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State of Robotics Brazil 2026

Agriculture scale, rising wages, and Latin America's largest manufacturing base — Brazil's robotics inflection point is here. The definitive market analysis from RCSV.

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CONTENTS

Inside this report

- 01 Executive Summary
- 02 Agriculture: Brazil's Automation Showcase
- 03 Automotive: The São Paulo Industrial Belt
- 04 Tech Ecosystem
- 05 Key Companies & Innovators
- 06 Government Programs & Policy
- 07 Investment Landscape
- 08 RCSV + Brazil: Partnership Opportunities

KEY FINDINGS

Brazil by the Numbers

R\$8.2B

Brazilian robotics & automation market in 2026 (~US\$1.6B) — the largest in Latin America by a wide margin.

18

Robots per 10,000 manufacturing workers — far below the global average of 151. Massive headroom for growth.

3rd

Brazil's rank in Latin America's tech startup ecosystem by VC count — but #1 by total market cap.

52%

Year-over-year growth in Brazilian robotics investment in 2025 — the fastest acceleration in Latin America.

CHAPTER 01

Executive Summary

Brazil is at a robotics inflection point. Latin America's largest economy (\$2.1 trillion GDP), its most industrialized nation, and the world's leading exporter of soybeans, beef, and chicken, Brazil combines the agricultural scale, manufacturing base, and rising wage pressure that have historically preceded automation surges in every major economy.

Yet with just 18 robots per 10,000 manufacturing workers — barely one-eighth of the global average of 151 — Brazil remains dramatically under-automated. The gap is not a failure of ambition. It is a consequence of structural factors: punitive import tariffs that can double the landed cost of a robot arm, a complex regulatory environment that slows capital allocation, and a university pipeline that produces far fewer robotics engineers than the market demands.

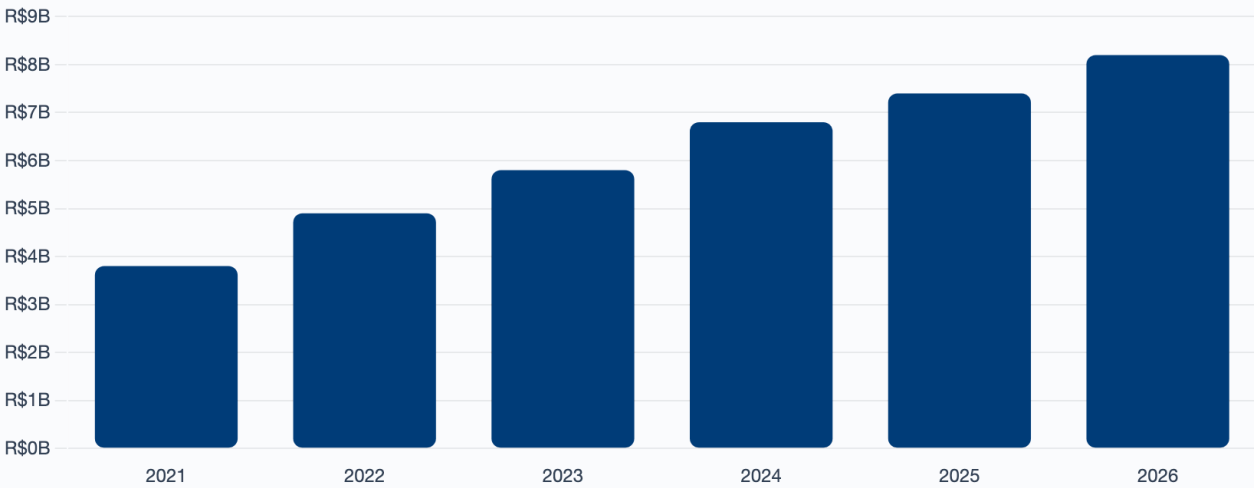
What has changed in 2024–2026 is the convergence of three forces that make the automation case impossible to ignore:

- **Agricultural technology leadership.** Brazil's farm scale — average farms in Mato Grosso exceed 5,000 hectares — creates unit economics for precision agriculture and drone spraying that work nowhere else on Earth. With 45,000 agricultural drones now operating (second only to China), Brazil has become a global showcase for agricultural automation.
- **Automotive modernization.** Stellantis's R\$30 billion investment through 2030, new EV platform rollouts at Volkswagen and GM, and the Rota 2030 policy framework are forcing a generational automation upgrade across the São Paulo industrial belt.
- **A booming tech startup scene.** São Paulo hosts 15,000+ tech companies — comparable to Berlin in scale — and a wave of domestic robotics companies (Auttom, Horus, Interactions) are attacking the import cost barrier by building locally.

