




# Economic and Social Panorama of the Community of Latin American and Caribbean States, 2014



UNITED NATIONS

ECLAC



Economic  
 and Social  
  Panorama  
  of the Community  
  of Latin American  
  and Caribbean States,  
 2014



UNITED NATIONS

ECLAC

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## Foreword

This issue of the *Economic and Social Panorama of the Community of Latin American and Caribbean States* is a contribution by the Economic Commission for Latin America and the Caribbean (ECLAC) to the third Summit of Heads of State and Government of the Community of Latin American and Caribbean States (CELAC), to be held in San José in January 2015.

This document is based on excerpts from some of the annual flagships published by the Commission in 2014: *Statistical Yearbook for Latin America and the Caribbean 2013* (LC/G.2582-P); *Demographic Observatory 2013* (LC/G.2615-P); *Economic Survey of Latin America and the Caribbean 2014* (LC/G.2619-P); *Preliminary Overview of the Economies of Latin America and the Caribbean 2014* (LC/G.2632-P); *Foreign Direct Investment in Latin America and the Caribbean 2013* (LC/G.2615-P); *Latin America and the Caribbean in the World Economy 2014* (LG/G.2625-P) “Social Panorama Social of Latin America 2014. Briefing Paper”; as well as the *Gender Equality Observatory of Latin America and the Caribbean. Annual Report 2013-2014* (LC/G.2626). All these publications are available online at <http://www.cepal.org/en/publications>.

ECLAC has had the opportunity to support CELAC since its inception, at the meetings at which it was first conceived and took shape—in Costa de Saúipe, Brazil; Montego Bay, Jamaica; and Riviera Maya, Mexico—as well as at its establishment in Caracas in 2011. Indeed, we view its creation as a historic event of the utmost importance for the region.

This document is the second such report prepared for a CELAC meeting; the first was prepared in 2014 for the second CELAC Summit held in Havana. It testifies to our ongoing commitment to the countries of the region and, if they so decide, it could be made a regular annual publication to support the work of CELAC.

On this occasion, the report has six sections summarizing the situation in Latin America and the Caribbean as regards economic, social and population affairs, as well as foreign direct investment, trade and gender equality.

We are committed to forging the development of Latin America and the Caribbean from within the region itself, hence our enthusiasm for these efforts and the conviction we share with the Heads of State and Government, gathered in Caracas, who declared “that the unity and political, economic, social and cultural integration of Latin America and the Caribbean constitute both a fundamental aspiration of the peoples [...] and a requirement for the Region to successfully confront the challenges before us”.



CELAC is the most significant political achievement of the region in recent times and ECLAC offers these contributions as a token of its commitment to the Community's consolidation and success.

**Alicia Bárcena**  
Executive Secretary  
Economic Commission for Latin America  
and the Caribbean (ECLAC)

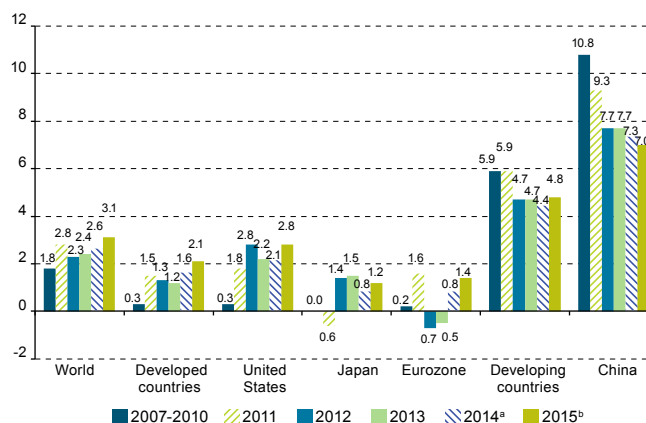
# **I. Economic panorama**



## A. Growth

- The world economy improved slightly in 2014, amid a mixed performance from developed countries and a slowdown in emerging economies.
- Global economic growth increased to 2.6%, compared with 2.4% in 2013. Trends were varied among the developed countries. The United Kingdom stood out with economic growth accelerating to 3.1% in 2014, up from 1.7% the previous year. The United States economy grew by 2.1%, slightly down on the 2013 figure of 2.2%, albeit with a second-half performance that bodes well for greater gains in 2015. Eurozone growth was again limited in 2014, with marked contrasts among countries.
- Growth in developing economies continued to slow in 2014, while nevertheless remaining far more buoyant than in the developed world. On average, developing economies grew by an estimated 4.4% in 2014, with China's growth slowing from 7.7% in 2013 to 7.3% in 2014, and India's rising to 5.4%, from 4.7% in 2013.
- Raw material prices resumed a downward trend, especially in the second half of 2014, albeit with variation from one commodity to another. The estimated average price fall for the group of raw materials steepened to 10.5% in 2014, from a 5.2% drop in 2013. The price of metals fell by 2.3% in 2014, having tumbled by 16.7% in 2013. Food prices were down by about 6.9%, compared with a 15.5% fall in 2013; while energy prices plunged by some 17%, following a 4.6% climb in 2013.

■ **Figure I.1 ■**  
Selected regions and countries: GDP growth, 2007-2015  
(Percentages)

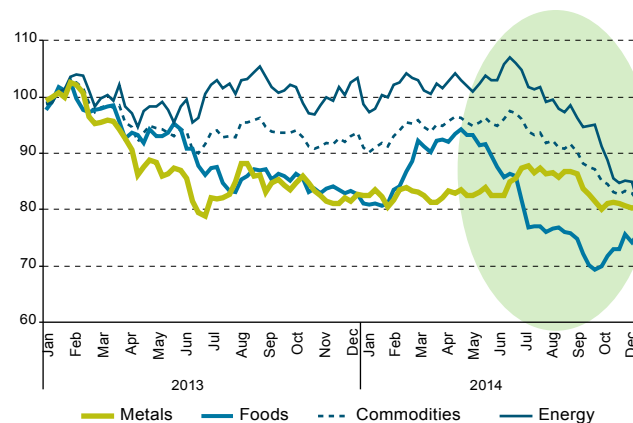


Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of United Nations, Global Economic Outlook, New York, Department of Economic and Social Affairs, October 2014.

<sup>a</sup> Estimates.

<sup>b</sup> Projections.

■ **Figure I.2 ■**  
Index of international commodity prices, weekly values, January 2013 to November 2014  
(Base value at January 2013=100)

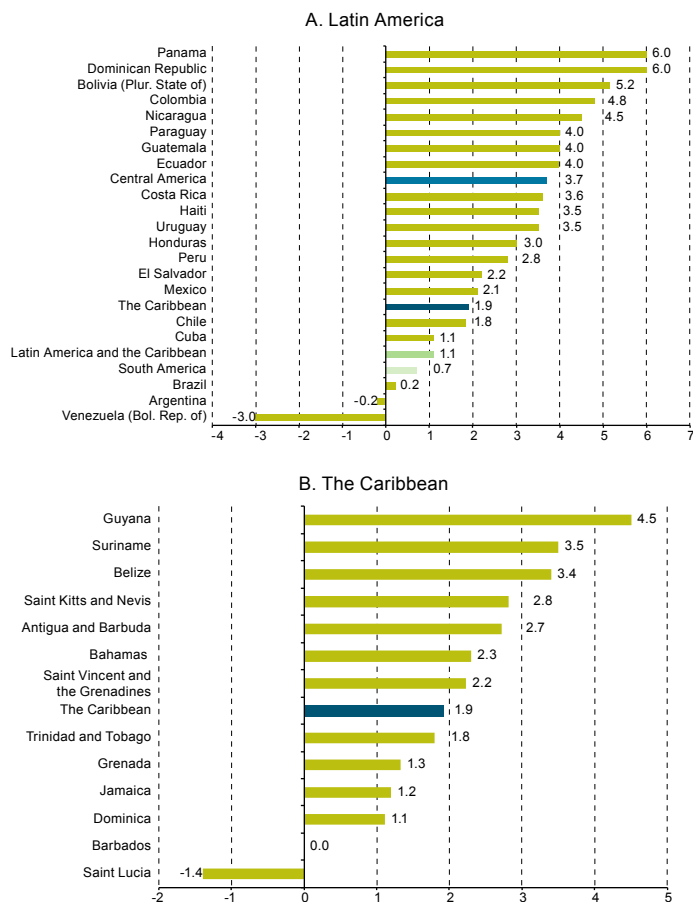


Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of Bloomberg and JP Morgan Commodity Index.

- The GDP of the Latin American and Caribbean region grew by 1.1% in 2014, its slowest rate of expansion since 2009. Considerable differences were observed between countries, with the sluggish regional rate largely determined by slow or negative growth in some of the largest economies: Argentina (-0.2%), the Bolivarian Republic of Venezuela (-3.0%), Brazil (0.2%) and Mexico (2.1%). The median GDP growth rate for the region was 2.8%, broadly in line with the 2013 figure.
- The region's fastest-growing economies were the Dominican Republic and Panama (6.0% in both cases), followed by the Plurinational State of Bolivia (5.2%), Colombia (4.8%) and Nicaragua (4.5%). Argentina, the Bolivarian Republic of Venezuela and Saint Lucia contracted by 0.2%, 3.0% and 1.4%, respectively, while the other economies grew at rates ranging from 0.5% to 4%.
- By subregion, South America posted economic expansion of 0.7% (as against 2.8% in 2013), while Central America (including the Spanish-speaking Caribbean and Haiti) expanded by 3.7% (4.0% in 2013). The Mexican economy grew by 2.1% in 2014, compared with 1.1% in 2013. The English- and Dutch-speaking Caribbean likewise saw growth accelerate on previous years, reaching 1.9% in 2014.

■ **Figure I.3 ■**

**Latin America and the Caribbean: GDP growth rates, 2014<sup>a</sup>**  
*(Percentages on the basis of dollars at constant 2010 prices)*



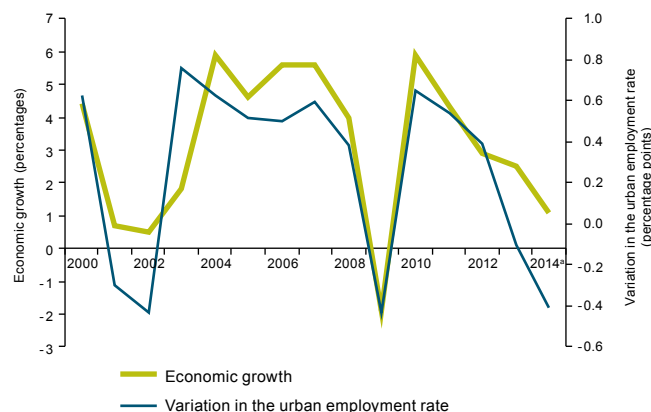
**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official figures.

<sup>a</sup>The figures for 2014 are projections.

