



Impulsionando o Futuro: Tendências que estão transformando o aftermarket automotivo

Driving the Future: Key Trends Shaping the Automotive Aftermarket

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President and CEO, Auto Care Association



nós representamos
we represent

Nossa missão é proteger e promover os interesses das empresas que oferecem produtos e serviços para o *aftermarket* automotivo, atendendo a todos os tipos de veículos automotores.

***Our mission** is to protect and advance the interests of businesses providing aftermarket products and services for all classes of motor vehicles.*

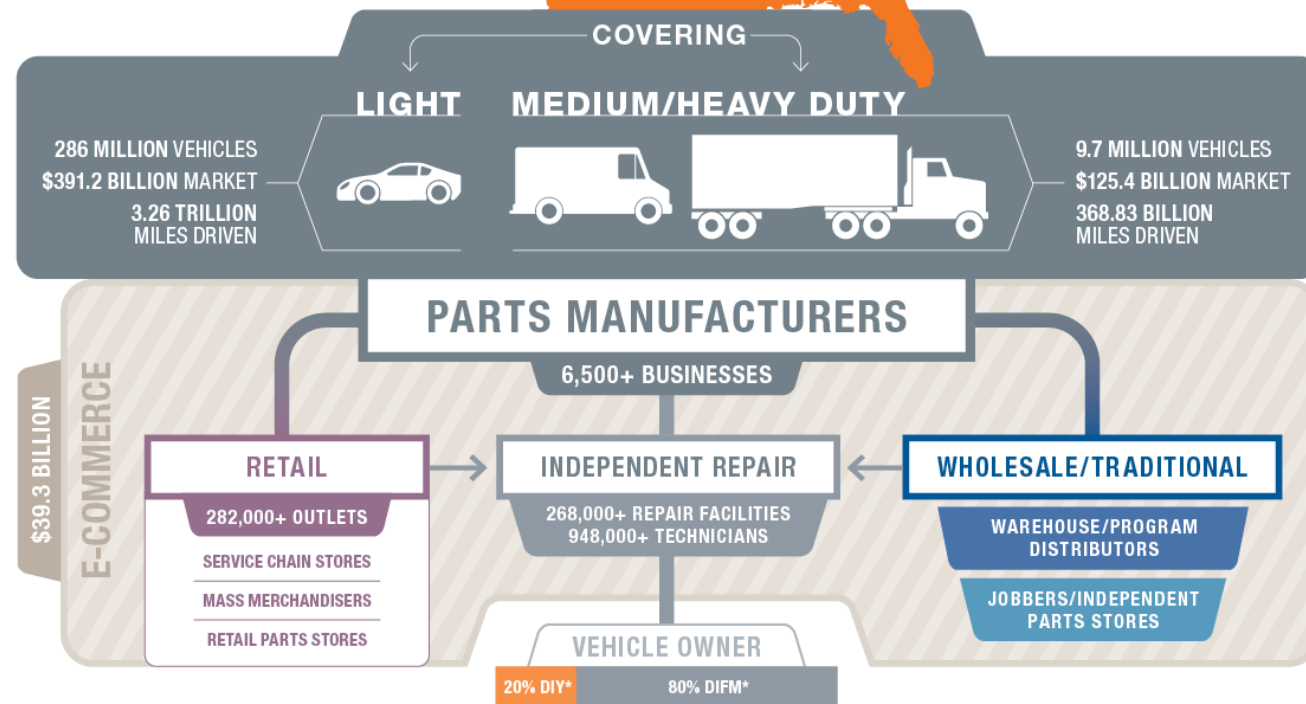
Visão Geral da Indústria nos EUA



GLOBAL > 1.57 BILLION VEHICLES > \$2.33 TRILLION > 12.1 TRILLION MILES DRIVEN

OVERALL U.S. INDUSTRY

\$516.6 BILLION 557,000+ BUSINESSES 4.97M PROFESSIONALS





DRIVING HOME THE NEED FOR RIGHT TO REPAIR



IMPULSIONANDO A NECESSIDADE DO DIREITO DE REPARAR



of shops surveyed rank right to repair as their top issue^[1].

das oficinas pesquisadas, priorizam o direito de reparar.



of shops surveyed experience issues accessing repair data daily or weekly^[2].

das oficinas pesquisadas relatam problemas de acesso a dados semanalmente ou diariamente.



of shops surveyed send up to 5 vehicles to the dealer each month due to data access issues^[3].

das oficinas enviam até 5 carros por mês para a concessionária por problemas de acesso aos dados.

