RELATÓRIO ATIVIDADE DO LUXO BRASIL

Compilado Informativo

PAINEL DE CRESCIMENTO
X
EXPECTATIVAS

Painel de Crescimento Mercadológico 2019 – 2020:

1) VENDAS VAREJO VS LY: Janeiro – Outubro 2020 (1T, 2T e 3T)
a. Físico: média de -34% (mínima -85%, máxima 39%)
b. Físico: média de -13% (mínima -89%, máxima 114%)
c. Conversão: média de 35% (mínima -52%, máxima de 72%)

2) E-COMMERCE VS LY: Janeiro – Outubro 2020 (1T, 2T e 3T)
a. Média de 97% (mínima -27%, máxima 216%)
b. Média de 146% (mínima 60%, máxima 400%)
c. Conversão: média de 57% (mínima 39%, máxima 71%)

Painel de Crescimento Mercadológico 2019 – 2020:

3) SERVIÇOS VS LY: Janeiro – Outubro 2020 (1T, 2T e 3T)
a. Média de -82% (mínima -90%, máxima -68%)
b. Média de -72% (mínima -82%, máxima -55%)
c. Conversão: média -60% (mínima -78%, máxima -44%)

***Previsão média de baixa para o Ano 2020 x 2019 no físico = -38%**

DIA DOS NAMORADOS 2021 em relação ao orçado: +53,26%

Comparativo dos resultados Dia dos Namorados 2021 x 2020: +340,305%

Comparativo dos resultados Dia dos Namorados 2021 x 2019: +54,29%

Considerando os resultados de 2021, qual parcela desse resultado final representa o off-line e o on-line: 88% offline / 12% online.

Quanto cresceu o on-line apenas no Dia dos Namorados, (em caso de serviço incluir delivery): Média: +62,75%

Painel de Crescimento Mercadológico 2020 – 2021:

1) Resultados Médio Primeiro Trimestre: +27,06%

2) Expectativa Média 2021 x 2020: +31%

3) Resultados Médio Primeiro Semestre: +30,72%

4) Expectativa Média 2021: 36%

Principais Centros Comerciais

Shoppings de Luxo no Brasil:

- Iguatemi
- Iguatemi JK
- Cidade Jardim
- CJ Shops Jardins
- Village Mall
- Pátio Batel
- RioMar
- Rio Design Barra

Shoppings de Luxo Regionais:

- Iguatemi Brasília
- Flamboyant Shopping
- Diamond Mall

Outlets:

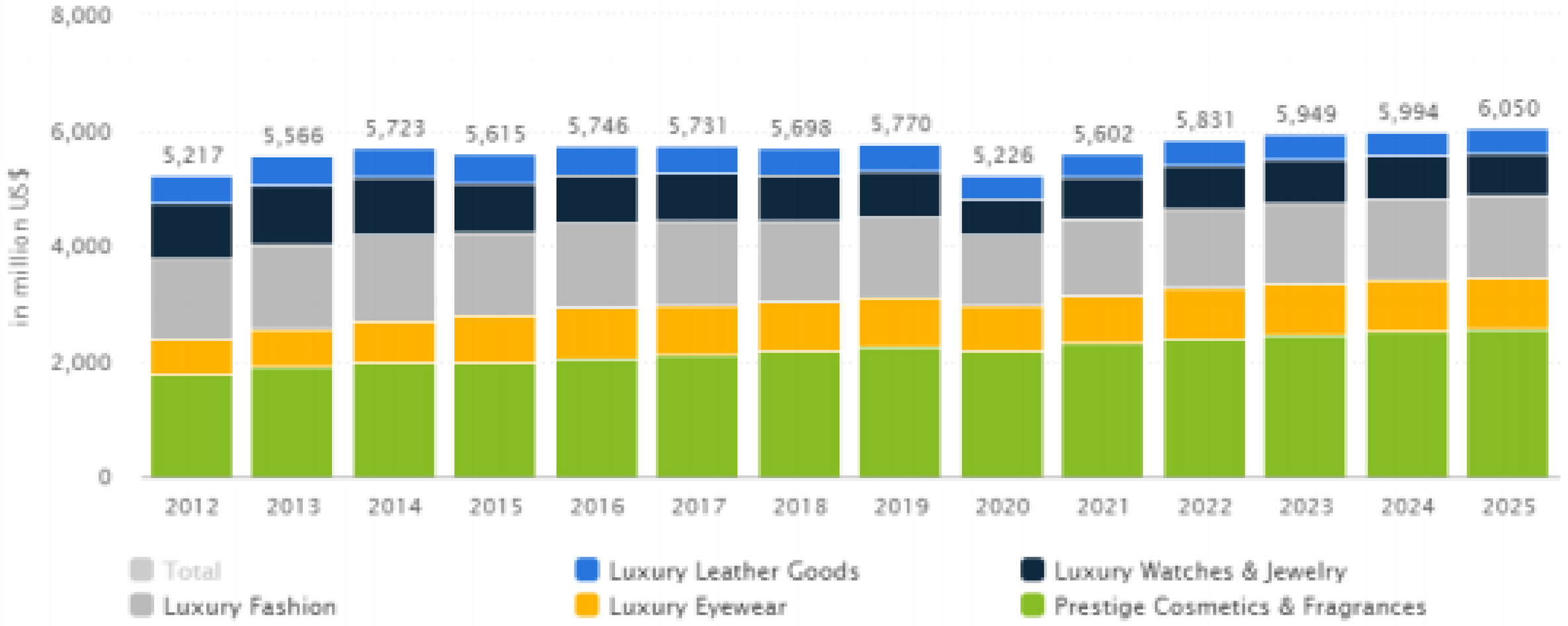
- **Catarina Fashion Outlet**
- **Outlet Premium**

A estimativa da EUROMONITOR INTERNATIONAL para 2020 foi de 694% de crescimento do consumo por e-commerce, enquanto as lojas físicas tiveram uma estimativa de -86%.

De acordo com a STATISTA, no Brasil, a receita no mercado de bens de Luxo chegou a US$ 5.226 milhões em 2020. O mercado deve crescer 3,0% anualmente (CAGR 2020-2025).

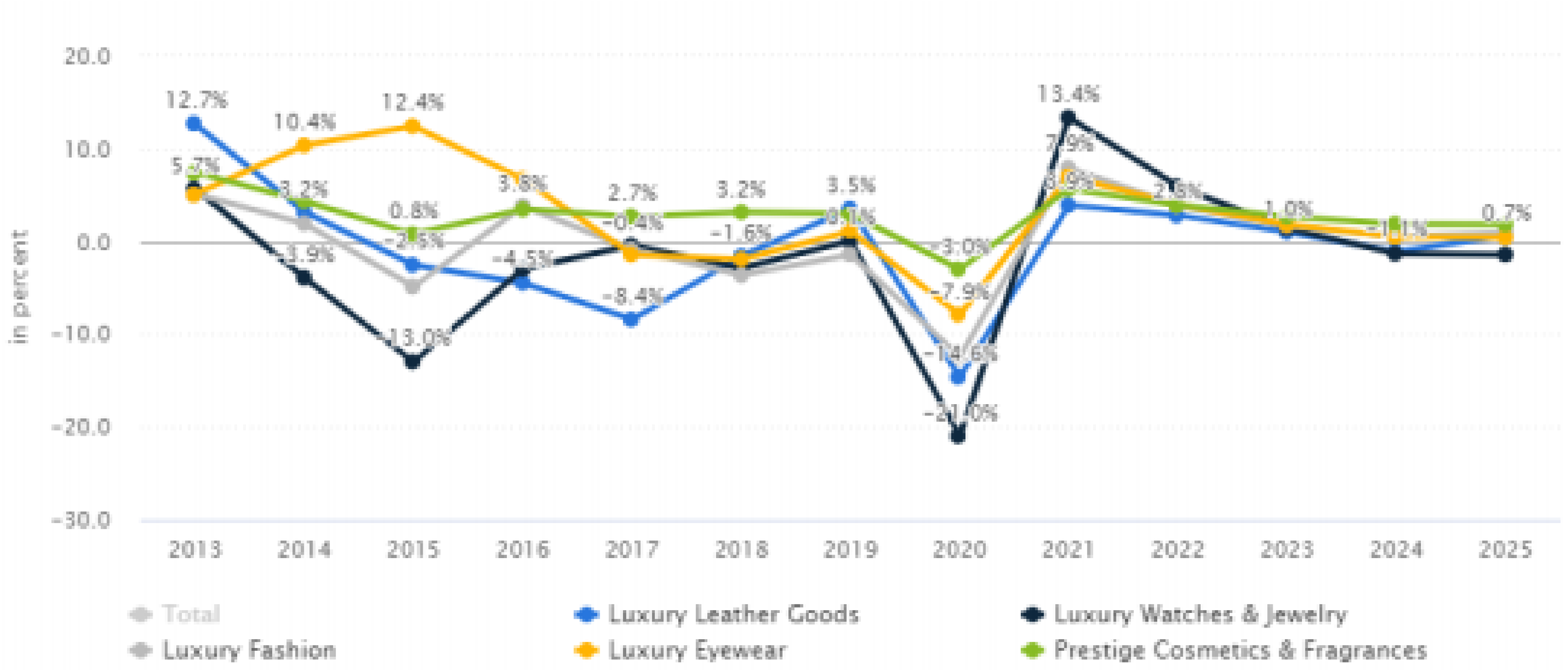
Em relação aos números da população total, receitas por pessoa de US$ 24,58 foram geradas em 2020.

