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# Opportunities in the Brazilian E-Mobility Landscape

ApexBrasil 

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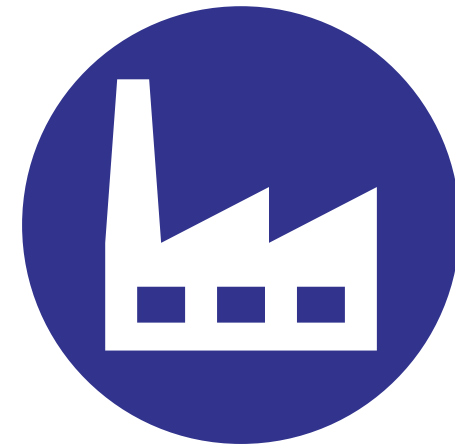


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# Why Brazil?



**8th** world vehicle producer  
**6th** domestic market



**65** industrial units



**1.3** million of direct  
and indirect jobs



**26** manufacturers

Among the 3 major  
producers\* in Latin America,  
Brazil is responsible for

**4 in 10 vehicles,**

and accounts for

**1/2 of the sales**

in the region





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# What about the electric vehicle?

**“This decade will be the most disruptive in the history of the automotive and mobility sector”**

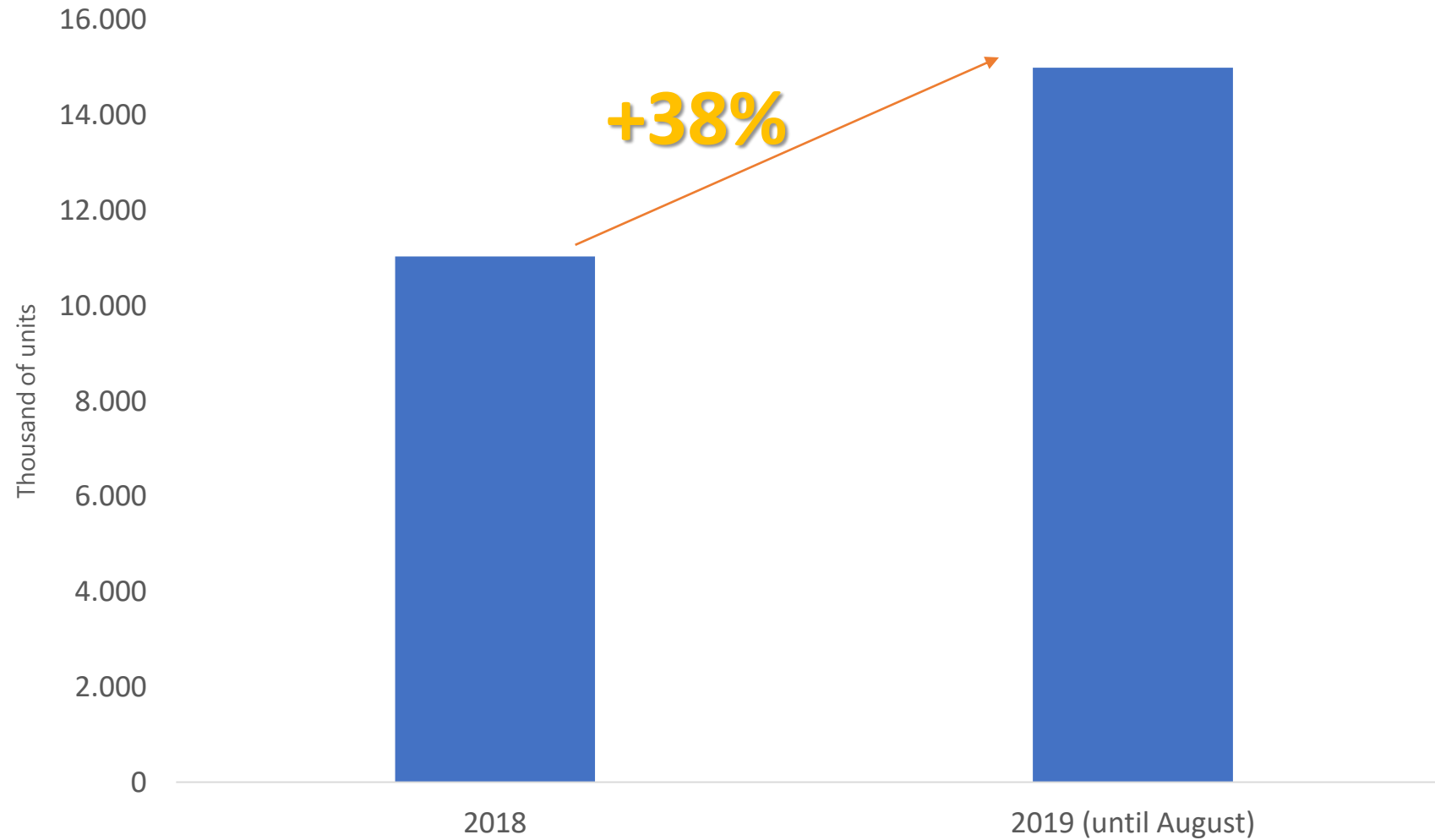
Luis Carlos Moraes, President of the Brazilian National Association of Vehicle Manufacturers (Anfavea)