\$3B



is lost annually from local businesses and consumer pockets due to vehicle diagnostic/code issues^[4].

são perdidos anualmente devido a problemas de diagnóstico.

^[1] Hanover study: 84% (45% extremely important + 39% very important); Babcox study: 87% (63% extremely important + 24% very important) ^[2] From Hanover Research study ^[3] Hanover study: 51%; Babcox study 60% ^[4] Based on applying the average number of vehicles that shops in the study send to the dealer each month due to vehicle repair data access issues, the national average for labor and parts costs associated with diagnosing a "check engine light", and the number of independent shops nationwide. Based on a survey of 783 independent repair shops.

*A LEGISLAÇÃO DO DIREITO À REPARAÇÃO
ESTÁ DE VOLTA*

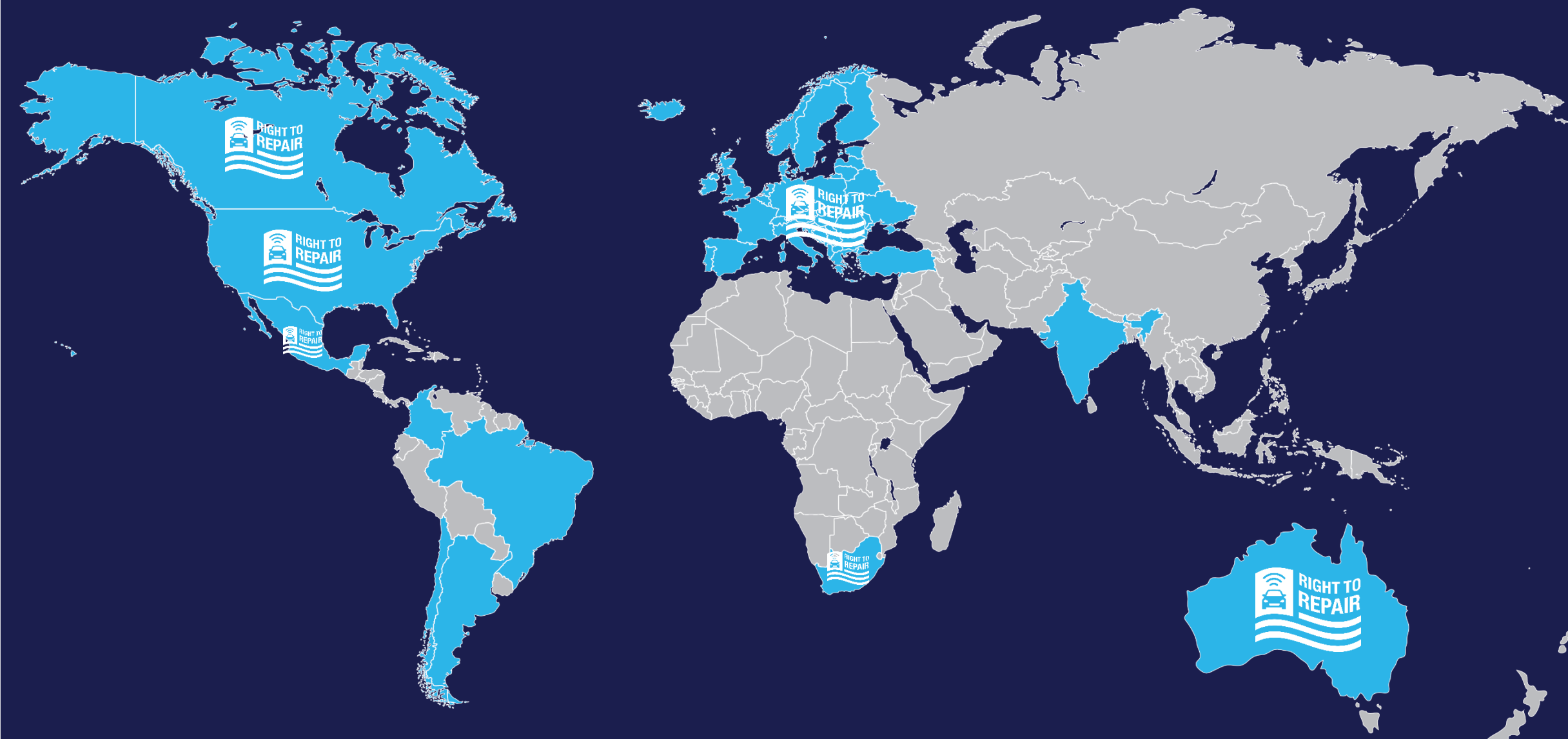


REPAIRACT.COM

REPAIR Act IS BACK

HR 1566