Brazilian Revenue:



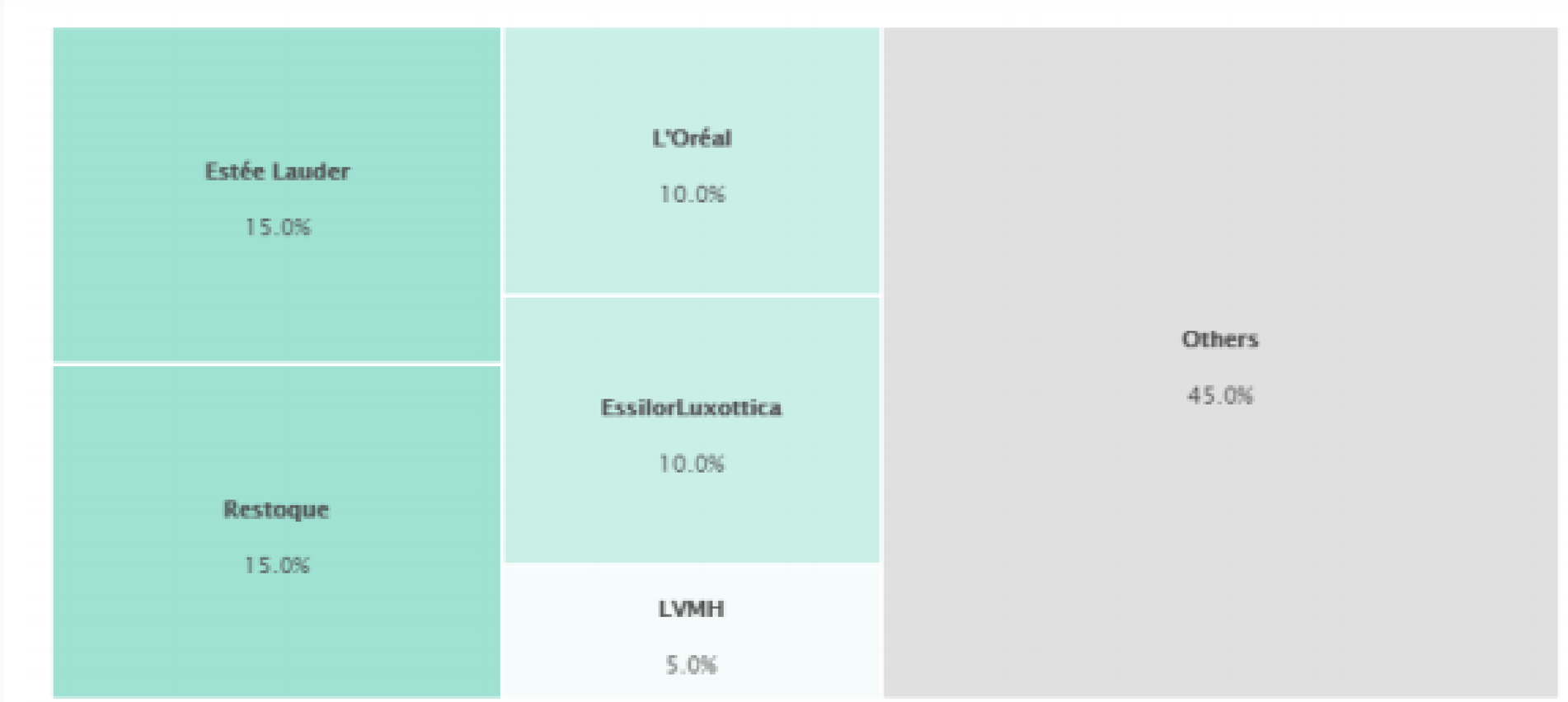
Source: Statista (Forecast adjusted for expected impact of COVID-19), July 2020

Brazilian Revenue Growth:

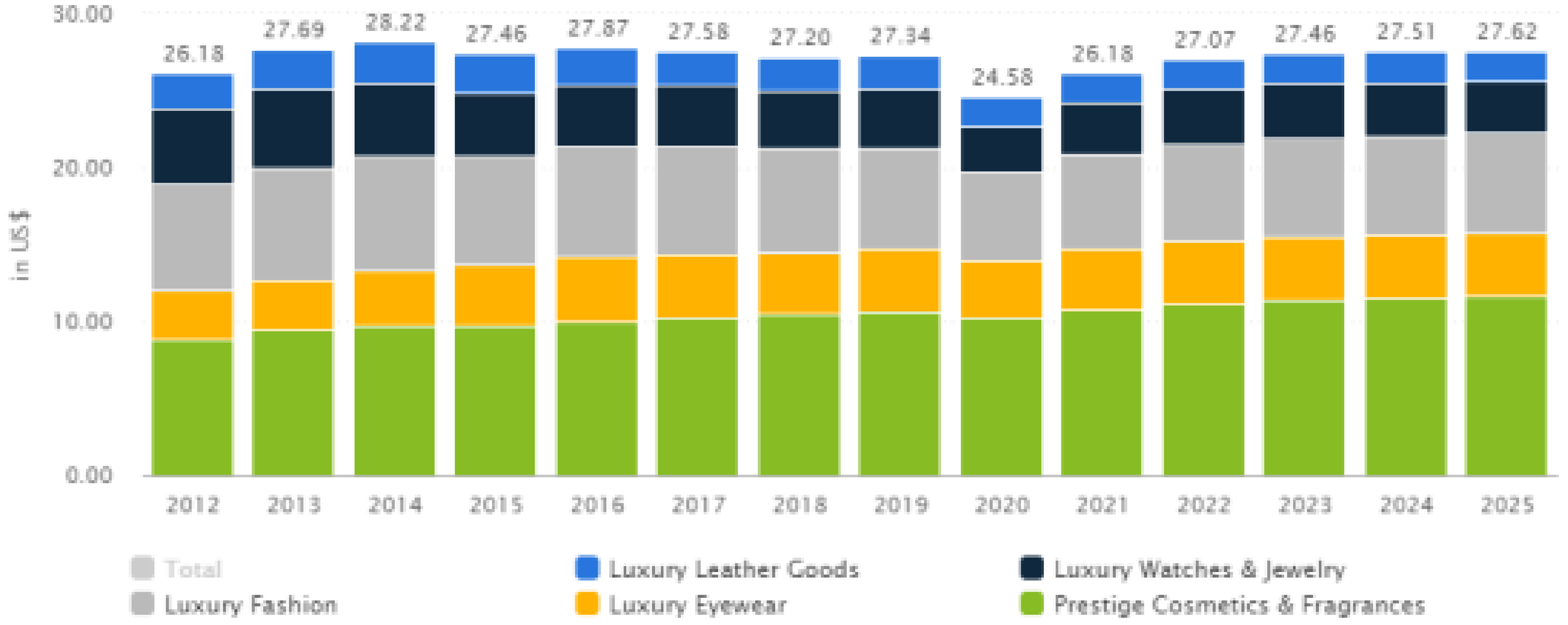


Source: Statista (Forecast adjusted for expected impact of COVID-19), July 2020

Os produtos das Marcas da The Estée Lauder Companies representaram cerca de 15% do mercado de bens de Luxo no segmento e no Brasil em 2020.



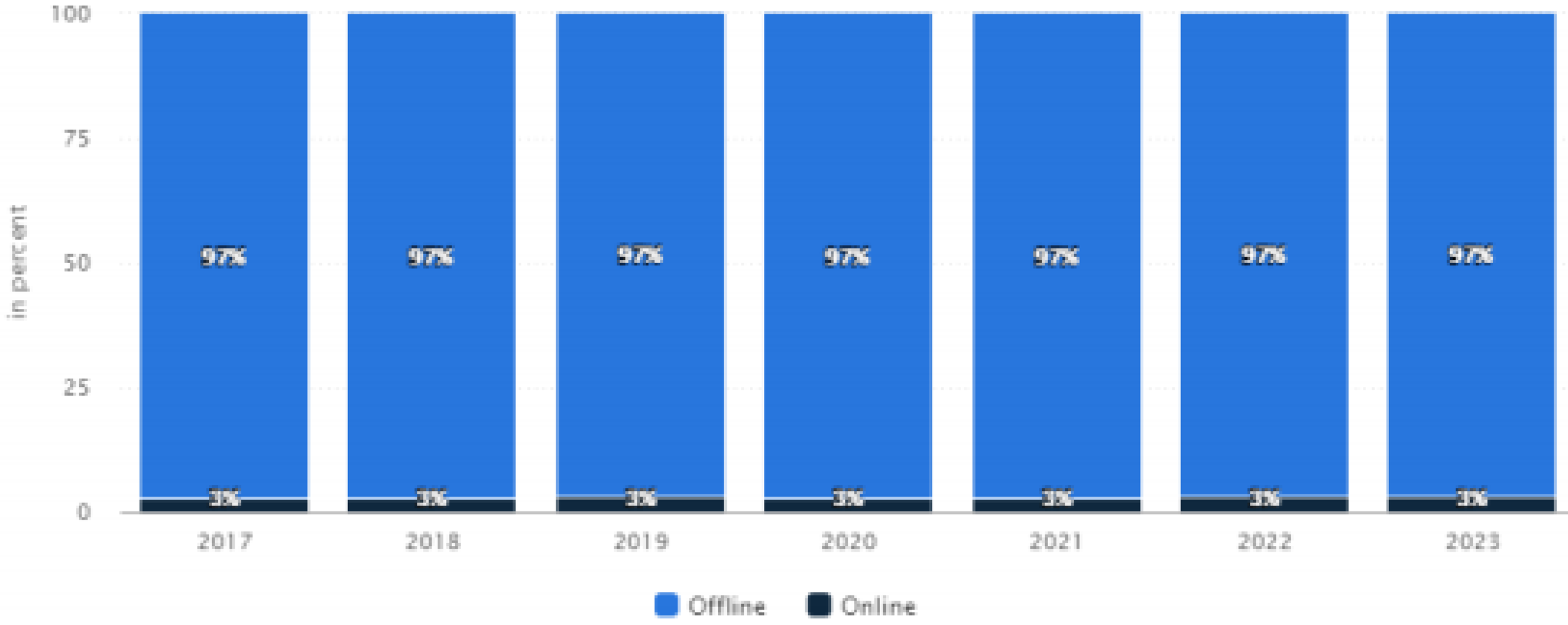
Source: Statista (Forecast adjusted for expected impact of COVID-19), July 2020



