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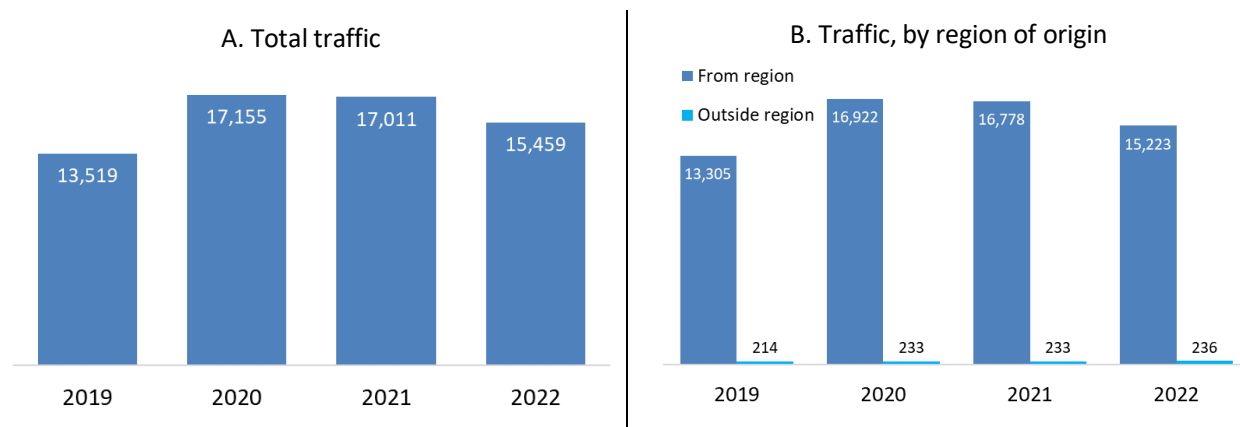
Mercosur | Annual Report 2022

Highlights

- Total marketplace traffic reached 15,459 million visits, a 9 per cent decline compared to 2021.

- More than 95 per cent of total traffic in Mercosur is originated within the block.

- Brazil is the main market within the block, concentrating more than 80 per cent of total traffic. Mercado Libre Brazil was the most popular marketplace in 2022, with 18.7 per cent of total traffic, but Amazon Brazil is gaining share, growing 45.8 per cent y.o.y. in 2022.
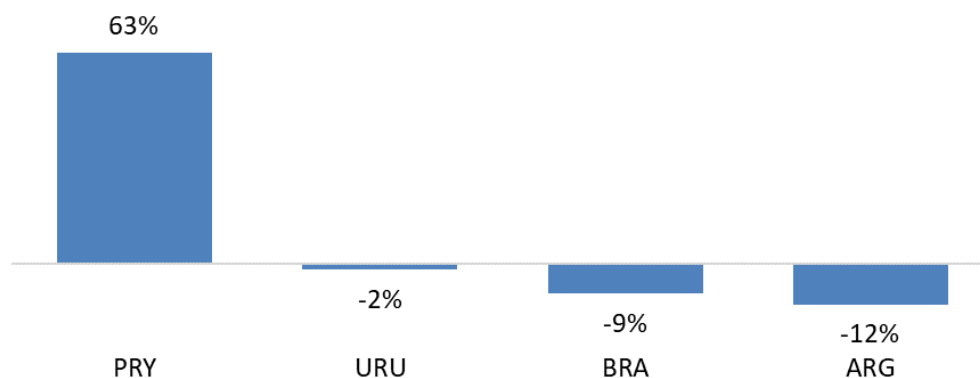
1. Marketplace activity

After growing 27 per cent during the COVID-19 pandemic, marketplace traffic in Mercosur fell 1 and 9 per cent in the next two years, to reach 15,459 million visits in 2022 (Figure 1.A). Practically all traffic is originated within the block, with extra-Mercosur traffic accounting for 1.5 per cent in 2022 (235.6 million visits). Paraguay was the only country with positive growth in 2022 (+63 per cent), while Argentina showed the steepest decline (-12 per cent). (Figure 2).

