

## Free Seminar and Networking Reception

# Brazil, Mexico and Beyond – Opportunities and Challenges

Tuesday, October 5 • 4:30 p.m. – 6:00 p.m.  
Room: S103cd, McCormick Place South

Companies are looking to the world's emerging economies to expand during the slow domestic market. In recent years Mexico, Brazil and other Latin American markets have seen extraordinary growth and expansion driven by technology and business development. Expansion is a must to succeed in today's business climate.

NPES has put together a program of distinguished dignitaries to discuss opportunities and challenges in the Latin American marketplace. A networking reception will follow the panel discussion.

### Moderator:

**Mr. Hamilton Terni-Costa**  
NPES Latin American Director

### Speakers:

**Marlo Cesar de Camargo**  
President of Abigraf and Grafica Bandeirantes

**Luis E. Reynoso Vilches**  
Director Editorial BAZAR GRAFICO



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# Brazil, Mexico and Beyond

Opportunities and Challenges

Moderator: Hamilton Terni Costa

Speakers: Mario César de Camargo  
Luis Reynoso Vilches



Chicago Oct. 4, 2010



# LA overview

- Latin America is composed of South and Central America, Mexico and Caribbean
- 20 countries in LA and 13 in Caribbean
- 580 million inhabitants



# America: one continent

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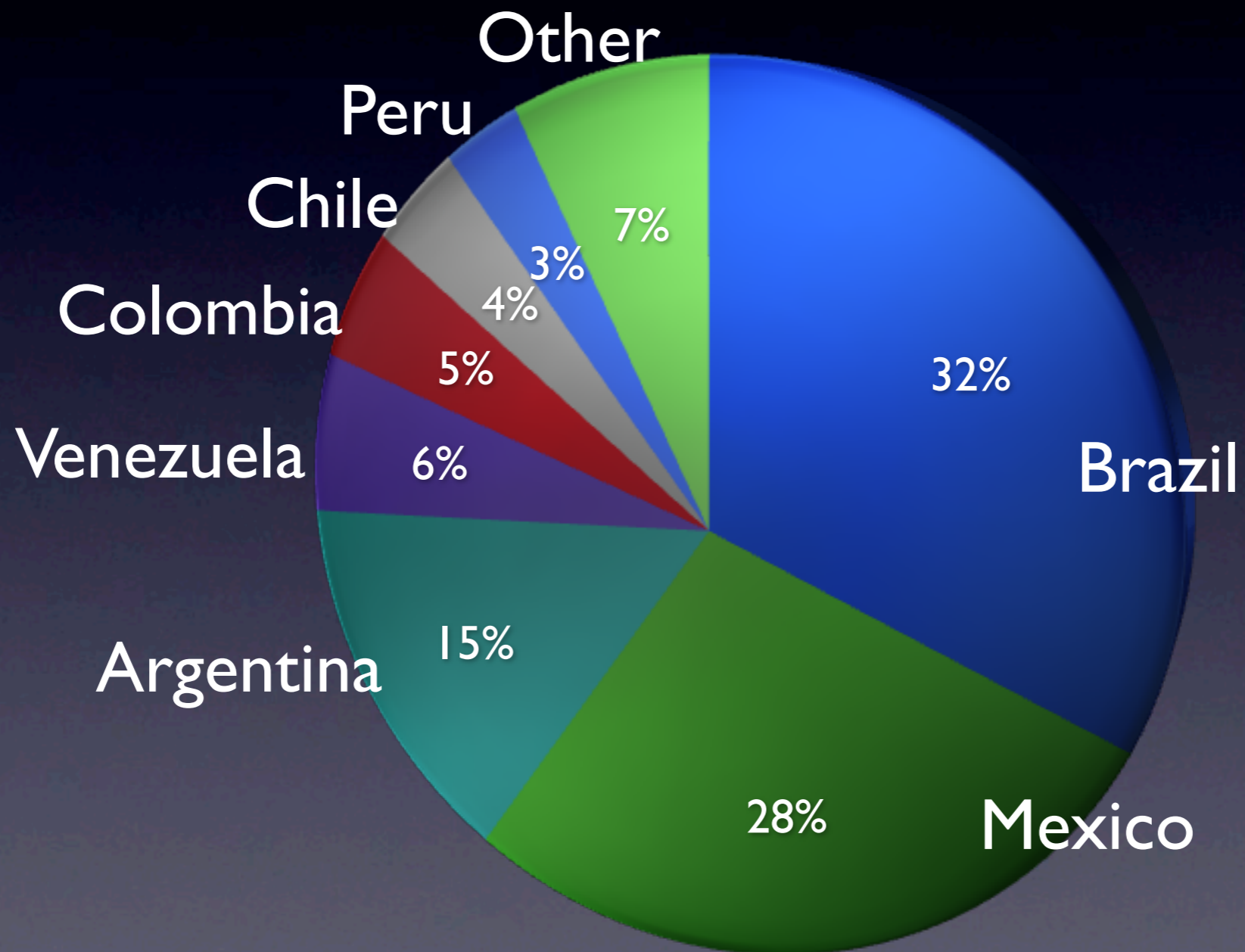
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# Economy size by country