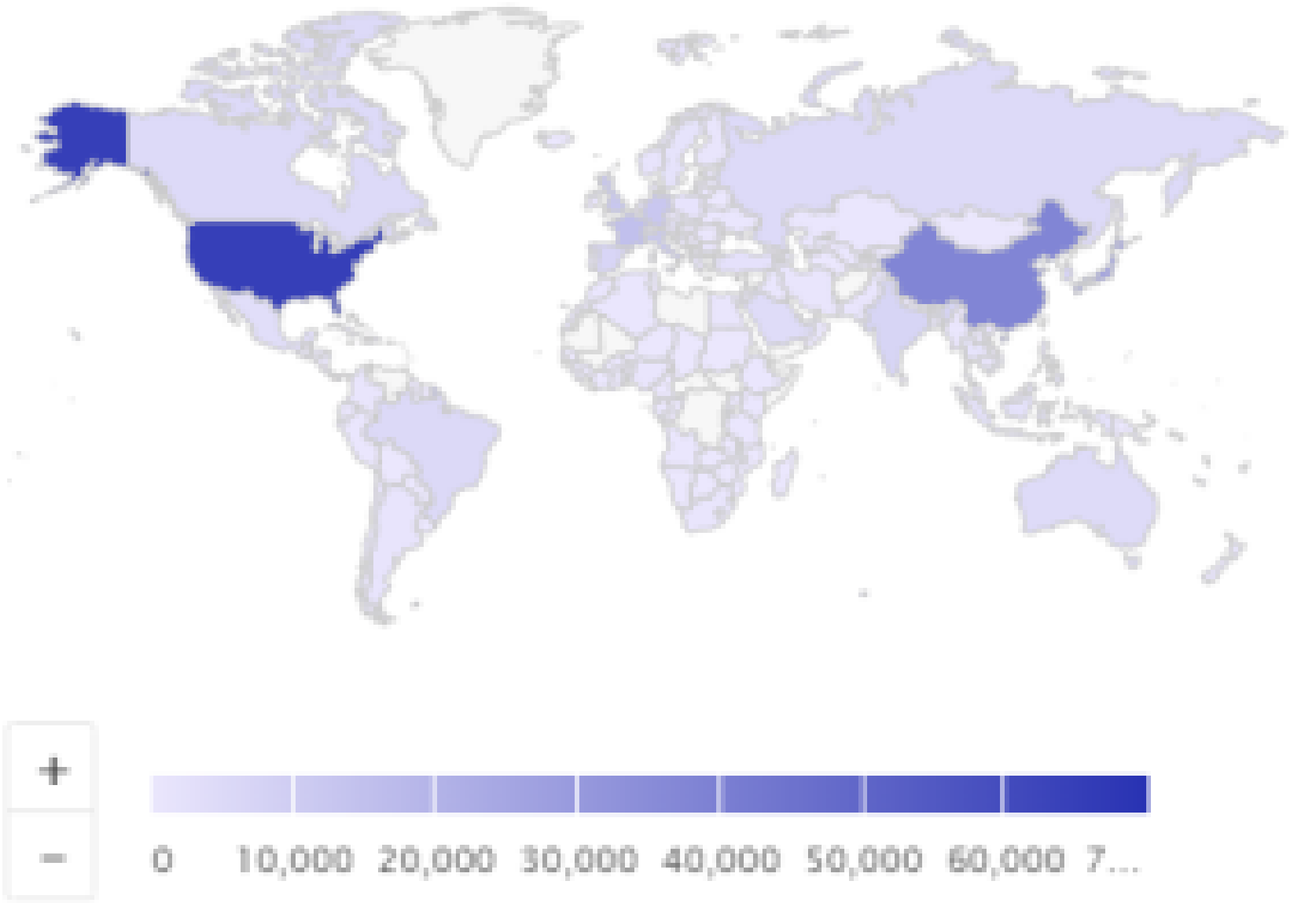
Source: Statista (Forecast adjusted for expected impact of COVID-19), July 2020

No mercado de artigos de Luxo, 3% da receira total será gerada por meio de vendas online até 2023.

Brazilian Sales Channels:



Source: Statista (Forecast adjusted for expected impact of COVID-19), July 2020



Top 5	
1. United States	US$65,019m
2. China	US$38,077m
3. Japan	US$27,386m
4. France	US$15,235m
5. United Kingdom	US$12,454m
12. Brazil	**US$5,226m**

Source: Statista (Forecast adjusted for expected impact of COVID-19), July 2020 © Natural Earth



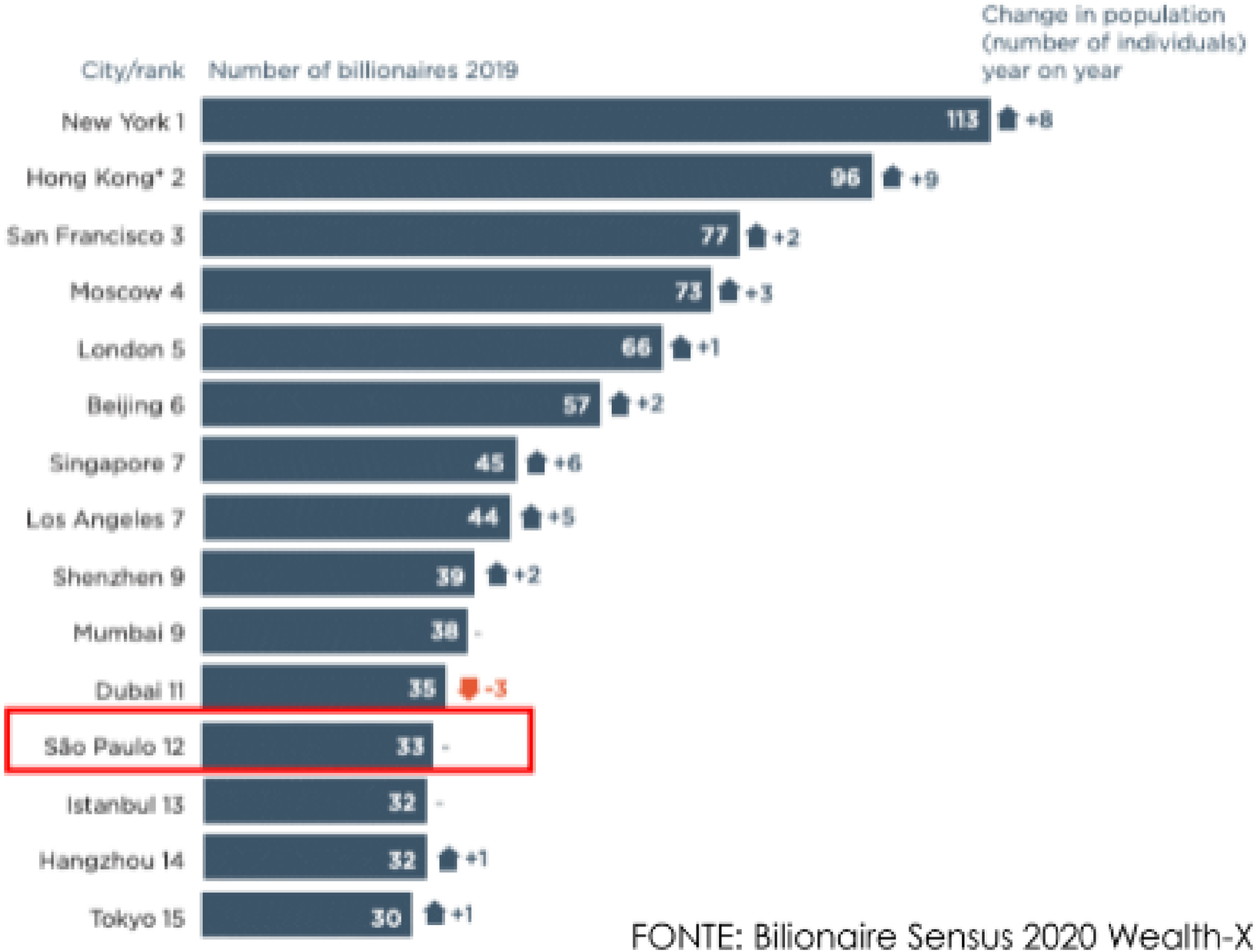
Source: Euromonitor International Macro Model, National Statistics

Forecasts for Real GDP growth in 2020 under different scenarios

Country	Baseline	Change in Baseline since January 2020	COVID-19 Deep Recession	COVID-19 Crisis	COVID-19 Deep Crisis	Real GDP growth in 2009 (the worst year of the Global Financial Crisis)
Brazil	-1.0%	-3.1%	-2.7%	-5.3%	-8.6%	-0.1%

Source: Euromonitor International Macro Model and National Statistics

TOP 15 BILLIONAIRE CITIES



FONTE: Bilionaire Sensus 2020 Wealth-X

Detalhamento Consumo Luxo
Ano - Ano

MARKET DATA

Table 2 Sales of Luxury Goods by Category: Value 2014-2019

BRL million

	2014	2015	2016	2017	2018	2019
Luxury Foodservice	-	-	-	-	-	-
Luxury Hotels	1,470.9	1,454.0	1,562.1	1,638.4	1,252.2	1,198.5
Experiential Luxury	1,470.9	1,454.0	1,562.1	1,638.4	1,252.2	1,198.5
Fine Wines	389.1	412.6	340.6	380.7	381.6	387.5
Luxury Spirits	353.3	380.4	296.7	334.8	335.1	349.6
Fine Wines/Champagne and Spirits	742.5	793.1	637.3	715.5	716.7	737.2
Premium and Luxury Cars	12,645.7	16,587.4	12,994.7	12,761.4	13,930.1	14,566.8
Designer Apparel and Footwear (Ready-to-Wear)	4,415.2	4,737.5	4,312.4	4,120.8	4,444.4	4,938.7
Luxury Eyewear	2,668.1	2,895.5	2,766.8	2,719.8	2,779.8	2,866.6
Luxury Jewellery	897.6	943.3	964.7	988.9	1,011.8	1,044.0
Luxury Leather Goods	693.1	754.8	788.0	786.8	853.0	921.7
Luxury Portable Consumer Electronics	-	-	-	-	-	-
Luxury Timepieces	495.0	524.8	495.8	482.2	500.5	518.5
Luxury Writing Instruments and Stationery	59.8	63.8	66.8	68.7	71.6	75.7
Super Premium Beauty and Personal Care	1,075.8	1,212.5	1,263.2	1,326.3	1,499.0	1,668.3
Personal Luxury	10,304.6	11,132.0	10,657.8	10,493.4	11,160.2	12,033.4
Luxury Goods	25,163.6	29,966.4	25,851.8	25,608.7	27,059.1	28,535.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Luxury Goods by Category: % Value Growth 2014-2019

% current value growth

	2018/19	2014-19 CAGR	2014/19 Total
Luxury Foodservice	-	-	-
Luxury Hotels	-4.3	-4.0	-18.5
Experiential Luxury	-4.3	-4.0	-18.5
Fine Wines	1.6	-0.1	-0.4
Luxury Spirits	4.3	-0.2	-1.0
Fine Wines/Champagne and Spirits	2.9	-0.1	-0.7
Premium and Luxury Cars	4.6	2.9	15.2
Designer Apparel and Footwear (Ready-to-Wear)	11.1	2.3	11.9
Luxury Eyewear	3.1	1.4	7.4
Luxury Jewellery	3.2	3.1	16.3
Luxury Leather Goods	8.1	5.9	33.0
Luxury Portable Consumer Electronics	-	-	-
Luxury Timepieces	3.6	0.9	4.7
Luxury Writing Instruments and Stationery	5.6	4.8	26.4
Super Premium Beauty and Personal Care	11.3	9.2	55.1
Personal Luxury	7.8	3.2	16.8
Luxury Goods	5.5	2.5	13.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Inbound Receipts for Luxury Goods by Country of Origin: Value 2014-2019

BRL Million

	2014	2015	2016	2017	2018	2019
Brazil	-	-	-	-	-	-
China	12.0	10.8	10.9	11.3	12.3	14.1
France	58.5	67.7	64.6	58.9	57.9	60.4
GCC Countries	0.6	0.7	0.6	0.6	0.6	0.5
Germany	54.9	46.9	40.1	33.5	31.7	31.2
Japan	18.4	16.1	13.8	14.2	14.2	14.8
Russia	5.4	0.8	5.9	4.4	3.8	3.6
South Korea	11.9	10.7	12.3	10.2	9.8	10.2
United Kingdom	28.9	34.0	30.3	29.1	28.5	29.7
US	186.4	183.1	166.6	146.6	147.2	155.2
Other	556.9	637.5	614.4	637.2	679.1	721.6
Total	933.8	1,008.2	959.5	945.9	985.1	1,041.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 5 NBO Company Shares of Luxury Goods: % Value 2014-2018

