

Brazil Information Technology Report Q2 2016

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Abstracts

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BMI View: The Brazilian IT market was severely impacted by US dollar appreciation in 2015, but the decline in the Brazilian market specifically was severe due to the negative impact of the commodity downturn and domestic economic and political uncertainties. We estimate that the IT market contracted sharply by about 16% in 2015 - and with recession forecast to extend into 2016, we expect that the IT market will contract again in 2016 but at a much slower rate. Our forecast envisions the negative shocks to ease by 2017 when the IT market begins to return to growth trajectory as the economy recovers and the real appreciates. We forecast total IT market spending reaching BRL117.4bn by 2020. We continue to highlight opportunities in the enterprise market for cost efficiencies and flexibility-generating solutions in the short term during the period of economic uncertainty - and emerging technologies such as IoT solutions and cloud computing over the medium term.

Latest Updates & Industry Developments

Computer Hardware Sales: BRL37.0bn in 2016 to BRL48.5bn in 2020. 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 BRL27.0bn in 2020. 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 BRL41.9bn in 2020. IT services

forecast to continue outperforming over the medium term based on enterprise demand for cloud services and Internet of Things (IoT) solutions.

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