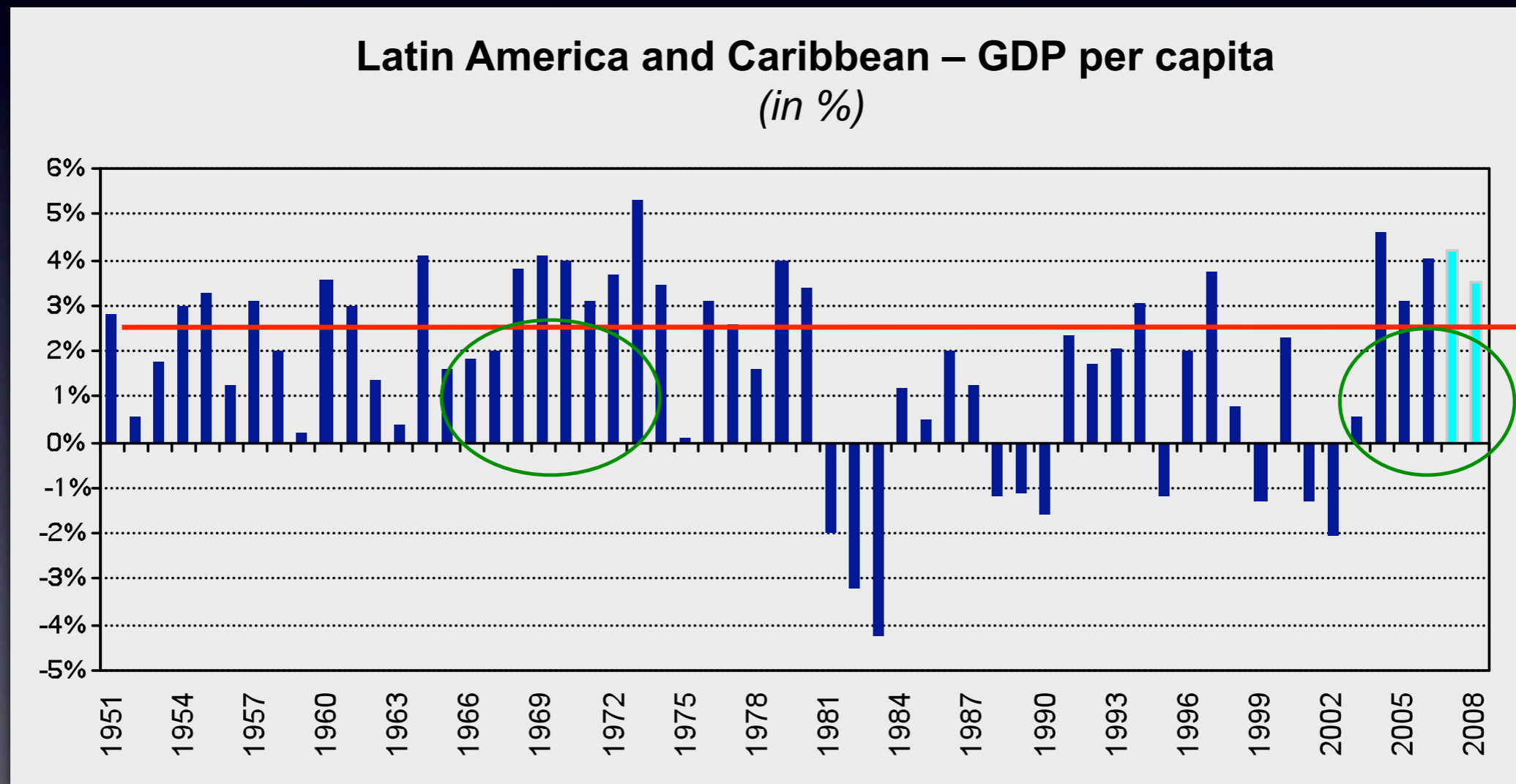
GDP share



Source: ECLAC 2008

# LA economics

The economic history of the region is noted for a sequence of ups and downs (roller coaster), instability and uncertainty.

