

# BRAZIL EDUCATION MARKET OUTLOOK TO 2020

Driven by Rising Preferences for Higher Education  
and Innovations in Classroom Teaching

**December 2015**



## PRODUCTS MENTIONED

K-12 Market  
Pre- School  
Elementary and High School  
Higher Education Market  
Test Preparation  
Teacher Training  
Vocational and Technical Education  
E-learning  
Youth and Adult Education



## COMPANIES MENTIONED

American School of Sao Paulo, American School of Brasilia, American School of Recife, American School of Bole Horizonte, Rio International School, International School of Florianópolis, SEB COC Education, Bradesco Foundation, Centro de Ensino Faria Brito, Colégio Intellectus, F K Partners, SAN IVES International Language Centre, The DUX Institute, Scholar Idiomias, Flow Idiomias



## Key Topics Covered

- The market size and segmentation of Brazil education market on the basis of type of education
- The market size and segmentation of Brazil K-12 education market by gender, level of education and regional distribution
- Snapshot on M-Learning Market
- The market size of Brazil Pre-school education market
- The market size of Brazil Elementary and High School education market
- The market size of Brazil higher education market
- The market size and segmentation of Brazil test preparation market by type of tests
- The market size and segmentation of Brazil teacher training and education market by teacher training course
- The market size and segmentation of Brazil vocational and technical education market by region, gender, rural and urban region as well as concurrent and subsequent enrollments
- The market size and segmentation of Brazil E-learning market by technology and content services
- The market size and segmentation of Brazil youth and education market by level of education and gender
- Trends and Development, SWOT Analysis, PEST Analysis, Porters' 5 Forces in Brazil education market
- Competitive landscape of major private players in Brazil education market
- Future outlook and projections of Brazil education market and Analyst Recommendations

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[China Education Industry Outlook to 2012 - Evolving Hong Kong Higher Education Sector](#)

**Key Highlights of the Report**

- Discussed leading players and landscape
- Industry statistics from 2010 to 2015 and forecast from 2016 to 2020 in terms of revenue
- Detailed discussion of the market segments
- Regulatory and macro economy environment
- Opportunities let by industry developments

## WHAT HAVE BEEN THE FACTORS BEHIND THE GROWTH OF EDUCATION MARKET IN BRAZIL?

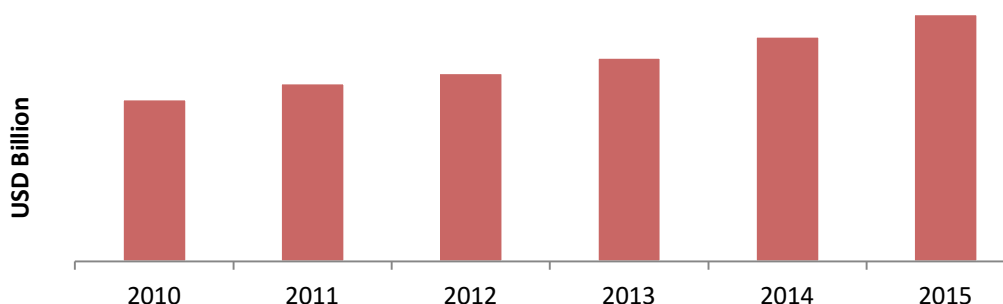
Brazil Education Market has witnessed a significant growth in the last few years from 2010-2015. The country has witnessed a positive growth rate in the education sector both in number of enrollments and revenue. The total revenue in 2010 recorded at USD ~ billion which further inclined to USD ~ billion during 2013 owing the new initiatives by MOE which has created a new exam called National Examination Entrance at the Teaching Career (NEETC) for all new teacher candidates. The examination has helped the country to provide quality teachers hence an increase in the enrollments level has been observed. In addition, the market for e-learning has also witnessed an escalation since there have been several steps taken by the government in order to augment the penetration of digital education amongst schools, colleges and universities in the country.