Associations in Motion: O Direito à Reparação no Nível Global



The background of the slide features a complex financial market visualization. It includes multiple overlapping candlestick charts in shades of blue, green, and orange. Several trend lines are drawn across the charts, including a prominent white line with a dot at its end and a red curved line. Numerical data points are scattered throughout, such as 4096.56, 3010.33, 2147.54, and 437.55. The overall color scheme is dark blue with highlights from the chart elements.

*Tendências que estão
transformando o aftermarket
automotivo*

*Key Trends Shaping the U.S.
Aftermarket*

Tecnologia

Technology

- *Combustíveis Alternativos / Adoção de Veículos Elétricos*

Alternative Fuels/EV Adoption

- *Comércio Eletrônico*

E-Commerce

- *SOTA (Reparos por Software Remoto)*

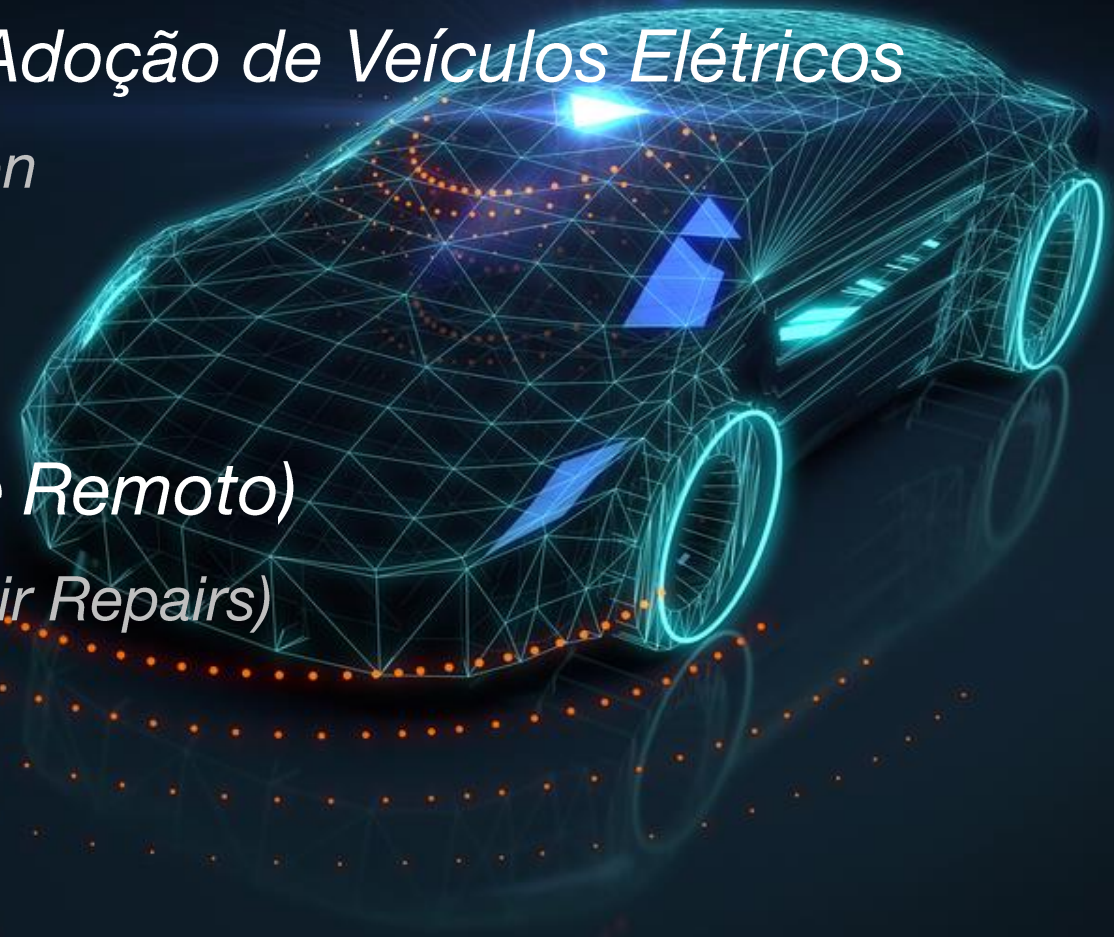
SOTA (Software-Over-The-Air Repairs)

