



INDUSTRY
DEVELOPMENT
PROGRAM

STRATEGIC SECTOR ROUTES 2025

EXECUTIVE SUMMARY

CEARÁ

FORTALEZA, THE CAPITAL, HAS A CONCENTRATION OF CLOSE TO 2.6 MILLION PEOPLE, MAKING IT THE COUNTRY'S FIFTH LARGEST CITY. THE CONSISTENT CLIMATE, AVERAGING 28° CELSIUS (82° FAHRENHEIT), AND THE CHARACTERISTIC HOSPITALITY OF THE PEOPLE OF CEARÁ MAKE IT ONE OF THE MOST SOUGHT-AFTER TOURIST DESTINATIONS IN THE COUNTRY.

The population of the State of Ceará is around 8.9 million inhabitants – larger, for instance, than the population of Austria – and spans the 148,825 km² of its 184 municipalities, covering mountainous landscapes, wilderness and 573 km of ravishing coastline.

Among Brazil's 27 states, Ceará has stood out, in recent decades, as having the highest growth, thanks to the ongoing intensive investments in infrastructure as well as joint actions carried out by government, the productive sector and the academy. The common objective is to increasingly innovate and qualify the business environment.

The state's geographic location is highly strategic, being close to the world's largest consumer markets, such as the United States and Europe, with regular cargo ship lines departing from its ports towards destinations in every continent.

Located only 60 km from the capital, Pecém's Industrial and Port Complex stands out because of its offshore port facility, with an infrastructure that receives post-Panamax ships, and is the only Export Processing Zone in operation in the Country. It receives over USD 5 billion in investments in a steelworks complex.

**A WORLD OF OPPORTUNITY AWAITING
PEOPLE SEEKING TO DO BUSINESS.**

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Industry Development Program

The Federation of Industries of the State of Ceará System (FIEC System) embraces the mission of strengthening the industry and driving the state's economic development, stimulating competitiveness, generating new business and reinforcing institutional bonds. One of the most important steps in this direction is to join efforts with all stakeholders in building, in a participatory manner and with a systemic perspective, strategies and tools for actions capable of promoting the economic development of the state.

Under this premise, the FIEC System implemented the **Industry Development Program**, with the objective of contributing to a long-term growth strategy, defining the state's main potential areas and the respective Routes to better avail of these differentials, by way of an articulated debate that included private initiatives, public authorities, the academia, society at large and other support entities, fostering and strengthening innovation and sustainability in corporate strategies.

Projects that make up the Industry Development Program are made up of the following action vectors:

- ◆ **Prospecting the Future for Sector Competitiveness;**
- ◆ **Competitive Intelligence;**
- ◆ **Cooperation and an Environment for Development.**

The foundation for the program was established in 2014, with the execution of the project **Sectors Bringing Future Prospect to the State of Ceará**, with the objective of identifying sectors and areas bringing future prospects for the state's industry and which are capable of making it competitive at national and international levels within a ten-year horizon. The sectors and areas were grouped in 3 categories, as shown in the illustration below.

Sector Drivers of Regional Development

Apparel
Furniture
Electric-metal-mechanics
Non-metallic Minerals
Tourism

Strategic Sectors and Areas

Construction
Footwear and Leather
Creative Economy
Sea-Based Economy
Agri-food
Health

Transversal Sectors and Areas

Water
Biotechnology
Energy
Logistics
Environment
Information and Communication Technology (ICT)

In providing continuity for the Sectors Bringing Future Prospect to the State of Ceará, with the vision of reinforcing the state's industrial web and to carry on with the process of promoting competitiveness, the FIEC System is implementing the **Strategic Sector Routes** project.



Strategic Sector Routes – 2025

In order to optimize the delivery process, the 17 sectors identified were grouped into 13 strategic routes, as shown below:



Water



Biotechnology



Construction and Non-metallic Minerals



Creative Economy and Tourism



Sea-based Economy



Electric-metal-mechanics



Energy



Agri-food



Logistics



Environment



Consumption goods: Footwear and Leather, Apparel, Furniture



Health



Information and Communication Technology

THE **STRATEGIC SECTOR ROUTES — 2025** IS AN INITIATIVE OF THE FIEC SYSTEM WHICH AIMS AT DRAFTING ROADMAPS, I.E., MAPS DEFINING ROUTES TO BE COVERED IN ORDER TO ACHIEVE, IN UP TO 10 YEARS, THE POTENTIAL PERCEIVED IN EACH OF THE SECTORS AND AREAS IDENTIFIED IN THE SECTORS BRINGING FUTURE PROSPECTS, CONSIDERED TO BE THE MOST PROMISING FOR CEARÁ'S INDUSTRY WITHIN THE 2025 HORIZON.