This includes dissemination of digital learning development by increasing awareness through integrated seminars and workshops in the country. The Brazil education market recorded overall revenue of USD ~ billion in 2015.

On an average, the government of Brazil has been spending nearly ~% of its GDP in the period 2010-2015 on education sector, which is comparatively higher than most OECD countries.

The K-12 market has been dominating the overall education sector by contributing the highest revenue in the review period. On the other hand, E-learning in Brazil recorded the highest growth CAGR of ~% in terms of revenue during the period 2010-2015.

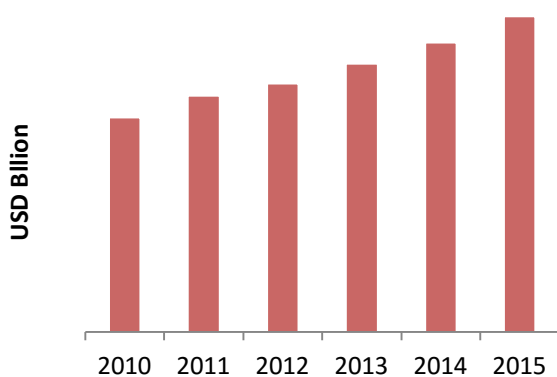
Figure: Brazil Education Market Size on the Basis of Revenue in USD Billion, 2010-2015



## WHICH FACTORS HAVE DRIVEN THE GROWTH OF K-12 EDUCATION IN BRAZIL?

K-12 education market has been the largest contributor to the revenues of Brazil education market during the period 2010-2015. The overall market size in terms of revenue of the K-12 segment was accounted for USD ~ billion in 2015. The Brazil K-12 Education market has been largely dominated by Elementary and High School market and the overall market contributed ~ % to the overall revenues of the K-12 education market in 2015. By number of institutes, public schools have been leading with over ~% of the total schools in Brazil.

**Figure: Brazil K-12 Education Market Size by Revenue in USD Billion, 2010-2015**



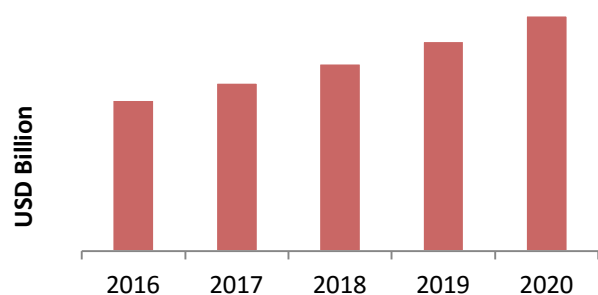
South East region constituted the highest share of ~% to the overall revenue of K-12 education market in 2015. Such high contribution from southeast region has been possible because of the fact that it is home to nearly ~% of the Brazilians. Additionally, it has been the one of the most developed regions in Brazil constituting states such as Sao Paulo and Rio de Janeiro.

**Table: Brazil K-12 Market Segmentation by Regional Distribution on the Basis of Number of Enrollments in Thousand, 2010-2015**

Region	2010	2011	2012	2013	2014	2015
Southeast						
Northeast						
South						
Midwest						
North						
<b>Total</b>						

Brazil's K-12 education industry is expected to grow at a CAGR of ~% during 2016-2020, with revenues are estimated to reach USD ~ billion in 2020. Due to the increasing population of the country and an increasing purchasing power, Brazilians are expected to possess a higher disposable income which they will utilize in developing and obtaining advanced level of education. Overall, the government's role in the K-12 education industry is expected to widen in the coming years.

