

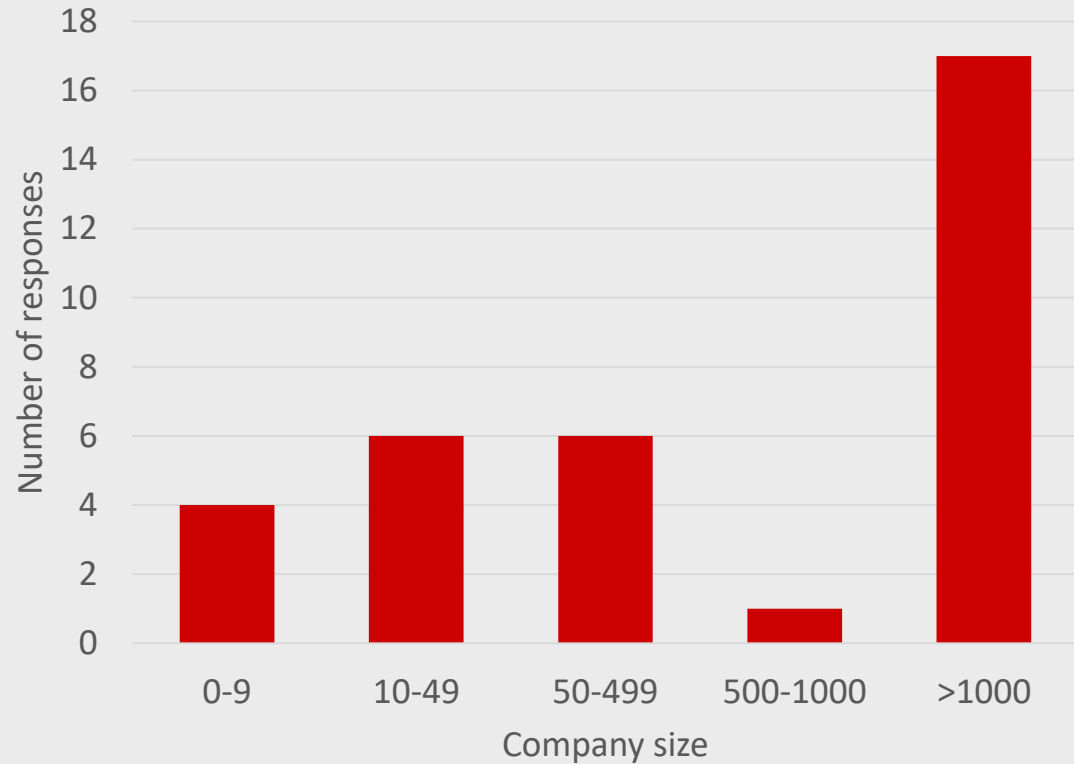
Latin America business environment 2019 German investors survey