METHODOLOGY

Backed by the assumptions of the Strategic Prospect and deploying the Roadmapping method, delivering the work of drafting the Strategic Sector Routes – 2025 comprised the following stages:














- ◆ Social-economic studies and trends
- ◆ Sectors specialist panels
- ◆ Electronic queries
- ◆ Consolidation of panel outcomes
- ◆ Dissemination of publications and articulation

Within this Strategic Routes cycle, which started in 2015, seven publications were released in 2016 – Water, Construction and Non-metallic Minerals, Electric-metal-mechanics, Energy, Logistics, Health Services and Information and Communication Technology. To date, close to 350 specialists have been mobilized coming from the government, private initiative, third sector and the academia, who proposed approximately 3000 short-term (2015-2017), medium-term (2018-2021) and long-term (2022-2025) actions.

The release of the routes for Agri-food, Biotechnology, Creative Economy and Tourism, Sea-based Economy, the Environment and Consumer Goods sectors is foreseen for the second semester of 2017.



SCHEDULE

Sectors		Base Studies	Specialist Panels	Interviews and systematization of outcomes	Release
	ENERGY	✓	✓	✓	✓
	ELECTRIC-METAL-MECHANICS	✓	✓	✓	✓
	CONSTRUCTION AND NON-METALLIC MINERALS	✓	✓	✓	✓
	INFORMATION AND COMMUNICATION TECHNOLOGY	✓	✓	✓	✓
	HEALTH	✓	✓	✓	✓
	LOGISTICS	✓	✓	✓	✓
	WATER	✓	✓	✓	✓
	AGRI-FOOD	✓	✓	✓	September 2017
	BIOTECHNOLOGY	✓	✓	April 2017	September 2017
	CONSUMPTION GOODS: FOOTWEAR AND LEATHER, APPAREL, FURNITURE	✓	✓	April 2017	September 2017
	SEA-BASED ECONOMY	✓	April 2017	August 2017	September 2017
	ENVIRONMENT	✓	April 2017	August 2017	September 2017
	CREATIVE ECONOMY AND TOURISM	✓	April 2017	August 2017	September 2017