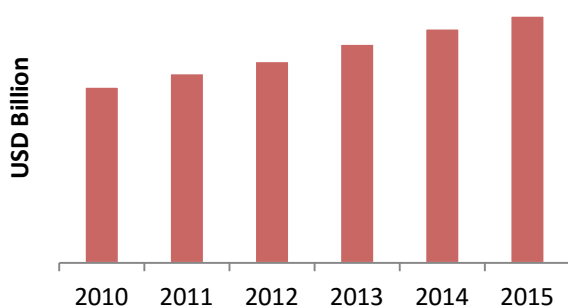
**Figure: Brazil K-12 Education Market Future Projections on the Basis of Revenue in USD Billion, 2016- 2020**



## HOW HAS THE HIGHER EDUCATION MARKET PERFORMED IN BRAZIL?

The Brazil higher education market has grown rapidly since 2010. Unlike the K-12 education market, higher education market has been led by the private sector in Brazil in terms of revenue contribution and by enrollments. The market size in terms of revenue for the higher education sector was accounted at USD ~ billion in 2010. Since then it has increased and reached USD ~ billion in 2015. In terms of enrollments, the overall higher education sector enrolled ~ million graduates and post graduate students in 2015.

**Figure: Brazil Higher Education Market Size on the Basis of Revenue in USD Billion, 2010-2015**



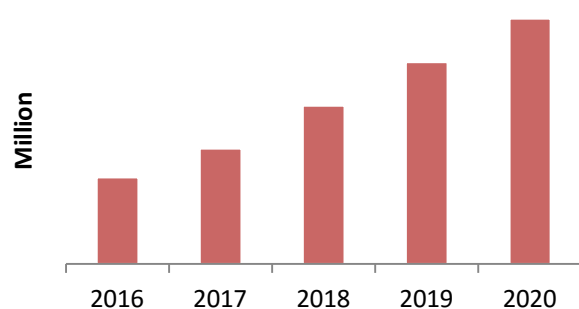
Brazil private higher education sector comprises of more than ~ post secondary institutions. This is approximately 87.1% of the total post secondary institutes in Brazil. Out of ~ institutes and colleges more than ~ institutes are owned and operated by 11 major players in the market. Kroton and Anhanguera form the largest conglomerate in the educational sector both in Brazil and in the world. The company contributed ~% to the total revenue of higher education market in 2015. The second largest player in the market is Estacio Education with a share of ~% in the market revenue.

**Table: Market Share of Major Players in Brazil Higher Education Market on the Basis of Revenue in USD Billion, 2015**

Players	Revenue (USD Billion)
Kroton Education	
Estacio Education	
UNIP	
Laureate	
UNINOVE	
Others	
Total	

The market for higher education offers ample opportunities for the business sector, which has marked a rise in the demand for higher education programs in Brazil. Moreover, the advent of technology based education in Brazil higher education institutes will enable the use of smart learning programs. This will be one of the major driving forces in Brazil higher education sector over the period of 2016-2020.

**Figure: Brazil Higher Education Market Future Projections on the Basis of Number of Enrollments in Million, 2016-2020**

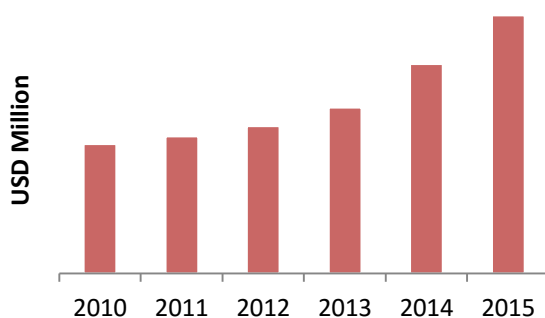


## HOW HAS THE TEST PREPARATION MARKET FLOURISHED IN THE RECENT PAST?

The competition amongst students has been increasing rapidly because of better access to education and increasing number of test takers. This in turn has created a need for high quality test preparation centers. The test preparation market in Brazil is still in its nascent stage and is dominated by the private sector establishments.

Numerous private test centers have been established which are helping students to train themselves in aptitude, English language skills and approach to excel in competitive exams. The Brazil test preparation market in terms of revenue has intensified at a promising CAGR of ~% over the period 2010-2015, with revenues been recorded at USD ~ million in 2015.