published by

Lateinamerika Verein &
Americas Market Intelligence



About the respondents



Industries represented in the study



Agriculture



Chemical /
Pharmaceutical



Construction



Education



Health
Care



Energy



Logistics



Manufacturing –
Machinery



Mining



Trading



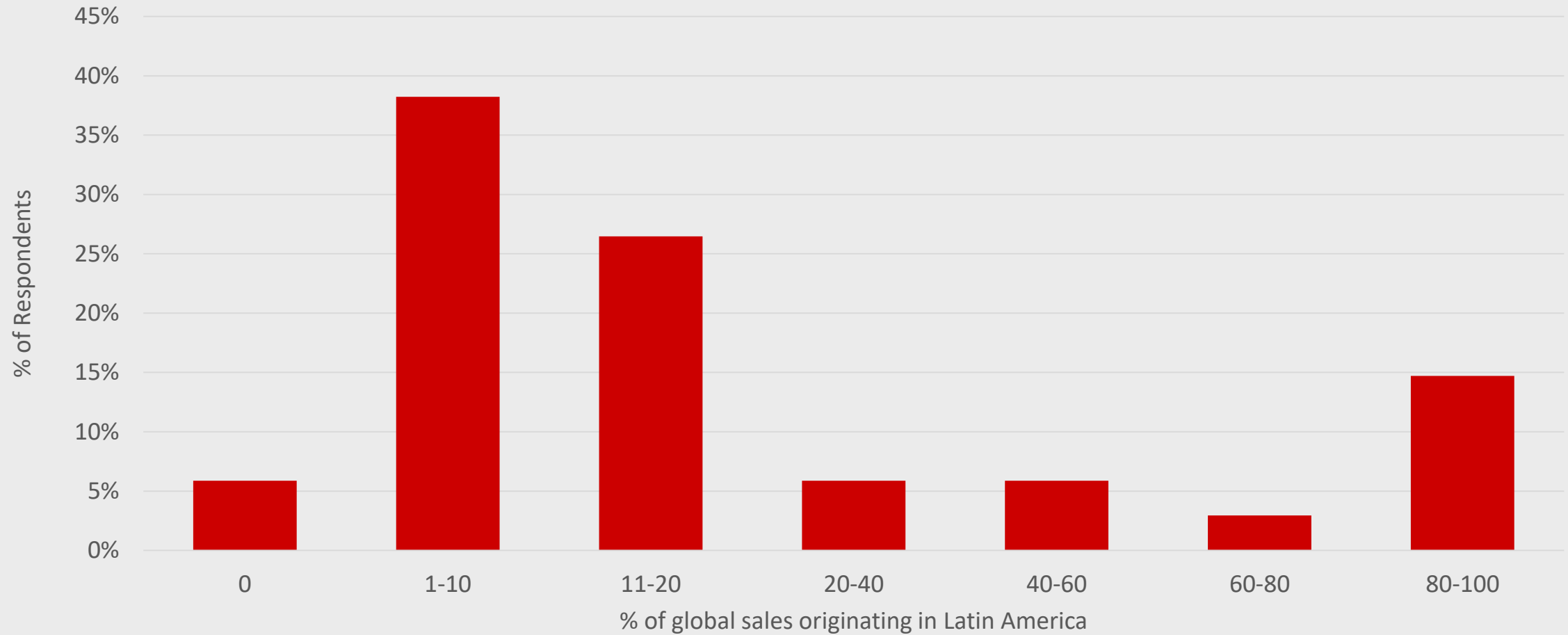
Professional
Services



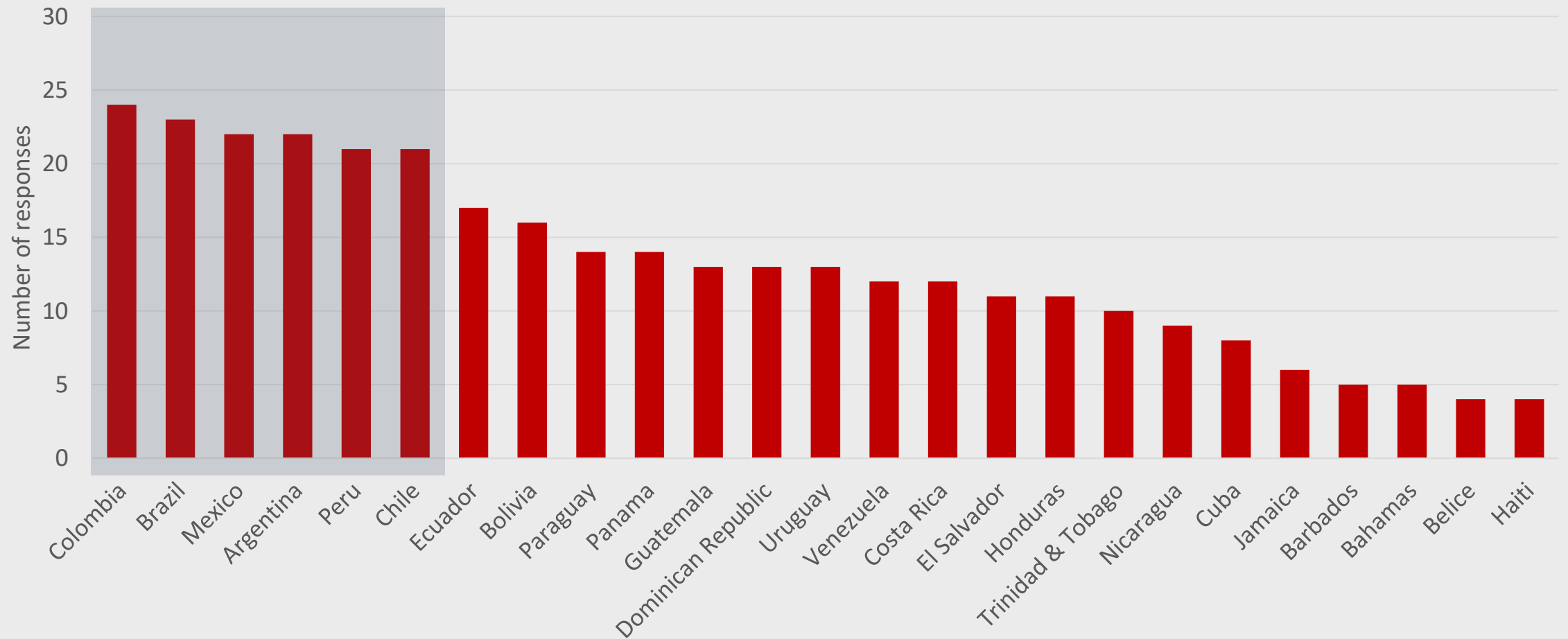
Transport



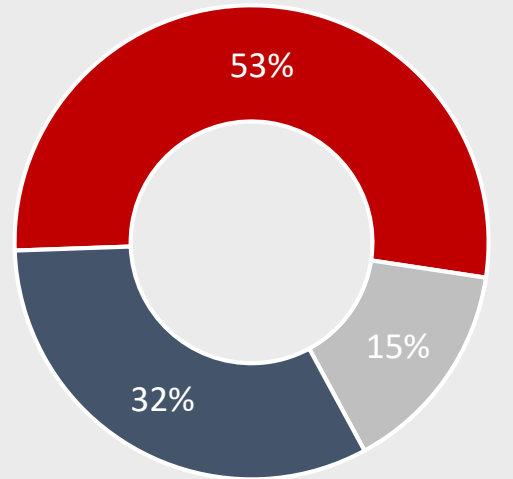
Percentage of global sales originating in LatAm