Results

Energy Route



Electric-metal-mechanics Route



Construction and Non-metallic Minerals Route



Logistics Route



Health Route



Information and Communication Technology Route



Water Route





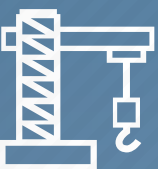
ENERGY ROUTE

Visions	Critical Factors	Actions	Key Technologies
<p>WIND ENERGY GENERATION:</p> <p>Leader in innovation, attraction and development of business for the entire wind power generation chain</p>	<p>State Policies</p> <p>Financing</p> <p>Productive Chain</p> <p>Human Resources</p>	<p>122 actions.</p> <p>Highlights: Investment opportunities in wind energy generation and supply of components</p>	<ul style="list-style-type: none"> - Energy Storage - Energy Efficiency - Distributed Micro and Mini-generation - Nanotechnology - New Materials - Smart Grid - Lining Technology
<p>SOLAR ENERGY GENERATION:</p> <p>National hub for excellence in innovation, attraction and development of business for the entire solar energy chain</p>	<p>State Policies</p> <p>RD&I</p> <p>Market</p> <p>Human Resources</p>	<p>109 actions.</p> <p>Highlights: Potential for cooperation in quartz refinery and solar panel assembly industries</p>	<ul style="list-style-type: none"> - Energy Storage - Photovoltaic Cell - Thermal Solar Collector - Energy Efficiency - Distributed Micro and Mini-generation - Nanotechnology - Smart Grid
<p>ENERGY EFFICIENCY:</p> <p>National reference in energy efficiency with focus on productive processes</p>	<p>State Policies</p> <p>Competitiveness</p> <p>Communication and Marketing</p> <p>Human Resources</p>	<p>111 actions.</p> <p>Highlights: Attraction of investments and partnerships for development and production of efficient equipment and solutions</p>	<ul style="list-style-type: none"> - Diversification of Energy Matrix - Energy Efficiency - Waste Management - Light Emitting Diode (LED) - Smart Grid - Hybrid Power System - Information and Communication Technology (ICT)
<p>BIOMASS:</p> <p>National reference in the use of biomass, solid waste and effluents in energy generation</p>	<p>State Policies</p> <p>Financing</p> <p>Culture</p> <p>Technology and Innovation</p>	<p>121 actions.</p> <p>Highlights: Use of biomass, urban solid waste and microalgae</p>	<ul style="list-style-type: none"> - Biofuel - Bio-digestor - Biogas - Biomass - Biotechnology - Energy Efficiency - Distributed Micro and Mini-generation - Nanotechnology - Energy Production from Sanitary Landfills - Smart Grid
<p>GAS:</p> <p>Ceará, a state with high availability of gas for industrial purposes</p>	<p>State Policies</p> <p>Financing and Investment</p> <p>Market</p> <p>Infrastructure</p>	<p>84 actions.</p> <p>Highlights: Opportunities for public-private cooperation in establishing a regasification center</p>	<ul style="list-style-type: none"> - Liquefied Natural Gas regasification Centers (LNG) - Energy Efficiency - Pipeline Grid - Nanotechnology - Information and Communication Technology (ICT)



ELECTRIC-METAL-MECHANICS ROUTE

Visions	Critical Factors	Actions	Key Technologies
<p>APPLIED RESEARCH, HUMAN DEVELOPMENT AND TECHNOLOGICAL INNOVATION:</p> <p>Electric-metal-mechanics hub of excellence in applied research, human development and technological innovation</p>	<p>Intellectual Capital Industrial Policy Integration of Players and Entrepreneurship Research, Development and Innovation</p>	<p>134 actions. Highlight: Potential for cooperation in RD&I with local companies</p>	<ul style="list-style-type: none"> - M2M Communication - Home Automation - Energy Efficiency - Onboard Electronics - Open Innovation - Modeling and Simulation - 3D Printing - Industry 4.0 - Nanotechnology - New Materials - Virtual and Augmented Reality - Robotics and Automation - Cleaner Production Technologies - Surface Treatment - Electric or Hybrid Vehicles
<p>GOODS AND SERVICES:</p> <p>Electric-metal-mechanics Sector provider of internationally competitive solutions in goods and services</p>	<p>Technological Development Public Policies International Trade Planning and Management</p>	<p>129 actions. Highlights: Interest in closing international agreements to meet the needs of the productive chain</p>	<ul style="list-style-type: none"> - Environmental Certification - Customization - Energy Efficiency - Multifunctional Equipment - Waste Management - High Speed Machining - 3D Printing - Industry 4.0 - Micro-machining - Modeling and Simulation - Robotics and Automation - Smart Appliances - Management Software - Cleaner Production Technologies
<p>PRODUCTIVE CHAIN:</p> <p>Electric-metal-mechanics productive chain integrated and driven towards the global market</p>	<p>Governance Human Resources Industrial Policy</p>	<p>131 actions. Highlights: Attraction of investments to meet the demand of the steelworks complex located in the Export Processing Zone (EPZ)</p>	<ul style="list-style-type: none"> - Densification of the Chain - Coopetition - Customization - Industry 4.0 - Open Innovation - Flexible and Reconfigurable Production Systems - Management Software - University-company