**Figure: Brazil Test Preparation Market Size by Revenue in USD Million, 2010-2015**



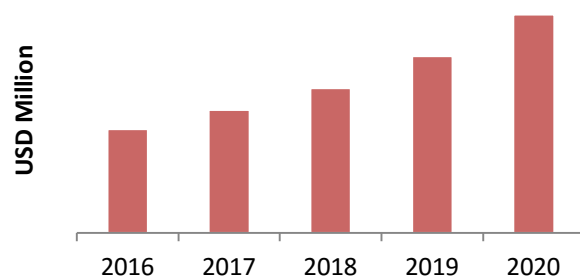
The market for Brazil test preparation has been dominated by TOEFL enrollments, which has accounted for ~% of the overall test preparation enrolments during 2015. This was followed by TOEIC test takers which accounted for ~% of the enrollments and were recorded at ~ thousand during 2015. The number of enrollments for GRE has witnessed an increase from ~ thousand in 2010 to ~ thousand in 2015.

**Table: Brazil Test Preparation Market Segmentation by Type of Tests (TOEIC, TOEFL, GMAT and GRE) on the Basis of Number of Enrollments in Thousand, 2010-2015(P)**

Type of Test	2010	2011	2012	2013	2014	2015
TOEFL						
TOEIC						
GMAT						
GRE						
<b>Total</b>						

Increase in the student population, escalating competition at under-graduate and graduate levels of education as well as demand for high quality education is likely to contribute towards the growth of this sector. With an extensive middle class people and economy rated as one of the fastest growing in the world, the country holds immense potential in the education sector. The country is also making tangible efforts towards mounting its education sector at the primary, secondary, and higher education levels in order to satisfy future knowledge demand. Taking these factors into account, the test preparation market in Brazil is expected to generate revenues of USD ~ million by 2020.

**Figure: Brazil Test Preparation Market Future Projections on the Basis of Revenues in USD Million, 2016-2020**

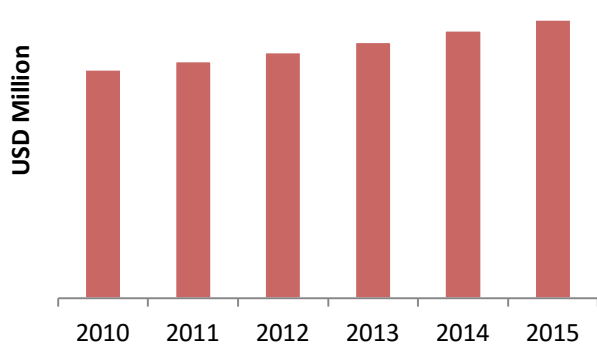




## WHAT HAS DRIVEN THE GROWTH OF TEACHER TRAINING AND EDUCATION MARKET IN BRAZIL?

Brazil teacher training market is presently in an abysmal stage with huge deficiency of trained and qualified teachers at both primary and secondary level of education. The teacher training market in Brazil has witnessed a CAGR of ~% in terms of revenue during the time period 2010-2015, as university education courses have gained higher popularity of teaching as a profession. An increase in the number of enrollments has been resulted, due to a huge shortage of teachers in Brazil. Private schools have found it difficult to recruit teachers from abroad.

**Figure: Brazil Teacher Training Market Size on the Basis on Revenue in USD Million, 2010- 2015**



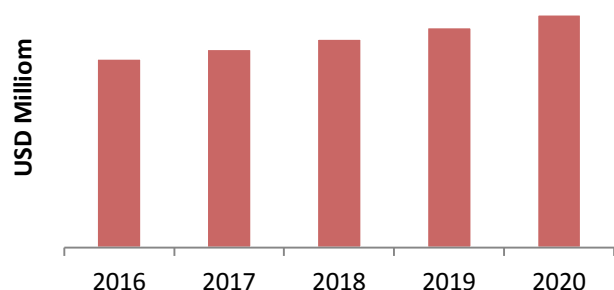
Brazil has been characterized by extreme regional disparities, with the richer South-eastern and Southern regions displaying better socioeconomic indicators. In 2015, the South east region accounted for highest number of teacher training institutes in Brazil. South East region has contributed to nearly ~% to the total market in terms of number of teacher training institutes. The southern region, which has accounted for a total of ~ teacher training institutes, has been able to capture ~% of the overall market.