Countries where respondents currently operate in Latin America



A positive, but cautious, outlook for the region



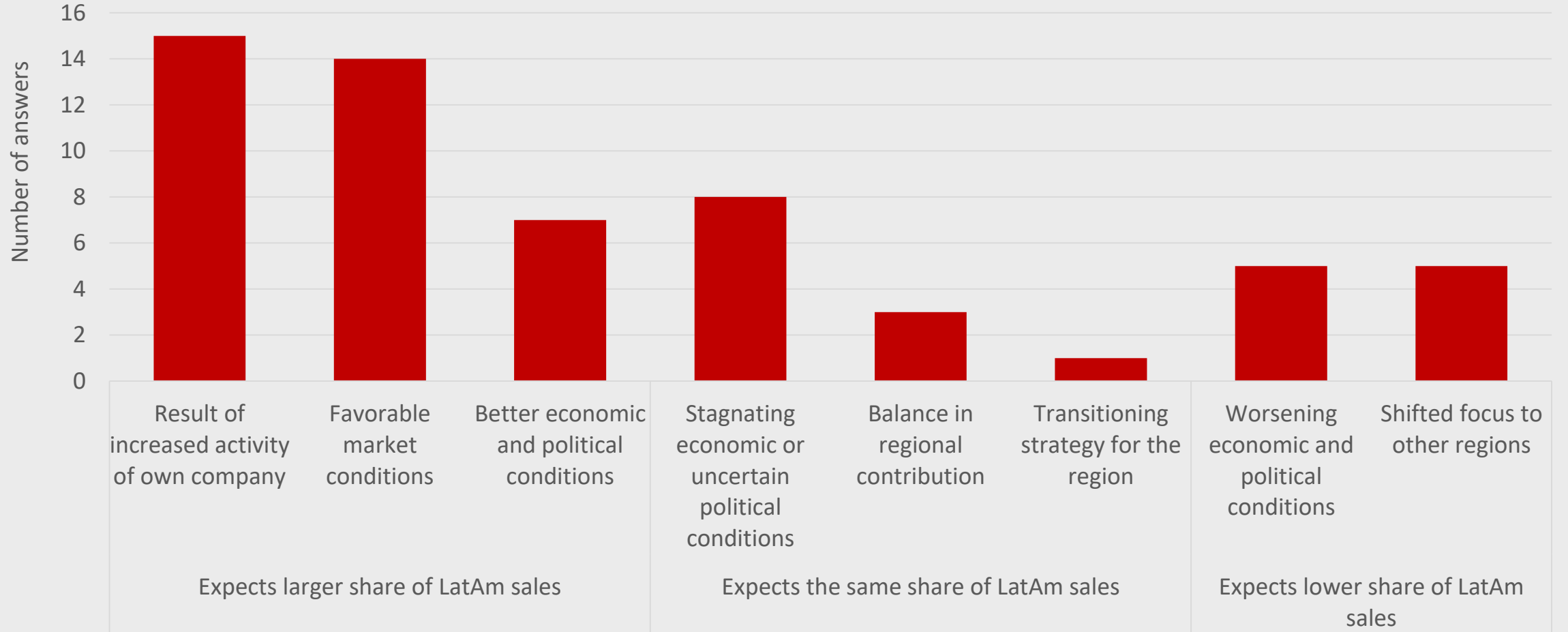
- a higher percentage than today
- a lower percentage than today
- the same percentage as today