CONSTRUCTION AND
NON-METALLIC MINERALS ROUTE

Visions	Critical Factors	Actions	Key Technologies
<p>CONSTRUCTION OF BUILDINGS:</p> <p>Excellence in the Construction of Buildings with productivity, innovation and sustainability</p>	<p>Public Policies Market Culture RD&I and Technology Human Resources</p>	<p>127 actions.</p> <p>Highlights: Cooperation in reuse of materials, sustainable methods and deployment of information technologies in construction</p>	<ul style="list-style-type: none"> - Building Information Modeling (BIM) - Sustainable Constructions - Home Automation - Construction Waste Management - 3D Printing - Nanotechnology - Augmented Reality - Virtual Reality - Smart Grid - Robotics - Modular Construction System - Clean Technologies
<p>INFRASTRUCTURE WORKS:</p> <p>Reliability and efficiency in the execution of Infrastructure Works in addressing the needs of society</p>	<p>State Policies Project Management Public Administration Technology and Education</p>	<p>124 actions.</p> <p>Highlights: Public-private partnerships in logistics infrastructure works</p>	<ul style="list-style-type: none"> - Building Information Modeling (BIM) - Construction Waste Management - Nanotechnology - Augmented Reality - Virtual Reality - Robotics - Clean Technologies
<p>SPECIALIZED SERVICES IN CONSTRUCTION:</p> <p>Provider of innovative and efficient solutions in specialized construction services</p>	<p>Public Policies Human Resources Market RD&I and Technology</p>	<p>113 actions.</p> <p>Highlights: Fostering startups with services targeted at construction companies</p>	<ul style="list-style-type: none"> - Building Information Modeling (BIM) - Robotics
<p>NON-METALLIC MINERALS:</p> <p>Production hub of Non-metallic Minerals with innovation, logistics infrastructure, customization and sustainability</p>	<p>Logistics Infrastructure Public Policies RD&I</p>	<p>127 actions.</p> <p>Highlights: Cooperation and processes for super-exotic granite, phosphate-based products and the use of the quartz reserves for the production of silicon</p>	<ul style="list-style-type: none"> - Use of Waste Products - Energy Efficiency - 3D Printing - Inter-modality and Multimodality - Robotics - Nanotechnology - Clean Technologies



LOGISTICS ROUTE

COMPETITIVE AND SUSTAINABLE LOGISTICS WITH INTEGRATION OF MODALS, UPSCALING THE STATE'S DEVELOPMENT POTENTIAL

Vision	Segments	Critical Factors	Actions	Key Technologies
	AIRWAYS 	Infrastructure Human Resources Public Policies Market	77 actions. Highlights: Partnership in management of the Fortaleza International Airport	
	WATERWAYS 	Infrastructure Human Resources Public Policies Market	99 actions. Highlights: Opportunities for cooperation in planning and management of the Industrial and Port Complex of Pecém (CIPP)	
	PIPELINES 	Infrastructure Human Resources Public Policies Market	69 actions. Highlights: Opportunity for establishing and in land re-gasification center and tank yard at CIPP	
	RAILWAYS 	Infrastructure Human Resources Public Policies Market	68 actions. Highlights: Potential for multimodal logistics	
	PRODUCTS AND SERVICES 	Infrastructure Human Resources Public Policies Technology	72 actions. Highlights: Partnerships in coastal navigation and other logistics services	
	ROADWAY 	Infrastructure Human Resources Public Policies Market	100 actions. Highlights: Public-private partnerships (PPPs) in road construction	

- Automation and Robotics
- Big Data
- Coastal Cabotage
- Communication M2M
- Coopetition
- Mass Customization
- Multichannel Distribution
- Intelligent Tags
- Logistics Hubs
- 3D Printing
- Industry 4.0
- Industrialization of Construction
- Inter-modality and Multimodality
- Physical Internet
- Urban Logistics
- Reverse Logistics
- Predictive Maintenance
- New Materials
- Fourth-party delegation
- Augmented reality
- Logistics Intelligence Systems
- Management Software



