



INSTITUTO  
BRASILEIRO DE  
PETRÓLEO E GÁS

#EnergiaParaSuperar





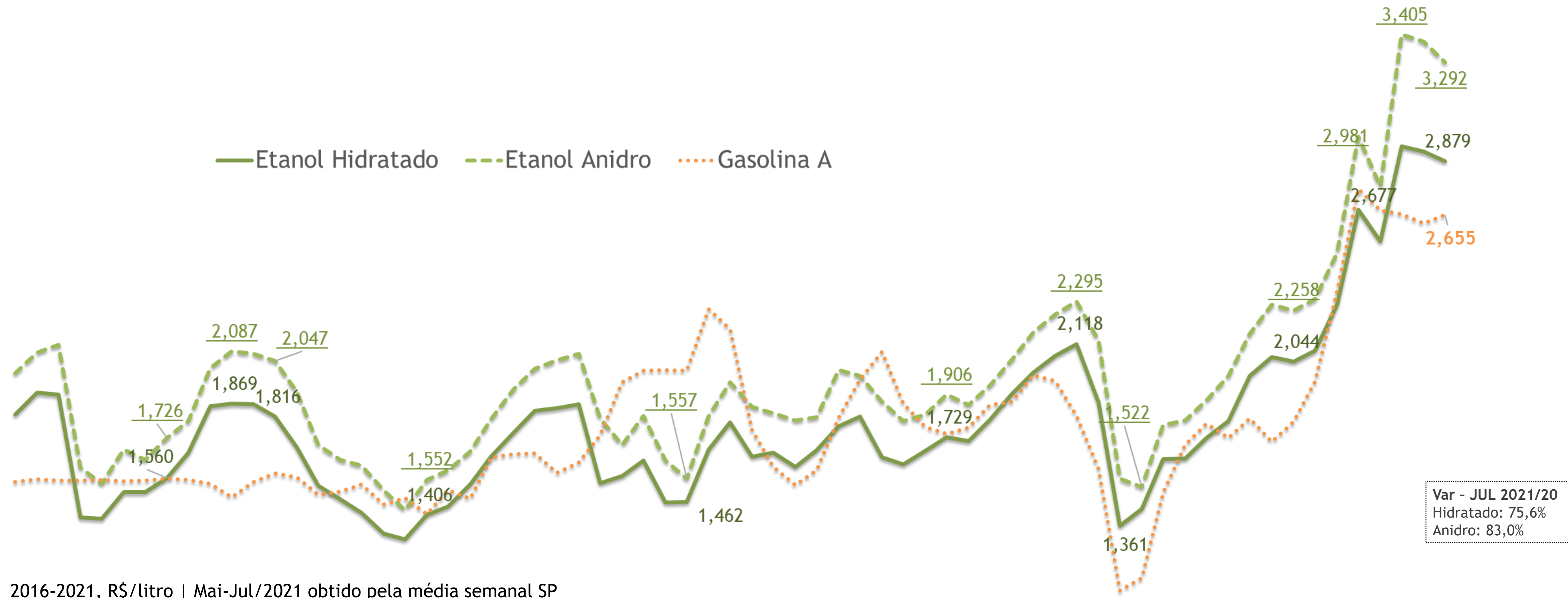
# Orientação sobre normas e ética concorrencial

## DISCLAIMER

- Os participantes da reunião comprometem-se a observar o Código de Ética e o Estatuto da ABD disponível neste [link](#).
- É expressamente proibida a discussão ou qualquer troca de informações entre os membros da Associação relativas a questões comerciais, de mercado e concorrenciais, especialmente, mas não se limitando a:
  - a) quantidade produzida;
  - b) volume de vendas;
  - c) preços praticados, margens de lucro e reajustes de preço;
  - d) dados de custo;
  - e) informações de plantas e de capacidades produtivas;
  - f) planos de investimentos;
  - g) desenvolvimento de novos produtos e inovação tecnológica;
  - h) dados específicos e individualizados de clientes e fornecedores; e
  - i) outros dados de sensibilidade concorrencial.

