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Agents, robots, and us

How AI reshapes work and skills in Latin America



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At a glance

— **More than half of today's work hours in Latin America could theoretically be automated using artificial intelligence and other existing technologies.** This is similar to what we find in advanced economies. AI-driven agents account for most of the region's automation potential, as they do elsewhere, but Latin America's greater share of physical work means robots play a larger role. These estimates reflect technical feasibility, not a forecast of adoption or job losses.

— **Automation could unlock roughly $450 billion in annual economic value across Latin America by 2030.** Realizing that value will depend on adoption, which our analysis suggests is likely to lag behind that of advanced economies because of lower wages, the higher relative cost of robotics, and differences in organizational readiness.

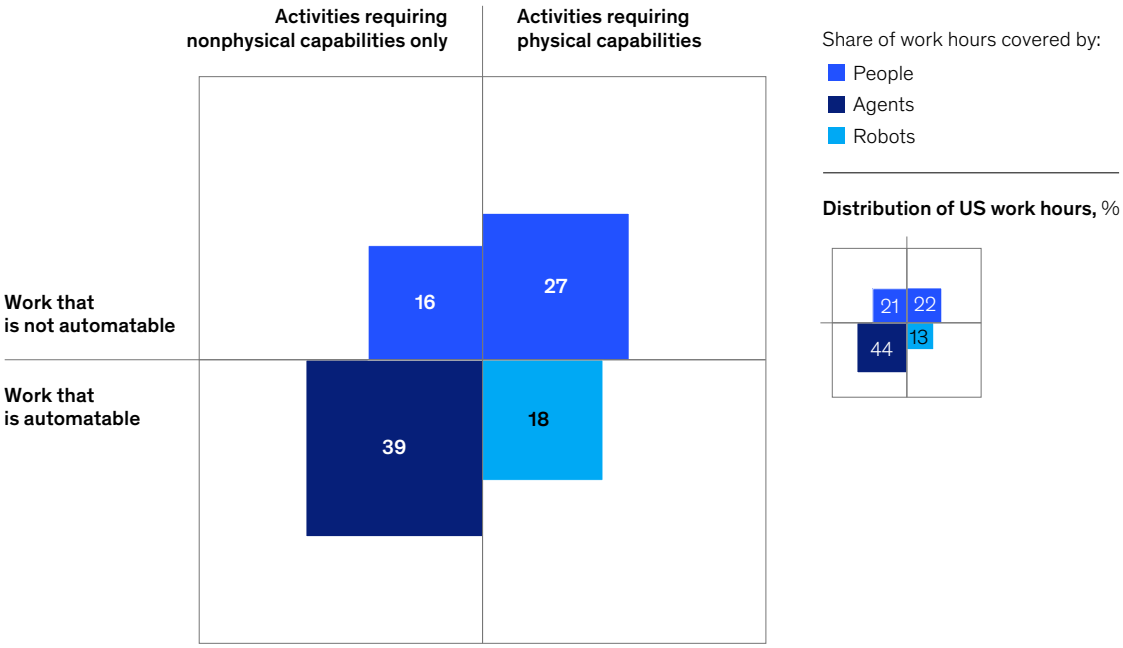
— **Most human skills will endure, even as they are applied differently.** Some 66 percent of the skills sought by Latin American employers today are used in both automatable and non-automatable work. This overlap means skills such as problem-solving, teamwork, and effective communication are more likely to be used in collaboration with AI than replaced by it, at least in the near term.

— **Demand for AI fluency—the ability to use, manage, and create with AI tools—has grown 11-fold in two years, roughly twice as fast as in the United States and Europe.** It is now the fastest-growing skill category in Latin America's labor market.

— **Case studies show that the value of AI comes from redesigning workflows, not technology alone.** Across sectors, companies in Latin America are combining people, agents, and robots to move more quickly, expand coverage, improve decisions, and make previously impractical work possible.

Most work hours in the region are technically automatable, with a larger share of nonphysical work than in developed economies.

Distribution of work hours in Latin America, by technical automation potential,[1] 2024, %



Note: Latin American countries include: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Panama, Peru, and Uruguay.
[1]Automation potential is based on current capabilities of technology to perform human work. Automation potential shown is the late scenario of expert estimates. The early scenario of global technical automation potential ranges from 60 to 70 percent of current work hours.
Source: International Labour Organization; national statistical offices; McKinsey Global Institute analysis

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AI has expanded what machines can do—changing how work gets done everywhere. In Latin America, some 57 percent of current work hours could theoretically be automated using technologies that already exist.[1]

But technical potential is easily misunderstood. It is not a forecast of job losses. Instead, it signals how profoundly work could be reorganized. An important point is that most jobs combine tasks that machines can do with those they cannot. Even as AI-driven agents and robots take on more work, people will continue to exercise judgment, interpret context, build and manage relationships, and remain accountable for outcomes.

Just as important, only part of what is technically feasible is likely to be adopted. That is true in advanced and developing economies alike, but the gap between potential and adoption may be wider in Latin America. Overall, work in the region is more physical than in the United States and Europe—and physical automation often requires robots, which can be more expensive to deploy than agents that perform cognitive work. At the same time, wages are generally lower, weakening incentives to automate.

Yet slower adoption does not imply a lack of innovation. Companies across Latin America are already deploying AI at scale. In some cases, the technology makes work faster, safer, and more efficient. In others, it enables capabilities that would be difficult—or impossible—to achieve through human effort alone. For example, there are AI agents that listen to thousands of customer service calls and help representatives identify sales opportunities in real time. There are also AI systems that help airlines evaluate operational disruptions and identify the least disruptive response within minutes.

The variety of these use cases reflects the diversity of the region itself. There is no single Latin American automation story. Latin America includes service-oriented economies such as Costa Rica and Panama, where AI-enabled agents may play a larger role; larger, more diversified economies such as Brazil and Mexico, where agents and robots may advance together; and economies such as Bolivia, Ecuador, and Honduras, where agriculture accounts for a larger share of work.

These differences will shape how quickly technologies spread, how work changes, and which skills workers need as they increasingly work alongside agents and robots. The transition is already visible. In Latin American labor markets where job-posting data are available, demand for AI-related skills is growing roughly twice as fast as in advanced economies.

Latin America faces slowing population growth, aging workforces in many countries, and a long-standing productivity challenge. Raising living standards will increasingly depend on how effectively people and technology work together.

The economic stakes are enormous. By 2030, automation could unlock about $450 billion in annual value across the 15 Latin American countries analyzed.

Building on recent McKinsey Global Institute research on the United States and Europe, this report examines how automation could reshape work and skills in Latin America, with lessons for developing and middle-income economies more broadly.

Even where adoption may be slower overall, organizations are already finding creative ways to combine people, agents, and robots. How broadly those approaches spread will help determine how much of Latin America's automation potential is ultimately realized.

Country dashboards

The dashboards below offer a country-specific view of automation potential, demand for AI-related skills, and MGI's Skill Change Index (SCI), which measures how exposed skills are to automation. They cover five large, data-rich labor markets where job-posting and skills data are robust enough to support comprehensive analyses. The full report follows.



Argentina



Brazil



Chile



Colombia



Mexico

CHAPTER ONE

Work will increasingly involve collaboration among people, agents, and robots

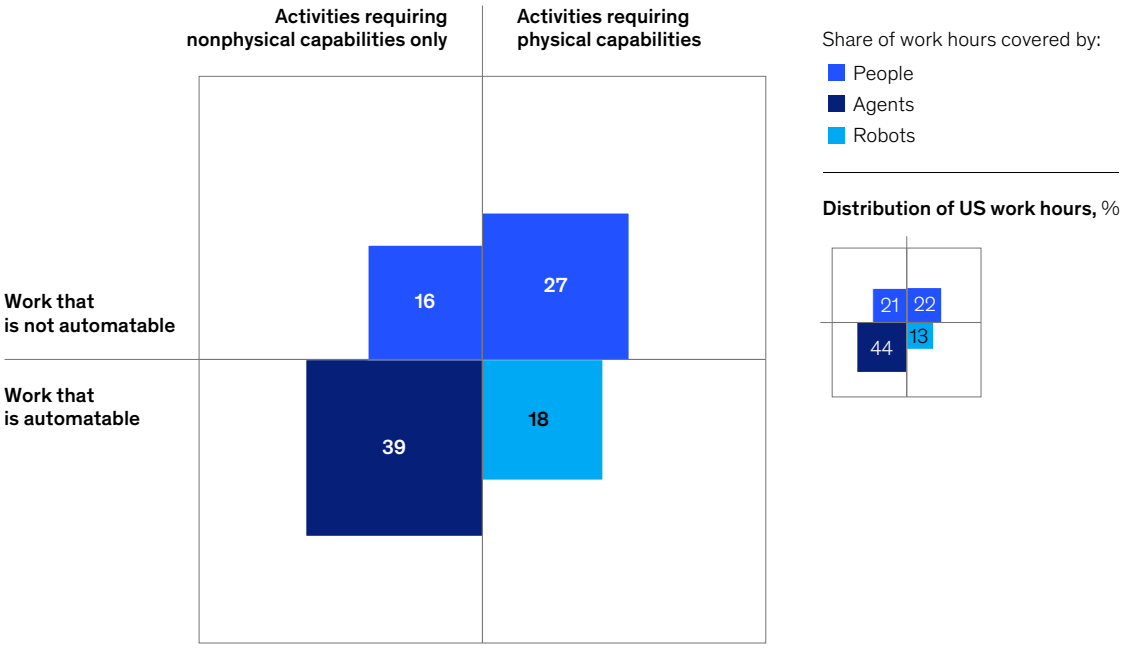
Automation potential offers a glimpse of how work could be reorganized in the years ahead. Across the 15 Latin American countries analyzed, 57 percent of today's work hours could theoretically be automated using existing technologies—39 percent through agents and 18 percent through robots.[2] The remaining work hours cannot currently be automated because they involve judgment, contextual reasoning, or work performed in unpredictable physical environments where machines do not yet operate reliably (Exhibit 1).

In this report, we use "agents" and "robots" as broad, practical terms for technologies that automate nonphysical and physical work, respectively.[3] Estimates of automation potential reflect what is technically feasible, not what organizations will necessarily adopt in practice, which depends on cost considerations, organizational readiness, and other factors. Nor do these estimates capture how work itself may evolve as activities are redesigned, new tasks emerge, and new occupations appear.[4] The top-line figures also mask meaningful differences within the region in the balance between agent- and robot-led automation.

Exhibit 1

Most work hours in the region are technically automatable, with a larger share of nonphysical work than in developed economies.

Distribution of work hours in Latin America, by technical automation potential,[1] 2024, %



Note: Latin American countries include: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Panama, Peru, and Uruguay.
[1]Automation potential is based on current capabilities of technology to perform human work. Automation potential shown is the late scenario of expert estimates. The early scenario of global technical automation potential ranges from 60 to 70 percent of current work hours.
Source: International Labour Organization; national statistical offices; McKinsey Global Institute analysis

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Robots play a larger role in Latin America than in advanced economies

Automation potential in Latin America is broadly similar to that in the United States and Europe, despite important differences in economic structure and work composition.

Even within Latin America, where economies differ substantially, the share of today's work hours that could be automated is relatively tightly clustered, with most countries falling between 55 and 59 percent. Panama sits below that range, at 53 percent.

The larger variation is in the automation mix. Agents account for most automatable work across Latin America, as they do in the United States and Europe. But robots account for a larger share of automation potential in Latin America because physical labor occupies nearly half of all work hours in the region, compared with roughly a third in the United States and Europe (Exhibit 2).

Within Latin America, Bolivia, Ecuador, and Honduras have particularly large shares of employment in farming, construction, transportation and material moving, and other physically intensive sectors.

Argentina, Uruguay, and Chile, by contrast, have more office-based work and therefore greater potential for agent-led automation. Brazil, Colombia, Mexico, and Panama sit closer to the middle in terms of composition, with more balanced mixes of physical and nonphysical work, including office, service, production, and logistics roles.

We return to these country groupings in the pathway section below.

Exhibit 2

Almost half of Latin America's work hours require physical capabilities, a higher proportion than in developed economies.

Distribution of physical and nonphysical work in Latin America, by occupation group[1]

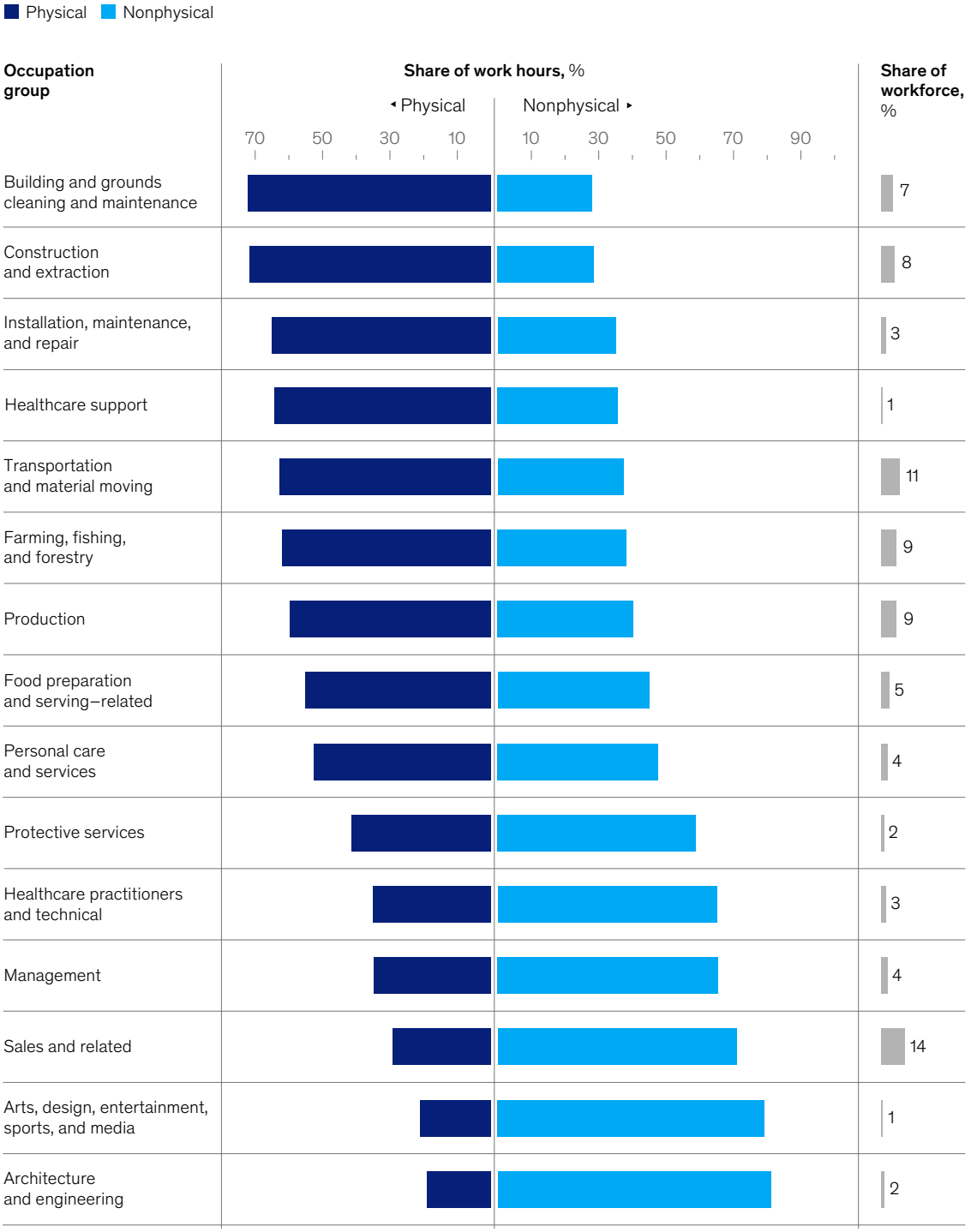
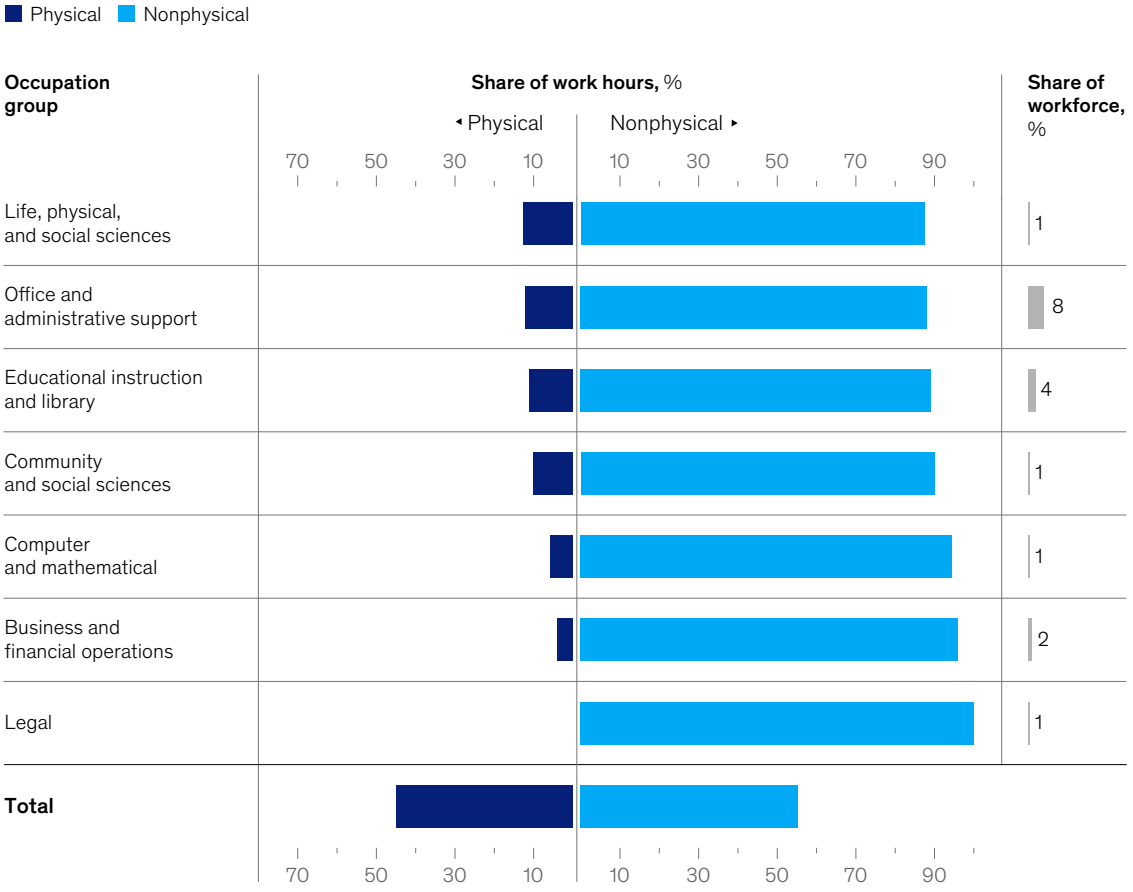


Exhibit 2 (continued)

Almost half of Latin America's work hours require physical capabilities, a higher proportion than in developed economies.

Distribution of physical and nonphysical work in Latin America, by occupation group[1]



[1]Includes Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Panama, Peru, Uruguay.
Source: National statistical offices; O*NET; McKinsey Global Institute analysis

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Jobs fall into seven archetypes combining people, agents, and robots

Technical automation potential varies significantly across jobs. To understand how work may be reorganized, we group roughly 800 occupations into seven archetypes that reflect the relative role of people, agents, and robots (Exhibit 3).

People-centric roles account for about 36 percent of employment across Latin America. These occupations rely heavily on human judgment, interpersonal interaction, and adaptability in unstructured physical or social environments. Examples range from janitors and healthcare practitioners to general managers.

Exhibit 3

Over a third of employment is concentrated in people-centric occupations.