- *Veículos Autônomos*

Autonomous Vehicles

- *IA na Indústria Automotiva*

AI in the Auto Industry



Tendências de Veículos Elétricos

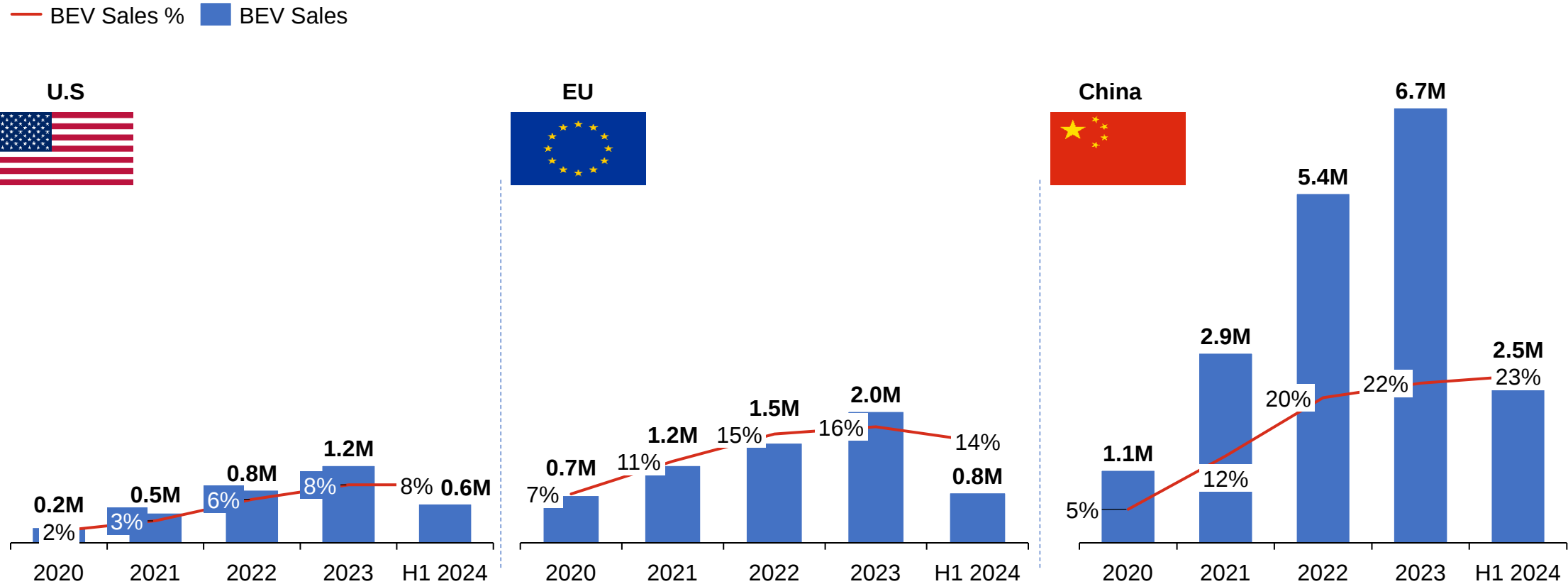
EV Trends

Adoção de veículos elétricos a bateria (BEV) se manteve estável nos últimos 2 anos ao nível global

