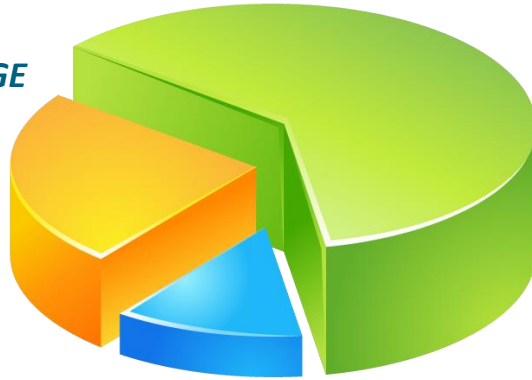


Mercados Consumidores no Brasil: Evolução, Regressão e Perspectivas

Marcelo Neri
FGV Social/CPS e EPGE

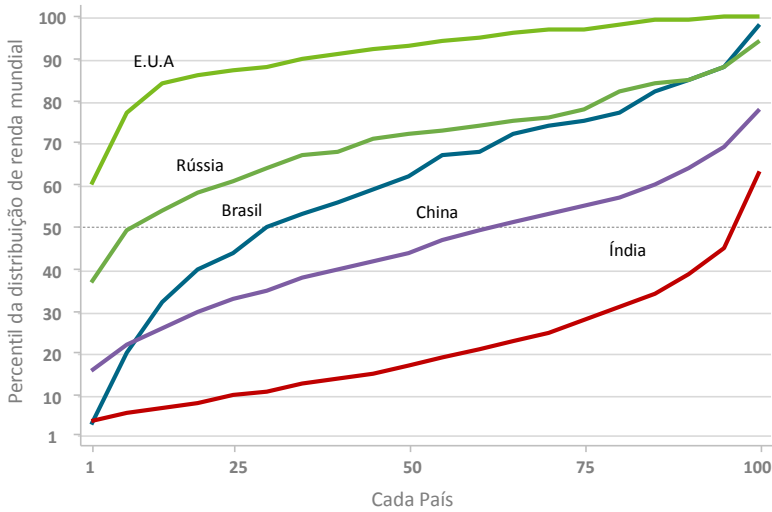


Outline :

- **Boom and Bust – Economic Classes (A,...C,...E);** Total & Sectoral **Sales Performance** (Supermarkets, CITs, Pharmaceuticals etc.) in Brazil
- **Updating Income Distribution** Data (level, inequality), **International Comparisons** and Other Sales related Determinants (uncertainty, interest rates, habits, etc.)
- **Understanding Changes in** Income Distribution (role of unemployment, inflation, different public transfers, etc.)
- **Microtargeting** - Monitoring specific Social Groups Economic Performance (Gender, Age, Location, etc.)
- **Past Forecasts** - The Workings of Previous Income Distribution and Economic Classes (A, B, C, D, E) Projections based on Household Surveys Microdata (PNADC, Census, POF etc) & Methodological Aspects.
- **Current Demographic Forecasts** - Evidences on Health and **GSK** related Issues (**do more, feel better, live longer**) and doctors distribution

Distribuição de Renda Relativa ao Mundo

PIB per capita brasileiro (PPP) era 93,7% do PIB mundial em 2012

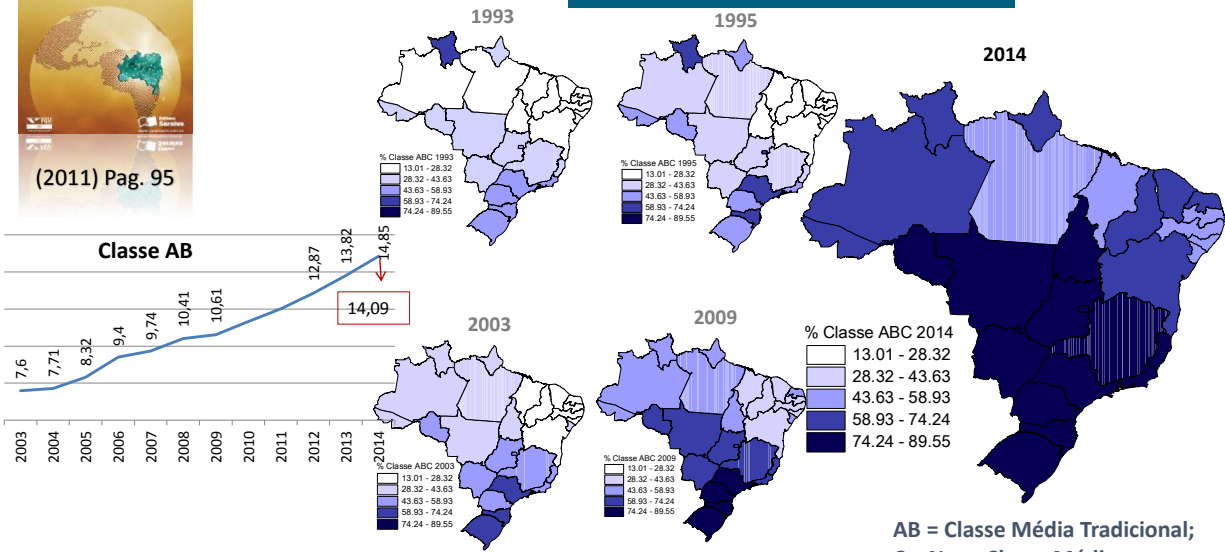


Fonte: Milanovic (2011)



Mercados Consumidores:

Evolução das Classes ABC

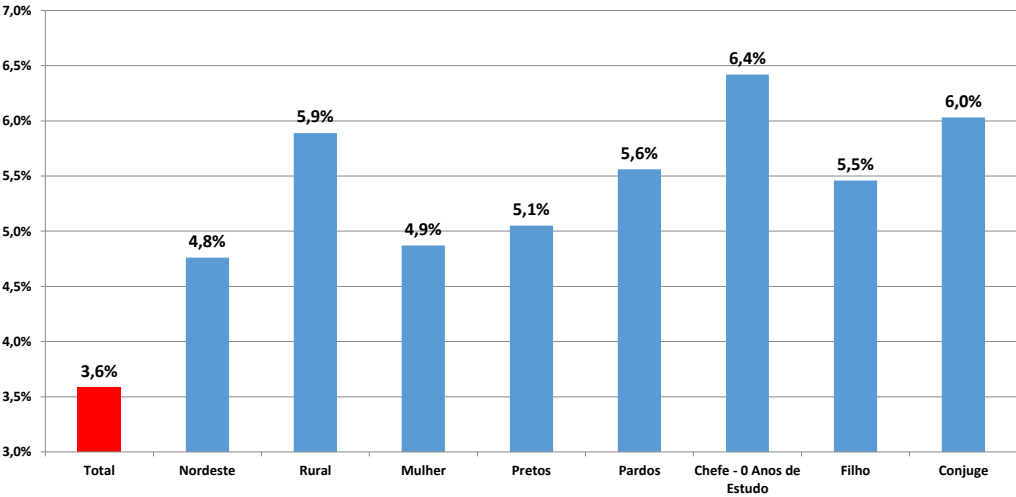


Fonte: FGV Social/CPS a partir dos microdados da PNAD/IBGE

Crescimento

Desigualdade Horizontal

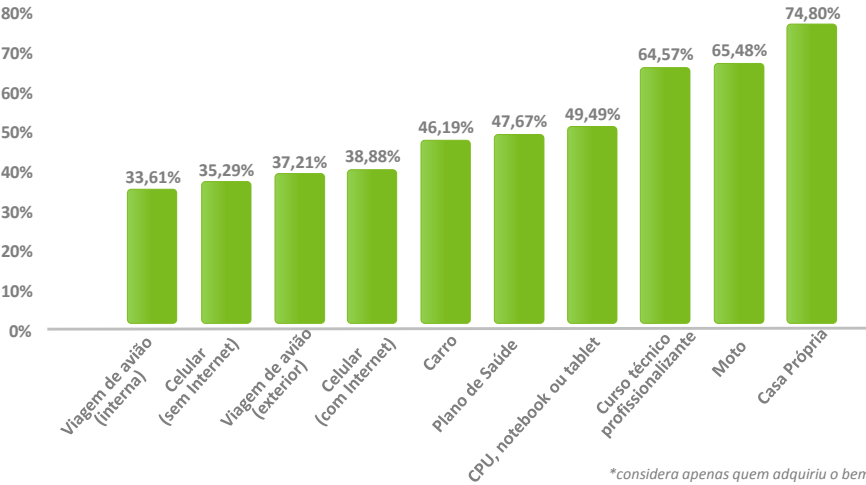
Taxa de Crescimento Anual da Renda Individual- 2001 a 2014