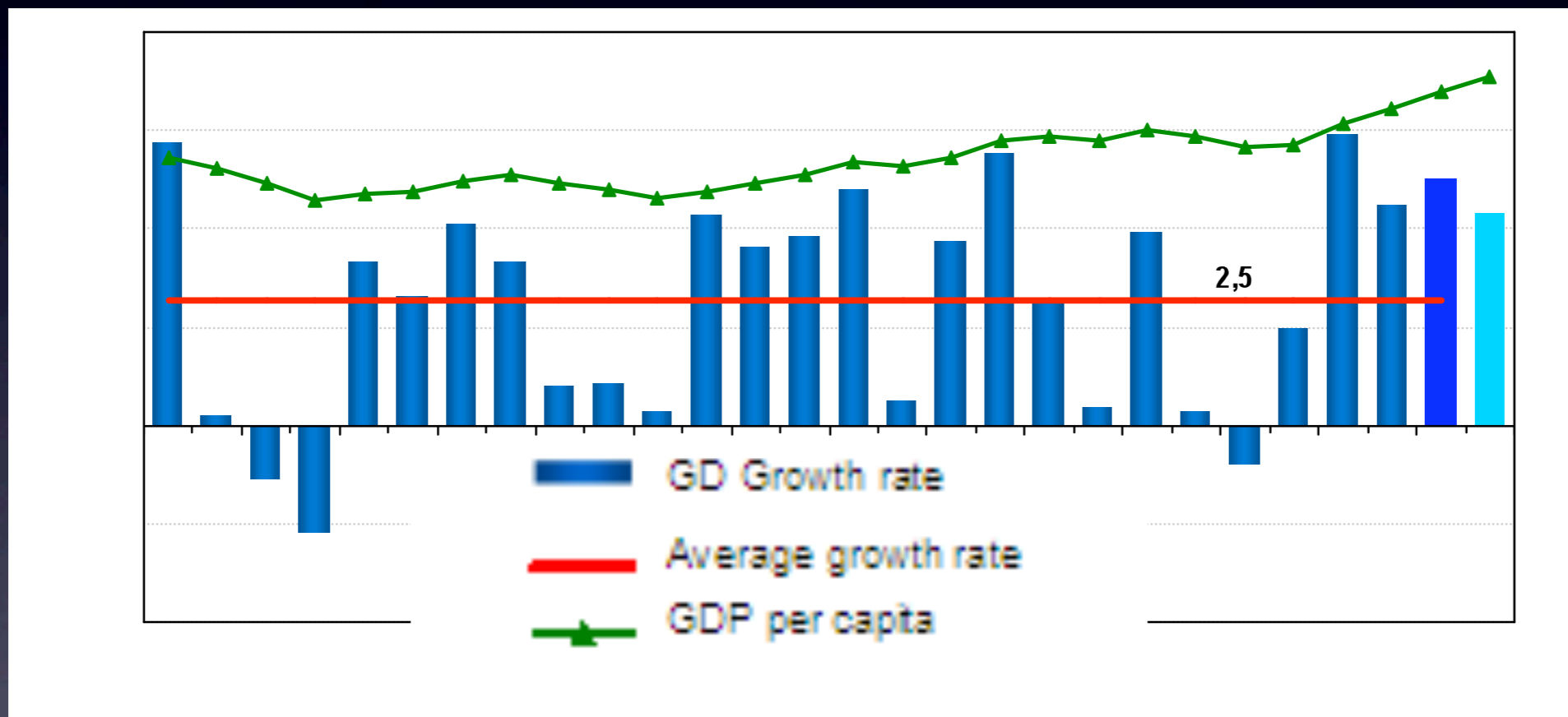


only 40 year ago we could see a consecutive growth as seem recently

source: ECLAC

## LA economics

Since 2002, however, with agricultural, metal and oil commodities, valorization of the region is growing consistently



income per capita is also growing consistently since 1990

# LA economics

- The poverty in the region is gradually shrinking.  
(still has 190 million people in poverty)
- The main economies: Brazil, Mexico, Argentina, Colombia, Chile and Peru are keeping a sustainable growth with different individual grades.
- Strengthening of the low to middle class



