

Brazil Metal Fabrication Equipment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 150 pages | Mordor Intelligence

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Report description:

Brazil Metal Fabrication Equipment Market Analysis

The Brazil Metal Fabrication Equipment Market is valued at USD 1.42 billion in 2025 and is forecast to reach USD 1.71 billion by 2030, advancing at a 3.73% CAGR. Rising infrastructure spending, robust vehicle production plans focused on electric and hybrid models, and intensive pre-salt oil and gas developments are combining to lift demand for precision machining, cutting, and welding systems. Public-sector programs such as PAC 2024-27 and Lei do Bem are widening access to modernization capital, while import tariffs of 14%-20% protect local manufacturers and give domestically produced equipment a pricing edge. Supply growth remains brisk in automatic systems as producers move toward connected, sensor-driven operations that reduce scrap and energy use. Conversely, volatile steel input prices, constrained grid reliability in the North and Northeast, and a persistent shortage of skilled CNC operators temper the short-term spending outlook.

Brazil Metal Fabrication Equipment Market Trends and Insights

Accelerated Pre-Salt O&G Field Development Boosting High-Spec Equipment Demand

Petrobras plans to drill 280 new wells by 2028 under a USD 102 billion spending program, driving unprecedented demand for ultra-high-tolerance cutting and welding systems that handle corrosion-resistant alloys for subsea pipelines and floating production units. Constellation Oil Services reports rig day rates nearing USD 500,000, evidence of premium equipment needs. Tenaris and Equinor recently delivered 83,000 tons of steel pipe for the Raia project, underscoring sustained Southeast demand

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for sophisticated fabrication.

Expansion of Brazilian EV/Automotive Clusters Spurring CNC Adoption

Automakers have announced more than USD 6 billion in fresh plant upgrades to build electric models. General Motors alone is committing USD 1.4 billion through 2029, while Toyota earmarked USD 2.22 billion, which includes USD 1 billion by 2026, for locally tailored vehicles. Precision CNC machines are central to new battery-pack frames and lightweight chassis components, lifting orders across Sao Paulo and Parana.

Volatile Steel Input Prices Compressing Capex Budgets

Fluctuating coil prices and antidumping policy shifts are creating budgeting uncertainty for plants planning new lines. Gerdau cut its five-year outlay target to R\$9.2 billion(USD 1.75 billion), blaming squeezed margins tied to cheap Asian imports. ArcelorMittal similarly paused its Joao Monlevade expansion, stalling orders for heavy presses and automated roll grinders.

Other drivers and restraints analyzed in the detailed report include:

PAC 2024-27 Infrastructure Pipeline Driving Large-Scale Steel Fabrication / Lei do Bem Tax Incentives Catalyzing Industry 4.0 Investments / Grid Instability in North/Northeast Limiting High-Power Machine Uptime / / /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Automatic systems held 52.5% of the Brazil metal fabrication equipment market in 2024, and revenue is rising at a 4.7% CAGR to 2030. Factory owners see paybacks under three years when integrated robotics cuts rework and scrap. Semi-automated machines remain popular among medium enterprises taking a modular upgrade route, whereas fully manual benches survive in artisan workshops and for intricate stainless-steel finishes.

Government digitalization funding of BRL 186.6 billion(USD 35.45 billion) and the Brasil Mais Produtivo program's BRL 560 million(USD 106.4 million) allocation for small manufacturers are accelerating control retrofits and sensor deployments. Nonetheless, surveys in the Sorocaba region found only 46% of firms familiar with core Industry 4.0 concepts. The gap suggests a long runway for automatic-equipment adoption as awareness programs expand.

Machining equipment captured 42.33% of the Brazil metal fabrication equipment market in 2024, reflecting the country's deep heritage in turning, milling, and drilling for engines, gearboxes, and agricultural machinery. The machining Brazil metal fabrication equipment market size for this segment is projected to climb alongside EV-related lightweight components. Meanwhile, welding equipment revenue is increasing at a 5.2% CAGR, led by multiprocess power sources tailored to offshore alloy steels.

Exhibitors at FEIMEC 2024 highlighted integrated cells combining CNC mills with inline robotic welders and AI-driven inspection, moving the sector toward end-to-end digital lines. Cutting and forming machines continue to parallel overall market growth as construction orders for plate shears and press brakes track rail and port upgrades.

The Brazil Metal Fabrication Equipment Market Report is Segmented by Automation Level (Automatic, Semi-Automated Equipment, and More), by Equipment Type (Cutting, Machining and More), by End-User Industry (Automotive & Transportation, Construction & Infrastructure, and More), and by Region (Southeast (Sudeste), South (Sul), and More). The Report Offers Market Size and Forecasts in Value (USD) for all the Above Segments.

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List of Companies Covered in this Report:

Amada Co. Ltd. / DMG Mori Seiki AG / Colfax Corp. (ESAB) / Lincoln Electric Holdings Inc. / BMA Brasil Equipamentos / Shenyang Machine Tool Co. Ltd. / Hurco Companies Inc. / MAG Giddings & Lewis / Kennametal Inc. / Trumpf GmbH / Bystronic AG / Prima Power / Koike Aronson Inc. / ESAB Group Inc. / Miller Electric Mfg. (ITW) / Hypertherm Inc. / Atlas Copco AB / Atotech Group / JIER Machine Tool Group / JFY Sheet Metal Tech. / Doosan Machine Tools / Faccin S.p.A.* /

Additional Benefits:

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

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