

Brazil E-commerce - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Brazil E-commerce Market size is estimated at USD 52.87 billion in 2024, and is expected to reach USD 125.68 billion by 2029, growing at a CAGR of 18.91% during the forecast period (2024-2029).

Key Highlights

- The e-commerce market in Brazil has been experiencing significant growth over the past few years. It has become one of Latin America's most likely e-commerce markets. Brazil has a young and tech-savvy population with a growing middle class with disposable income for online purchases.
- Younger generations, including millennials and Gen Z, are increasingly comfortable with online shopping and are driving e-commerce growth in the country. According to International Monetary Fund (IMF), in 2022, the total population of Brazil was estimated at approximately 213.91 million inhabitants and is expected to reach 227.55 million.
- The growing adoption of contactless payment is expected to positively impact Brazil's e-commerce market. Contactless payments, which include mobile wallets and contactless cards, offer convenience, speed, and enhanced security for online transactions.
- The Internet and smartphone usage penetration in Brazil has significantly influenced the growth of the e-commerce market. Increased Internet accessibility, smartphone adoption, and the availability of mobile shopping apps have made it easier for consumers to engage in online shopping. Additionally, the use of social media, diverse online payment methods, and favorable socio-economic factors have contributed to the expansion of the e-commerce landscape in Brazil.
- The high Internet access cost in Brazil can restrain the e-commerce market. Limited Internet access, higher online shopping costs, connectivity issues, and limited innovation can hinder the growth and adoption of e-commerce.
- The COVID-19 pandemic significantly impacted Brazil's e-commerce market, accelerating its growth and transforming consumer behavior. With lockdown measures and social distancing restrictions in place, consumers turned to online shopping as a safer

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alternative to in-person retail. The pandemic led to a surge in online shopping across various product categories, including groceries, household essentials, electronics, and fashion. This increased demand is driving the growth of the e-commerce market in Brazil.

Brazil Ecommerce Market Trends

Penetration of Internet and Smartphone Usage is Expected to Drive Brazil E-commerce Market

- The penetration of Internet and smartphone usage is expected to be a key driver for the growth of the e-commerce market in Brazil. Brazil has been witnessing a steady increase in Internet penetration over the years. As more people gain access to the Internet, the potential customer base for e-commerce expands. Internet services' greater availability and affordability enable more individuals to engage in online activities, including shopping.
- Brazil has a large population of smartphone users, and the adoption of smartphones continues to grow. Smartphones serve as a primary device for Internet access and online transactions. The increasing affordability of smartphones and attractive data plans allow more consumers to connect to online platforms and engage in e-commerce activities.
- The combination of Internet penetration and smartphone usage has fueled the growth of mobile commerce (m-commerce) in Brazil. Consumers are increasingly comfortable using smartphones to browse online stores, make purchases, and complete transactions. The convenience and accessibility offered by m-commerce contribute to the expansion of the overall e-commerce market.
- Fixed broadband connections generally offer higher internet speeds and greater reliability than other Internet connections. Faster Internet speeds allow for smoother online browsing, quicker page load times, and seamless online transactions, enhancing the overall e-commerce experience. Reliable connections reduce the chances of disruptions during online shopping, boosting consumer confidence in engaging with e-commerce platforms.
- According to Agencia Nacional de Telecomunicacoes (Brazil), Fixed broadband Internet subscriptions in Brazil are increasing in quantity and velocity. Regarding mobile phone subscriptions in Brazil, the fourth generation of wireless mobile telecommunications (4G) has been expanding. In 2022, Brazil had approximately 38.3 million fixed subscriptions with a transmission speed above 34 megabits per second (Mbps).

B2C E-commerce Segment is Expected to Hold Significant Market Share

- The business-to-consumer (B2C) e-commerce segment in Brazil's e-commerce market has experienced significant growth in recent years. B2C e-commerce refers to the online sales of products or services directly from businesses to individual consumers.
- The B2C e-commerce segment in Brazil has seen robust growth, driven by increasing Internet penetration, smartphone adoption, and changing consumer behavior. According to recent reports, Brazil ranks among the largest e-commerce markets in Latin America, with a consistently expanding B2C e-commerce sector.
- The B2C e-commerce segment in Brazil covers a broad range of product categories. Some popular categories include electronics, fashion and apparel, beauty and personal care, home appliances, home furnishings, books, and health-related products. Brazilian consumers increasingly turn to online platforms to fulfill their shopping needs across these categories.
- Mobile commerce has gained significant traction in Brazil's B2C e-commerce market. With the widespread adoption of smartphones and mobile internet access, consumers increasingly use mobile devices to browse and make purchases. E-commerce platforms have responded by developing mobile-optimized websites and apps to enhance the mobile shopping experience.
- B2C e-commerce relies on efficient logistics and delivery networks to ensure timely and reliable product shipments. In Brazil, logistics infrastructure and last-mile delivery services have been continuously evolving to meet the demands of the growing B2C

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e-commerce segment. E-commerce platforms often partner with logistics providers to optimize delivery and enhance customer satisfaction.

- The B2C e-commerce segment in Brazil is thriving, driven by factors such as a large consumer base, expanding Internet and smartphone penetration, diverse product offerings, and evolving payment and logistics infrastructure. With continued advancements in technology and an increasing focus on improving the online shopping experience, the B2C e-commerce market in Brazil is expected to expand further in the coming years.

- According to Semrush, in July 2022, Mercado Livre's website had around 119 million visitors in Brazil, making it the country's most frequented e-commerce portal. With 93 million views, Amazon's Brazilian website (amazon.com.br) is second. Amazon's global site had around 28 million visits during the same period.

Brazil Ecommerce Industry Overview

The Brazilian e-commerce market is fragmented with the presence of major players like Magazine Luiza, Amazon.com, Inc., Casas Bahia, and Shopee Americanas. Players in the market are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

In November 2022, Amazon and Azul Cargo collaborated on e-commerce in Brazil. Amazon and Azul Cargo partnered to speed up the delivery of air freight e-commerce items in North Brazil. The two firms' cooperation also aims to increase package delivery volumes.

In July 2022, Shopee, a Singaporean shopping app owned by Sea Ltd, launched five new distribution centers in Brazil to streamline shipping procedures and reduce wait times.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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