

AutoData

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Delivery Express is the arrival of MAN in the light segment

Man will debut in the light commercial vehicle segment with PBT up to 3.5 tonnes with Delivery Express, which begins to arrive in the dealerships next week, according to Ricardo Alouche, its vice president of sales, marketing and after sales of the company:

[More on pg. 6](#)

**Hella expects R\$ 100 million
in revenue this year**

[More on pg. 4](#)

**April sales reach
217 thousand**

[More on pg. 8](#)

**Imported vehicles sell 43.9%
more in Jan-Apr**

[More on pg. 10](#)

AutoData Seminar

REVISION OF THE PERSPECTIVES 2018

JUNE 25

08h00 to 17h30
WTC São Paulo



THE RETURN OF THE POSITIVE NUMBERS

The automotive sector is already celebrating the return of positive production and sales statistics. It is a recovery moment. And knowing exactly what the new trends are projected across all segments and being able to plan for the new market demands in this second half will be vitally important to business from now on.

AutoData invited 23 important executives from the automotive sector to the traditional Revision of the Perspectives (Revisão de Perspectivas) seminar to discuss this new and important business environment we are already living in Brazil.

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CHECK BELOW WHO ARE THE EXECUTIVES(*) INVITED AND MAKE YOUR REGISTRATION FOR THIS IMPORTANT SEMINAR OF AUTODATA:



Antonio Megale
President of Anfavea



George Rugitsky
Counselor of Sindipeças



Roberto Cortes
President of MAN



Marco Silva
President of Nissan



Ana Theresa Borsari
General Manager of Peugeot/Citroen



Miguel Fonseca
Vice - President of Toyota



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Antônio Baltar Jr.
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Roberto Marques
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Luis Pasquotto
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José Eduardo Luzzi
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(*) Executives still subject to confirmation.

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Hella expects R\$ 100 million in revenue this year

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Hella completes two years of national production of components for OEM and replacement and search in 2018, until December, to register invoicing of R\$ 100 million, which would be the biggest of its history here. To reach this amount, however, depends in part on the developments of Rota 2030, the new industrial policy for the automotive sector, regarding tax incentives for the application of electronic security items, where the company operates.

According to Carlos Eduardo Bertozzi, its general director, there are intentions of the parent company to invest in the Brazilian operation, but waiting for a long-term policy can delay the budget: "It is a reality of the whole market. In our case the directors, in Germany, see potential market growth that still has a low index of vehicles per capita. But what defines the contribution is the predictability of the country".

The executive pointed out that a positive scenario for the company's business here would be tax incentives that would make feasible the nationalization of electronic components. In the case of Hella from Brazil this would mean the opportunity to sew local contracts with manufacturing companies that today import their components to equip new vehicles:

"Companies are exposed to foreign exchange, and favorable conditions to local production would reduce the risks of the dollar rising".

Today the Hella product mix in the Brazilian market is divided into three parts: electronic modules, headlights and aftermarket. About 60% of the portfolio is imported, with local production being maintained at a factory in Indaiatuba, SP, to meet the demands of Volkswagen and FCA, companies which Hella has a contract with.

It was a contract to supply a comfort module for VW vehicles that motivated the company to produce locally in its own facility: in 2011, it entered into a partnership with Emicol - a company based in Itu, SP, which operates in the field of household appliances - to assemble the first modules for VW while looking for ways to operate its own unit:

"With the fall of the domestic market we had to negotiate with the matrix inputs to locate the production independently of what happened in 2016".

With the investment directed to the company tried to seek new customers to occupy the factory of 5 thousand square meters and capacity to produce around 8 thousand components per day. It was when the company won competition to be a supplier of FCA fuel pump modules.

Although it closed the contracts with the two manufacturers Hella had to sustain its production with the high demand of the spare market. Bertozzi says that as a result of the resumption the company has been gradually occupying the factory: "Today we are operating with 20% of our installed capacity, and there is room for much more, but we depend on macroeconomic factors".

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Delivery Express is the arrival of MAN in the light segment

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Man will debut in the light commercial vehicle segment with PBT up to 3.5 tonnes with Delivery Express, which begins to arrive in the dealerships next week, according to Ricardo Alouche, its vice president of sales, marketing and after sales of the company:

“The desire to participate in this segment has been around for a long time, but we had not been able to make it viable with the old Delivery. But, with the development of the new cabin, we have put that condition since the beginning”.

MAN has already sold 250 units of the new model, 150 for dealers, with the intention of having at least one unit per point of sale, and expects the first orders to be made this month.



According to Alouche, MAN's smallest truck has a 5T PBT, so when customers require a smaller model they would eventually buy it with another competitor.

"But now this will change. This segment is very important because we have customers that need to run in tight urban centers and Delivery Express meets this demand. Another issue is that models with PBT up to 3.5T can be driven by people with a driver's license B".

Coming to a new segment, Man already looks at his competitors: "We want to attract customers who once looked at models like Mercedes-Benz Sprinter, Iveco Daily and Ford F-Series, not forgetting the public who used to buy Asian models with a capacity of 2.5T and 2,8T and that can migrate to a slightly larger vehicle".

