

Latin America Telecommunication Industry Report, 2008



Telecom reform started up in Latin America in 1980s and has been privatized gradually. So far, most telecom markets in Latin American countries have been open to the outside and privatized, yet privatization face strong opposition in some nations. Private investment conduces to the fast growth of mobile and long-distance call, but causes the stay of fixed line density growth (currently at about 18% in the entire Latin America).

Mobile subscribers in 19 Latin American countries (Argentina, Bolivia, Brazil, Chile, Costa Rica, Colombia, Cuba, Salvador, Ecuador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Dominica, Venezuela, and Uruguay) registered 444 million in 2008, with a penetration rate of around 78%.

Key Mobile Telecommunication Businesses in Latin America, 2005-2008

	2005	2006	2007	2008		
	million	million	million	million	Growth rate	Share
América Móvil	117	115	144	172	19.10%	38.60%
Telefonica	69	83	102	123	21.00%	27.80%
Tim	28	36	45	51	12.90%	11.40%
Oi	10	13	16	24	52.40%	5.50%
Millicom	4	9	15	19	24.30%	4.20%
Cantv	5	8	10	-	-	-
Entel Chile	4	5	6	6	0.02%	1.40%
Others	9	29	23	49	114.10%	11.10%
Total	247	299	359	444	23.70%	100%

Source: Teleco

During 2003 to 2007, Latin American broadband market saw a CAGR of 54%. And the market leaders were Brazil, Mexico, Argentina, Colombia, and Chile. In early 2008, the broadband subscribers of the above five countries accounted for 85% of Latin America's.

Historically, Latin America consists mainly of Spanish- and Portuguese-speaking countries, which is favorable to the business promotion of European telecom giants in Latin America. Statistically, 77.8% of mobile business market in 2008 was seized by America Mobil, Telefonica, and Telecom Italia, wherein, America Mobil, being Latin America's largest operator, boasted of 172 million mobile subscribers in 2008 accounting for 38.6% of total users.

The report expounds the development of telecom markets (excluding Brazil) in Latin America and the key business and operation data of main telecom operators. The research on Brazil telecom market can be referred to ResearchInChina's Brazil Telecommunication Industry Report, 2008.

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