Most marketplace activity in the Mercosur is concentrated in Brazilian marketplaces, which accounted for 84 per cent of total traffic in 2022 (Figure 3). Argentina was the second largest market, with a 14 per cent share in 2022, while Uruguay and Paraguay are still incipient markets with very low traffic shares.

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

A. Total traffic

Year	Visits
2019	13,519
2020	17,155
2021	17,011
2022	15,459

B. Traffic, by region of origin

- From region
- Outside region

Year	From region	Outside region
2019	13,305	214
2020	16,922	233
2021	16,778	233
2022	15,223	236

Source: LACME.

Figure 2. Marketplace traffic annual growth across countries in Mercosur, 2021-2022

Source: LACME.

Figure 3. Distribution of marketplace traffic across countries in Mercosur, 2022
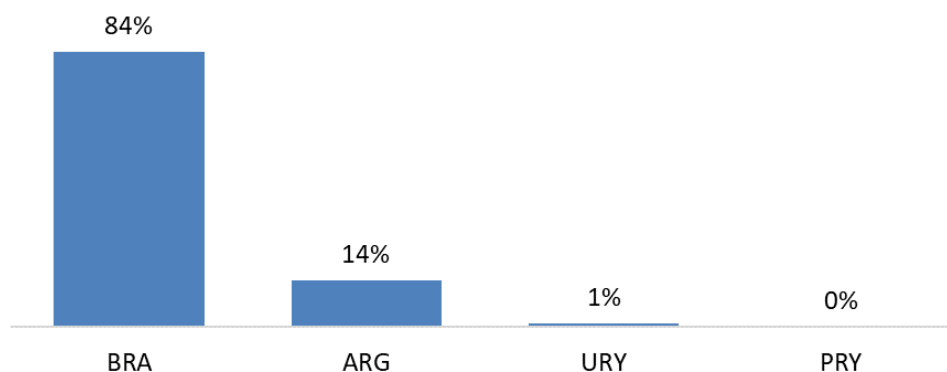
Source: LACME.

2. Marketplace landscape

In 2022, there were 530 B2C active marketplaces for goods in Mercosur. The top 5 most visited marketplaces concentrated 53.3 per cent of total traffic (Table 1). Mercado Libre Brazil was the most popular marketplace, with 18.7 per cent of total traffic, followed by Mercado Libre Argentina (11.2 per cent). Within the top 5 sites, Amazon Mexico gained market share in 2022, as traffic increased 45.8 percent y.o.y. Among global sites that ship to Mercosur, the most visited one was Amazon, with 54.4 per cent of total traffic directed to those sites.

The fastest growing marketplaces in 2022 were Anuto.net, a real-time classifieds web application; Tu Aviso Clasificado, a classifieds websites; Subastas Electronicas, an auction site specialized in judiciary auctions; Castells, an auction site specialized in all kinds of goods; and Shopee, an online shopping mall which provides a wide range of products for consumers, including electronics, fashion, beauty products, home goods, and more (Figure 4).

Table 1. Leading marketplaces targeting Mercosur, 2022

Marketplace	Traffic (mill. visits)	Traffic share (%)	Annual growth (%)
Mercado Libre (Brazil)	2,893.0	18.7	-10.1
Mercado Libre (Argentina)	1,732.3	11.2	-14.1
Amazon (Brazil)	1,699.8	11.0	45.8
Americanas (Brazil)	1,121.7	7.3	-25.4
OLX (Brazil)	1,095.4	7.1	-25.6
Top-5	**8,542.2**	**55.3**	**-8.9**

Source: LACME.

