

Brazil Telecom - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Brazil Telecom Market size is estimated at USD 32.13 billion in 2024, and is expected to reach USD 43.34 billion by 2029, growing at a CAGR of 6.17% during the forecast period (2024-2029).

Most major telecom companies in the world, such as AT&T, Verizon, and Comcast, are based in Brazil. They promote innovation by making significant R&D investments consistently.

Key Highlights

- To fulfill the ongoing demand for faster networks, the Brazilian telecom industry made further strides in expanding its network capacity with more fiber and wireless deployments. For instance, Speedcast signed a long-term agreement with Nokia to deploy its private wireless network technology for mining and energy enterprise customers. The new project will see the deployment of the Nokia Digital Automation Cloud (DAC) to provide high-quality, critical voice and video connectivity for workers on site.
- According to the GSMA report, in 2021, the country had a smartphone adoption rate of 84%, which is expected to rise to 88% by 2025. The estimated subscriber penetration for FY 2025 is 75%. As per the study, 4G penetration in Brazil was 80% in 2021, compared to 16% and 4% for 3G and 2G, respectively. The country is expected to have 5G adoption of 20% by the end of 2025.
- Telecom operators are slowly deploying 5G services across Brazil. For instance, America Movil launched 5G services in Sao Paulo, Brazil. In the Future, all customers are expected to migrate from 3G and 4G networks to the 5G network slowly.
- In September 2022, Amdocs network solution company signed a six-year contract with Brazilian telco Winity Telecom to support the operator with its 4G and 5G rollout across remote areas of the country. Telecom operators such as Claro, TIM, and Algar are increasingly shifting to 5G networks, bringing new opportunities for customers across the telecom market.
- The COVID-19 pandemic significantly impacted the Brazilian telecommunication industry and other facets of daily life across the country. Due to the pandemic, a large portion of the Brazilian population has been forced to spend time almost constantly at

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home, which has increased remote jobs, telemedicine, online education, and streaming in-home entertainment. However, on the other hand, the pandemic has also harmed the live effect on the pay-TV business and the cable TV industry. Post COVID-19 scenario created an unexpectedly high demand for mobile, fixed broadband, and OTT services.

Brazil Telecom Market Trends

Deployment of 5G Network in Brazil

- The growth in Brazil's telecom Market has been driven by the increasing population, communication services, and rising adoption of smartphone services. The growth is expected to be supported further by regulatory authorities, which play a significant role in the transition to the 5G network in the country.
- The adoption of 5G technology is increasing among the key players in Brazil, such as AT&T, Verizon, and Claro. These key players are creating a roadmap for the deployment of next-generation 5G through strategic alliances. For instance, in December 2021, Claro launched its first commercial 5G network in Brasilia and Sao Paulo. Implementation of a 5G network will help transfer data at a higher speed, connecting several devices simultaneously.
- According to the GSMA report, Brazil is the first country expected to have more than USD 218 million smartphone connections in 2025. The demand for deploying 5G networks is expected to grow significantly with the increasing adoption of smartphone connections.
- 3G and 4G customers are now slowly migrating to the 5G network. The transition to 5G is still rising in the country due to expanding new networks and the expansion of the device ecosystem. Key players in the market, Claro and Telefonica's 5G networks, serve 15 cities and eight cities across Brazil, respectively.
- Key players in the telecom market are focused on offering wireless services that support 4G and 5G networks. According to the survey from American Tower, Vivo (Telefonica) wireless service provider have the highest market share of 38% among other telecom players (Telecom Italia, Claro (America Movil), etc.).

Rising Demand for OTT and Pay-TV Services

- The Brazilian telecom market is expected to grow significantly over the forecast period with the rising adoption of OTT (over-the-top) and pay-TV services in the sector that connects with wired and wireless broadband.
- According to Cullen International, among the eight countries surveyed, Brazil and Canada are considering legislation to have OTT services contribute to the production of domestic video content. High-quality video channels, flexibility, and scalability deliver world-class OTT streaming services for customers, which is expected to continue boosting growth in the Brazilian telecom market.
- Amazon Prime Video is one of the OTT service providers in Brazil. Brazilian Grupo Globo and Amazon Prime Video partnered to provide Premiere Prime Video Channels in Brazil. It is a series of pay-TV channels that broadcast football league matches in Brazil under the PPV modality. Amazon Prime Video also started offering live sports streaming in the country. These OTT service providers are expected to create new growth opportunities for the telecom market.
- Netflix gained 2.9 million new subscribers in Q1 2021. The relationship between telecom enterprises and OTT service providers is expected to bring new customers into the market.
- According to Ookla Speedtest Global Index, Brazil ranked 65th with a median mobile download speed of 31.52 Mbps. Customers are migrating to mobile-based OTT services, thus creating new growth opportunities for the telecom market.

Brazil Telecom Industry Overview

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The Brazilian telecom market is moderately fragmented in nature owing to the ongoing partnerships and recent advancements in the market. Some major players in the market studied include AT&T, Verizon, Telefonica, TIM Brasil, and Comcast.

- March 2022: TIM Brasil and Huawei signed an MoU to develop a 5G City in Brazil. This project aims to develop a smart city through 5G networks, with the first test completed by December 2023.
- October 2022: Claro announced its plan to extend 4G and 5G-ready mobile services. SES signed a multi-year capacity renewal with Claro through Embratel to support connectivity in at least eight cities across Brazil with the O3b mPOWER network.

Additional Benefits:

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

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