Distribution of Latin American work hours across seven occupation archetypes, by technical automation potential, 2024, %

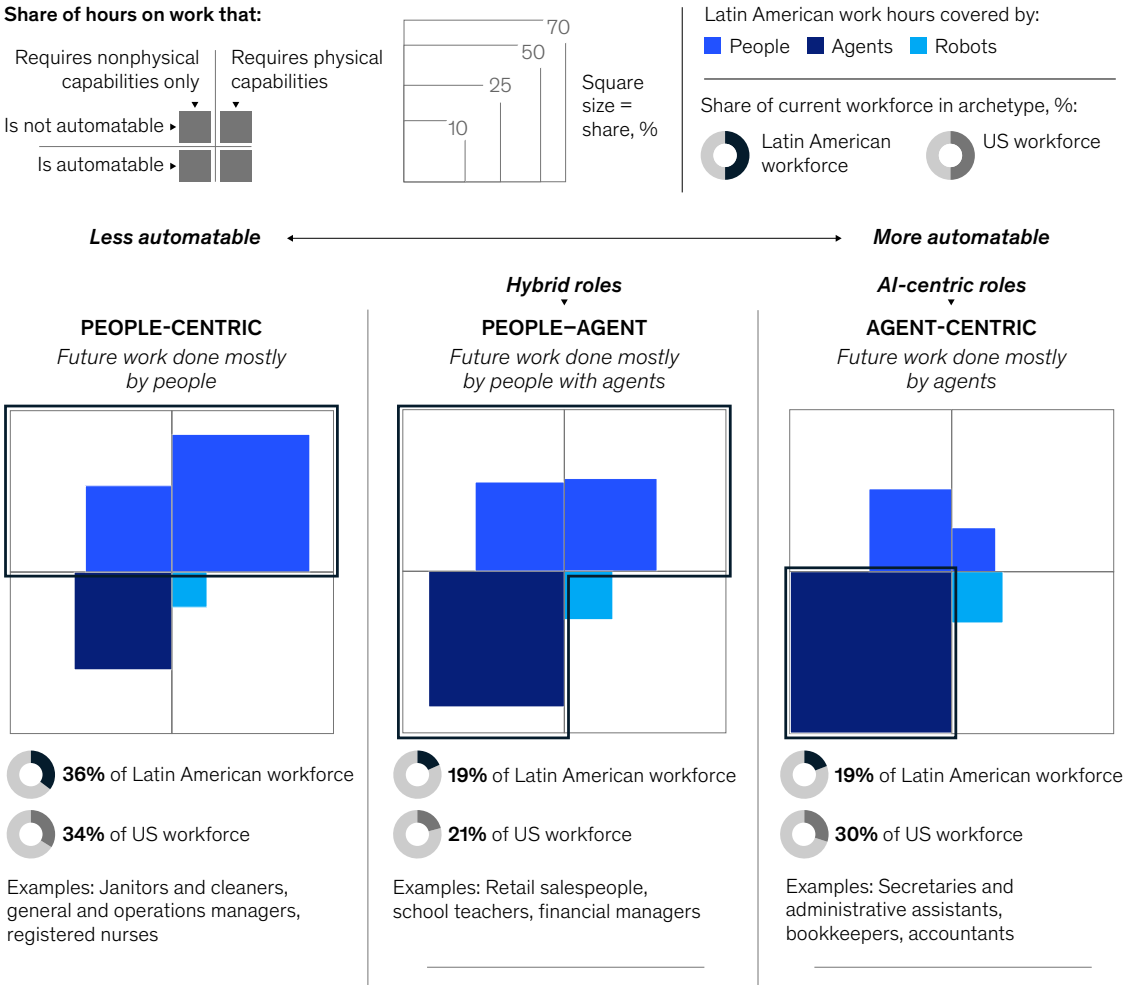


Exhibit 3 (continued)

Over a third of employment is concentrated in people-centric occupations.

Distribution of Latin American work hours across seven occupation archetypes, by technical automation potential, 2024, %

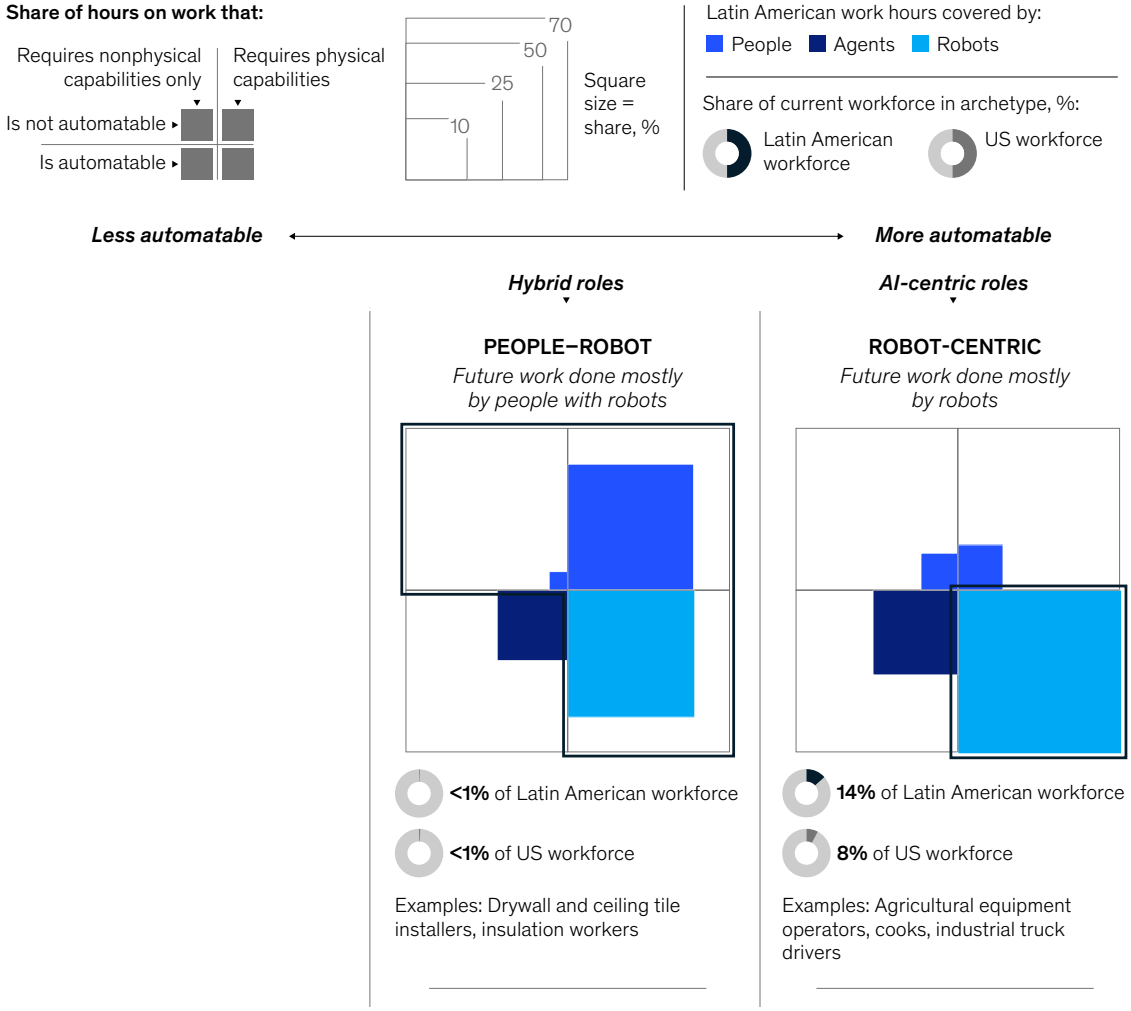
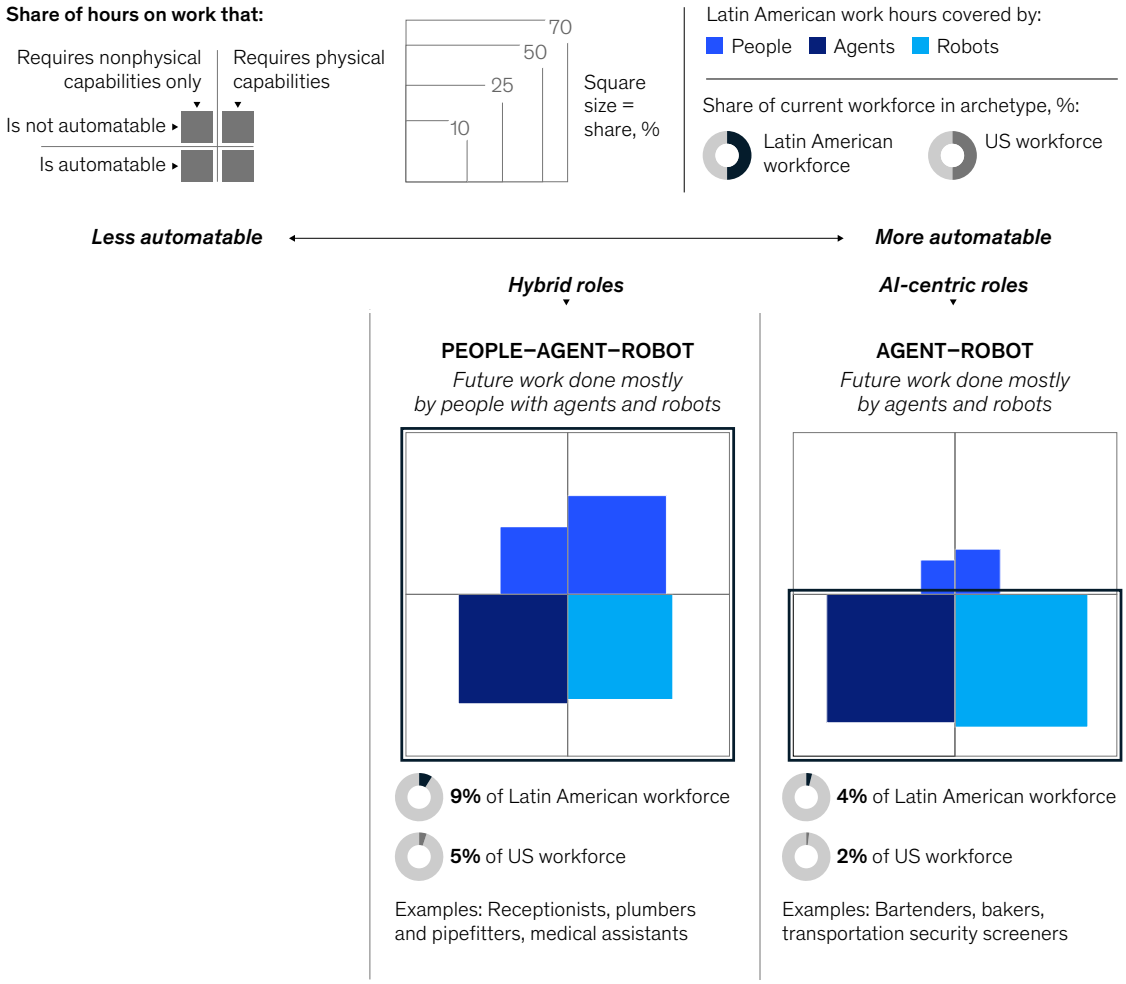


Exhibit 3 (continued)

Over a third of employment is concentrated in people-centric occupations.

Distribution of Latin American work hours across seven occupation archetypes, by technical automation potential, 2024, %



Note: Technical automation potential shown is in 2024, in the late scenario of expert estimates.
Source: International Labour Organization; Lightcast; national statistical offices; McKinsey Global Institute analysis

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An additional 28 percent of employment falls into hybrid roles, in which people work alongside agents, robots, or both. In these occupations—such as salespeople, plumbers, and medical assistants—humans remain central, but workflows may change substantially as agents and robots take on more structured and repeatable tasks.

The remaining 37 percent of employment is concentrated in occupations that could become more AI-centric. These occupations typically involve more routine, codified, or rules-based activities, making them easier to automate than other work.

Panama stands out for its relatively large share of employment in people-centric and hybrid roles, helping explain why its overall automation potential sits below the regional range.

Automation pathways reflect Latin America's economic diversity

As adoption unfolds, three broad automation pathways are likely to emerge across Latin America.

The first group—Argentina, Chile, Costa Rica, and Uruguay—has an automation profile closest to that of advanced economies. These countries have larger service sectors than the regional average, and more than 70 percent of automatable work is nonphysical. AI-enabled agents are therefore likely to play a larger role.

The second group—Brazil, Colombia, the Dominican Republic, Mexico, and Panama—sits closer to the regional middle. Neither agents nor robots dominate to the same degree as in the two other groups, reflecting a more balanced mix of physical and nonphysical work.

The third group—Bolivia, Ecuador, El Salvador, Guatemala, Honduras, and Peru—has more physically intensive employment profiles. Because around 40 percent of automatable work is physical in these countries, capturing value will depend more heavily on robotics, autonomous systems, and the infrastructure needed to deploy them.

CHAPTER TWO

Automation could unlock $450 billion in value in Latin America—depending on the pace of adoption

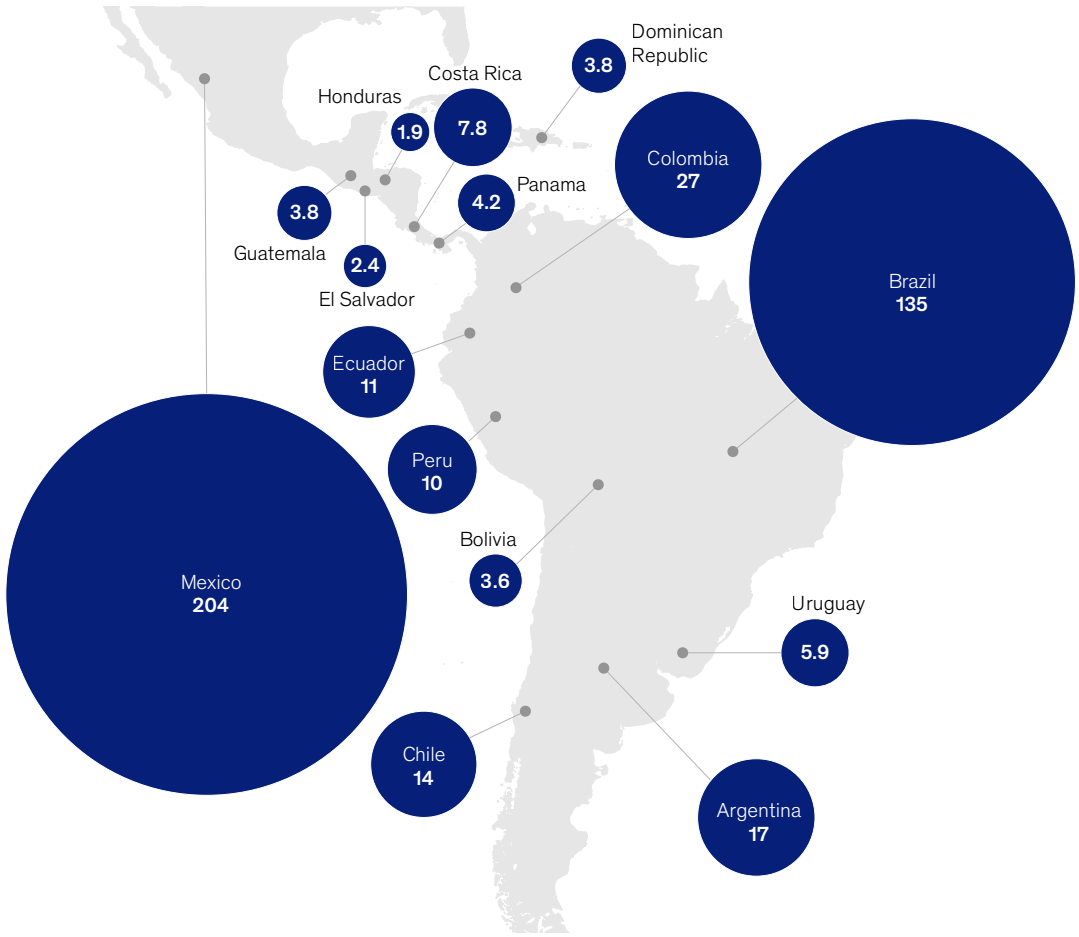
Major new technologies have taken decades to spread, from electricity to industrial robotics to cloud computing, which is still expanding. The pace of AI and automation adoption will hinge on cost-benefit considerations, investment levels, and organizational readiness, as well as the time required to develop and deploy systems.

We model two scenarios based on historical patterns of technology diffusion. In our midpoint scenario, AI and automation could generate about $450 billion in annual economic value by 2030 in Latin America (Exhibit 4).[5] In a more gradual scenario, this falls to roughly $230 billion. The difference shows how strongly outcomes depend on the pace of adoption.

Exhibit 4

By 2030, more than $450 billion of economic value could be unlocked from AI and automation in Latin America, mostly concentrated in Brazil and Mexico.

Economic value of automation in select countries, 2030 midpoint scenario of adoption,[1] $ billion



[1]Sized by multiplying the occupation-level automation adoption (in the midpoint scenario of 2030) by number of employees and annual wage in 2024.
Source: National statistical offices; O*NET; McKinsey Global Institute analysis

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Potential gains are also highly concentrated. Brazil and Mexico account for roughly 75 percent of the region's automation value, largely because of the scale of their workforces and, in Mexico's case, relatively higher wages. Smaller economies could also see substantial gains relative to their size.

These estimates describe potential benefits at the organizational level rather than direct increases in GDP (see sidebar "Methodology for estimating the economic value of AI").[6] They reflect the value of work hours that could be automated—and therefore freed up for other activities—under different adoption scenarios, taking into account both the diffusion of established technologies such as robotics and the emergence of newer, AI-enabled agents.

Sidebar

Methodology for estimating the economic value of AI

Economic value estimates the value of work hours in Latin America that could be automated by 2030 across sectors and functions. This ranges from $450 billion in a midpoint scenario to $230 billion in a more gradual mid-late scenario. We model two adoption scenarios to reflect different paces of uptake: The midpoint scenario represents the central estimate between early and late adoption, while the slower mid-late scenario reflects a trajectory between the midpoint and late adoption.

We begin by estimating technical automation potential, defined as the share of today's work that could be automated using existing technologies, which increases as the technological frontier advances.

Adoption typically lags behind what is technically possible and depends on factors such as integration time, the relative cost of technology and labor, and factors such as customer acceptance, labor laws, and workforce skills.

Our estimate covers paid work activities. Hours worked are time spent on specific activities in today's economy. We assume that 7 to 14 percent of current work hours will be automated by 2030 under the two scenarios, varying by sector—from 9–18 percent in transportation to 20 percent in finance and insurance in the midpoint scenario.

For each occupation within a sector, we apply the adoption rate to today's hours worked and wages, then aggregate the results across sector-function intersections based on occupational composition. We allocate value between agents and robots, depending on the capabilities required for each activity. These estimates reflect direct time savings from automation adoption and exclude second-order effects. They do not assume that the hours saved are redeployed into higher-value activities, nor do they reflect ongoing operating or capital costs, or the potential effects of work performed outside current working hours.

In earlier research, we estimated economic potential solely based on technological feasibility, without reference to the time frame over which it might be realized. On that basis, total economic potential would reach as much as $1.6 trillion across the 15 Latin American countries under the midpoint scenario.

Data sources

The following sources were used to estimate employment and wages across the 15 countries included in the analysis:

Argentina: INDEC Argentina, Encuesta Permanente de Hogares (EPH), 2024 (Q4); International Labour Organization (ILO), ILOSTAT modeled estimates, 2025.

Bolivia: INE Bolivia, Encuesta Continua de Empleo (ECE), 2025 (Q3).

Brazil: Instituto Brasileiro de Geografia e Estatística (IBGE), Pesquisa Nacional por Amostra de Domicílios (PNAD), 2025.

Chile: INE; Ministerio de Desarrollo Social y Familia, Encuesta de Caracterización Socioeconómica Nacional (CASEN), 2024.

Colombia: Departamento Administrativo Nacional de Estadística (DANE), Gran Encuesta Integrada de Hogares (GEIH), 2025.

Costa Rica: ILO, ILOSTAT modeled estimates, 2025.

Dominican Republic: Oficina Nacional de Estadística (ONE), Encuesta Nacional Continua de Fuerza de Trabajo (ENCFT), 2025 (Q4).

