



Global Total Household Income – Trends

Total household income value is expected to grow at annual rate of 1.4% pa in the next 10 years. The annual growth is then expected to be 1.1% pa in subsequent decade. By 2030, total Global Income value is expected to reach US\$ 59,394 Bn. It represents an increase of 29% over 20 years - up from US\$46,150 Bn in 2010.

The less affluent markets of the Middle East, China, India, and Developing Asia are expected to grow at a faster rate than the rest of the world. However, in terms of absolute increase, North America, China and Western Europe dominate - accounting for 57% of the total increase in the next decade.



*Individual country data is listed in the last section.

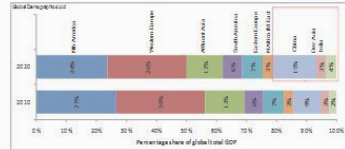
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Share of Total GDP by Region

In terms of share of total GDP, the total of the three affluent regions account 69% of global total. On the other hand, the importance of the less affluent markets will increase from 31% to 38% of total.

The share of China is expected to increase to 15% of world total GDP in 2020 (9% in 2010).



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Projected Relative GDP per capita by region

The change in GDP per capita represents different magnitudes. In the case of less affluent market, the growth rate is significantly higher.

However, for the affluent markets, a small increase in the already high GDP per capita represents a significant value.

Region	2010	2020	2030	Absolute Change	Percentage change
North America	44,639	48,534	48,869	4,225	9.5%
Western Europe	41,798	46,024	42,207	1,226	2.9%
Affluent Asia	32,042	34,897	37,016	5,074	15.8%
Western Europe	9,392	11,147	13,116	3,724	39.6%
South America	8,188	9,248	9,833	1,645	19.9%
North Africa/Middle East	6,931	7,562	6,068	631	9.1%
China	4,018	7,317	12,207	8,189	204.1%
Developing Asia	1,534	2,288	2,800	1,266	82.6%
India	1,112	1,854	2,616	1,504	135.2%

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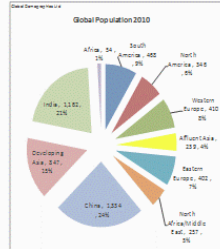
Global Total Population

Global population totals 5.52 billion in 2010.

In terms of size of population, China and India are the two largest markets in the world. Together with Developing and Affluent Asia, total Asia represents nearly 65% of the global total.

Based on projected trends in births and deaths, the global population is expected to grow at 0.7% per annum to 2020 and then increase at 0.1% pa to 2030.

Region	2010	2020	2030	% change	CAGR
Asia	3,713.4	3,957.7	4,100.0	10.8%	0.9%
China	1,312.1	1,312.1	1,312.1	0%	0%
India	1,182.2	1,312.1	1,312.1	11.0%	0.7%
Affluent Asia	247.7	247.7	247.7	0%	0%
Developing Asia	927.4	1,064.4	1,064.4	14.7%	0.6%



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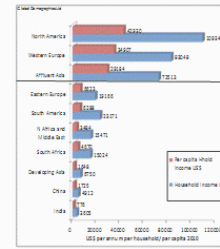
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Relative Global Household Income Per annum

Household income is an important socio-economic variable as it reflects the relative 'affordability' of each market.

The income gap between the affluent and less affluent markets is considerable. The affluent regions of North America, Affluent Asia and Western Europe, are earning over 10-20 times as much per household than the less affluent regions.



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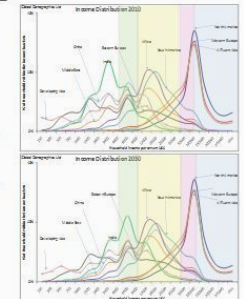


Regional Comparison – Key Segments

Before showing the changes in number of households within different income segments, it is helpful to show that other than the increase in average household income, there are also changes in income distribution over time.

When compared the distribution charts in 2010 and 2020, we can easily find that the curves tend to move towards a more normal distribution.

It is worth to note that the changes are expected to be more significant among the lower income countries.



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Per capita Income and Expenditure – North America and Western Europe

Region	2010	2020	2030	2010-2020	2020-2030	2010-2030
North America	42,850	47,819	47,776	5,000	-443	4,557
Western Europe	34,395	38,530	35,123	4,135	-3,407	728
Australia	42,811	42,871	39,806	0	-3,065	-3,065
Belgium	39,683	39,699	35,139	0	-4,560	-4,560
Germany	49,227	49,274	45,840	457	-3,434	-2,977
France	39,539	39,539	37,429	0	-2,110	-2,110
Spain	32,149	32,149	29,758	0	-2,391	-2,391
Italy	36,276	36,276	33,811	0	-2,465	-2,465
UK	39,537	39,537	36,855	0	-2,682	-2,682
Canada	37,419	37,419	37,020	0	-399	-399
Japan	36,712	37,129	37,129	417	0	417
South Korea	32,646	32,646	29,763	0	-2,883	-2,883
India	37,212	42,489	48,739	5,277	6,250	11,527
China	31,580	31,571	33,538	-9	1,967	1,958
South Africa	31,448	31,448	23,880	0	-7,568	-7,568
Spain	28,212	28,212	26,945	0	-1,267	-1,267
Sweden	38,816	38,816	35,977	0	-2,839	-2,839
Switzerland	49,217	48,711	44,879	-506	-3,832	-4,338
UK	40,142	41,790	43,026	1,648	1,236	2,884

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Total Household Expenditure – Eastern Europe

Total household expenditure value is expected to grow at annual rate of 1.8% in the next 10 years. The growth will remain at 1.1% in subsequent decade. By 2030, it is expected to reach US\$ 2.5 trillion. It represents an increase of 34% over 20 years.



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Per capita Income and Expenditure – Developing Asia

Region	2010	2020	2030	2010-2020	2020-2030	2010-2030
Indonesia	1,804	2,317	2,811	513	494	1,007
Indonesia	4,284	6,011	8,483	1,727	2,472	4,200
Malaysia	1,185	1,215	1,374	129	159	288
Philippines	1,815	1,820	2,018	1,203	1,997	3,199
Singapore	2,372	2,044	2,284	-328	240	-88
Thailand	2,528	2,524	2,524	0	0	0
Vietnam	897	876	1,154	-221	278	57
India	789	1,095	1,442	306	347	653
China	1,804	1,174	8,456	-630	7,282	6,652

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