

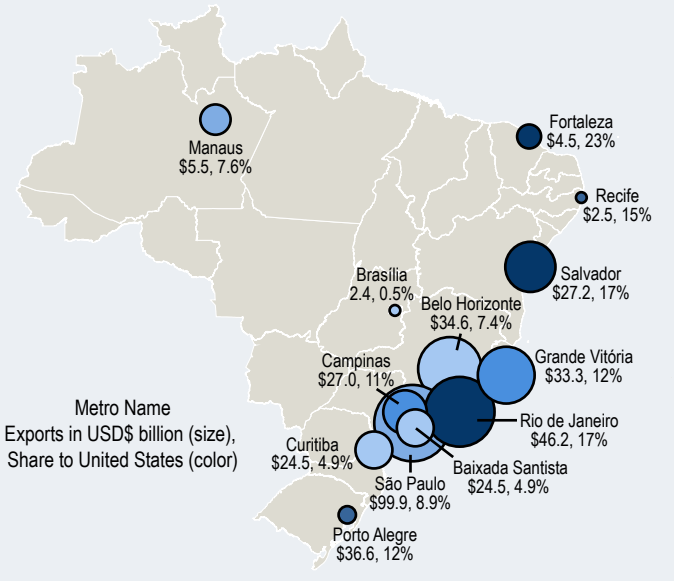
METRO BRAZIL: Overview

An analysis of data from the Brazilian Institute of Geography and Statistics (IBGE), the Ministry of Development, Industry, and Foreign Trade (MDIC), and Oxford Economics for Brazil and its 13 largest metropolitan economies over the past two decades reveals that:

**Thirteen Brazilian metropolitan areas rank among the world’s 300 largest metropolitan economies. They are home to 33 percent of Brazil’s population but account for 56 percent of national GDP.** Together, they concentrate half of Brazil’s population with tertiary (college) education. Eleven of these large metro areas are federal or state capitals, and they are important drivers of their states’ economies and population growth. In the ten states represented by these metro areas, at least 45 percent of state GDP comes from these large metro areas, and in eight of the ten states, they account for at least

Metropolitan Area	Population, 2012	GDP (millions), 2012	Industrial Specialization
São Paulo	19,953,698	\$ 472,984	Financial Services
Rio de Janeiro	11,968,886	\$ 194,875	Mining
Brasília	3,848,181	\$ 139,209	Public Services
Belo Horizonte	5,504,729	\$ 94,895	Utilities
Porto Alegre	3,986,917	\$ 74,834	Transportation Services
Curitiba	3,232,490	\$ 65,148	Transportation Services
Campinas	2,870,288	\$ 61,487	Manufacturing
Salvador	3,644,194	\$ 54,624	Construction
Recife	3,737,711	\$ 36,494	Utilities
Grande Vitória	1,727,168	\$ 33,783	Mining
Fortaleza	3,707,761	\$ 31,104	Utilities
Manaus	2,186,869	\$ 31,031	Manufacturing
Baixada Santista	1,694,790	\$ 28,423	Financial Services
Brazil	194,075,457	\$ 2,363,718	
Top 13 metros share of nation	35%	56%	

Map 1. Exported Goods by Metropolitan Area, 2007-2012



half of GDP. Manaus and Rio de Janeiro stand out for their share of state GDP, 88 and 74 percent, respectively. And Brasília, though not part of a state, accounts for a share of national GDP (6 percent) three times its share of national population (2 percent).

**Residents of Brazil’s largest metro areas are more likely to be of working age than the Brazilian population on the whole; these metro areas also house nearly two-thirds of the nation’s foreign-born population.** Sixty-six (66) percent of residents in Brazil’s largest metro areas are between age 18 and 65, compared to 63 percent nationally. Immigrants make up a small share (0.6 percent) of their residents, but together the 13 metro areas are home to 65 percent of immigrants in Brazil, twice their share of national population. Portugal, Japan, and Paraguay are the birthplaces of the largest number of immigrants. The 13 metro areas are also departure points for emigrants from Brazil, sending 39 percent of Brazilians who move abroad.