The R\$8.2 billion (~\$1.6B) Brazilian robotics market grew to become Latin America's largest in 2026, and total robotics investment hit R\$2.8 billion in 2025 — a 52% year-over-year increase that outpaced every other country in the region. This report examines the sectors, companies, policies, and investment flows driving that acceleration.

Bottom line: Brazil's combination of world-leading agricultural export scale, a large automotive manufacturing base undergoing EV-driven modernization, and a startup ecosystem that is beginning to produce domestic robotics hardware makes it the highest-potential robotics market in Latin America — and one of the most underrated globally.

Brazilian Robotics Market (R\$ Billions)



Source: RCSV Research, ABIMAQ, IFR Latin America

CHAPTER 02

Agriculture: Brazil's Automation Showcase

If Australia's mining sector is the global reference case for autonomous vehicles in extractive industries, Brazil's agricultural sector is the equivalent showcase for precision agriculture and field robotics. The numbers are staggering: Brazil is the world's #1 exporter of soybeans, beef, and chicken; #1 in orange juice; #2 in sugar and coffee. This is not niche production — it is commodity farming at a scale that makes automation economics work decisively.

Precision Agriculture at Scale

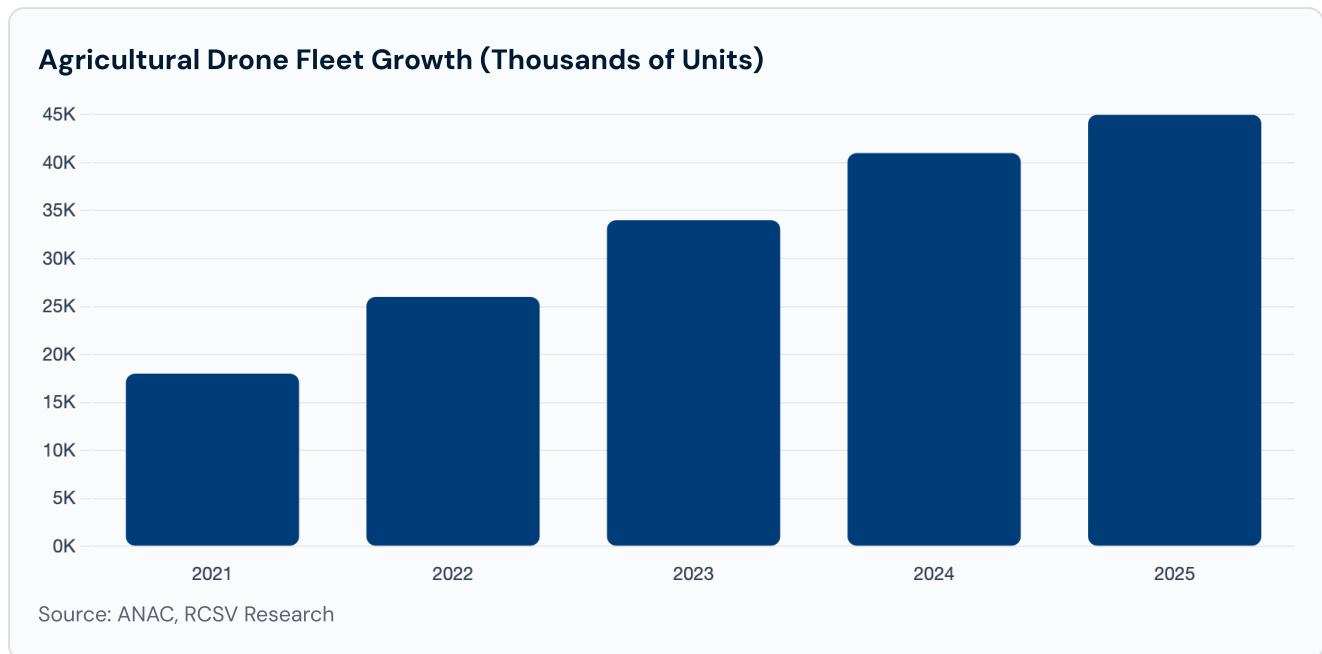
The Cerrado region — spanning Mato Grosso, Goiás, Minas Gerais, and Bahia — is the heartland of Brazilian row-crop agriculture. Average farm size in Mato Grosso exceeds 5,000 hectares, an order of magnitude larger than the US Midwest average. At this scale, even marginal improvements in input application precision (fertilizer, herbicide, seeding density) translate into millions of reais in annual savings per farm.