Across global markets BEV adoption has plateaued in the last 2 years

TENDÊNCIA DE VENDAS E ADOÇÃO DE BEV – GLOBAL

BEV SALES AND ADOPTION % TREND - GLOBAL

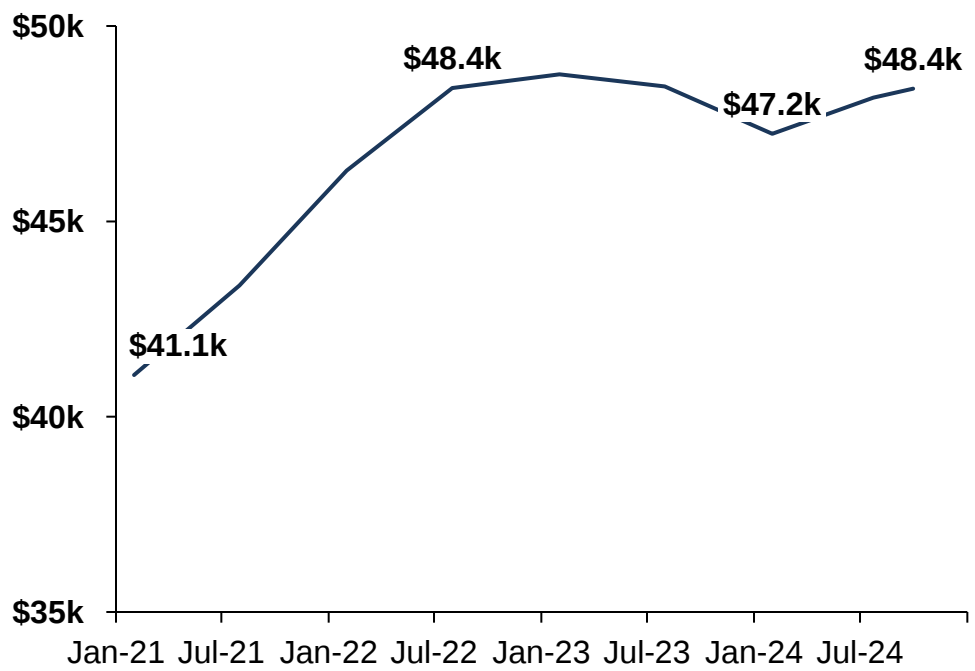


Source: Strategy& Research, Cox Automotive publications on car sales in U.S.

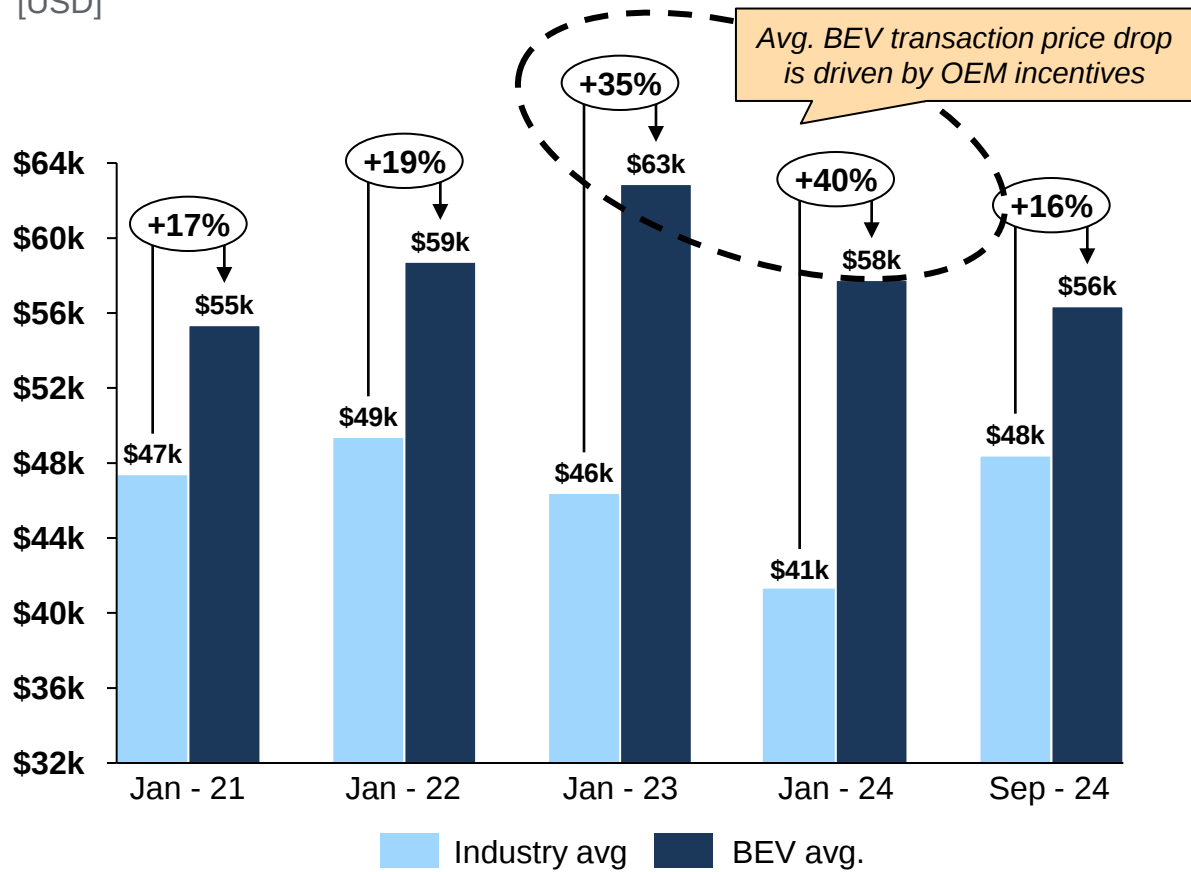
Aumento de custos em 2024; os BEV são 15% mais caros

