



Business Insights

For a clearer market perspective

Emerging Food and Drinks Markets in Latin America

Fast growth and maturing
countries and product markets



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About Us



Business Insights' portfolio of consumer goods management reports is designed to help you make well informed and timely business decisions. We understand the problems facing today's consumer goods executives when trying to drive your business forward, and appreciate the importance of accurate, up-to-date, incisive product, market and company analysis.

The **strength of our consumer goods research and analysis** is derived from access to unparalleled databases and libraries of information and the use of proprietary analytic techniques. Business Insights reports are authored by independent experts and contain findings acquired from dedicated primary research. Our authors' leading positions secure them access to interview key executives and to establish which issues will be of greatest strategic significance for the industry.

Our consumer goods portfolio of reports can be used across a wide range of business functions to assess market conditions and devise future strategies and cover the **food and drinks, ingredients, packaging, health, toiletries and cosmetics** categories and key consumer issues including **eRetail** and **marketing**.

Report overview

Latin America is experiencing wide scale demographic changes and unprecedented levels of urbanization. The region largely suffers from low per capita expenditure with many countries suffering wide scale poverty.

The report provides a scorecard that measures the most promising markets. Some of the top-rated countries are then explored in more depth, providing insight into the opportunities and risks in their food and drinks markets. 'Emerging Food and Drinks Markets in Latin America' is a new management report published by Business Insights that assesses Latin America across eight food and drinks metrics, including market size, market growth, per capita spend, population, market intensity, commercial infrastructure and social structures. Each market is rated for each individual metric and an overall score produced to allow a final ranking. Key countries are examined in depth to assess the risks and opportunities in their food and drinks markets.

This analysis has enabled Business Insights to analyze the market attractiveness and maturity of eight countries, in order to identify future growth opportunities and risks for food and drinks manufacturers.

Pages 137

Figures 60

Tables 10

"Use this report to identify key trends in each market, indicating levels of innovation and NPD opportunities for food and drinks manufacturers that are in or want to enter that country."

Key findings...

Regulatory rules tightened during the recession protect domestic producers and limit potential of new players who do not secure affiliations with local companies.

Much of Latin America is characterized by a relatively young age profiles. Younger consumers bring many demands but are receptive to new products and marketing, and will challenge traditions more readily.

Penetration of new technologies is increasing in Latin America but typically remains behind the western world.

Future market growth is expected to marginally trail that of current levels although by category it is a more positive picture.

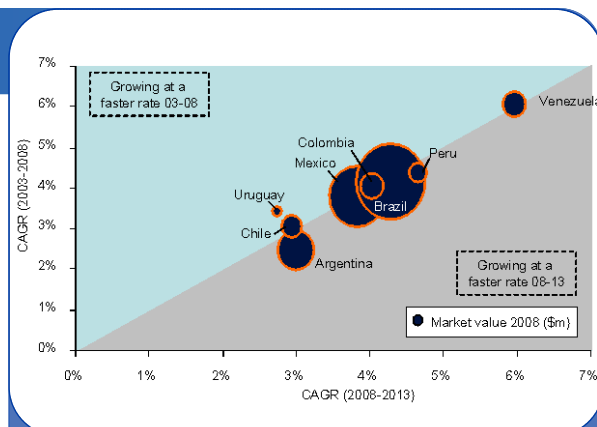


Figure 2.11: Historic and forecast country market growth (%), 2003-13

"Figure 2.11 shows the recent average growth in each country covered in the key food and drinks markets between 2003-2008 and 2008-2013. The relative size of each market is emphasized by the size of the bubble. A country offering previous fast growth isn't guaranteed to continue that way and the graph below allows opportunity to investigate this. The immediate outtake of the chart is that expected growth is likely to follow historic growth with most countries approximately sitting on a diagonal line from the base indicating consistent growth. Due to the recent global economic crisis future growth levels are predicted to be slightly below that of historic levels as consumers change and typically cut back their expenditure..."

Use this report to...

- Gain an easy to understand ranking of 8 emerging food and drinks markets.
- Gain insight to the food and drink manufacturer when deciding to enter a specific emerging food and drinks market.
- Analyze the key trends being followed in the top five emerging food and drinks markets.
- Analyze the key market drivers of emerging regions and the top 5 emerging food and drinks market.
- Analyze four specific food and drinks categories in the top 5 emerging food and drinks markets.

Research Methodology



Metrics. The most recent economic, commercial and social data for 8 developing countries were gathered to create a series of seven metrics deemed most relevant to the food and drinks market. These metrics were then weighted to reflect their relative importance to each sector.



Ranking. The final scores (on a scale of 1.0 to 100) were ranked from 1 to 8, giving each country both a rank and a score. Brazil scored 100 on the scorecard, and so was ranked first, while Uruguay scored 1.0 and therefore was ranked 8th. These ranks and scores were then analyzed in the context of relevant market drivers within the different regions and the top five scoring countries.

Countries studied:

Argentina	Columbia
Brazil	Peru
Mexico	Uruguay
Chile	Venezuela

The metrics and their respective weighting

Metric	Weighting
Food and drinks market size, \$m (2007)	20
Food and drinks market growth 2003-2007 (2007)	15
Per capita consumption of food and drinks, \$ (2007)	10
Population	10
Market intensity	20
Commercial infrastructure	15
Social structures	10

Source: Emerging Food and Drinks Markets

"The metric data detailed above were combined to create a single, comparable figure to represent the attractiveness of that country's food and drinks market. This produces a numerical score and rank for each of the 8 developing countries' food and drinks markets..."

Your questions answered...

- What are the most attractive emerging food and drinks markets in Latin America?
- Which countries in Latin America are the most attractive but present the most risk?
- Which food and drinks categories are most attractive in Latin America?
- Which trends are most apparent in the most attractive emerging food and drinks markets in Latin America?
- What seven metrics have been used in our analysis?
- Which of the eight countries present the most opportunity/risk for food and drinks manufacturers?
- What are the key market drivers in the most attractive emerging and mature food and drinks markets in Latin America?
- How are leading players in Latin America, driving growth and innovation in their particular categories?
- Which countries in Latin America are least attractive, but present little risk?

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