

Brazil Demand for Mobile Data Services Remains Strong Amid Challenging Macroeconomic Conditions

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Summary

In 2016, Brazil will be the largest telecom services market in Latin America. Disconnections in the [pay-TV and circuit-switched markets](#) will affect the growth of the telecom market in Brazil in 2016. Additionally, the challenging macroeconomic situation coupled with additional cuts in mobile termination rates (MTRs) and reductions in fixed circuit-switched tariffs terminating on mobile networks will further impact market growth and operator revenue. With recovery beginning in 2017 and the voice-to-data substitution trend in the mobile segment, growth in the Brazilian telecom market will be mainly driven by the increase in mobile data revenue.

Key Findings

- The top three operators, Vivo, Claro (America Móvil) and Oi, which provide mobile, fixed and pay-TV services, will account for 74.8% of overall service revenue in 2016. In 2015, Vivo concluded the acquisition of GVT, expanding its presence outside its concession area for fixed services and increasing its market share.

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- Adoption of 3G services will reach its peak during 2016, and will start to decline from 2017 as 3G to 4G/LTE migration intensifies.
- Despite Brazil's challenging economic environment, equipment vendors and software providers have opportunities in select areas in the near term such as operators' LTE deployments, fiber-optic network rollouts, SDN/NFV opportunities and services geared toward the B2B segment, such as data center and cloud computing, where vendors can leverage network services and



management solutions.

Synopsis

“Brazil: Demand for Mobile Data Services Remains Strong Amid Challenging Macroeconomic Conditions” provides an executive-level overview of the telecommunications market in Brazil today, with detailed forecasts of key indicators up to 2021. It delivers deep quantitative and qualitative insight into the Brazilian telecom market, analyzing key trends, evaluating near-term opportunities and assessing risk factors, based on proprietary data from Pyramid Research’s databases.

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The Country Intelligence Report provides in-depth analysis of the following:

- Regional context: telecom market size and trends in Brazil compared with other countries in the Latin American region.
- Economic, demographic and political context in Brazil.
- The regulatory environment and trends: a review of the regulatory setting and agenda for the next 18-24 months as well as relevant developments pertaining to national broadband plans and other infrastructure developments.
- A demand profile: analysis as well as historical figures and forecasts of service revenue from the fixed telephony, broadband, mobile voice and mobile data segments.
- Service evolution: a look at changes in the breakdown of overall revenue between the fixed and mobile sectors and between voice, data and video from 2014 to 2021.
- The competitive landscape: an examination of key trends in competition and in the performance, revenue market shares and expected moves of service providers over the next 18-24 months.
- In-depth sector analysis of fixed telephony, broadband, mobile voice and mobile data services: a quantitative analysis of service adoption trends by network technology and by operator, as well as of average revenue per line/subscription and service revenue through the end of the forecast period.
- Main opportunities: this section details the near-term opportunities for operators, vendors and investors in the Brazilian telecommunications market.

Reasons To Buy

- Gain in-depth analysis of current strategies and future trends of the Brazilian telecommunications market, service providers and key opportunities in a concise format, to build proactive and profitable growth strategies.
- Understand the factors behind ongoing and upcoming trends in the Brazilian communications, fixed telephony and broadband markets, including the evolution of service provider market shares, to align product offerings and strategies to meet customers’ demand.
- Leverage the graphical information (more than 20 charts and tables in the report based on the Pyramid Research forecast products), to gain an overview of Brazil’s telecom market.
- Analysis of key telecom players in the markets and major business strategies being adopted by them, to identify the opportunities to improve market share.
- Explore novel opportunities to align your product strategies and offerings to meet the requirements and succeed in the challenging telecommunications market in Brazil.

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