

BRAZIL

GDP: US\$2.34t 2014
(Source: Central Bank of Brazil)

Population: 200m (2014 est.)

Total Exports
US\$225b 2014
(Source - Central Bank of Brazil)

Total Imports
US\$229b 2014
(Source - Central Bank of Brazil)

Capital:
Brasilia

Airports

- 1 Eduardo Gomes
- 2 Pinto Martins – Fortaleza
- 3 Petrolina
- 4 Deputado Luís Eduardo Magalhães
- 5 Tancredo Neves
- 6 Rio de Janeiro/Galeão
- 7 Guarulhos
- 8 Viracopas
- 9 Afonso Pena
- 10 Salgado Filho

Ports

- 1 Porto de Aratu
- 2 Port of Vitória
- 3 Port of Rio de Janeiro
- 4 Porto de São Sebastião
- 5 Port of Santos
- 6 Port of Paranaguá
- 7 Port of Itajaí
- 8 Port of Rio Grande

Strengths

Brazil's net government debt as a % of GDP is only 35.2%. The US is at 87.9%

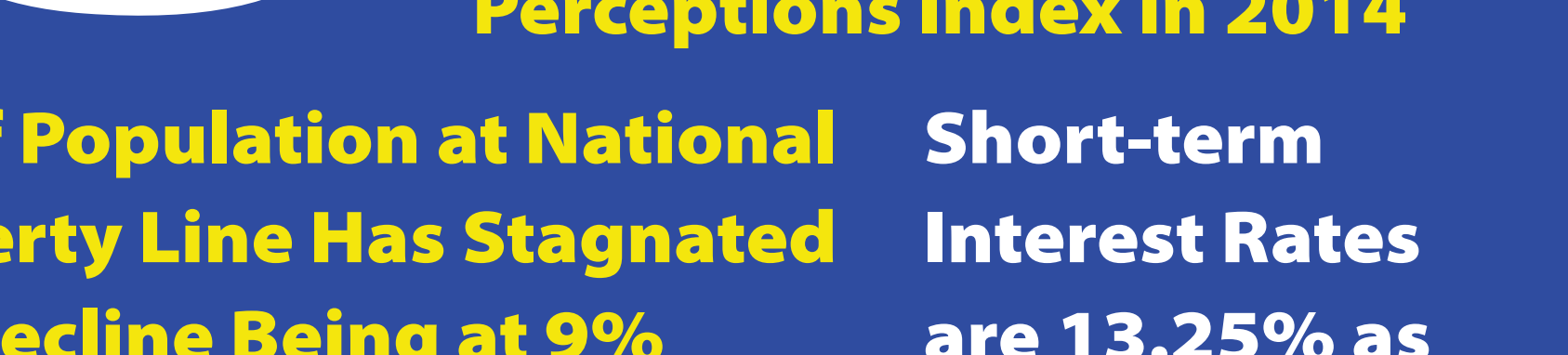
Free Trade Zones

Brazil's % of population at the poverty line has shrunk from 21% in 2005 to 9% in 2012

(Source - World Bank)

Unemployment in Brazil has fallen from over 8% in 2009 to 5.9% in 2013 estimate

(Source - World Bank)



Weaknesses



Brazil Ranked Most Time-Consuming Tax Regime In The World (Source: PwC)

Brazil Was 69 Out of 174 Countries on Corruption Perceptions Index in 2014

% of Population at National Poverty Line Has Stagnated its Decline Being at 9% 2012, 8.9% 2013

(Source: World Bank)

Short-term Interest Rates are 13.25% as of April 30th, 2015

Opportunities

Top 5 Products Exported by Brazil:

- 1: Iron Ore (13%)
- 2: Crude Petroleum (8.4%)
- 3: Soybeans (7.0%)
- 4: Raw Sugar (5.3%)
- 5: Poultry Meat (2.8%)

Top 5 Export Destinations of Brazil:

- 1: China (17%)
- 2: United States (11%)
- 3: Argentina (7.2%)
- 4: Netherlands (5.4%)
- 5: Germany (3.9%)

Top 5 Products Imported by Brazil:

- 1: Petroleum (7.3%)
- 2: Crude Petroleum (5.7%)
- 3: Cars (4.3%)
- 4: Vehicle Parts (3.1%)
- 5: Petroleum Gas (2.7%)

Top 5 Import Origins of Brazil:

- 1: China (15%)
- 2: United States (14%)
- 3: Argentina (7.4%)
- 4: Germany (6.6%)
- 5: South Korea (4.6%)

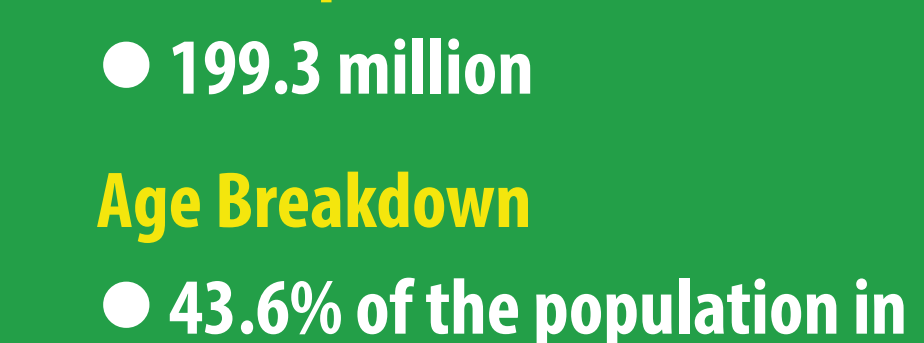
Brazil to invest US\$800b in infrastructure between 2013 and 2017

A Growing Force

Brazil's expanding and increasingly educated middle class is exerting a larger influence on electoral politics as its priorities change.

Share in each income group*

Lower class Middle Upper



Share of middle class with a college education or higher



Share of middle class who say these top problems need to be fixed



*Brazilian economists define the middle class as those earning about \$900–\$3,800 a month. Source: Data Popular surveys, most recent of 2,503 people conducted in June; margin of error: +/- 1.9 pct. pts. The Wall Street Journal

Total Population

- 199.3 million

Age Breakdown

- 43.6% of the population in Brazil are between 25 and 54

Religion

- The most prominent religion in Brazil is Catholic, at 73%

Urban Population

- 85%

Internet Penetration

- 51.6%

Mobile Penetration

- 136%

Tablet Penetration

- 12%

Smartphone Penetration

- 20.1%
- Brazil has the highest smartphone penetration in the LATAM region

Online Shoppers

- 51.3 million

Ecommerce Sales

- USD 12.8 billion (BRL 28.8 billion)
- 51.3 million Brazilians made at least one digital purchase last year, a 21.6% year-over-year increase and almost three times the amount recorded in 2009

Ecommerce Penetration

- 39.8%

Ecommerce CAGR (2008 – 2013)

- 17.6%

Mobile Commerce

- Brazilian mobile commerce accounts for 4.8% of total ecommerce transactions, approximately USD 614 million (BRL 1.4 billion) value
- 40.8% of Brazilian mobile users access the internet using their phones
- Long page-loading times in Brazil were the main barrier to more mobile purchases, according to 32.1% of smartphone users
- With 53% estimated annual growth over the next five years, the value of Brazil's mobile cross-border transactions is expected to increase to nearly USD 2.5 billion (BRL 5.6 billion) in 2018
- 40.8% of smartphone buyers in Brazil made purchases via their devices at least once a week

Mobile OS Platforms

- Android is the preferred mobile operating system in Brazil, with 60.44% share

Source: www.thepayers.com/ecommerce-facts-and-figures/brazil/7

Investment

World Cup & 2016 Olympics has led to Brazil's largest logistics investment programme

Roads: Estimated investment: **US\$23 billion** with 7,000km of road concessions

Ports: Estimated investment: **US\$27.3 billion**

Railways: Estimated investment: **US\$49.8 billion** with construction and/or upgrading of over 11,000 km of rail lines

Threats

GDP growth has declined from 2.5% in 2013 to .1% in 2014. The World Bank forecasts a recovery to 1% in 2015

Total exports have shrunk by 7% in 2014 and 10.5% by April 2015

Inflation hit almost a twelve-year high in March – 8.13%

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