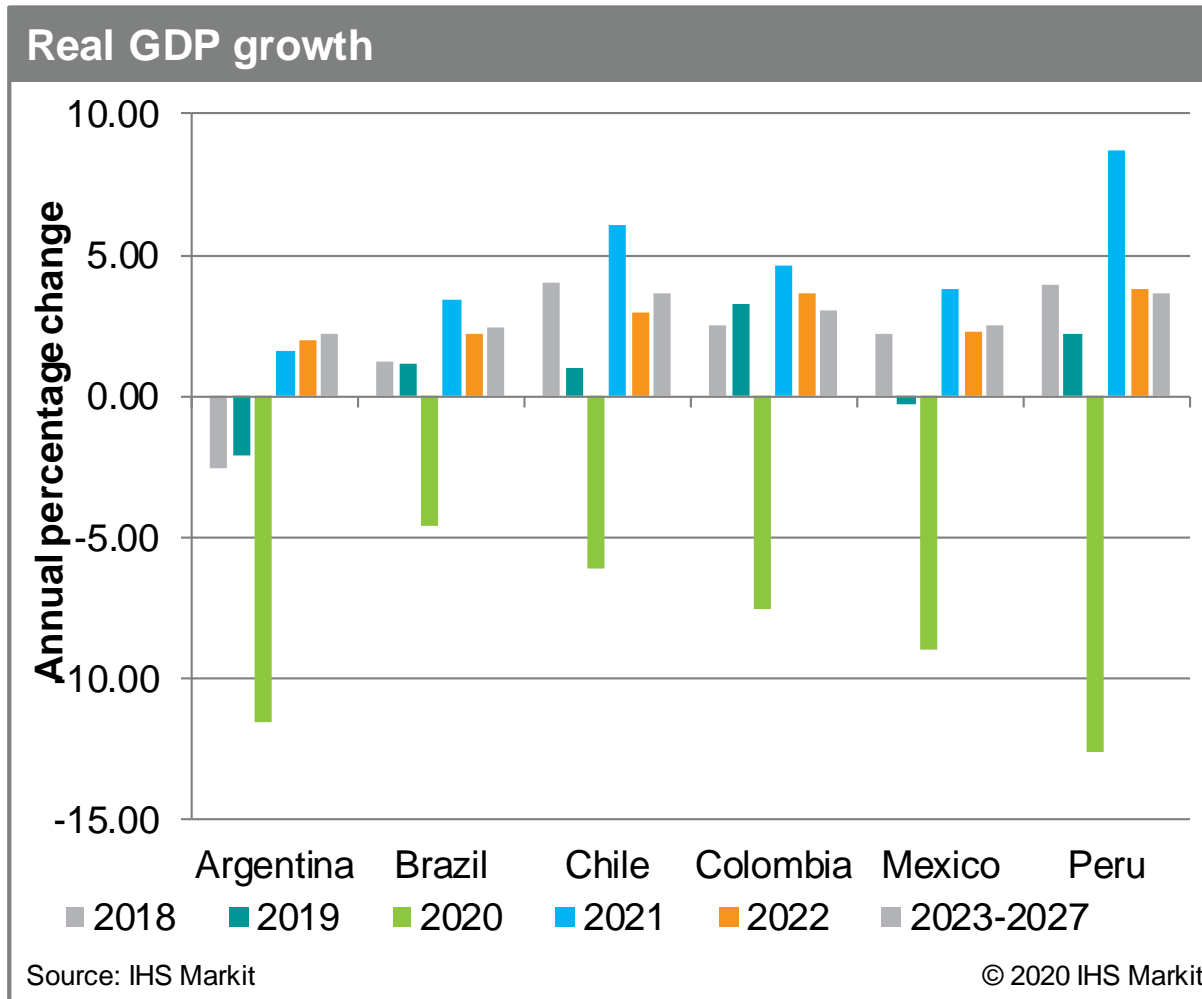
New Confirmed COVID-19 Cases per Day, normalized by population



