

Brazil Information Technology Report Q1 2016

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Abstracts

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BMI View: As was the case for many regional markets, Brazilian IT demand was hurt by US dollar appreciation in 2015, but the decline in Brazil was particularly severe due to the negative impact of the commodity downturn and domestic political uncertainty. We believe the IT market contracted 16% in 2015 - and with recession forecast to extend into 2016 we expect the IT market to contract again, but at a much slower rate. After this negative shock we expect IT spending to resume on a growth trajectory from 2017 as the economy recovers and the real appreciates, supporting a CAGR of 5.1% for 2016-2019 to total IT spending of BRL109.2bn in 2019. We highlight opportunities in the enterprise markets for cost efficiency and flexibility generating solutions in the short-term during the period of economic uncertainty - and emerging technologies such as Internet of Things solutions and cloud computing over the medium term.

Latest Updates & Industry Developments

Computer Hardware Sales: BRL37.0bn in 2016 to BRL45.5bn in 2019; a CAGR of 4.2%. After a sharp contraction in demand in 2015 and 2016 the market will recover over the medium term as household purchasing power increases, and boosted by deferred purchases as confidence returns.

Software Sales: BRL20.0bn in 2016 to BRL25.1bn in 2019; a CAGR of 5.3%. Recession resulting in deferred software investments, but SaaS outperformance will continue as Brazilian enterprises look to potential cost savings as they face margin pressures.

IT Services Sales: BRL29.5bn in 2016 to BRL38.6bn in 2019, a CAGR of 6.1%. IT services forecast to continue outperforming over the medium term based on

enterprise demand for cloud services and Internet of Things solutions.

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