The Latin America Consumer Market
A Roadmap for Strategic Market Positioning
The Latin America Consumer Market

“They are members of a new middle class that is emerging almost overnight across Brazil and much of Latin America. Tens of millions of such people are the main beneficiaries of the region’s hard-won economic stability and recent economic growth.”

– The Economist

- US$5.7 trillion – size of the economy
- 568 million consumers
- US$3.72 trillion – consumer buying power
- Large and vibrant metropolitan markets, including: Mexico City, Sao Paulo, Buenos Aires, Lima, Bogota, Santiago, Caracas
- Growing urban middle class
- The Latin American economy has grown steadily over the last five years, and experienced its best performance since the 1970s
- World-class multinational corporations operating in the market
- The economic expansion has been increasingly reliant upon domestic demand and improvements in the business environment

### GDP 2012 (est.)

<table>
<thead>
<tr>
<th>Country</th>
<th>US$ billions</th>
<th>Growth %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>2,449.8</td>
<td>3.0</td>
</tr>
<tr>
<td>Mexico</td>
<td>1,207.8</td>
<td>3.6</td>
</tr>
<tr>
<td>Argentina</td>
<td>472.8</td>
<td>4.2</td>
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<tr>
<td>Colombia</td>
<td>378.7</td>
<td>4.7</td>
</tr>
<tr>
<td>Venezuela</td>
<td>337.4</td>
<td>4.7</td>
</tr>
<tr>
<td>Chile</td>
<td>272.1</td>
<td>4.3</td>
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<tr>
<td>Peru</td>
<td>185.0</td>
<td>5.5</td>
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<td>Ecuador</td>
<td>72.5</td>
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<td>Dominican Republic</td>
<td>59.4</td>
<td>4.5</td>
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<tr>
<td>Uruguay</td>
<td>52.3</td>
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<tr>
<td>Guatemala</td>
<td>50.3</td>
<td>3.1</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>44.3</td>
<td>4.0</td>
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</table>
The 2013 Latin America Consumer Market Study is a reference book that presents unique up-to-date information about the consumer market in Latin America.

This book constitutes a definite source of information for multinational corporations and investors based in the United States and other countries that are currently doing or want to do business in and with Latin America.

The study provides comprehensive information based on original research, proprietary modeling tools, and an analytical framework developed by Cambridge Insight. The information is presented according to three levels of analysis: consumer mapping, consumer market infrastructure, and consumer business environment.

The study profiles 18 countries: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, and Venezuela.

The study presents information regarding 70 major metropolitan markets of Latin America.

The study is a unique tool for: strategic planning, foreign direct investment decision making, market entry strategies, scanning the business environment, measuring market demand, developing market strategies, redefining market offerings, benchmarking, identifying market segments, selecting target markets, analyzing consumer markets, market forecasting, and media and market research budgeting.
Study Content: Consumer Market Analytical Framework

Levels of Analysis
- Consumer Mapping
- Market Infrastructure
- Business Environment

Analytical Categories
- Population Profile
- Consumer Buying Power
- Physical Infrastructure
- Education & Health
- Economic Growth & Inflation
- Foreign Trade & Finance
- Household Characteristics
- Consumption Patterns
- Environmental Protection
- Communication Networks
- Foreign Direct Investment
- Technology

Market Drivers
- Population Dynamics
- Urbanization Process
- Economic Development

Market Infrastructure
- Population Dynamics
- Population Dynamics
- Urbanization Process
- Economic Development

Consumer Mapping
- Population Dynamics
- Population Dynamics
- Urbanization Process
- Economic Development

Business Environment
- Population Dynamics
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- Urbanization Process
- Economic Development

Economic Growth & Inflation
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- Economic Development

Foreign Trade & Finance
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Consumption Patterns
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Economic Development
Study Content: Consumer Mapping

The 2013 Latin American Consumer Market Study provides information for each country covering variables such as:

- **Demographic Trends**: Population, population growth, urban-rural population, population distribution, population media age, population density, population by regions, and population for 70 major metropolitan markets.

- **Households**: Number of households, urban and rural households, average household size, family household structure, urban households by socioeconomic strata.

- **Buying Power**: Total buying power, urban and rural buying power, average buying power per household, urban buying power by socioeconomic strata, and average urban buying power by socioeconomic strata.

- **Consumption Patterns**: Total, urban, and rural household consumption expenditure by category – food, clothing, residence, education, healthcare & medical, transportation & communication, among others.

$3.72 Trillion Household Buying Power (USD billions)
Study Content: Market Infrastructure

The 2013 Latin American Consumer Market Study provides information for each country covering, among other variables:

- **Physical Infrastructure**: Roads, railroads, airports, ports, energy use.
- **Education and Health Characteristics**: Expenditures on education, school enrollment, ratio female to male enrollment, literacy, graduates, infant mortality, morbidity rates.
- **Environmental Protections**: CO2 emissions, access to electricity, forest area.
- **Communications Networks**: Telephone lines, internet connections, media, mobile and fixed-line telephone subscribers, mobile cellular subscriptions.

$3.72 Trillion Consumer Buying Power, 2012 (est.)
(Percent of total)

Main Metropolitan Markets

- Brazil 40%
- Mexico 23%
- Argentina 9%
- Colombia 7%
- Venezuela 6%
- Other 5%
- Peru 3%
- Ecuador 1%
- Dominican Republic 1%

Less than 5 million
Between 5 and 12 million
More than 12 million
The 2013 Latin American Consumer Market Study provides information for each country covering variables in area of:

- **Economic Growth & Inflation:** GDP growth, GDP current prices, GDP constant prices, income per capita, remittances, inflation.

- **Foreign Trade & Finance:** Total exports, total imports, exports to U.S., imports from U.S., exchange rates.

- **Foreign Direct Investment:** FDI net inflows.

- **Technology:** Patents, R&D expenditures, high-tech exports.

### 2012 (est.)

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<tr>
<th>Country</th>
<th>GDP (US$ billions)</th>
<th>GDP Per Capita (US$)</th>
<th>Buying Power (US$ billions)</th>
<th>Buying Power Per Household (US$ billions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>2,449.8</td>
<td>12,465</td>
<td>1,473</td>
<td>24,581</td>
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<td>Mexico</td>
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<td>Argentina</td>
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<td>25,888</td>
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<td>Colombia</td>
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<td>8,127</td>
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<td>Venezuela</td>
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<td>29,851</td>
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<tr>
<td>Chile</td>
<td>272.1</td>
<td>15,453</td>
<td>176</td>
<td>31,719</td>
</tr>
</tbody>
</table>

U.S. Exports to Select Latin American Countries 2011 (USD millions)
Characteristics of the Study


- A single source for otherwise decentralized Latin America market information. Variables presented in U.S. dollars to facilitate comparisons.

- Proprietary data based on research in Latin America and secondary research via global network of research institutions.

- Target audience of U.S.- and European-based MNCs and investors.

- Clear, easy-to-read format that facilitates analysis and market trends and forecasts.

- Includes a CD-ROM with key graphs and tables.

- The Latin America Consumer Market Study will be released on an annual basis. The 2013 edition will be launched in January 2013.

- 1,000 copies will be printed. Circulation will be through direct sales.
Contact Information

Cambridge Insight is the leading source of analysis and information on conditions and developments in Latin America that impact global business. We deliver our insights primarily through The Latin America Consumer Market Study and consulting. What ties Cambridge Insight together is the originality of the research, the independence of the opinions expressed, the freshness of the perspective, and the commitment for excellence.

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