Fonte: CPS/FGV a partir dos microdados da PNAD/IBGE

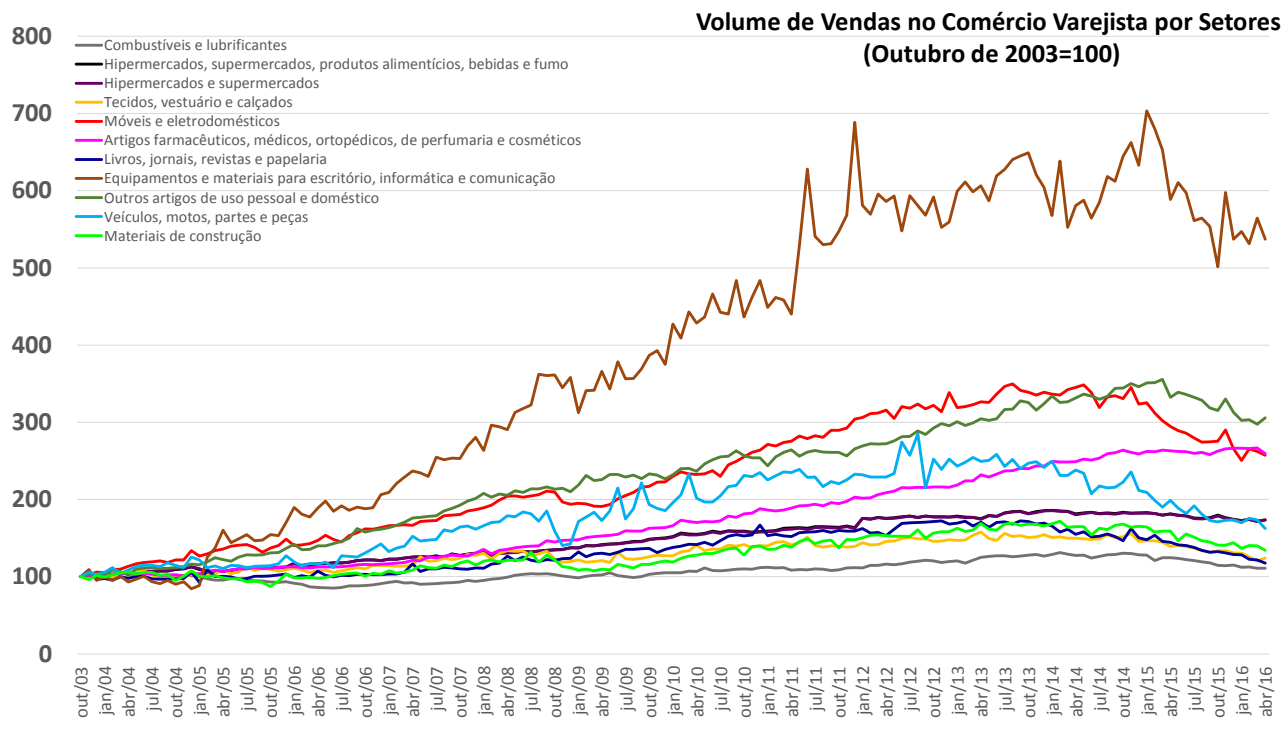
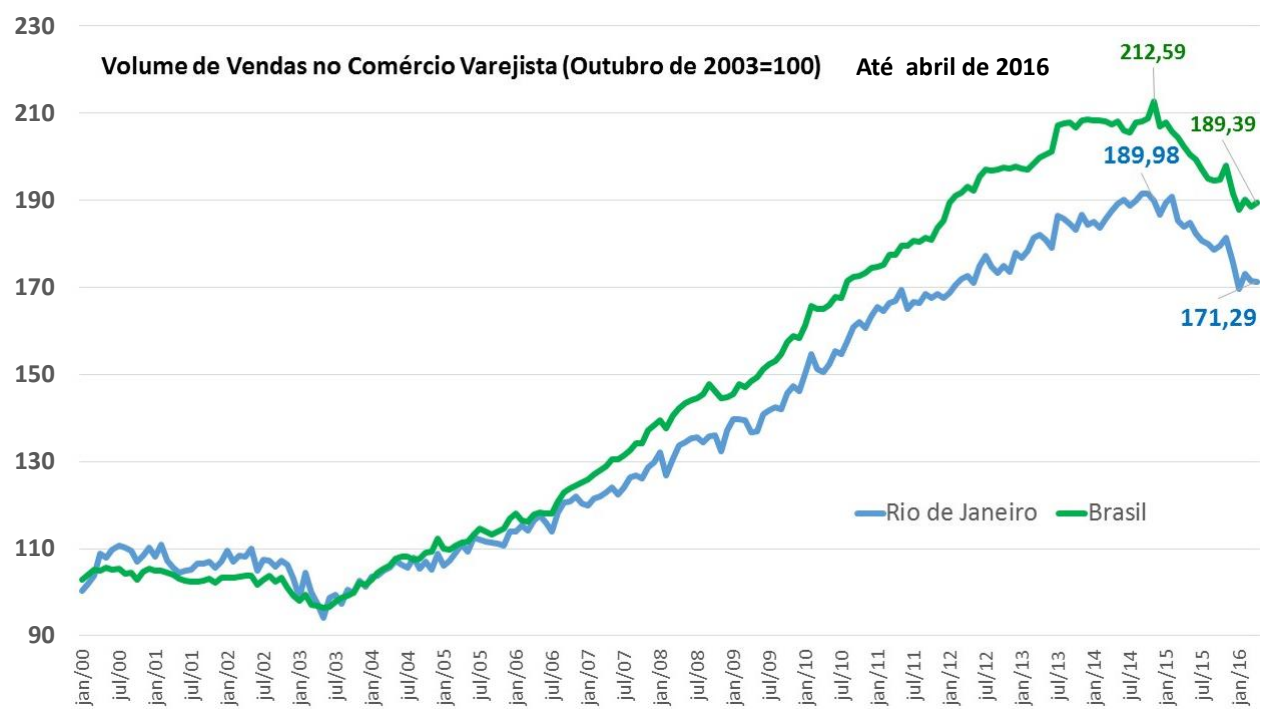
1ª Aquisição de Bens e Serviços

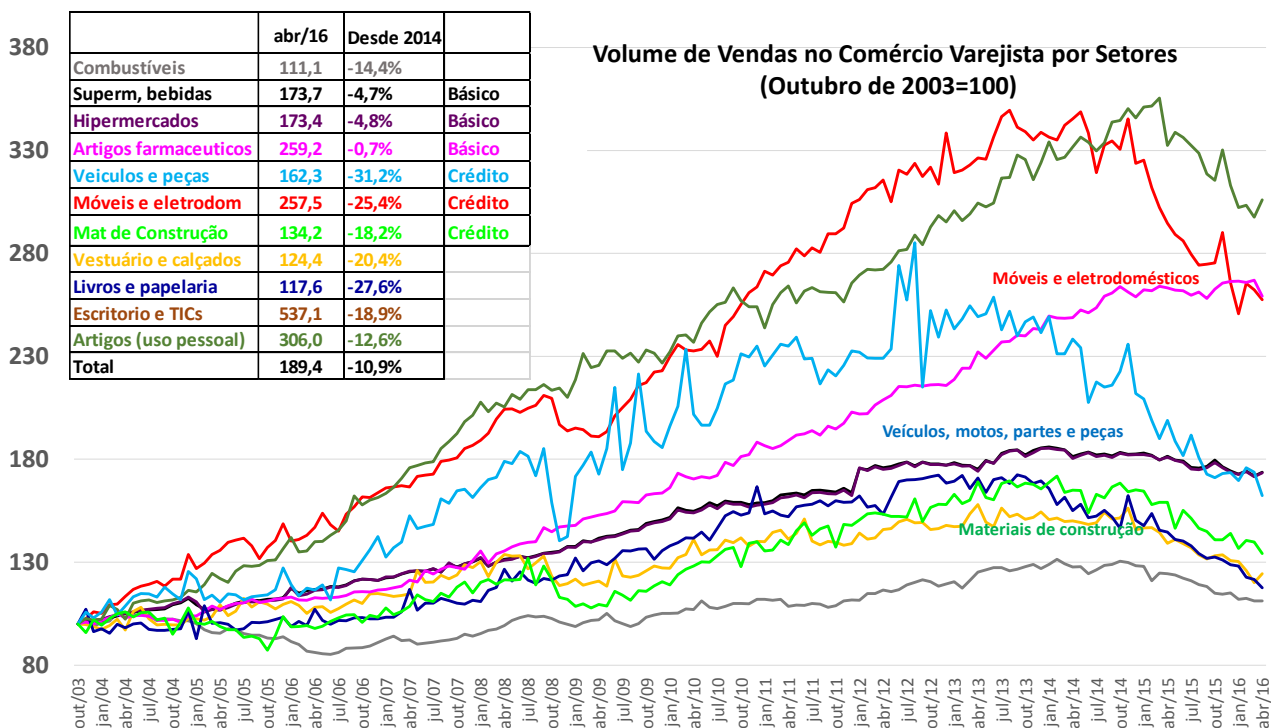
1ª vez que adquiriu o bem ou serviço: Entre os que compraram



