

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

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

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

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

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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.

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 /

Table of Contents:

1 Introduction

1.1 Study Assumptions & Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

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

4.2.2 Expansion of Brazilian EV/Automotive Clusters Spurring CNC Adoption

4.2.3 PAC 2024-27 Infrastructure Pipeline Driving Large-Scale Steel Fabrication

4.2.4 Lei do Bem Tax Incentives Catalyzing Industry 4.0 Investments

4.2.5 FINAME Local-Content Mandates Favouring Domestic Equipment Purchases

4.2.6 Rising Mercosur Module Exports Requiring Capacity Upgrades

4.3 Market Restraints

4.3.1 Volatile Steel Input Prices Compressing Capex Budgets

4.3.2 Grid Instability in North/Northeast Limiting High-Power Machine Uptime

4.3.3 CNC Skilled-Labour Shortage Restraining Automation ROI

4.3.4 Import Tariffs (14-20 %) Inflating Advanced Equipment Costs

4.4 Value/Supply-Chain Analysis

4.5 Regulatory Outlook - Government Regulations & Key Initiatives

4.6 Technological Outlook - Technology Advancements (Automation, Laser, AI)

4.7 Industry Attractiveness - Porter's Five Forces

4.7.1 Bargaining Power of Suppliers

4.7.2 Bargaining Power of Buyers

4.7.3 Threat of New Entrants

4.7.4 Threat of Substitutes

4.7.5 Competitive Rivalry

5 Market Size & Growth Forecasts (Value, In USD Billion)

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.1 By Automation Level

5.1.1 Automatic

5.1.2 Semi-Automated Equipment

5.1.3 Manual Equipment

5.2 By Equipment Type

5.2.1 Cutting (Laser, Plasma, Waterjet, Oxy-fuel, etc.)

5.2.2 Machining (Lathes, Milling, Drilling, etc.)

5.2.3 Forming (Press Brakes, Bending Machines, etc.)

5.2.4 Welding (Arc Welding, Laser Welding, etc.)

5.2.5 Other Equipment Types (Finishing, Handling, Tooling, etc.)

5.3 By End-User Industry

5.3.1 Automotive & Transportation

5.3.2 Construction & Infrastructure

5.3.3 Oil & Gas / Energy

5.3.4 Aerospace & Defense

5.3.5 Heavy Machinery & Industrial Equipment

5.3.6 Others (Electronics, General Manufacturing, Marine, Railways, etc.)

5.4 By Region

5.4.1 Southeast (Sudeste)

5.4.2 South (Sul)

5.4.3 Northeast (Nordeste)

5.4.4 North (Norte)

5.4.5 Central-West (Centro-Oeste)

6 Competitive Landscape

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Products & Services, and Recent Developments)

6.4.1 Amada Co. Ltd.

6.4.2 DMG Mori Seiki AG

6.4.3 Colfax Corp. (ESAB)

6.4.4 Lincoln Electric Holdings Inc.

6.4.5 BMA Brasil Equipamentos

6.4.6 Shenyang Machine Tool Co. Ltd.

6.4.7 Hurco Companies Inc.

6.4.8 MAG Giddings & Lewis

6.4.9 Kennametal Inc.

6.4.10 Trumpf GmbH

6.4.11 Bystronic AG

6.4.12 Prima Power

6.4.13 Koike Aronson Inc.

6.4.14 ESAB Group Inc.

6.4.15 Miller Electric Mfg. (ITW)

6.4.16 Hypertherm Inc.

6.4.17 Atlas Copco AB

- 6.4.18 Atotech Group
- 6.4.19 JIER Machine Tool Group
- 6.4.20 JFY Sheet Metal Tech.
- 6.4.21 Doosan Machine Tools
- 6.4.22 Faccin S.p.A.*

7 Market Opportunities & Future Outlook

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

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

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Company Name*	<input type="text"/>	City*	<input type="text"/>
Address*	<input type="text"/>	Country*	<input type="text"/>
Zip Code*	<input type="text"/>	Date	<input type="text" value="2026-02-17"/>

Signature

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com