Índice de Actividad Económica

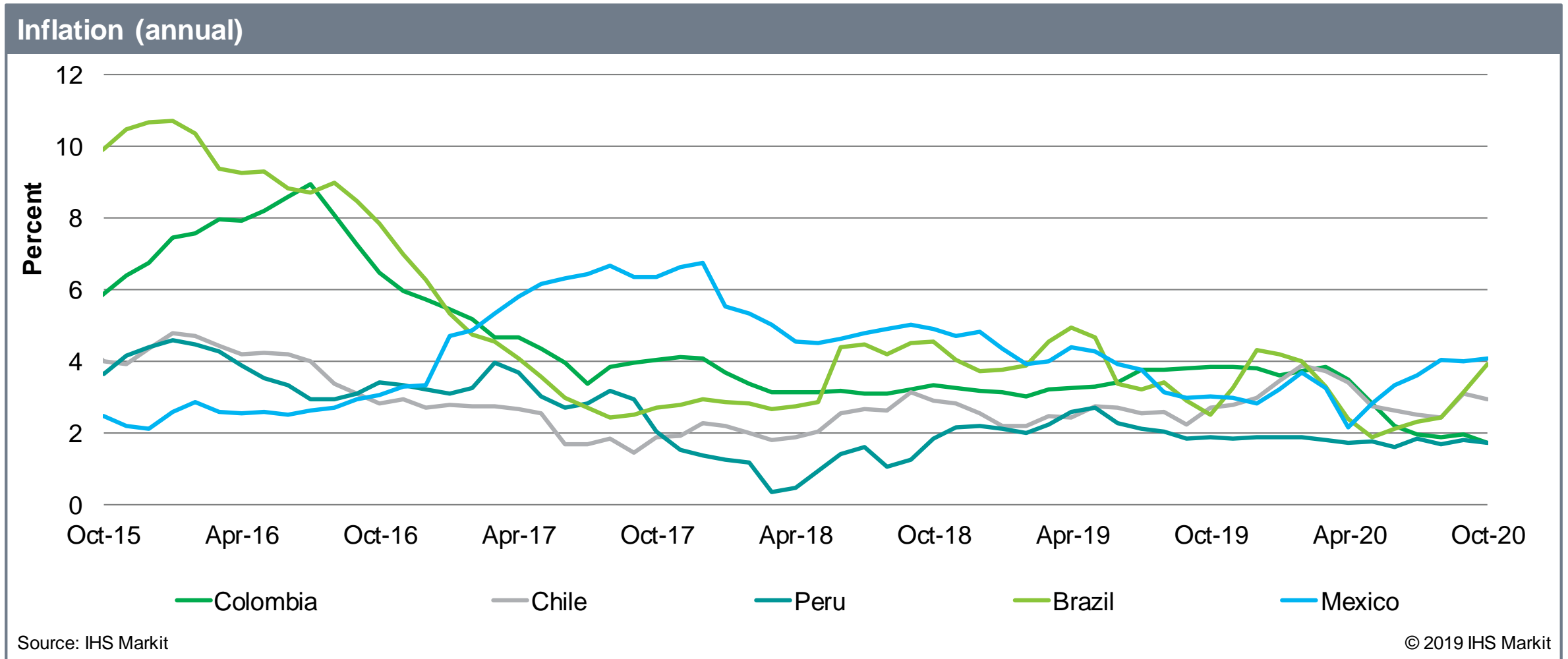


Crecimiento Real de PIB en America Latina

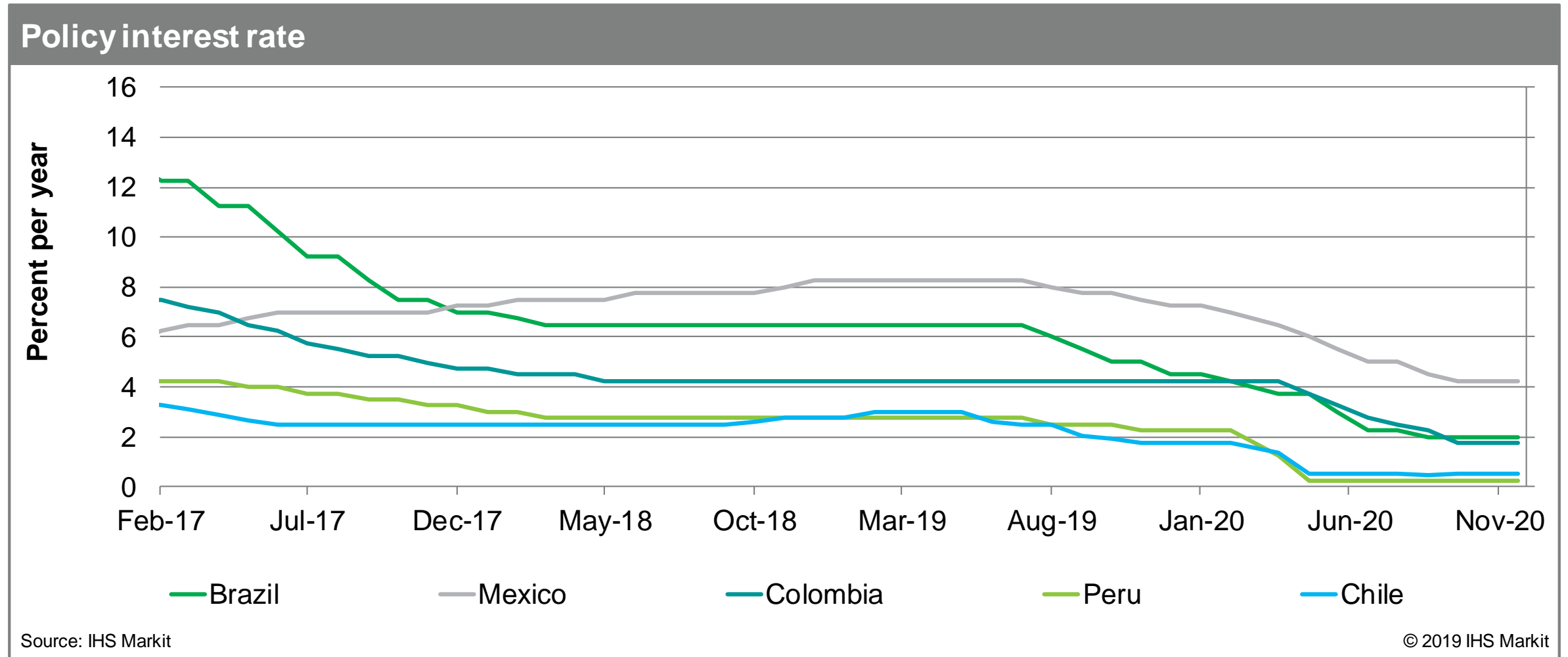


- Mexico experimenta triple shock: COVID-19, caída en precio petroleo y exportaciones flacas a EUA.
- Latino America se ha estabilizado, primordialmente a través de estímulo fiscal
 - Salvo Argentina, la region incremento sus reservas internacionales
 - Peru y Chile se recuperan de una recuperacion en precios de los minerales
 - Brasil contraresto efecto con gasto publico y evitando cuarentenas totals del pais