## B. Employment

- One significant consequence of low economic growth was weak job creation, leading to a sharper-than-expected 0.4 percentage point fall in the urban employment rate.
- However, despite weak job creation, the urban open unemployment rate edged down from 6.2% to 6.0%.
- Until 2012, declining unemployment reflected a faster rise in employment than in participation, but since 2013 participation has fallen more heavily than employment.
- The labour performance of the region's countries was rather mixed. The regional outcome was determined by similar trends posted in Argentina, Brazil and Mexico, while a variety of results were observed in the other countries.

■ **Figure I.4** ■  
**Latin America and the Caribbean: economic growth and variation in the urban employment rate, 2000-2014**  
*(Percentages and percentage points)*



**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official figures.

<sup>a</sup> Figures for 2014 are projections.

- Although job creation has been weak —especially in wage employment— the labour market situation remains relatively benign. The open unemployment rate is at historically low levels, while other positive aspects include a widespread fall in the hourly underemployment rate, as well as real wage increases (measured at 1.3% according the weighted

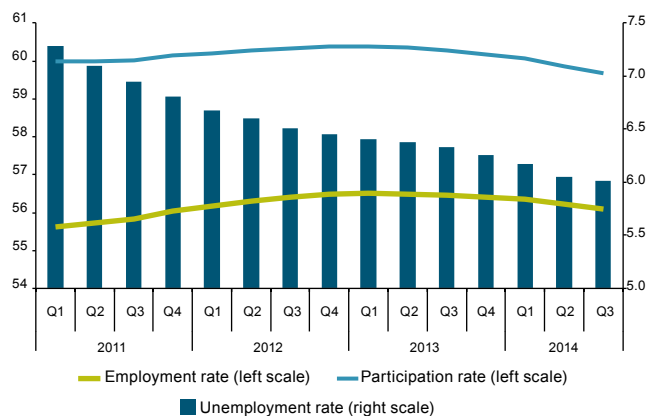
average of 10 countries, or 1.7% by the simple average of those countries).

- Nevertheless, slower job creation is affecting women more than men, bringing an end to previous trends in which some gender labour gaps were narrowing.

■ Figure I.5 ■

**Latin America (10 countries):<sup>a</sup> participation, employment and unemployment rates, rolling years, first quarter 2011 to third quarter 2014**

(Percentages)



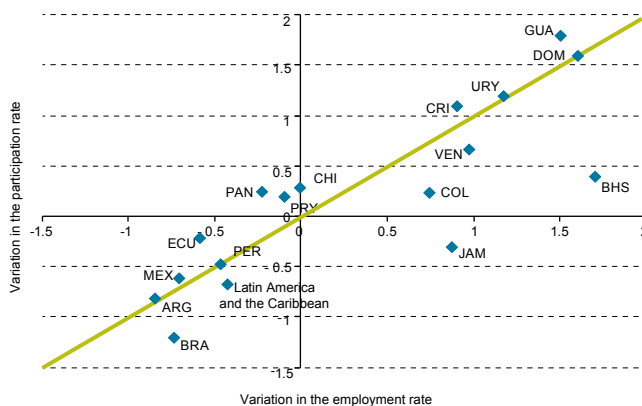
**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official figures.

<sup>a</sup> Includes Argentina, Bolivarian Republic of Venezuela, Brazil, Chile, Colombia, Ecuador, Jamaica, Mexico, Peru and Uruguay.

■ Figure I.6 ■

**Latin America and the Caribbean (16 countries): year-on-year variation in urban participation and employment rates, average for first to third quarters of 2014**

(Percentage points)

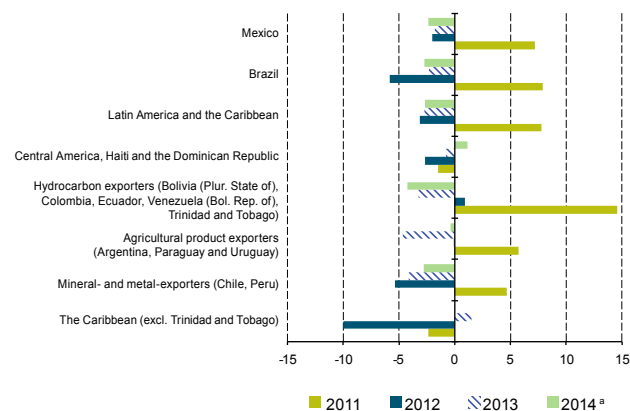


**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official figures.

## C. Terms of trade

- Prices for the region's raw material exports have continued to slide. The terms of trade have accordingly continued to deteriorate, as well, and were down by 2.6% in 2014 for the region overall, although with some differences from one country to another.
- In South America the downturn (-2.7%) is the result of lower prices for the subregion's export commodities, which eroded the terms of trade of the main exporters of mining products and metals, Brazil (2.7%), Chile and Peru (2.8%). The hydrocarbon exporters —Bolivarian Republic of Venezuela, Colombia, Ecuador and Plurinational State of Bolivia— also saw a significant decline (-4.6%) in their terms of trade. However, the countries that export agro-industrial products, Argentina, Paraguay and Uruguay, posted a smaller term-of-trade loss, at -0.4%, than the subregion overall.
- The Central American countries recorded a 1.1% terms-of-trade gain, thanks to higher prices for some of their export products and lower prices for energy imports. Terms of trade for the Caribbean food- and fuel-importing countries (that is, the Caribbean not including Trinidad and Tobago) are set to post a stable gain of 0.1%. Despite the large share of manufactures in its export structure, Mexico's terms of trade were down by 2.4%, similarly to the figure for the region overall, owing to the steep price drops for its export commodities (gold, silver, steel and oil).

■ **Figure 1.7** ■  
**Latin America and the Caribbean: variation in the terms of trade, 2011-2014<sup>a</sup>**  
*(Percentages)*



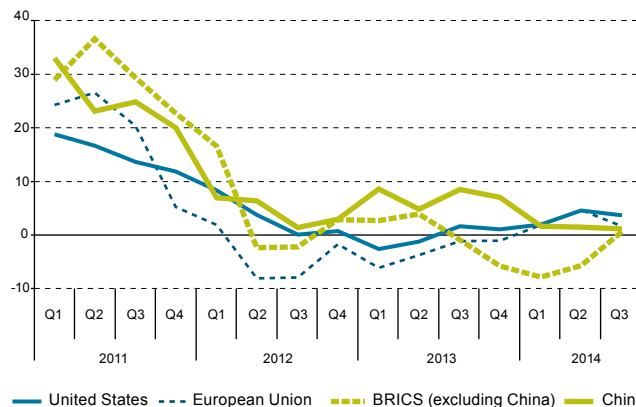
Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official figures.

<sup>a</sup>The figures for 2014 are projections.



- Although the eurozone emerged from recession in the second half of 2013, its year-on-year quarterly growth rate has remained stubbornly below 1% and its recovery is likely to be a lengthy process. China's economy has continued to slow as the country seeks to shift its development model away from exports and investment towards one based chiefly on domestic consumption. Conversely, growth is picking up in the United States, which has boosted its imports from Latin America. United States imports are gathering strength while those of the European Union (28 countries, extraregional trade) are still growing only slowly. China's imports have flattened out at a relatively low level compared with previous years, and the rest of the BRICS countries (Brazil, the Russian Federation, India and South Africa) turned in a negative performance in the first half of 2014.

**Figure I.8**  
**United States, European Union,<sup>a</sup> China and the other BRICS:<sup>b</sup>**  
**year-on-year variation in imports, first quarter of 2011 to third**  
**quarter of 2014**  
*(Percentages)*



**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of figures from the World Trade Organization (WTO).

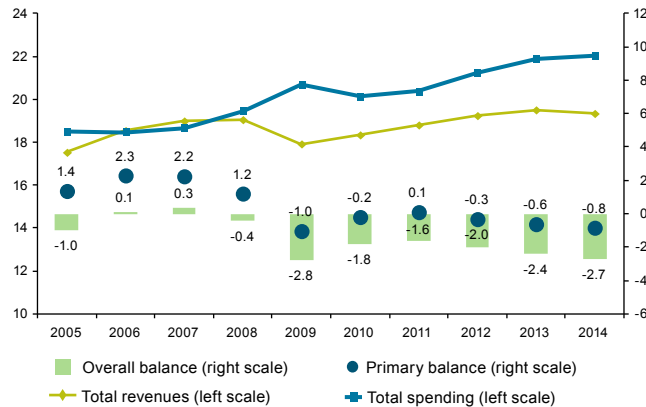
<sup>a</sup> Extraregional trade of 28 countries.

<sup>b</sup> Brazil, Russian Federation, India, China and South Africa.

## D. Fiscal policy

- According to projections, Latin America's fiscal balance deteriorated slightly, on average, in 2014. The subregion's primary deficit (before public debt interest payments) is expected to stand at 0.8% of GDP, and the overall central government deficit will widen from 2.4% of GDP in 2013 to 2.7% in 2014, with a drop in total revenues and a slight upturn in public spending.
- The subregion as a whole has run a fiscal deficit since 2009, but this has not pushed up public debt, which has held steady at about 32% of GDP, with an external component of less than 15% of GDP.
- The Caribbean should see an improved fiscal position in 2014, with the overall average subregional deficit at the central government level shrinking from 4.1% of GDP in 2013 to 3.9% of GDP in 2014.
- Total fiscal revenues fell in the oil-exporting countries and tax revenues rose slightly in several of the region's economies. Estimates for Latin America show total fiscal revenues down by 0.2 percentage points of GDP on average in 2014. In 12 of the 19 countries analysed, the year-on-year variation was less than 0.5 percentage points of GDP, though some countries did see more significant changes.

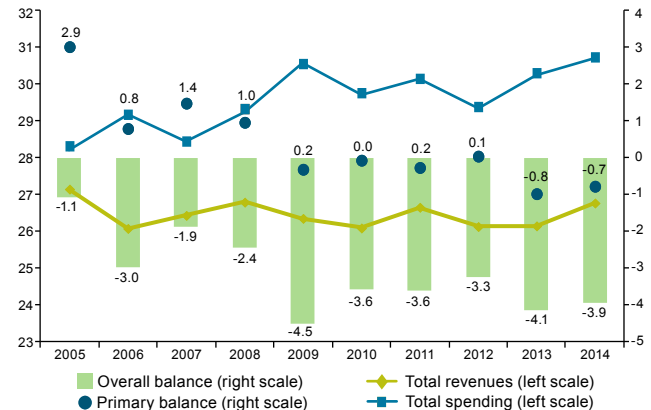
**Figure I.9**  
Latin America (19 countries): central government fiscal indicators, 2005-2014<sup>a</sup>  
(Percentages of GDP)



Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official figures.

<sup>a</sup> Simple averages. The data for 2014 are estimates.

**Figure I.10**  
The Caribbean (13 countries and territories): central government fiscal indicators, 2005-2014<sup>a</sup>  
(Percentages of GDP)



Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official figures.