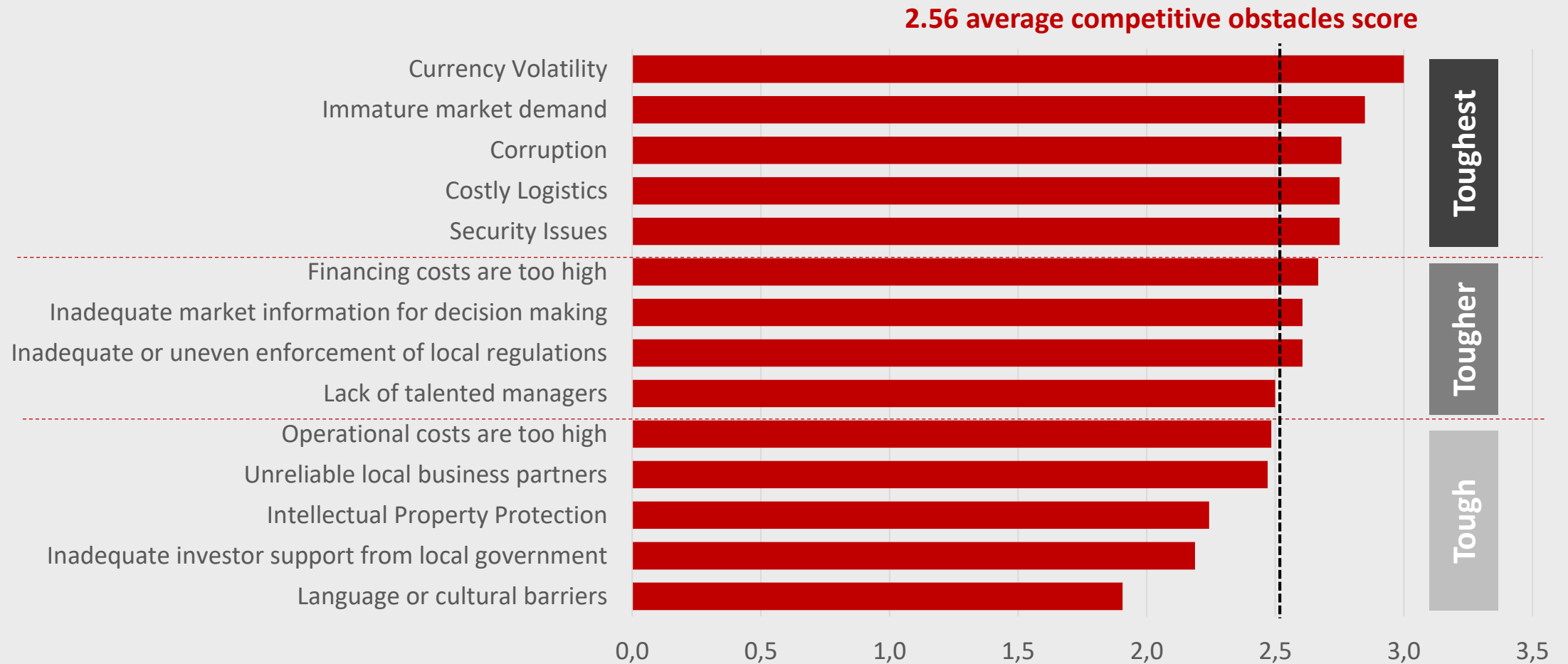
In 2024, what do you believe Latin America will represent of your company's global sales?



What explains the outlook?



Competitive obstacles in Latin America; Average score in a 1-5 scale (5 highest)