*considera apenas quem adquiriu o bem ou serviço nos últimos 3 anos

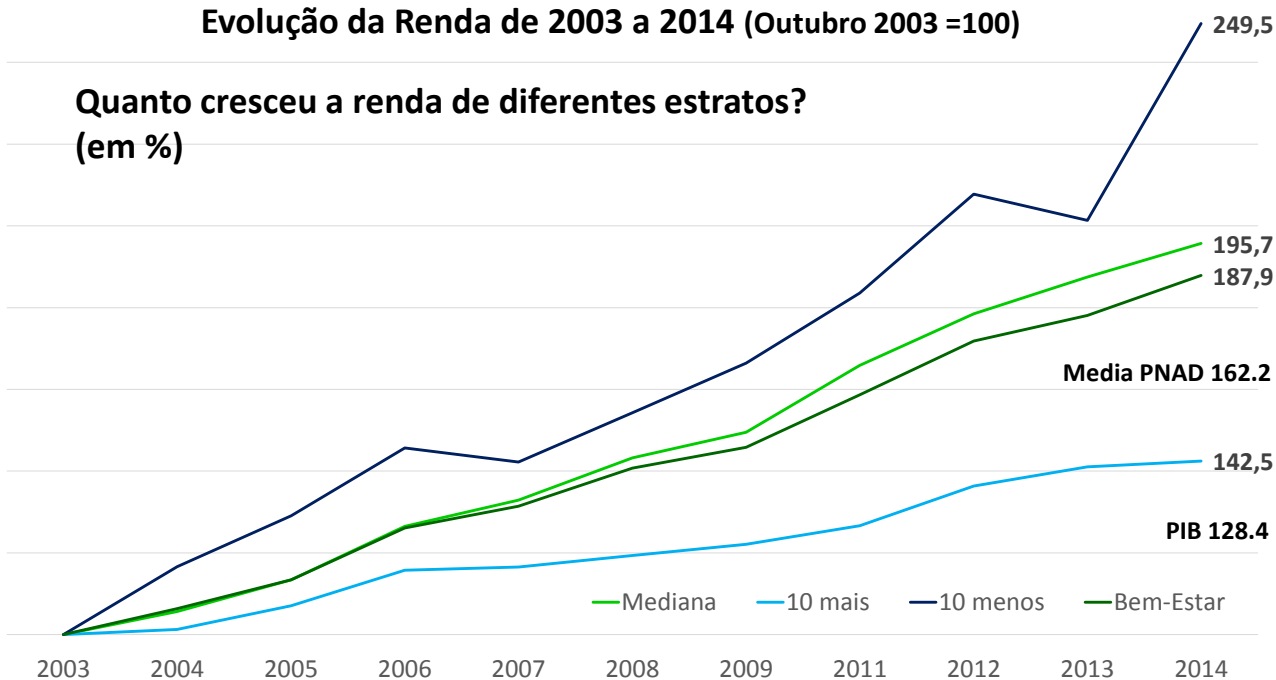
Fonte: questões propostas pela SAE para SECOM – Pesquisa trimestral de opinião pública – Julho/2014



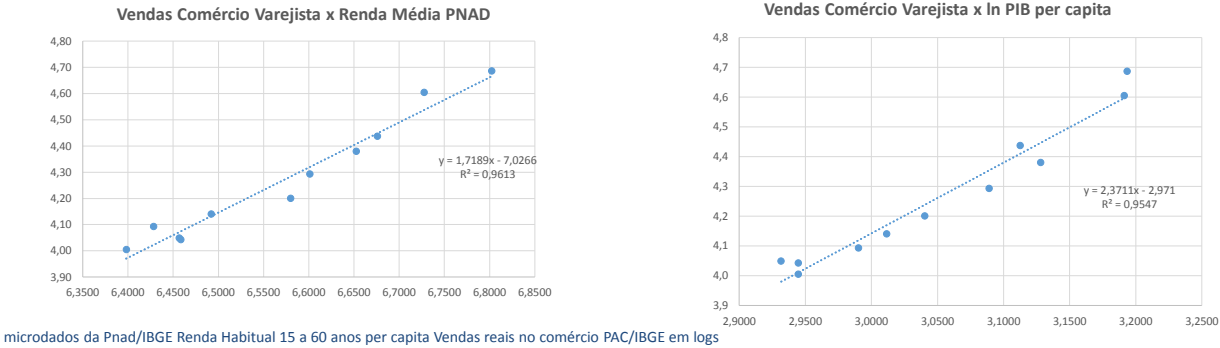


Evolução da Renda de 2003 a 2014 (Outubro 2003 =100)

Quanto cresceu a renda de diferentes estratos?
(em %)



O que Explica as Vendas do Comércio? PIB ou PNAD?



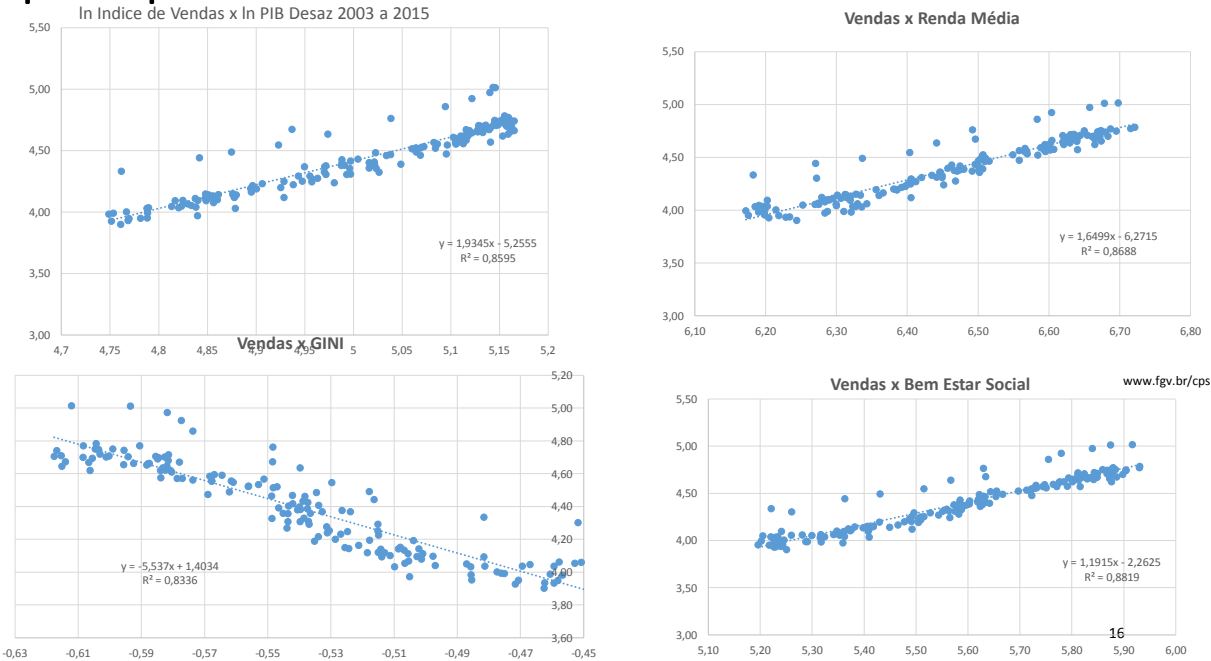
Qual é a capacidade de prever o faturamento? Entre o PIB e a Renda das pesquisas domiciliares tem vantagem na média, enxergam a desigualdade e são mais ágeis (PNAD, PNADC e PME - anuais, trimestrais e mensais). www.fgv.br/cps

Crescimento e Equidade, os dois componentes mais básicos do Bem-Estar Social, são determinantes fundamentais das vendas. Nesses setores: **o altruísmo compensa!**

15

O que Explica as Vendas do Comércio?

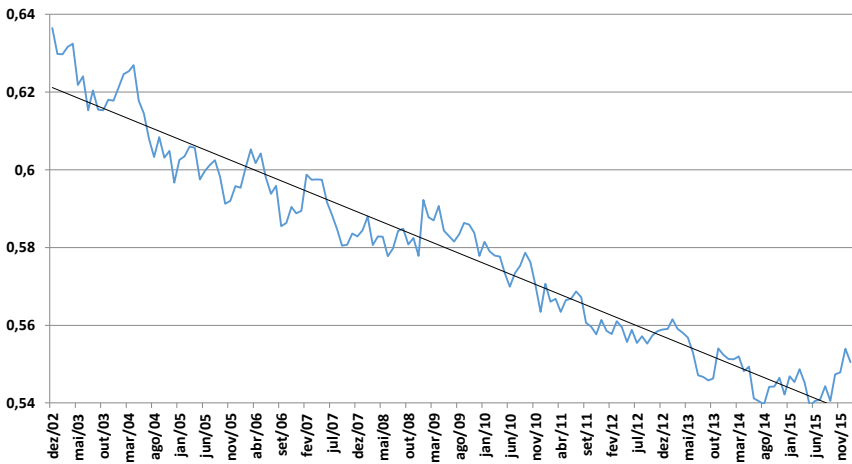
microdados da PME/IBGE Renda Habitual 15 a 60 anos per capita Vendas reais no comércio PMC/IBGE em logs



