

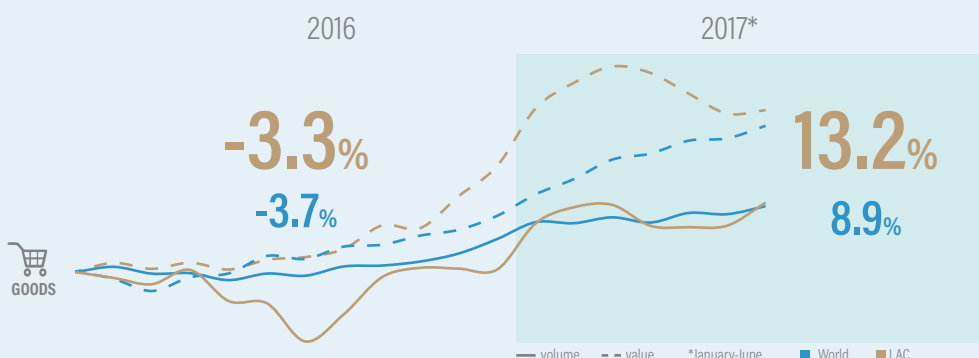
BEYOND THE
RECOVERY

COMPETING FOR MARKET SHARE IN THE DIGITAL ERA

In 2016 the value of Latin American and Caribbean exports contracted at a slower pace than that of world trade



The recovery was the result of a price increase coupled by a slight volume increase



However, the effect in different regions is heterogeneous...

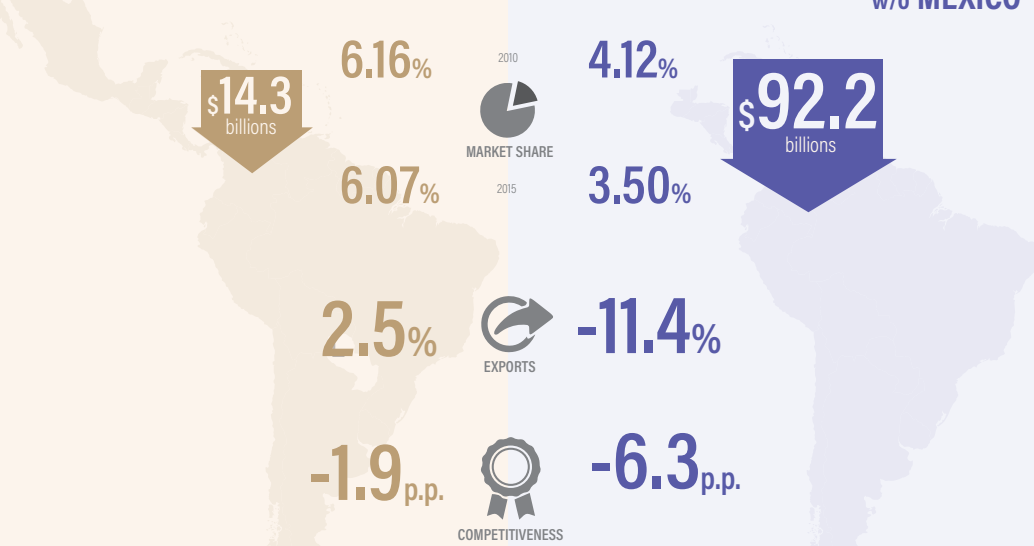


A medium-term analysis shows that **lack of competitiveness** and demand changes are having a negative effect on market share

The market share loss is higher when looking at the performance of **Latin America without Mexico**

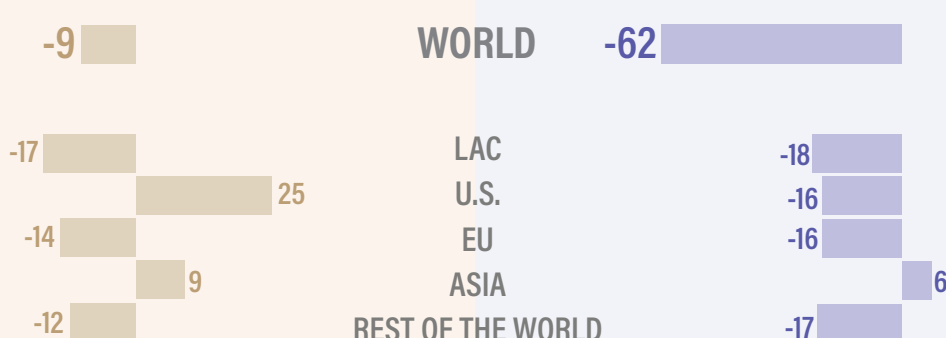
2010 - 2015

LATIN AMERICA AND THE CARIBBEAN

LATIN AMERICA AND THE CARIBBEAN
w/o MEXICO

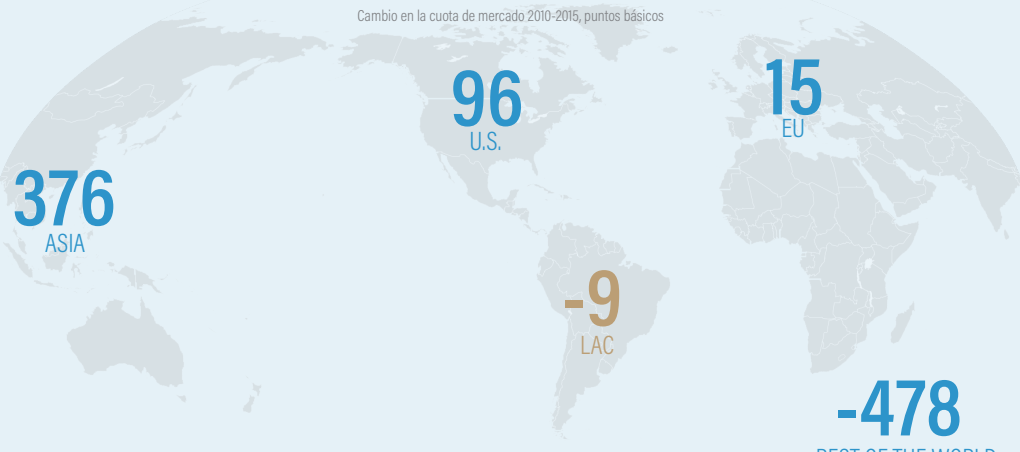
WHERE DO WE LOSE MARKET SHARE?

Change in world market share 2010-2015, basis points



WHAT WAS THE VARIATION OF MARKET SHARE IN OTHER REGIONS?

Cambio en la cuota de mercado 2010-2015, puntos básicos

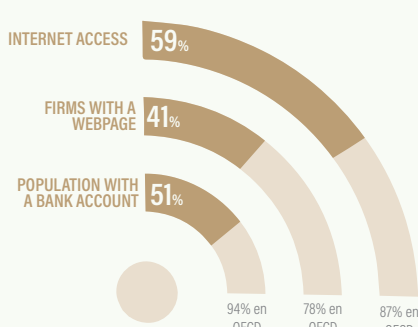


Given the current outlook, **e-commerce** rises as an opportunity to boost trade in Latin America and the Caribbean



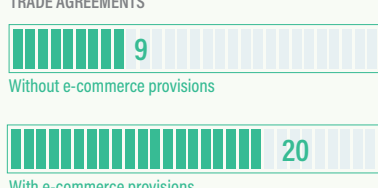
In order to benefit from this platform the region needs to **close the digital infrastructure gap** and needs to have a **regulatory framework** adapted to the new technologies

DIGITAL INFRASTRUCTURE



REGULATORY FRAMEWORK

TRADE AGREEMENTS



PROVISIONS PER AGREEMENT

