

## **Brazil C4ISR - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

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### **Report description:**

The Brazil C4ISR Market size is estimated at USD 424.15 million in 2024, and is expected to reach USD 474.07 million by 2029, growing at a CAGR of 2.25% during the forecast period (2024-2029).

The defense sector in Brazil has faced unmatched challenges due to the COVID-19 pandemic. The defense expenditure gradually decreased from 2018 to 2021. The defense budget in 2022 increased by 1.9% from 2021. According to the SIPRI, Military expenditure in South America fell by 2.1% to USD 43.5 billion in 2020. The decrease was mainly due to a 3.1% decline in spending by Brazil, the subregion's largest military spender.

The growth of the Brazilian control, command, communications, computer, intelligence, surveillance, and reconnaissance (C4ISR) market can be majorly attributed to factors, such as the increasing security and cyberattacks and growth in terrorism and hostile activities inside and in the adjacent countries of the Brazilian territory. An increase in demand for advanced command and control systems and rising procurement of next-generation weapons propel the market growth during the forecast period. The demand for the modernization of threat perception capabilities of the defense forces in Brazil is anticipated to drive the demand for C4ISR systems.

### Brazil C4ISR Market Trends

#### Increasing Military Spending is Expected to Drive the Market Growth During the Forecasts Period

Brazil is the second-largest military spending region in both the Americas. According to Stockholm International Peace Research Institute (SIPRI), Brazil's defense expenditure fell by 4.3% in 2021, to USD 19.2 billion still the country remained the largest

military spender in the subregion. Despite the cut in defense expenditure, the country was able to make the planned payments for its strategic armament programs that include the procurement of 36 Gripen combat aircraft from Sweden.

Brazil was the 17th largest defense spender in the world in 2021. The market is expected to be benefitted from such a high level of military spending by Brazil. As a result of higher military budgets over the years, the country has witnessed several military fleet and equipment modernization activities in the last five years. However, Brazil's economy was experiencing a slowdown even before the arrival of the COVID-19 crisis, and the advent of the pandemic and the subsequent shutdowns have further affected the country's economy. This may lead the government to reduce defense budgets in the coming years.

For instance, in August 2022, the United States Defence Security Cooperation Agency (DSCA) notified Congress of a foreign military sale (FMS) of Javelin missiles and associated equipment to Brazil. As a part of the sale, the Brazilian Government requested a purchase of up to 33 Javelin command launch units (CLU) and 222 FGM-148 Javelin anti-tank missiles. The value of the contract was nearly USD 74 million. Thus, growing procurement of advanced weapon systems and C4ISR systems for enhancing military capabilities drive market growth across the country.

#### Air Segment is Projected to Dominate the Market During the Forecast Period

The air segment will showcase remarkable growth during the forecast period. The growth is attributed to the growing procurement of aerial vehicles and related C4ISR systems. Also, the country's modernization plans for unmanned aerial vehicles, combat aircraft, and helicopters are expected to propel the market demand. Also, technological advancements in C4ISR systems and the demand for multi-functional systems are propelling the investments made by manufacturers in the research and development of cost-effective solutions.

With the integration of advanced technologies into airborne platforms, the mission readiness of armed forces on the battlefield will be enhanced greatly. For instance, in March 2022, the Brazilian Army started receiving the Nauru 1000C unmanned aerial vehicles (UAVs) which the country ordered for intelligence, surveillance, target acquisition, and reconnaissance (ISTAR) missions. The Nauru 1000C is a fixed-wing vertical take-off and landing (VTOL) drone capable of operating in all-weather daylight and night-capable multi-missions. Such contracts are expected to propel the market prospects of the segment during the forecast period.

#### Brazil C4ISR Industry Overview

The Brazil C4ISR market is moderately consolidated in nature, with the presence of few players that provide a wide variety of C4ISR systems. Some of the prominent players in the market are Lockheed Martin Corporation, Embraer SA, Elbit Systems Ltd, Northrop Grumman Corporation, and Saab AB. Embraer SA, the local aerospace company, along with its affiliates, provides several land, space, and air-based C4ISR technologies to the Brazilian military. The company limited such offerings mainly to the Brazilian armed forces, and it has a strong foothold in the country. However, many other manufacturers provide C4ISR solutions for various platforms in Brazil, in addition to Embraer. These players are gradually growing their presence in the market by offering the latest technologies, thereby, increasing their revenues in the market.

#### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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