Ecuador: INEC Ecuador, Encuesta Nacional de Empleo, Desempleo y Subempleo (ENEMDU), 2024.

El Salvador: ONEC/BCR El Salvador, Encuesta de Hogares de Propósitos Múltiples (EHPM), 2025 (preliminary).

Guatemala: Instituto Nacional de Estadística (INE), Encuesta Nacional de Empleo e Ingresos Continua (ENEIC), 2025.

Honduras: INE Honduras, Encuesta Permanente de Hogares de Propósitos Múltiples (EPHPM), 2024.

Mexico: Instituto Nacional de Estadística y Geografía (INEGI), Encuesta Nacional de Ocupación y Empleo (ENOE) and Cuestionario de Ocupación y Empleo (COE), 2025.

Panama: ILO, ILOSTAT modeled estimates, 2024.

Peru: INEI Peru, Encuesta Nacional de Hogares (ENAHO), 2024.

Uruguay: INE Uruguay, Encuesta Continua de Hogares (ECH), 2024.

In our midpoint scenario, Latin America's adoption rate is materially lower than in advanced economies, at 14 percent compared with 27 percent in the United States and 25 percent in Europe. One reason is economics. Lower wages reduce the incentive to automate because technology remains more expensive relative to the labor it would replace. Countries with higher labor costs tend to have a stronger business case for adoption.

The mix of technologies also matters. Although robots play a larger role in Latin America than in advanced economies, most of the potential value still comes from nonphysical automation delivered by agents—about 80 percent in the midpoint scenario (Exhibit 5). In all sectors, even in physically intensive ones, at least two-thirds of the potential value comes from nonphysical automation, underscoring the importance of software in reshaping workflows. This pattern is consistent with findings in the United States and Europe.

The potential sources of gains from automation also differ across the region, reflecting differences in economic structure (Exhibit 6).

Exhibit 5

Most of the economic value by 2030 could be unlocked from nonphysical, agent-based automation.

Distribution of economic value from agents and robots in Latin America by sector, 2030 midpoint scenario of automation adoption[1]

Agents Robots

Sector	Distribution, %	Value, $ billion	Average automation adoption as share of current work hours, %
Professional, scientific, and technical services	95 / 5	39	19
Educational services	95 / 5	43	16
Finance and insurance[2]	94 / 6	17	20
Information	93 / 7	13	19
Real estate, rental, and leasing	91 / 9	6	15
Administrative support and government	89 / 11	54	15
Arts, entertainment, and recreation	89 / 11	7	14
Healthcare and social assistance	86 / 14	24	12
Utilities	84 / 16	3	14
Transportation and warehousing	81 / 19	19	9
Retail and wholesale trade	80 / 20	56	10
Mining	78 / 22	4	15
Other services (except government)	75 / 25	21	10
Accommodation and food services	68 / 32	25	16
Manufacturing	66 / 34	67	18
Construction	66 / 34	27	14
Agriculture, forestry, fishing and hunting	58 / 42	27	12
Total	**80 / 20**	**453**	**14**

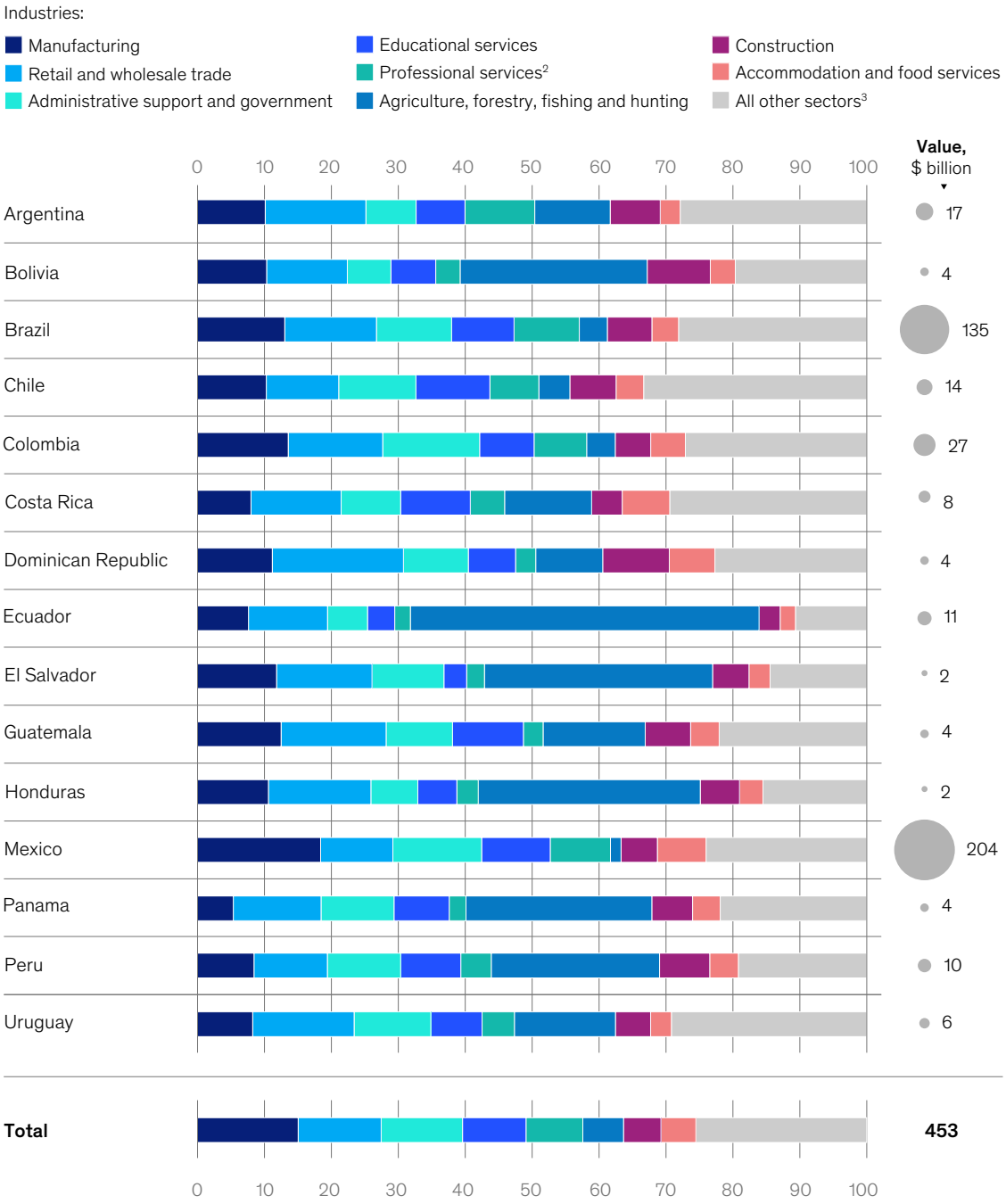
Note: Includes Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Panama, Peru, Uruguay.
[1]Economic potential was calculated using 2024 nominal wage bill and 2030 automation adoption rate in the midpoint scenario.
[2]Includes management of companies and enterprises.
Source: National statistical offices; O*NET; McKinsey Global Institute analysis

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Exhibit 6

The potential value from AI and automation is concentrated in a few countries, shaped by economic size and structure.

Distribution of economic value across industries in Latin America by country, 2030 midpoint scenario of automation adoption,[1] % of country value



[1]Sized by multiplying the occupation-level automation adoption in the midpoint scenario for 2030 by the number of employees and annual wage in 2024.
[2]Includes management of companies and enterprises.
[3]Includes healthcare and social assistance; other services (except government); transportation and warehousing; finance and insurance; information; arts, entertainment, and recreation; real estate, rental, and leasing; mining; utilities.
Source: National statistical offices; O*NET; McKinsey Global Institute analysis

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CHAPTER THREE

Workers will increasingly apply their skills alongside agents and robots

To understand how AI may be reshaping demand for human skills in Latin America, we analyzed job postings from five of the region's 15 economies, where data are sufficient to track changing employer demand. Argentina, Brazil, Chile, Colombia, and Mexico account for roughly 75 percent of the region's workforce and economic output. While they do not capture the full diversity of Latin America, they provide a useful window into how employer demand for skills is changing.

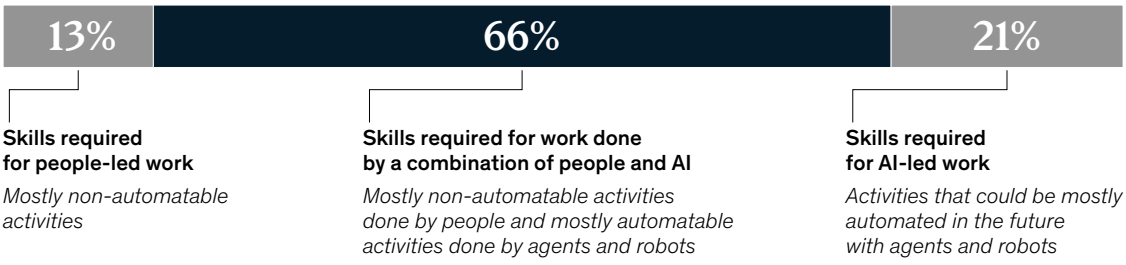
Our analysis finds that roughly 66 percent of skills currently demanded by employers are used in a mix of work activities—some that can be automated and others that cannot (Exhibit 7; see sidebar "How we assess skill exposure to automation").

As a result, most skills are more likely to be applied in new ways than replaced outright. As AI takes on more common and structured tasks, the value of many skills may increasingly come from areas where people provide judgment, context, and accountability. Workers may spend less time executing routine tasks directly and more time directing, interpreting, and improving the work of automated systems.

Exhibit 7

Most of the skills demanded by Latin American employers are common to both automatable and non-automatable work activities.

Distribution of ~7,000 skills by technical automation potential, 2024[1]



[1]Based on technical automation potential in 2024. "People-led" skills are mostly used in non-automatable activities, "AI-led" skills are mostly used in automatable activities, and shared skills are common to both.
Source: Lightcast; O*NET; Current Population Survey; McKinsey Global Institute analysis

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Sidebar

How we assess skill exposure to automation

Our assessment of how skills could change integrates four inputs: employment in various occupations, detailed work activities (DWAs) of each occupation, the skills relevant for each DWA, and the McKinsey automation adoption model estimating the automatability of each DWA.

Our model draws on full-time-equivalent (FTE) and average wage data for about 800 occupations from the US Bureau of Labor Statistics (BLS), data from O*NET on about 2,000 DWAs linked to occupations, and data on roughly 34,000 skills linked to about 1,800 occupations from Lightcast. For each country, we filtered the skills data set to include only those skills appearing in at least 5 percent of job postings for each of the approximately 1,800 Lightcast occupations. We also filtered out occupations with fewer than 21 job postings in the fourth quarter of 2025, narrowing the sample to about 7,100 skills across the five Latin American countries.

We then mapped the BLS occupation, wage, and FTE data of each country onto the Lightcast occupations. Next, we mapped all skills to their corresponding DWAs within occupations. We leveraged the existing 9.7 million occupation–DWA–skill mappings from the US and Europe data and added 2.0 million mappings unique to Latin America.

We used OpenAI's GPT-4o model through the asynchronous chat-completions endpoint. Each occupation–DWA–skill combination was processed as an individual API call with a standardized prompt to ensure consistent outputs. To verify quality, we first created a manually built 1,000-cell template for the generative model to replicate and infer from. We conducted iterative quality testing—spot-checking outputs, refining prompts, and rerunning samples—until the model produced reliable and consistent mappings.

To examine potential future implications of AI for skills, we used two lenses.

First, we classified the skills into three groups—people-led, AI-led, and shared—based on the technical automation potential of their associated work activities. For each skill in each country, we calculated the total time spent on these mapped DWAs and identified the share of that time associated with automatable versus non-automatable work. Skills with 55 percent or more of their time in non-automatable activities were classified as people-led, while those with 55 percent or more in automatable activities were classified as AI-led. All other skills were categorized as shared

Second, we assessed the potential skill change level by 2030, calculated from the average automation adoption projected for specific occupation–DWA combinations mapped to that skill, weighted by time spent. The analysis relies on the 2030 midpoint automation adoption rate for each DWA for each country, drawn from the latest (2025) update of the McKinsey automation model.

Consider, for example, how crop management might evolve. AI could process satellite imagery, soil sensor readings, and weather forecasts to identify patterns and risks across large cultivated areas, while an agronomist interprets those signals and makes decisions about treatment, planting, and land use.

Similarly, safety compliance in manufacturing and industrial operations may involve automated systems monitoring sensor data and flagging potential violations in real time, while a person determines the response and remains accountable for outcomes. In both cases, machines identify patterns or issues, while people apply judgment and ensure accountability.

An additional 21 percent of skills are mainly associated with automatable activities. These skills are more likely to become embedded within agent-led or robot-enabled workflows as automation spreads. Examples prominent in the Latin American data include bookkeeping and financial record management in back-office operations, and trade documentation and customs compliance in many of the region's export-oriented industries.

The remaining 13 percent of skills are mainly associated with non-automatable activities that rely on interpersonal interaction or contextual decision-making, including managing relationships, leading teams, caregiving, and clinical support.

Employers are already demanding more AI-related skills

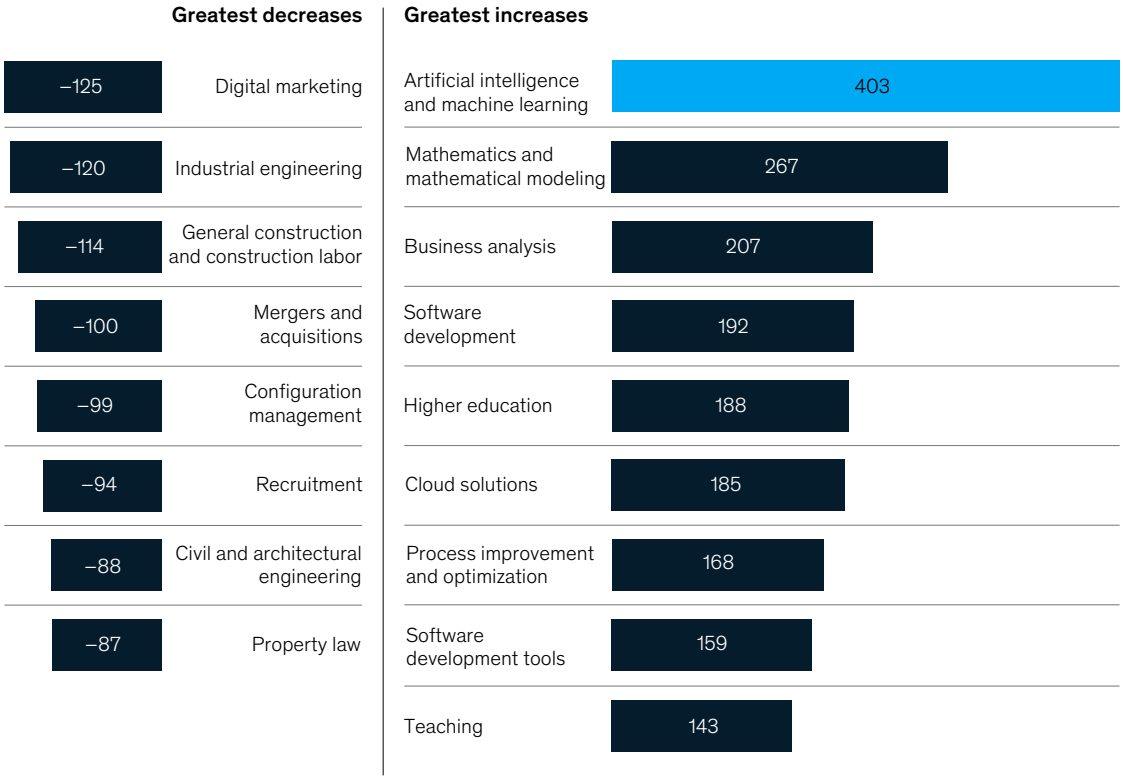
Between late 2023 and late 2025, demand for AI-related skills grew faster than any other skill category in the five Latin American economies we tracked (Exhibit 8). Demand also rose sharply for several complementary skills—including teaching, process improvement, software development, and business analysis. Together, these trends suggest that employers are seeking skills that help organizations incorporate and use AI effectively.

Exhibit 8

Demand for AI-related skills is rising rapidly across Latin America.

Change in occupations with job postings mentioning each skill subcategory, 2023–25[1]

Total unique occupations: ~1,800



[1]At least one skill associated with the subcategory is listed in 5% or more of job postings for a given occupation. Includes only occupations with 21 or more job postings. Changes are measured between the fourth quarter of 2023 and the fourth quarter of 2025.
Source: Lightcast; McKinsey Global Institute analysis

McKinsey & Company

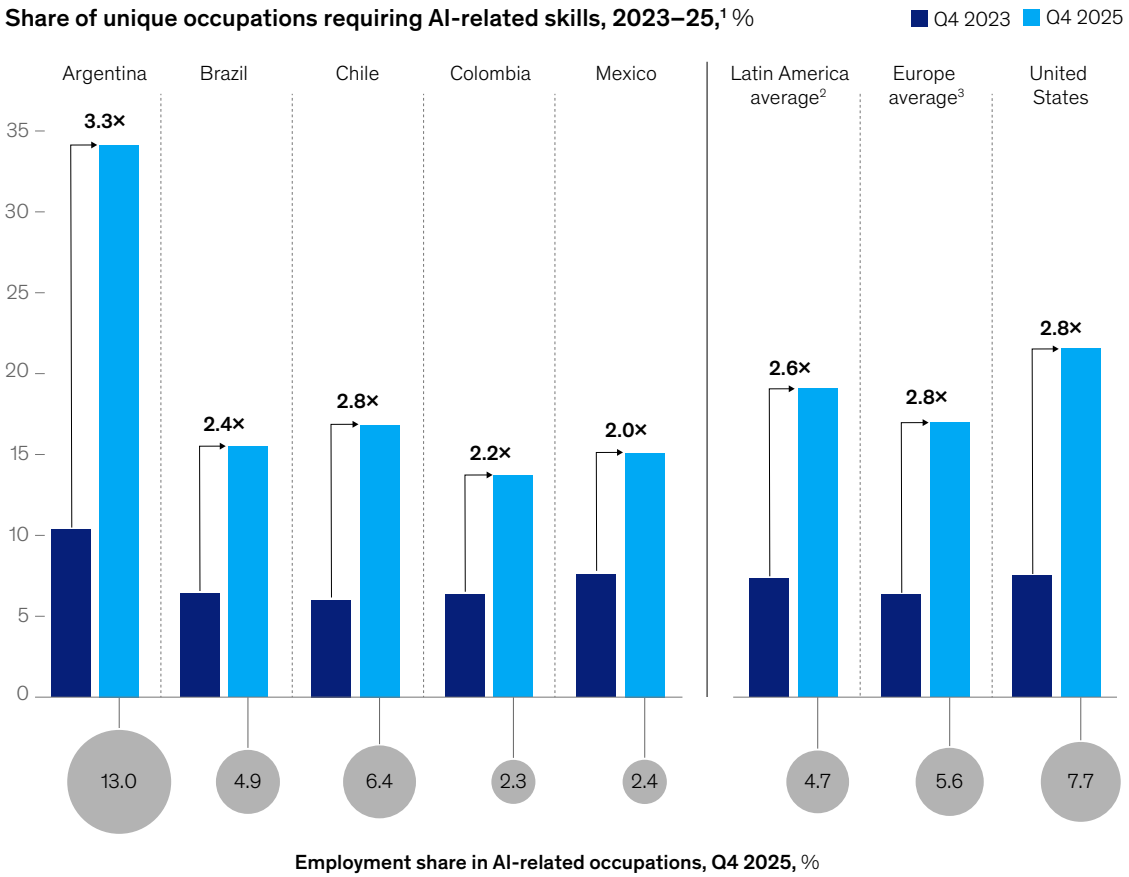
The increase is spreading across a wide range of occupations, although the number of affected workers remains relatively limited. To understand how broadly demand is diffusing through labor markets, we examine two measures: the share of occupations that now require AI-related skills and the share of workers employed in those occupations.

