Fact Sheet

Overview of Investments in Infrastructure and Transport in Brazil

- Since 2004, Brazil has operated under a **regulatory framework for Public–Private Partnerships (PPP)**, including the Federal General Concessions Law (1995) and the Federal PPP Law (2004). These laws set rules for contract structure, and outline the rights and responsibilities of both government and concessionaires.
- In 2024, this framework was strenghtened with the approval by the Chamber of Deputies of the **new bill on the General Concessions Law (7063/2017)**, enhancing legal certainty and investor confidence.
- The bill **expands dispute-resolution mechanisms**, including the creation of arbitration panels and technical committees.

Updates to Brazil's General Concession Law (Bill 7063/2017)

- Greater flexibility in revenue generation;
- Improved risk-sharing between concessionaires and the government;
- Expansion of the types of guarantees companies may offer;
- Automatic tariff adjustments in certain situations;
- Streamlined mechanisms for financial rebalance of contracts;
- Faster transfer of control of concessionaires in specific cases;
- Permission for concessionaires to suspend services when the government fails to meet its obligations.

Expected future concessions

Area	Projected Investments (USD billions)	Number of Projects Under Evaluation
Highways	53.94	77
Railways	31.57	12
Urban Mobility	21.60	39
Sanitation	20.93	23
Ports	4.02	38
Social Infrastructure	3.16	139
Airports	2.02	63
Solid Waste	1.16	23
Adm. Infrastructure	1.04	34
Others	0.39	8
Electricity	0.24	12
Public Lighting	0.17	21
Communications	0.04	6
Total	**140.28**	**495**

Source: ABDIB, 2024.

Currency rate: USD 1.00 = BRL 5.35.

- The new concessions framework opens the way for **495 projects totaling USD 140.28 billion,** with strong opportunities for private investment across several sectors.
- **Around 95% of this investment pipeline aligns with EU Global Gateway priorities**, especially in transport (Highways, Railways, Urban Mobility, Ports, Airports), climate and energy (Solid Waste, Public Lighting, and Electricity), health (Sanitation), and digital sectors (Communications).
- Railways, urban mobility, ports, and solid waste stand out as **core contributors to Brazil's decarbonization.**

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- Brazil's infrastructure investment rate is **2.2% of GDP.** The country needs to double this rate over the next 10 years to meet its infrastructure demands.
- This means **Brazil will require updated investments totaling USD 94.02 billion** in transport, energy, communications, and sanitation.

Sector	Investment Executed (2024)**		Investment Needed	
	BRL Billions	in GDP%	BRL Billions	in GDP%
Transport/Logistics	11.78	0.54	49,42	2.26
Electrical Energy	22.30	1.02	18.37	0.84
Telecommunications	8.04	0.37	16.62	0.76
Sanitation	6.35	0.29	9.85	0.45
Total	**48.47**	**2.22**	**94.26**	**4.31**

*Estimates. Updated by the 2024 CPI (estimated). Does not include the oil and gas sector or social infrastructure (health, education, leisure).
This data was a projection for 2024. **Source: ABDIB, 2024. **Currency rate**: USD 1.00 = BRL 5.35.

A Global Perspective: World Bank Infrastructure Investments

- Over the past five years, the World Bank has committed more than **USD 13 billion to expand renewable energy generation. Two-thirds** of this funding supports **transmission and distribution infrastructure.**
- Co-financing for World Bank projects has expanded sharply, reaching **a record USD 7.6 billion in FY2025. Energy & Extractives and Transport** were the two main sectors in the last five years, receiving USD 3.5 billion and USD 3.4 billion respectively.[1]

Transport overview

- With an active transport portfolio exceeding USD 34 billion, the World Bank is the **largest global provider of development financing for transport.**
- This transport portfolio covers all major modes: roads, urban mobility, rail, ports, airports, and waterways.

1 See how to become a co-financier with the World Bank.

Brazil Overview

- Brazil is a major destination for World Bank financing, currently receiving **USD 8.78 billion across 52 active projects**.
- Of these, energy and mining account for USD 553.2 million across 10 projects, while **transport accounts for nearly USD 2.0 billion across 13 projects** — almost 6% of the Bank's global transport portfolio.
- Under the Country Partnership Framework (CPF) 2024–2028, Brazil is expected to receive USD 2 billion per year from the IBRD and USD 5 billion from the IFC, which **could reduce the country's infrastructure investment gap by at least 56%.**
- Brazil is in the second group of countries with the highest volume of co-financed investment with the World Bank.