The  
Economist

SEPTEMBER 11TH-17TH 2010

Economist.com

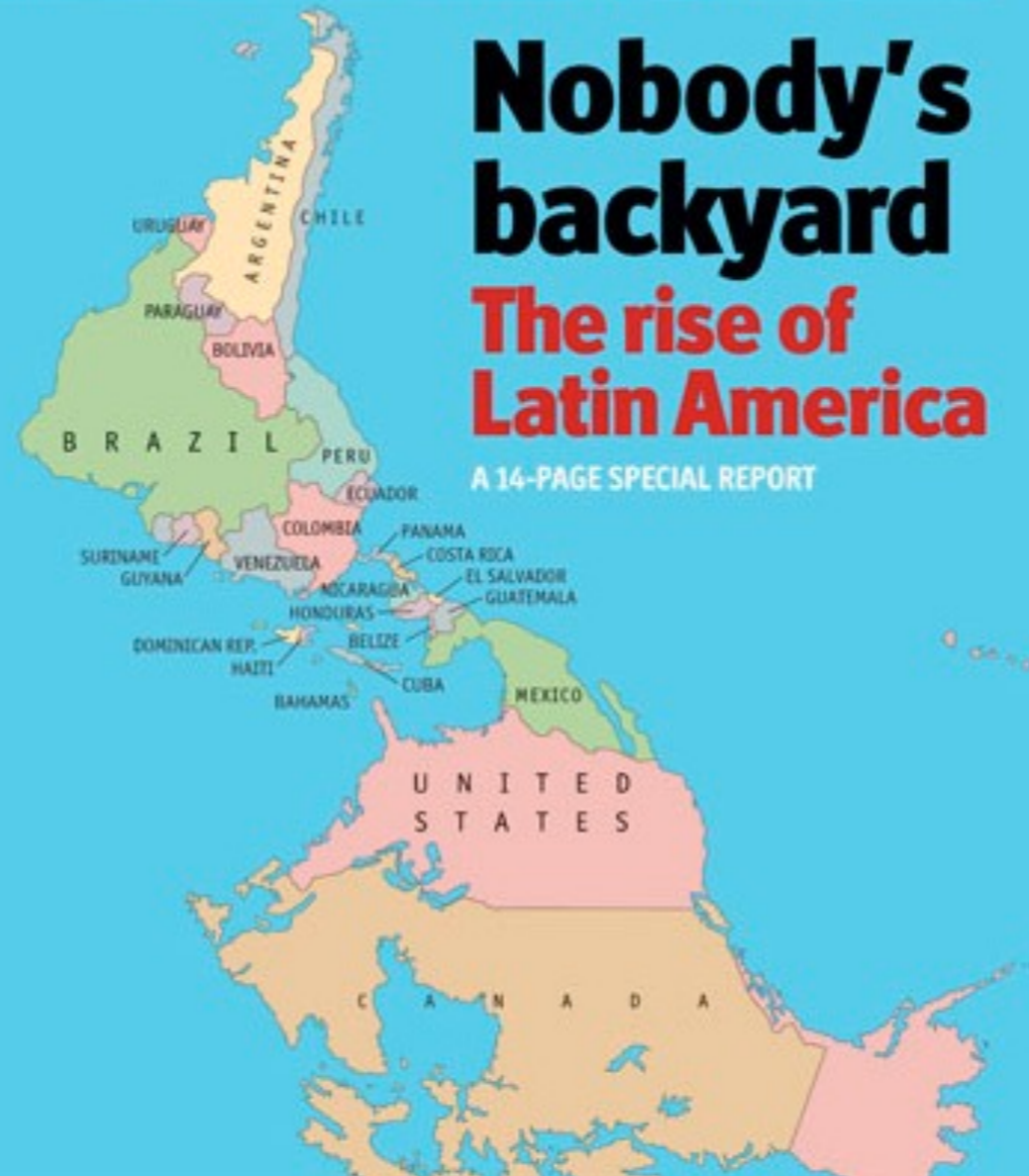
Obama's trouble with terrorism

France's incredible shrinking president

Siemens reborn

Damien Hirst's bubble bursts

Education, profit and pitfalls