HEALTH ROUTE

Visions	Critical Factors	Actions	Key Technologies
<p>PERSONAL HYGIENE, COSMETICS AND PERFUMERY:</p> <p>Brazilian leadership in personal hygiene, cosmetic and perfumery products developed in an innovative and sustainable manner</p>	<p>Human Resources RD&I Market State Policies</p>	<p>125 actions. Highlights: Use of local biodiversity</p>	<ul style="list-style-type: none"> - Biodiversity Assets - Advances in Cosmetics Packaging - Biotechnology - Certification - Natural Cosmetics - Product Innovation - Nanotechnology - HPCP Market Niches - Social-environmental Responsibility in the Productive Chain - Cleaner Production Technologies
<p>BIOPHARMACEUTICALS, PHARMACEUTICAL CHEMISTRY AND PHARMACEUTICALS:</p> <p>Integrated, sustainable and competitive biopharmaceutical and pharmaceutical chemistry hub</p>	<p>Human Resources RD&I Productive Chain and Logistics State Policies</p>	<p>140 actions. Highlights: Establishment of a start-up center and multiuser laboratories focused on biopharmaceuticals</p>	<ul style="list-style-type: none"> - Biodiversity Assets - Bioethics and Bio-security - Biotechnology - Pharmaceutical Genetics - Nanotechnology - Social-environmental Responsibility in the Productive Chain - Cleaner Production Technologies
<p>INSTRUMENTS, MATERIALS AND EQUIPMENT FOR HEALTH SERVICES:</p> <p>Health Services Instrument, Materials and Equipment Industry recognized for its innovation, entrepreneurship and integration of the productive chain</p>	<p>Human Resources RD&I and Technology Market State Policies</p>	<p>100 actions. Highlights: Joint development of applications in biotechnology convergence, in diagnostics equipment, transplants and high accuracy monitoring</p>	<ul style="list-style-type: none"> - Densification of the Chain - Biotechnology - NBIC Convergence - Coopetition - Health Monitoring Devices - Medical-hospital Equipment for Health Services Homecare - Open Innovation - Nanotechnology - Robotics - University-Company
<p>INFORMATION AND COMMUNICATION TECHNOLOGY APPLIED TO HEALTH SERVICES:</p> <p>National reference in Information and Communication Technology applied to Health Services</p>	<p>Human Resources RD&I and Technology Market State Policies</p>	<p>97 actions. Highlights: development of RD&I projects in emerging technologies</p>	<ul style="list-style-type: none"> - Big Data - Health Monitoring Devices - E-card - 3D Printing - Internet of Things (IoT) - M-health - Digital Odontology - Virtual and Augmented Reality - Health 4.0 - Telemedicine - Mobile Technologies - Wearable Technologies



INFORMATION AND COMMUNICATION TECHNOLOGY ROUTE

Visions	Critical Factors	Actions	Key Technologies
<p>INDUSTRIAL APPLICATIONS:</p> <p>National reference in Information and Communication Technology applied to sustainable industrial development</p>	<p>Human Resources</p> <p>State Policies</p> <p>RD&I</p> <p>Market</p>	<p>87 actions.</p> <p>Highlights: Cooperation opportunities in applications targeted at Industry 4.0</p>	<ul style="list-style-type: none">- Big Data- Cloud Computing- M2M Communication- Energy Efficiency- 3D Printing- Industry 4.0- Open Innovation- Internet of Things (IoT)- Virtual and Augmented Reality- Advanced Robotics- Cleaner Production Technology
<p>ECONOMY OF SERVICES AND OF KNOWLEDGE:</p> <p>Innovative state in the development and integration of Information and Communication Technology for the economy of services and knowledge</p>	<p>Human Resources</p> <p>State Policies</p> <p>RD&I</p> <p>Market</p>	<p>73 actions.</p> <p>Highlights: Joint development for solutions in the Internet of Things and other emerging technologies</p>	<ul style="list-style-type: none">- Advances in Software Development- Big Data- Bring Your Own Device- Cyber security- Cloud Computing- Omnipresent Computing Services- Convergence- Coopetition- Customization- Home Automation- Wireless Energy- 3D Printing- Brain-Computer Interface- Internet of Things (IoT)- Natural User Interface (NUI)- Virtual and Augmented Reality- Smart Appliances- Wearable Technologies
<p>MOBILITY, CONNECTIVITY AND SECURITY:</p> <p>Provider of solutions for high availability and high connection quality demands</p>	<p>Human Resources</p> <p>State Policies</p> <p>RD&I</p> <p>Infrastructure</p>	<p>93 actions.</p> <p>Highlights: Investment opportunities based on the high availability and connection quality resulting from the undersea optic cable grid</p>	<ul style="list-style-type: none">- Advances in Software Development- Big Data- Cyber Security- Cloud Computing- Omnipresent Computing Services- Wireless Power- Artificial Intelligence- Virtual and Augmented Reality- Robotics- Cleaner Production Technologies