% retail value rsp Company	2014	2015	2016	2017	2018
Mercedes-Benz do Brasil SA	12.6	16.9	13.8	15.4	16.4
BMW do Brasil Ltda	14.4	13.8	13.0	11.3	11.8
Jaguar e Land Rover Brasil Indústria e Comércio de Veiculos Ltda	10.3	9.1	9.3	9.8	10.6
Audi do Brasil Indústria de Veículos Ltda	10.5	13.5	11.3	9.7	8.1
PVH Corp	2.7	2.4	2.8	3.2	3.2
Porsche Brasil Importadora de Veiculos Ltda	1.5	1.3	2.1	2.5	3.0
Puig Brasil Comercializadora de Perfumes S/A	1.0	1.0	1.2	1.3	1.6
Hotel Marco Internacional SA	1.5	1.3	1.5	1.5	1.4
Marchon Brasil Ltda	2.7	1.2	1.2	1.3	1.2
Belocap Produtos	1.0	0.8	1.0	1.0	1.2

Capilares Ltda					
Richemont SA, Cie Financière	0.8	0.8	1.0	1.0	1.1
JHSF Participações SA	0.6	0.7	0.9	0.9	1.0
Luxottica do Brasil Ltda	0.9	0.9	0.9	0.9	0.9
Via Itália Comércio e Importação de Veículos Ltda	0.7	0.4	0.4	0.5	0.9
LVMH Fashion Group Brasil Ltda	0.7	0.6	0.8	0.8	0.8
H Stern Comércio e Indústria Ltda	1.0	0.9	0.9	0.9	0.8
Toyota do Brasil Ltda	0.2	0.3	0.4	0.6	0.7
LVMH Perfums & Cosmetics do Brasil Ltda	0.5	0.5	0.7	0.7	0.7
Hotelaria Accor Brasil SA	0.7	0.6	0.8	0.9	0.7
Brazilian Hospitality Group	0.7	0.6	0.7	0.7	0.6
Kering SA	0.4	0.4	0.5	0.6	0.6
Grupo Fasano	0.6	0.5	0.6	0.6	0.5
Rothenberg Comércio de Perfumes e Cosméticos Ltda	0.4	0.4	0.5	0.5	0.5
Tiffany Brasil Ltda	0.4	0.3	0.4	0.4	0.4
Hugo Boss do Brasil Ltda	0.4	0.4	0.4	0.4	0.4
Prada Brasil Importação e Comércio de Artigos de Luxo Ltda	0.3	0.3	0.4	0.4	0.4
LVMH Vinhos e Destilados Brasil Ltda	0.4	0.4	0.4	0.4	0.4
Pernod Ricard Brasil Ltda	0.4	0.4	0.4	0.4	0.4
Diageo Brasil Ltda	0.3	0.3	0.4	0.4	0.3
Europrestigio	0.2	0.2	0.3	0.3	0.3
Distribuição e Comércio de Artigos de Luxo Ltda					
Belmond Brasil Hoteis SA	1.1	0.9	1.1	1.1	-
Others	30.1	28.0	30.1	29.9	29.1
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Luxury Goods: % Value 2015-2018

% retail value rsp Brand (GBO)	Company (NBO)	2015	2016	2017	2018
Mercedes-Benz (Daimler AG)	Mercedes-Benz do Brasil SA	16.9	13.8	15.4	16.4
BMW (Bayerische Motoren Werke AG)	BMW do Brasil Ltda	13.8	13.0	11.3	11.8
Audi (Volkswagen AG)	Audi do Brasil Indûstria de Veiculos Ltda	13.5	11.3	9.7	8.1
Land Rover (Tata Motors Ltd)	Jaguar e Land Rover Brasil Indûstria e Comércio de Veiculos Ltda	8.4	8.1	7.9	7.9
Calvin Klein	PVH Corp	2.4	2.8	3.2	3.2
Porsche (Volkswagen AG)	Porsche Brasil Importadora de Veiculos Ltda	1.3	2.1	2.5	3.0

Jaguar (Tata Motors Ltd)	Jaguar e Land Rover Brasil Indústria e Comércio de Veiculos Ltda	0.6	1.2	1.9	2.7
Fasano (JHSF Participações SA)	Hotel Marco Internacional SA	1.3	1.5	1.5	1.4
Hermès (Hermès International SCA)	JHSF Participações SA	0.7	0.9	0.9	1.0
Kérastase (L'Oréal Groupe)	Belocap Produtos Capilares Ltda	0.6	0.7	0.7	0.8
Cartier	Richemont SA, Cie Financière	0.6	0.7	0.7	0.8
Calvin Klein (Vision Service Plan Global)	Marchon Brasil Ltda	0.8	0.9	0.9	0.8
Louis Vuitton (LVMH Moët Hennessy Louis Vuitton SA)	LVMH Fashion Group Brasil Ltda	0.6	0.8	0.8	0.8
H Stern (H Stern Co & Ind, SA)	H Stern Comércio e Indústria Ltda	0.9	0.9	0.8	0.8
Lexus (Toyota Motor Corp)	Toyota do Brasil Ltda	0.3	0.4	0.6	0.7
Gucci	Kering SA	0.3	0.4	0.5	0.5
Golden Tulip (Jin Jiang International Co Ltd)	Brazilian Hospitality Group	-	-	-	0.5
Sofitel (AccorHotels Group)	Hotelaria Accor Brasil SA	0.6	0.7	0.7	0.5
Tiffany & Co (Tiffany & Co)	Tiffany Brasil Ltda	0.3	0.4	0.4	0.4
Lamborghini (Volkswagen AG)	Via Itália Comércio e Importação de Veiculos Ltda	0.1	0.1	0.1	0.4

Hugo Boss (Hugo Boss AG)	Hugo Boss do Brasil Ltda	0.4	0.4	0.4	0.4
Prada (Prada SpA)	Prada Brasil Importação e Comércio de Artigos de Luxo Ltda	0.3	0.3	0.3	0.3
Michael Kors (Luxottica Group SpA)	Marchon Brasil Ltda	0.3	0.3	0.4	0.3
Swarovski (Swarovski AG)	Swarovski Cristais Ltda	0.2	0.3	0.3	0.3
Burberry (Burberry Group Plc)	Burberry Brasil Comércio de Artigos de Vestuário e Acessórios Ltda	0.3	0.3	0.3	0.3
True Religion	True Religion Apparel Inc	0.3	0.3	0.3	0.3
Valentino	Valentino Fashion Group SpA	0.2	0.2	0.3	0.3
InterContinental	InterContinental Hotels Group Plc	0.2	0.3	0.3	0.3
212 VIP (Puig SL)	Puig Brasil Comercializadora de Perfumes S/A	0.2	0.2	0.2	0.3
Tod's	Tod's SpA	0.2	0.2	0.2	0.3
Belmond (Belmond Ltd)	Belmond Brasil Hoteis SA	0.9	1.1	1.1	-
Golden Tulip (Shanghai Jin Jiang International Hotels Group Co Ltd)	Brazilian Hospitality Group	0.4	0.5	0.5	-
Others	Others	32.0	35.1	34.8	34.3
Total	Total	100.0	100.0	100.0	100.0

Table 8 Forecast Sales of Luxury Goods by Category: Value 2019-2024

BRL million	2019	2020	2021	2022	2023	2024
Luxury Foodservice	-	-	-	-	-	-
Luxury Hotels	1,198.5	1,137.2	1,182.2	1,230.0	1,281.1	1,335.3
Experiential Luxury	1,198.5	1,137.2	1,182.2	1,230.0	1,281.1	1,335.3
Fine Wines	387.5	397.1	410.1	426.1	444.8	466.1
Luxury Spirits	349.6	349.7	349.8	349.9	350.0	350.1
Fine Wines/Champagne and Spirits	737.2	746.8	759.9	776.0	794.9	816.2
Premium and Luxury Cars	14,566.8	14,454.9	14,483.2	14,503.5	14,523.8	14,541.5
Designer Apparel and Footwear (Ready-to-Wear)	4,938.7	5,293.7	5,685.2	6,122.3	6,607.5	7,138.9
Luxury Eyewear	2,866.6	2,928.3	2,998.1	3,077.5	3,166.1	3,240.3
Luxury Jewellery	1,044.0	1,051.1	1,060.5	1,071.8	1,085.1	1,099.2
Luxury Leather Goods	921.7	952.8	1,006.6	1,058.9	1,116.2	1,178.8
Luxury Portable Consumer Electronics	-	-	-	-	-	-
Luxury Timepieces	518.5	519.1	520.8	523.9	528.0	532.9
Luxury Writing Instruments and Stationery	75.7	77.2	79.3	81.6	84.4	88.0
Super Premium Beauty and Personal Care	1,668.3	1,786.5	1,916.1	2,058.3	2,213.9	2,384.6
Personal Luxury	12,033.4	12,608.7	13,266.7	13,994.4	14,801.2	15,662.7
Luxury Goods	28,535.8	28,947.6	29,691.9	30,503.9	31,400.9	32,355.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Sales of Luxury Goods by Category: % Value Growth 2019-2024

% constant value growth

	2019/2020	2019-24 CAGR	2019/24 Total
Luxury Foodservice	-	-	-
Luxury Hotels	-5.1	2.2	11.4
Experiential Luxury	-5.1	2.2	11.4
Fine Wines	2.5	3.8	20.3
Luxury Spirits	0.0	0.0	0.1
Fine Wines/Champagne and Spirits	1.3	2.1	10.7
Premium and Luxury Cars	-0.8	0.0	-0.2
Designer Apparel and Footwear (Ready-to-Wear)	7.2	7.6	44.6
Luxury Eyewear	2.2	2.5	13.0
Luxury Jewellery	0.7	1.0	5.3
Luxury Leather Goods	3.4	5.0	27.9
Luxury Portable Consumer Electronics	-	-	-
Luxury Timepieces	0.1	0.6	2.8
Luxury Writing Instruments and Stationery	2.1	3.1	16.3
Super Premium Beauty and Personal Care	7.1	7.4	42.9
Personal Luxury	4.8	5.4	30.2
Luxury Goods	1.4	2.5	13.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Global Powers of Luxury Goods Top 100