Results of CEBRI's Energy Transition Program – Phase 2 (PTE2) for the transport sector

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About PTE2

The Energy Transition Program (PTE) is a collaborative initiative led by CEBRI, in partnership with the Inter-American Development Bank (IDB), the Energy Research Office (EPE) and the National Bank for Economic and Social Development (BNDES), which aims to identify priority sector-oriented actions for Brazil to become carbon neutral by 2050. To achieve this, the Program used the integrated modeling approaches developed by Cenergia/COPPE/UFRJ, FIPE/USP and MRTS/USP — supported by extensive multistakeholder consultations.

In its Phase 2, it updates and deepens the normative decarbonization scenarios developed in Phase 1, enabling an understanding of what it means for Brazil to reach net-zero emissions by 2050. The study focuses on five key areas: AFOLU, Industry, Energy, Cities, and Transport.

The study recommends accelerating strategic transport infrastructure projects — including rail and waterway improvements — with a focus on expanding export corridors and interregional connections that reduce reliance on long-distance road transport.

Key findings of the decarbonization roadmap for freight transportation

Short Term (2025–2030)

- Despite the challenges of electrification, initial shifts begin to emerge.
- Manufacturers launch hybrid/electric trucks for urban deliveries and short-distance routes;
- Efficiency gains occur through improved transport infrastructure (paving, intermodal terminals, etc.).

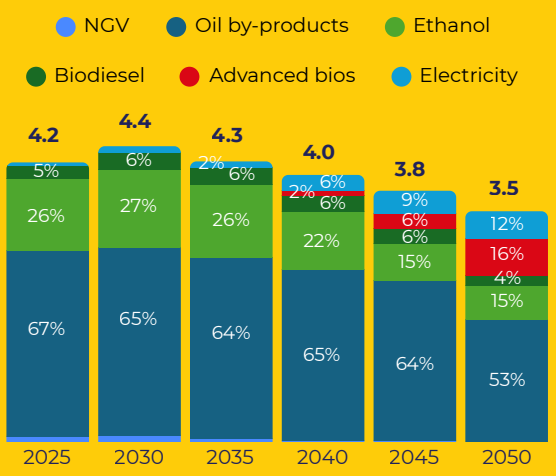
Medium Term (2030–2040)

- Pilot projects for ethanol- and hydrogen-fuel-cell trucks for longer routes begin to appear;
- Logistics become more efficient as the railway network expands its share in freight services;
- Electric urban delivery vehicles (VUCs) become relevant by 2040.

Long Term (2040–2050)

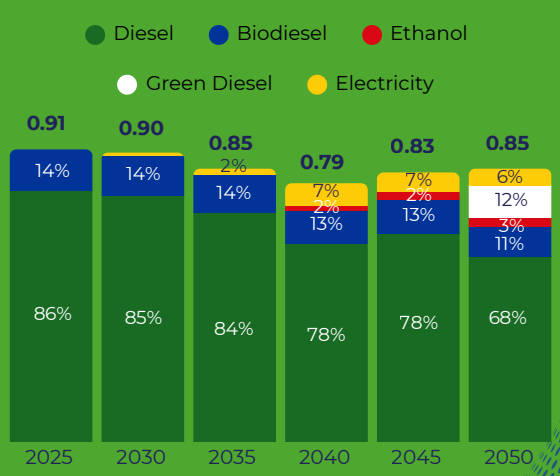
- The sector's energy demand grows faster than the efficiency gains driven by GDP;
- Restructuring of the national transport matrix, promoting a shift of cargo to high-capacity, low-emission modes (waterways, railways, and cabotage).

Total Energy Consumption in Transportation (EJ)



*Both graphs refers to Brazil Transition (BT) scenario.

Total Energy Consumption in Freight Transportation (in EJ)*



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- **Authors & Design:** Fernanda Cimini (CEBRI), Laís Ramalho (CEBRI) and José Ricardo Araujo (CEBRI).

- **Reviewer**: Lea Reichert (CEBRI).