# 1. Dados de mercado

# Históricos de preços ao produtor



2016-2021, R\$/litro | Mai-Jul/2021 obtido pela média semanal SP

1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7
2016												2017												2018												2019												2020												2021						

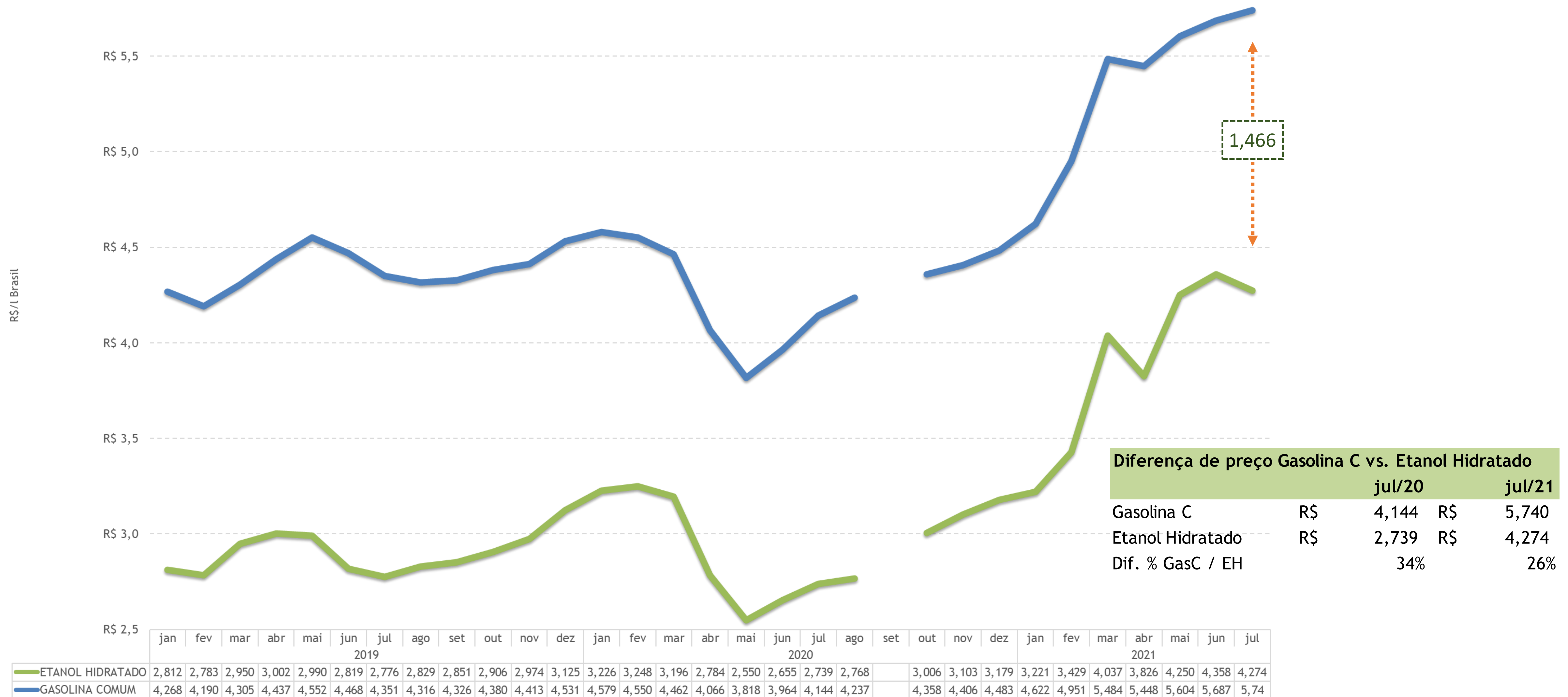
Etanol Anidro e Hidratado recuaram enquanto a Gasolina C se manteve constante