John Deere Brazil — the company's largest non-US market — has deployed AutoTrac GPS guidance on 80%+ of large farms in Mato Grosso. CNH Industrial and AGCO both operate major R&D and manufacturing facilities in Brazil. The precision agriculture supply chain is deep: GPS correction networks, variable-rate application controllers, yield monitors, and telemetry platforms are all locally available and actively serviced.

Agricultural Drone Density

Brazil is the world's second-largest market for agricultural drones after China, with approximately 45,000 units operating under ANAC (National Civil Aviation Agency) authorization as of 2025. DJI Agras is the dominant platform, but domestic manufacturers including Horus Aeronaves are building Brazil-specific solutions optimized for Cerrado conditions.

Drone spraying is most prevalent in sugar cane, soybean, and cotton operations. The economics are compelling: drone application costs approximately R\$15–25 per hectare versus R\$40–60 for traditional ground-based spraying, with the additional benefit of reduced soil compaction and more precise application in irregular terrain.



Harvest Mechanization

Sugar cane harvesting in São Paulo state is 95%+ mechanized, driven by environmental legislation banning pre-harvest burning and the deployment of Case IH autochoppers. This is one of the world's most advanced mechanical harvesting programs, and the operational data generated by these fleets is a largely untapped resource for training next-generation autonomous harvest systems.

Startups and Acquisitions

The Brazilian agtech ecosystem has produced several companies of global significance:

- **Solinftec** — real-time farm operations platform, acquired by CNH Industrial; processing data from 30M+ hectares
- **Aegro** — farm management software widely used by mid-size operations in Mato Grosso and Paraná
- **Strider** — pest monitoring platform, acquired by BASF; integrated into BASF's global digital agriculture portfolio
- **FarmHack** — precision irrigation and soil analytics for Cerrado operations
- **Horus Aeronaves** (Belo Horizonte) — agricultural drones and aerial data platform for large-scale crop monitoring

Embrapa (Brazilian Agricultural Research Corporation), a federal agency with 9,500 employees, operates a dedicated precision agriculture and robotics division. Its research stations serve as testbeds for autonomous field operations, data-driven crop management, and robotic phenotyping — making Embrapa one of the world's most significant institutional actors in agricultural robotics R&D.

Key insight: Brazil's agricultural automation story is not an aspirational narrative — it is an operating reality at massive scale. The combination of 45,000 drones, 95%+ mechanized sugar cane harvesting, and GPS-guided precision agriculture across millions of hectares makes Brazil one of the top three countries globally for deployed agricultural robotics, alongside China and the United States.