### Table 2. Leading global marketplaces that ship to Mercosur, 2022

Marketplace	Traffic (mill. visits)	Traffic share (%)	Annual growth (%)
Aliexpress	650.6	54.4	24.7
Amazon.com	328.3	27.5	-2.1
eBay	65.9	5.5	-9.6
Etsy	30.6	2.6	7.1
Farfetch	22.9	1.9	14.3
Top-5	**1,098.3**	**91.9**	**12.2**

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

Figure 4. Traffic of fastest growing marketplaces in Sub-region, 2021-2022 (thousand visits)
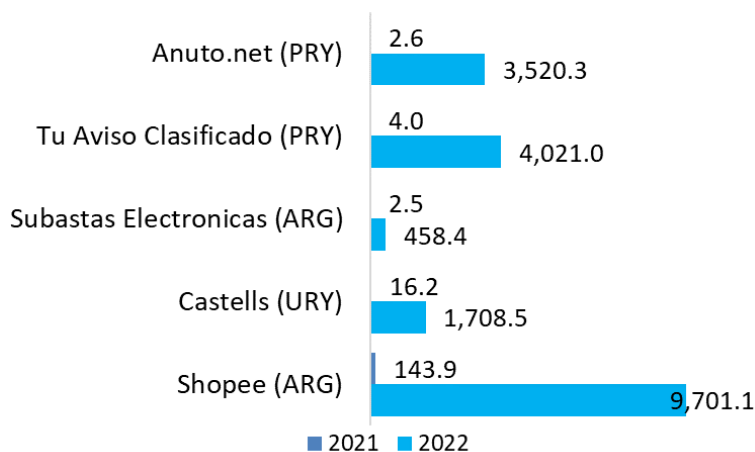
Note: Marketplaces are ordered in decreasing order of percentage annual growth rates.
Source: LACME.

Table 3. Selected e-commerce environment indicators, Mercosur, 2019-2022

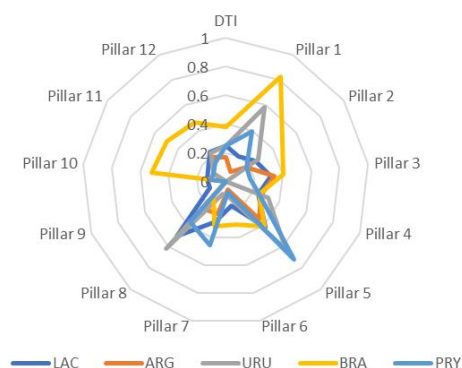| Indicator	2019	2020	2021	2022
Active mobile-broadband subscriptions (per 100 inh.)	81.8	83.0	86.9	93.3
Population using the Internet (%)	76.4	81.8	83.7	83.8
Cross-border e-commerce (% of online sales)	8.0	7.0	24.3	30.8
Credit card ownership (% of adults)			27.3	
Digital Trade Restrictiveness Index	0.3			
Integrated Index of Postal Development	32.9	34.3	26.9	34.6

Note: The indexes are calculated based on the average of the available indexes for each country in the sub-region.

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 the Mercosur countries' performance, compared to the LAC average. This 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.

TBC by CEPAL:
- Main strengths of member countries.

- Key recommendations.

Figure 6. RDTI – pillar scores, Mercosur (by country)

Table 3. RDTI – pillars scores

	Mercosur	LAC
DTI index	0.26	0.25
Pillar 1: Tariffs and trade defence	0.47	0.20
Pillar 2: Public procurement	0.28	0.25
Pillar 3: Foreign Direct Investment	0.23	0.32
Pillar 4: Intellectual Property Rights (IPRs)	0.27	0.24
Pillar 5: Telecom infrastructure & competition	0.53	0.42
Pillar 6: Cross-border data policies	0.14	0.17
Pillar 7: Domestic Data policies	0.27	0.29
Pillar 8: Intermediary liability	0.34	0.51
Pillar 9: Content access	0.00	0.12
Pillar 10: Quantitative trade restrictions	0.16	0.13
Pillar 11: Technical standards	0.20	0.15
Pillar 12: Online sales and transactions	0.26	0.23

Note: The pillars are calculated based on the average of the available pillars for each country in the sub-region.
Source: Digital Trade Integration Project. The Mercosur's pillars are calculated from the mean of the subregion countries pillars.

Additional resources

Mercosur

- Mercosur digital agenda
  https://www.mercosur.int/temas/agenda-digital/

- Mercosur Agreement on Electronic Commerce
  https://www.mre.gov.py/tratados/public_web/DetallesTratado.aspx?id=2r0+6uBvKfThjkfA76FNlg==

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.