Earnings Inequality *Has labor income inequality gone up?*

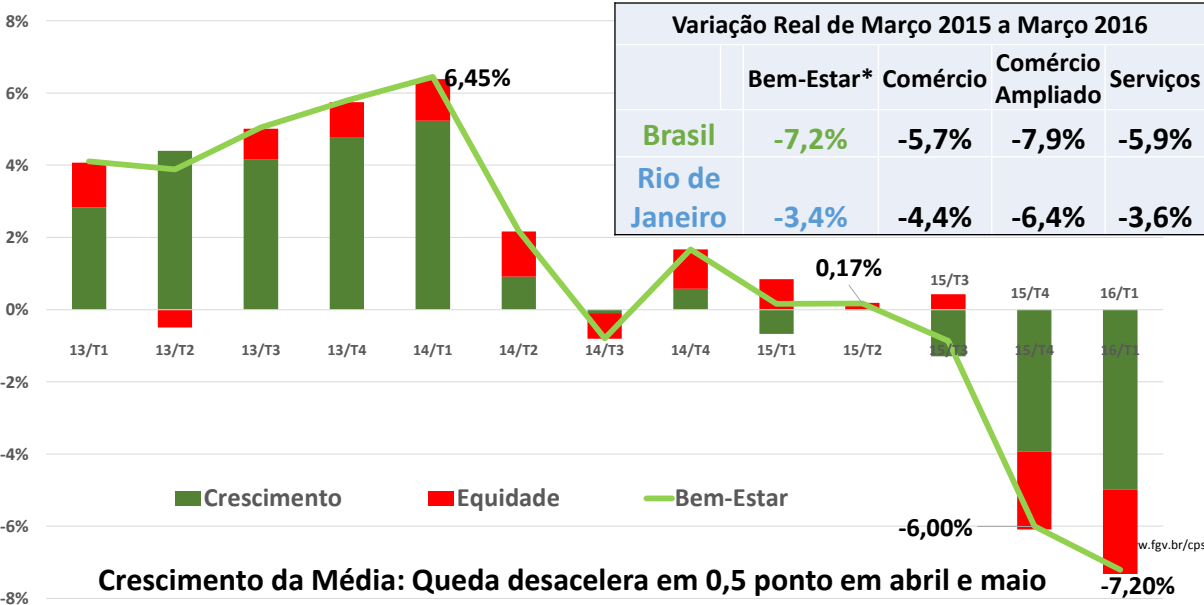
*GINI of Per Capita Labor Income**

Inequality Index, December 2002 to February 2016



Source: FGV Social from PME/IBGE (2002-2014) microdata
*Per Capita Household Labor Income - 15 to 65 Years

Crescimento, Equidade e Bem-Estar Social Trabalhistas
- Taxas de Crescimento 12 meses

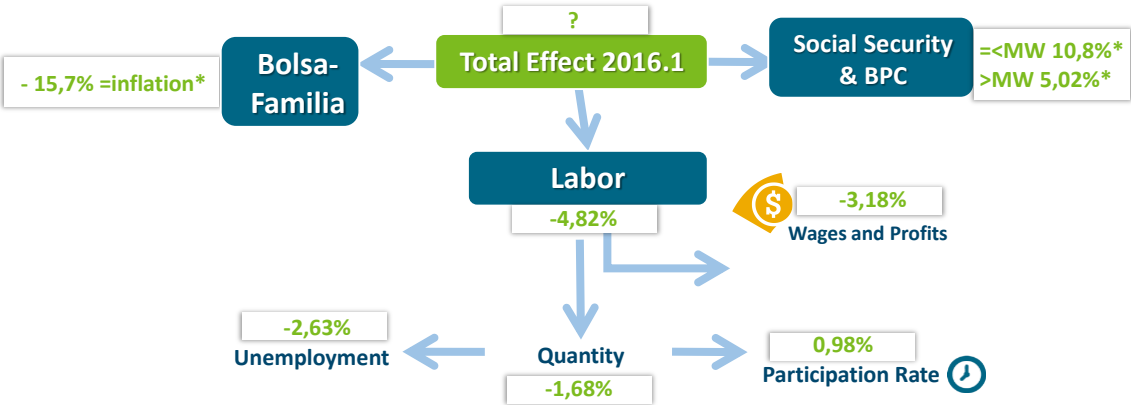


What happened after 2014? (and Why?)

Inflation, Unemployment and Informality
Up to 2016 (first quarter) Cumulative change
Seasonality affects here
*OBS: * factors for Rio Municipality,*

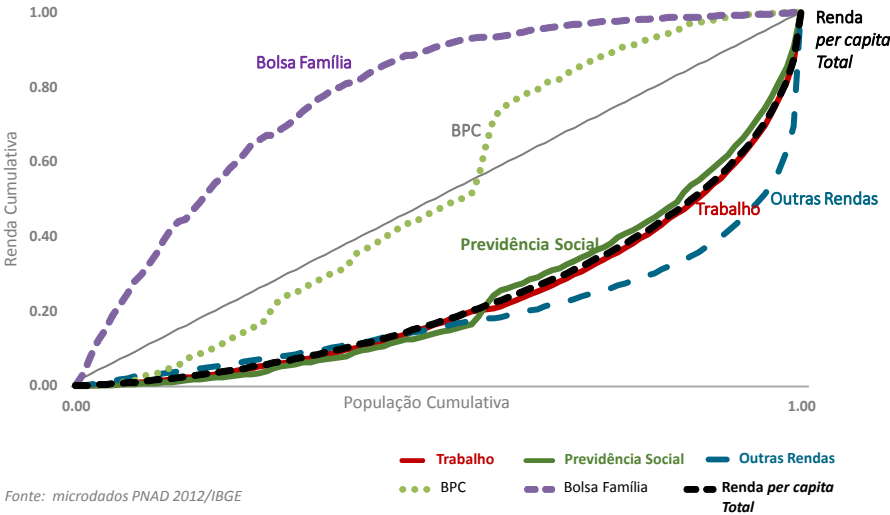
Impacto Final	Crescimento Real	
Rio de Janeiro	2014 - 2016.I	
Fontes de Renda:	Município	Periferia
Trabalho	13,08%	2,16%
Previdência e BPC	8,67%	9,68%
Bolsa Família	-14,85%	-21,66%
Outras Privadas	12,91%	2,81%
Total	11,76%	3,47%

<http://www.cps.fgv.br/cps/bd/pnad/MunicRJNEW/modelopan/NEW.htm>



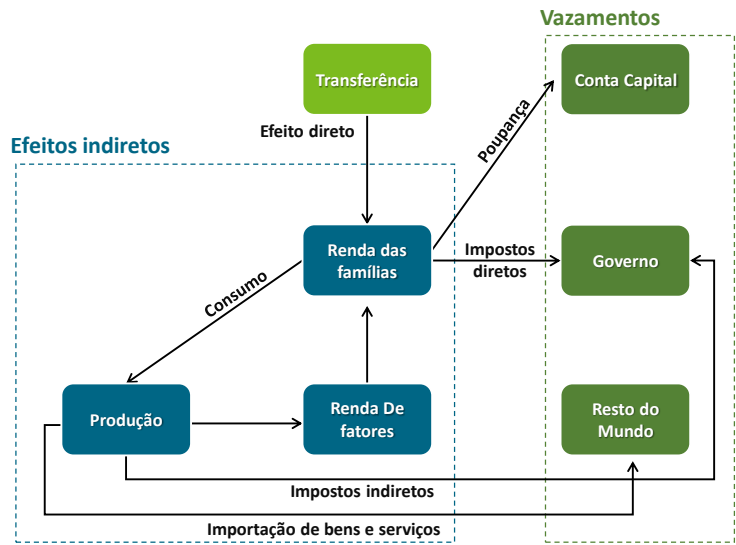
Impacto das Transferências sobre a Desigualdade de Renda

A curva de concentração do Bolsa Família difere das demais fontes de Renda
= Cada R\$ gera mais Igualdade (370% mais forte no Gini que previdencia) *Equidade*



Prosperidade

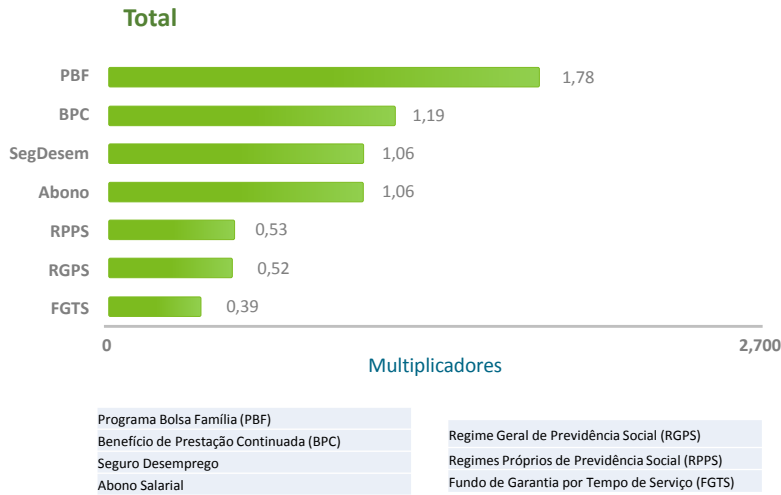
Matriz de Contabilidade Social e o Fluxo Circular da Renda obtido com a expansão de uma transferência monetária