<sup>a</sup> Simple averages. The data for 2014 are estimates.

- Despite the slowdown, the countries of the region were able to maintain public spending and investment as a percentage of GDP. Capital spending also held steady or even increased as a share of GDP in many countries in 2014. It was down in Central America and the Dominican Republic, however, as well as in the oil-exporting countries, which nevertheless —especially in the cases of Ecuador and the Plurinational State of Bolivia— kept up very high levels of public investment. In the Caribbean and in Brazil,

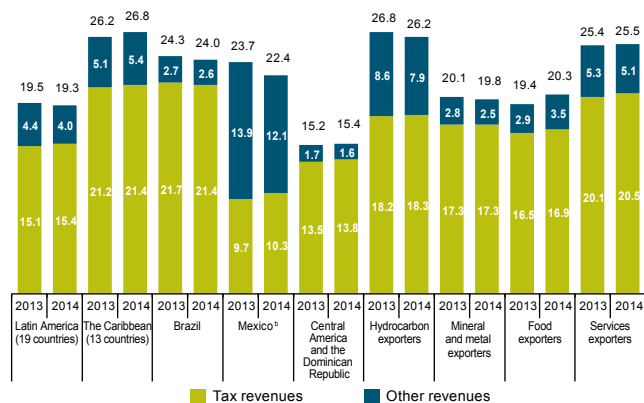
the very heavy burden of interest payments is standing in the way of more active fiscal measures.

- The countries with low public debt (and therefore more readily available financing) have reacted to the slowdown with more active fiscal policies.
- In countries with higher levels of public debt or financing difficulties, the weaker public accounts forecast for 2015 have prompted announcements of budget cuts for the year ahead.

■ Figure I.11 ■

**Latin America and the Caribbean: total fiscal revenues and central government tax revenues by subregion and country grouping, 2013-2014<sup>a</sup>**

(Percentages of GDP)



Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official figures and budgets and estimates.

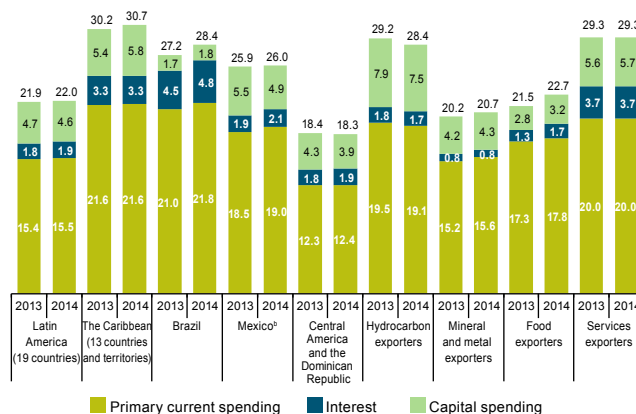
<sup>a</sup> The data for 2014 are estimates.

<sup>b</sup> Federal public sector.

■ Figure I.12 ■

**Latin America and the Caribbean: disaggregated central government public spending by subregion and country grouping, 2013-2014<sup>a</sup>**

(Percentages of GDP)



Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official figures.

<sup>a</sup> The data for 2014 are estimates.

<sup>b</sup> Federal public sector.

## II. Foreign direct investment



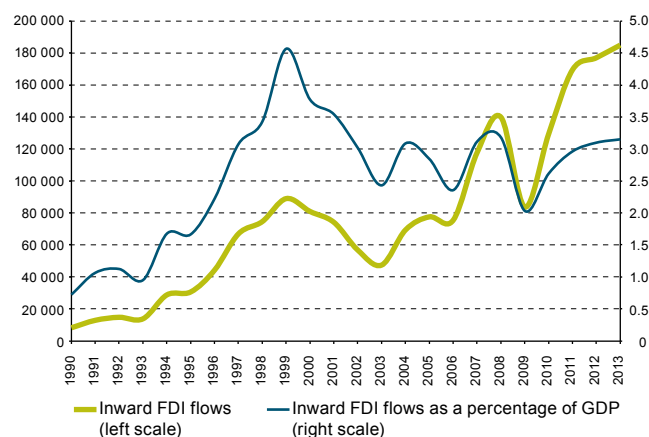
Foreign direct investment (FDI) in Latin America and the Caribbean reached a new all-time high in 2013, at US\$ 188.101 billion, 6% more than the 2012 figure. This means

that FDI inflows were virtually stable for the third year running, especially measured in nominal terms.

## A. Foreign direct investment in Latin America and the Caribbean

- Global FDI flows rose by 11%, although behind this global figure lie large differences between regions. Whereas FDI in the European Union recovered strongly (38%), after a heavy fall in 2012 (-56%), flows to the United States slipped 5% and those to developing and transition economies were up by 6% and 45%, respectively.
- Growth in the region slowed to 2.5% in 2013, and United States monetary policy sowed uncertainty in the markets, which led to heavy depreciation in the region's main currencies. Prices for natural resources, though still at high levels by historical standards, continued to fall owing to uncertainty regarding the economic situation in China and the developed world.
- Mexico regained its position as the second largest recipient of FDI in the region, with total inflows of US\$ 38.286 billion, over double the amount received the year before. Mexico thus ranked behind Brazil, which received US\$ 64.046 billion in FDI, 2% down on 2012 but ahead of Chile, which received US\$ 20.258 billion, 29% less than in 2012.
- By sector, services received the highest proportion of FDI inflows in 2013, with 38%, followed by manufacturing (36%) and natural resources (26%). However, these averages mask large differences between countries and subregions.
- Natural resources capture over 50% of FDI inflows in several countries, and as much as 70% in the Plurinational State of Bolivia. In fact, in South America (not including Brazil), natural resources receive more FDI than services, and manufacturing only small amounts.

**Figure II.1**  
**Latin America and the Caribbean: foreign direct investment inflows and FDI inflows as a proportion of GDP, 1990-2013<sup>a</sup>**  
*(Millions of current dollars and percentages of GDP)*

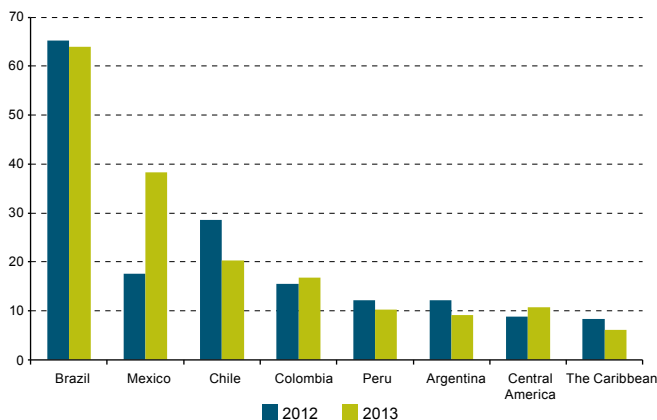


**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official figures and estimates at 8 May 2014.

<sup>a</sup> FDI figures indicate inflows of foreign direct investment, minus disinvestments (repatriation of capital) by foreign investors. The FDI figures do not include flows into the main financial centres of the Caribbean. These figures differ from those set out in the 2013 editions of the *Economic Survey of Latin America and the Caribbean* and the *Preliminary Overview of the Economies of Latin America and the Caribbean* because they show the net balance of foreign investment, that is, direct investment in the reporting economy (FDI) minus outward FDI.

- Not all FDI in the region represents a net inflow of capital. In 2013 capital contributions accounted for 42% of total FDI, reinvested earnings 38%, and inter-company loans 20%. Although reinvestment of profits was lower in 2013 than in 2012, the profits reported by transnational firms rose 2%, to US\$ 111.662 billion.
- The region's economies also vary greatly in terms of the origin of investments. The United States remains the largest investor in Latin America and the Caribbean generally, with a particularly prominent role in Central America (30% of inflows) and Mexico (32%). Europe overall is the largest investor in Brazil (46%), Mexico (54%) and Colombia (36%). In all the countries except Mexico, trans-Latin firms make significant contributions to FDI flows. This is especially true in Ecuador (where FDI by trans-Latins accounts for 46% of inflows), Colombia (30%) and Central America (39%). Inflows from Asia have held steady.
- In Latin America, FDI inflows have stabilized at a high level in the past three years, but the impact of these investments on the well-being of the region's inhabitants is still a matter of debate.
- Investments in technology-intensive sectors have more potential to contribute to development through knowledge transfer and local capacity-building. But FDI in high-tech manufacturing represents only a small proportion of the total and showed no change in 2013.

■ **Figure II.2** ■  
**Latin America and the Caribbean (selected countries): inward foreign direct investment, 2012-2013**  
*(Billions of dollars)*



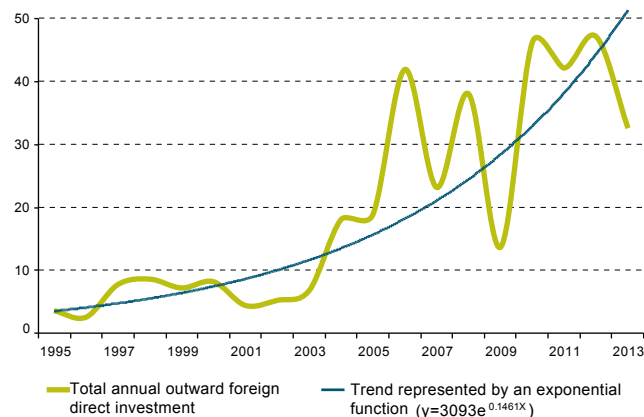
Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official figures and estimates as of 8 May 2014.

## B. Latin American and Caribbean transnational corporations: strategies and outcomes

- Between 2003 and 2013, the developing countries' share of total outward FDI jumped from 10% to 39%. The most active regions were East and South-East Asia, which accounted for more than 50% of these capital flows, and Latin America and the Caribbean, which lagged behind somewhat. In consequence, South-South FDI has boomed in the past 20 years.
- Latin America has not remained on the sidelines of this process, and more and more of the region's enterprises are beginning to invest outside their home countries. Initially, the vast majority of trans-Latins came from a small group of countries: Argentina, Brazil, Chile and Mexico. These corporations operated in sectors related to the abundant natural resources available in their home countries, in basic infrastructure services such as power and telecommunications, and mass-market services such as retail trade, air transport and finance. The first stage of international expansion was focused on nearby markets within the region, and subsequently —mainly in the case of firms from larger countries— spread to more distant markets, first in North America and later, albeit on a much smaller scale, in the European Union, Asia, Oceania and in some cases, Africa.