Overcoming Obstacles

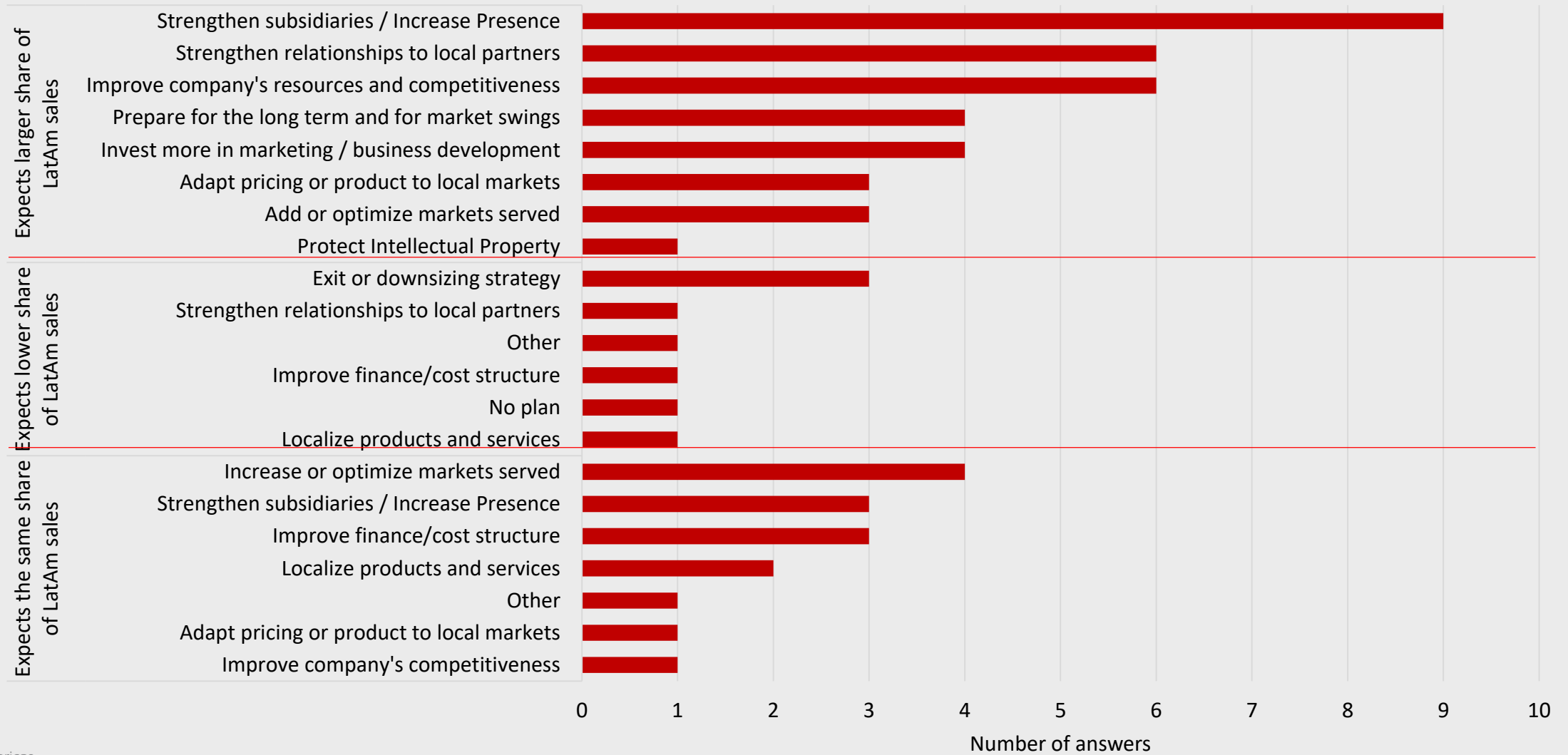


Main competitive obstacle by industry

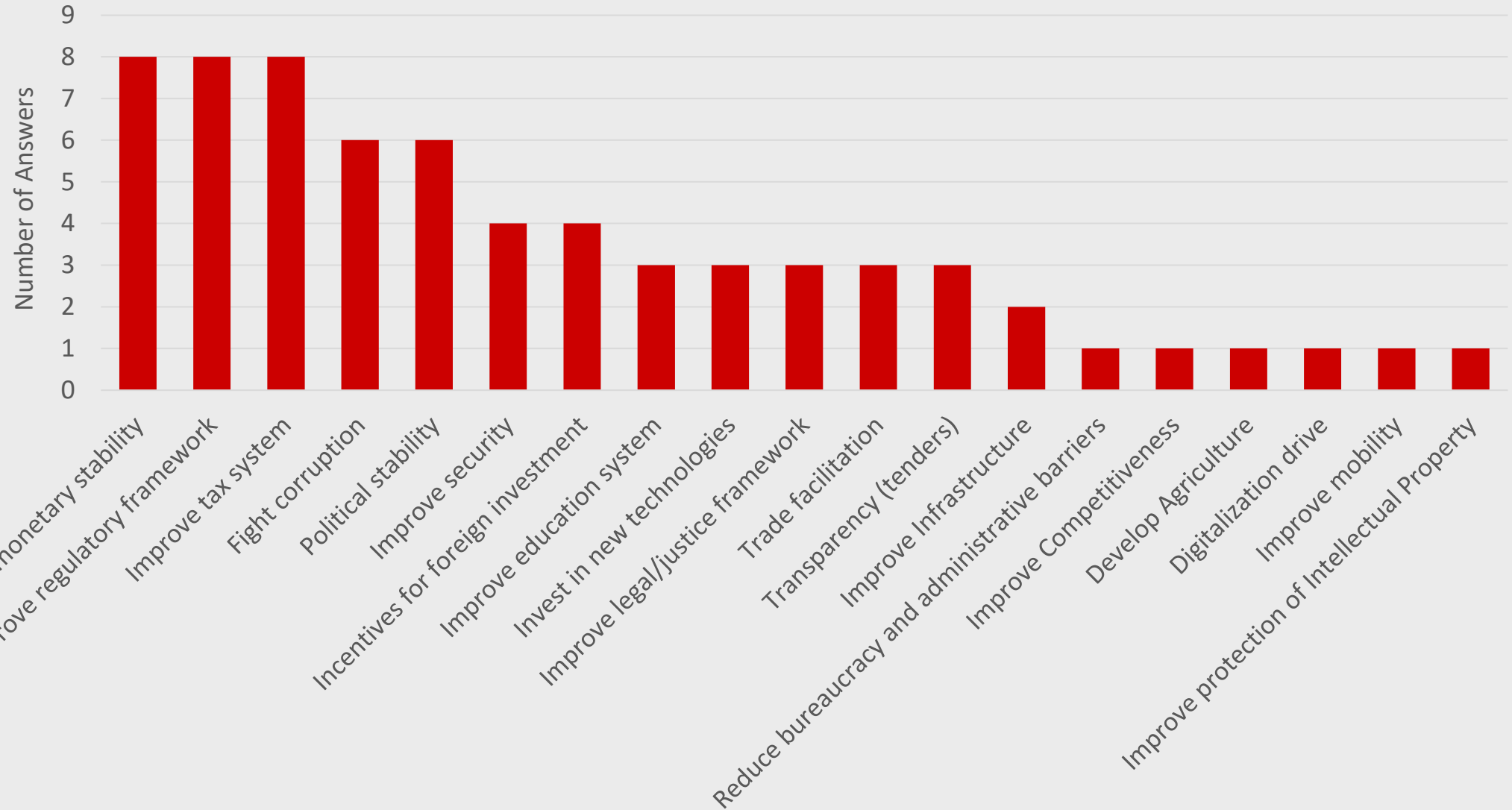
	Logistics	Security		Chemical / Pharma	High operational costs
	Agriculture	Unreliable partners		Healthcare	Inadequate regulation
	Manufacturing	Costly logistics		Energy	Corruption
	Professional services	Inmature market		Construction	Security
	Transport	Costly logistics		Mining	Lack of talent