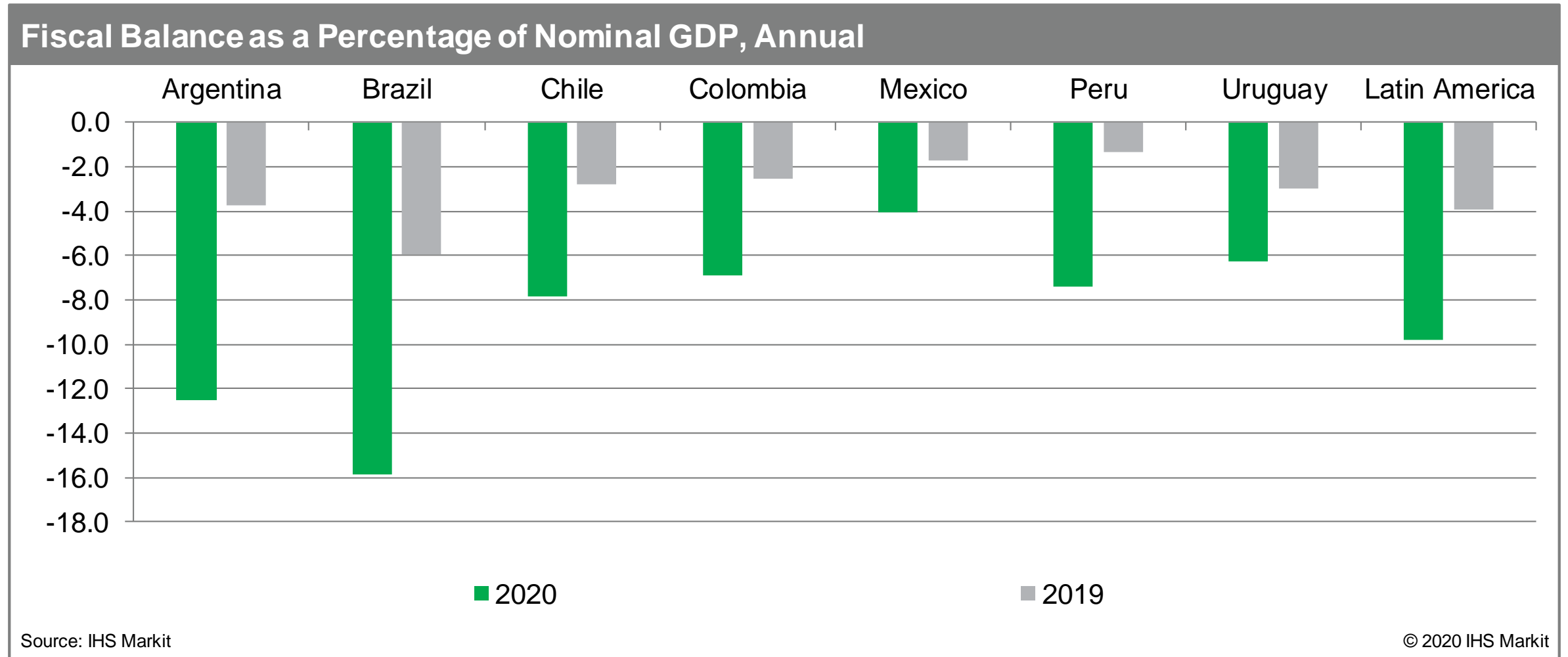
Canasta Basica genera inflacion en Brasil, Mexico y Chile