■ **Figure II.3**  
Latin America and the Caribbean: outflows of foreign direct investment, 1995-2013

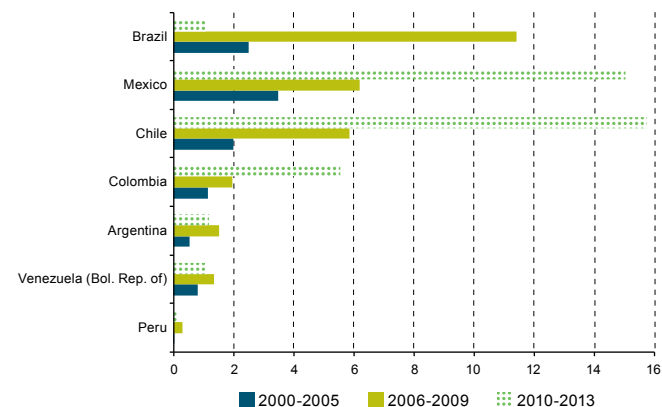
(Billions of dollars)



Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official information.

■ **Figure II.4**  
Latin America and the Caribbean: foreign direct investment by the main investor countries, annual averages, 2000-2013<sup>a</sup>

(Billions of dollars)



Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official information.

<sup>a</sup>Data for Argentina and Colombia cover up to the third quarter of 2013.



## C. Effects of foreign direct investment on employment in Latin America and the Caribbean

- Strong investment inflows into Latin American and Caribbean countries exert enormous influence over these economies, while also raising a number of concerns over the characteristics that such investments imprint on their production specialization profiles and, especially, on their domestic labour markets.
- During the 1990s, the most significant FDI processes were privatizations, mergers and acquisitions, especially in South America. During this period, most investment did not create new production capacities to spur the recruitment of additional workers, but instead was associated with companies' restructuring processes, which implied rationalization measures and labour shedding.
- Greenfield investments represented around 60% of inward FDI in the region between 2003 and 2013, following an upward trend (from 50% of FDI in 2003-2007 to 70% in 2010-2013).
- These investments only accounted for about 5% of net job creation in the region in the period 2003-2013 (in an optimistic calculation).
- The jobs content of these greenfield investments varies extensively according to the sectors and subregions in which they are made, and depends on the profile of the projects implemented. For every US\$ 1 million invested, only one job is created in extractive activities, while the same investment creates two jobs in natural-resource-intensive manufacturing. These sectors accounted for about 47% of investment amounts and 25% of new jobs announced in investment projects during the 10-year study period.

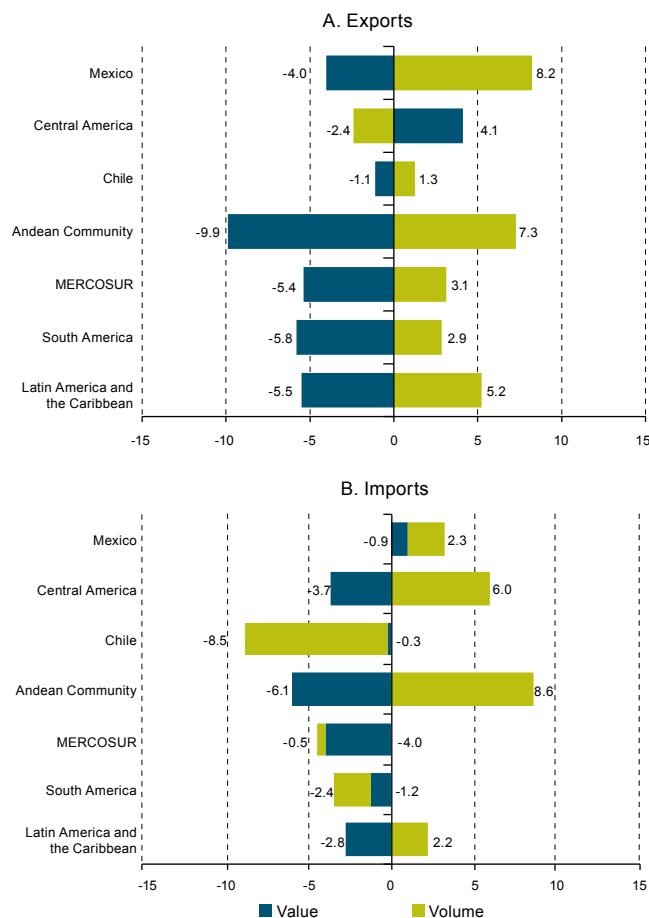
### **III. The region in the world economy**



## A. Trade

- The steadily deteriorating global economic outlook is likely to dampen trade in Latin America and the Caribbean in 2014.
- As a group, the developing economies will grow at a similar pace to that of 2013 (about 4.7%), led by East and South Asia. China and India are projected to grow at around 7% and 5%, respectively.
- In 2012 and 2013 the volume of global trade expanded by 2.1% and 2.3%, respectively, a performance which fell far short of pre-crisis levels, when exports were growing twice as fast as global output.
- World trade grew even less in value terms than it did by volume, as a result of falling export prices. Weak trade performance in 2013 is largely attributable to slack demand for imports in developed countries, partially offset by a modest increase in the demand for imports in developing countries.
- During the first half of 2014, the value of Latin American and Caribbean merchandise exports slipped by 0.3% against the year-earlier period. This change was the result of a 5.2% increase in exports by volume, and a 5.5% drop in prices. The value of imports also dropped by 0.6%, as a 2.2% increase in volume was not enough to offset a 2.8% fall in prices. The drop in export prices was widespread and occurred across all the subregions, but was felt particularly in the Andean Community.
- During the first half of 2014, goods exports to other countries in Latin America and the Caribbean, Asia (not including China) and the European Union, fell by 5.6%, 1.3% and 0.5%, respectively, in value terms, compared with the same period in 2013. The region's exports to China and the United States posted the fastest growth.

■ **Figure III.1** ■  
**Latin America and the Caribbean: year-on-year variation in foreign trade by value and volume, January to June 2014**  
*(Percentage variation)*



Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official information from the countries.

## B. Value chains

- A general assessment based on data for international trade in intermediate goods confirms that, except for Mexico and Central America, the region has limited participation in the three value chains known as Factory North America, Factory Europe and Factory Asia. In fact, the region is not an important supplier of non-primary intermediate goods for any of these chains, nor is it a major importer

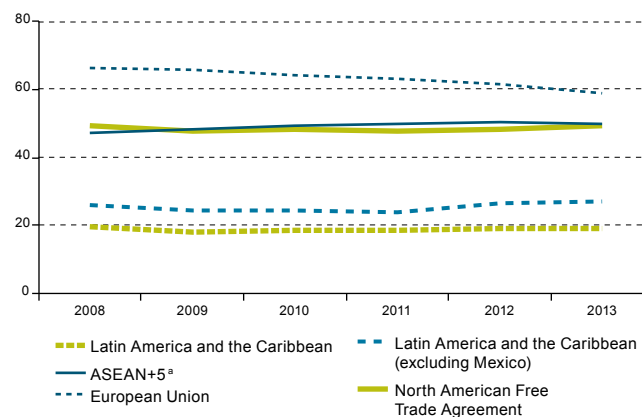
of intermediate goods from the participating countries. Mexico is an exception, as medium-tech products represent a large share of its intermediate goods exports to its North American Free Trade Agreement (NAFTA) partners. All the same, the country's integration into Factory North America is based mainly on the export of final goods produced from imported inputs, with little value added domestically.

## C. Production integration

- Although the regional market has strong potential to boost production and export diversification, the region is not taking advantage of this. In 2013, just 19% of regional exports stayed within the region. This figure rises to 25% if Mexico is left out but, even so, the intraregional portion of total exports is far smaller in Latin America and the Caribbean than in other major regions of the world economy.
- Despite the high manufacturing density of intraregional trade, most of it consists of finished products, as the small share of intermediate goods reveals. Intermediate goods account for over 30% of the value of goods traded between the countries of "factory Asia" and for almost 20% between the member countries of the North American Free Trade Agreement (NAFTA), but for only 10% between the countries of Latin America and the Caribbean. This is evidence of a low degree of production integration between the Latin American and Caribbean economies. In fact, imports of parts and components by the region's largest economies originate mostly from extraregional suppliers.

■ Figure III.2 ■

**Selected groupings: <sup>a</sup> intra-group exports as a share of total exports, 2008-2013**  
(Percentages)



**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of information from the United Nations Commodity Trade Database (COMTRADE).

<sup>a</sup> Includes the 10 member countries of the Association of Southeast Asian Nations (ASEAN) and China, Japan, the Republic of Korea, Hong Kong Special Administrative Region of China and Taiwan Province of China.

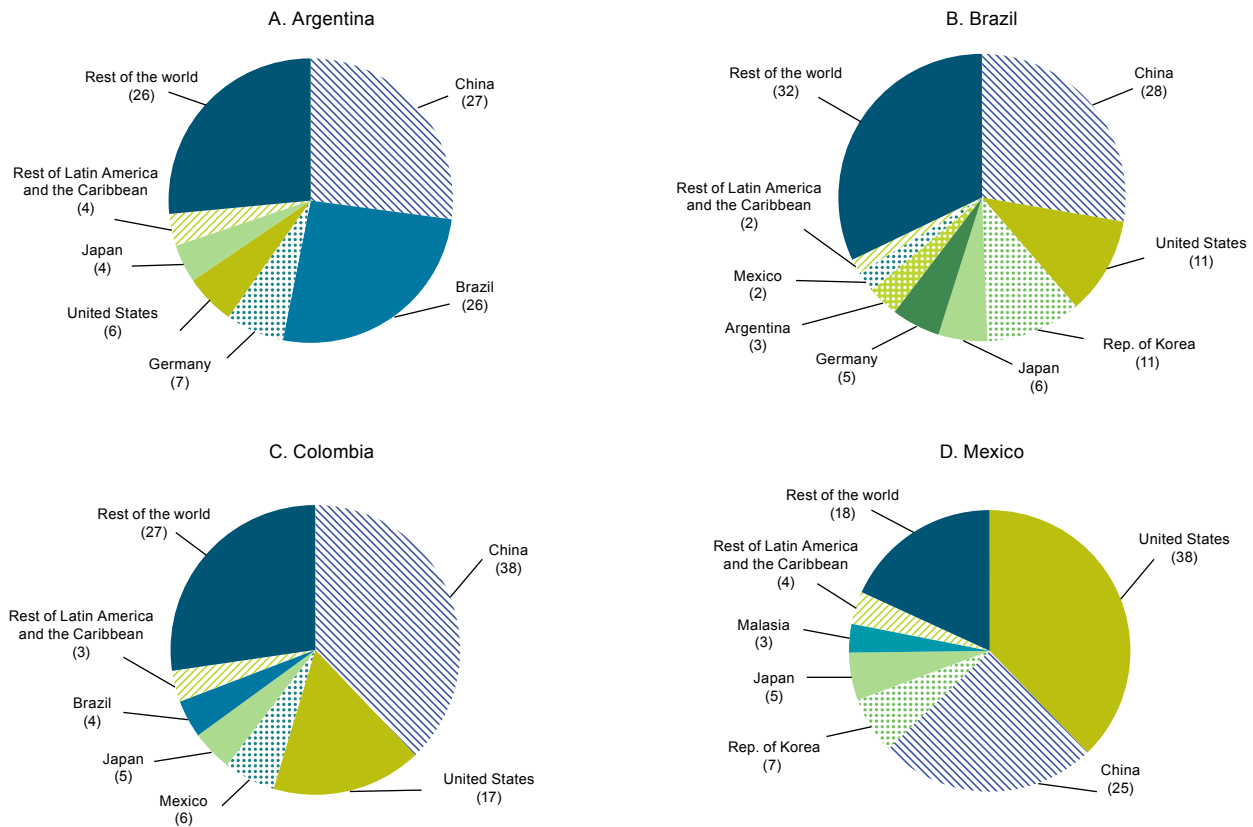
- In short, for most of the region's countries, the most immediate opportunities for engaging with value chains lie within the regional market. There are three explanations for this. First, trade within value chains is particularly sensitive to distance-related costs. Second, the relatively high manufacturing density of intraregional

trade suggests that it is the most conducive setting for establishing production linkages. Third, the bold regionwide expansion of the trans-Latins opens up similar opportunities, provided that those companies establish networks of local suppliers of goods and services in the countries where they set up.