Over the same time period, the share of occupations requiring AI-related skills nearly tripled, reaching about one in five. The share is highest in Argentina, at about one-third, reflecting the country's large concentration of office-based work, particularly in administrative support and sales occupations where AI tools are being adopted rapidly.

The spread across occupations overstates the number of workers currently affected. In Argentina, for example, about 34 percent of occupations now require AI-related skills, but those occupations account for only about 13 percent of employment. The corresponding shares are lower in Chile, Brazil, Mexico, and Colombia (Exhibit 9).

Exhibit 9

AI-related skill demand is rising across Latin America, led by Argentina.



[1]Only occupations with 30 or more postings in the case of Europe and 21 or more for Latin America, for statistical significance. Occupations are considered to require AI/machine learning skills when at least 5% of the postings mention them.
[2]Simple average taken across individual nations' proportions. Latin America considers Argentina, Brazil, Chile, Colombia, and Mexico.
[3]Europe includes Czech Republic, Denmark, France, Germany, Italy, Netherlands, Poland, Spain, Sweden, and the United Kingdom.
Source: International Labour Organization; Lightcast; national statistical offices; McKinsey Global Institute analysis

McKinsey & Company

Across the five countries included in our skills analysis, about 9.9 million people work in occupations where AI-related skills are now a requirement, a number representing roughly 5 percent of total employees. Demand for these skills is more broadly distributed across occupations than in the United States and Europe. Across the region, the top seven occupation groups account for about 80 percent of demand, compared with concentration in just three groups in the United States and Europe (Exhibit 10).

Demand is emerging in some unexpected places. Strikingly, about one-third of workers in arts, design, entertainment, sports, and media occupations are employed in roles that now require AI-related skills—the same share as in computer and mathematical occupations. Demand is spreading not only through technical roles but also through creative and content-oriented work. This broad distribution implies that AI training may need to reach a much wider segment of Latin America's workforce than is often assumed.

Exhibit 10

Most AI-related skill demand in Latin America is dispersed across seven occupation groups, versus concentration in three in the United States.

Employees in Latin American occupations where an AI-related skill was listed in at least 5% of postings[1]

Compared with US: ● Higher ● Similar ○ Lower Occupation type: ■ STEM ■ Non-STEM

Occupation group	Latin America share vs US share	Total FTE workers, million	Workers whose jobs require AI skills: Share, %	Workers whose jobs require AI skills: Count, million
Office and administrative support	●	16.1	11	1.8
Computer and mathematics[2]	○	3.9	34	1.3
Sales and related	●	38.3	3	1.3
Arts, design, entertainment, sports, and media	●	3.6	34	1.2
Management[2]	○	13.1	7	0.9
Business and financial operations	●	7.1	11	0.8
Educational instruction and library[2]	●	8.7	9	0.8

~80% *of demand for AI skills from 7 groups[2]*

Exhibit 10 (continued)

Most AI-related skill demand in Latin America is dispersed across seven occupation groups, versus concentration in three in the United States.

Employees in Latin American occupations where an AI-related skill was listed in at least 5% of postings[1]

Compared with US: ● Higher ● Similar ○ Lower Occupation type: ■ STEM ■ Non-STEM

Occupation group	Latin America share vs US share	Total FTE workers, million	Workers whose jobs require AI skills: Share, %	Workers whose jobs require AI skills: Count, million
Architecture and engineering	●	3.7	10	0.4
Legal	○	3.4	10	0.3
Personal care and services	●	7.0	4	0.3
Installation, maintenance, and repair	●	5.2	3	0.2
Life, physical, and social sciences	○	1.6	10	0.2
Community and social services	●	2.3	6	0.1
Healthcare practitioners and technical	●	7.7	2	0.1
Transportation and material moving	●	22.2	0	0.1
Farming, fishing, and forestry	●	0.9	4	<0.1
Healthcare support	●	2.7	1	<0.1
Protective services	●	5.8	0	<0.1
Production	●	15.1	0	<0.1
3 other groups	—	—	—	—

~20% *of demand for AI skills from 12 groups*

3 groups with no AI skills demand

[1]Includes only skills categorized by Lightcast as "artificial intelligence and machine learning" or "natural learning processing."
[2]In the US only three groups concentrate 75% of demand for AI skills: computer and mathematics; management; and business and financial operations.
Source: International Labour Organization; Lightcast; national statistical offices; McKinsey Global Institute analysis

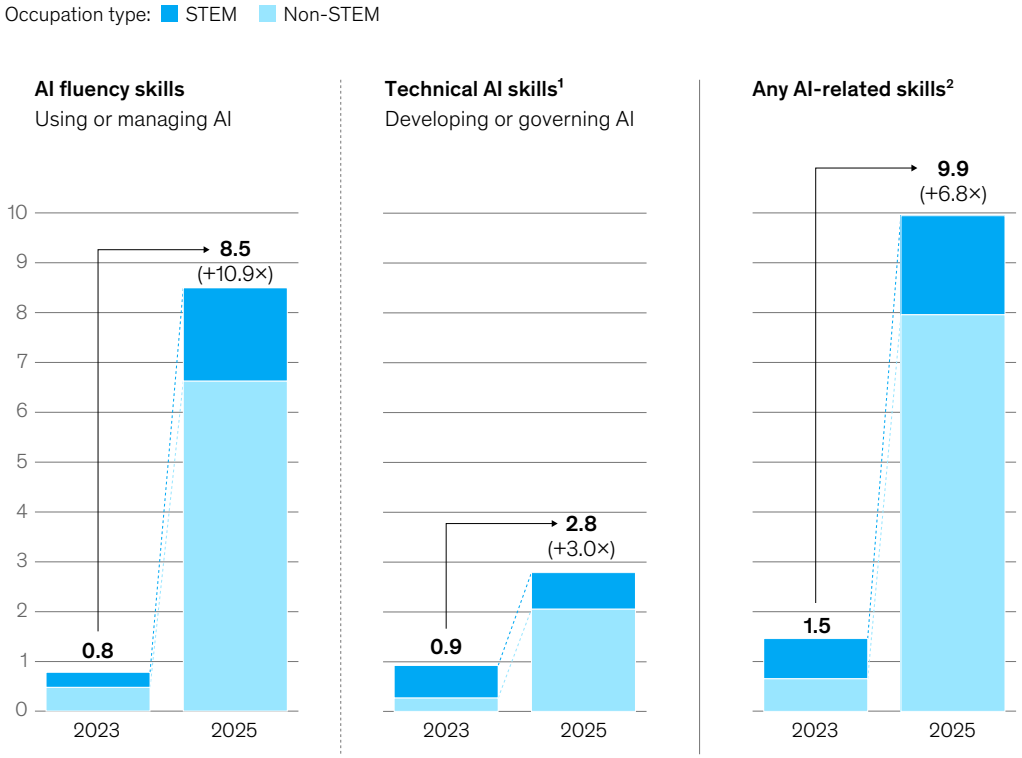
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Across the region, demand for AI fluency—the ability to use, manage, and increasingly create with AI systems—is growing much faster than demand for technical AI skills (see sidebar "What is AI fluency?"). Between 2023 and 2025, jobs requiring AI fluency rose nearly 11-fold, with most of the increase in non-STEM roles (Exhibit 11). Growth outpaced that in the United States and Europe, where demand rose about fivefold in the same period. The pattern suggests that workers and employers in Latin America are readily adopting accessible AI tools even if deploying entirely new systems takes longer.

Exhibit 11

Demand for AI fluency and technical AI skills is rising rapidly beyond STEM.

Employees in occupations with AI-related skills in at least 5% of postings, million



Note: STEM roles include those in the following occupation groups: computer and mathematical; architecture and engineering; life, physical, and social sciences; and healthcare.
[1]Technical AI skills refer to specialized capabilities used to build, train, engineer, and govern AI systems, including model development as well as the responsible, ethical, and compliant deployment of AI.
[2]Employees in jobs demanding AI-related skills may need AI fluency skills, technical AI skills, or both; the two subcategory counts may not add to the total employees demanding AI-related skills.
Source: International Labour Organization; Lightcast; national statistical offices; McKinsey Global Institute analysis

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Sidebar

What is AI fluency?

AI fluency is not AI expertise in the engineering sense. It is the practical ability to use and manage AI in day-to-day work. As tools and interfaces evolve, the requirements of AI fluency are also expanding beyond prompting to include integrating AI into workflows, interpreting outputs, and applying judgment in how AI is used. This includes recognizing when results may be wrong and knowing when to escalate to human review, especially for higher-stakes decisions.

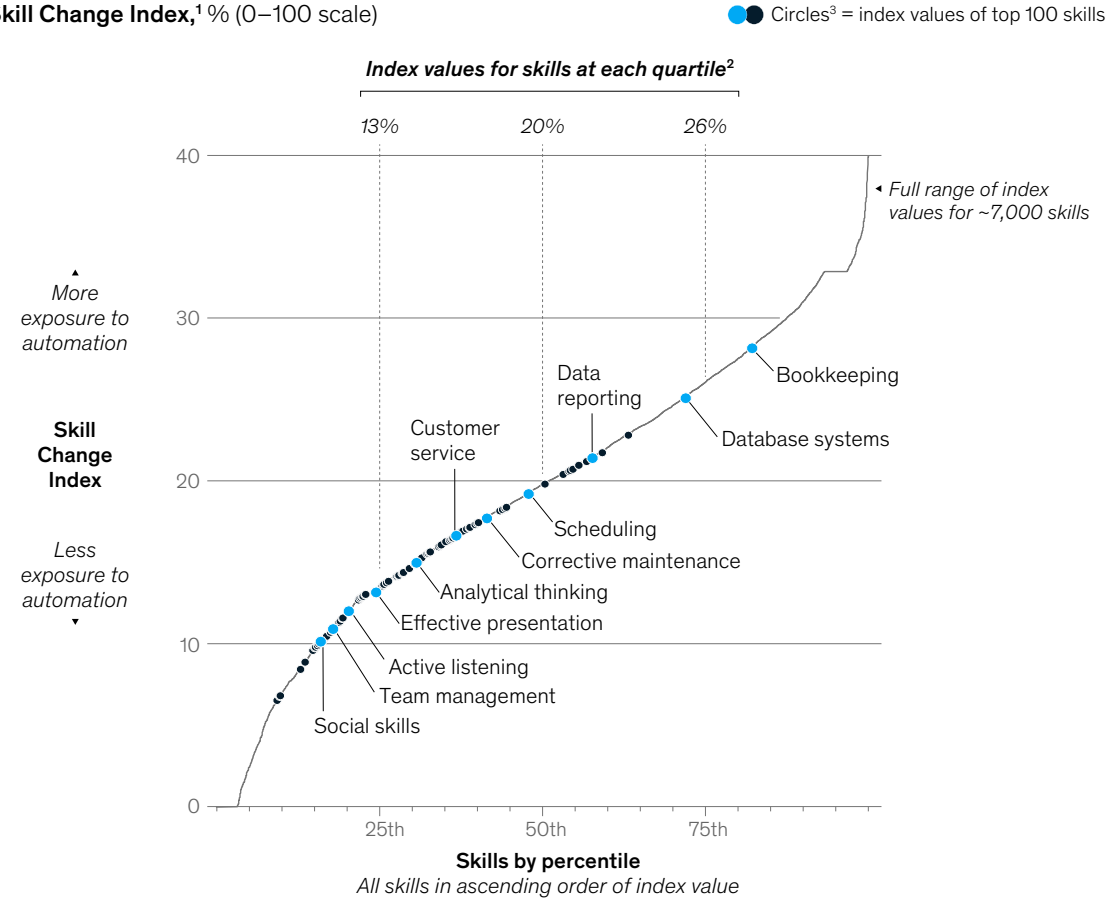
In practice, AI fluency shows up in tasks such as drafting and refining content, summarizing information, generating analytical options, and building lightweight prototypes using low- or no-code tools. The pace of change means AI fluency increasingly requires complementary skills such as adaptability, continuous learning, and comfort operating in new human-machine environments. Because AI fluency applies across a broad range of occupations, while technical AI skills are concentrated in a narrower set of roles, demand for fluency affects a much wider share of the workforce.

The Skill Change Index points to widespread shifts in skills by 2030

To gauge how skill demand may change in Latin America, we apply a tool developed in earlier MGI research that maps skill exposure to automation (see sidebar "How we assess skill exposure to automation"). As in the United States and Europe, the Skill Change Index (SCI) suggests that most worker skills will be affected to some degree by 2030, with all 100 of the most widely demanded skills in the Latin America sample showing some exposure (Exhibit 12).

Exhibit 12

Our Skill Change Index shows how automation exposure varies across skills in Latin America.



[1]Based on projected 2030 midpoint scenario of automation adoption of activities associated with skills, aggregated across occupations using employment-based weighting.
[2]We excluded skills that could not be linked to detailed work activities within occupations.
[3]According to the number of occupations that require each skill.
Source: Lightcast; national statistical offices; McKinsey Global Institute analysis

McKinsey & Company

Data management and administrative processing skills are among the most exposed, particularly database administration, scripting languages, and financial record management. Mineral processing, an important skill in Latin America's mining industry, also appears near the high end of the distribution.

The least exposed skills share a common feature: Their value depends less on processing structured information than on human presence, trust, and situational judgment. First aid and nursing require proximity and real-time response to unpredictable needs. Building trust, customer service, and managing relationships with clients and partners all depend on understanding people, context, and

intent. Their lower SCI values suggest that automation has made less headway where work is deeply relational, embodied, or context specific.

For reference, the region's most in-demand skills are generally less exposed to automation than those in advanced economies. This likely reflects Latin America's position on the adoption curve rather than a fundamentally different pattern of change. As technology spreads and adoption rises, many of the same skills that are changing in advanced economies are likely to face growing exposure in Latin America as well.

The skills most exposed to AI in Latin America are already beginning to change in some workplaces. The following case studies show what that looks like in practice.

CASE STUDIES

AI at work in Latin America

Our analysis suggests that AI adoption may progress more slowly in Latin America than in the United States and Europe, partly because lower wages reduce the economic incentive for labor substitution and because many opportunities depend on physical automation, which is often expensive.

Yet there are already many examples of companies across the region deploying these technologies at scale.

The six case studies below illustrate a common pattern: the largest gains often come not from automating individual tasks but from redesigning workflows around the complementary strengths of people and AI.

Some deployments improve existing work, making processes faster, safer, more consistent, and more efficient. Others enable capabilities that would be difficult—or impossible—to achieve through human effort alone.

Case study 1

AI agents restructure credit evaluation at a regional bank

A regional commercial bank struggled with a slow and inconsistent credit evaluation process. From intake through decision, the process took more than 40 days on average, with about 55 percent of cases requiring rework. Analysts manually gathered data from fragmented sources, ran financial calculations, and drafted credit memos, a sequence consuming four to five days for the analyst's portion alone. Decisions relied on individual judgment with nonstandardized criteria, limited traceability, and no systematic way to document decision rationales. Clients turned to competitors because the bank was not able to respond fast enough.

To address this, the bank deployed 45 specialized AI agents organized around distinct functions in the credit workflow. Extractor agents read contracts, financial statements, and scanned documents. Financial analyst agents assess financial performance, while other agents monitor changes in risk profiles, identify anomalies, and flag questionable recommendations before they reach decision-makers. Together, the system integrates 14 data sources and generates more than 50 automated alerts per case, identifying risks that otherwise might be missed, including atypical growth, covenant breaches, and cross-document inconsistencies.

The system evaluates all available inputs using standardized criteria and a documented process, something that would be difficult to sustain through manual review alone. Credit memos arrive 85 percent complete in hours rather than days. The analyst's role shifts from conducting the evaluation to reviewing outputs, challenging conclusions, and making final decisions. Total credit decision time fell by 55 percent.

Case study 2

AI agents transform freight contracting at a paper producer

At a paper producer, freight contracting was managed through a manual freight desk. A team of analysts handled route requests one by one, reaching out to independent owner-operators via a messaging app to confirm availability, verify requirements, and schedule transport. A small share of the drivers carried the lion's share of the volume, constraining capacity and reducing the ability to optimize. Most of the team's effort was devoted to day-to-day execution, leaving little time to improve how freight was sourced and contracted, while also detracting from driver experience.

The company introduced six AI agents to manage different parts of the freight contracting process. Some convert transport demand into offers for drivers, others engage drivers through the messaging platform, while additional agents handle scheduling, onboarding, and performance tracking.

The system increased the pool of contacted drivers far beyond what was feasible under manual processes, translating into a 10 to 20 percent decline in direct freight costs. Analysts now act as supervisors, focusing on overseeing the system, defining contracting rules, and handling unusual cases rather than conducting basic outreach and scheduling transactions.

Case study 3

AI agents accelerate claims processing at a pipeline operator

A pipeline operator manages about 800 kilometers of infrastructure across jungle, mountain, and desert terrain. When landowners file claims for compensation related to the pipeline, the company must receive and process the claim, validate land titles, cross-reference historical precedents, and negotiate settlements. Under the previous approach, this process took about six months per claim. The team manually gathered documentation, classified cases using inconsistent criteria, and lacked a systematic approach to identify duplicate claims or establish consistent pricing across similar situations.

The company deployed five specialized AI agents to restructure claims processing. A history digitization agent converts past claims into a searchable database. A claims evaluation agent classifies each claim, determining whether it is valid, duplicated, or already compensated. A geospatial validation agent overlays historically claimed surfaces on a map to detect overlapping or fraudulent filings. A clustering agent groups similar past claims by location and outcome to identify settlement patterns. A negotiation report agent generates settlement recommendations based on the findings of the other agents.

What once took six months now takes around two weeks, with a 58 percent reduction in processing costs and an expected halving of settlement times. Faster and more consistent settlements also reduce friction between the company and the communities living near its infrastructure, replacing drawn-out disputes with a more transparent and predictable process. The role of claims analysts shifts from manual document processing to active case management, reviewing agent-generated recommendations and focusing on exceptions and negotiations that require human judgment. The system now applies uniform criteria across the portfolio, providing a level of consistency that manual case management could not deliver.

Case study 4

AI reshapes supply chain risk management and shop floor operations at a technology manufacturer

A regional factory operated by a global technology manufacturer managed supply chain risks across more than 20 systems, with 10 to 20 teams handling fulfillment issues offline. Mitigation plans relied heavily on experience and took two to three days to develop. On the manufacturing floor, teams used traditional problem-solving methods, but lessons learned and performance data were difficult to capture and share consistently across the organization. Analysts spent approximately nine hours per week preparing performance reviews manually.

To address this, the company deployed two interconnected AI systems to manage supply chain risks and support shop floor operations. A supply chain system monitors parts, suppliers, shipments, and inventory across more than 50 data sources, identifying risks and generating mitigation proposals. On the manufacturing floor, AI tools help line leaders identify issues, monitor performance, and produce daily operational summaries.

The supply chain system provides a centralized view of risks that were previously managed across disconnected teams, while continuous monitoring identifies issues that manual processes often missed. In this area, issue resolution time fell by 60 percent and risk identification lead time by 75 percent. On the manufacturing floor, line leaders follow AI-guided resolution protocols, reducing mean time to solve issues by 95 percent and increasing units per hour by 42 percent.

Case study 5

An AI decision support system helps an airline respond to disruptions

At a major regional airline, the Operations Control Center is responsible for resolving disruptions, including flight cancellations, aircraft reassignments, and cargo fit adjustments. The work was historically manual and fragmented. Analysts had to evaluate multiple variables simultaneously, including service continuity, crew constraints, and airport costs, while coordinating across multiple teams. With no standardized tool to compare alternatives, the default was to act on the first workable option found rather than the best one.

To resolve disruptions more quickly and consistently, the airline developed an AI decision support system. Using four specialized agents, it evaluates options to identify the least disruptive response, while checking operational, crew, and airport constraints. Operators input the disruption and receive a recommendation within minutes. They can then focus on validating and coordinating the response.

The result was a reduction in resolution time, which had been two to three hours, to about five minutes. Faster resolution also makes it possible to consider cost alongside operational constraints, which was impractical when simply finding a workable solution took hours.

Case study 6

Agentic AI turns a telecom call center from a cost center into a revenue channel

A telecom operator's call center handled about 600,000 inbound calls per month, the vast majority for service requests or complaints. Each complaint call was also a potential sales opportunity, but representatives had no way to identify buying signals while simultaneously managing resolution. The call center operated as a cost center with no systematic mechanism to generate revenue from inbound traffic.