# Paridade do preço do Etanol Hidratado em relação a Gasolina C



Paridade 70%	2018												2019												2020												2021							
	JAN	FEV	MAR	ABR	MAI	JUN	JUL	AGO	SET	OUT	NOV	DEZ	JAN	FEV	MAR	ABR	MAI	JUN	JUL	AGO	SET	OUT	NOV	DEZ	JAN	FEV	MAR	ABR	MAI	JUN	JUL	AGO	OUT	NOV	DEZ	JAN	FEV	MAR	ABR	MAI	JUN	JUL		
AC	77%	77%	77%	83%	83%	79%	79%	79%	77%	75%	78%	82%	84%	86%	83%	82%	79%	78%	80%	81%	82%	81%	81%	80%	81%	82%	84%	88%	91%	84%	78%	77%	79%	80%	79%	77%	76%	80%	82%	82%	86%	87%		
AL	78%	79%	81%	83%	81%	78%	78%	77%	73%	70%	70%	71%	75%	76%	77%	78%	81%	79%	79%	82%	82%	79%	77%	74%	76%	78%	80%	84%	85%	82%	77%	76%	78%	77%	76%	76%	76%	78%	81%	83%	87%	87%		
AP	85%	95%	92%	93%	93%	94%	98%	0%	91%	98%	98%	0%	0%	95%	0%	96%	94%	0%	0%	0%	93%	91%	93%	93%	95%	100%	106%	115%	127%	121%	107%	106%	0%	0%	105%	0%	100%	100%	100%	99%	106%	0%		
AM	78%	79%	79%	80%	80%	80%	82%	75%	74%	74%	74%	86%	90%	87%	81%	78%	82%	74%	76%	81%	78%	77%	74%	80%	78%	75%	76%	80%	79%	77%	80%	80%	83%	82%	80%	76%	73%	80%	76%	82%	82%	82%		
BA	76%	77%	78%	79%	77%	76%	76%	74%	72%	72%	71%	74%	76%	76%	76%	76%	75%	74%	76%	76%	76%	75%	76%	77%	77%	78%	78%	76%	76%	75%	72%	78%	78%	78%	78%	78%	78%	78%	79%	81%	77%	83%	83%	83%
CE	80%	82%	82%	82%	79%	80%	81%	82%	77%	76%	77%	79%	81%	82%	80%	80%	81%	83%	85%	83%	82%	82%	83%	79%	79%	80%	81%	85%	90%	86%	84%	82%	81%	81%	80%	80%	80%	79%	82%	84%	86%	90%	91%	
DF	82%	82%	84%	83%	81%	76%	74%	72%	68%	69%	73%	77%	79%	78%	77%	76%	75%	75%	74%	74%	74%	74%	75%	75%	77%	80%	82%	85%	81%	75%	73%	72%	74%	77%	77%	76%	74%	81%	80%	81%	84%	81%		
ES	85%	89%	88%	88%	85%	79%	79%	79%	76%	76%	79%	80%	80%	81%	81%	80%	81%	81%	83%	80%	80%	80%	81%	80%	81%	84%	87%	92%	91%	87%	84%	81%	86%	84%	83%	80%	79%	85%	83%	86%	87%	87%		
GO	67%	67%	69%	68%	61%	61%	60%	60%	60%	62%	63%	68%	68%	67%	66%	67%	65%	63%	62%	63%	65%	67%	68%	69%	71%	72%	69%	66%	68%	69%	65%	64%	67%	67%	70%	68%	69%	72%	70%	74%	74%	72%		
MA	87%	89%	89%	91%	88%	84%	84%	83%	81%	80%	83%	85%	87%	89%	85%	84%	84%	82%	83%	84%	84%	83%	82%	81%	82%	85%	88%	92%	91%	89%	86%	84%	84%	84%	84%	83%	80%	86%	89%	87%	89%	88%		
MT	60%	61%	63%	70%	65%	58%	57%	56%	57%	60%	60%	60%	59%	58%	59%	58%	59%	55%	54%	58%	60%	57%	57%	61%	65%	67%	70%	64%	63%	62%	61%	60%	66%	69%	72%	70%	67%	72%	67%	71%	72%	69%		
MS	79%	80%	83%	85%	83%	76%	76%	75%	74%	75%	78%	81%	82%	83%	84%	83%	82%	80%	81%	82%	82%	82%	83%	84%	83%	80%	83%	80%	79%	78%	76%	74%	73%	71%	73%	73%	71%	70%	75%	73%	78%	79%	78%	
MG	71%	72%	72%	70%	65%	64%	63%	60%	60%	62%	64%	64%	65%	65%	67%	67%	65%	62%	62%	62%	62%	63%	64%	67%	68%	70%	70%	67%	65%	66%	66%	65%	65%	66%	69%	68%	68%	72%	68%	74%	75%	72%		