■ Figure III.3 ■

**Latin America (selected countries): distribution by origin of parts and components imports, 2013**

(Percentages)



Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of information from the United Nations Commodity Trade Database (COMTRADE).



## **IV. Social panorama**





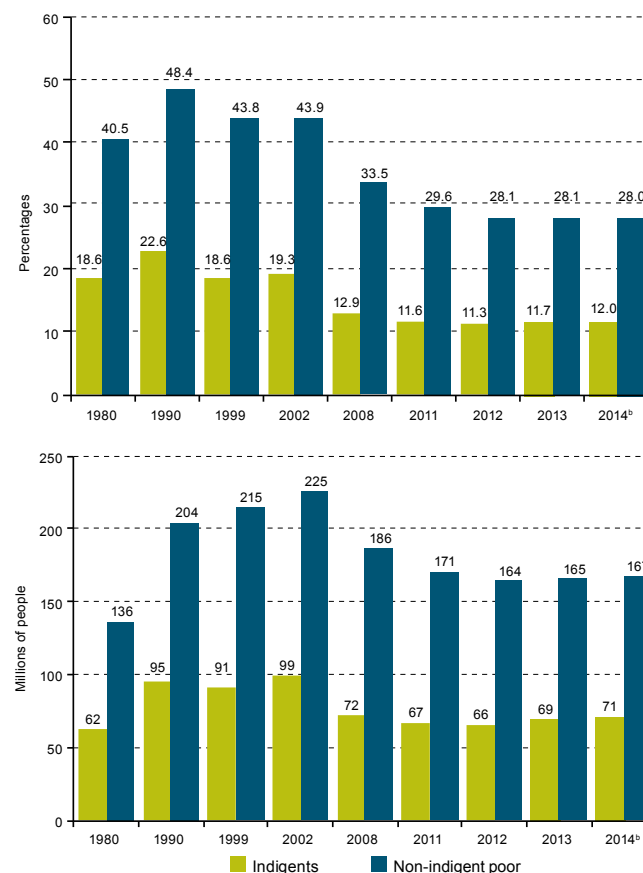
## A. Poverty (measured by income)

- The poverty rate in Latin America stood at 28.1% in 2013, while the indigence or extreme poverty rate was 11.7%. These percentages represent 165 million poor people, including 69 million in extreme poverty.
- These values show that the poverty rate was largely unchanged in respect of levels seen in 2012 (28.1%). There was, however, a slight uptick in extreme poverty, which rose by 0.4 percentage points on 2012 levels (11.3%). This means that there were no substantial changes in number of poor in 2013, but the number in extreme poverty rose by about 3 million while the number of non-indigent poor decreased by a similar figure.
- Estimates for the region show that the downward trend in the rates of poverty and extreme poverty has slowed and even reversed in the early years of this decade, a situation which, coupled with population growth, has increased the number of people living in extreme poverty in 2013.
- One of the hallmarks of poverty in Latin America is its higher incidence among younger rather than older segments of the population. Compared to adults aged over 55, the poverty rate for those aged under 15 is 2.8 times higher, and the rate for the 15-24 age group is 1.9 times higher.
- Poverty rates also vary by gender, particularly in the age group comprising adults most likely to participate in the labour market. In Latin America on average the poverty rate among women aged 25-49 years is 1.2 times that of men in the same age group.

■ **Figure IV.1 ■**

### Latin America: poverty and indigence, 1980-2014<sup>a</sup>

(Percentages and millions of people)



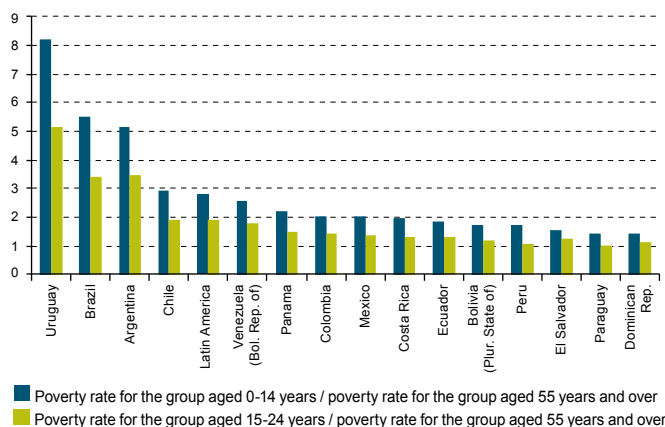
**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of special tabulations of data from household surveys conducted in the respective countries.

<sup>a</sup> Estimate for 19 countries, including Haiti. Cuba not included.

<sup>b</sup> Projection.

- Poverty rates among those who have completed upper-secondary or tertiary education are, respectively, 26% and 74% lower than among the population at large. Poverty rates among those with three years or fewer of education is 66% higher than the average for the general population, while it is 34% and 15% higher among those with four to six years and seven to nine years of education, respectively.
- Poverty rates are 90% higher among the unemployed, 23% higher among inactive persons and 18% among self-employed workers than in the total population. Poverty rates among wage workers are on average 41% below those of the general population, further evidence of the crucial role of employment in staving off poverty and indigence.

■ **Figure IV.2** ■  
**Latin America (14 countries): ratio between rates of poverty among people of between 0 and 14 years and between 15 to 24 years in respect of those among people 55 and over, around 2013**



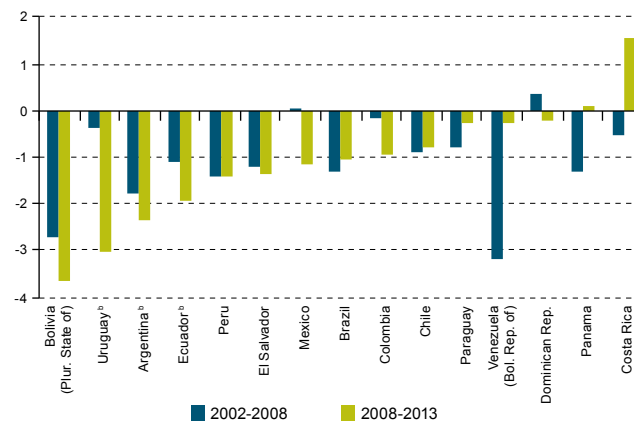
■ Poverty rate for the group aged 0-14 years / poverty rate for the group aged 55 years and over  
 ■ Poverty rate for the group aged 15-24 years / poverty rate for the group aged 55 years and over

**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of special tabulations of data from household surveys conducted in the respective countries.

## B. Income distribution

- In the early 2000s inequality began to decrease in most of the countries of the region, and this trend is still holding. Between 2002 and 2013 the average Gini coefficient for the region fell approximately 10%, from 0.542 to 0.486.
- With regard to income distribution across population groups, the share of the poorest 20% of households increased between 2008 and 2013, from an average of 5.2% to 5.6% of the total.<sup>1</sup> By contrast, the same period saw the average share of the richest quintile decrease from 48.4% in 2008 to 46.7% in 2013.
- In 11 of the 15 countries reviewed, the share of the poorest quintile rose during the period, while the share of the richest quintile shrank.

■ **Figure IV.3 ■**  
**Latin America (15 countries): annual variation of Gini coefficient, 2002-2008 and 2008-2013<sup>a</sup>**  
*(Percentages)*



**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of special tabulations of data from household surveys conducted in the respective countries.

<sup>a</sup> Includes only the countries for which information was available for the period between 2011 and 2013. The classification order corresponds to the magnitude of the variation in the second subperiod (2008-2013).

<sup>b</sup> Urban areas.

<sup>1</sup> Calculated on the basis of the 15 countries for which the most recent data are available. Does not include Guatemala, Honduras or Nicaragua.

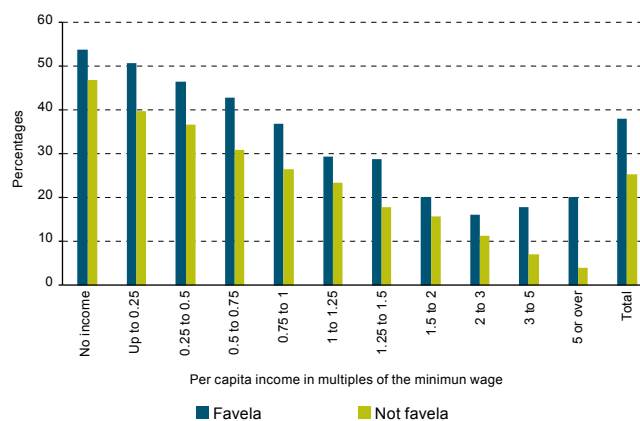
## C. Residential segregation and the reproduction of inequalities

- In Latin America, socioeconomic groups generally exhibit distinctive location patterns in cities. If these patterns involve physical distances that hinder or prevent interaction, recognition and cooperation between these groups, social cohesion and city governance are likely to be weakened. Where the location pattern of socioeconomic groups helps perpetuate social inequalities in the city, socioeconomic residential segregation ensues, posing a fundamental challenge for the development of inclusive and sustainable cities.
- One of the hallmarks of urbanization in the region is the concentration of poor populations in peripheral areas, especially in large cities (those with a population of more than 1 million inhabitants). This pattern is typically disadvantageous, since these groups are subject to more precarious conditions in terms of access to housing, basic services and community infrastructure, among other factors. The other side of the coin is that groups with high socioeconomic status have consolidated their presence in a few areas of the city which, as well as having abundant private resources owing to residents' income levels, are usually well connected to city centres and hubs of good quality employment. Residents of these areas benefit from a higher quality of life and more efficient urban services than in the rest of the city.
- For example, analysis of the “neighbourhood effect” on the behaviours of children and adolescents, especially with regard to the likelihood of adolescent motherhood, shows that, in the case of Brazil’s favelas, a female favela

resident has invariably higher odds of becoming a mother by the age of 19 than a non-favela resident, according to the 2000 census. In the 2010 census, these results were corroborated for well-known favelas (Rocinha, Complexo do Alemão and Maré) and affluent areas (Tijuca); the likelihood of teenage motherhood in the three favelas was higher than the city average and much higher than in wealthy neighbourhoods.