The company used an agentic AI platform to analyze 100 percent of inbound calls in real time. The system detects buying signals within complaint conversations and recommends specific sales actions to representatives as the call is happening. It supports over 1,000 representatives and processes the full daily call volume, identifying opportunities that no human team could reliably detect at that scale.

The call center continues to handle complaints, but representatives now receive real-time guidance from AI that helps convert customer service conversations into sales. The approach delivers a conversion rate of around 5.6 percent, roughly three times the typical outbound campaign performance. The cost of the system is less than one cent per call.

Latin America has a similar scale of automation potential as the United States and Europe, but a different mix of opportunities and constraints. Physical work accounts for a larger share of employment, making robots and other forms of physical automation more important. At the same time, lower wages and higher costs for robotics may slow uptake.

Yet slower adoption should not be mistaken for a lack of innovation. In Latin America, demand for AI fluency is growing roughly twice as fast as in advanced economies, suggesting that companies are already incorporating AI into everyday work, even if they are not always deploying entirely new systems.

The case studies in this report show what deeper adoption can look like. Some companies are already redesigning operations around agents and robots—sometimes improving existing work and, in other cases, enabling capabilities that would be difficult or impossible through human effort alone.

One finding stands out across Latin America, the United States, and Europe: people remain essential to most work. AI and automation are likely to change many jobs, and some workers will face significant disruption. But the central challenge is redefining how people and machines work together to create value.

Workers will need greater AI fluency, organizations will need to redesign workflows and invest in training, and educators and policymakers will need to provide support to help workers adapt.

Different countries and industries will take different paths, and outcomes are not predetermined. If managed well, the transition could raise productivity across Latin America and create new opportunities for people to contribute alongside agents and robots.

Glossary

Concept	Definition
Adoption	The deployment of AI and automation technology into real work activities and workflows within an organization or labor-force context, determining how much of the automation potential is captured, how fast, and how broadly.
Agents	Machines that perform work in the digital world, augmenting or substituting a person's nonphysical capabilities (for example, natural language generation, social and emotional reasoning, creativity).
AI-powered agents	Agents with AI embedded, allowing them to act more autonomously and orchestrate workflows; also known as agentic AI.
AI-powered robots	Robots with AI embedded, allowing them to act more autonomously and orchestrate workflows.
Artificial intelligence (AI)	The ability of software to perform tasks that traditionally require human intelligence, potentially augmenting or substituting people's capabilities.
Capabilities	Physical or nonphysical abilities that support the application of skills, assessed based on human levels of performance required to perform work activities. Nonphysical capabilities include cognitive (for example, natural language, logical reasoning, creativity, navigation) and social and emotional capabilities.
Generative AI	Applications of AI that take unstructured data as inputs and generate unstructured data through foundation models (large artificial neural networks trained on vast amounts of varied data).
Nonphysical work	Work that involves cognitive or social/emotional capabilities rather than physical movement, such as problem-solving, information processing, creating, or collaborating with others.
Occupations	A set of jobs that share similar tasks or work activities that can be described in terms of their skills, work contexts, and other qualifications. We use the United States' formal classification of occupations, maintained by the Bureau of Labor Statistics. Occupations can be synonymous with "roles" and are not to be confused with employment.
Physical work	Work that involves direct interaction with the physical world, requiring motion-based capabilities such as gross motor skills, fine motor skills, and mobility. These tasks typically include operating or moving objects, tools, or machinery, assembling or positioning materials, and performing actions that depend on human strength or dexterity.
Robots	Machines that perform work in the physical world, augmenting or substituting a person's physical capabilities (that is, gross motor skills, fine motor skills, or mobility).
Skills	Knowledge, competencies, and attributes that people deploy to perform work activities, often acquired through formal education, training, or work experience. Lightcast and European Skills, Competencies, Qualifications, and Occupations (ESCO) provide a market-driven classification system for skills.
Technical automation potential	The share of work hours that theoretically could be automated with certain levels of technical capabilities. We assessed the technical automation potential across economies through an analysis of the detailed work activities of each occupation, completed for 800 occupations in each of the 15 Latin American countries analyzed.
Work activities	Observable work behavior that represents what people do to accomplish the objectives of an occupation. In the United States, activities are formally classified by O*NET into detailed work activities (DWAs).
Workflows	A structured sequence of work activities that collectively advance work toward a defined goal, guided by processes (e.g., rules, dependencies, information flows) and involving people and technologies.

Endnotes

1 For this report, Latin America refers to 15 economies: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, the Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Panama, Peru, and Uruguay. These economies were selected to provide broad coverage of the region's labor markets and economic structures, including service-oriented, manufacturing, agricultural, and resource-based economies.

2 Technical automation potential shown is the late scenario of expert estimates. In the early scenario of technical automation potential, agents and robots could perform 60 to 70 percent of today's global work hours.

3 Many technologies perform these functions, some based on AI and others not, with the boundaries between them fluid and changing. Using the terms in this expansive way lets us analyze how automation reshapes work overall.

4 Innovation has historically displaced some activities while also generating new categories of employment that were difficult to anticipate in advance. Recent examples include AI trainers, AI content creators, human-AI collaboration leads, and responsible AI specialists.

5 Values are expressed in nominal US dollars.

6 These estimates reflect potential gains at the level of individual organizations, through higher output in existing activities and new value created by freeing capacity from routine tasks. They do not necessarily translate directly into increases in national GDP, as many firms operate across borders and value may be captured throughout global value chains or as consumer surplus, which is not measured in GDP. How much of this value Latin American corporations realize will depend in part on how firms reinvest these gains.

Country dashboards

Argentina

Brazil

Chile

Colombia

Mexico

Argentina

In Argentina, about 58 percent of work hours could be automated using existing technologies, broadly in line with Latin America's average. Roles demanding AI skills already represent about 14 percent of employment—above levels seen in Europe and the United States—while demand for AI-related skills is growing faster than the regional average.

58%
Share of current work hours technically automatable with existing technology

$17 billion
Estimated economic value from automation adoption by 2030, midpoint scenario

78%
Share of human skills that will endure for people amid automation

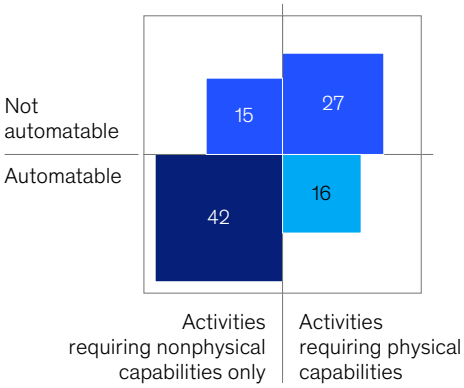
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People in jobs requiring AI fluency in 2025 vs 2023

Automation could change how work gets done in Argentina.

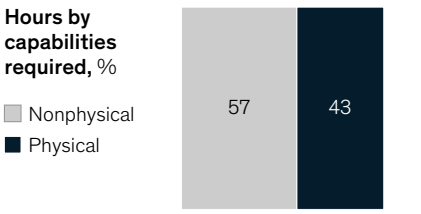
Distribution of work hours, 2024

Share of work that could be done by:
People · Agents · Robots

Hours by technical automation potential,[1] %

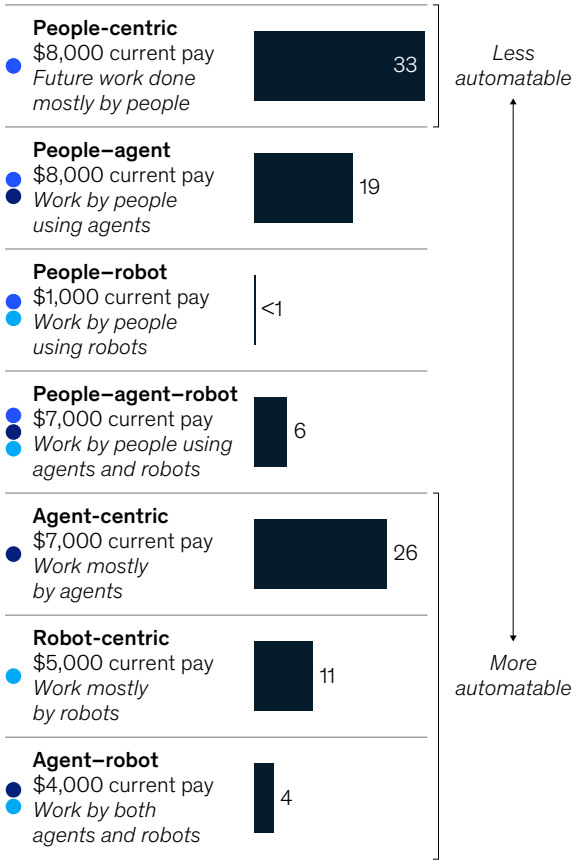


Hours by capabilities required, %



53% of workforce in more physical roles[2]

Distribution of workforce across occupation archetypes, 2024, %



Economic value by sector and domain at 11% automation adoption, 2030 midpoint scenario[3]

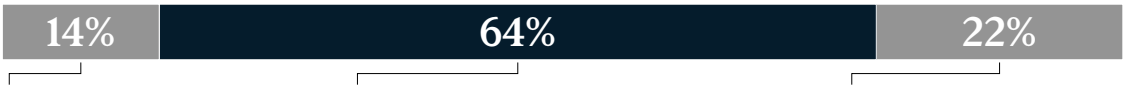
Domain's share of each sector's value, %



Sector	Sector value, $ billion
Accommodation and food services	1
Administrative support and government	1
Agriculture, forestry, fishing and hunting	2
Arts, entertainment, and recreation	<1
Construction	1
Educational services	1
Finance and insurance	<1
Healthcare and social assistance	1
Information	<1
Manufacturing	2
Mining	<1
Other services (excluding government)	1
Professional, scientific, and technical services[5]	2
Real estate, rental, and leasing	<1
Retail and wholesale trade	3
Transportation and warehousing	1
Utilities	<1
Total value, $ billion	10	1	2	<1	1	1	1	<1	<1	<1	<1	1	**17**

AI will reshape skills in Argentina's workforce.

Distribution of ~7,000 skills by technical automation potential, 2024



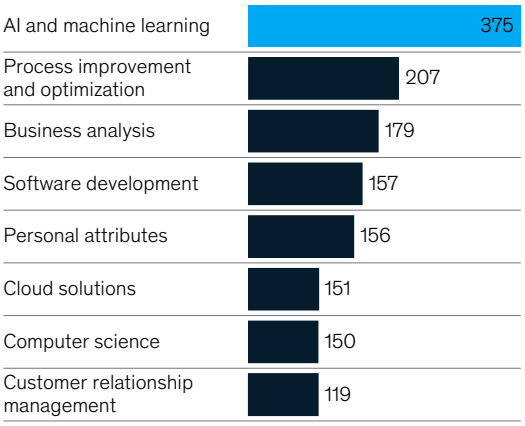
Skills required for people-led work[6]
Mostly non-automatable activities

Skills required for work done by a combination of people and AI
Mostly non-automatable activities done by people and mostly automatable activities done by agents and robots

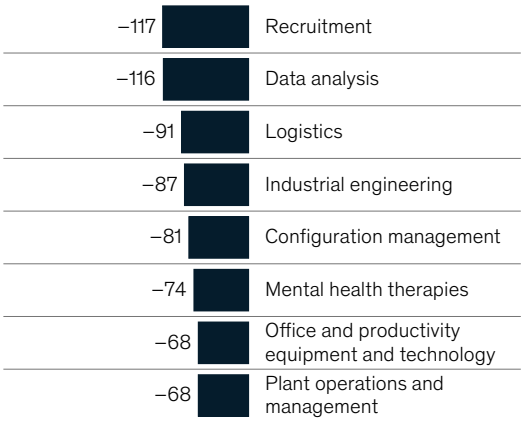
Skills required for AI-led work[6]
Activities that could be mostly automated in the future with agents and robots

Change in occupations with postings mentioning each skill subcategory, 2023–25[7]

Greatest increases



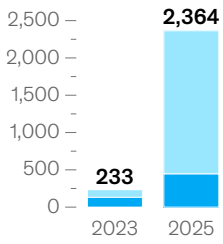
Greatest decreases



Employees in occupations with AI-related skills in at least 5% of postings, thousand

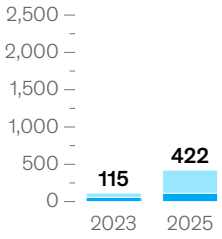
Occupation type: STEM[8] Non-STEM

AI fluency skills
Using or managing AI



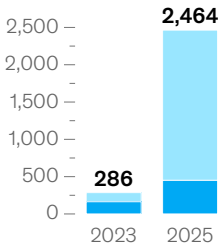
10.1×

Technical AI skills
Developing or governing AI



3.7×

Any AI-related skills[9]



8.6×

Employees in occupations with AI-related skills in at least 5% of postings[10]

Occupation type: STEM Non-STEM

Occupation group	Total FTE workers, thousand	Workers whose jobs require AI skills: Share, %	Workers whose jobs require AI skills: Count, thousand
Office and administrative support	1,884	42	792
Management	1,453	22	323
Sales and related	3,792	8	302
Computer and mathematics	466	52	242
Business and financial operations	431	44	188
Community and social services	487	28	138
Healthcare practitioners and technical	550	19	106
Arts, design, entertainment, sports, and media	235	41	97
Architecture and engineering	219	25	54
Life, physical, and social sciences	246	20	49
Legal	49	90	44
Educational instruction and libraries	531	8	40
Farming, fishing, and forestry	39	87	34
Transportation and material moving	1,764	1	25
Personal care and services	348	7	25
Protective services	616	1	5
Installation, maintenance, and repair	305	<1	1
5 other groups	5,493	—	0

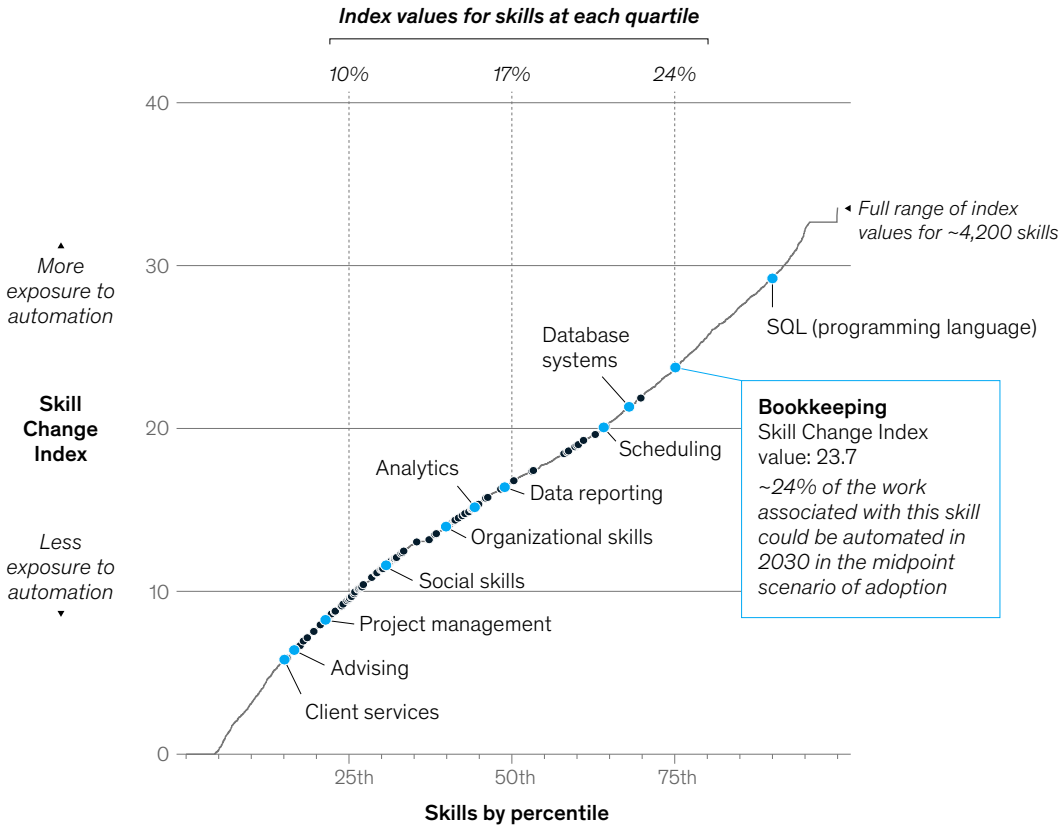
~81% *of demand for AI skills from 6 groups*

~19% *of demand for AI skills from 11 groups*

5 groups with no AI skills demand

Skill Change Index,[11] % (0–100 scale)

Circles = index values of top skills



Note: Values are in nominal US dollars. Figures may not sum to 100% due to rounding. Exhibits analyzing AI-related skills demand include only occupations with 30 or more job postings in Q4 2025. [1]Automation potential reflects technological capabilities to perform work. Estimates shown represent the late scenario of expert assessments. In an early scenario, global technical automation potential ranges from 60% to 70% of current work hours. [2]Defined as occupations in which at least 40% of work hours require physical capabilities. [3]Estimated by multiplying occupation-level automation adoption in the 2030 midpoint scenario by full-time equivalents and 2024 wages. [4]Includes customer-facing domains directly involved in delivering products or services. Excludes support domains, except where these constitute core operations within a given sector, for example, finance professionals in the finance and insurance industry. [5]Includes management of companies and enterprises. [6]"People-led" and "AI-led" skills are defined as those used in more than 80% of time spent on associated work activities. [7]At least 1 skill in the subcategory appears in ≥5% of job postings for a given occupation. [8]STEM roles include computer and mathematical; architecture and engineering; life, physical, and social sciences; and healthcare occupations. [9]Employees in jobs requiring AI-related skills may need AI fluency, technical AI skills, or both; totals may not sum. [10]Includes only skills Lightcast categorizes as "artificial intelligence and machine learning" or "natural language processing." [11]Based on the projected 2030 midpoint scenario of automation adoption, aggregated across occupations using employment-based weighting. We exclude skills that could not be linked to work activities within occupations.
Source: Eurostat; ILOSTAT modeled estimates, 2025; INDEC Argentina, Encuesta Permanente de Hogares (EPH); Lightcast; O*NET; McKinsey Global Institute analysis

McKinsey & Company

Brazil

At 56 percent, Brazil's technical automation potential is slightly below Latin America's average. Demand for AI-related skills, however, is rising faster than the regional average, for both AI fluency and technical AI skills. By 2030, automation could unlock an estimated $135 billion in annual economic value, the second-largest opportunity in the region after Mexico.

56%
Share of current work hours technically automatable with existing technology

$135 billion
Estimated economic value from automation adoption by 2030, midpoint scenario

78%
Share of human skills that will endure for people amid automation

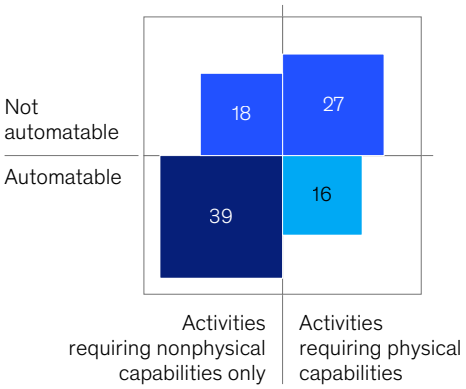
19.1×
People in jobs requiring AI fluency in 2025 vs 2023

Automation could change how work gets done in Brazil.