**Table: Brazil Teacher Training and Education Market Segmentation by Regional Distribution on the Basis of Number of Institutes, 2015**

Regional Distribution	2015
Southwest	
South	
Northeast	
Midwest	
<b>Total</b>	

The high increase in demand for teachers will lead to the growth in the Brazil teacher training market. The government is planning to use innovative techniques to encourage the youth population to enroll in the education programs to pursue teaching as a profession. The teacher training market is expected to become more fragmented due to the increase in the number of universities as well as educational institutes across Brazil. This surge is expected to be witnessed in the private sector which is assisted by pro-business policies of the government. Contributed by these factors, Brazil teacher training industry is poised to grow at a remarkable CAGR of ~% for the period 2016-2020.

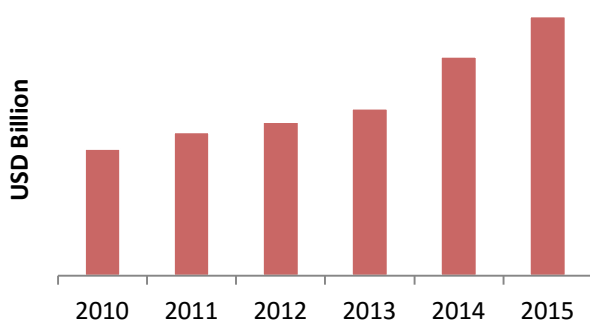
**Figure: Brazil Teacher Training and Education Market Future Projections on the Basis of Revenue in USD Million, 2016-2020**



## WHAT HAS BEEN THE CONTRIBUTION OF VOCATIONAL AND TECHNICAL EDUCATION IN BRAZIL EDUCATION MARKET?

The Brazil vocational and technical training market has witnessed a noteworthy growth in its revenues for the period 2010-2015. The technical and vocational training market in Brazil has majorly focused at improving the skills and competencies of the domestic as well as foreign students. The Brazilian vocational and technical training market has enlarged at a CAGR of ~% during 2010-2015, with revenues being registered at USD ~ million in 2015. The increase in revenues in the private vocational and technical education industry has resulted from the increase in the number of enrollments and increase of tuition fees

**Figure: Brazil Vocational and Technical Education Market Size by Revenue in USD Billion, 2010-2015**



In Brazil, the status of women has been changing over the last decades. The progressive participation of women in formal jobs; the expansion of women's education, and a greater role in family leadership, has changed their place in the Brazilian society. The number of female enrollments has contributed to share of ~% in the overall enrolments of vocational and technical education in the country.

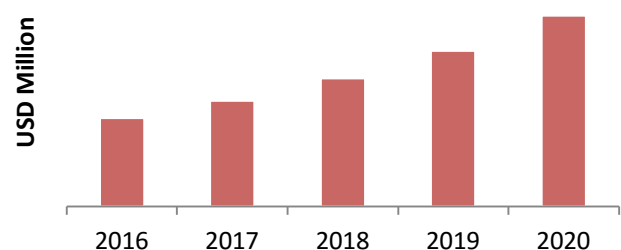
**Table: Brazil Vocational and Technical Education Market Segmentation by Gender on the Basis of Number of Enrollments in Thousand, 2010-2015**

Gender	2010	2011	2012	2013	2014	2015
Female						
Male						
Total						

To promote vocational and technical education in Brazil, the government has been boosting the number of vocational schools along with increase in the number of scholarships to talented students who opt for vocational education.

Over the period 2016-2020, Brazil government will also look forward to refocus the objectives of vocational and technical education and bridge the gap between academic study and skill requirements in the market. The revenue generated in the vocational and technical education market in Brazil is expected to increase to USD ~ million by 2020 with a CAGR of ~%.