■ Figure IV.4 ■

**Brazil: women aged 19 who are mothers and who have always resided in the same municipality, by per capita household income and favela residence or non-residence, 2000**  
(Percentages and multiples of the minimum wage)

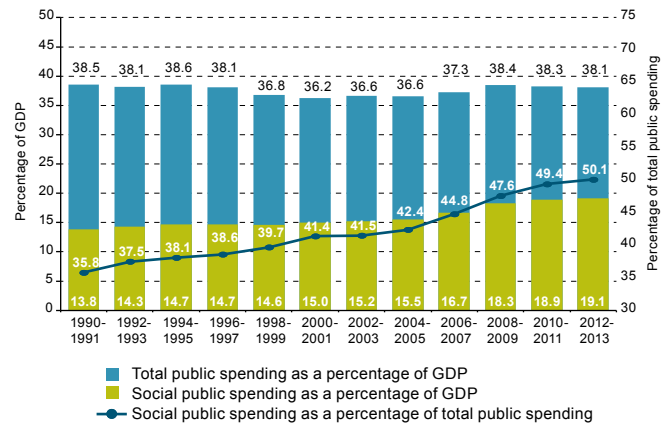


Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of special processing of 2000 census microdata.

## D. Social spending in Latin America

- In spite of ups and downs in the economic cycle, the trend in the region until 2013 was towards a real increase in the resources available for financing social services and cash transfers to households.
- In the early 1990s, social spending as a share of gross domestic product (GDP) stood at 13.8%, rising steadily, albeit slowly, in the bienniums under review to reach 16.7% in 2006-2007. It then soared to 19.1% of the region's GDP in 2012-2013. In the last year under consideration, social spending in the region (21 countries) amounted to nearly US\$ 685 billion (at constant 2005 prices). In 2012 the overall growth trend in social spending in both absolute and relative terms began to weaken somewhat.

■ **Figure IV.5 ■**  
**Latin America and the Caribbean (21 countries):<sup>a</sup> public social spending and total public spending as shares of GDP, and social public spending as a share of total spending, 1990-1991 to 2012-2013<sup>b</sup>**  
*(Percentages of GDP and of total public spending)*



**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of social spending data.

<sup>a</sup> Argentina, Bolivarian Republic of Venezuela, Brazil, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, Plurinational State of Bolivia, Trinidad and Tobago, and Uruguay.

<sup>b</sup> Weighted average for the countries. The figures on total public spending correspond to official data, mostly from the functional classification of public spending, and may not correspond to those based on an economic classification of spending.



## V. Population

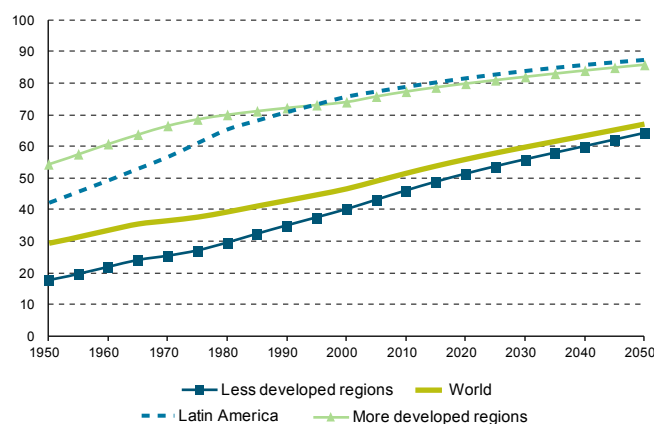




ECLAC estimates and projections place the population of Latin America and the Caribbean at 623 million in 2014.

One of Latin America's characteristics is that its urban population is larger, in percentage terms, than the world average. Until the early 1960s the subregion was predominantly rural, but the application of the import-substitution policies and the absence of reform in the countryside intensified rural-to-urban migration. As a result, the urban population, as a proportion of the total rose dramatically between 1950 and 1995. This trend continued until the end of the twentieth century, by which time Latin America had overtaken the most developed regions in terms of urban population. Today, with about 80% of its population residing in cities, Latin America has the most urbanized population of any region in the developing world.

**Figure V.1**  
**World, Latin America and developed and developing regions:**  
**urban population estimates and projections, 1950-2050**  
*(Percentages)*



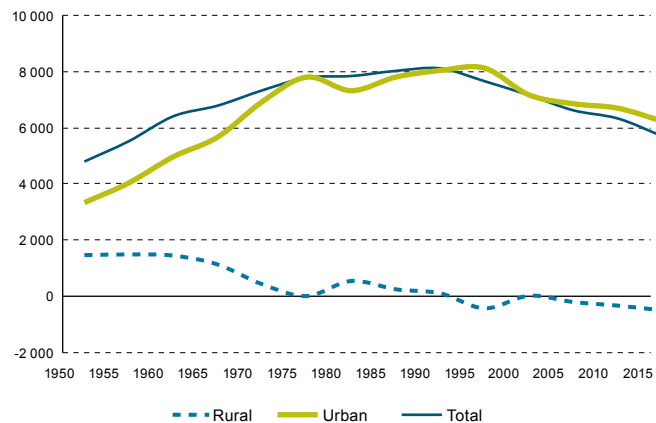
**Source:** United Nations, World Urbanization Prospects: The 2011 Revision [online] <http://esa.un.org/unup/>, 2012 and Latin American and Caribbean Demographic Centre (CELADE)-Population Division of ECLAC, population estimates and projections, 2013 revision.

## A. Urbanization and demographic transition

- It is estimated that in 1950, about 68 million people were living in urban areas and 93.5 million in rural areas. Projections indicate that in 2015, there will be about 491 million people living in urban areas and almost 122 million in rural areas. This means that between 1950 and 2015, the urban population will have multiplied by a factor of 7.2, while the rural population will only be 1.3 times larger. This is the result of rapid growth in the number of city dwellers, and the stagnation and subsequent decline of the rural population.
- In the 1950s, the urban population grew 1.6 times faster than the total population, and while the two rates have followed similar trajectories, urban population growth has remained higher. Demographic growth since the 1970s has been driven by the expansion of its urban population.

■ **Figure V.2** ■

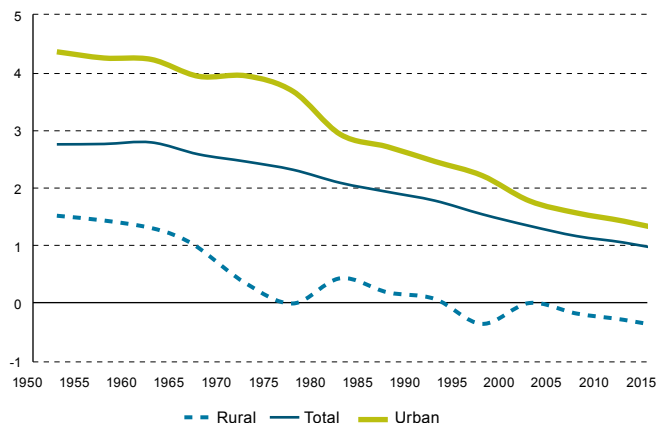
**Latin America: estimated average annual growth of the total, rural and urban populations, by five-year periods, 1950-2015**  
(Thousands of people)



**Source:** Latin American and Caribbean Demographic Centre (CELADE)-Population Division of ECLAC, population estimates and projections, 2013 revision.

■ **Figure V.3** ■

**Latin America: estimated average annual growth rate of the total, rural and urban populations, by five-year periods, 1950-2015**  
(Per hundred)



**Source:** Latin American and Caribbean Demographic Centre (CELADE)-Population Division of ECLAC, population estimates and projections, 2013 revision.

## B. Diversity in urbanization in Latin America

- Regions and countries can be classified in four groups by degree of urbanization (or percentage of urban population), corresponding to the different stages of the urban transition: delayed transition, incipient or moderate transition, full transition, and advanced transition.
- The regional average conceals the broad heterogeneity of urbanization in Latin America, in terms of both the degree of urbanization reached, and the speed at which countries have become urbanized.
- Different rates of urbanization observed in the region, highlighting the rapidity of the process between 1950 and 1970 in the Bolivarian Republic of Venezuela, Brazil, Colombia, the Dominican Republic, Ecuador, Guatemala, Haiti, Mexico, Nicaragua and Peru. Urban population growth in these countries outpaced the average for Latin America during this period. Between 1970 and 1990, Brazil and Ecuador maintained this rapid pace of urbanization, while Costa Rica, the Dominican Republic, El Salvador, Haiti, Honduras and the Plurinational State of Bolivia all outpaced the regional average.
- It is projected that by 2020, 64% of the Latin American population will live in countries at the advanced transition phase (in which more than 80% of the population is urban), rising to over 86% by 2050.

■ Table V.1 ■

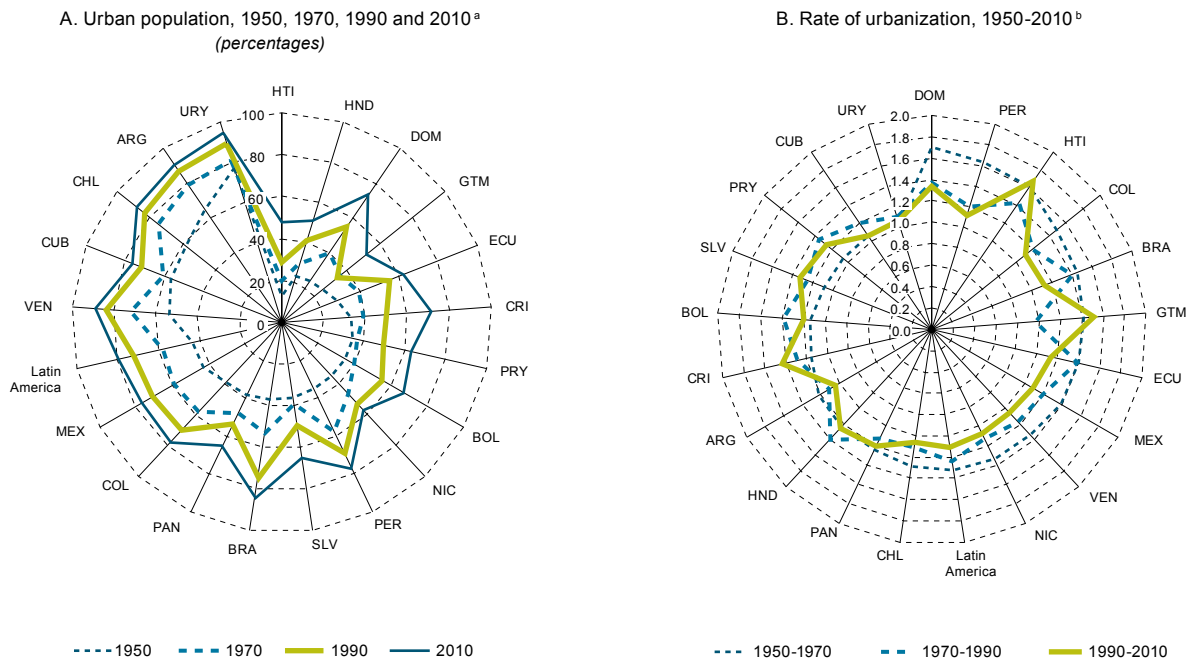
**Latin America: distribution of countries by stage of urban transition process, 1950, 1970, 1990 and 2010**