# Nobody's backyard

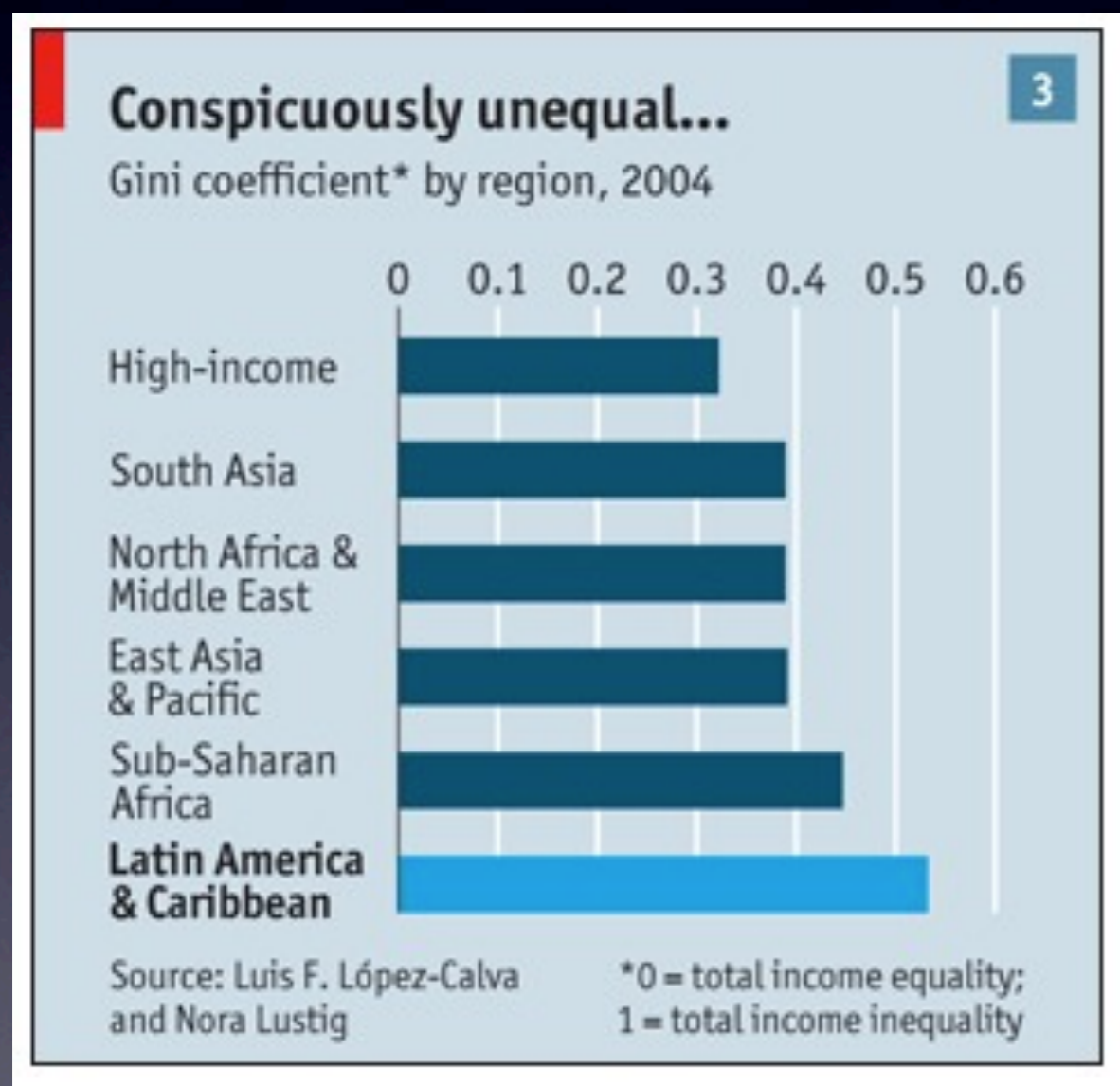
## The rise of Latin America

A 14-PAGE SPECIAL REPORT

# LA stabilisation

1. Economic policies (independent central banks, government expenditures control, inflation target rate, exchange rate floating)