FY2017 Luxury goods sales ranking	Change in ranking	Name of company	Country of origin	Selection of luxury brands	FY2017 Luxury goods sales (US$m)	FY2017 Total revenue (US$m)	FY2017 Luxury goods sales growth	FY2017 Net profit margin[1]	FY2015-2017 Luxury goods CAGR[2]
66	↓ -10	Sanyo Shokai Ltd.	Japan	Mackintosh, Paul Stuart	558	558	-7.5%	-1.6%	-19.9%
67	↓ -3	Zhejiang Ming Jewelry Co., Ltd. 浙江明牌珠宝股份有限公司	China	MINGR, VI	545	545	10.1%	2.4%	-16.1%
68	↓ -1	Marcolin Group	Italy	Marcolin; Licensed eyewear brands	529	529	6.2%	-3.1%	3.9%
69	↑ 2	Tse Sui Luen Jewellery (International) Limited	Hong Kong	TSL | 謝瑞麟	489	489	11.8%	1.2%	3.8%
70	↓ -1	De Rigo SpA	Italy	Police, Lozza, Sting; Licensed eyewear brands	483	483	1.4%	-2.4%	1.0%
71	↓ -1	MARC O'POLO AG	Germany	MARC O'POLO	466*	466*	-4.4%	n/a	-2.3%
72	↑ 11	Canada Goose Holdings Inc.	Canada	Canada Goose	461	461	46.4%	16.3%	42.6%
73	New	Vera Bradley, Inc.	US	Vera Bradley	455	455	-6.4%	1.5%	-4.9%
74	↓ -1	Breitling SA	Switzerland	Breitling	437*	437*	2.9%	n/a	2.3%
75	↓ -1	Kurt Geiger Limited	UK	Kurt Geiger London, KG Kurt Geiger, Miss KG, Carvela	422	422	4.7%	7.0%	7.4%
76	↔ 0	S Tous SL	Spain	Tous	415*	415*	10.5%	n/a	10.9%
77	↑ 5	Euroitalia S.r.l.	Italy	Reporter, Naj-Oleari Licensed Fragrance brands: Moschino, Versace, Missoni	402	402	n/a	-1.5%	n/a
78	New	Zadig & Voltaire	France	Zadig & Voltaire	394*	394*	n/a	n/a	n/a
79	↑ 1	Restoque Comércio e Confecções de Roupas S.A.	Brazil	Le Lis Blanc, Dudalina, Bo.Bô, John John	391	391	11.0%	33.7%	2.5%
80	↓ -3	Sociedad Textil Lonia SA	Spain	Purificación García; Licensed brand : CH Carolina Herrera	389	389	1.6%	8.9%	0.6%

81	↓	-3	LiuJo SpA	Italy	Liu.Jo	388	388	8.5%	9.1%	6.1%
82	↓	-1	Aeffe SpA	Italy	Moschino, Pollini, Alberta Ferretti, Philosophy	357	357	10.1%	3.6%	7.5%
83	↓	-4	Gefin SpA	Italy	Etro	338	338	-2.3%	-2.6%	-2.7%
84	↑	2	Franck Muller Group	Switzerland	Franck Muller	305*	305*	13.2%	n/a	2.6%
85	↓	-1	Marc Cain Holding GmbH	Germany	Marc Cain	296	308	3.3%	3.1%	1.7%
86	↓	-1	TWINSET—Simona Barbieri SpA	Italy	Twin Set, SCEE	287	287	3.7%	-5.4%	1.7%
87	↑	2	Tribhovandas Bhimji Zaveri Limited	India	tbz	273	273	3.6%	1.2%	3.2%
88	↑	5	J Barbour & Sons Ltd	UK	Barbour	270	270	9.2%	13.4%	14.3%
89	↑	1	Festina Lotus SA	Spain	Festina, Lotus, Candino, Jaguar, Calypso	268*	268*	5.3%	n/a	-2.0%
90	↑	6	Richard Mille SA	Switzerland	Richard Mille	264*	264*	15.6%	n/a	18.5%
91	↑	1	Fashion Box SpA	Italy	Replay	262	262	4.4%	0.6%	-1.2%
92	↑	7	Falke KGaA	Germany	Falke, Burlington	262	262	0.6%	4.5%	1.1%
93	↓	-5	Charles Tyrwhitt Shirts Limited	UK	Charles Tyrwhitt	250	250	12.2%	-2.6%	6.7%
94		New	Van de Velde NV	Belgium	Marie Jo, PrimaDonna, Andres Sarda, Rigby & Peller	235	242	1.1%	15.8%	0.0%

BALANÇO JAN-SET/20 | cross border

Gastos de brasileiros no exterior

US$ 2,78 bi (-57,6%) R$ 13,17 bi (-48,3%)

BALANÇO 3T20 | cross border

Gastos de brasileiros no exterior

US$ 590,4 mi (-73,5%) R$ 3,2 bi (-64%)

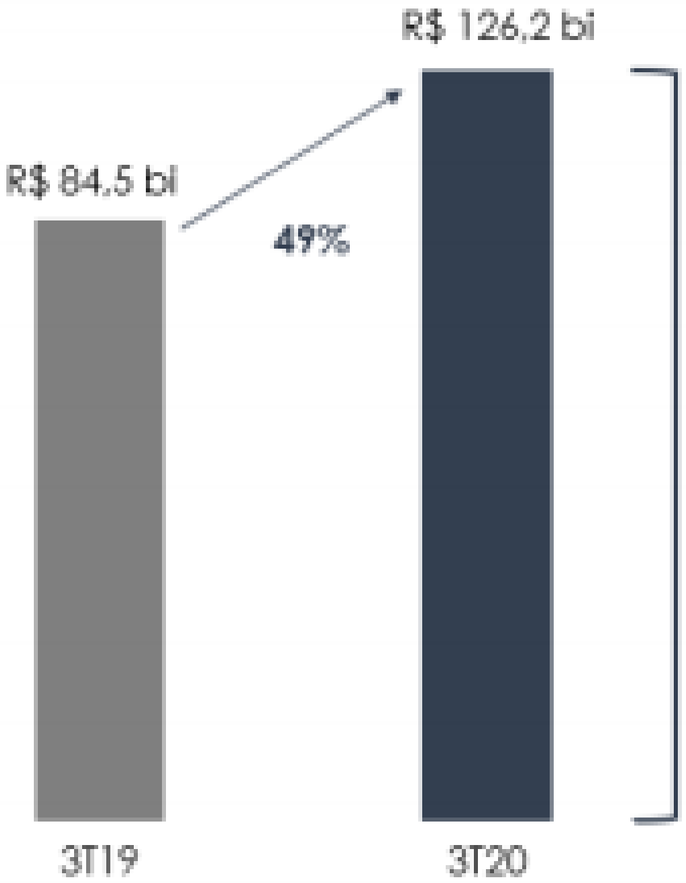
O Brasil está entre os **5 maiores mercados no mundo em cartões de crédito e débito**, com base no número de transações efetuadas com o recurso

No final do 2019 existiam **123 milhões de cartões de crédito** e **132 milhões de cartões de débito ativos** no País, o que corresponde a uma alta de 18% e de 14%, respectivamente, em relação a 2018

Teve um **aumento de 33% no número de transações com cartões de crédito** e de 20% com os de débito

No período Jan-Set 20 já houve um valor total de R $ 1,38 tri em transações, um aumento de 5,4% vs 2019 (sendo R $ 850 bi nos cartões de crédito, +0,8%)

COMPRAS REMOTAS COM CARTÃO NO BRASIL



CARTÃO DE CRÉDITO
R$ 99,6 bi +20% (1/3 DAS TOTAIS TRANSAÇÕES TOTAIS)

CARTÃO DE DÉBITO
R$ 25,6 bi +3.1%

CARTÃO PRÉ PAGO
R$ 982,4 mi +61,4%

Brasil chega a **238 BILIONÁRIOS** em 2020: fortuna total é quase PIB do Chile

33 NOVOS NOMES se comparado ao estudo de 2019

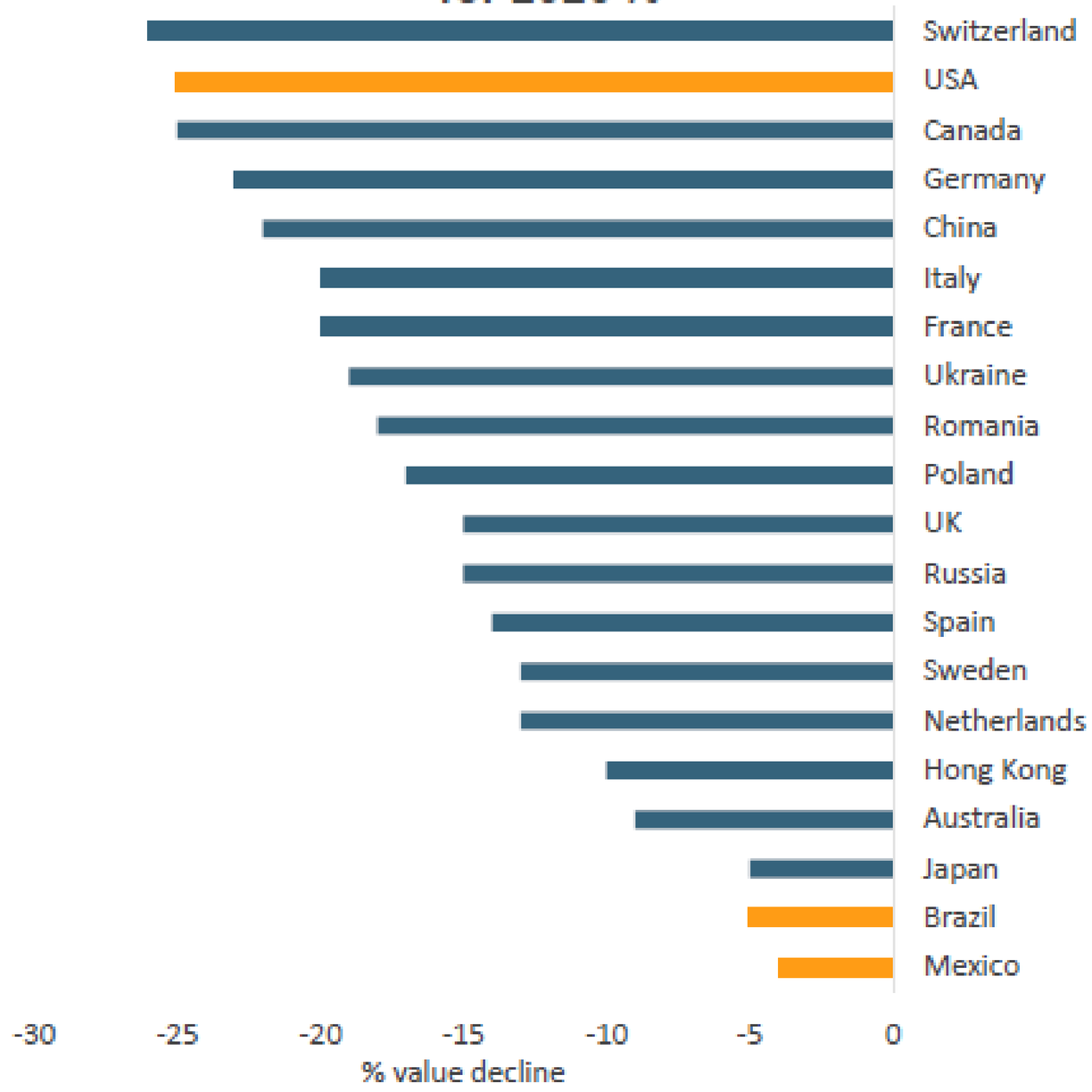
De acordo com um estudo desenvolvido pela Fundação Getúlio Vargas em Ago/2020 as cidades com maior concentração de HNWI no Brasil

