

## **Brazil Cloud Computing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 161 pages | Mordor Intelligence

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### **Report description:**

Brazil Cloud Computing Market Analysis

The Brazil cloud computing market is expected to grow from USD 3.24 billion in 2025 to USD 3.82 billion in 2026 and is forecast to reach USD 8.71 billion by 2031 at 17.93% CAGR over 2026-2031. Rising enterprise digitization, heavy data-center spending, and the federal E-Digital cloud-first mandate give the Brazil cloud computing market a structural growth tailwind. Hyperscale providers have already committed more than USD 8 billion to local infrastructure, eroding historic latency and data-sovereignty barriers. Currency volatility does introduce price-planning risk, yet government AI incentives worth USD 4 billion through 2028 continue to unlock new high-performance and generative-AI workloads. Rapid uptake among small businesses, wider regional data-center dispersion, and sector-specific SaaS ecosystems further diversify revenue streams across the Brazil cloud computing market.

Brazil Cloud Computing Market Trends and Insights

Rapid digitalisation of Brazilian enterprises

Manufacturers have pledged BRL 186.6 billion to Industry 4.0 programs and regard cloud as core infrastructure, not a mere add-on. Cloud platforms underpin everything from supply-chain analytics to customer-experience re-design, and 74% of SMEs now run AI-enabled software that would be infeasible on legacy servers. National tax rebates inside the Growth Acceleration Program reward firms that demonstrate measurable digital gains, further reinforcing cloud adoption. The result is a step-change in IT-spend mix budget is gradually shifting from on-prem hardware toward pay-as-you-consume cloud services. Vendor roadmaps

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increasingly include Portuguese-language AI copilots that lower technical-skills barriers and accelerate time to value in the Brazil cloud computing market.

#### Surge in hyperscale data-center investments

Aggregate commitments above USD 8 billion continue to reshape the Brazil cloud computing market infrastructure footprint. AWS is investing USD 1.8 billion in Sao Paulo, while Scala Data Centers earmarked USD 3 billion for its AI City complex in Rio Grande do Sul. Twelve additional operators have broken ground in the Northeast, attracted by Fortaleza's cable-landing connectivity. On the demand side, local residence of data storage removes latency for e-commerce and streaming users in northern Brazil. On the supply side, clean-energy power-purchase agreements with new solar and wind farms help operators meet ESG goals and lower operating costs. Hyperscalers also partner with municipal authorities on fiber backhaul, lifting the entire digital-infrastructure baseline and broadening the addressable user base for the Brazil cloud computing market.

#### Rising sovereign-cloud and data-residency costs

Enterprises pay 15-25% higher run-rates to ensure data never leaves Brazil and to deploy LGPD-ready governance toolsets. Sovereign configurations are mandatory for public agencies and many BFSI or healthcare workloads, thus creating a price premium that can delay migrations. Dual-stack architectures are suitable for regulated data and global cloud for everything else, adding integration burden and dilute economies of scale. Although Serpro's Government Cloud offers an in-country option, its pricing remains above basic hyperscale tariffs. Consequently, some projects stick to hybrid designs longer than optimal, putting a slight drag on overall CAGR for the Brazil cloud computing market.

Other drivers and restraints analyzed in the detailed report include:

Federal E-Digital cloud-first mandate  
FinTech boom requiring scalable infrastructure  
Acute shortage of cloud-certified talent

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

#### Segment Analysis

Public cloud commanded 62.78% Brazil cloud computing market share in 2025, underpinned by hyperscale zones that satisfy most latency and residency needs. IaaS remains the entry point for lift-and-shift migrations, whereas PaaS and serverless are now the growth engines as developers seek managed Kubernetes and vector database offerings. SaaS finds particular resonance with SMEs that view subscription pricing as an operational expense rather than capital outlay. Enterprises cite faster procurement and elastic scaling as primary benefits, pushing mission-critical ERP and analytics into the public domain. The segment's depth makes it the largest contributor to Brazil's cloud computing market size, and pricing innovations like savings-plan models strengthen stickiness.

Hybrid cloud tallied the fastest growth at a 21.46% CAGR, validated by heavily regulated banks and hospitals that route sensitive data to local private stacks while bursting spikes to public zones. Providers ship pre-integrated hardware appliances, enabling consistent APIs and easing compliance audits. Private cloud usage persists but is increasingly adopted as on-prem extensions managed through the same control plane as public resources, a shift that keeps the Brazil cloud computing market fluid and multi-cloud centric.

The Brazil Cloud Computing Market Report is Segmented by Type (Public Cloud With IaaS, Paas, Saas; Private Cloud; Hybrid Cloud), Organization Size (SMEs, Large Enterprises), End-User Industry (Manufacturing, Education, Retail and E-Commerce, Transportation and Logistics, Healthcare, BFSI, Telecom and IT, and More), and Geography. The Market Forecasts are Provided in

Terms of Value (USD).

List of Companies Covered in this Report:

Amazon Web Services, Inc. Microsoft Corporation Google LLC (Alphabet Inc.) International Business Machines Corporation (IBM) Alibaba Group Holding Limited Oracle Corporation SAP SE Salesforce, Inc. Huawei Technologies Co., Ltd. Locaweb Servicos de Internet S.A. TIVIT Tecnologia da Informacao S.A. UOL Diveo Tecnologia Ltda. Claro S.A. (Embratel Cloud) Telefonica Brasil S.A. (Vivo Cloud) Globo Comunicacoes e Participacoes S.A. (Globo Cloud) Scala Data Centers S.A. EdgeUno, Inc. Digifort Inovacoes Tecnologicas Ltda. TOTVS S.A. Semantix, Inc.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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