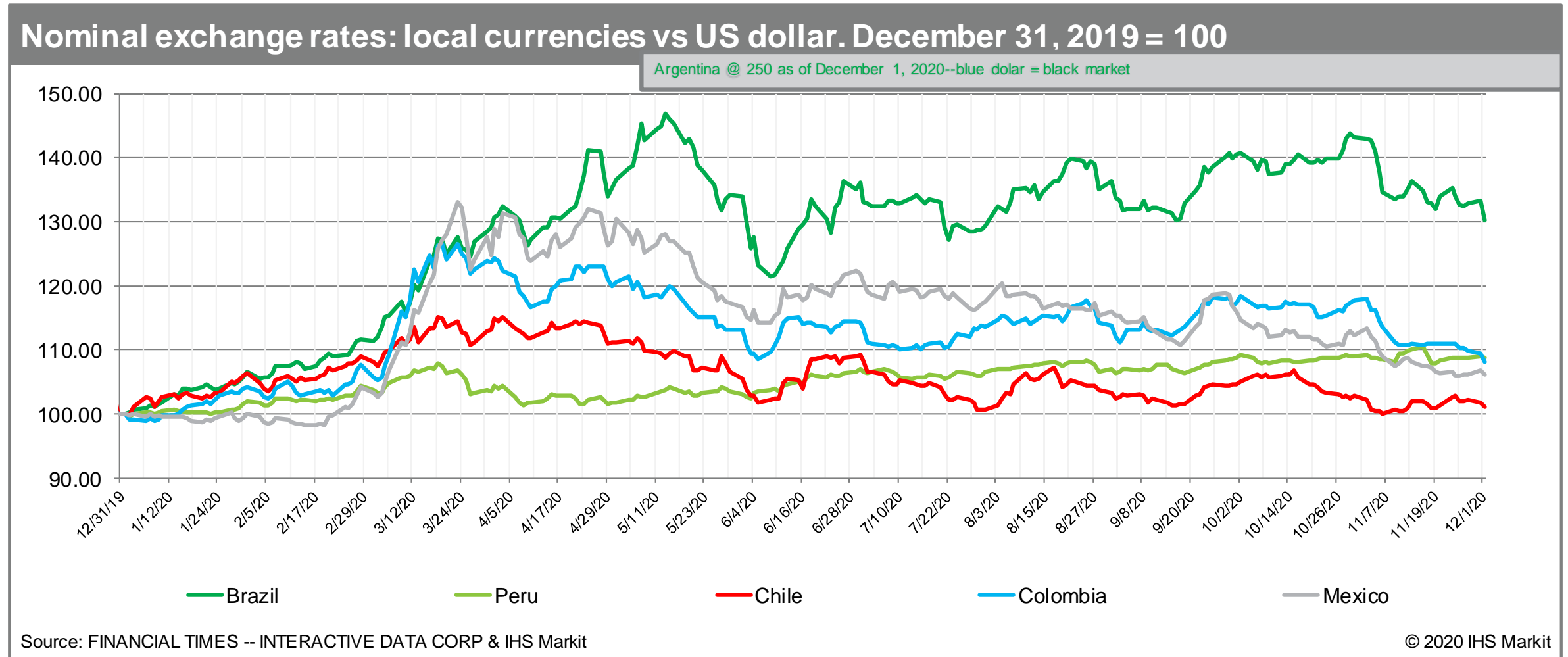
Politica Monetaria



Deficit Fiscal



Vemos estabilidad en cambios de moneda



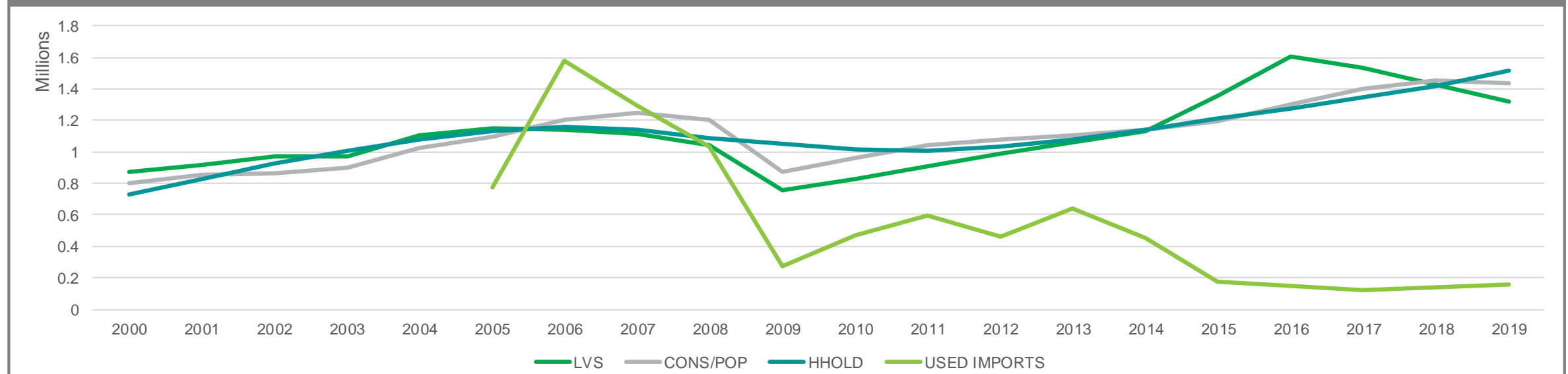
El 2021 veremos un super ciclo electoral

Country	Election type	Date
Ecuador	General Election	28 February 2021
El Salvador	Legislative Elections	28 February 2021
Peru	Presidential elections	11 April 2021
Chile	Constituent Assembly Election	April 2021
Mexico	Lower House/Governors	June 2021
Argentina	Legislative elections	October 2021
Haiti	Presidential elections	November 2021
Honduras	General Election	November 2021
Nicaragua	General Election	November 2021
Chile	General Election	21 November 2021