PA	85%	85%	86%	86%	84%	82%	81%	80%	79%	78%	80%	82%	83%	85%	84%	84%	82%	82%	81%	82%	82%	81%	82%	82%	84%	85%	86%	90%	92%	89%	86%	84%	88%	90%	89%	85%	83%	85%	86%	90%	92%	92%		
PB	77%	76%	78%	80%	77%	77%	79%	78%	73%	69%	69%	70%	72%	73%	76%	79%	81%	80%	80%	80%	79%	76%	74%	71%	72%	74%	77%	82%	86%	81%	77%	75%	74%	74%	75%	76%	76%	81%	83%	85%	89%	89%		
PR	74%	75%	75%	74%	68%	68%	66%	63%	64%	66%	68%	69%	70%	70%	73%	72%	70%	67%	68%	69%	69%	70%	71%	73%	74%	75%	76%	73%	71%	72%	72%	71%	74%	76%	76%	74%	73%	77%	73%	80%	80%	79%		
PE	74%	75%	78%	78%	76%	76%	77%	78%	74%	71%	71%	72%	74%	75%	76%	79%	82%	80%	81%	82%	81%	77%	76%	73%	75%	78%	80%	86%	86%	80%	78%	77%	79%	78%	75%	76%	76%	82%	83%	85%	88%	88%		
PI	79%	82%	83%	83%	79%	75%	76%	75%	73%	72%	72%	74%	75%	76%	76%	77%	78%	76%	76%	76%	75%	75%	75%	75%	76%	78%	80%	83%	82%	77%	76%	76%	77%	77%	78%	77%	76%	78%	77%	81%	83%	83%		
RJ	78%	79%	79%	79%	74%	72%	70%	67%	67%	68%	70%	71%	75%	77%	80%	80%	79%	77%	77%	78%	79%	80%	81%	82%	84%	85%	85%	82%	81%	80%	80%	79%	79%	82%	82%	80%	79%	84%	80%	84%	85%	84%		
RN	78%	78%	78%	81%	81%	80%	82%	80%	76%	75%	76%	77%	79%	80%	79%	79%	78%	82%	82%	85%	82%	80%	80%	78%	77%	79%	81%	85%	88%	83%	81%	80%	79%	78%	79%	78%	78%	80%	84%	87%	92%	88%		
RS	90%	92%	93%	94%	90%	86%	85%	83%	82%	82%	85%	88%	91%	93%	91%	89%	89%	89%	89%	90%	91%	90%	89%	89%	90%	94%	97%	102%	104%	100%	95%	94%	89%	93%	93%	91%	89%	89%	93%	94%	94%	97%	96%	
RO	81%	82%	82%	87%	87%	84%	83%	81%	80%	81%	84%	86%	88%	88%	86%	83%	81%	83%	85%	85%	83%	81%	82%	81%	84%	83%	85%	88%	90%	87%	85%	84%	77%	78%	82%	80%	79%	81%	82%	82%	85%	87%		
RR	86%	88%	90%	88%	87%	88%	91%	90%	84%	86%	90%	95%	98%	98%	95%	89%	85%	89%	93%	95%	93%	91%	91%	90%	90%	93%	95%	102%	102%	98%	93%	89%	85%	86%	88%	86%	84%	82%	85%	85%	90%	89%		
SC	86%	89%	90%	91%	87%	83%	84%	83%	80%	80%	82%	85%	86%	87%	87%	87%	86%	87%	89%	89%	89%	87%	87%	85%	86%	87%	89%	93%	92%	88%	85%	84%	87%	86%	85%	84%	82%	88%	91%	92%	92%	92%		
SP	71%	72%	72%	70%	64%	64%	60%	58%	59%	61%	63%	64%	65%	66%	69%	68%	65%	62%	62%	64%	64%	65%	67%	68%	69%	70%	70%	66%	64%	65%	65%	64%	68%	71%	71%	71%	70%	74%	69%	76%	77%	75%		
SE	78%	82%	86%	88%	84%	85%	84%	80%	74%	72%	73%	73%	77%	79%	80%	80%	83%	83%	83%	84%	83%	78%	72%	71%	75%	78%	84%	85%	87%	83%	80%	78%	75%	78%	78%	77%	75%	78%	80%	85%	89%	88%		
TO	81%	82%	83%	83%	81%	76%	77%	76%	74%	75%	77%	81%	82%	83%	83%	82%	81%	80%	80%	80%	81%	79%	78%	78%	80%	81%	82%	86%	84%	81%	79%	77%	72%	77%	77%	76%	75%	81%	83%	84%	88%	87%		