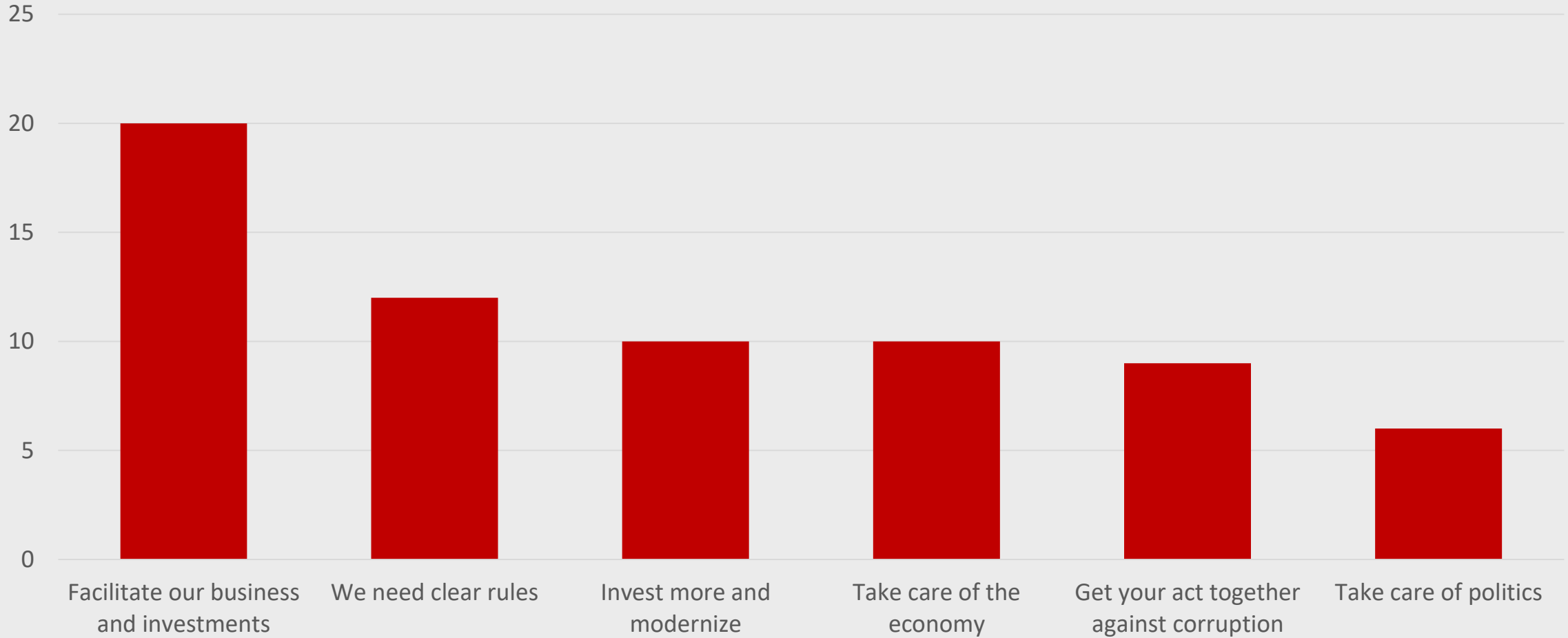
What do companies plan to do?