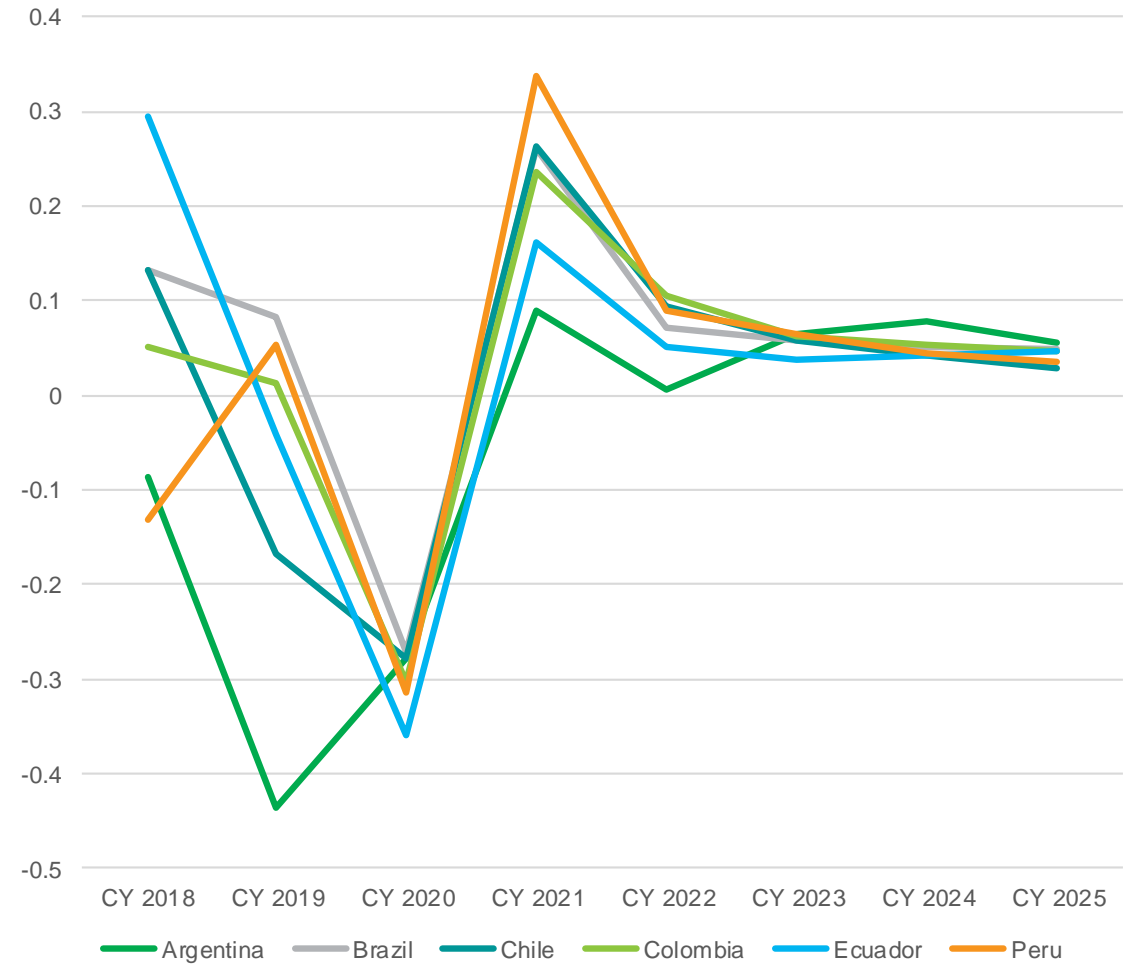
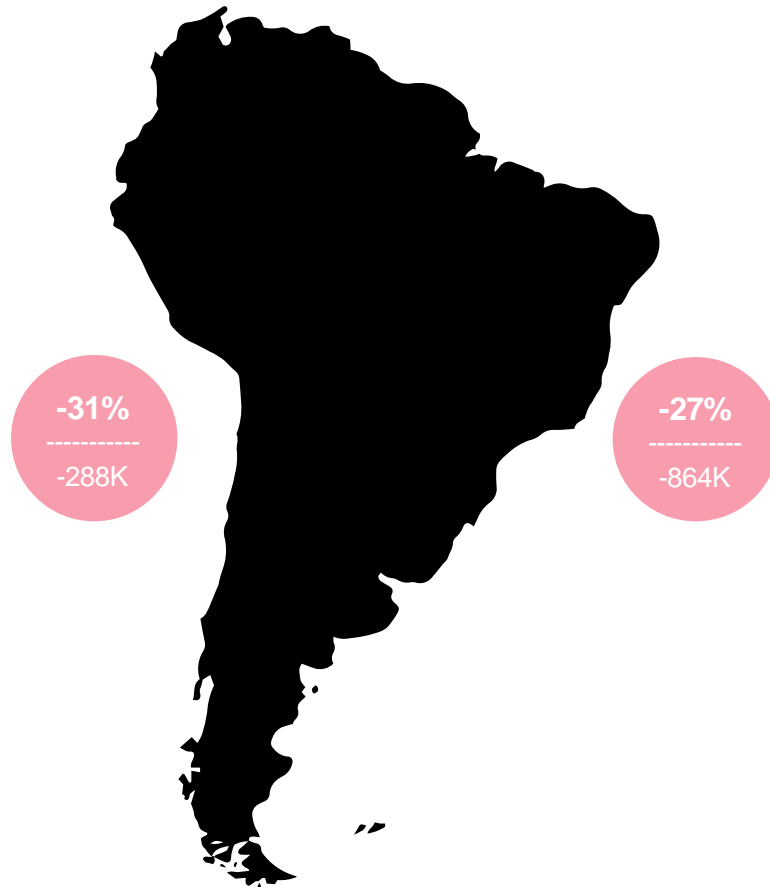
Relacion entre variables economicas y ventas de vehiculos ligeros

