

LAC Marketplace Explorer Brazil | Annual Report 2022

Highlights

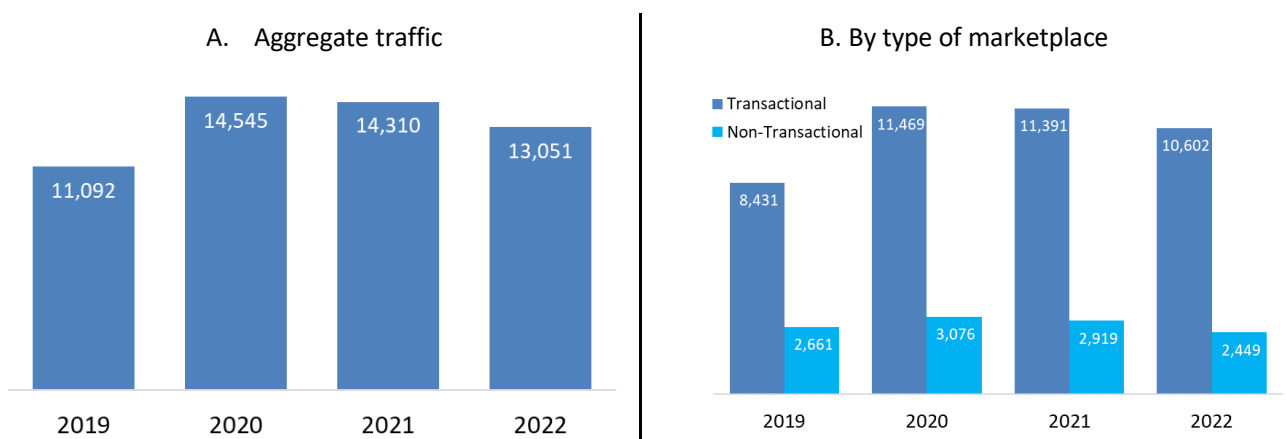
- Total marketplace traffic reached 13,051 million visits in 2022, down 8.8 per cent from 2021, contracting for the second time since 2019.
- Traffic in both transactional and non-transactional marketplaces dropped.
- Mercado Libre dominates the marketplace landscape, concentrating 22.2 per cent share of total marketplace traffic.

1. Marketplace activity

Marketplace traffic totaled 13,051 million visits in 2022, an 8.8 per cent decrease from the previous year (Figure 1.A). The decline was observed in both transactional and non-transactional sites, which decreased 6.9 per cent and 16.1 per cent y.o.y., respectively (Figure 1.B). Most marketplace activity in Brazil remains concentrated in domestic marketplaces, which account for around 40 per cent of total traffic.

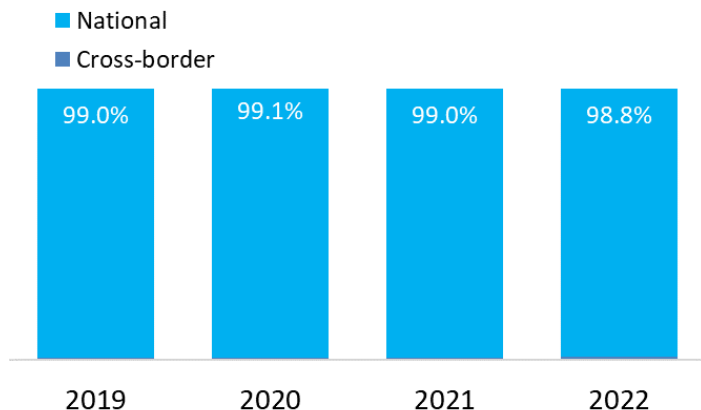
Brazil is the largest e-commerce market in terms of marketplace traffic in LAC, with a 55 per cent share, followed by Mexico and Argentina (Figure 3). In 2022, the percentage of cross-border visits to sites targeting to the country as a share of total visits was 1.2 per cent (Figure 2).

Figure 1. Evolution of marketplace traffic, Brazil, 2019-2022 (million visits)



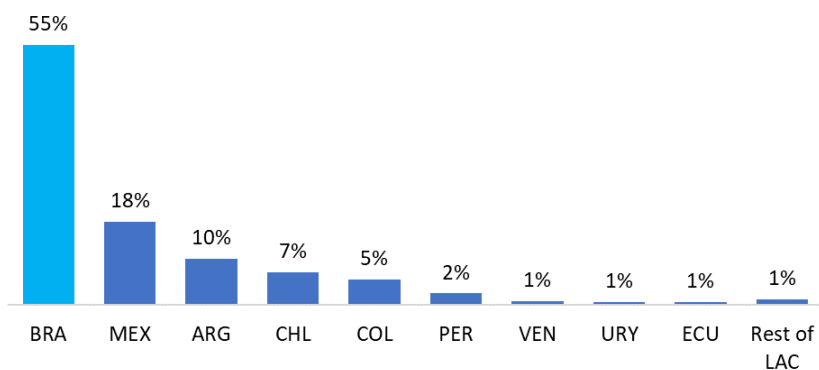
Source: LACME.

