

The great strategic pivot: Ambition meets regulation



Executive summary

Brazil has executed the most dramatic strategic turnaround of any region surveyed. In the initial phases of GenAI adoption, Brazilian companies had the world's highest focus on cost-cutting. However, they have now swung 93% toward growth and innovation — effectively abandoning the “efficiency trap” overnight. Yet, this commercial ambition faces a unique and formidable hurdle and 28% of executives cite regulation as their top barrier, the highest rate globally. The story in Brazil is one of massive commercial ambition colliding with regulatory anxiety, creating a high-stakes environment for 2026.

Key narrative themes



From cost-cutter to innovator

The data from Brazil tells a story of a rapid maturity curve. Leaders have realized that while efficiency has a ceiling, growth does not. Consequently, Brazil is now outpacing the rest of the world in its desire to use AI for new product and service innovation (**45%** focus vs. **31%** globally). This indicates a market that is ready to use technology to fundamentally reimagine what they sell, not solely how they sell it.



Long-term commercial optimism

Brazilian executives are arguably the most bullish in the world regarding the long-term financial impact of AI. The region is a statistical outlier in its confidence, with **69%** of respondents projecting a revenue uplift of more than **15%** within the next decade. This is significantly higher than the global average of **45%**, suggesting that Brazilian leaders view AI as the defining lever for their future economic success.



The trust equation

Because regulatory hurdles are high, trust has become the currency of success in Brazil. Transparency isn't a “nice to have” — it is a strategic necessity to navigate the complex legal landscape and gain consumer confidence. This is reflected in the finding that **37%** of leaders prioritize customer trust and brand loyalty as their primary motivation for AI transparency.



A human-centric approach

Brazil is championing the human element of the AI revolution with **95%** of respondents agreeing that people-centered AI initiatives are the most impactful, a figure that sits significantly above the global average. Furthermore, **50%** report a net increase in roles, proving that their growth strategy includes expanding their workforce, not shrinking it.

The verdict

Brazil is ready to launch, but the regulatory runway is crowded. The winners in this market will be the technical innovators, but also the diplomatic ones — those who can balance aggressive growth targets with the stringent compliance required to build trust.



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Unlocking AI's top line growth