# Paridade do preço bomba Etanol Hidratado em relação a Gasolina C

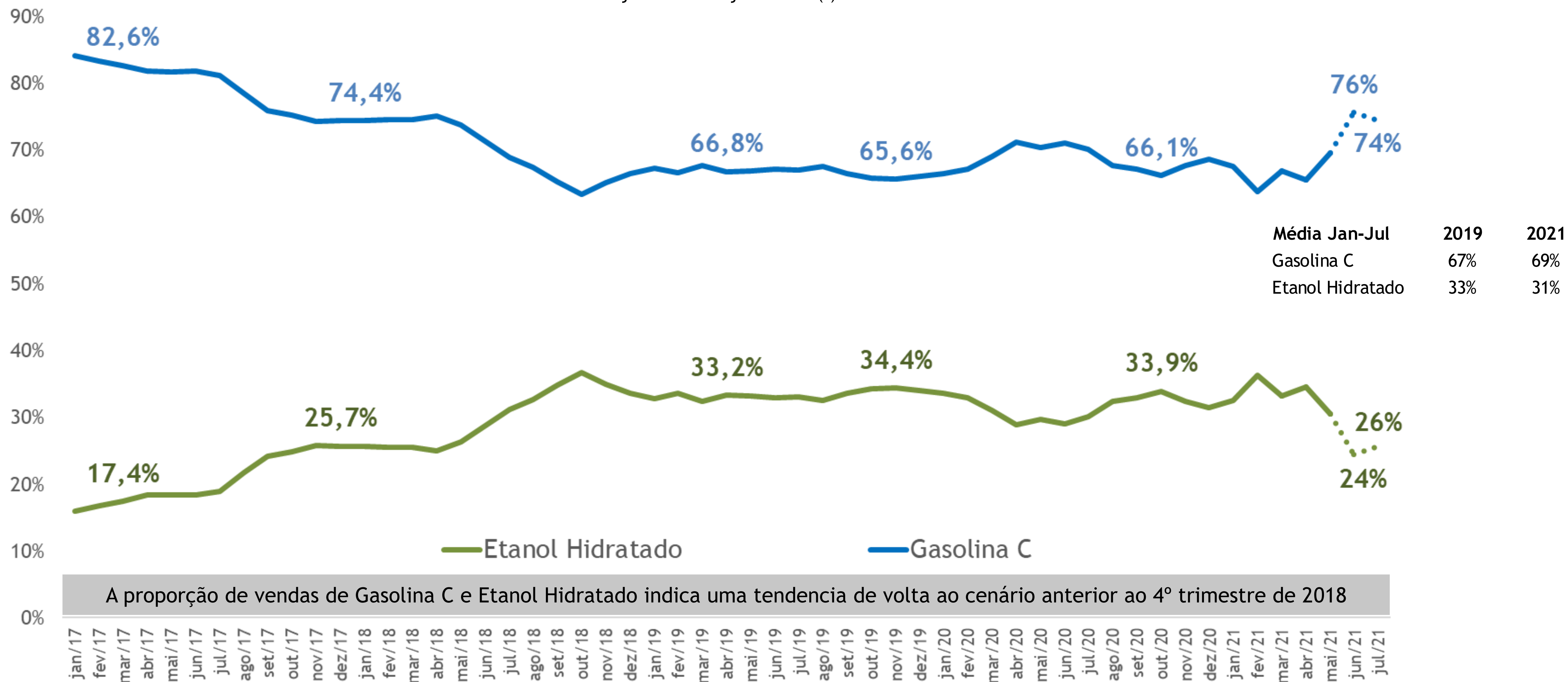


## 2. Vendas



# Mix de vendas das associadas IBP

Mix Gasolina C / Etanol Hidratado (%)  
janeiro/2017-julho/2021(\*)