**Figure: Brazil Vocational and Technical Education Future Projections by Revenues in USD Billion, 2016-2020**

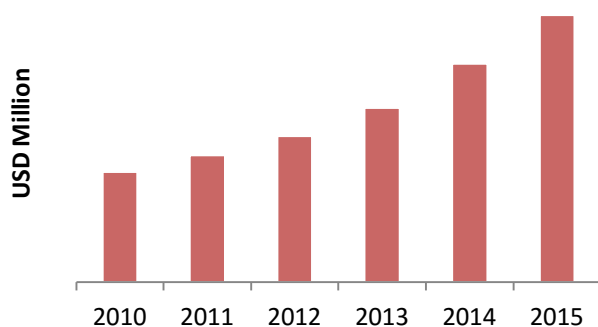


## HOW HAS THE E-LEARNING MARKET PERFORMED IN BRAZIL?

Brazil has emerged as one of the largest markets for e-learning in Latin America. As of 2015, the country occupies a share of nearly ~% in the revenue of Latin American e-learning market revenues. Brazil has witnessed a significant growth in the education market during the last 5 years. Leading renowned education institutions in the country have become more receptive towards the implementation of technological driven learning practices. The advent of technological advancements in the education landscape has enabled a number of benefits to the educational institutions as well as corporate trainers such as multi-modal training, online tests and tutorials, live video streaming with the teaching faculties and few more other facilities.

The government of Brazil has been buying a large proportion of digital publishing content available in the digital education market, providing to various schools, colleges and educational institutions. Various large-scale digitization initiatives in the schools, language-related educational policies have been established which are driving the digital education market in Brazil. The e-learning market in Brazil has grown from USD ~ million in 2010 to USD ~ million in 2015.

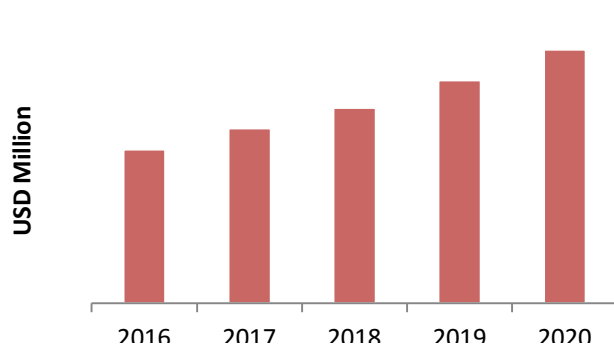
**Figure: Brazil E-Learning Market Size on the Basis of Revenues in USD Million, 2010-2015**



The m-education market has become one of the few segments of the digital learning market, which has been gaining massive traction in the last few years. Students across the country have been making a productive use of their electronic gadgets such as tablets, phablets and Smartphone. M-learning enables provision of educational content to students, teachers and employees on the mobile devices. The conventional education method has been rapidly transformed by mobile technology development in the country during the last few years. In 2010, the m-education generated annual revenue of worth USD ~ million, which increased at a prolific CAGR of ~% during 2010 to 2015.

The exchange of knowledge between the country and the rest of the world has become crucial factor for improving the education condition at Brazilian private and government universities. In the upcoming years, various modern tools and techniques such as smart classes, LMS, gamification and others will be deployed across more number of colleges, universities, corporate training centers and schools in the Brazil digital education market. The overall e-learning education market is expected grow at a CAGR of ~%, reaching a value of USD ~ million by 2020.

**Figure: Brazil E-Learning Market Future Outlook and Projections by Revenue in USD Million, 2016-2020**



## WHAT HAS DRIVEN THE GROWTH OF YOUTH AND ADULT EDUCATION IN BRAZIL?

Adult education is a type of education practice in which adults engage in learning activities to obtain knowledge, values and skills. Unlike the traditional schooling, adult education specially caters to people who have been unable to complete their education in the yesteryears but are driven to complete their basic education. The government of Brazil has always tried to target a larger segment of the population which has not enjoyed the benefits of formal schooling at the right age.