1. **Nova Lima (Minas Gerais)**
2. **Santana de Parnaíba (Grande São Paulo)**
3. **Aporé (Goiás)**
4. **São Caetano do Sul (Grande São Paulo)**
5. **Niterói (Rio de Janeiro)**

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Luxury Goods Sales: Top 20 Downgrades by Country for 2020 %

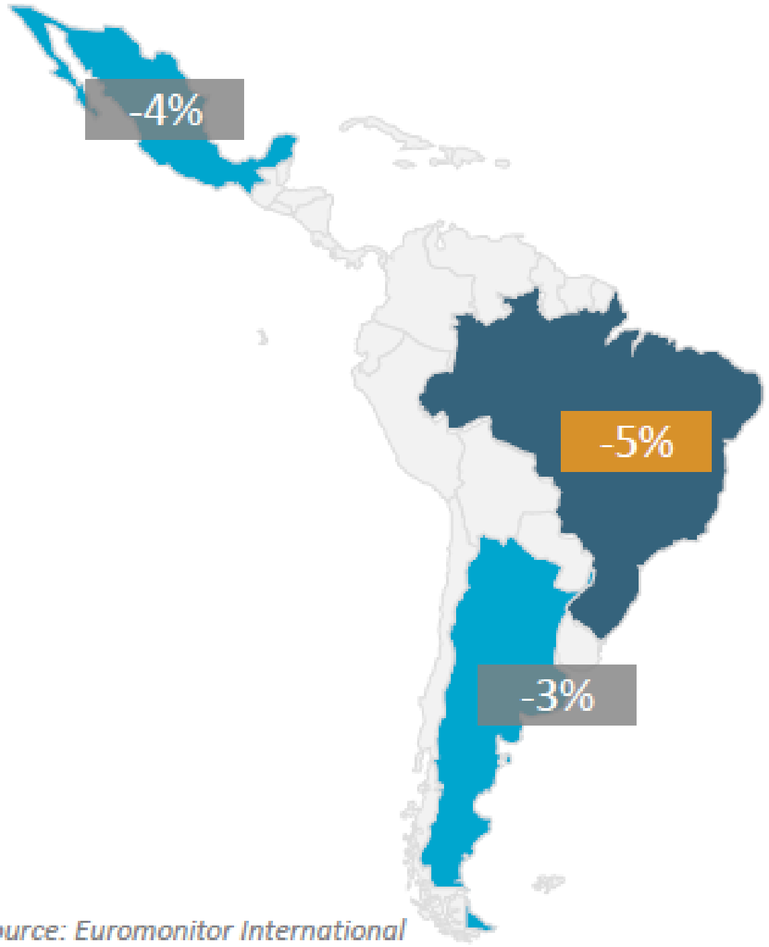


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Outlook for Latin America

- The Latin American region was already facing difficulties both politically and economically
- One if the regions biggest success stories for 2019 was that Brazil had returned to growth
- The crisis spells bad news for regional developments with economic contracts of 6% in Argentina, 5% in Brazil and 7% in Mexico
- As the virus advances major impacts are expected in luxury goods and hospitality
- Regional sales impacted further owing to lack of E-commerce and strong store-based channels

Latin America: Possible Scenario in Evolution of Luxury Goods Performance 2020



Source: Euromonitor International

© Euromonitor International

EUROMONITOR INTERNATIONAL

Repatriation to potentially help local sales

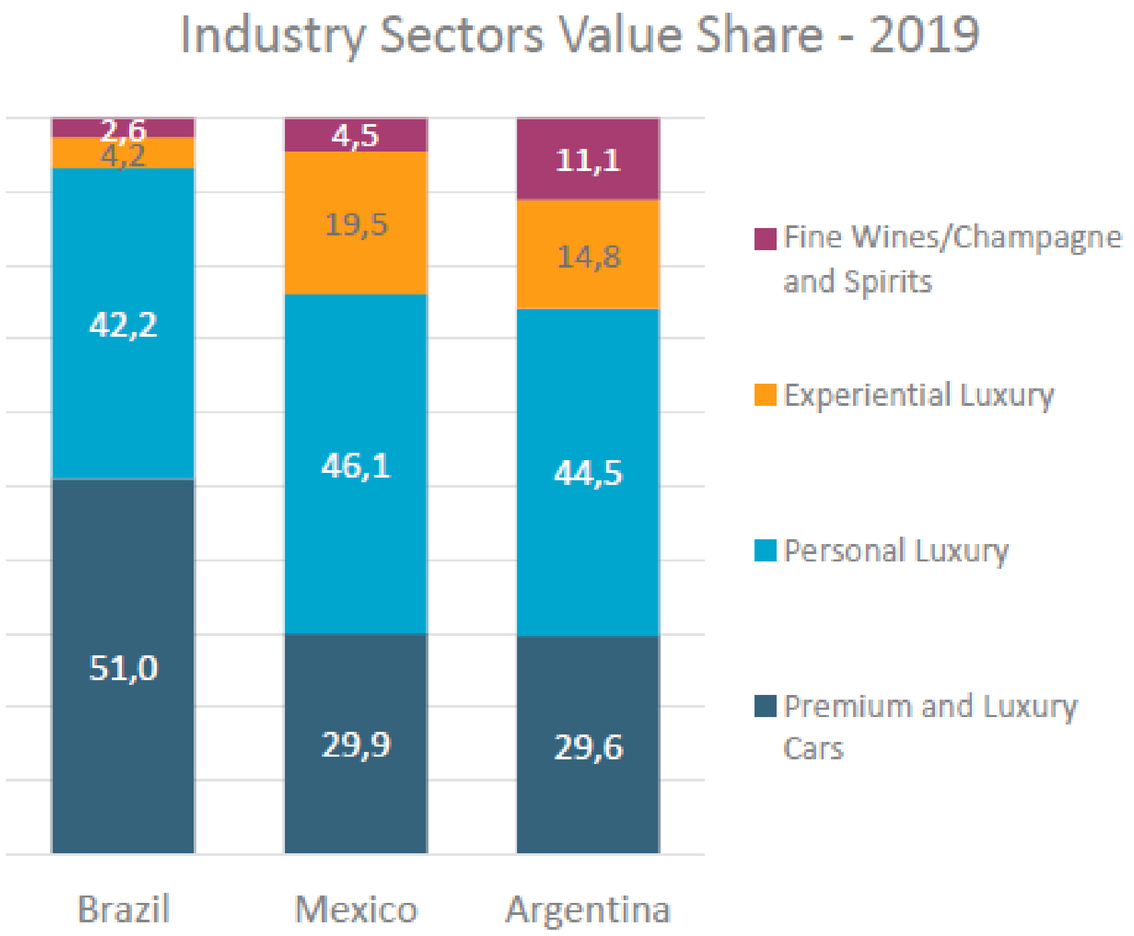


- Repatriation of sales can offer opportunities to brands already stablished in the country
- **Brazilians spent almost USD 4 billion in luxury goods in USA, France and Italy** - personal luxury sales in Brazil were of USD 3.2 billion
- Low dependency on tourism also mitigates negative effects in Brazil; However, Argentina should register worse results, as 20% of its sales are made by tourists
- Despite foreseeing opportunities, brands have to carefully analyse a potential trade down ahead. Brands like Zara outperformed during the last crisis, with consumers opting to lower priced items

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Experiential luxury to hit hard sales in Mexico and Argentina



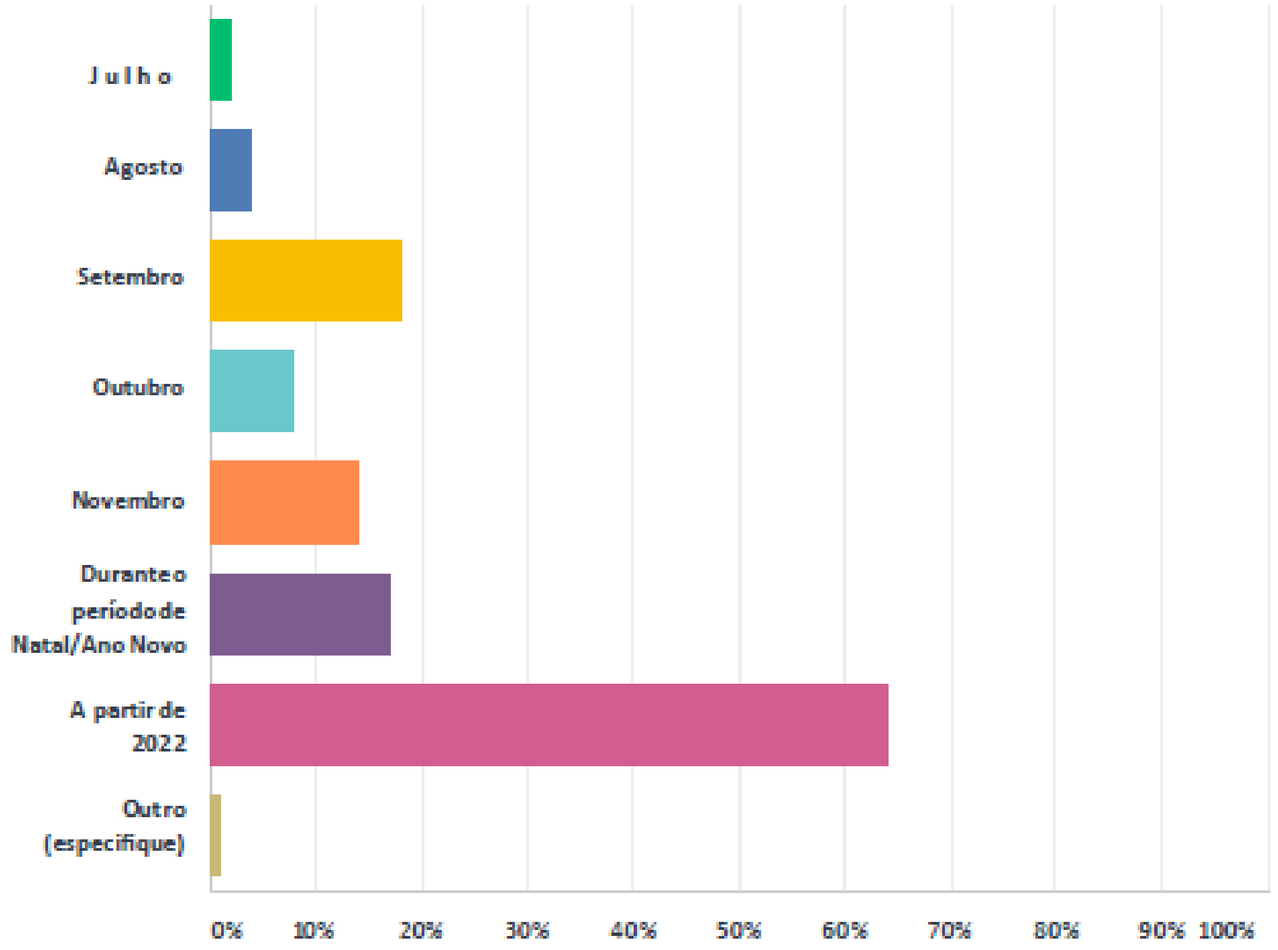
- Brazil is expected to be less impacted in Latin America, with the majority of sales coming from durable goods. Luxury cars was one of the less impacted categories over the last crisis, potentially allowing Brazil to recover faster versus other Latin American countries.
- Mexico sees a strong issue in the higher dependency on experiential luxury. This sector is also responsible for leveraging the sales performance of personal luxury in the country.
- Argentina has similar scenario as seen in Mexico, with stronger influence of international inbounds to maintain the same levels of personal luxury consumption.