WATER ROUTE

Visions	Critical Factors	Actions	Key Technologies	
<p>WATER SERVICES:</p> <p>Ceará with water services security – quality water in quantity and economic development</p>	<p>Human Resources State Policies Management RD&I and Technology</p>	<p>129 actions. Highlights: Establishment of a desalinization plant at the CIPP</p>	<ul style="list-style-type: none"> - Precision Agriculture - Certification and Seals - Condensers - Technological Convergence - Desalinization - Echo-efficient Hydro/Hydraulic Equipment - Intelligent Irrigation - Nanotechnology - Reuse 	
<p>USE OF WATER:</p> <p>Reference in the sustainable use of water and the deployment of eco-efficient technologies and systems</p>	<p>Education and Culture State Policies Sustainability RD&I and Technology</p>	<p>124 actions. Highlights: Cooperation for the development and deployment of technologies for the sustainable use of water</p>	<ul style="list-style-type: none"> - Precision Agriculture - Water 4.0 - Aquaponics - Big Data - Certification and Seals - M2M Communication - Technological Convergence - Multi-trophic Cropping - Energy Efficiency - Echo-efficient Hydric/Hydraulic Equipment - Strategies to Prevent Water Loss through Evaporation - Nanotechnology - Reuse - Telemetry - Water-pinch 	
<p>NEW INDUSTRIES FOR WATER RESTRICTION CONTEXTS:</p> <p>State where economic sectors develop, while making intelligent use of water resources</p>	<p>State Policies Management Market and Competitiveness RD&I and Technology</p>	<p>113 actions. Highlights: Development of technology, equipment and solutions for the sustainable use of water resources</p>	<ul style="list-style-type: none"> - Precision Agriculture - Water 4.0 - Aquaponics - Automation and Robotics - Big Data - Certification and Seals - Closed Cycle - M2M Communication - Technological Convergence - Desalinization - Echo-efficient Hydric/Hydraulic Equipment - Strategies to Prevent Water Loss through Evaporation - Internet of Things (IoT) 	<ul style="list-style-type: none"> - Intelligent Irrigation - Predictive Maintenance - Nanotechnology - Virtual and Augmented Reality - Social-environmental Responsibility in the Productive Chain - Reuse - Information and Communication Technology (ICT) - Filtration Technologies - Cleaner Production Technologies - Telemetry - Water-pinch - Wetlands

Sector Articulation

The Strategic Sector Routes were built based on strategies to capitalize knowledge stemming from sector specialists, being an important asset in directing the efforts of the government, private initiative, third sector and academia. In this sense, through the implementation of sector master plans, FIEC commits to preserving an ongoing channel of integration with partner entities with the objective of articulating the implementation of the actions planned.

The objective of this articulation project is to contribute by fostering the competitiveness of the strategic sectors of Ceará by means of:

Implementing the sector development strategy with a priority action agenda



Support the establishment of commitments between public and private players in delivering the strategic activities for the segment



Disseminating strategic information for decision-making, product development, delivery of services and planning of sector support institutions



Advisory services to sector governance and leadership by means of projections and in-depth analysis of actions, as well as survey of sector-related initiatives, demand and information



Establishing and monitoring of sector competitiveness indicators and tracking metrics for the implementation of the strategy agenda



Subsidies to match the partner entities service offered to the sector demand levels



INVESTOR SUPPORT



AS PART OF THE MISSION TO STRENGTHEN INDUSTRY AND PROMOTE ECONOMIC DEVELOPMENT IN CEARÁ, THE FEDERATION OF INDUSTRIES OF THE STATE OF CEARÁ (FIEC), THROUGH THE INVESTOR SUPPORT SERVICE, ENCOURAGES AND SUPPORTS SUSTAINABLE OPPORTUNITIES FOR FOREIGN INVESTMENT IN BRAZIL AND, IN PARTICULAR, WITHIN THE STATE OF CEARÁ IN THE DIFFERENT STRATEGIC AREAS OF THE LOCAL ECONOMY.

A TEAM OF QUALIFIED CONSULTANTS OFFERS, TO INTERNATIONAL PARTNERS, STRATEGIC INFORMATION IN DRIVING FEASIBILITY FOR ESTABLISHING BUSINESS IN THE COUNTRY, ALSO RENDERING ARTICULATION WITH PUBLIC AND PRIVATE ENTITIES, BY AGGREGATING DATA AND INFORMATION AIMING AT CONTRIBUTING TO THE ESTABLISHMENT OF PARTNERSHIPS.

Investor Support Service –
International Business Center of Ceará



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