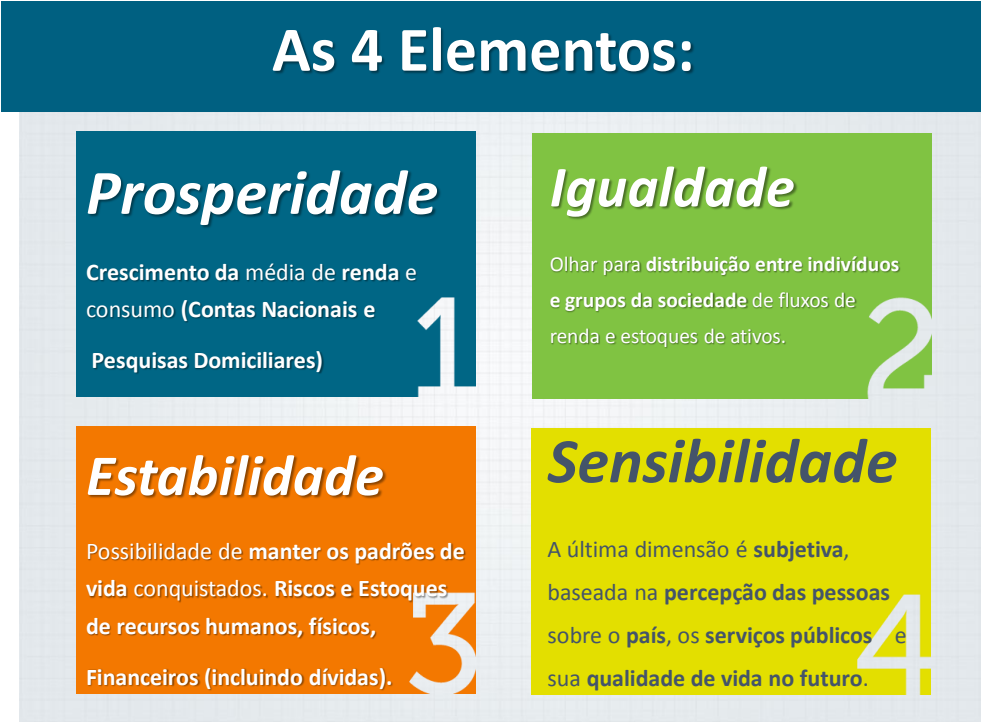
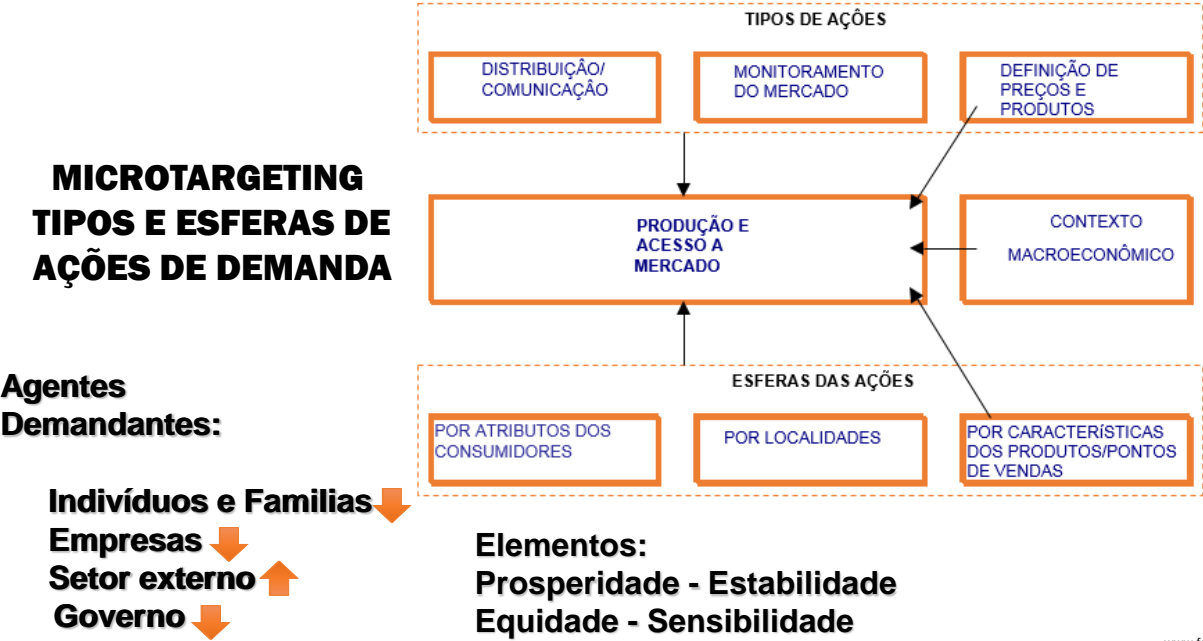
Prosperidade

Efeitos multiplicadores das transferências sociais sobre:

PRODUTO INTERNO BRUTO

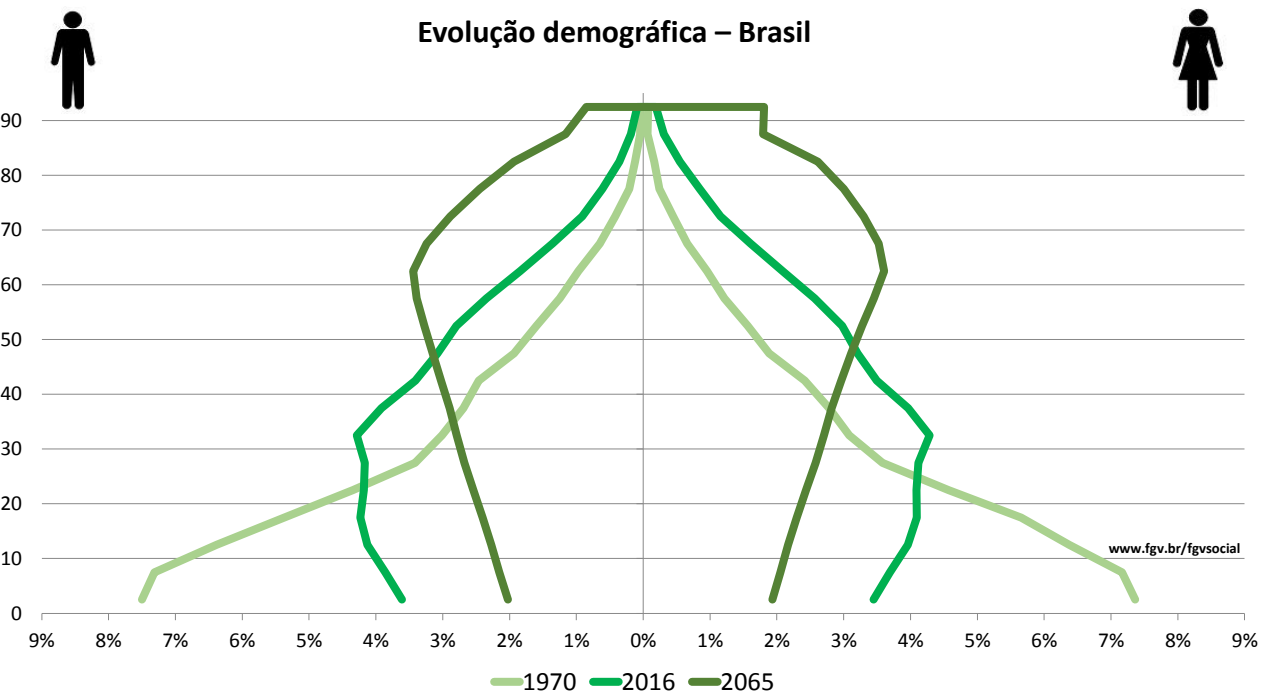


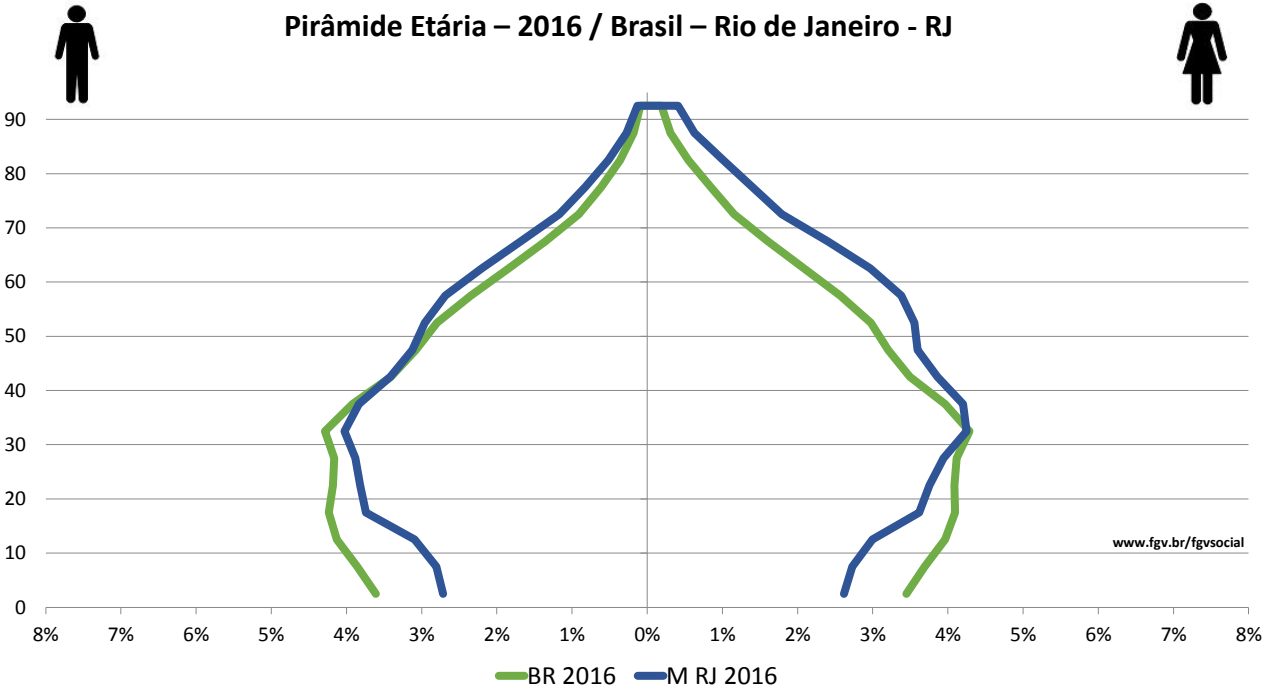
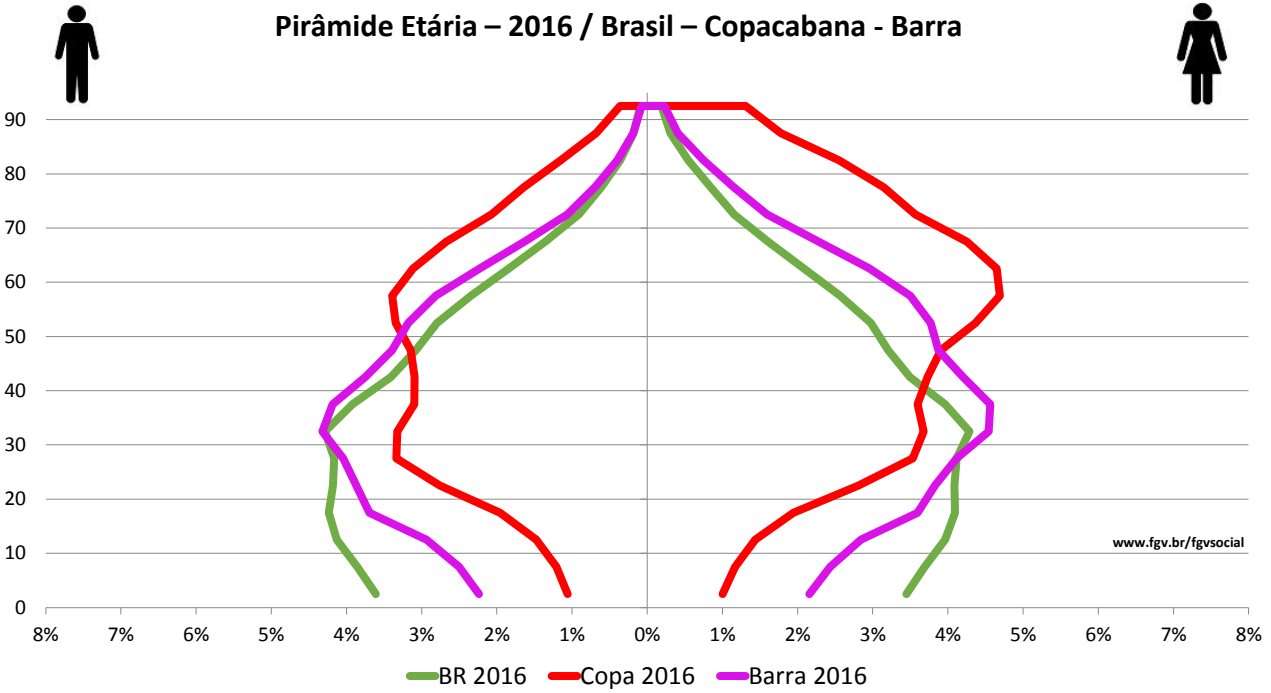
Fonte: Neri, Vaz e Ferreira (2013) a partir da MCS de 2009

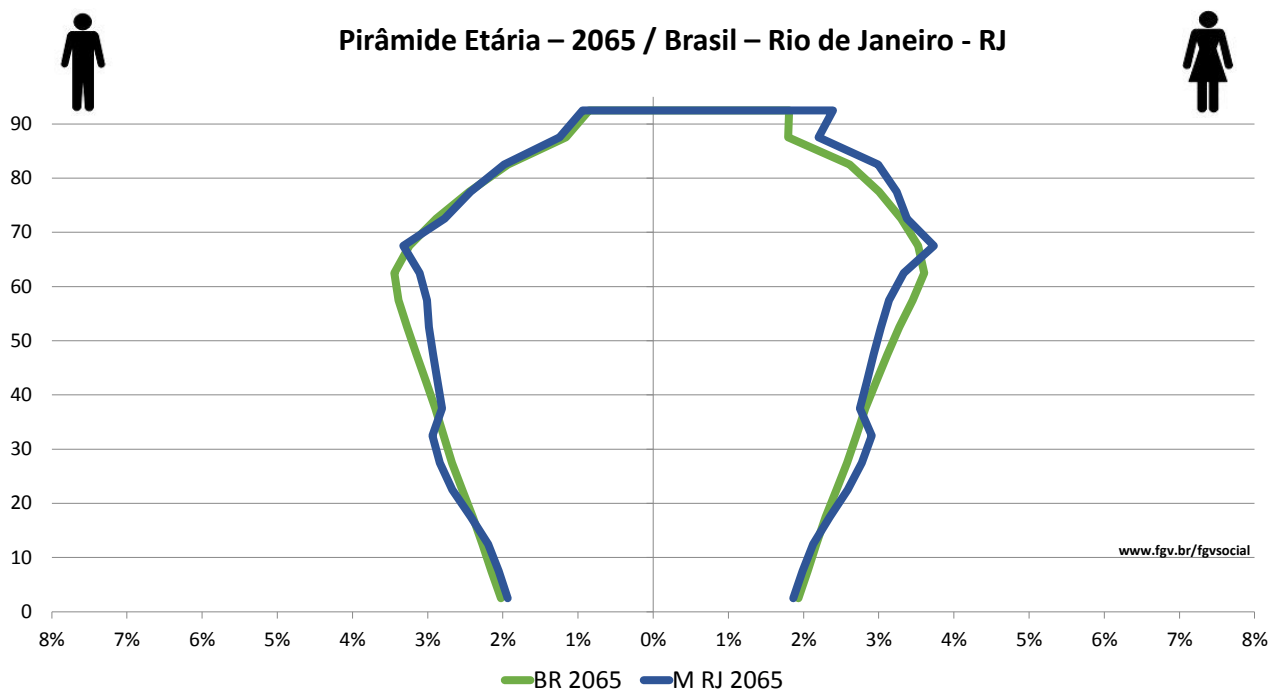


Health and GSK related Issues

- do more,
 - feel better,
 - live longer
-
- Doctors







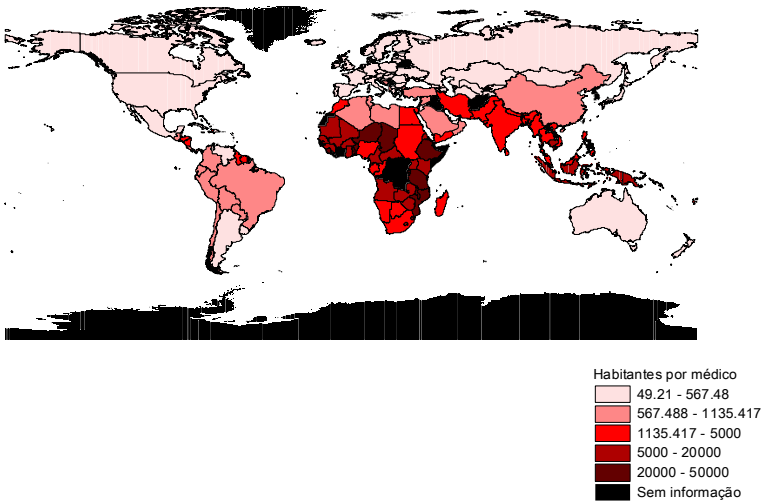
Escassez de Médicos

Ranking Multivariado de Carreiras Universitárias e Mercado de Trabalho*

		Salário *		Jornada Hr		Ocupação Taxa (%)		Cobertura Previ Taxa (%)	
		R\$ mensais	Rank	Sem	Rank		Rank		Rank
1	MEDICINA	8459,45	1	41,94	41	97,07	1	93,38	5
2	ODONTOLOGIA	5367,31	7	38,24	14	96,22	2	83,23	43
3	SERVIÇOS DE TRANSPORTES	6052,56	3	38,90	17	93,56	14	93,25	6
4	ENGENHARIA CIVIL	5768,19	5	42,12	44	95,72	3	90,68	28
.....									
45	TURISMO, VIAGENS E LAZER	3043,14	36	41,25	32	90,70	43	87,18	34
46	EDUCAÇÃO FÍSICA e ESPORTES	2786,31	42	38,75	15	89,74	47	86,24	37
47	FILOSOFIA E ÉTICA	2340,35	47	37,33	7	89,17	48	86,97	35
48	RELIGIÃO	2175,79	48	39,43	21	89,94	46	78,89	46