The government has been engaged in helping the adult citizens for their development in their professional competences. The country has been able to provide them with the academic credentials which have helped them survive in such competitive and selective employment market scenario. Furthermore, the education of young people and adults in Brazil has created a social and economic stability. The number of enrollments in adult education centers has increased at a CAGR of ~% over the period 2010-2015. During this period the country registered a continuous increase in the fees levels each year leading to increased market revenue. In 2015, the market constituted revenue of USD ~ million by registering a CAGR of ~% for the period of 2010-2015.

**Figure: Brazil Adult Education Market Size by Revenues in USD Million, 2010-2015**



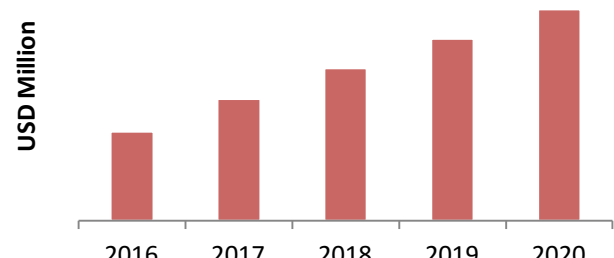
Adult education in Brazil is divided into two major education levels, elementary school and high school. The percentage distribution of the number of enrollments in the adult education centers in Brazil stood at ~ % and ~% for high school and elementary respectively in 2015. Over the years, there has been an increase in the number of students in high school students, whereas, the share of students in elementary school has decreased over the years.

**Table: Brazil Youth and Adult Education Market Segmentation by Level of Education on the Basis of Number of Enrollments in Thousand, 2010-2015**

Type	2010	2011	2012	2013	2014	2015
Elementary						
High School						
Total						

The increase in income levels of low income and middle groups along with social development of these classes will continue to reduce the number of dropouts in the country. The revenue generated in the youth and adult education market in the Brazil is expected to increase to USD ~ million by 2020, with a CAGR of ~% during 2016-2020.

**Figure: Brazil Youth and Adult Education Future Outlook and Projections by Revenue in USD Million, 2016-2020**



## HOW IS BRAZIL EDUCATION MARKET EXPECTED TO PERFORM IN THE FUTURE?

Brazil education market is projected to scale new heights in the coming years owing to a number of factors. The industry is likely to be driven by increasing infant and youth population, rising income levels of middle class and low income class population along with the need to obtain quality education.

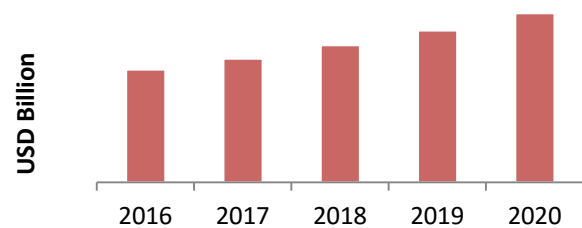
The use of eLearning and smart classes is expected to spread in the education market as an effective medium of a more engaging and interactive learning in all levels of education. The e-learning market share is expected to increase to ~% by 2020 from ~% in 2015.

The vocational and technical education market in Brazil is expected to witness a steady growth in terms of revenues and enrollments in the coming years. This growth will be attributed to the increase in number of enrollments in vocational and technical institutions.

On account of the above factors, Brazil education industry is estimated to witness a growth of ~% CAGR during the period 2016-2020, with private sector educational institutions driving enrollments. The market is expected to cross USD ~ million by 2020.

It is anticipated that K-12 will continue to generate the maximum revenue, with a contribution of ~% in terms of revenue in 2020. The second highest contributor to the market revenue would be vocational and technical education with a share of ~% in the revenue by 2020.

**Figure: Brazil Education Market Future Outlook and Projections by Revenue in USD Billion, 2016-2020**



### KEY FACTORS CONSIDERED IN THE REPORT

- Comprehensive analysis of Brazil Education market and its segments
- Listed major players and their competitive landscape
- Identified major industry developments in last few years and assess the future growth of the industry
- Identified external factors affecting growth of the market
- Regulatory framework help to understand investment opportunities and complexity involved

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