Costs rise in 2024 and BEVs are at least 15% more expensive

VALOR MÉDIO DE TRANSAÇÃO DE VEÍCULOS NOVOS
AVERAGE TRANSACTION VALUE FOR NEW VEHICLES
[USD]



VALOR MÉDIO DE TRANSAÇÃO: BEVS VS INDÚSTRIA
AVERAGE TRANSACTION VALUE, BEVS VS INDUSTRY
[USD]



Source: Cox Automotive – KBB, Strategy& Analysis

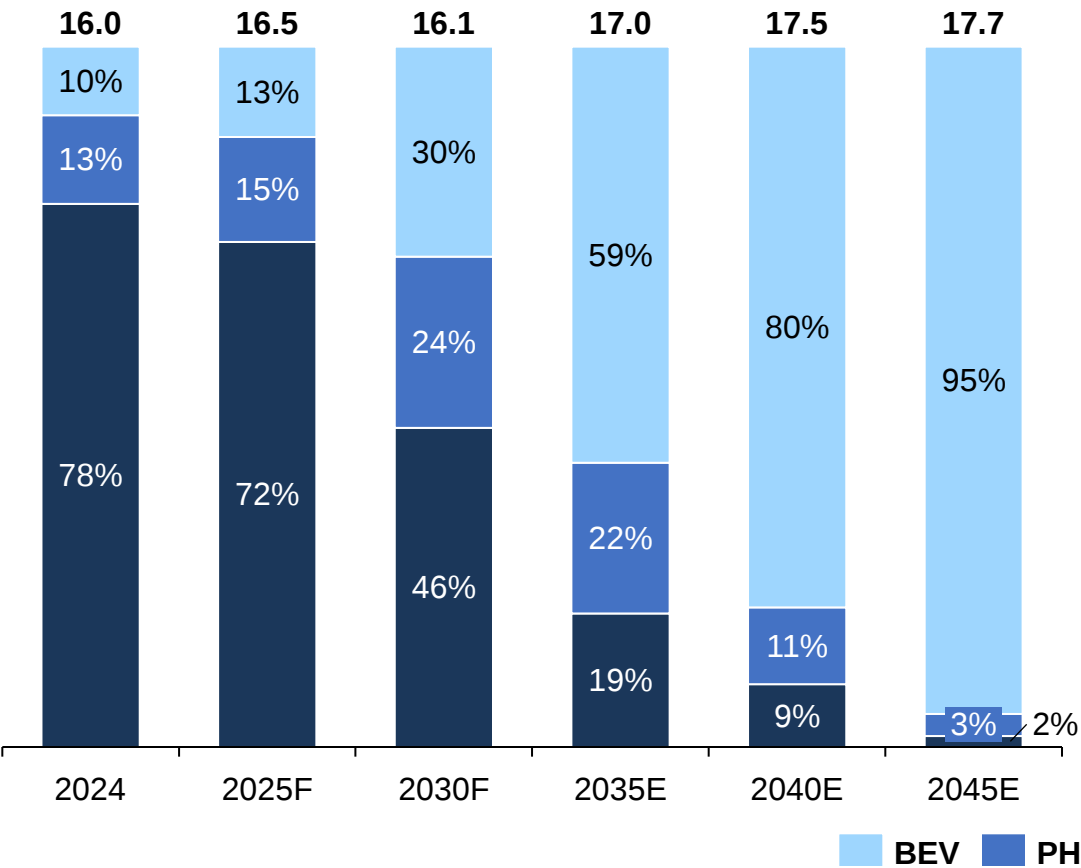
Híbridos facilitam a transição para BEVs; a frota de veículos continuará dominada por motores a combustão (ICE) até 2040