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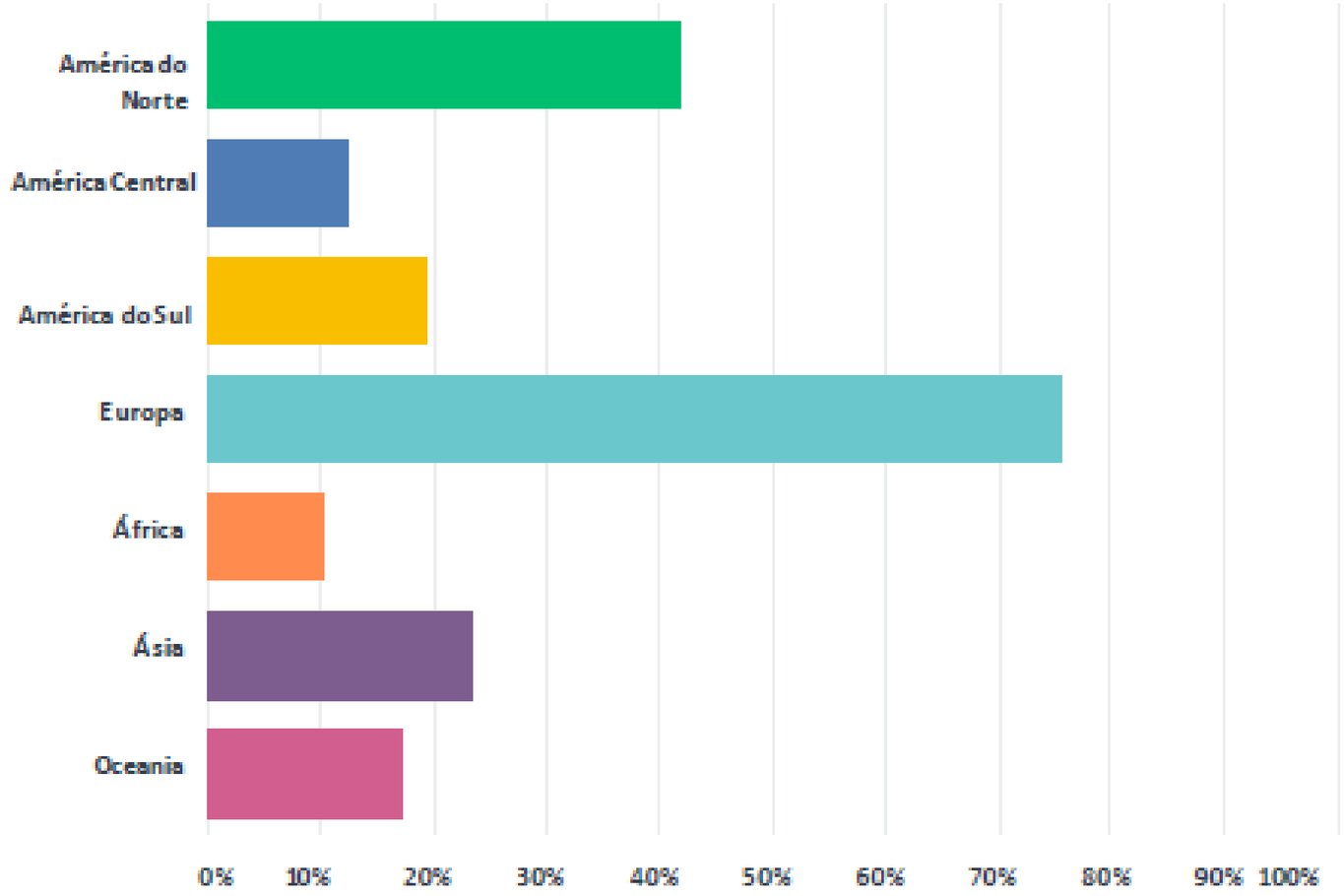
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VIAGENS 2020 - 2021

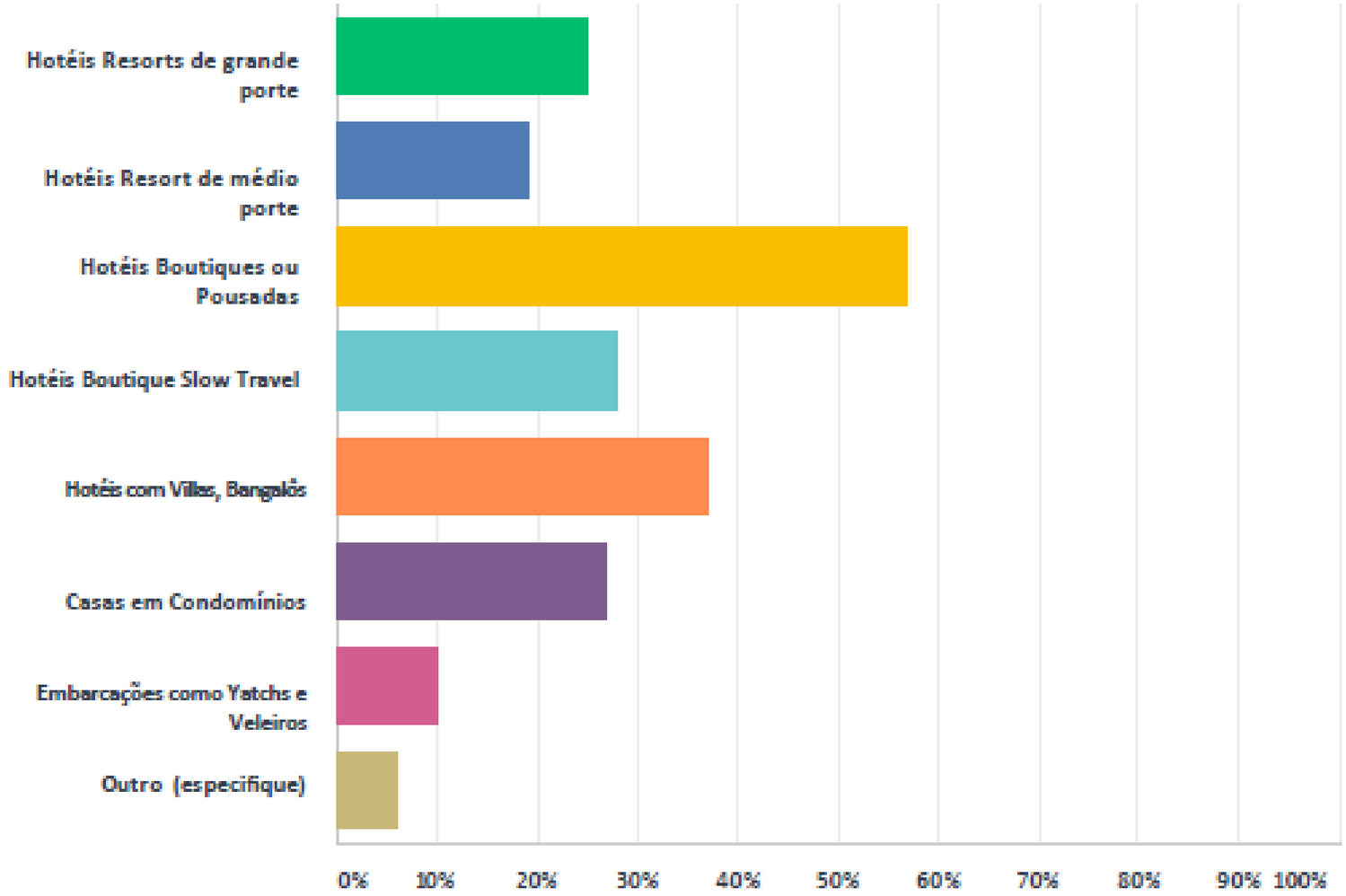
Estando com tantas restrições para viagens internacionais há tanto tempo, na sua próxima viagem de turismo internacional, você pretende viajar em:



