

Brazil Autos Report Q2 2016

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Date: February 2016

Pages: 46

Price: US\$ 1,295.00 (Single User License)

ID: BEF54DCAB3EEN

Abstracts

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BMI View: Brazil's new vehicle market will remain in a declining trend in 2016 as sales fall a further 7.1%, remaining at historically low volumes. Structural adjustments in business investment and across the labour market will have the strongest impact on vehicle sales as rising unemployment and falling real wages reduce consumer incomes and encourage increased deleveraging.

Table: Key View

Consumer and business deleveraging of auto loans will continue as interest rates remain high and non-interest costs of credit rise.

Exchange rate depreciation will weigh on original equipment manufacturer (OEM) profit margins and force up vehicle prices.

Heavy trucks remain the worst performing segment, given Lava Jato's effects on heavy industry and truck demand and further falls in investment sentiment.

Export growth seen in 2015 will reverse in 2016 as devaluation of the Argentinean peso damages Brazil's export competitiveness.

Production cuts leading to industrial action amongst OEM workers, raising risks for automakers.

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