Hybrids provide transition to BEV; parc will continue to be dominated by ICE until 2040

2024-2045F VENDAS POR TIPO DE PROPULSÃO

2024-2045F SALES BY PROPULSION TYPE

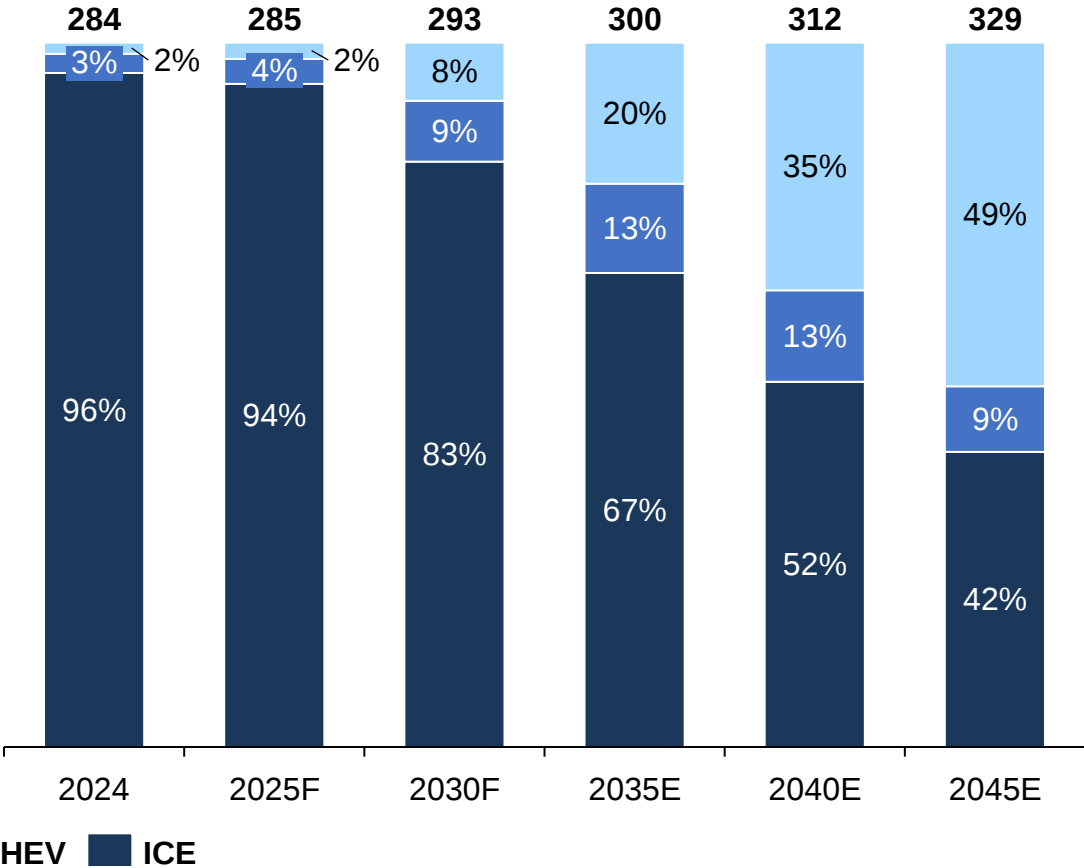
TOTAL U.S. CAR SALES, MILLIONS OF CARS]ES BY PROPULSION TYPE



2024-2045F FROTA DE VEÍCULOS POR TIPO DE PROPULSÃO

2024-2045F CAR PARC BY PROPULSION TYPE

[TOTAL U.S. CAR PARC, MILLIONS OF CARS]



Source: S&P Global Mobility (LV Sales and Production Forecast July 2024), DOT, Strategy& analysis
Notes: ICE includes traditional internal combustion engines and Mild-Hybrid including start-stop technologies



Fatores Geopolíticos *Geo-Political Factors*

Tensões Internacionais e Políticas Comerciais

International Tensions and Trade Policies

A Posição da China como Líder Automotiva?

China's Position as an Automotive Leader?