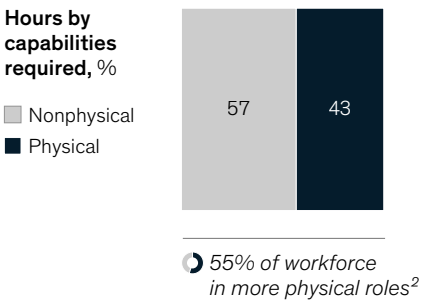
Distribution of work hours, 2024

Share of work that could be done by:
People · Agents · Robots

Hours by technical automation potential,[1] %

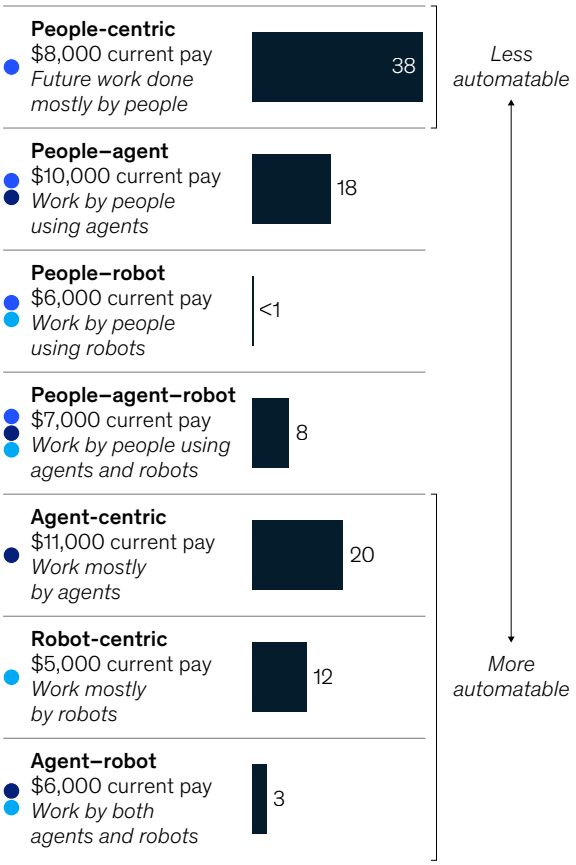


Hours by capabilities required, %

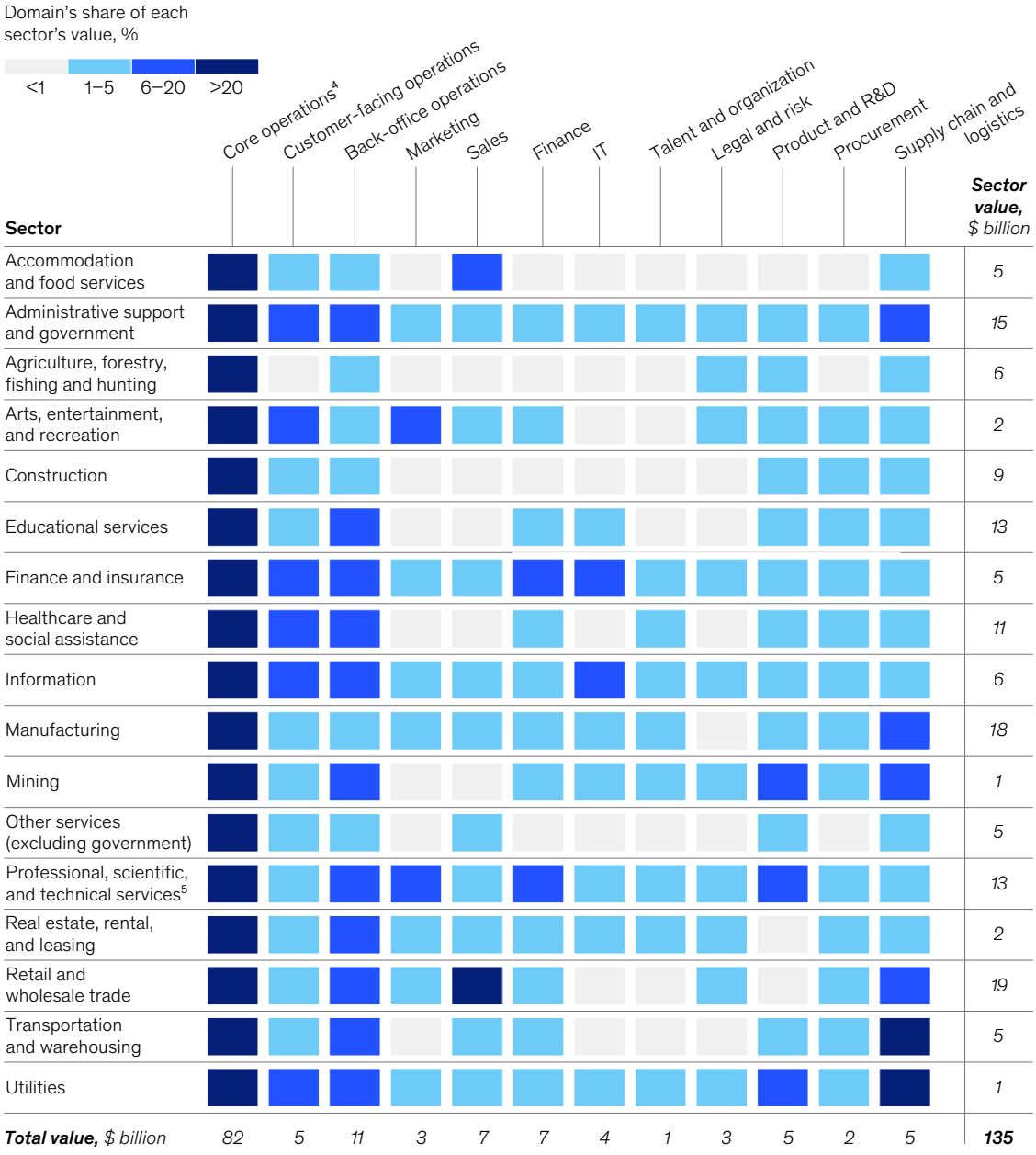


55% of workforce in more physical roles[2]

Distribution of workforce across occupation archetypes, 2024, %

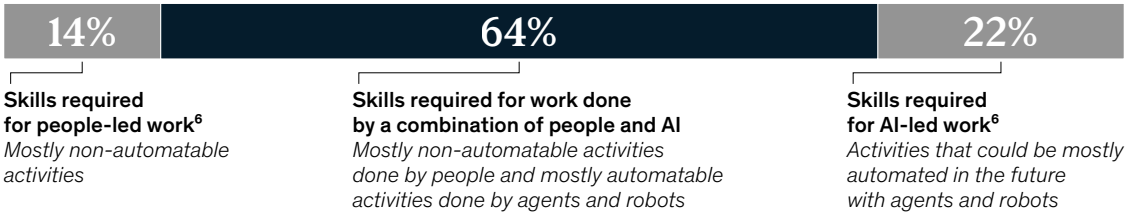


Economic value by sector and domain at 15% automation adoption, 2030 midpoint scenario[3]



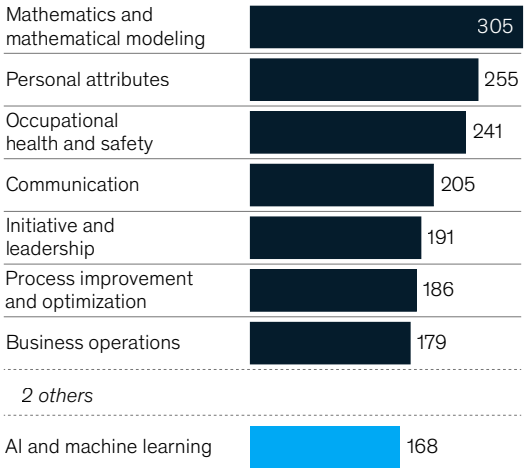
AI will reshape skills in Brazil's workforce.

Distribution of ~7,000 skills by technical automation potential, 2024

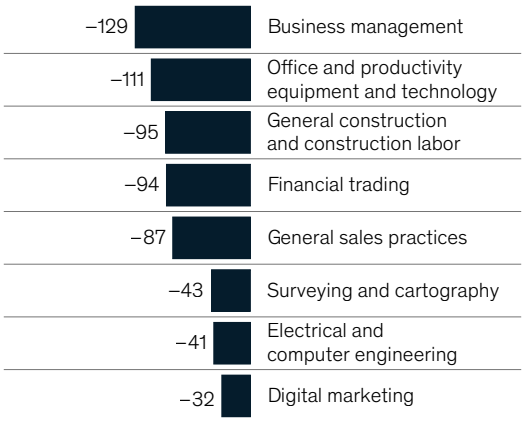


Change in occupations with postings mentioning each skill subcategory, 2023–25[7]

Greatest increases

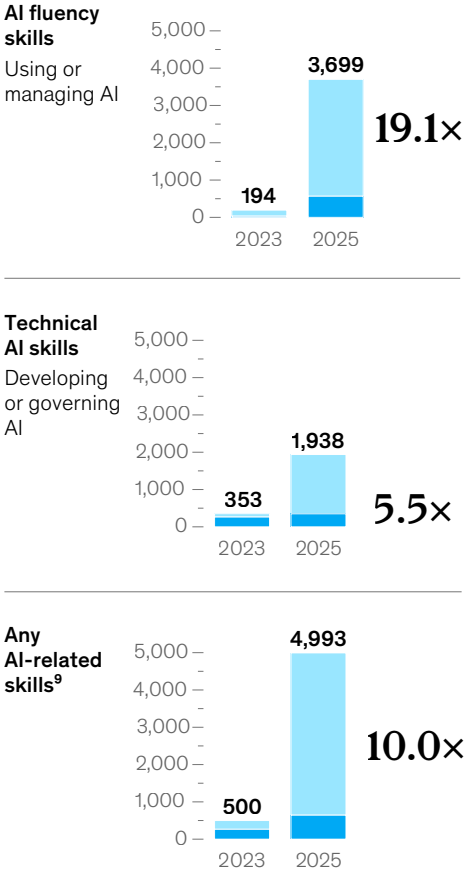


Greatest decreases



Employees in occupations with AI-related skills in at least 5% of postings, thousand

Occupation type: STEM[8] Non-STEM



Employees in occupations with AI-related skills in at least 5% of postings[10]

Occupation type: STEM Non-STEM

Occupation group	Total FTE workers, thousand	Workers whose jobs require AI skills	
		Share, %	Count, thousand
Sales and related	16,328	5	879
Office and administrative support	6,928	12	864
Educational instruction and libraries	5,172	12	646
Arts, design, entertainment, sports, and media	1,651	35	582
Computer and mathematics	1,957	22	437
Business and financial operations	3,662	10	365
Management	5,069	6	325
Personal care and services	4,108	7	278
Legal	2,214	9	196
Installation, maintenance, and repair	2,526	6	152
Architecture and engineering	1,851	6	111
Life, physical, and social sciences	709	10	73
Transportation and material moving	11,458	1	64
Healthcare practitioners and technical	5,292	<1	12
Healthcare support	1,222	1	9
7 other groups	30,835	—	0

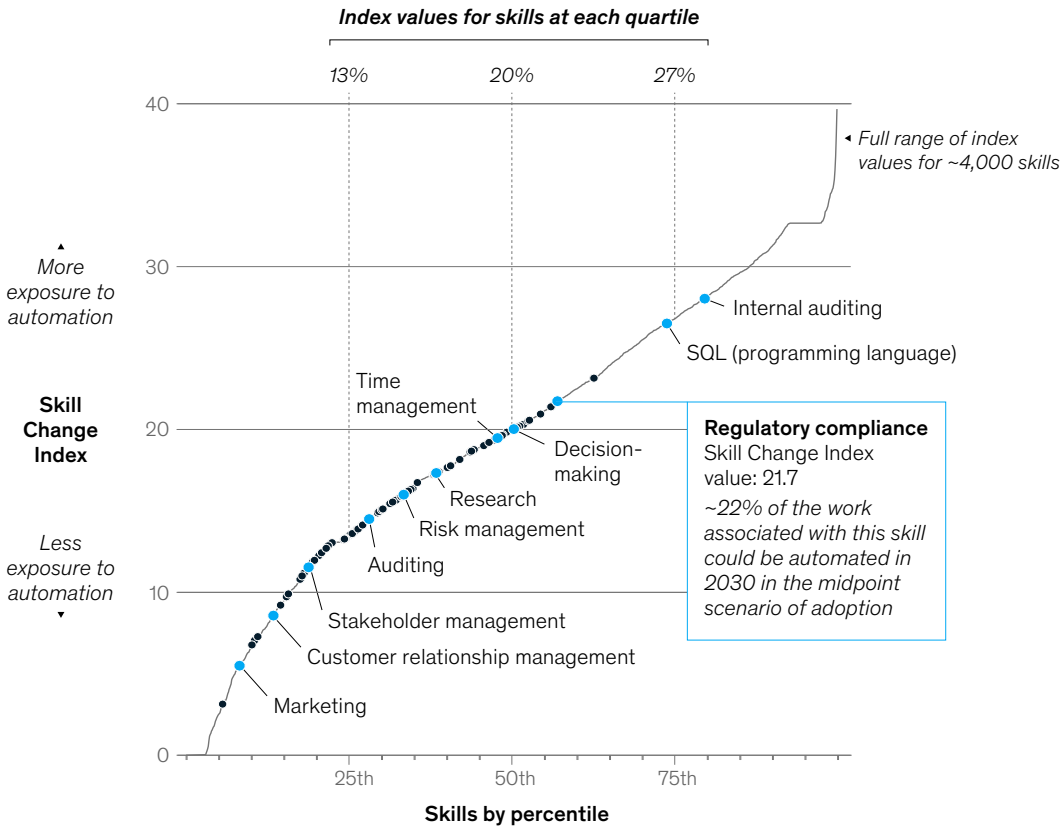
~76% *of demand for AI skills from 6 groups*

~24% *of demand for AI skills from 9 groups*

7 groups with no AI skills demand

Skill Change Index,[11] % (0–100 scale)

Circles = index values of top skills



Note: Values are in nominal US dollars. Figures may not sum to 100% due to rounding. Exhibits analyzing AI-related skills demand include only occupations with 30 or more job postings in Q4 2025. [1]Automation potential reflects technological capabilities to perform work. Estimates shown represent the late scenario of expert assessments. In an early scenario, global technical automation potential ranges from 60% to 70% of current work hours. [2]Defined as occupations in which at least 40% of work hours require physical capabilities. [3]Estimated by multiplying occupation-level automation adoption in the 2030 midpoint scenario by full-time equivalents and 2024 wages. [4]Includes customer-facing domains directly involved in delivering products or services. Excludes support domains, except where these constitute core operations within a given sector, for example, finance professionals in the finance and insurance industry. [5]Includes management of companies and enterprises. [6]"People-led" and "AI-led" skills are defined as those used in more than 80% of time spent on associated work activities. [7]At least 1 skill in the subcategory appears in ≥5% of job postings for a given occupation. [8]STEM roles include computer and mathematical; architecture and engineering; life, physical, and social sciences; and healthcare occupations. [9]Employees in jobs requiring AI-related skills may need AI fluency, technical AI skills, or both; totals may not sum. [10]Includes only skills Lightcast categorizes as "artificial intelligence and machine learning" or "natural language processing." [11]Based on the projected 2030 midpoint scenario of automation adoption, aggregated across occupations using employment-based weighting. We exclude skills that could not be linked to work activities within occupations.
Source: Eurostat; Instituto Brasileiro de Geografia e Estatística (IBGE), Pesquisa Nacional por Amostra de Domicílios (PNAD); Lightcast; O*NET; McKinsey Global Institute analysis

McKinsey & Company

Chile

In Chile, about 56 percent of work hours could be automated using existing technologies, slightly below Latin America's average. Demand for AI fluency is rising faster than in any of the other countries covered in our regional labor market analysis. The country's work profile is also more oriented toward nonphysical work than those of its peers. Automation could unlock an estimated $14 billion in annual economic value by 2030, with gains concentrated in knowledge-intensive sectors.

56%
Share of current work hours technically automatable with existing technology

$14 billion
Estimated economic value from automation adoption by 2030, midpoint scenario

80%
Share of human skills that will endure for people amid automation

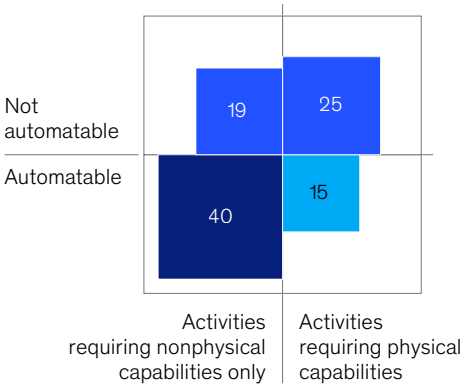
28.7×
People in jobs requiring AI fluency in 2025 vs 2023

Automation could change how work gets done in Chile.

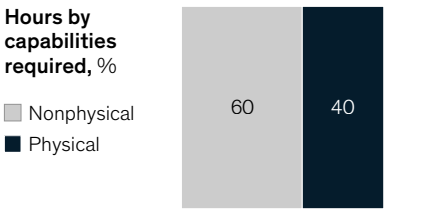
Distribution of work hours, 2024

Share of work that could be done by:
People Agents Robots

Hours by technical automation potential,[1] %

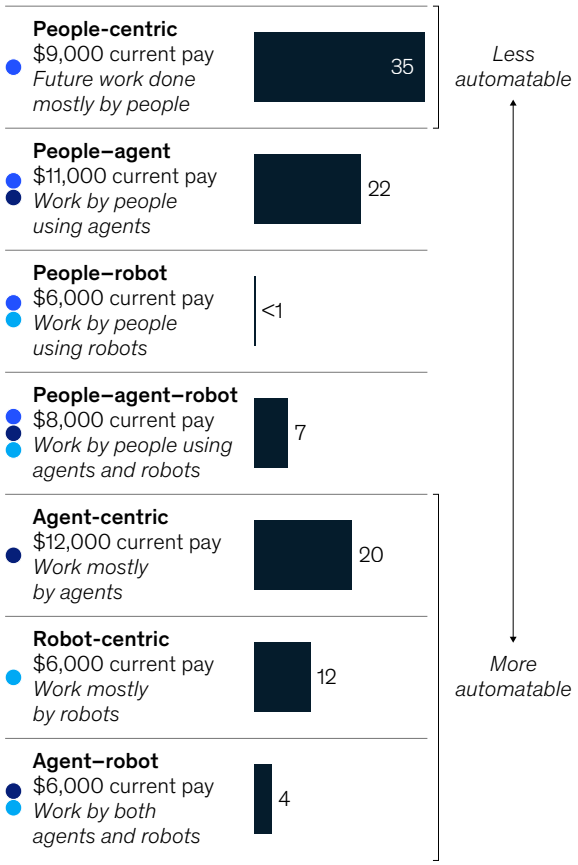


Hours by capabilities required, %

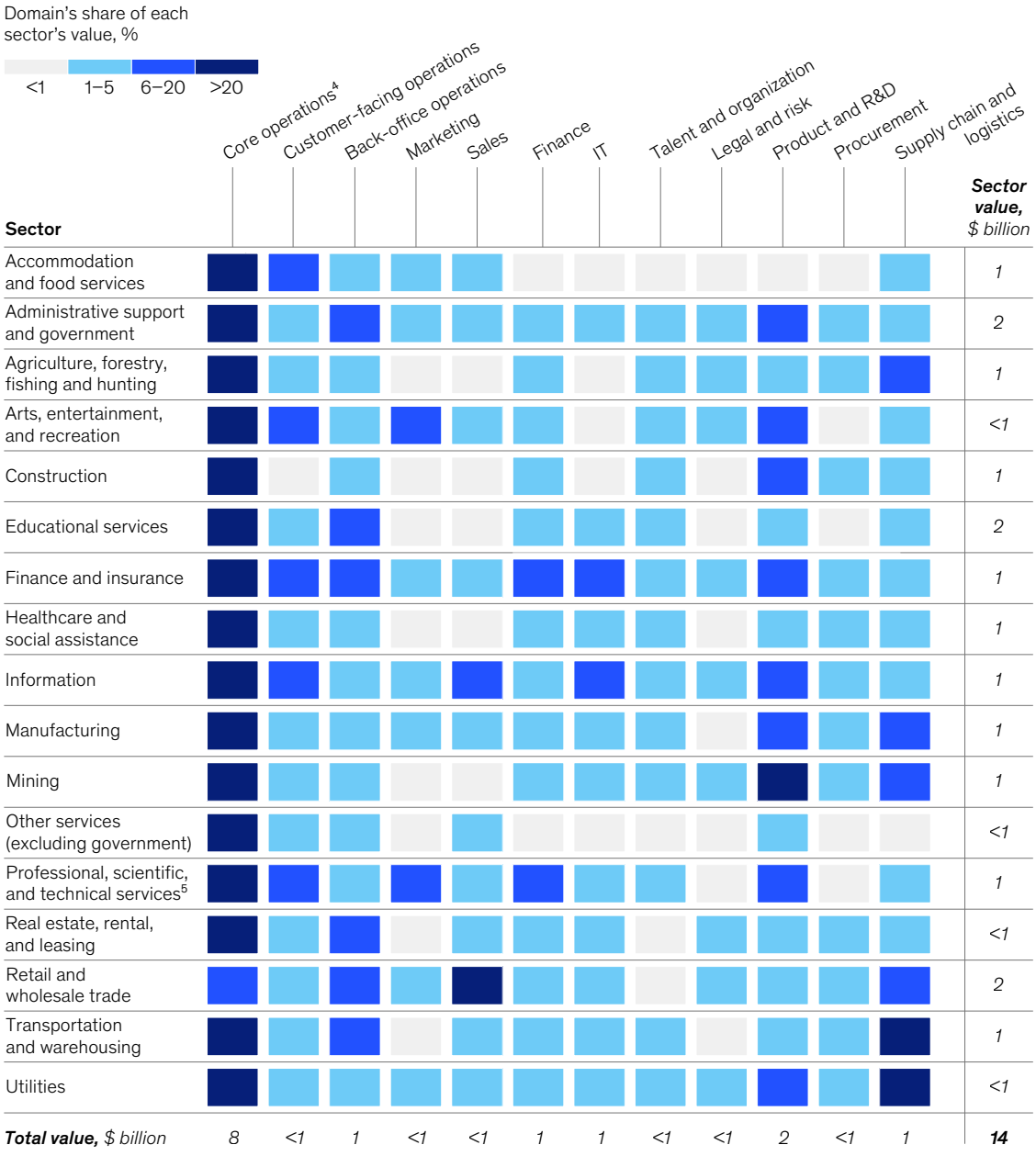


50% of workforce in more physical roles[2]

Distribution of workforce across occupation archetypes, 2024, %

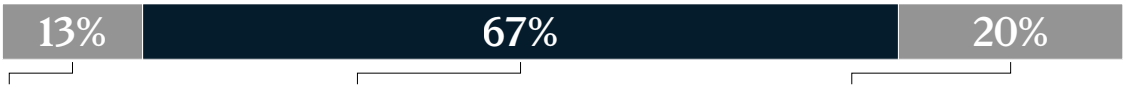


Economic value by sector and domain at 14% automation adoption, 2030 midpoint scenario[3]



AI will reshape skills in Chile's workforce.