Country	Consump (nom)	GDP (nom)	Dispos-able Income (nom)	Profits (nom)	Employee Comp (nom)	Consump (real)	GDP (real)	Dispos-able Income (real)	Bank Rate	Exchange Rate	Labor Force	Female Labor Force	Male Labor Force	Employ	Female Employ	Male Employ	Unemploy Rate	Female Unemploy	Male Unemploy	Education Expend	Health Expend	Primary Enroll	Secondary Enroll	Tertiary Enroll	Hholds	Urban Pop	Total Pop
Mexico	19.9%	19.8%	19.2%	21.5%	24.5%	59.5%	57.9%	59.6%	3.9%	60.7%	41.6%	42.3%	41.1%	46.6%	46.7%	46.4%	6.4%	5.3%	6.9%	14.1%	15.3%	72.0%	54.9%	60.2%	44.4%	44.2%	43.5%
Argentina	70.3%	76.9%	64.7%	76.3%	73.2%	84.2%	87.1%	38.9%	0.1%	5.9%	56.0%	59.2%	50.5%	70.6%	69.9%	69.3%	78.1%	80.2%	76.4%	73.6%	70.2%	13.2%	48.7%	52.7%	62.4%	60.5%	60.1%
Brazil	83.5%	86.7%	86.7%	80.6%	68.0%	62.8%	69.9%	73.6%	63.7%	10.9%	35.1%	37.2%	32.0%	57.7%	54.9%	60.3%	87.2%	87.3%	87.0%	81.2%	74.4%	0.2%	51.1%	48.6%	40.0%	38.9%	40.0%
Chile	96.1%	96.0%	96.0%	94.1%	94.1%	89.2%	88.5%	89.5%	39.5%	1.7%	89.2%	88.7%	89.5%	90.2%	89.6%	90.5%	73.4%	67.9%	74.6%	90.0%	90.8%	0.0%	55.8%	88.2%	84.1%	83.5%	83.3%
Colombia	91.5%	91.7%	91.6%	91.6%	88.5%	74.5%	77.6%	74.9%	68.1%	0.9%	69.2%	71.5%	66.5%	74.3%	77.1%	71.1%	84.0%	88.6%	77.2%	88.8%	62.3%	30.4%	93.0%	74.3%	76.9%	74.5%	74.4%
Ecuador	60.4%	59.8%	60.4%	58.4%	59.3%	66.7%	58.3%	66.7%	24.4%	24.2%	52.2%	55.1%	47.1%	53.2%	55.0%	50.5%	40.6%	45.1%	37.7%	56.7%	53.1%	54.6%	52.7%	62.1%	54.9%	57.7%	56.9%
Peru	92.9%	94.0%	93.1%	95.1%	97.0%	86.8%	87.8%	87.2%	67.2%	38.4%	80.6%	83.4%	77.0%	84.0%	86.2%	81.2%	92.5%	80.2%	81.5%	85.5%	84.1%	63.7%	73.9%	87.7%	77.4%	76.7%	73.8%