Year	Delayed transition (<50% urban population)	Incipient or moderate transition (50% - 70% urban population)	Full transition (70% - 80% urban population)	Advanced transition (>80% urban population)
1950	World average, Latin America BOL, BRA, COL, CRI, ECU, SLV, GTM, HTI, HND, MEX, NIC, PAN, PRY, PER, DOM	ARG, CHL, CUB, VEN	URY	
1970	World average BOL, CRI, ECU, SLV, GTM, HTI, HND, NIC, PAN, PRY, DOM	Latin America BRA, COL, CUB, MEX, PER	ARG, CHL, VEN	URY
1990	World average SLV, GTM, HTI, HND	BOL, COL, CRI, ECU, NIC, PAN, PRY, PER, DOM	Latin America BRA, CUB, MEX	ARG, CHL, CUB, VEN
2010	HTI (47.5%)	World average BOL, ECU, SLV, GTM, HND, NIC, PAN, PRY	Latin America (78.7%) COL, CRI, CUB, MEX, PER, DOM	ARG, BRA, CHI, URY, VEN

**Source:** United Nations, World Urbanization Prospects. The 2011 Revision [online] <http://esa.un.org/unup/>, 2012 and Latin American and Caribbean Demographic Centre (CELADE)-Population Division of ECLAC, population estimates and projections, 2013 revision.

■ Figure V.4 ■

**Latin America: urban population and rate of urbanization, 1950-2010**



**Source:** Latin American and Caribbean Demographic Centre (CELADE)-Population Division of ECLAC, population estimates and projections, 2013 revision.

<sup>a</sup> Countries are ordered by smallest to largest urban population percentage in the first year analysed (1950).

<sup>b</sup> The rate of urbanization is measured by the relative difference between the urban population percentage observed in a given year and the percentage recorded 20 years previously. Countries are ordered by fastest to slowest urban population growth rate in the first period represented (1950-1970).

## **VI. Gender equality**



The efforts States in the Latin American and Caribbean region have made to eradicate violence against women have seen substantial headway on a number of fronts over the past 20 years. Progress has been greatest as regards the recognition of rights, legal reforms and implementation of promising policies. National legal systems have expanded the scope of State action, and cast light on the persistence of certain problems and the emergence of further issues.

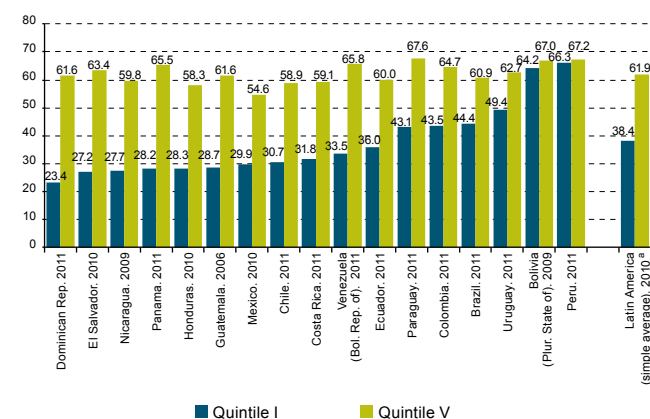
Three pillars represent those aspects of women’s autonomy related to the ability to earn one’s own income and control assets (economic autonomy), control one’s own body (physical autonomy) and fully participate in decisions affecting their lives and society (decision-making autonomy).

## A. Economic autonomy

- At present, in Latin America and the Caribbean, more than 100 million women (some 50% of the female working-age population) are part of the labour force. Of that total, 22.8 million entered the labour market in the past 10 years; this represents one of the most sweeping social and economic transformations in recent decades.
- Gains in the female labour market participation rate vary among and within countries —the latter according to age group, educational attainment and socioeconomic sector of the population.
- The regional labour participation rate for women averages 62% in the wealthiest quintile and only 38.4% in the first quintile.
- Women’s autonomy is also threatened by the high proportion with no income of their own: in 2010 this figure was 32.7%, compared with 12.1% for men. A substantial percentage of women with no income of their own perform unpaid work, especially domestic and care work. But among employed women the number of hours of unpaid work is also very high —in some cases as much as four times the figure for men.

■ Figure VI.1 ■

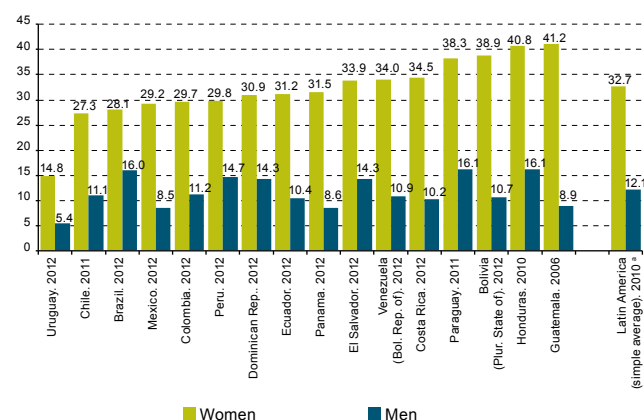
**Latin America (17 countries): economically active female population by income quintile, latest data available**  
(Percentages)



**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of special tabulations of data from household surveys conducted in the respective countries.  
<sup>a</sup> Simple average of the nearest year’s data available for each country.

■ Figure VI.2 ■

**Latin America (16 countries): population without own income, by sex, latest period available**  
(Percentages)



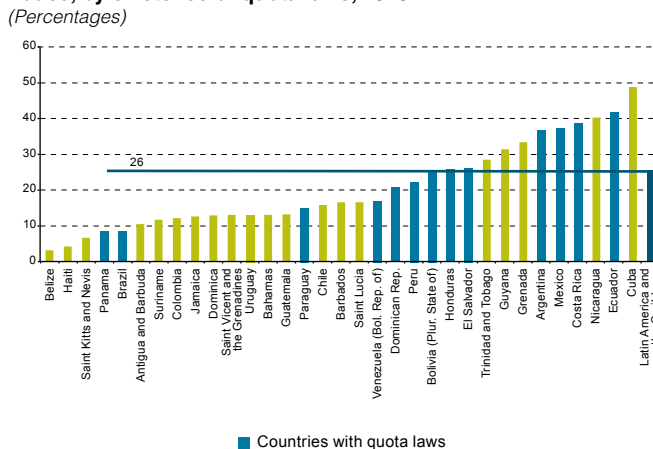
**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of special tabulations of data from household surveys conducted in the respective countries.  
<sup>a</sup> Simple average of the nearest year’s data available for each country.



## B. Decision-making autonomy

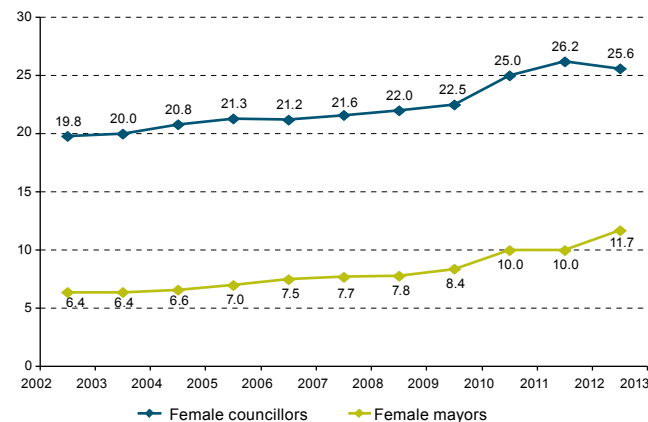
- Five women presidents currently hold office in Latin America and the Caribbean; in recent years the number of female legislators, judges and mayors has grown. Substantial progress has thus been made over the past 20 years in this sphere.
- Between 2003 and 2013, the proportion of women in legislative bodies in the region climbed from 19% to 26%. The differences among countries are striking: in a number of parliaments (including Argentina, Costa Rica, Ecuador, Mexico and Nicaragua), around 40% are women; in some (Brazil and Panama) they fall short of 10%.
- The increase in the proportion of female mayors has been smaller and progress slower, so most countries fall below 20% and the regional average is just 11.7%, only 1.7 percentage points higher than the average for 2011 (10.0%). As for female city council members, the regional average has risen over the past 10 years, from 19.8% in 2002 to 25.6% in 2012.
- The presence of more women in decision-making areas has brought historically private matters into the public discourse. Among these are care of minors, older persons and the ill, access to sexual and reproductive health, and gender-based violence and its relationship to physical and decision-making autonomy.
- With respect to gender institutions, the number of countries with machineries at ministerial level increased from 35% in 2009 to 45% in 2013 (nine countries, two more than in 2009).

**Figure VI.3**  
Latin America (19 countries) and the Caribbean (14 countries):  
elected women in national parliaments, single house or lower  
house, by existence of quota laws, 2013  
(Percentages)



Source: Economic Commission for Latin America and the Caribbean (ECLAC), Gender Equality Observatory for Latin America and the Caribbean, on the basis of official sources.

**Figure VI.4**  
Latin America and the Caribbean: elected women councillors and  
mayors, 2002-2012  
(Percentages)

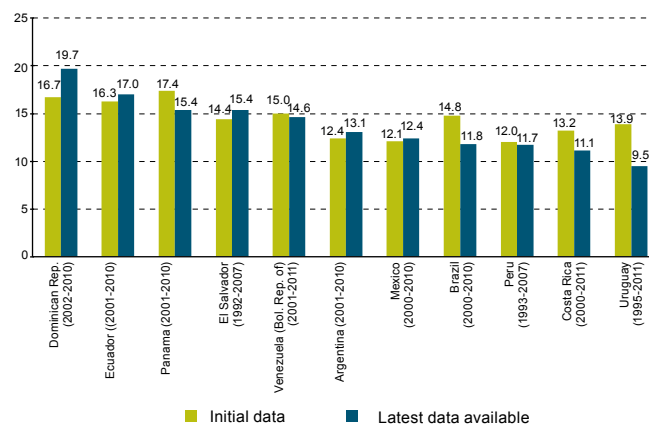


Source: Economic Commission for Latin America and the Caribbean (ECLAC), Gender Equality Observatory for Latin America and the Caribbean, on the basis of official sources.

