

Brazil Information Technology Report Q4 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: The Brazilian IT market contracted sharply in 2015, with further, albeit less substantial, decline forecast for 2016 due to a combination of political and economic factors. As the economy emerges from recession and the political situation stabilises we envisage a return to IT market spending growth from 2017, but we expect momentum to be weak. Our Country Risk team forecasts modest GDP and consumption growth, while in the IT market there are negative trends such as the cannibalisation of PC sales by smartphones. These combine in our core scenario for IT spending to increase at a CAGR of 4.6% over 2016-2020.

Latest Updates & Industry Developments

Computer Hardware Sales: BRL32.1bn in 2016 to BRL35.2bn in 2020. Outlook lowered as a result of the negative impact of smartphone ownership on PC replacement spending.

Software Sales: BRL20.5bn in 2016 to BRL25.3bn in 2020. Cloud expected to gain traction due to potential cost savings that will prove attractive in uncertain and low-growth environment.

IT Services Sales: BRL31.0bn in 2016 to BRL39.5bn in 2020. Cost savings offered by IT services will make it the outperforming segment, with cloud computing and outsourcing expected to be strong product categories.

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