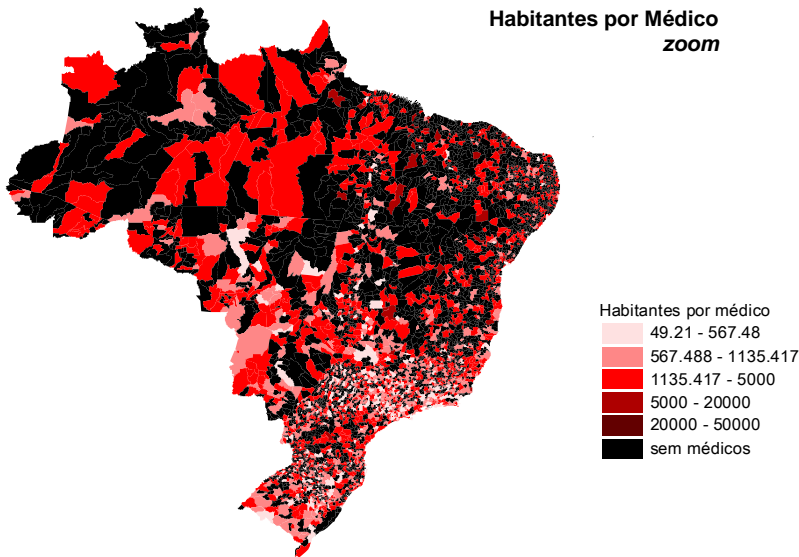
<http://www.cps.fgv.br/cps/bd/educ/simula/index.htm>

Habitants per Doctor
zoom

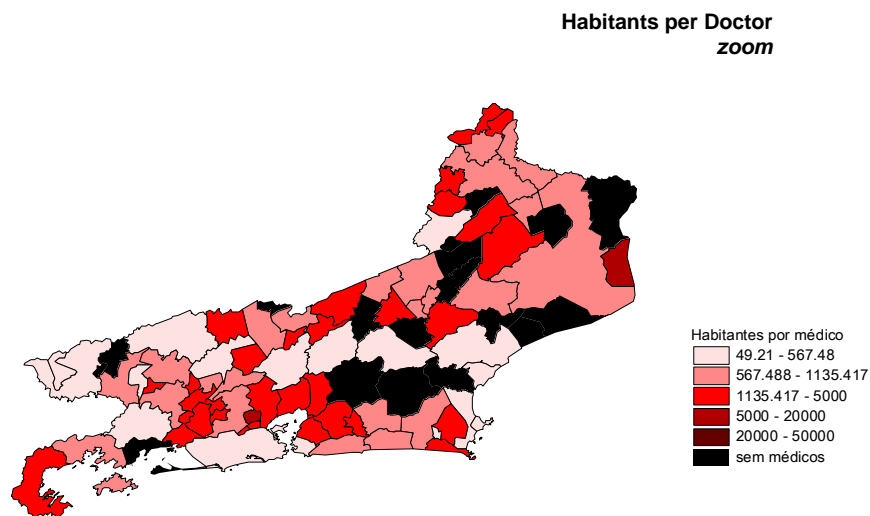


Source: CPS/FGV

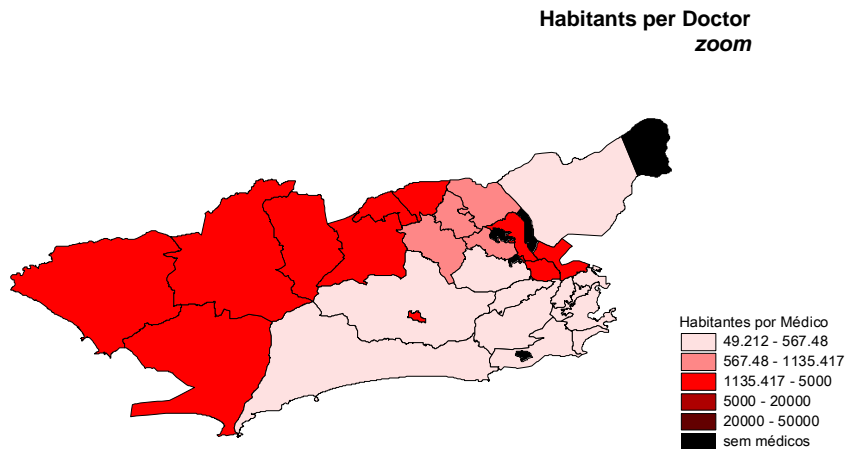
Habitantes por Médico
zoom



Source: CPS/FGV processing microdata from Censo 2000/IBGE



Source: CPS/FGV processing microdata from Censo 2000/IBGE



Source: CPS/FGV processing microdata from Censo 2000/IBGE

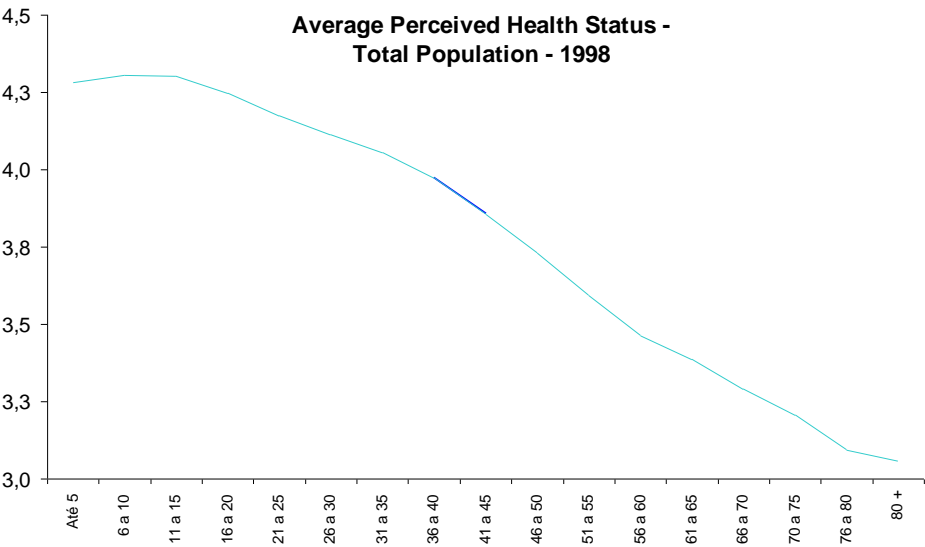
Médicos por 100 Mil Habitantes (PIA)

1	Niterói*	1274,12
2	Vitória*	1216,27
3	Porto Alegre	825,13
4	Vassouras	761,57
5	Camboriú*	736,67
6	Porto União	707,71
7	Santos*	695,68
8	Florianópolis*	686,42
9	Ribeirão Preto	667,57
10	E Rios do Sul	631,99

RANKING Classe A1 (Renda Familiar> R\$ 15000)

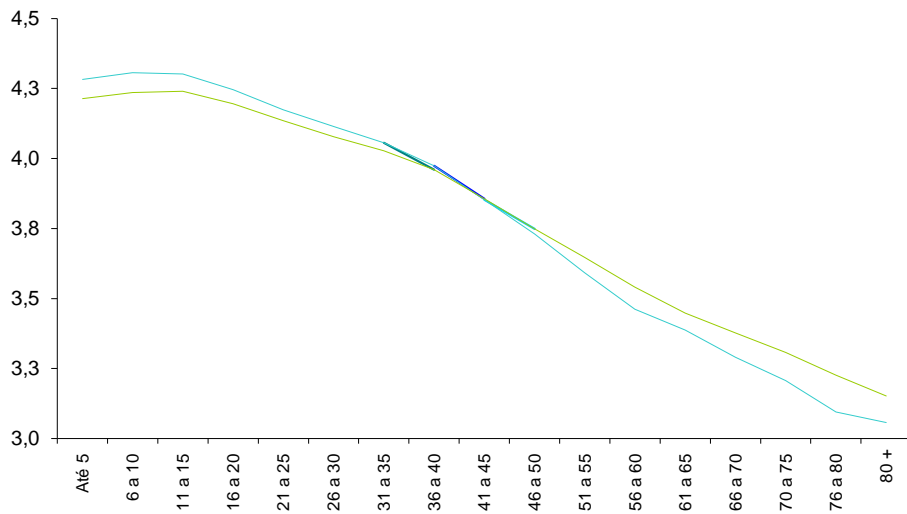
Rank	Município	Estado	A1 %
1	Niterói	RJ	17.61%
2	Santana de Parnaíba	SP	16.515%
3	Vitória	ES	15.06%
4	Florianópolis	SC	14.90%
5	São Caetano do S	SP	14.75%
6	Brasília	DF	14.01%
7	Porto Alegre	RS	13.24%
8	Nova Lima	MG	11.64%
9	Santos	SP	11.13%
10	Camboriú	SC	10.76%