A proporção de vendas de Gasolina C e Etanol Hidratado indica uma tendencia de volta ao cenário anterior ao 4º trimestre de 2018

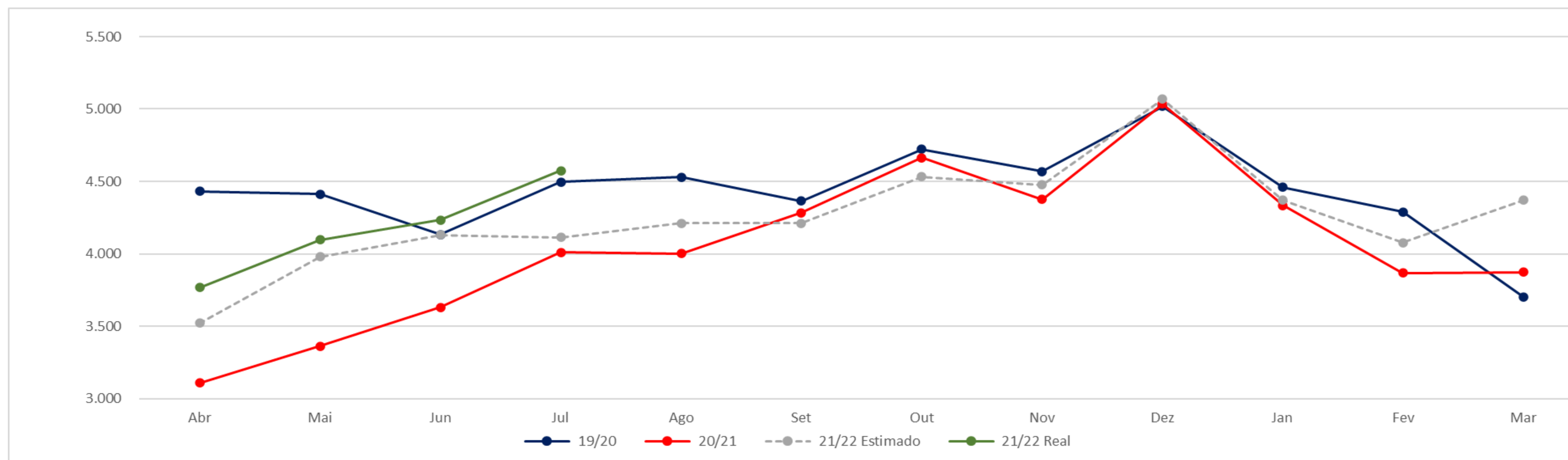


# Vendas de combustíveis do Ciclo Otto - Mercado Total

Estimativas não vinculantes - Ano Safra



Mil m<sup>3</sup> mensais de gasolina equivalente



Safra	Abr	Mai	Jun	Jul	Ago	Set	Out	Nov	Dez	Jan	Fev	Mar	Total
19/20	4.432	4.412	4.132	4.496	4.529	4.363	4.721	4.568	5.017	4.460	4.290	3.703	<b>53.122</b>
20/21	3.109	3.363	3.631	4.009	4.001	4.284	4.664	4.377	5.034	4.334	3.867	3.874	<b>48.547</b>
21/22 Estimado	3.520	3.980	4.130	4.113	4.212	4.211	4.532	4.477	5.067	4.371	4.076	4.369	<b>51.057</b>
21/22 Real	3.768	4.096	<b>4.234</b>	<b>4.575</b>									