Monitor de Tarifas

Tariff Tracker

Status	Country/Product	Tariff Rate / Effective Date	
Implemented	China	IEEPA	10% (2/4/2025 - 3/3/2025) 20% (since 3/4/2025)
		Section 301	7.5% - 25% (started in 2018)
	Canada Mexico	IEEPA Tariffs	10% (2/4/2025 - 3/3/2025) 20% for non-USMCA goods / Tariff-free for USMCA compliant goods (since 3/4/2025)
	Steel and Aluminum + Derivatives based on content		25% (3/12/2025) except 200% Russia aluminum
	Autos and Auto Parts		25% autos (4/3/2025) 25% auto parts (~5/3/2025)
Pending	Chinese Maritime Operators Chinese-Built Vessels		\$500,000 to \$1 million per ship calling at a U.S. port
	Reciprocal Tariffs		Pending agency report by 4/2/2025
	Countries that purchase Venezuelan Oil		Pending agency report by 4/2/2025
	Copper		Pending agency report by 11/22/2025

Impacto das Tarifas

Tariff Impact

U.S. Automotive Parts Import Markets, 2023, NAICS 3363 (USD in millions)		
Country	2023	2023 Share (%)
Mexico	\$64,810	46.6%
Canada	\$16,127	11.6%
China	\$11,758	8.5%
India	\$2,245	1.6%
Brazil	\$576	0.4%
WORLD	\$138,929	100.0%

U.S. Automotive Parts Export Markets, 2023, NAICS 3363 (USD in millions)		
Country	2023	2023 Share (%)
Mexico	\$20,396	39.8%
Canada	\$18,400	35.9%
China	\$1,325	2.6%
Brazil	\$699	1.4%
South Africa	\$458	0.9%
India	\$394	0.8%
United Arab Emirates	\$319	0.6%
WORLD	\$51,194	100.0%



Demografia da Indústria e Tendências de Negócios

Industry Demographics and Business Trends

Mudanças Geracionais
Generational Shifts

Consolidação de Prestadores de Serviços
Service Providers Consolidation

Avanços na Produção
Manufacturing Advancements



***Oportunidades de
Colaboração entre os
EUA e o Brasil***

***Opportunities for U.S.
Brazil Collaboration***



Desenvolvimento da Força de Trabalho

Workforce Development

A viabilidade da nossa indústria depende da nossa capacidade de recrutar e capacitar técnicos qualificados que possam diagnosticar e reparar veículos modernos.

The viability of our industry is dependent on our ability to recruit and train skilled technicians that can diagnose and repair modern vehicles.

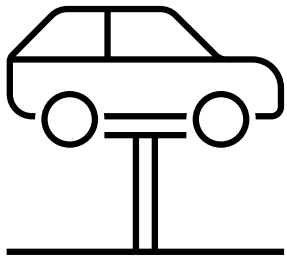


As consequências

The downstream effects

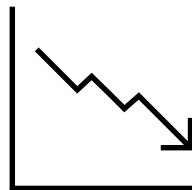
Os técnicos de manutenção e reparo mantêm as frotas em funcionamento e, conseqüentemente, impactam diretamente quase todos os setores da indústria de aftermarket automotivo.

Maintenance and repair technicians keep fleets rolling and, in turn, directly impact nearly everyone in the auto care industry.



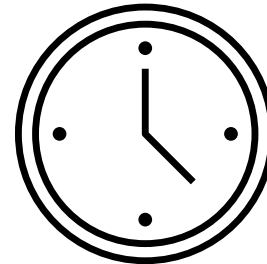
Menor número de carros para reparo

Lower car counts for repair



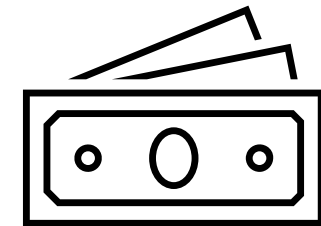
Perda de vendas de peças

Loss of parts sales



Aumento no tempo de espera para os motoristas

Increased wait times for drivers



Aumento dos custos para os motoristas

Increased costs for drivers

Fornecendo dados para impulsionar seus negócios

Bringing you data to do better business

ACES

AFTERMARKET CATALOG
EXCHANGE STANDARD

PIES

PRODUCT INFORMATION
EXCHANGE STANDARD



SCAN ME



basics

SÉRIE DE CAPACITAÇÕES



ENGAGE WITH US



Obrigado!

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autocare[®]
ASSOCIATION

Independence drives us.

autocare.org