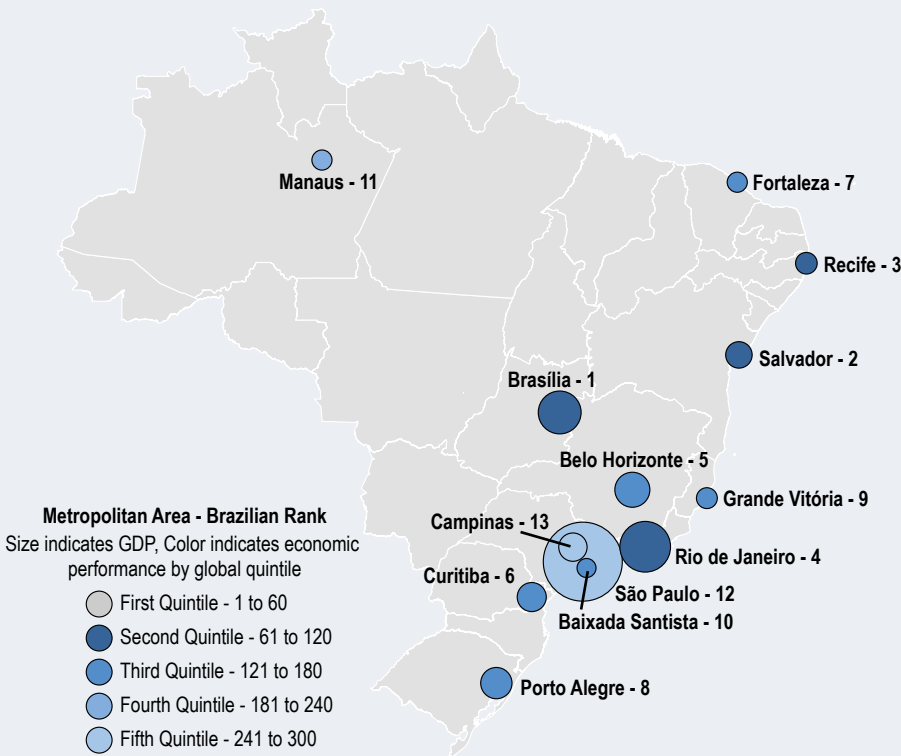
**In each of the 13 large metro areas, employment grew faster than the national average (37 percent) from 1990 to 2012. Nine metro areas exceeded Brazil’s GDP growth rate (91 percent) over the same period.** Manaus and Brasília more than doubled their employment over the two decades, while the 13 metro

areas together accounted for 36 percent of all employment growth in Brazil. Over that period, GDP in Campinas, Curitiba, Fortaleza, Baixada Santista, Grande Vitória, Brasília, and Manaus more than doubled, while GDP growth in Porto Alegre, Rio de Janeiro, São Paulo, and Salvador lagged the national average. Since 1990, São Paulo and Rio de Janeiro’s contributions to national GDP have declined by 1.8 percent and 1.4 percent respectively, while the other 11 metro areas’ GDP shares have remained stable.

**Large metro areas are responsible for one-third of all exports from Brazil, including one-third of exports to the United States.** Between 2007 and 2012, Brazil’s 13 largest metro economies exported \$369 billion worth of merchandise goods, 11 percent of which (\$39 billion) went to the United States. Similarly, these metros were responsible for 34 percent of all exported goods sent to the United States. São Paulo is Brazil’s largest metropolitan exporter and represents 27 percent of all metropolitan exports, while Recife and Brasília both contribute less than 1 percent of total metropolitan exports. In addition to São Paulo, Rio de Janeiro and Salvador were large senders of goods (in both volume and share) to the United States (Map 1).

**In 2011-2012, employment grew faster than the national average in 10 of the 13 large metro areas, while GDP per capita grew faster in seven.** In the context of slowed economic growth at the national level, Brazil’s metro areas continued to differ in their own economic performance. Brazil’s employment grew 1.4 percent in the past year; only in Baixada Santista, Campinas, and Sao Paulo did it grow more slowly. Salvador’s growth rate (2.7 percent) nearly doubled the national average. GDP per capita in Brazil increased by a very modest 0.5 percent from 2011 to 2012, to \$12,179. Seven of the 13 metro areas exceeded this growth rate, topped by Brasília (1.6 percent), while GDP per capita declined in four metro areas. Despite this rocky performance, GDP per capita was higher than the national average of \$12,179 in all but two metro areas: Fortaleza and Recife. Brazilian metropolitan areas specializing in public services (Brasília) and construction (Salvador) experienced the strongest economic performances in 2011–2012. Metropolitan areas specializing in financial services and manufacturing ranked lowest on the 2011–2012 economic performance

Map 2. Economic Performance by Metropolitan Area, 2011-2012



index (Baixada Santista, Manaus, São Paulo, and Campinas). The remaining metro areas, which specialize in utilities, transportation services, or mining ranked between third and ninth on economic performance.

**Among the 300 largest global metropolitan areas, Brazil’s large metro areas span a wide range for their short-term economic performance.** On an economic performance index that combines employment growth and GDP per capita change in global metro areas, Brasília ranks highest among the 13 largest Brazilian metro areas at 66 out of 300, while Campinas ranks lowest at 253.<sup>1</sup> In total, four Brazilian metro areas rank in the second highest quintile of the index, six in the middle quintile, two in the second-lowest quintile, and one in the lowest quintile (Map 2).