Figure 2. Distribution of marketplace traffic across marketplaces by origin of visitor traffic, Brazil, 2019-2022



Source: LACME.

Figure 3. Distribution of marketplace traffic across countries, LAC, 2022



Source: LACME.

2. Marketplace landscape

In 2022, there were 306 active B2C marketplaces for goods in Brazil. The top 10 most visited marketplaces concentrated 70.5 per cent of total traffic (Table 1). Mercado Libre was the most popular marketplace, with 22.2 per cent of total traffic, followed by Amazon, with 13.0 per cent. Traffic from Brazil to foreign global marketplaces stood at 968.8 million, 8 percent higher than in 2021. The most visited global site was Amazon, with 63.7 per cent of total traffic in global marketplaces (Figure 5.B).

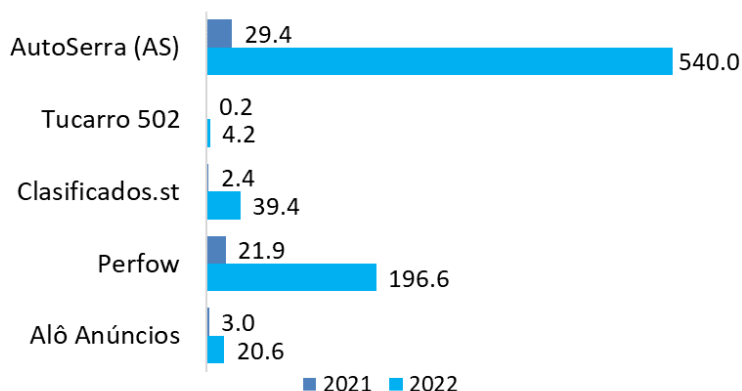
The fastest growing marketplaces in 2022 were AutoSerra (AS) and Tucarro 502, both classifieds sites specialized in automotive vehicles (such as cars, trucks, and motorcycles); Clasificados.st, a national marketplace for classifieds ads about various items; Perfow, a price comparisons site and Alô Anúncios, also a classifieds site (Figure 4).

Table 1. Leading marketplaces in Brazil, 2022

Marketplace	Traffic (mill. visits)	Traffic share (%)	Annual growth (%)
Mercado Libre	2893.0	22.2	-10.1
Amazon	1699.8	13.0	45.8
Americanas	1121.7	8.6	-25.4
OLX	1095.4	8.4	-25.6
Shopee	1037.5	7.9	76.6
Casas Bahia	595.6	4.6	-38.0
Droga Raia	200.0	1.5	7.8
Carsales.com	200.0	1.5	-6.4
Buscapé	178.6	1.4	4.9
KaBuM	173.5	1.3	4.0
Top-10	9195.1	70.5	-4.6

Source: LACME.

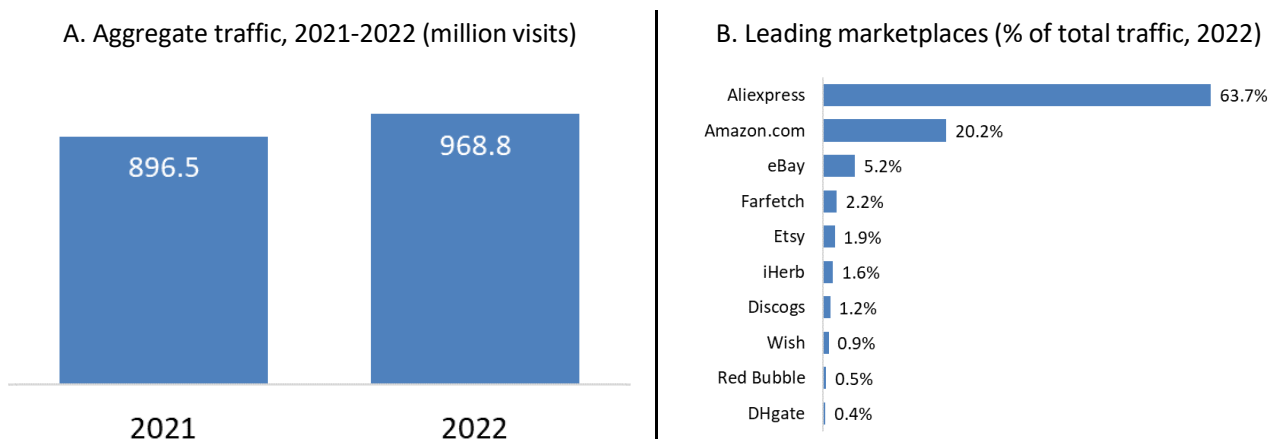
Figure 4. Traffic of fastest growing marketplaces in Brazil, 2021-2022 (thousand visits)



Note: Marketplaces are ordered in decreasing order of percentage annual growth rates.