**In building the future business ecosystem of the Brazilian automotive industry it is imperative to establish partnerships with startups.**



# EV Units in Brazil



Source: National Association of Brazilian Auto Parts manufacturers (Sindipeças), Brazilian National Association of Vehicle Manufacturers (Anfavea), Boston Consulting Group (2019)



## 90% of consumers say they would like to find electric cars available for purchase.



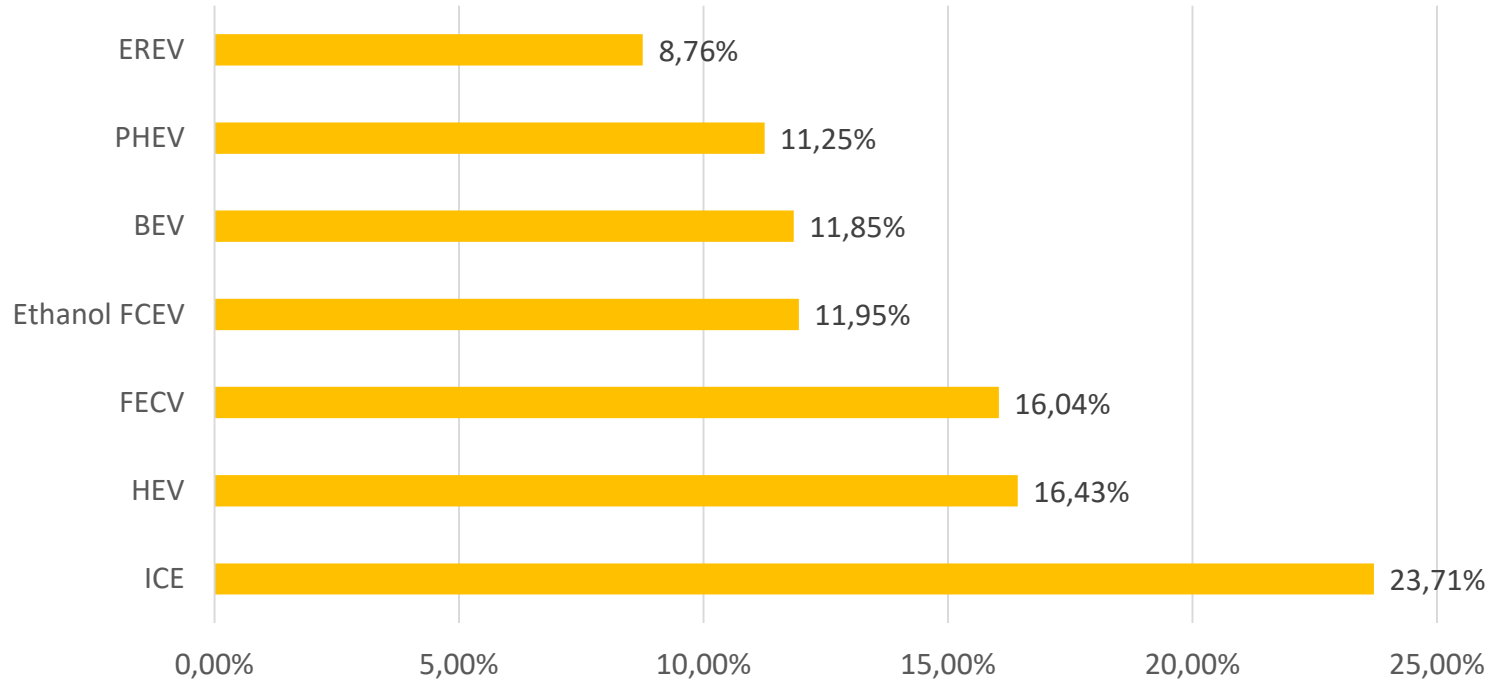
We have accompanied massive investments in development of electric vehicles worldwide, but the initiative is still small in Brazil. Would you like to have electric vehicles available for purchase in Brazil?