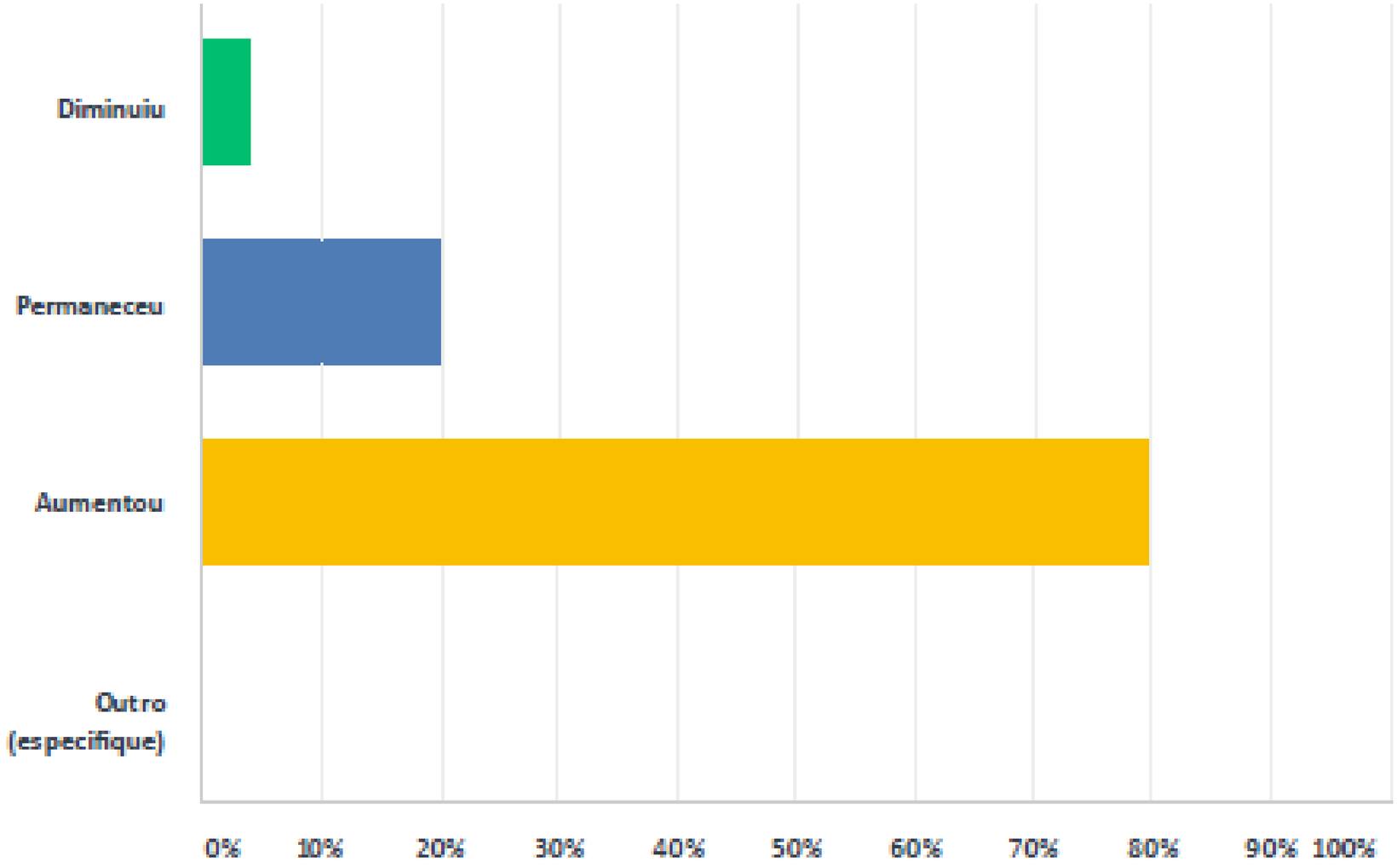
E quais regiões do Mundo você consideraria viajar a lazer, férias e desconexão: (marque a(s) região(ões) e comente os países e cidades de destino em outros)



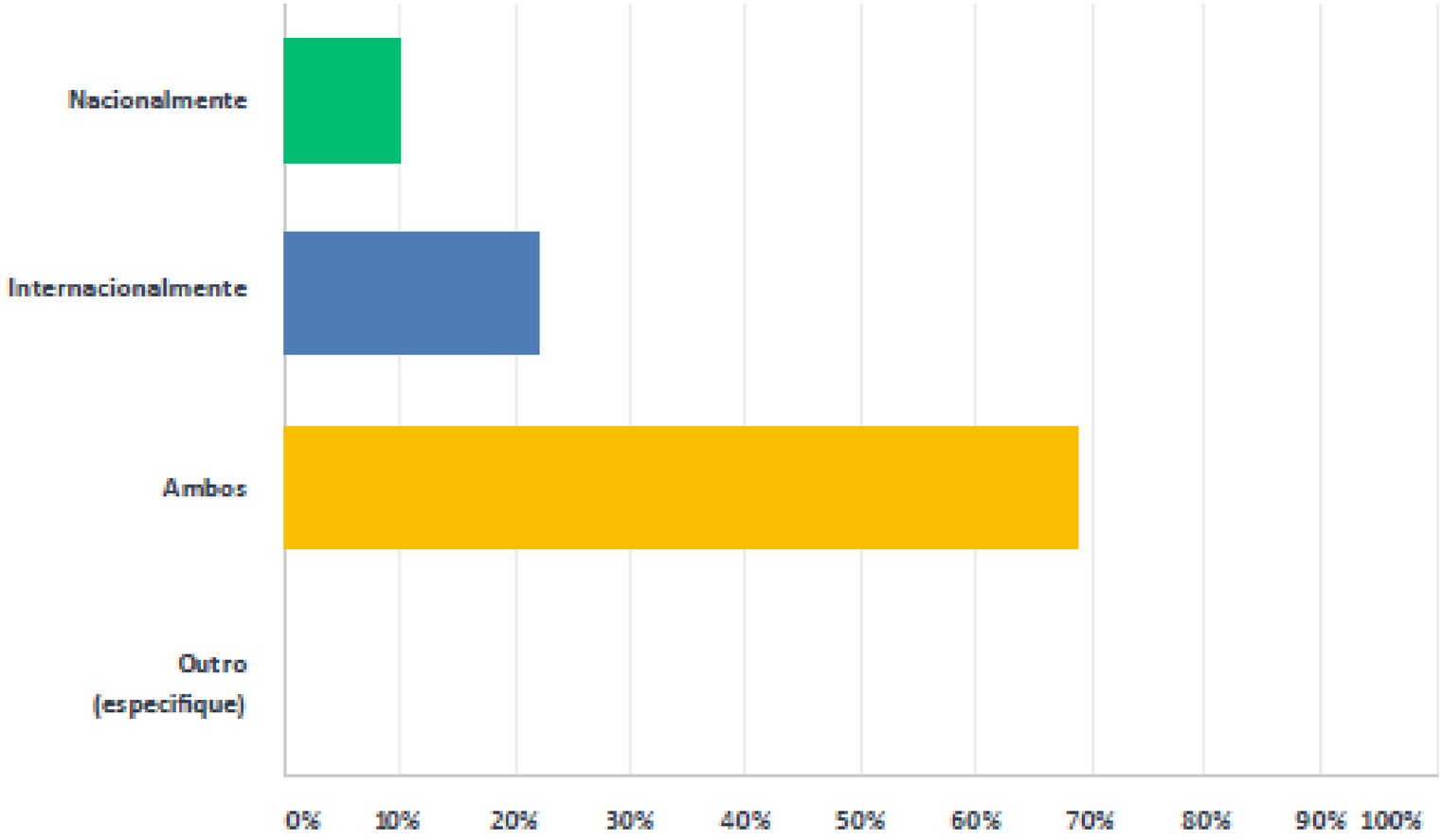
Em relação à hospedagem, o que te deixaria mais confortável, seguro e/ou motivado para optar para a sua hospedagem?



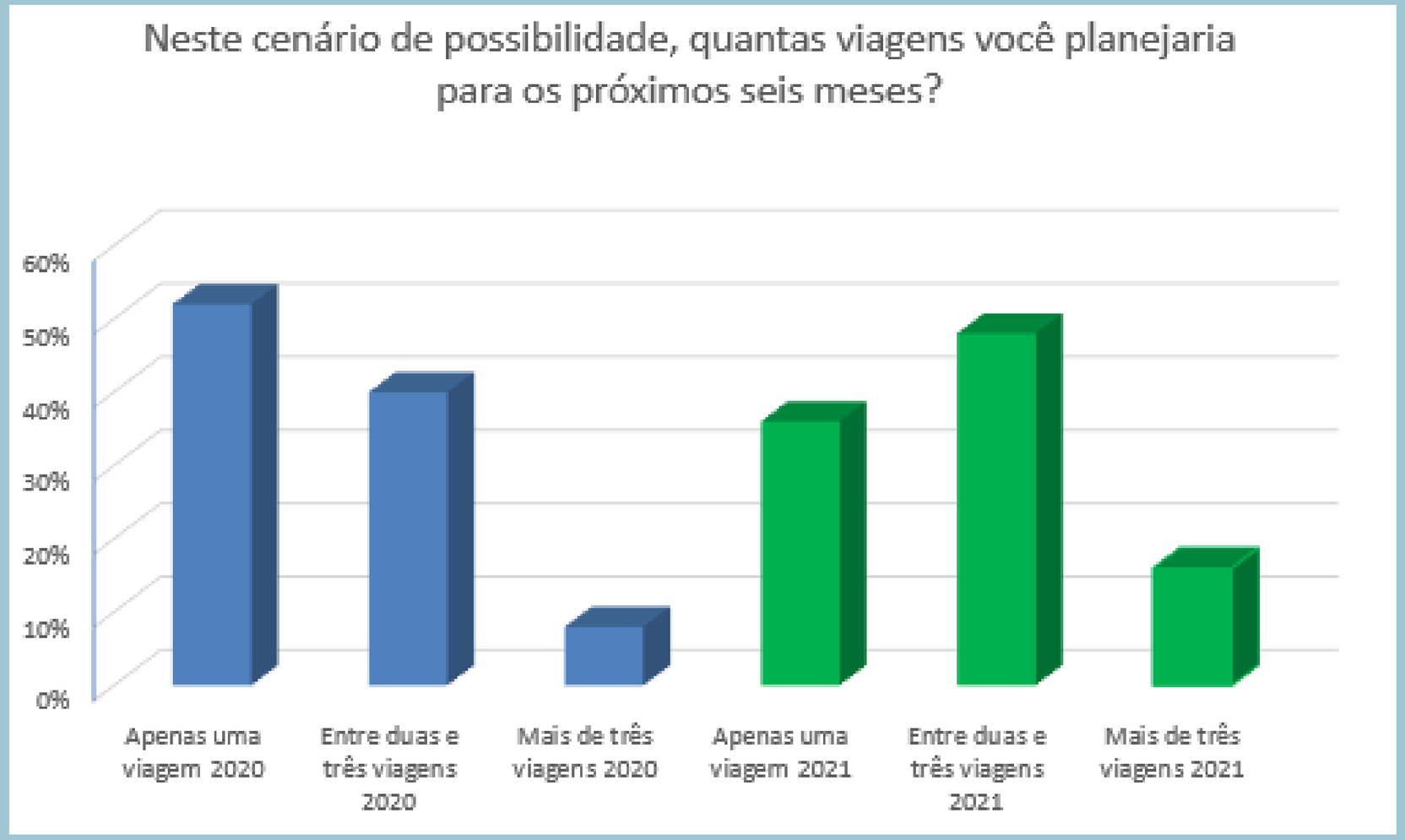
Sobre o seu desejo de viajar...



Considerando a possibilidade do término da pandemia ou do total controle sob ela, onde você se sentirá mais seguro para viajar com mais frequência?




Sendo possível, a sua escolha nos próximos seis meses, seria uma viagem:
80,00%
70,00%
60,00%
50,00%
40,00%
30,00%
20,00%
10,00%
0,00%
Nacional 2020
Internacional 2020
Nacional 2021
Internacional 2021


Neste cenário de possibilidade, quantas viagens você planejaria para os próximos seis meses?
60%
50%
40%
30%
20%
10%
0%
Apenas uma viagem 2020
Entre duas e três viagens 2020
Mais de três viagens 2020
Apenas uma viagem 2021
Entre duas e três viagens 2021
Mais de três viagens 2021

OBRIGADO!