



LATIN AMERICAN GAMING AND GAMBLING 2007

A new Report on all aspects of off-line and on-line gaming and gambling in Latin America

South and Latin American Gambling Markets - LATIN AMERICAN GAMING AND GAMBLING 2007 (published by Divine Works Ltd)

London, October 2007

Summary

The gambling markets in South and Latin America have so far largely been uncharted territory on the strategic maps of many global gambling companies. But as the global market environments and regulations change rapidly, more and more eyes (e.g., Internet gambling heavyweight Bwin in Argentina and Mexico) also turn to alternative gambling markets beyond the traditional key markets in the US and Europe.

The South and Latin American region has 33 countries with a total population of circa 550 million, and the market of both legal and illegal gambling is estimated at circa USD 80 billion to USD 100 billion a year.

Brazil, Mexico, Argentina, Chile, Costa Rica, Colombia, Peru, and Venezuela are considered the most prolific gambling countries in the region where slot machines, casinos, horse race betting, lotteries, bingo, Internet gambling entertain millions of people each day. Argentina's gambling industry generates USD 4.2 billion a year whereas Brazil has the largest lottery and bingo market in the region and the main lottery is estimated to generate sales of nearly USD 3 billion for 2007.

This report published by Divine Works (MECN acts as re-seller) was researched between Q1 2005 and Q2 2007 and offers a comprehensive country-by-country analysis, including:

- **Country Overview:** The report covers detailed information relevant to the gaming and gambling opportunities offered in Argentina, Brazil, Chile, Colombia, Costa Rica, Mexico, Peru and Venezuela.
- **The Gambling Market:** With an overview of each country's gambling market and size and specific gambling activities as well as sectors broken down into casinos, lotteries, bingos, betting and Internet gambling.
- **Gambling Advertising:** With a comprehensive study of all advertising regulations affecting the gaming and gambling industry in each country including advertising examples.
- **Gambling Legal Framework:** With a detailed explanation of the current legislations in the industry, its key regulating bodies and associations as well as the gaming taxes imposed.
- **Country Infrastructure:** With information on relevant infrastructures for the gaming and gambling industry such as tourism, communications, foreign investment and payments.

Sample pages of report

NATIONAL LOTTERY GAMES	2006	2005
La Quilera	\$491,356,870	\$607,814,880
La Quilera Focaccia	\$26,744,130	\$21,814,150
Loto Desquite S&G	\$77,542,036	\$76,188,693
Loto 5	\$1,009,482	\$4,815,152
Quil 6 / Seg. Revancha	\$13,715,207	\$40,713,036
Bingo	\$1,019,482	\$3,707,462
La Solidaria	\$4,415,044	\$4,028,662
Teléfono	\$16,013,031	\$1,045,024
Toto Bingo	\$344,306,032	\$207,308,402
Mirón Bingo	\$1,160,310	\$774,371
TFM Bingo	\$4,911,535	\$2,473,188
TOTAL	\$462,621,832	\$1,061,614,383

Source: Pro Nacional Lottery Statistics

NAME OF LOTTERY	DETAILS
Lotería Nacional	Santiago de Chile 135 Ciudad Buenos Aires. Tel: +54 (0) 11 4350-4100 www.loterianacional.gov.ar
Lotería de la Provincia de Buenos Aires	Calle 40 Nº 581 - La Plata Tel: +54 (0) 21 4121-1122 www.ladep.gov.ar
Caja Aniversaria Social - Lotería de Santa Fe	Tel: +54 (0) 342 4872769 www.casasocial.gov.ar
Lotería de Río Negro	Av. 20 de Mayo y Sarmiento - En Su Av. Tucumán 5916, Viedma Río Negro. Tel: +54 802031 422746 www.loteriarionegro.gov.ar
Lotería de la Provincia de Córdoba S.E.	www.loteriacordoba.gov.ar
S.N.A.S.A. - Lotería de Salta	Avenida 201 - Salta - Salta Tel: +54 80307 4310880
Cajapas Argentina S.A. - Lotería La Solidaria	Morone 1380, Ciudad de Buenos Aires, Tel: +54(0) 11 4398-0400 www.loteriasolidaria.com

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KEY BODIES & ASSOCIATIONS

MEDIA-WIDE	DETAILS
Asociación de Loterías, Quileras y Casinos Argentinos (A.L.Q.A.)	27 de Abril 202 1º Piso Of. 14 - Edificio Mercedes B-Córdoba - Córdoba Tel: +54 (0) 351 421010 / 4236767 / 4216076 www.alqa.com.ar
Caseros Argentinos Industrias Juego de Azar (C.A.I.J.A.)	Tel: +54-11 4086-2054 http://www.caj.com
NATIONAL	DETAILS
Administración General de Juegos de Azar (A.G.J.A.)	Belgrano 50, La Plata - La Plata Tel: +54 (0) 222 450669
Asociación de Agencias de Lotería, Bingo, Casinos de Santa Fe y Zona	Comodoro 510, Santa Fe - Buenos Aires Tel: +54 (0) 333 6540763
Asociación de Agencias Oficiales de Lotería Provincia de Entre Ríos	Av. Ramirez 1854, Paraná - Entre Ríos Tel: +54 (0) 3462 6213492
Asociación de Agencias Oficiales de Quilera y Lotería Corrientes	Corrientes Pellegrini 1501, Corrientes - Corrientes Tel: +54 (0) 762 43-4182
Asociación de Agencias y Sub-Agencias de Lotería Chubut	Santiago de Chile 200 Neuquén - Chaco Tel: +54 (0) 222 42-4180
Caseros de Agencias Oficiales de Lotería Nacional	H. Hoggan 1180 Pto. 2da - Ciudad de Buenos Aires Tel: +54 (0) 433 24100 8020 / 4333-2582
Caseros de Agencias de Lotería y Bingo de La Plata	Calle 19º 407 (Calle 45) 485 Local 11, La Plata - Buenos Aires Tel: +54 (0) 21 433-4289

THE GAMBLING MARKET

OVERVIEW

Argentina has one of the largest gaming markets in Latin America and its gaming tradition, especially for bingo, dates back to the 19th century. With the exception of Buenos Aires where casinos are still banned, a wide range of gaming facilities can be found throughout all provinces. These include lotteries, bingo, horse race betting, slot machines and bingo halls.

The gaming market in Argentina is continuously growing and although there are not many official statistics available, the amount of money generated in this industry is estimated to be USD 4.2 billion according to newspaper La Nación and other private and public sector companies in December 2006.

In USD 4.2 billion is generated by all lotteries, bingo, horse racing and its estimated 31,600 slot machines and 12,000 bingo halls.

Source: Divine Works

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About the authors

Divine Works Ltd

Divine Works Ltd has created a network of professionals, located across South and Latin America, who are able to provide information and insight invaluable in todays leading gambling and gaming industries. Set up in 2003, Divine Works is an experienced consultancy with numerous clients including market leaders such as SportingBet.



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London / UK
MECN GmbH
78 York Street,
London W1H 1DP
United Kingdom

Munich / Germany
MECN GmbH
Isabellastrasse 19
80798 Munich
Germany

Tel.: +44 (0) 870 432 5490
Fax.: +44 (0) 870 432 5491
info-uk@mecn.net

Tel.: +49 (0) 89 7412 0235
Fax.: +49 (0) 89 7412 0102
info-germany@mecn.net