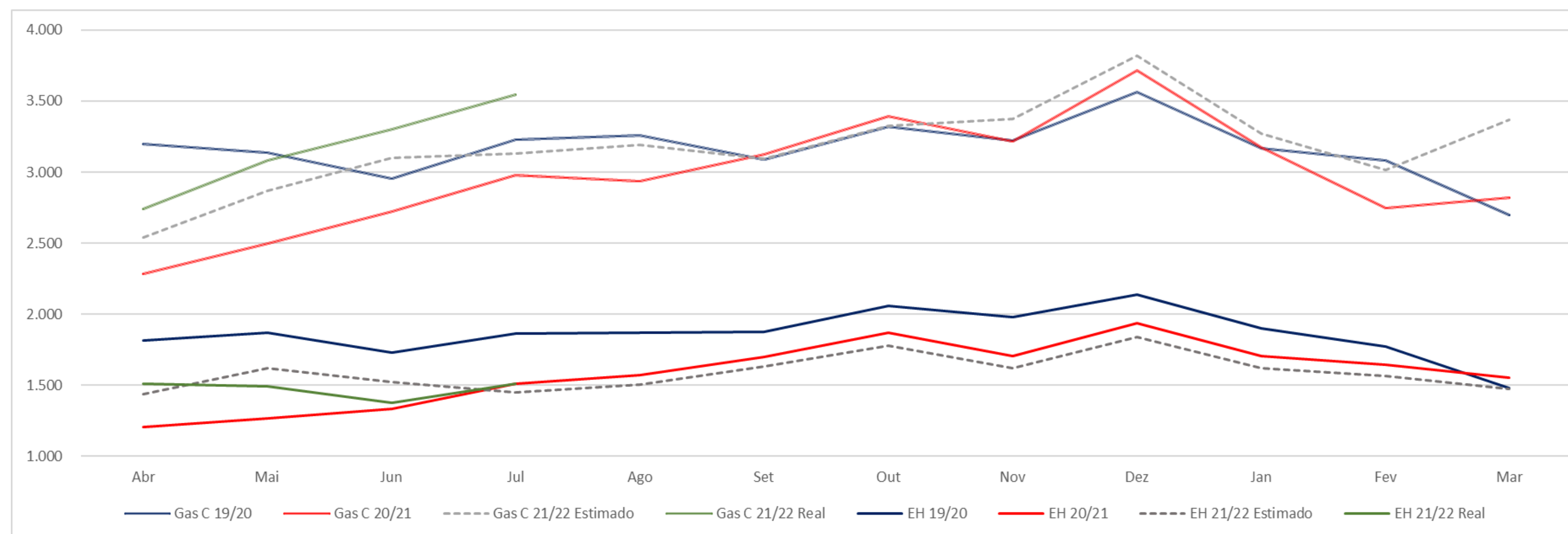
Nota: )¹) Valor de junho e julho estimado com base em dados preliminares das associadas.  
Fonte: Análise IBP

# Vendas de combustíveis do Ciclo Otto - Gasolina C e EH

Estimativas não vinculantes - Ano Safra



Mil m<sup>3</sup> mensais



Safra	Abr	Mai	Jun	Jul	Ago	Set	Out	Nov	Dez	Jan	Fev	Mar	Total
Gas C 21/22 Estimado	2.540	2.870	3.100	3.129	3.192	3.095	3.324	3.377	3.818	3.270	3.013	3.367	38.094
Gas C 21/22 Real	2.738	3.080	<b>3.300</b>	<b>3.548</b>									-
<b>Assertividade</b>	<b>8%</b>	<b>7%</b>	<b>6%</b>	<b>13%</b>									
EH 21/22 Estimado	1.440	1.620	1.520	1.450	1.507	1.633	1.776	1.617	1.838	1.619	1.563	1.474	19.057
EH 21/22 Real	1.513	1.494	<b>1.374</b>	<b>1.512</b>		-	-	-	-	-	-	-	-
<b>Assertividade</b>	<b>5%</b>	<b>-8%</b>	<b>-10%</b>	<b>4%</b>									

Nota: )<sup>1</sup>) Valor de junho e julho estimado com base em dados preliminares das associadas.  
Fonte: Análise IBP



**Ana Mandelli**

ana.mandelli@ibp.org.br

**(21) 99162-2884**



/ibpbr



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