What kind of vehicle would you like to purchase in the next 5 years?

**76,29%** of **consumers** would like to buy an electric car in the **next 5 years**



Source: KPMG – Global Automotive Executive Survey (GAES) – Brazilian Chapter  
<https://assets.kpmg/content/dam/kpmg/br/pdf/2019/06/gaes-br-2019-eng.pdf>

**2030: 5%** of the fleet

**180 thousand  
vehicles/year**

**400 thousand  
charging stations**

**2 million vehicles**



# Brazil

- **Size**

- Large metropolitan markets  
**x** small remote cities
- Established biofuel  
production chain for  
flex fuel and **ethanol** vehicles



Source: Fundação Getúlio Vargas - Electric Vehicle Book

[https://fgvenergia.fgv.br/sites/fgvenergia.fgv.br/files/caderno\\_carros\\_eletricos-fgv-cap\\_a\\_ing\\_-\\_completo\\_-\\_rev2.pdf](https://fgvenergia.fgv.br/sites/fgvenergia.fgv.br/files/caderno_carros_eletricos-fgv-cap_a_ing_-_completo_-_rev2.pdf)



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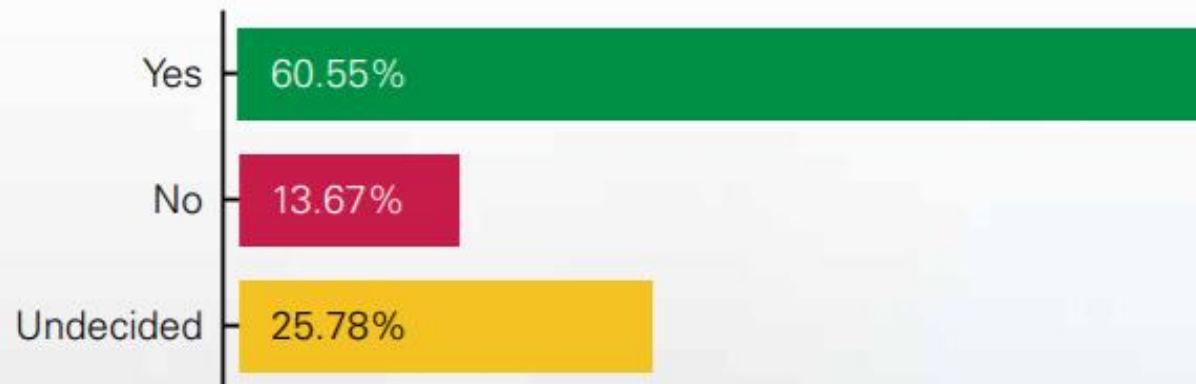
## Tax incentive

**R\$2.1 billion**  
(2019)

**R\$1.5 billion**  
(annually until 2030)



**Will the R&D investment incentive in Brazil within the scope of ROTA 2030 encourage the approach of automotive industry with startups and university research centers?**



Source: KPMG – Global Automotive Executive Survey (GAES) – Brazilian Chapter  
<https://assets.kpmg/content/dam/kpmg/br/pdf/2019/06/gaes-br-2019-eng.pdf>

# Opportunities in the Brazilian E-Mobility Landscape

Where are the **opportunities in Brazil** for you?

## Giant market

Around  
50 million  
vehicles



## Early adopters

Consumers keen  
on adopting  
innovation



## Huge concentration of OEMs



## Government Incentive

Rota 2030



And who can help you?

# Our services

- Information about the **business environment**
- **Soft landing** in Brazil
- Strategic overview on **investment opportunities**
- **Economic data** and projections
- General information on **rules and regulations**
- Information about **regulatory agencies**
- Building the **right connections** with public and private institutions
- Identification of competitors, **potential partners** and suppliers
  - **Companies or startups** according to your investment profile
- Our services are all **free of charge**



# Thank you!



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