## C. Physical autonomy

- The gains in this regard have meant acknowledging that violence against women is a threat to their autonomy and accepting State intervention.
- Women's autonomy in the area of sexual and reproductive health still faces challenges that in a number of countries take the form of restrictions on access to fertility control for the population as a whole or certain segments of the population (lack of appropriate and timely policies and measures aimed at adolescents). Other challenges are presented by the lack of education in this area and by the imposition of unwanted pregnancy.
- One serious consequence is adolescent pregnancy. Although fertility rates for women overall are trending down, not only has there been no significant drop among adolescent women but some countries have seen an increase among lower-income, less educated adolescents.
- Adolescent pregnancy and motherhood are more than a major barrier to overcoming poverty and to young women entering the workplace. They also put girls and young women at greater risk of physical or sexual violence by their partners.
- Three Latin American countries, as well as Mexico City, now have legislation that allows abortion. In five countries abortion is illegal in all its forms, including when the woman's life is in danger. Of the 11 countries that permit abortion in certain circumstances, 2 of them do so only when the woman's life is in danger.

■ **Figure VI.5**  
**Latin America (11 countries): women aged 15-19 who are mothers, initial data and latest data available**  
 (Percentages)

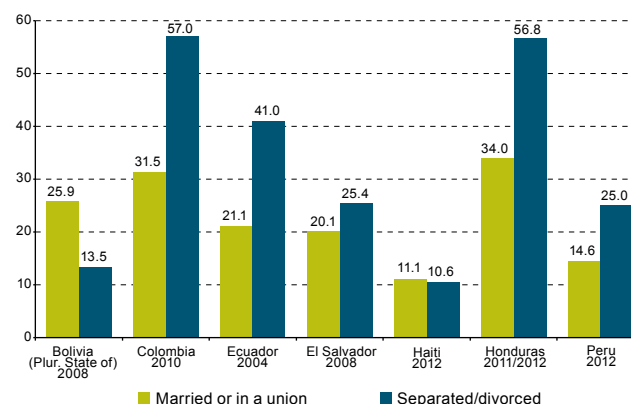


**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), Gender Equality Observatory for Latin America and the Caribbean, on the basis of official sources.

## D. Violence against women

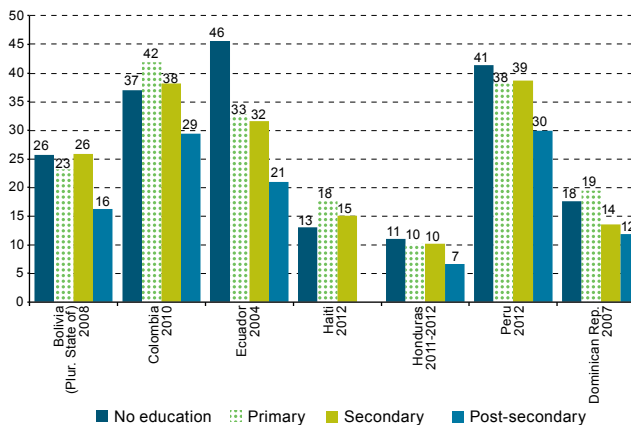
- There are two types of instruments for measuring violence against women: (a) surveys, which gauge the incidence and prevalence of violence against women; and (b) administrative records, which yield information on incidents that have taken place and have been entered in the information systems of public services (health, police, justice, Ministry of the Interior) as well as information on State resources available.
- Physical and/or sexual violence against women by an intimate partner or former partner cuts across all countries and socioeconomic strata and is territorially diverse.
- The strongest and most consistent factors associated with intimate partner violence are being separated or divorced, the number of children and a family history of the father physically abusing the mother or stepmother. All of these conditions increase women's vulnerability and dependence in the context of naturalization of violence.
- Age at first union is an important factor for the likelihood of suffering violence. In all countries with such data available, women who were less than 15 years old at the time of their first union reported having been a victim of violence in a higher proportion than those who entered their first union at an older age.
- In Ecuador and Peru about 38% of indigenous women have experienced physical or sexual violence at the hands of a partner; this figure is estimated to be 24% of indigenous women in Guatemala and 20% in Paraguay.
- Femicide is one of the areas where the information void is most apparent, because of the many different sources of information, as well substantial underreporting, a lack of methodological validation, no official figures and no agency assigned to generate them, among other issues.

**Figure VI.6**  
Latin America (7 countries): women who have experienced some form of physical or sexual violence by their partner or former partner, by marital status  
(Percentages)



Source: Economic Commission for Latin America and the Caribbean (ECLAC), Gender Equality Observatory for Latin America and the Caribbean on the basis of Demographic and Health Surveys (DHS) [online] <http://www.measuredhs.com/> and Centers for Disease Control and Prevention.

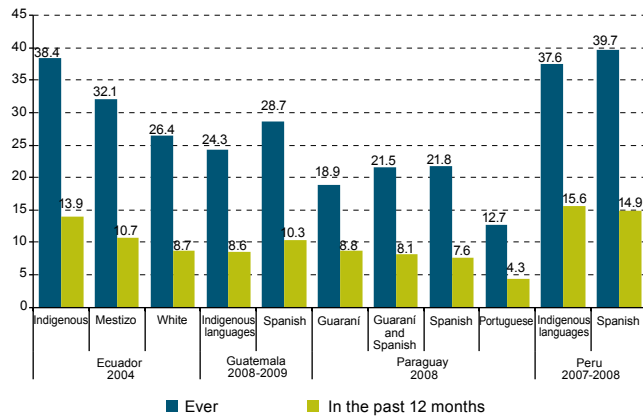
**Figure VI.7**  
Latin America (7 countries): women who had ever experienced intimate-partner or former-partner physical violence, by educational level, most recent survey data available  
(Percentages)



Source: Economic Commission for Latin America and the Caribbean (ECLAC), Gender Equality Observatory for Latin America and the Caribbean on the basis of Demographic and Health Surveys (DHS) [online] <http://www.measuredhs.com/> and Centers for Disease Control and Prevention.

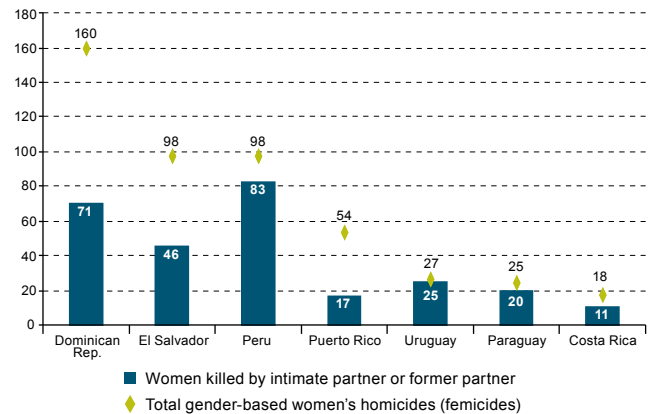
- The Gender Equality Observatory for Latin America and the Caribbean gathers official information provided by the governments of the region, facilitating progress in establishing the numbers of women are killed by an intimate partner or former partner. Simultaneously, information on the total number of violent deaths of women (femicide) has been compiled on the basis of responses from seven countries.
- The processing of the indicator for deaths of women caused by a current or former intimate partner has improved substantially since 2010, when ECLAC began compiling data on seven countries in Latin America, two in the Caribbean, and Spain. Currently, information is available for 12 countries in Latin America and 8 in the Caribbean, plus Spain and Portugal.

■ **Figure VI.8** ■  
**Latin America (selected countries): intimate-partner physical or sexual violence among women aged 15-49 who are married or in a union, by language spoken in the home, around 2010**  
 (Percentages)



Source: Economic Commission for Latin America and the Caribbean (ECLAC), “Mujeres indígenas en América Latina: dinámicas demográficas y sociales en el marco de los derechos humanos”, *Project Documents*, No. 558 (LC/W.558), Santiago, Chile, 2013.

■ **Figure VI.9** ■  
**Latin America (7 countries): femicide or homicide of women for reasons of gender and women killed by a current or former intimate partner, latest data available**

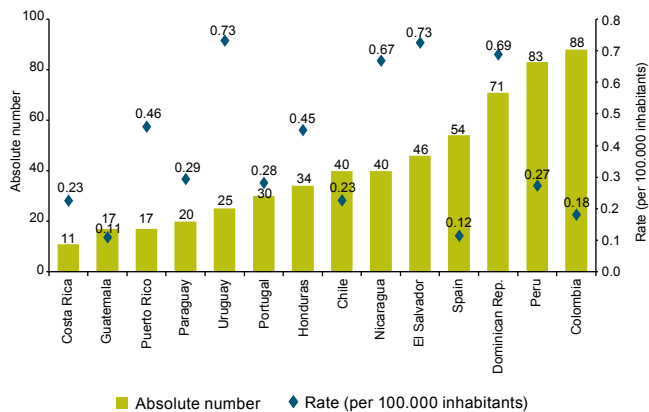


Source: Economic Commission for Latin America and the Caribbean (ECLAC), Gender Equality Observatory for Latin America and the Caribbean.

■ Figure VI.10 ■

**Latin America (12 countries) and Iberian Peninsula (2 countries): women killed by an intimate partner or former partner, latest period available**

(Absolute numbers and rates)

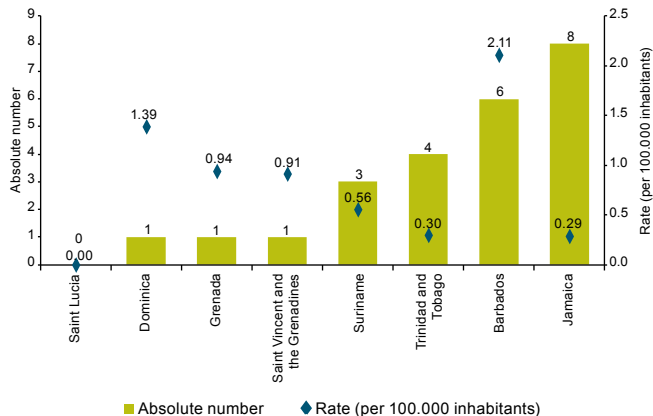


Source: Economic Commission for Latin America and the Caribbean (ECLAC), Gender Equality Observatory for Latin America and the Caribbean, December 2013.

■ Figure VI.11 ■

**The Caribbean (8 countries): women killed by an intimate partner or former partner, latest period available**

(Absolute numbers and rates)



Source: Economic Commission for Latin America and the Caribbean (ECLAC), Gender Equality Observatory for Latin America and the Caribbean, December 2013.



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