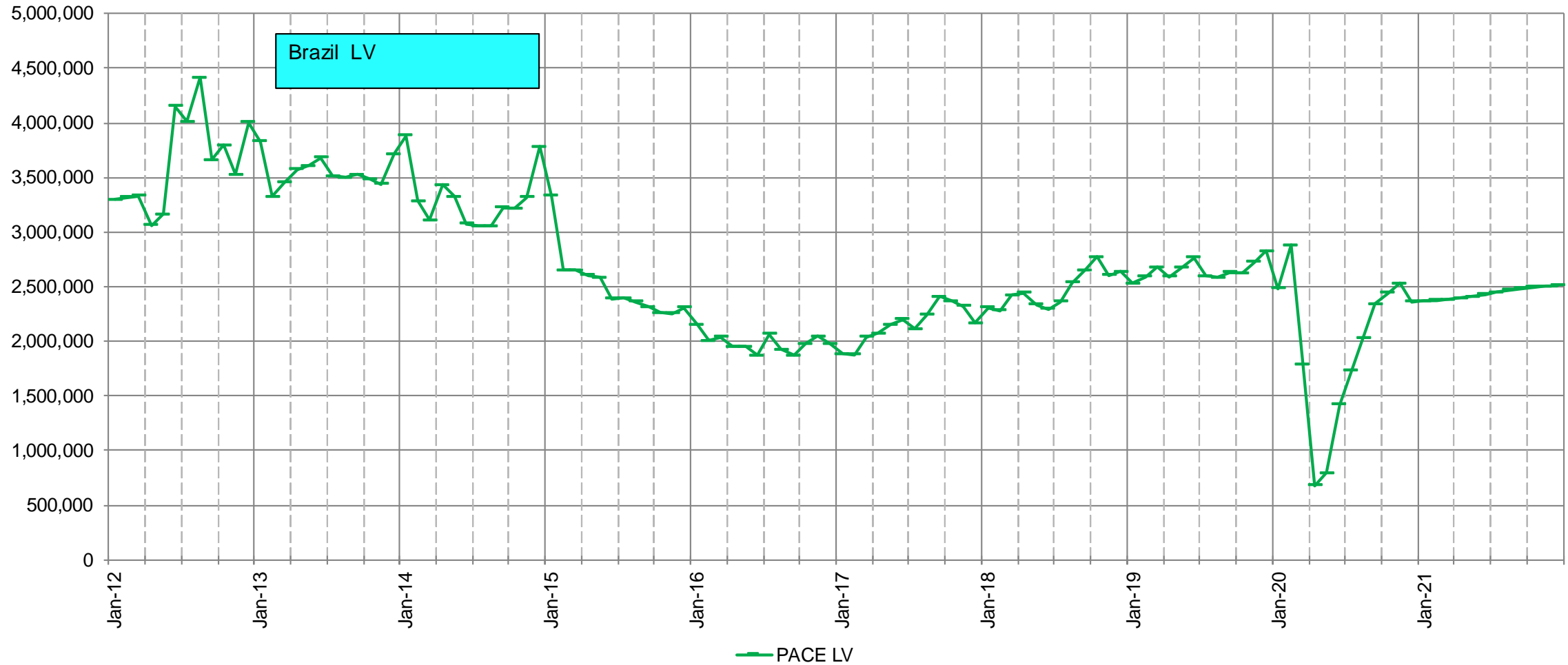
Mexico – Simulations vs Actual Sales



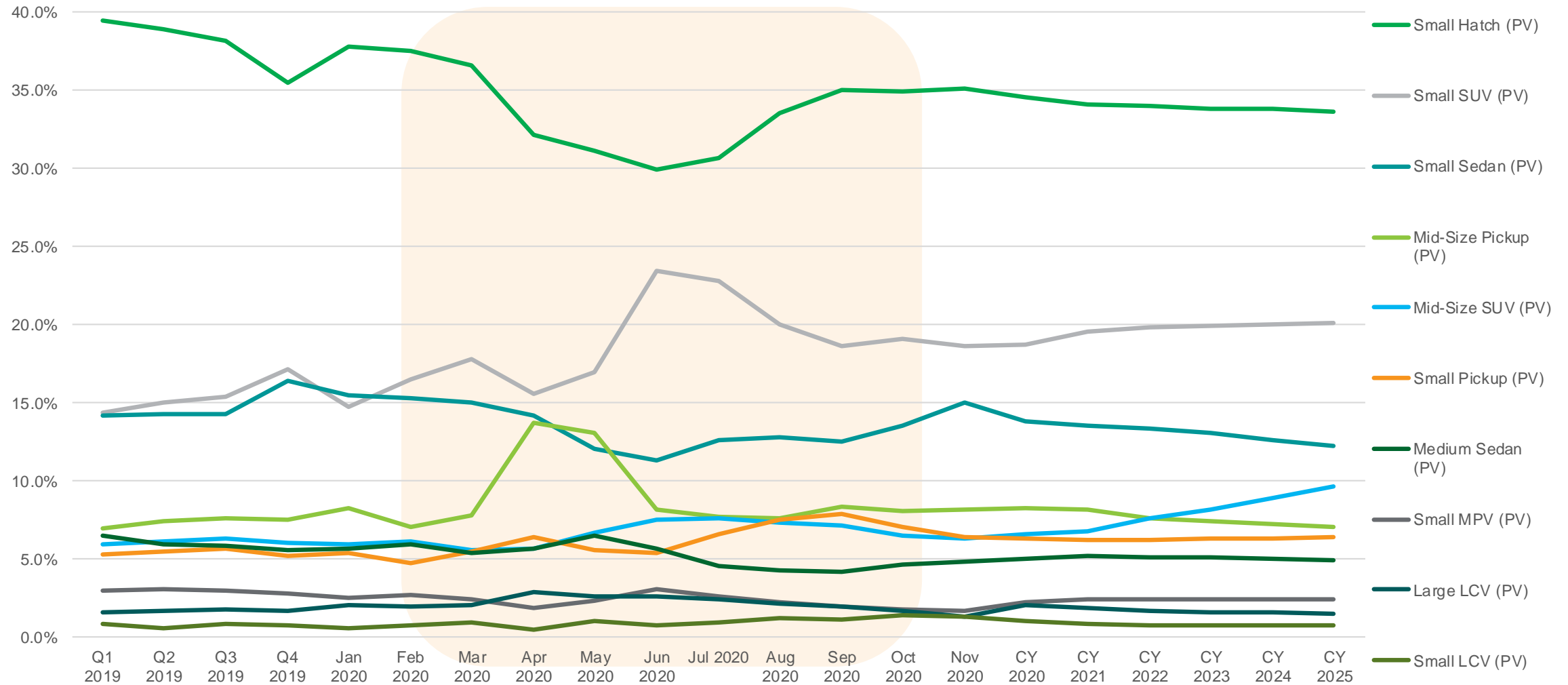
Ventas Sud America Atlantico vs Pacifico