Distribution of ~7,000 skills by technical automation potential, 2024



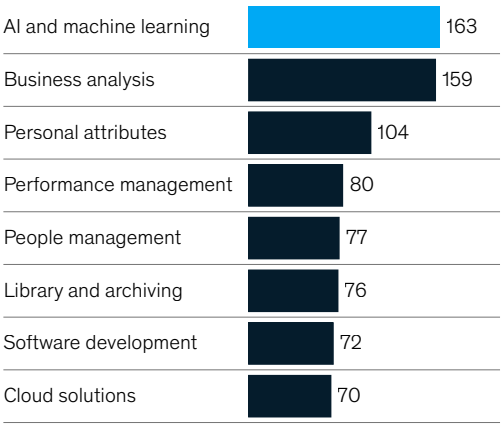
Skills required for people-led work[6]
Mostly non-automatable activities

Skills required for work done by a combination of people and AI
Mostly non-automatable activities done by people and mostly automatable activities done by agents and robots

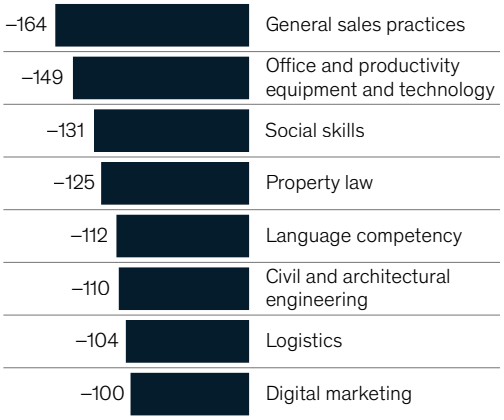
Skills required for AI-led work[6]
Activities that could be mostly automated in the future with agents and robots

Change in occupations with postings mentioning each skill subcategory, 2023–25[7]

Greatest increases



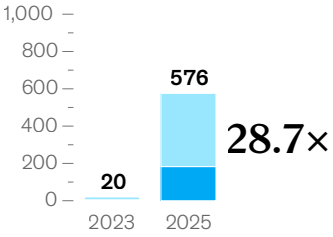
Greatest decreases



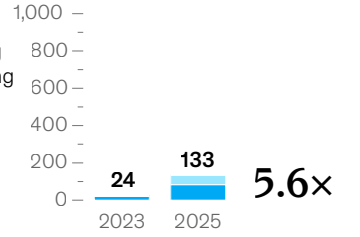
Employees in occupations with AI-related skills in at least 5% of postings, thousand

Occupation type: STEM[8] Non-STEM

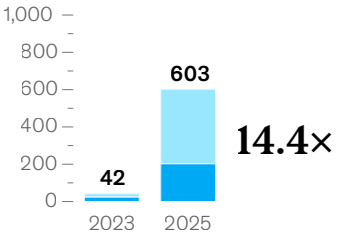
AI fluency skills
Using or managing AI



Technical AI skills
Developing or governing AI



Any AI-related skills[9]



Employees in occupations with AI-related skills in at least 5% of postings[10]

Occupation type: STEM Non-STEM

Occupation group	Total FTE workers, thousand	Workers whose jobs require AI skills	
		Share, %	Count, thousand
Business and financial operations	484	30	147
Architecture and engineering	489	19	93
Computer and mathematics	183	47	86
Legal	121	71	86
Arts, design, entertainment, sports, and media	239	28	68
Office and administrative support	623	6	36
Sales and related	1,504	2	30
Management	609	4	22
Life, physical, and social sciences	94	20	19
Educational instruction and libraries	510	1	6
Healthcare practitioners and technical	411	1	5
Personal care and services	192	1	3
Installation, maintenance, and repair	252	1	3
Production	431	<1	<1
8 other groups	3,257	—	0

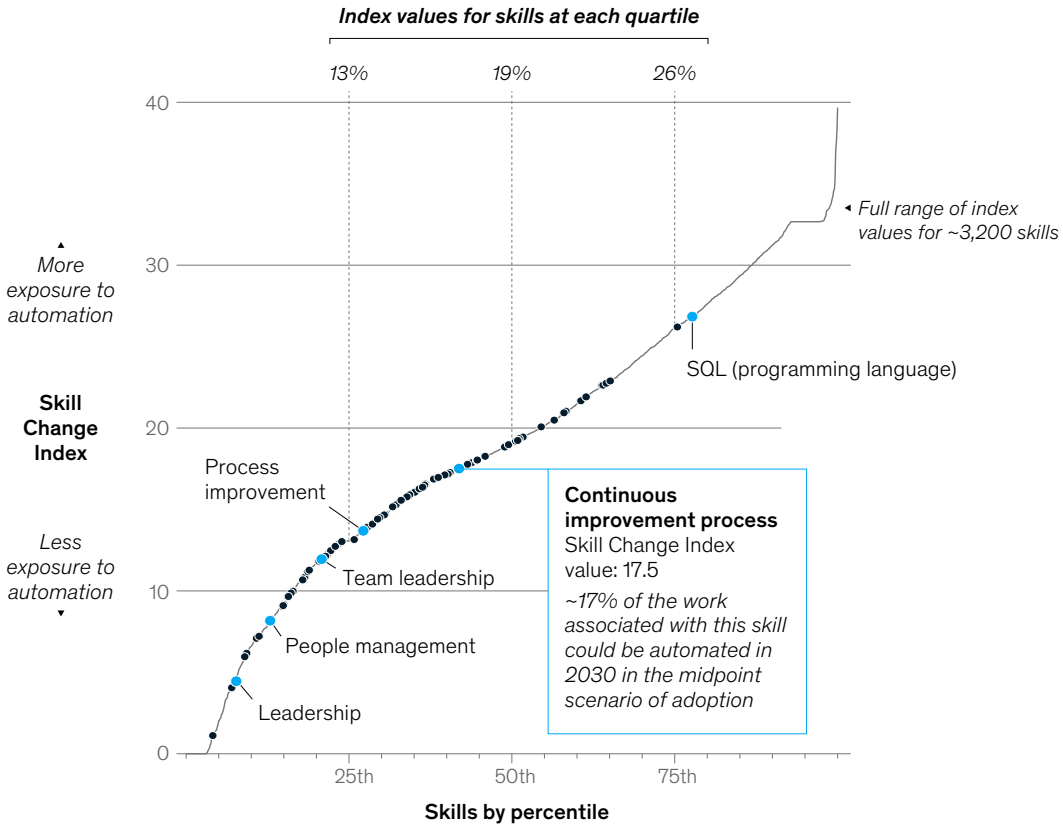
~80% *of demand for AI skills from 5 groups*

~20% *of demand for AI skills from 9 groups*

8 groups with no AI skills demand

Skill Change Index,[11] % (0–100 scale)

Circles = index values of top skills



Note: Values are in nominal US dollars. Figures may not sum to 100% due to rounding. Exhibits analyzing AI-related skills demand include only occupations with 30 or more job postings in Q4 2025. [1]Automation potential reflects technological capabilities to perform work. Estimates shown represent the late scenario of expert assessments. In an early scenario, global technical automation potential ranges from 60% to 70% of current work hours. [2]Defined as occupations in which at least 40% of work hours require physical capabilities. [3]Estimated by multiplying occupation-level automation adoption in the 2030 midpoint scenario by full-time equivalents and 2024 wages. [4]Includes customer-facing domains directly involved in delivering products or services. Excludes support domains, except where these constitute core operations within a given sector, for example, finance professionals in the finance and insurance industry. [5]Includes management of companies and enterprises. [6]"People-led" and "AI-led" skills are defined as those used in more than 80% of time spent on associated work activities. [7]At least 1 skill in the subcategory appears in ≥5% of job postings for a given occupation. [8]STEM roles include computer and mathematical; architecture and engineering; life, physical, and social sciences; and healthcare occupations. [9]Employees in jobs requiring AI-related skills may need AI fluency, technical AI skills, or both; totals may not sum. [10]Includes only skills Lightcast categorizes as "artificial intelligence and machine learning" or "natural language processing." [11]Based on the projected 2030 midpoint scenario of automation adoption, aggregated across occupations using employment-based weighting. We exclude skills that could not be linked to work activities within occupations.
Source: Eurostat; INE; Lightcast; Ministerio de Desarrollo Social y Familia, Encuesta de Caracterización Socioeconómica Nacional (CASEN); O*NET; McKinsey Global Institute analysis

McKinsey & Company

Colombia

About 55 percent of Colombia's current work hours could be automated using existing technologies, slightly below the regional average. By 2030, Colombia's automation opportunity could reach roughly $27 billion in annual economic value, among the largest in Latin America. Demand for AI-related skills, however, is rising more slowly than in the other countries covered by our regional labor market analysis.

55%
Share of current work hours technically automatable with existing technology

$27 billion
Estimated economic value from automation adoption by 2030, midpoint scenario

80%
Share of human skills that will endure for people amid automation

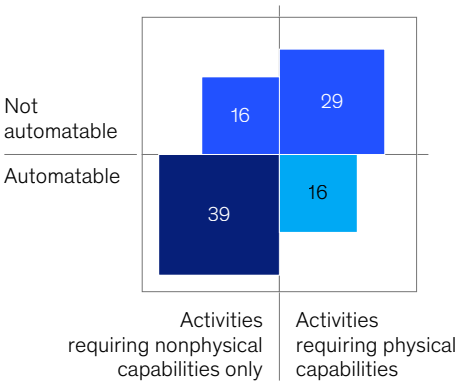
3.7×
People in jobs requiring AI fluency in 2025 vs 2023

Automation could change how work gets done in Colombia.

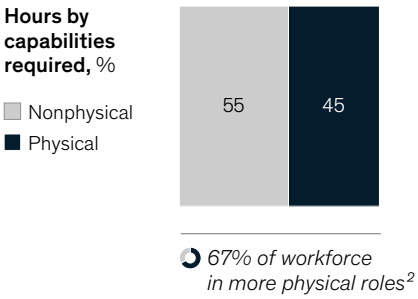
Distribution of work hours, 2024

Share of work that could be done by:
People Agents Robots

Hours by technical automation potential,[1] %

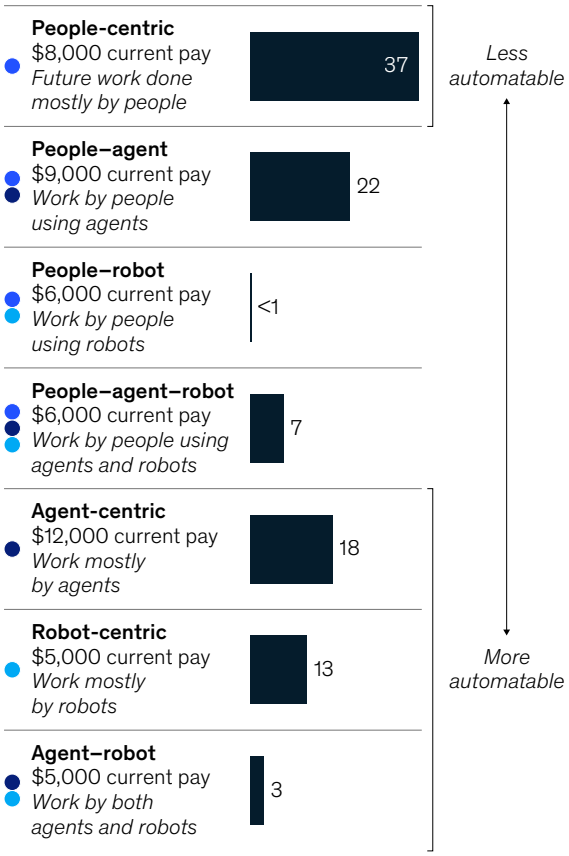


Hours by capabilities required, %

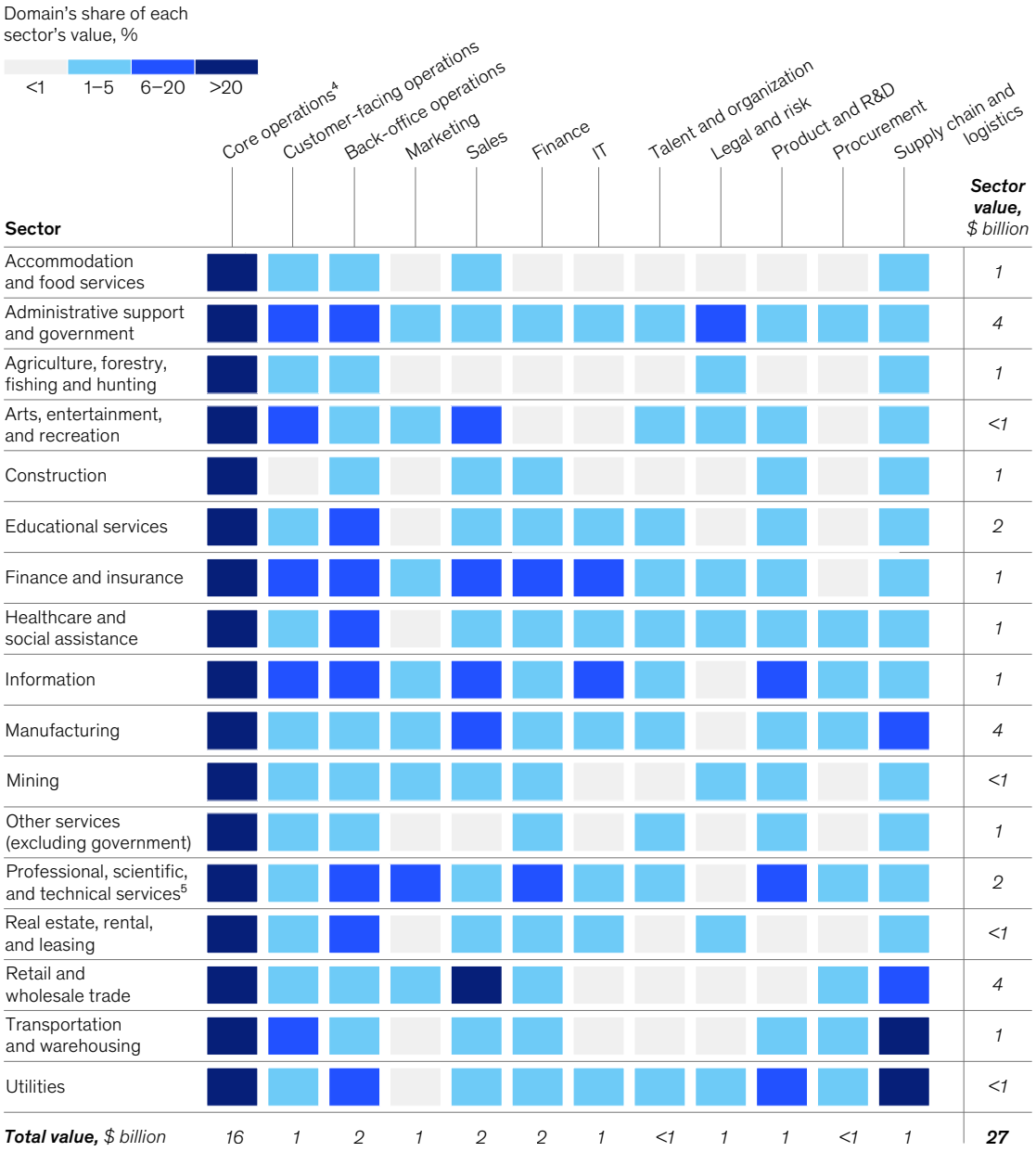


67% of workforce in more physical roles[2]

Distribution of workforce across occupation archetypes, 2024, %



Economic value by sector and domain at 13% automation adoption, 2030 midpoint scenario[3]

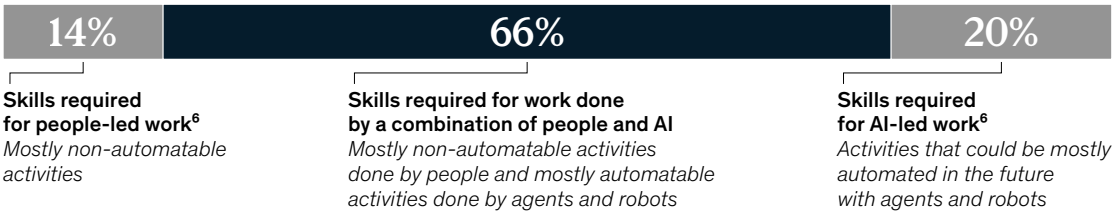


Sector	Sector value, $ billion
Accommodation and food services	1
Administrative support and government	4
Agriculture, forestry, fishing and hunting	1
Arts, entertainment, and recreation	<1
Construction	1
Educational services	2
Finance and insurance	1
Healthcare and social assistance	1
Information	1
Manufacturing	4
Mining	<1
Other services (excluding government)	1
Professional, scientific, and technical services[5]	2
Real estate, rental, and leasing	<1
Retail and wholesale trade	4
Transportation and warehousing	1
Utilities	<1
Total value, *$ billion*	**27**

	Core operations[4]	Customer-facing operations	Back-office operations	Marketing	Sales	Finance	IT	Talent and organization	Legal and risk	Product and R&D	Procurement	Supply chain and logistics
Total value, *$ billion*	16	1	2	1	2	2	1	<1	1	1	<1	1

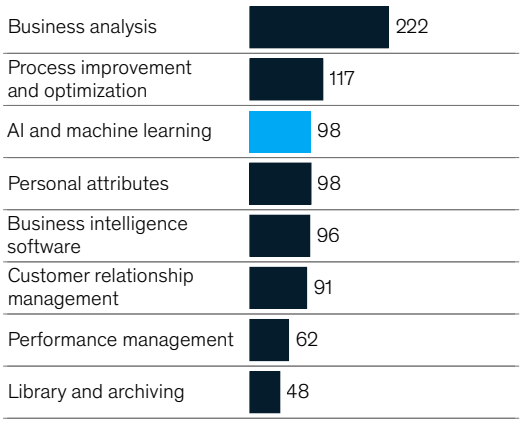
AI will reshape skills in Colombia's workforce.

