

Business Dynamics: Brazil

May 2023

Table of Contents

HEADLINES

OPERATIONAL AND REGULATORY ENVIRONMENT

Heavy tax burden, lack of fiscal soundness and high trade tariffs clouds Brazil's business environment

FINANCING AND INVESTMENT

Soaring inflation hinders business access to credit, yet Brazil remains an attractive FDI destination

SKILLS AND LABOUR

Low higher education attainment rates and widespread labour informality remains major challenges

TRADE AND INFRASTRUCTURE

Subdued infrastructure investments drag down logistics growth potential while heavy non-tariff barriers limit trade capabilities

DIGITALISATION AND INNOVATION

With high internet penetration and rapidly growing internet usage by the businesses, Brazil holds solid innovative potential

OPERATIONAL AND REGULATORY ENVIRONMENT

Chart 1 - Operational and Legal Environment Key Indicators

Chart 2 - Index of Economic Freedom Ranking by Pillar in Brazil and Regional Comparison 2022

Chart 3 - Index of Economic Freedom Ranking 2017-2022

Chart 4 - Index of Economic Freedom: Judicial Effectiveness Pillar Rank in Brazil and Regional Comparison 2017-2022

Chart 5 - Index of Economic Freedom: Government Integrity Pillar Rank in Brazil and Regional Comparison 2017-2022

Chart 6 - Corruption Perceptions Ranking: Brazil and Regional Comparison 2017-2022

FINANCING AND INVESTMENT

Chart 7 - Key Financial and Investment Indicators

Chart 8 - Index of Economic Freedom: Property Rights Pillar Rank in Brazil and Regional Comparison 2017-2022

Chart 9 - Bank Claims on the Private Sector as % of GDP 2017-2022

Chart 10 - Bank Nonperforming Loans to Total Gross Loans 2017-2022

SKILLS AND LABOUR

Chart 11 - Key Skills and Labour Indicators

Chart 12 - Population Aged 15+ with Higher Education 2017-2022

Chart 13 - Education Indicators 2022

Chart 14 - Number of University Graduates by Programme 2022

Chart 15 - Employment by Age 2022

Chart 16 - Employment by Gender 2022

Chart 17 - Youth Unemployment Rate 2017-2022

Chart 18 - Labour Structure Change 2017-2022

Chart 19 - Labour Structure Comparison 2022

Chart 20 - Self Employed as % of Total Employed Population 2022

Chart 21 - Index of Economic Freedom: Labour Pillar Rank in Brazil and Regional Comparison 2017-2022

Chart 22 - Wage per Hour in Manufacturing Sector 2017-2022

Chart 23 - Labour Market Regulations in Brazil and Regional Comparison 2022

TRADE AND INFRASTRUCTURE

Chart 24 - Key Infrastructure Indicators

Chart 25 - Index of Economic Freedom: Trade Freedom Pillar Rank in Brazil and Regional Comparison 2017-2022

Chart 26 - The Top Four Largest Brazil's Export Categories 2017-2022

Chart 27 - Turnover of Transport and Storage Industry by Category in Brazil 2022

Chart 28 - Transportation Mode Indicators in Brazil and Regional Comparison

Chart 29 - Road Infrastructure 2022

DIGITALISATION AND INNOVATION

Chart 30 - Innovation and Digitalisation Key Indicators

Chart 31 - Network Readiness Ranking by Pillar in Brazil and Regional Comparison 2022

Chart 32 - Network Readiness Ranking for Brazil and Regional Comparison 2019-2022

Chart 33 - Network Readiness Ranking: Technology Pillar for Brazil and Regional Comparison 2019-2022

Chart 34 - Intellectual Property: Brazil Compared to Selected Regional Peers 2022

APPENDIX A

The 2022 Index of Economic Freedom

APPENDIX B

The Network Readiness Index (NRI) 2022

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/business-dynamics-brazil/report.