Fonte: microdados do Censo2010/IBGE



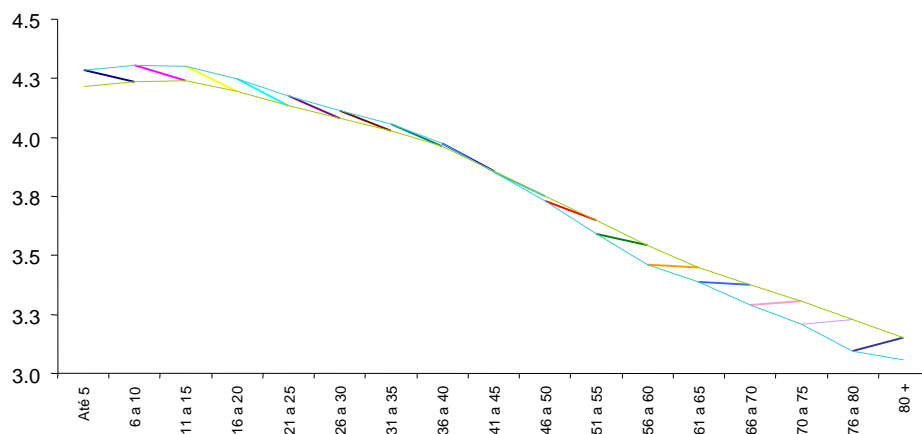
Source: CPS/FGV based on the special supplement of PNAD 1998 / IBGE

Average Perceived Health Status 1998 and 2003

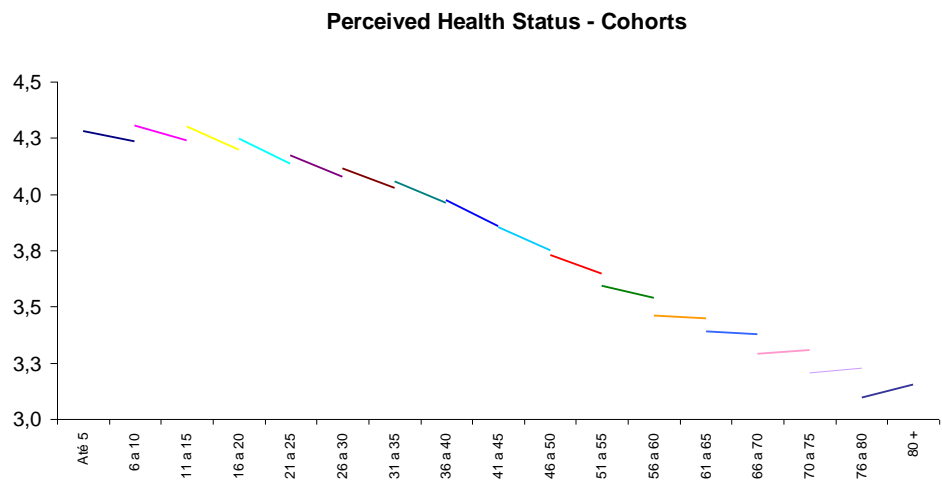


Source: CPS/FGV based on the special supplements of PNAD 1998 and 2003/ IBGE

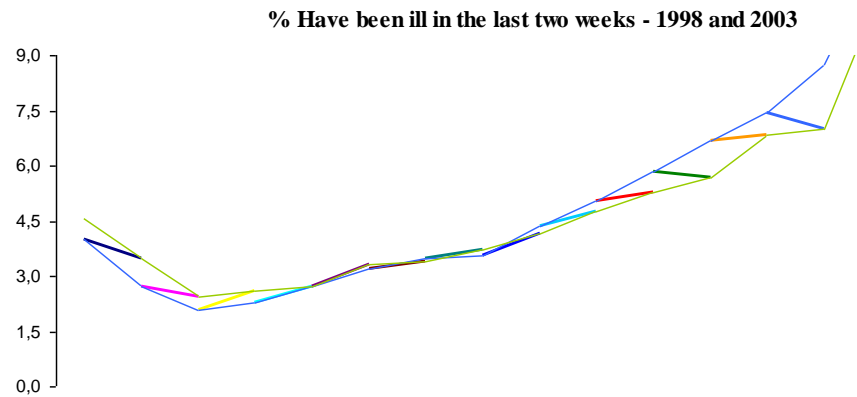
Perceived Health Status 1998, 2003 and Cohorts



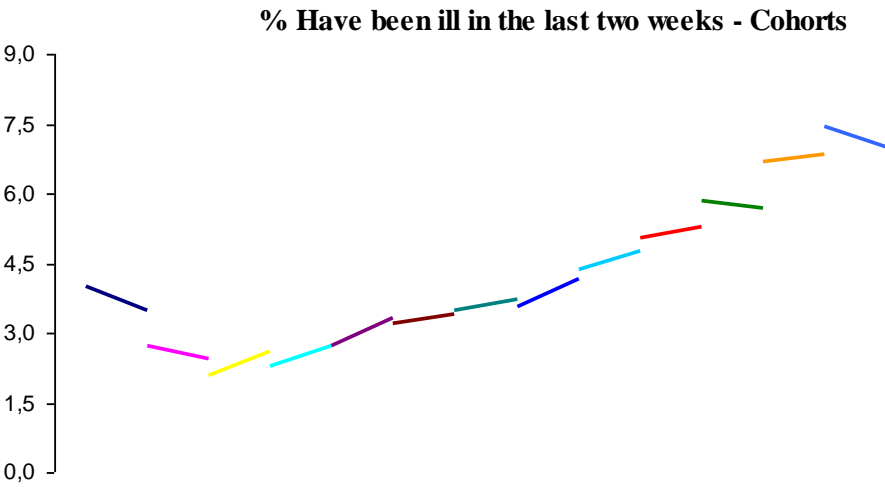
Source: CPS/FGV based on the special supplements of PNAD 1998 and 2003/ IBGE



Source: CPS/FGV based on the special supplements of PNAD 1998 and 2003 / IBGE

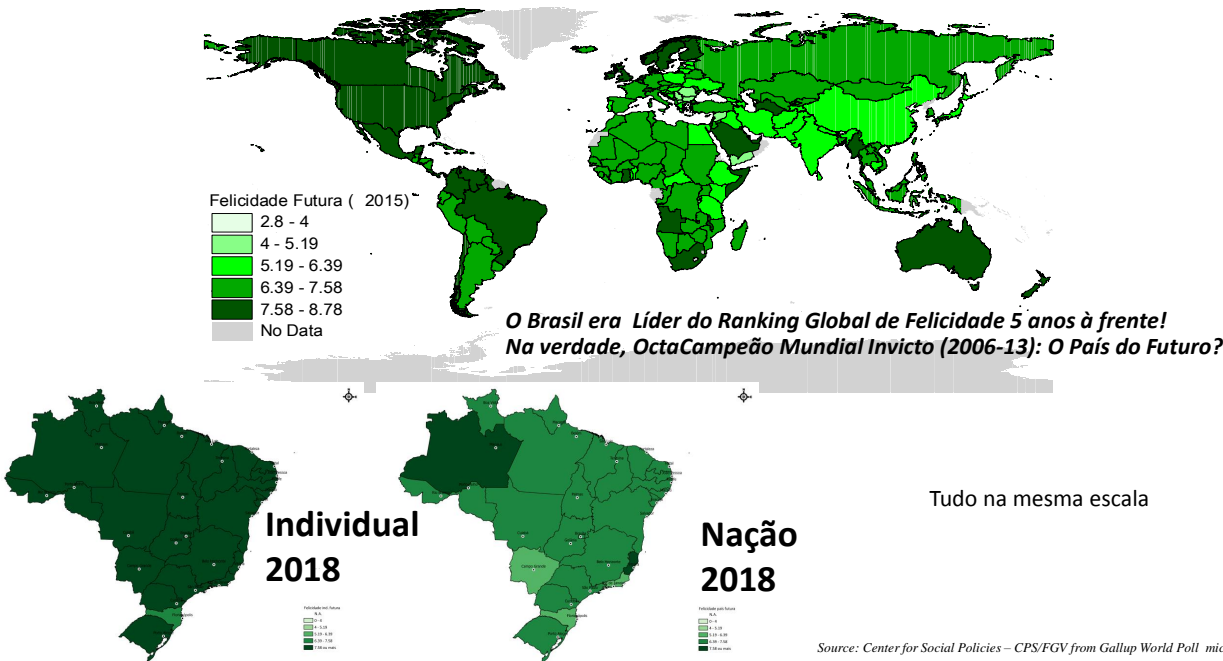


Source: CPS/FGV based on the special supplements of PNAD 1998 and 2003 / IBGE



Source: CPS/FGV based on the special supplements of PNAD 1998 and 2003 / IBGE

Felicidade Futura-Satisfação com a Vida em 5 Anos



Source: Center for Social Policies – CPS/FGV from Gallup World Poll microdata

Satisfação com a Vida em 5 Anos – Indivíduo e o País



<http://www.cps.fgv.br/cps/bd/ncm2014/IndiceFelicidade/index.htm>

Source: Center for Social Policies – CPS/FGV from Gallup World Poll microdata

Algumas Referências: www.fgv.br/cps



Obrigado!

Slides e Vídeo da Palestra em

<http://cps.fgv.br/gsk>