Distribution of ~7,000 skills by technical automation potential, 2024

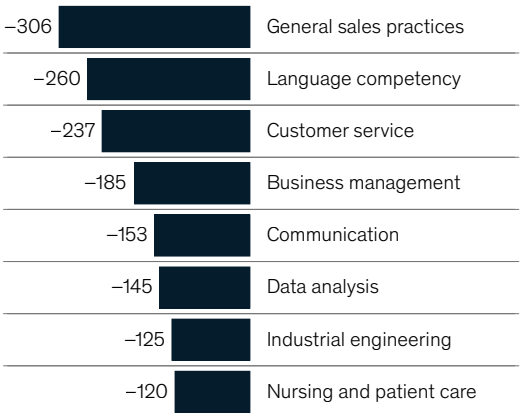


Change in occupations with postings mentioning each skill subcategory, 2023–25[7]

Greatest increases



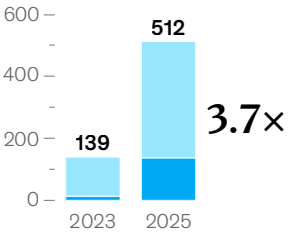
Greatest decreases



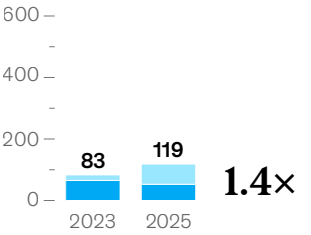
Employees in occupations with AI-related skills in at least 5% of postings, thousand

Occupation type: STEM[8] Non-STEM

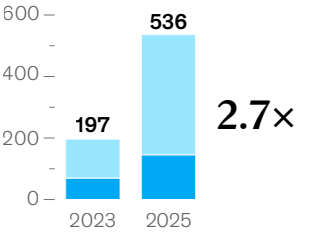
AI fluency skills
Using or managing AI



Technical AI skills
Developing or governing AI



Any AI-related skills[9]



Employees in occupations with AI-related skills in at least 5% of postings[10]

Employees in occupations with AI-related skills in at least 5% of postings[10]

Occupation type: STEM Non-STEM

Occupation group	Total FTE workers, thousand	Workers whose jobs require AI skills: Share, %	Workers whose jobs require AI skills: Count, thousand
Management	2,585	6	154
Computer and mathematics	389	30	118
Arts, design, entertainment, sports, and media	363	17	62
Business and financial operations	841	6	50
Sales and related	3,960	1	41
Office and administrative support	1,925	1	26
Educational instruction and libraries	436	6	25
Architecture and engineering	454	4	18
Legal	360	4	14
Protective services	929	1	11
Production	1,580	<1	7
Healthcare practitioners and technical	458	1	5
Life, physical, and social sciences	201	2	4
Installation, maintenance, and repair	505	<1	1
8 other groups	7,934	—	0

~80% *of demand for AI skills from 5 groups*

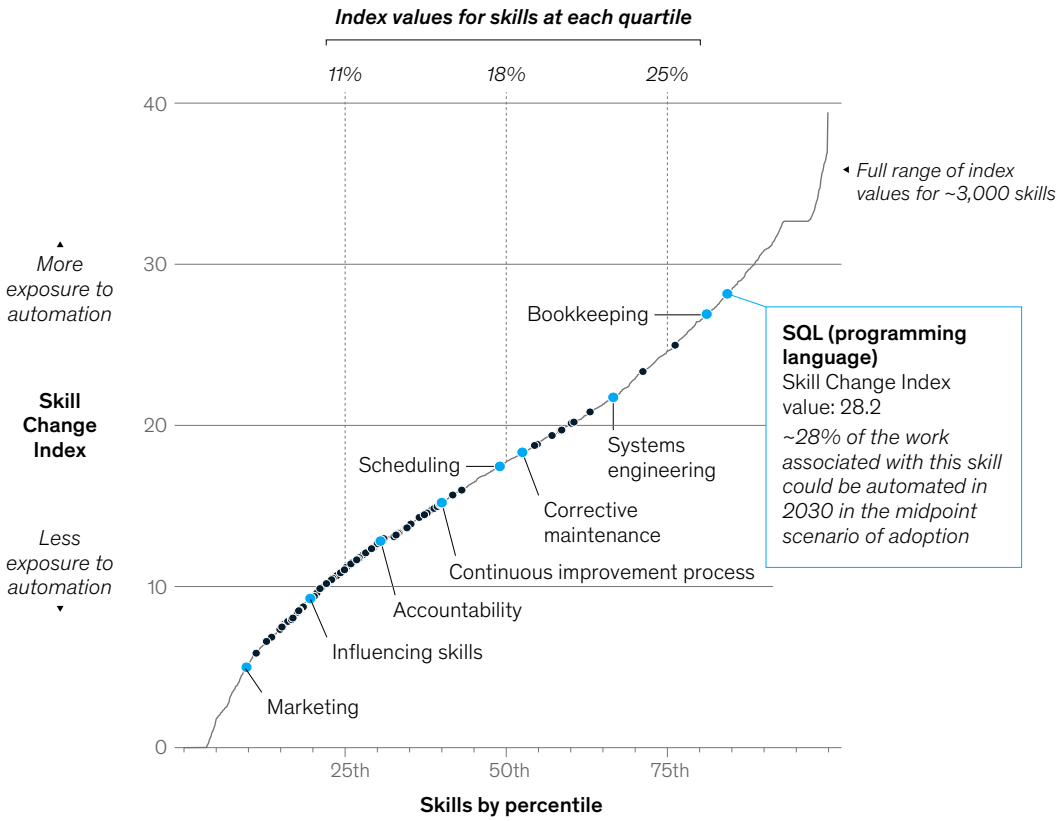
~20% *of demand for AI skills from 9 groups*

8 groups with no AI skills demand

Skill Change Index,[11] % (0–100 scale)

Skill Change Index,[11] % (0–100 scale)

Circles = index values of top skills



Note: Values are in nominal US dollars. Figures may not sum to 100% due to rounding. Exhibits analyzing AI-related skills demand include only occupations with 30 or more job postings in Q4 2025. [1]Automation potential reflects technological capabilities to perform work. Estimates shown represent the late scenario of expert assessments. In an early scenario, global technical automation potential ranges from 60% to 70% of current work hours. [2]Defined as occupations in which at least 40% of work hours require physical capabilities. [3]Estimated by multiplying occupation-level automation adoption in the 2030 midpoint scenario by full-time equivalents and 2024 wages. [4]Includes customer-facing domains directly involved in delivering products or services. Excludes support domains, except where these constitute core operations within a given sector, for example, finance professionals in the finance and insurance industry. [5]Includes management of companies and enterprises. [6]"People-led" and "AI-led" skills are defined as those used in more than 80% of time spent on associated work activities. [7]At least 1 skill in the subcategory appears in ≥5% of job postings for a given occupation. [8]STEM roles include computer and mathematical; architecture and engineering; life, physical, and social sciences; and healthcare occupations. [9]Employees in jobs requiring AI-related skills may need AI fluency, technical AI skills, or both; totals may not sum. [10]Includes only skills Lightcast categorizes as "artificial intelligence and machine learning" or "natural language processing." [11]Based on the projected 2030 midpoint scenario of automation adoption, aggregated across occupations using employment-based weighting. We exclude skills that could not be linked to work activities within occupations.
Source: Departamento Administrativo Nacional de Estadística (DANE), Gran Encuesta Integrada de Hogares (GEIH); Eurostat; Lightcast; O*NET; McKinsey Global Institute analysis

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Mexico

Mexico's technical automation potential is among the highest in Latin America, at roughly 59 percent. It is also the region's largest automation opportunity, with an estimated $204 billion in annual economic value that could be unlocked by 2030, about one-fifth of it tied to manufacturing. However, demand for AI-related skills is growing more slowly than in most other countries covered by our regional labor market analysis.

59%
Share of current work hours technically automatable with existing technology

$204 billion
Estimated economic value from automation adoption by 2030, midpoint scenario

80%
Share of human skills that will endure for people amid automation

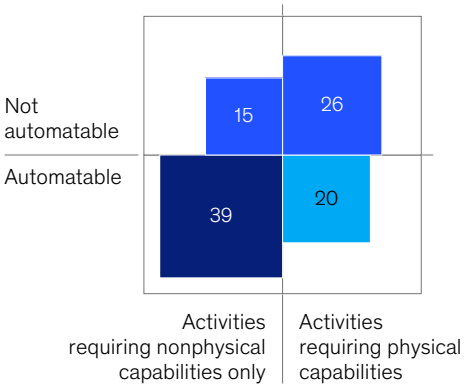
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People in jobs requiring AI fluency in 2025 vs 2023

Automation could change how work gets done in Mexico.

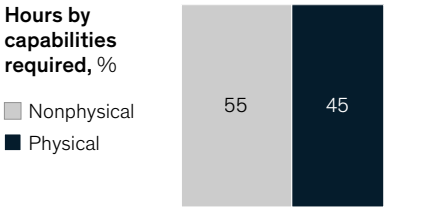
Distribution of work hours, 2024

Share of work that could be done by:
People Agents Robots

Hours by technical automation potential,[1] %

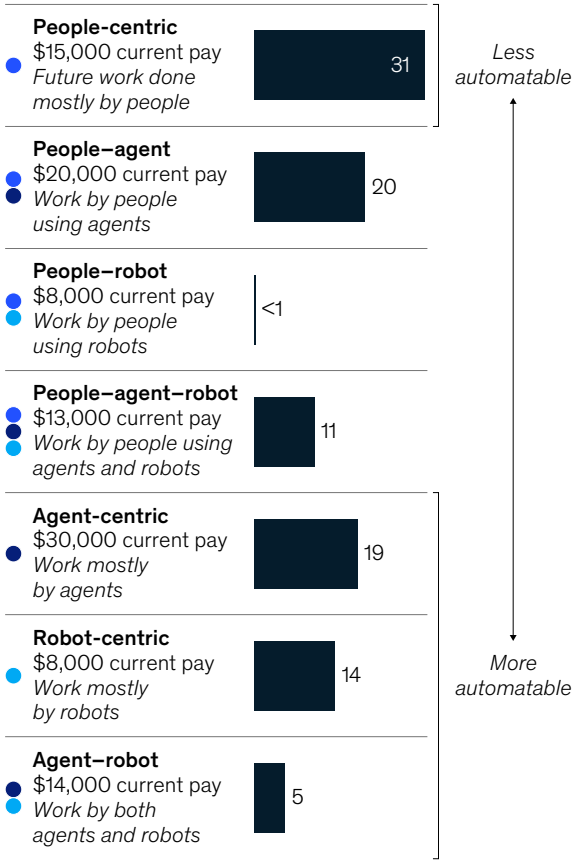


Hours by capabilities required, %



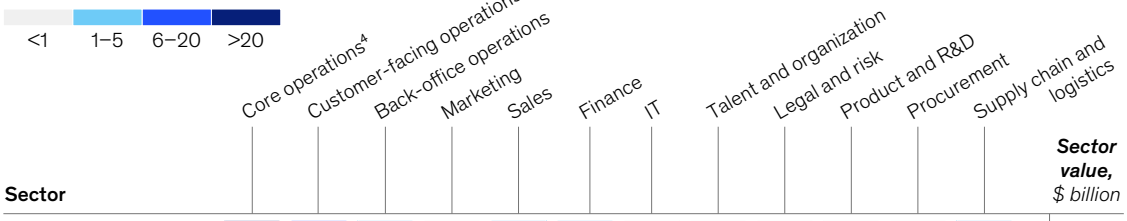
60% of workforce in more physical roles[2]

Distribution of workforce across occupation archetypes, 2024, %



Economic value by sector and domain at 16% automation adoption, 2030 midpoint scenario[3]

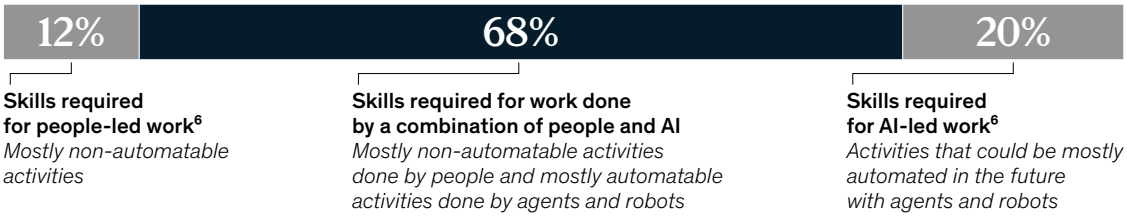
Domain's share of each sector's value, %



Sector	Sector value, $ billion
Accommodation and food services	15
Administrative support and government	27
Agriculture, forestry, fishing and hunting	3
Arts, entertainment, and recreation	4
Construction	11
Educational services	21
Finance and insurance	8
Healthcare and social assistance	7
Information	4
Management of companies and enterprises	1
Manufacturing	38
Mining	1
Other services (excluding government)	11
Professional, scientific, and technical services[5]	17
Real estate, rental, and leasing	3
Retail and wholesale trade	22
Transportation and warehousing	9
Utilities	1
Total value, $ billion	107	14	22	2	6	12	12	6	2	9	5	8	**204**

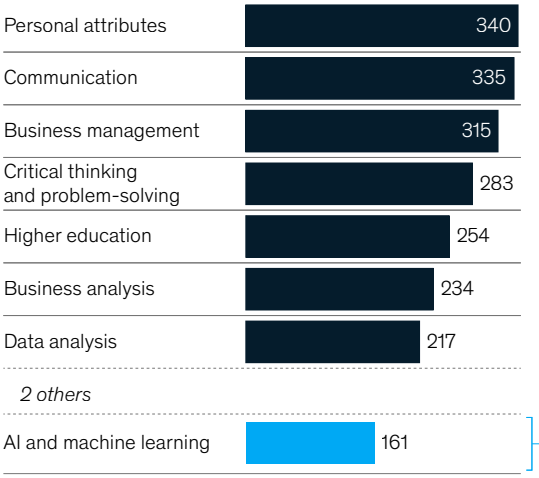
AI will reshape skills in Mexico's workforce.

Distribution of ~7,000 skills by technical automation potential, 2024



Change in occupations with postings mentioning each skill subcategory, 2023–25[7]

Greatest increases

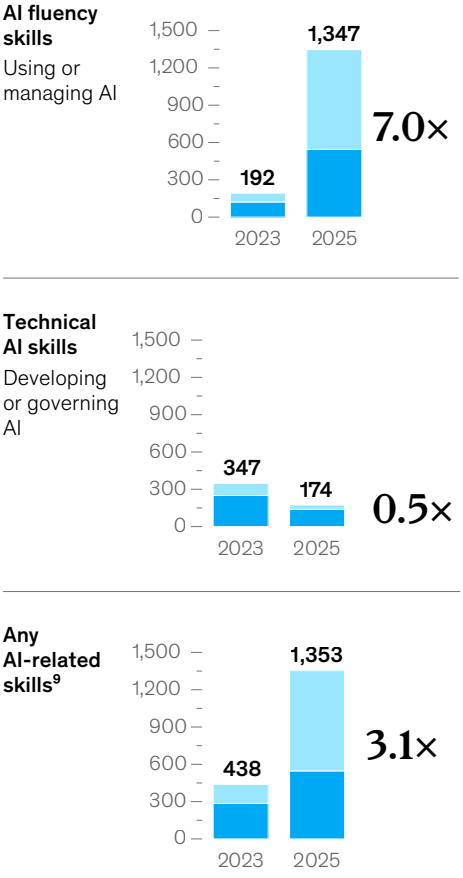


Greatest decreases



Employees in occupations with AI-related skills in at least 5% of postings, thousand

Occupation type: STEM[8] Non-STEM



Employees in occupations with AI-related skills in at least 5% of postings[10]

Occupation type: STEM Non-STEM

Occupation group	Total FTE workers, thousand	Workers whose jobs require AI skills: Share, %	Workers whose jobs require AI skills: Count, thousand
Computer and mathematics	924	49	450
Arts, design, entertainment, sports, and media	1,155	37	424
Management	3,344	4	126
Office and administrative support	4,703	2	88
Architecture and engineering	730	12	87
Sales and related	13,184	<1	61
Business and financial operations	1,692	2	39
Educational instruction and libraries	2,079	2	39
Healthcare support	392	5	19
Life, physical, and social sciences	364	3	12
Legal	655	1	4
Transportation and material moving	6,684	<1	2
Protective services	1,673	<1	2
9 other groups	19,710	—	0

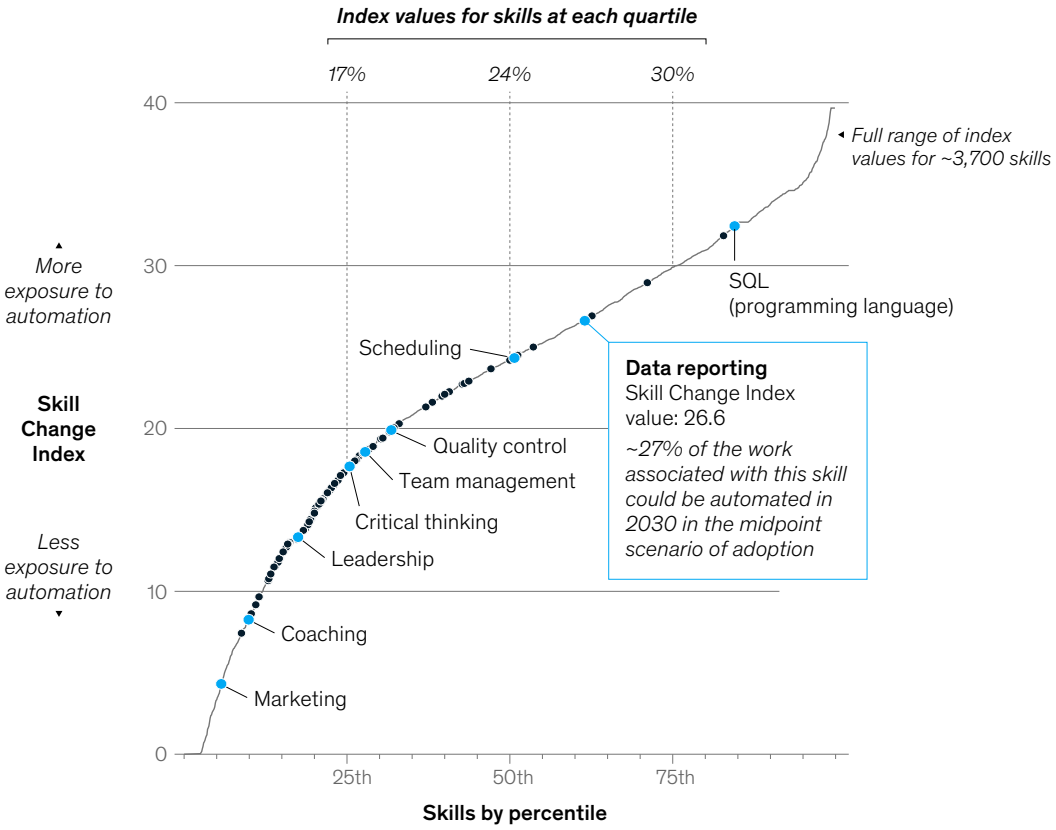
~80% *of demand for AI skills from 4 groups*

~20% *of demand for AI skills from 9 groups*

9 groups with no AI skills demand

Skill Change Index,[11] % (0–100 scale)

Circles = index values of top skills



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Source: Eurostat; Instituto Nacional de Estadística y Geografía (INEGI), Encuesta Nacional de Ocupación y Empleo (ENOE) / Cuestionario de Ocupación y Empleo (COE); Lightcast; O*NET; McKinsey Global Institute analysis

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