  - people and enterprises can plan better
2. Democracy
  - weak but consistency

# still unequal but getting better

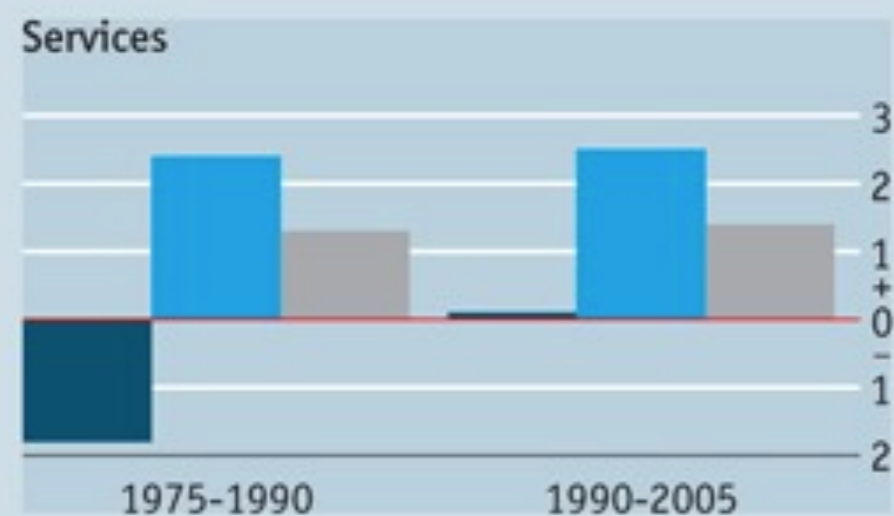
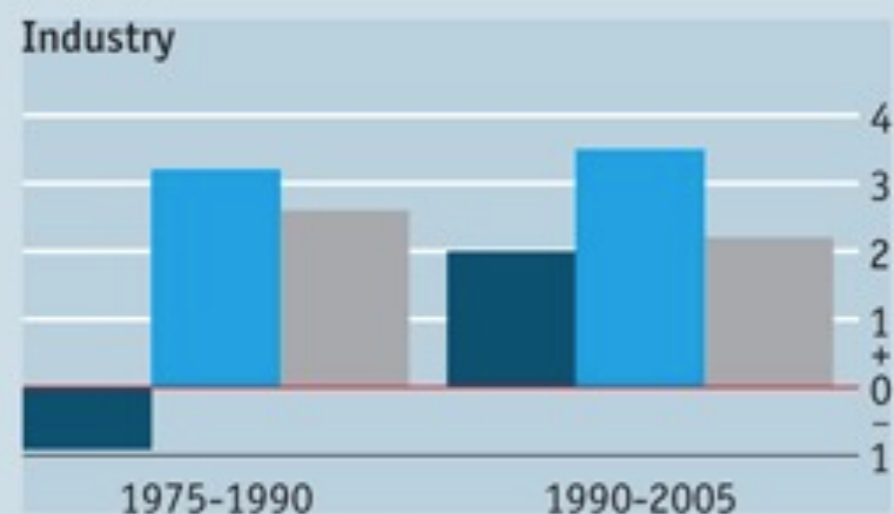
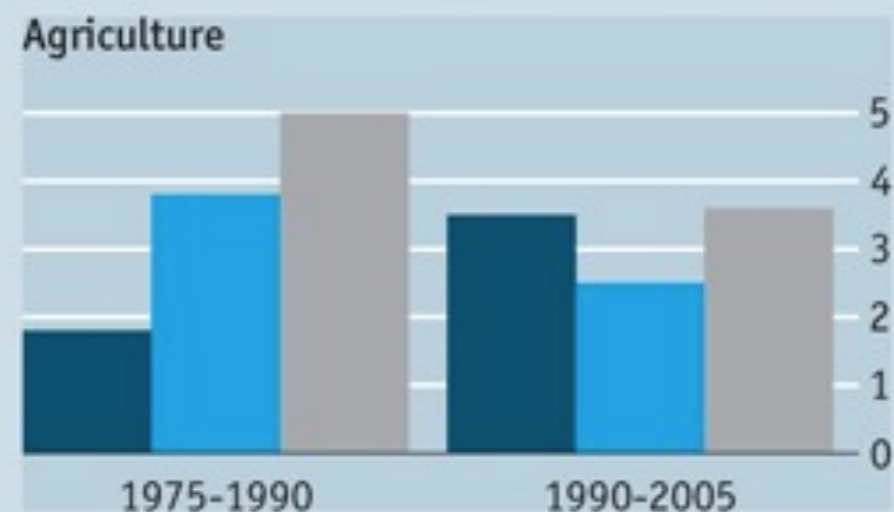