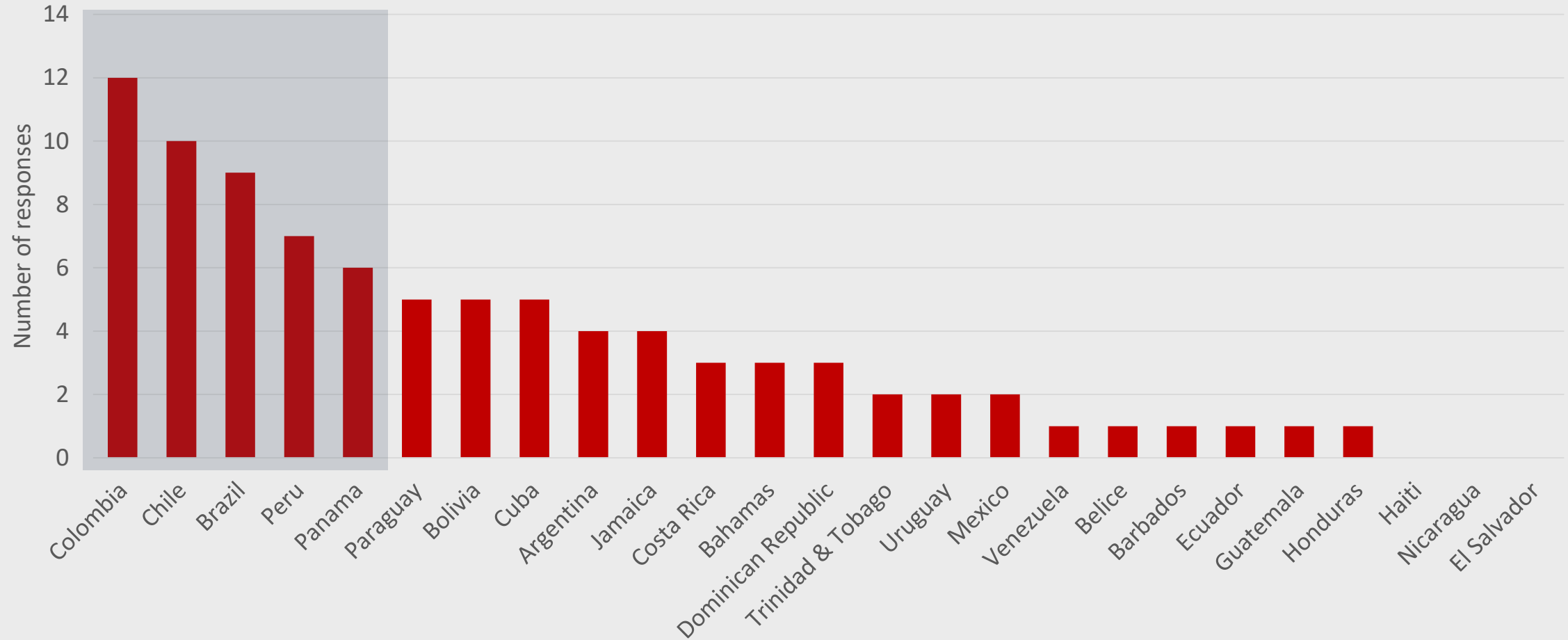
Most wished-for LatAm policy changes



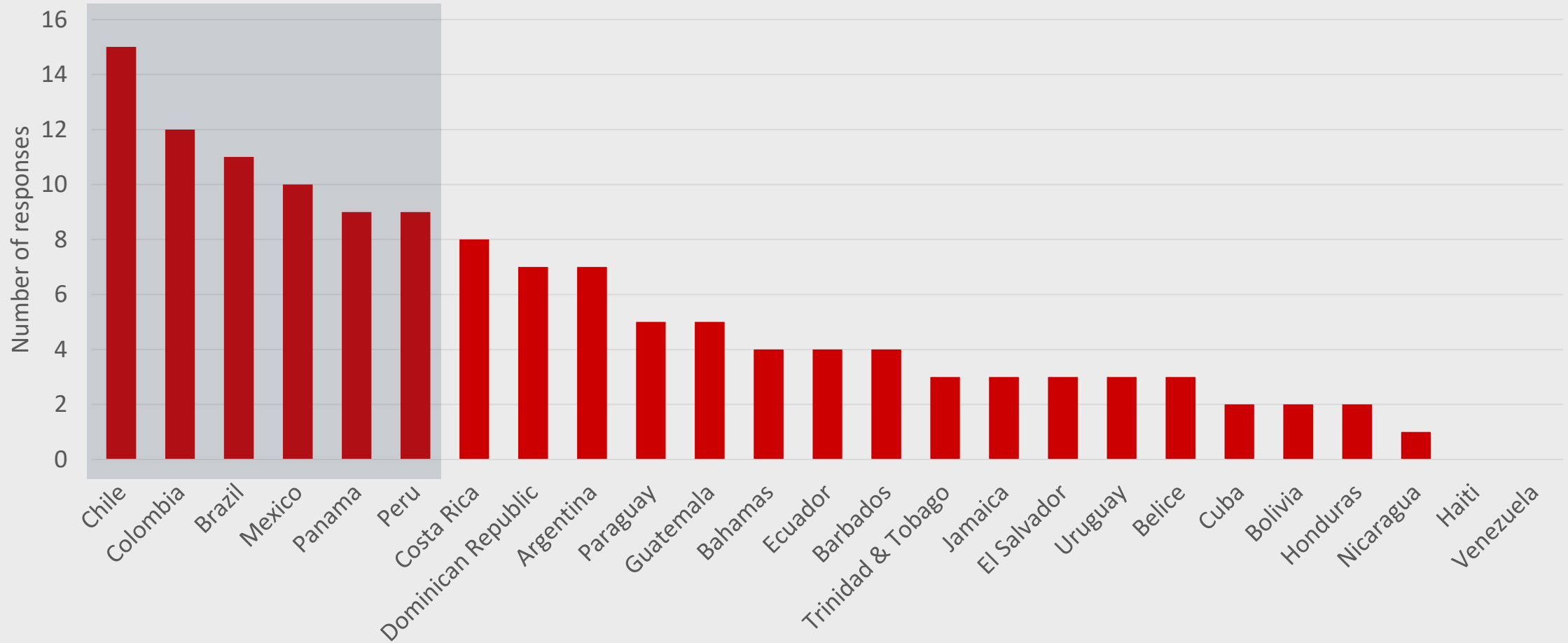
...which clearly spoken means



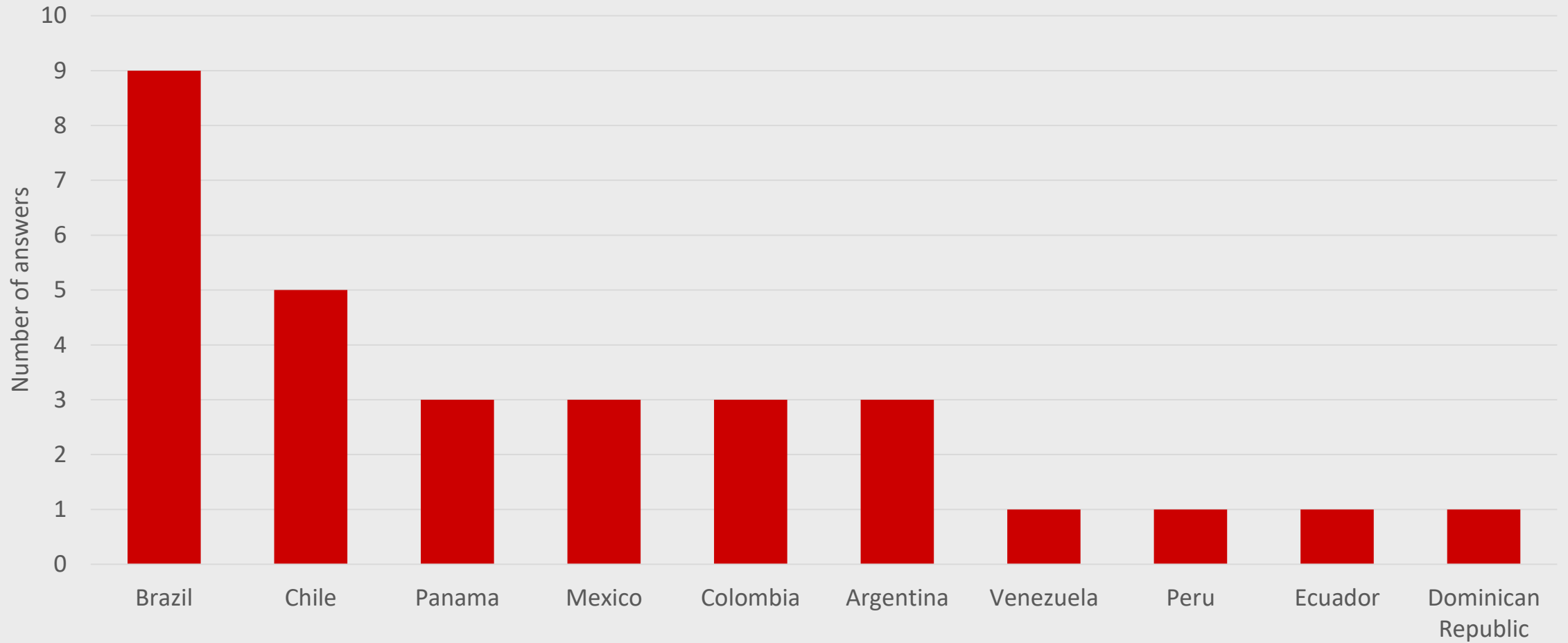
Where are business climates improving?



The markets respondents would recommend for market entry or expansion



Highest expectations of growth over the next two years



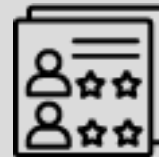
AMI is the leading independent Market Intelligence provider in Latin America



AMI is Latin America's leading Market Intelligence and Advisory group.



AMI's founding partners are pioneers in the field of Market Intelligence in Latin America, with over a quarter century of experience in the region.



AMI has experience in over 30 Latin American and Caribbean markets.

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AMI is a member of
SCIP
Strategic and Competitive
Intelligence Professionals.



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1 AMI is Latin America's leading independent market intelligence consultancy

Our founding partners helped pioneer the field of market intelligence in Latin America **2**

3 Our consultants have advised a third of the region's 100 largest strategic investors over a span of two decades

AMI consultants have conducted over 3,000 client engagements in Latin America since 1993 **4**

5 Our holistic approach to market intelligence is unique. We combine market research, competitive intelligence, political analysis and economic forecasting in our studies.



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