Source: LACME.

Figure 5. Traffic from Brazil in foreign global marketplaces that ship to Brazil, 2021-2022



Note: Marketplaces include all their country domains (e.g., Amazon includes amazon.es and amazon.fr).

Source: LACME.

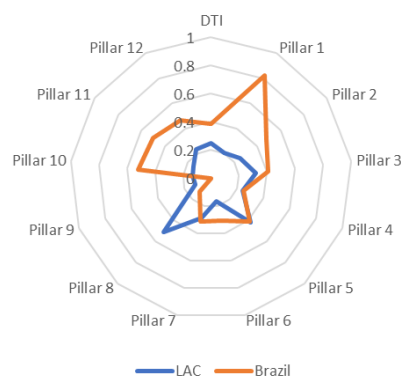
Table 2. Selected e-commerce environment indicators, Brazil, 2019-2022

Indicator	2019	2020	2021	2022
Active mobile-broadband subscriptions (per 100 inh.)	86.8	89.5	95.9	93.1
Population using the Internet (%)	73.9	81.3	80.7	80.5
Cross-border e-commerce (% of online sales)	8.0	7.0	6.0	6.0
Credit card ownership (% of adults)	-	-	40.4	-
Digital Trade Restrictiveness Index	0.4	-	-	-
Integrated Index of Postal Development	46.3	53.2	47.6	49.0

Source: OECD, ECLAC, World Bank, Ebanx, UPU, DTI Project.

3. Regional digital trade integration index

From the analysis of relevant policies for the integration of digital trade, the Regional Digital Trade Integration Index (RDTII) shows Brazil's performance compared to other LAC countries. The analysis integrates the scores of 12 pillars using a simple average method, where each pillar of the DTII is the weighted average of the indicator-level scores. Indicator scores range from "0" to "1" (where 0 indicates a better integration index) and are based on a review of existing policies and regulations, including those for ICT goods, intermediate goods, and inputs; digital delivery services; foreign investment in sectors relevant to digital trade; and use of personal data. The framework covers two components of digital trade policies, namely restrictions and enabling policies.

Figure 6. RDTI – pillar scores, Brazil and LAC**Table 3. RDTI – pillars scores**

	LAC	Brazil
DTI index	0.25	0.38
Pillar 1: Tariffs and trade defence	0.20	0.83
Pillar 2: Public procurement	0.25	0.48
Pillar 3: Foreign Direct Investment	0.32	0.41
Pillar 4: Intellectual Property Rights (IPRs)	0.24	0.25
Pillar 5: Telecom infrastructure & competition	0.42	0.41
Pillar 6: Cross-border data policies	0.17	0.31
Pillar 7: Domestic Data policies	0.29	0.32
Pillar 8: Intermediary liability	0.51	0.13
Pillar 9: Content access	0.12	0.00
Pillar 10: Quantitative trade restrictions	0.13	0.52
Pillar 11: Technical standards	0.15	0.50
Pillar 12: Online sales and transactions	0.23	0.46

Source: Digital Trade Integration Project.

Brazil's main strengths include
Among the key recommendations,

Additional resources

Brazil

- eTrade for all Country Profile
<https://etradeforall.org/wp-content/uploads/countryprofiles/2021/BRAZIL.pdf>
- U.S. International Trade Administration Country Commercial Guide
<https://www.trade.gov/knowledge-product/brazil-market-overview?section-nav=1851>
- Digital Trade Integration Project Country Profile
<https://dti.eui.eu/database/?country=BR&country2=&chapter=&enablingOrRestrictions=ER&v=2>

Latin America and the Caribbean

- Digital Agenda for Latin America and the Caribbean (eLAC 2024)
<https://www.cepal.org/en/projects/digital-agenda-latin-america-and-caribbean-elac2024>
- eTrade for all news and resources
<https://etradeforall.org/es/noticias/>
- International Trade Centre Country Profiles
<https://marketanalysis.intracen.org/en/country-profile>

About the LAC Marketplace Explorer

The Latin America and the Caribbean Marketplace Explorer maps and monitors activity on retail e-commerce marketplaces across the region. It covers visitor traffic and other main characteristics of almost 900 marketplaces and more than 2,900 marketplace websites. It was developed by the ecomConnect team at the International Trade Centre (ITC), the United Nations Economic Commission for Latin America and the Caribbean (UN-ECLAC), and the Centre for Market Insights of the Amsterdam University of Applied Sciences, with the support of the Forum for East Asia-Latin America Cooperation (FEALAC). Learn more and explore the data at <https://www.cepal.org/en/notes/latin-america-and-caribbean-marketplace-explorer-lacme>.