The target audience for this model is separated into two categories by Man: the first is the large companies that require flexibility and agility in deliveries, with liberation to move in restricted areas, such as logistics and distribution. The second is a large mass of customers who are small retailers and owners of small and medium companies, that do not have the need to make deliveries but need a model capable of transporting their work material.

The engine is the same as the 6T model, Cummins 2.8 engine 150 hp and six-speed manual gearbox. Because it is considered a light commercial by legislation, the model is equipped with airbags and disc brakes.

Man's projection is to sell 150 units per month. Being a new segment Alouche recalled that the company made a significant investment in training for dealers, which took months - but it is believed that resale employees are fully capable of selling and servicing customers in after sales.

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April sales reach 217 thousand

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Vehicle sales in April reached 217.9 thousand units, according to Renavam data. The volume sold in the 21 business days of the period was 38.5% higher than the one registered in April last year, when the market operated in a shorter period, eighteen business days, and sold 156.9 thousand units.

Only on Friday, 27, the sales effort exerted in retail culminated with 16 thousand vehicles sold. On Monday, 30, the last day of the month, minor performance: something of 6 thousand units sold.

In comparison with March's commercial performance, when the sector sold 207.4 thousand, the market registered a 4.8% increase in the volume of license plates. Last month also had 21 business days.

In the accumulated of the year the performance surpasses the first four months of 2017, with 762 thousand 449 vehicles up to April, a 21.3% increase compared to the result from January to April 2017, when the sector sold 628.9 thousand units .

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Imported vehicles sell 43.9% more in Jan-Apr

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Abeifa, which represents importers of vehicles, released its April sales balance on Thursday, 3, and registered 3 thousand 237 units, up 58.4% compared to the same period last year. It fell 6.4% compared to last month. According to President José Luiz Gandini, “small variations from one month to the other are normal and do not have a specific reason”. Year-to-date importers sold 11 thousand 696 vehicles, up 43.9% from 8 thousand 128 units in the first four months of last year.

“As I said before, there will be no boom in imported vehicle sales, even with the end of Inovar-Auto, of 30 percentage points and quotas limited to 4 thousand 800 units per year”, Gandini said. “Factors such as the process of recovery in the market and the rise of the dollar help to cool the sales of the associates”.

For the year Abeifa’s projection is to sell 40 thousand units, considered low by Gandini: “Associated brands are reborn in Brazil and we lost many points of sales and, for this, we made a more conservative projection, which will represent 1.7% of the total market, based on

the indicators of Anfavea and Fenabrave”.

The five top-selling brands in the four-month period were Kia, 4 thousand 115 units, Volvo, 1 thousand 631, Jac Motors, 1 thousand 430, Lifan, 959, and BMW, eight hundred. The volume related to BMW considers only the imported models, since most of the volume that the company sells here is of its national models.

Concessionaires – Abeifa’s projection is that its associates 50 new concessionaires by December, sixteen have already been inaugurated. If this happens, the imported network will reach five hundred points of sale.

Jobs – With the opening of the new concessionaires, those associated with Abeifa have already hired 245 new employees, Gandini said they expect to reach 5 thousand new jobs by the end of the year, reaching 20 thousand direct collaborations: “But the generation of jobs from of importers will be even greater throughout the year, because for each employee directly hired, two or three indirect vacancies are generated”.

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Obviously it will also bring the complete datasheets of all the chassis and bodywork manufactured by each of these companies

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Job vacancies in the automotive sector grow 30% in Jan-Mar

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Job creation in the automotive sector increased 30% in the first quarter compared to the same period last year, according to a study by Robert Half, a company specialized in labor recruitment. According to its recruiting manager, Isis Borge Sangiovani, the increased demand for professionals in the automotive sector “confirms the market resumption and optimism about the current and future labor market”, recorded in the third Índice de Confiança (Trust Index) edition.

The study showed the areas that needed more professionals in the quarter and the reason companies hired in the period, such as the supply chain area, which hired more because it is directly linked to the strategic results of companies. The professionals that the companies look for

in this area were supervisors and logistic analysts, supervisors and analysts of PCP and purchasing managers.

The project area has also opened up new job vacancies for managers because of the resumption of investments in new company projects, whether in relation to products, factory renovations or even factory expansions.

In the area of manufacturing, new vacancies have also arisen because companies have reduced production volumes to the maximum to cope with the downturn, and with the resumption, investments and hiring in this area will be necessary.

Other areas were also mentioned in the study as responsible for the growth of vacancies in the automotive sector, such as company control and technical sales.

«We used information from automakers, systemist companies and suppliers that realized the demand for more professionals in the same areas. We believe that the second half of the year will be even more heated in the generation of new jobs, just like 2019».

With the recovery of the market the expectation of Robert Half is that new vacancies appear in the market: «The companies are looking for professionals in the area of sales and, soon, we will see new jobs in the area of after sales, because one thing leads to another».

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