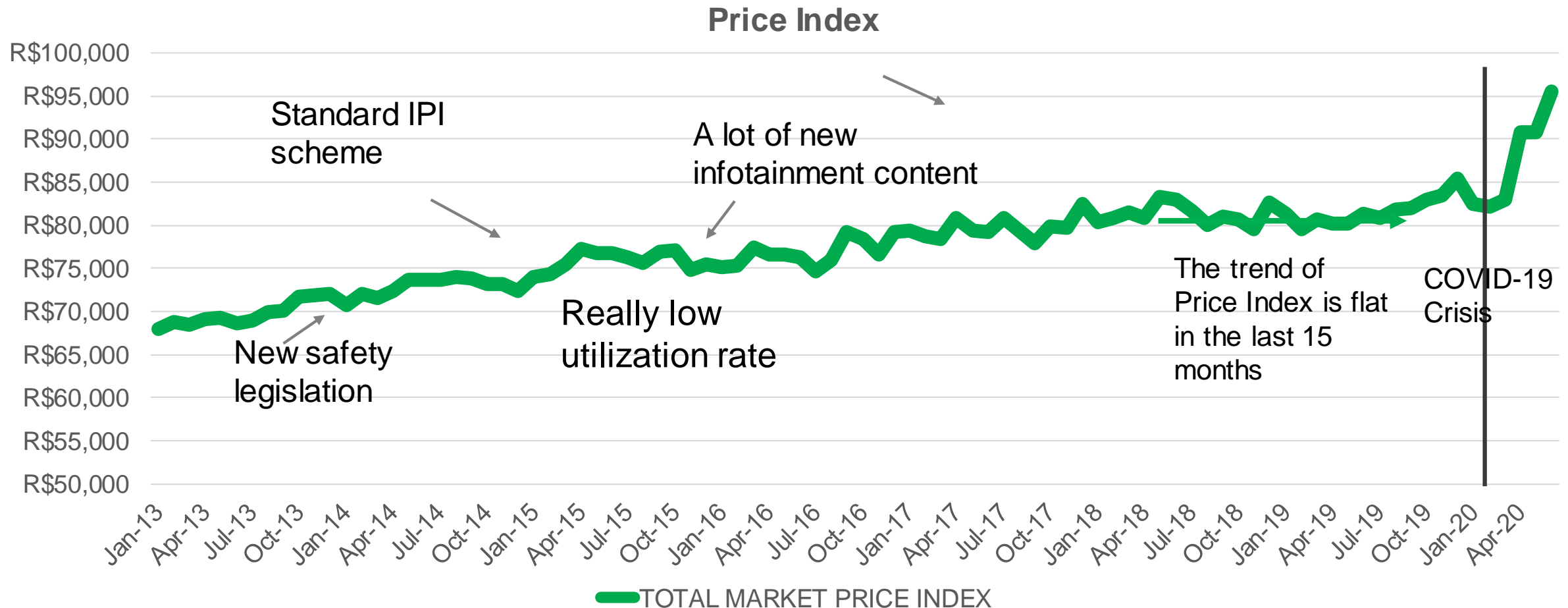
Brasil SAAR Diciembre



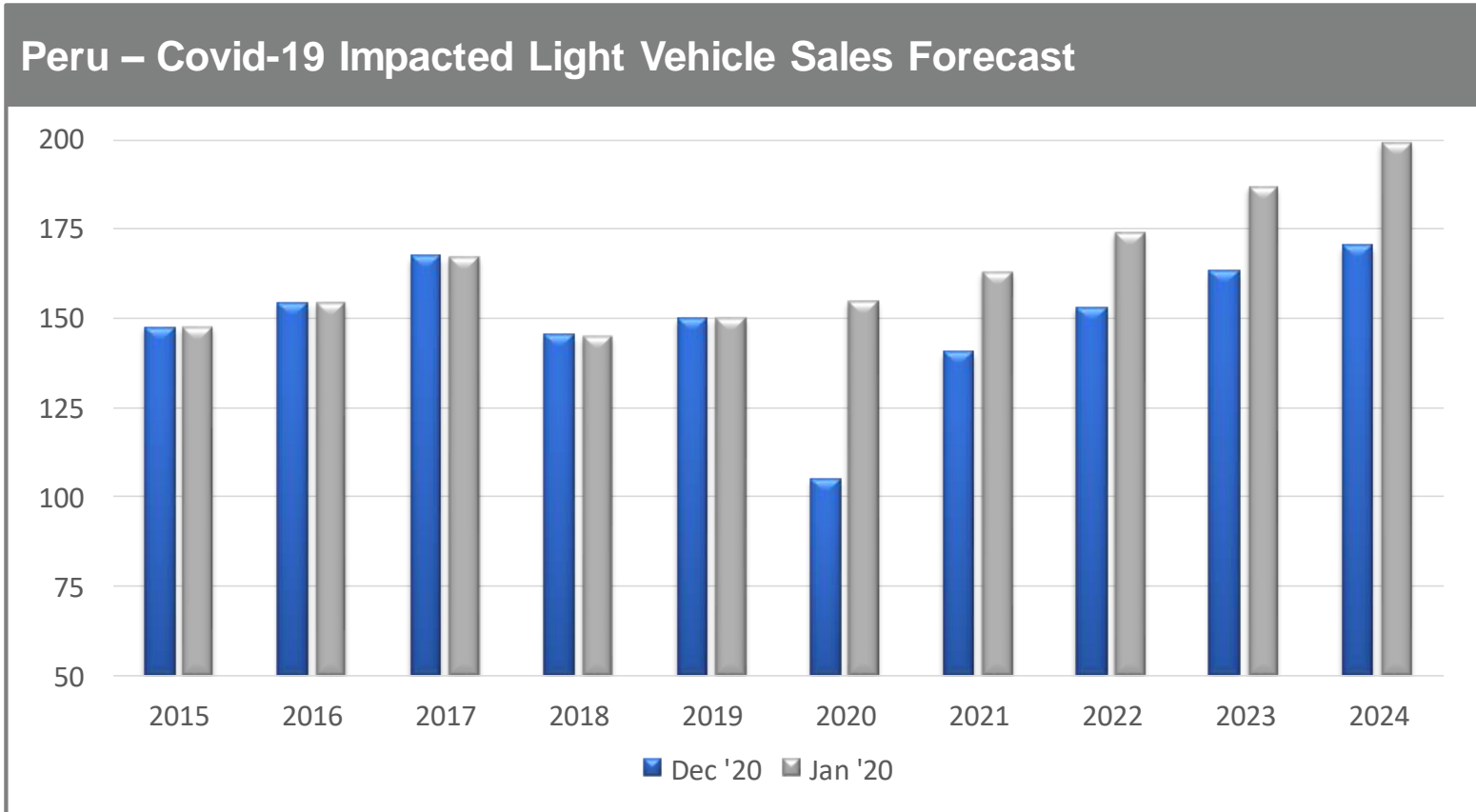
Brasil Ventas por Segmento



Brasil Indice de Precio de Vehiculos Ligeros



Perú Ventas Vehículos Ligeros Diciembre



- Anticipamos una contracción de 12% en la economía Peruana el 2020.
- Incertidumbre política alza preguntas sobre proyecciones 2021
- Estimulo monetario con el Banco Central de la Reserva del Perú reduciendo tasas a 0.25%.
- **El gobierno tiene la capacidad de emitir deuda.** Deuda publica es 24% del PIB y reservas suman 67 B de USD.
- Efecto economía informal esta siendo severo con una 20% de la población laboral actualmente inactiva

	2020	2021	2022	2023
% Growth YoY	-30.1%	33.9%	8.9%	6.6%
Vol Delta vs. Pre-Crisis Jan Forecast	-50,188	-22,474	-21,202	-23,820

Thank you! Muchas Gracias! Muito Obrigado!

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