## Services lag behind

2

Annual average labour productivity growth, %

Latin America East Asia High-income countries



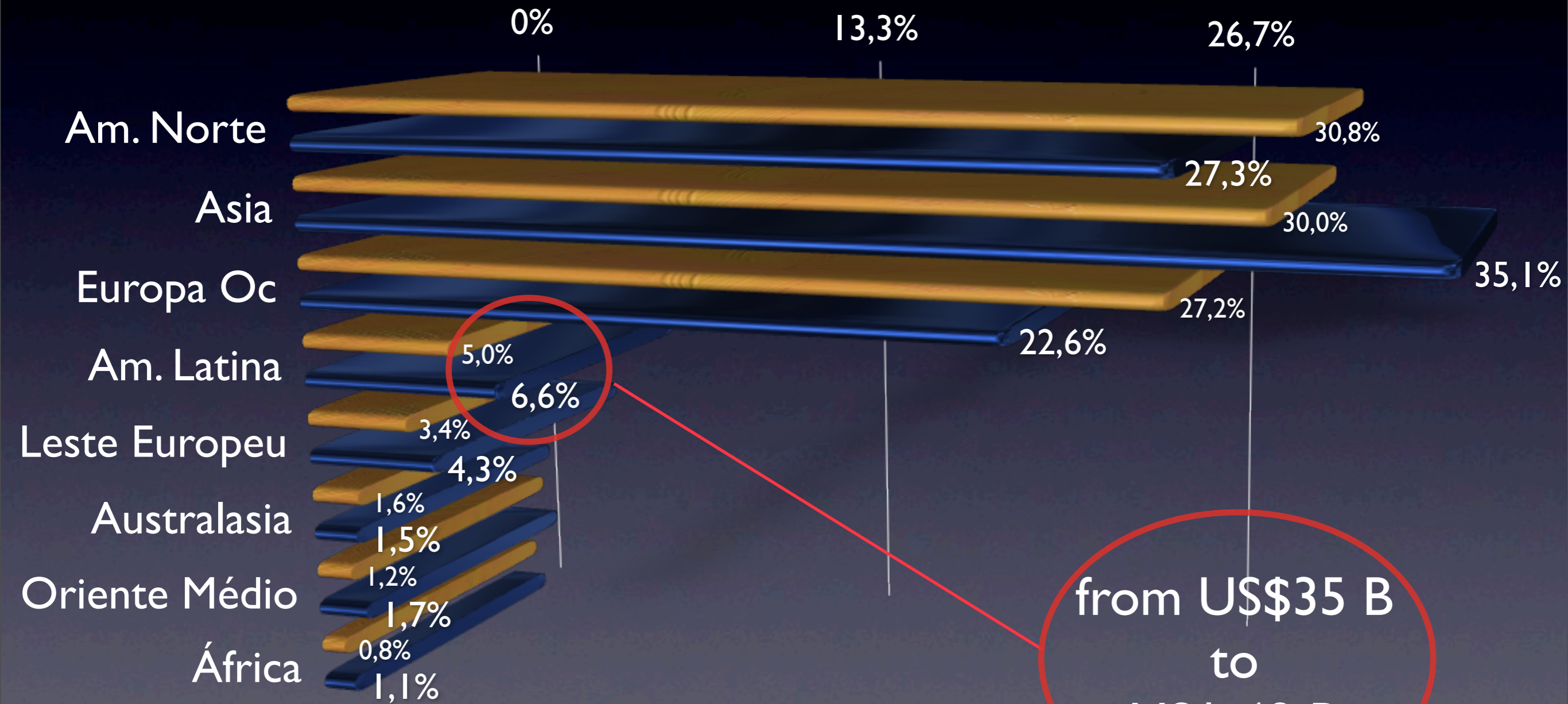
labor productivity gradually going up

Source: Inter-American Development Bank

# World Wide Market for Print

2009 - US\$ 700 B

2014 - US\$ 725 B

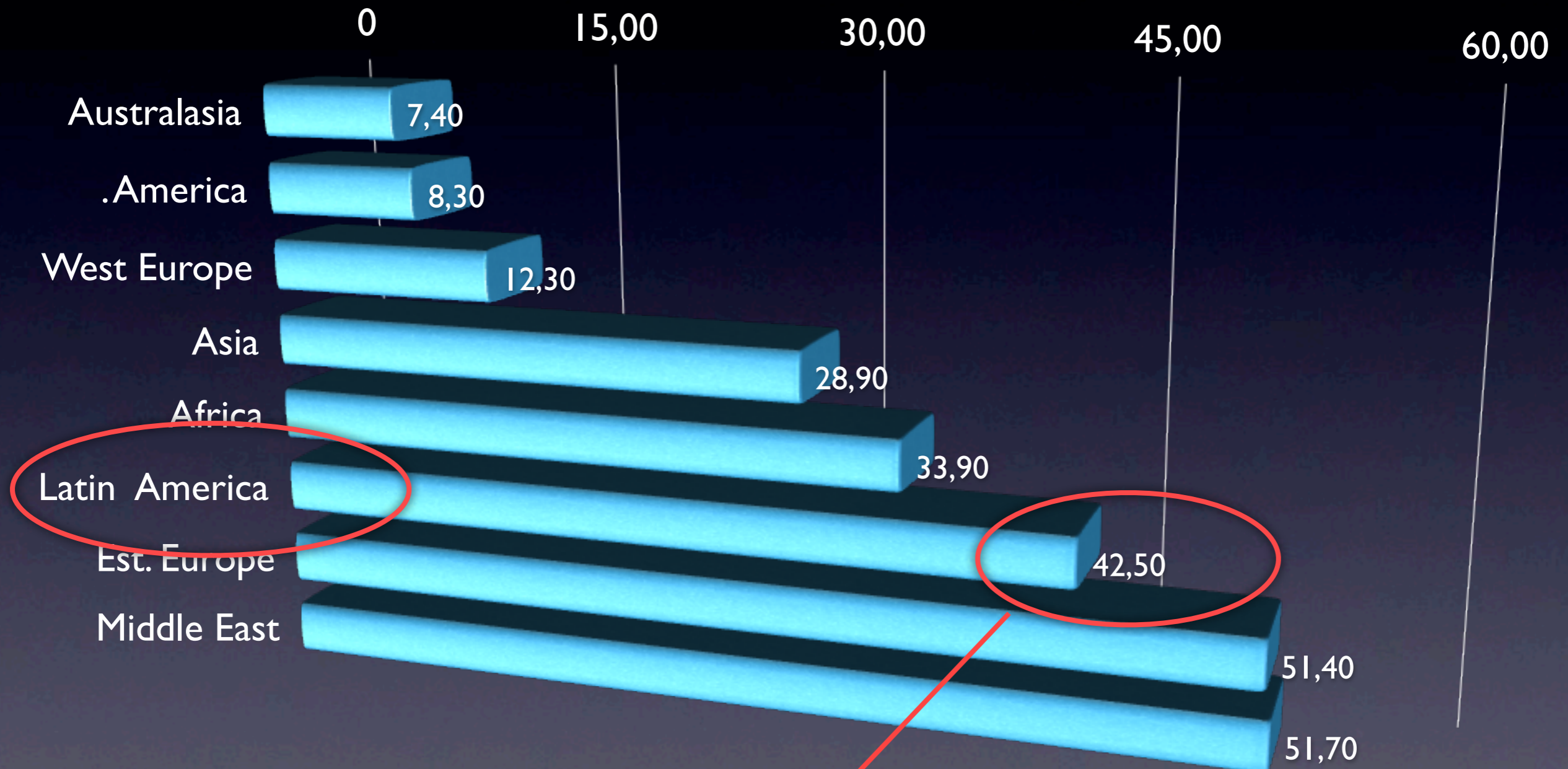


from US\$35 B  
to  
US\$ 48 B

emerging markets: higher growth

Source: Primir WWMP

# Growth forecast by region 2009 - 2014



LA compoud annual growth rate: 7.3%

Source: Primir WWMP

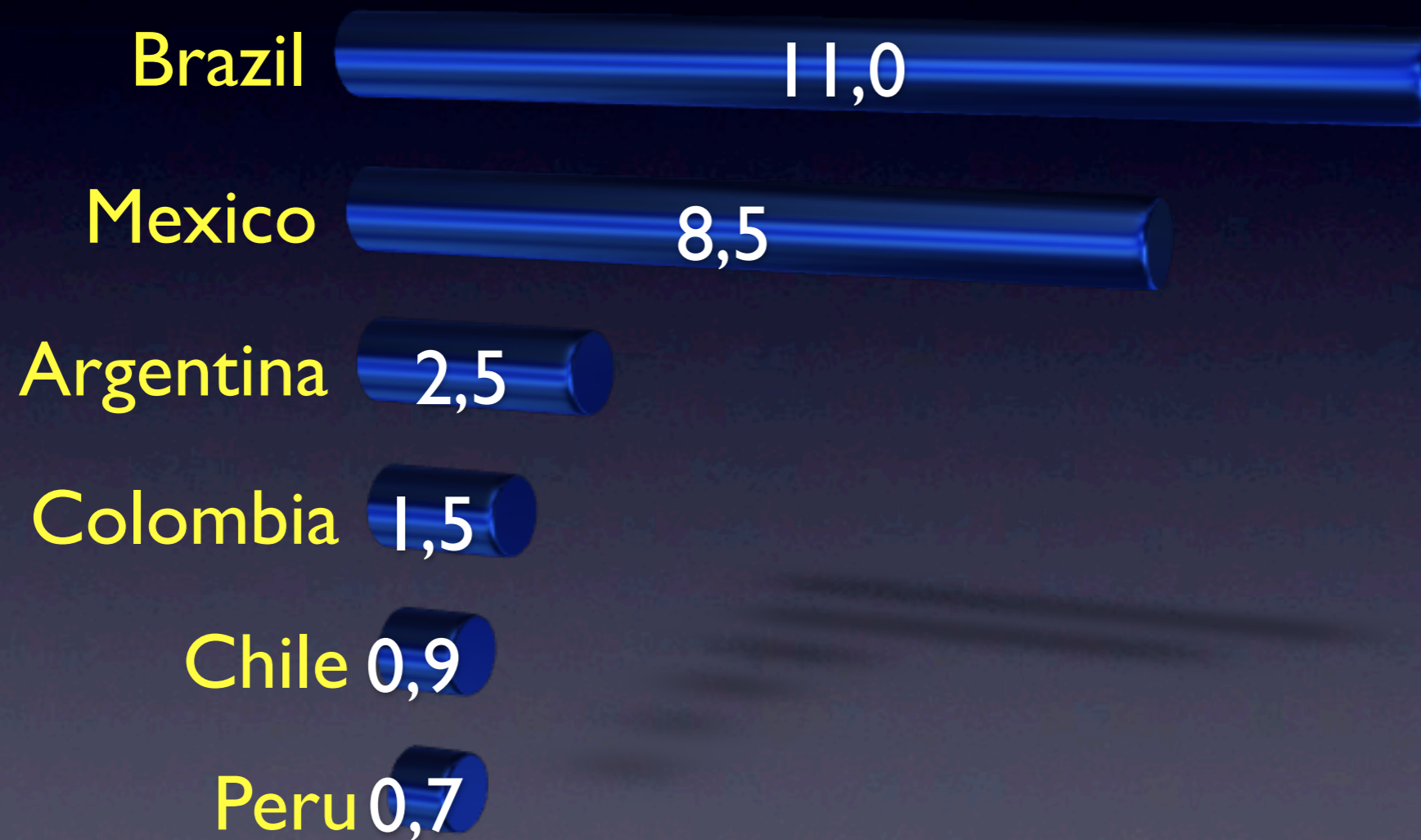
# Printing Industry Performance

| Country   | 2010/2009<br>1st. semester | 2009   |
|-----------|----------------------------|--------|
| Peru      | 9%                         | 2%     |
| Argentina | 8,5%                       | 1%     |
| Brasil    | 8%                         | (1.2%) |
| México    | 7%                         | (4%)   |
| Chile     | 5%                         | 0      |
| Colombia  | 3%                         | 0      |

Estimates



# Print markets



Estimates

in US billion dollars



# Brazil and Mexico markets



## Mario Cesar Martins de Camargo

- Abigraf's president
- Principal at Gráfica Bandeirantes

## Luis Reynoso Vilches

- Principal and Publisher at Bazar Gráfico magazine