CHAPTER 03

Automotive: The São Paulo Industrial Belt

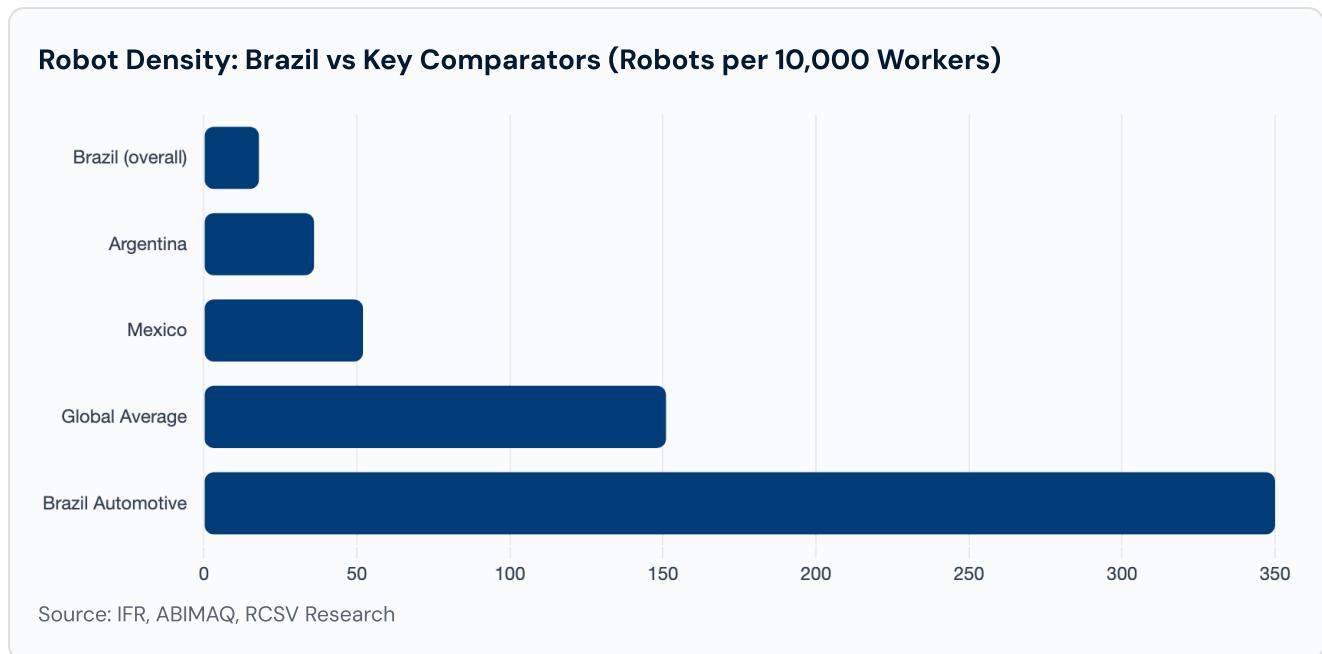
Brazil is the world's 7th-largest automobile producer, manufacturing approximately 2.3 million vehicles annually. The São Paulo state ABC region — Santo André, São Bernardo do Campo, and São Caetano do Sul — is Brazil's Detroit: a dense cluster of final assembly, stamping, powertrain, and supplier operations that has been the backbone of the country's industrial employment for seven decades.

Major OEM Footprint

OEM	PRIMARY PLANT	EST. WORKFORCE	KEY PROGRAMS
Volkswagen	São Bernardo do Campo, SP	15,000	Brazil's largest industrial employer; Polo, T-Cross, Saveiro
Stellantis	Betim, MG + Santo André, SP	12,000+	R\$30B investment through 2030; Bio-Hybrid platform, Fiat Pulse EV
General Motors	São José dos Campos, SP	8,000	S10, Tracker; Ultium platform arriving 2027
Toyota	Indaiatuba, SP	3,500	Corolla, Corolla Cross; expanding hybrid production
Honda	Sumaré, SP	3,000	Civic, HR-V; City EV under evaluation
Renault	São José dos Pinháis, PR	4,500	Kwid, Duster; EV line investment planned

Robot Density: A Tale of Two Economies

Brazil's overall robot density of 18 per 10,000 workers conceals a dramatic split. Within the automotive sector, robot density reaches 350 per 10,000 workers — a figure that is competitive with mid-tier European automotive nations. Outside automotive, density drops to single digits. This bifurcation is the clearest illustration of what import tariff reduction and targeted industrial policy can achieve when applied to a specific sector.



EV Transition as Automation Catalyst

The electric vehicle transition is the single largest automation catalyst for Brazilian manufacturing this decade. Stellantis's R\$30 billion commitment through 2030 includes new EV-native production lines that require fundamentally different automation: battery module assembly, high-precision welding for aluminum structures, and automated quality inspection systems that legacy lines were not designed to accommodate.

This is not a gradual upgrade cycle. New EV platforms require new tooling, new robots, and new integration — effectively creating greenfield automation demand within brownfield facilities. For Brazilian system integrators and robot distributors, the EV transition represents a decade-long revenue opportunity.

Domestic OEM Innovation

Brazilian-owned manufacturers are also investing in automation. Randon (trailer and auto parts) and Marcopolo (buses) both operate automation programs that, while smaller in scale than multinational OEMs, demonstrate that domestic companies are competing on manufacturing sophistication rather than labor cost alone.

Key insight: Brazil's automotive sector proves that robot density approaching world-class levels is achievable in the Brazilian operating environment. The question is whether the conditions that enabled automotive automation — multinational capital, structured policy incentives, and scale — can be replicated in food processing, logistics, and general manufacturing.

CHAPTER 04

Tech Ecosystem

São Paulo is Latin America's largest technology hub, home to more than 15,000 tech companies and comparable to Berlin in ecosystem scale. Every major global technology company — Google, Microsoft, Amazon, IBM, Oracle — operates engineering centers in Brazil, and the country's unicorn class (Totvs, Stefanini, CI&T) increasingly overlaps with automation and industrial AI.

WEG: Brazil's Automation Infrastructure Backbone

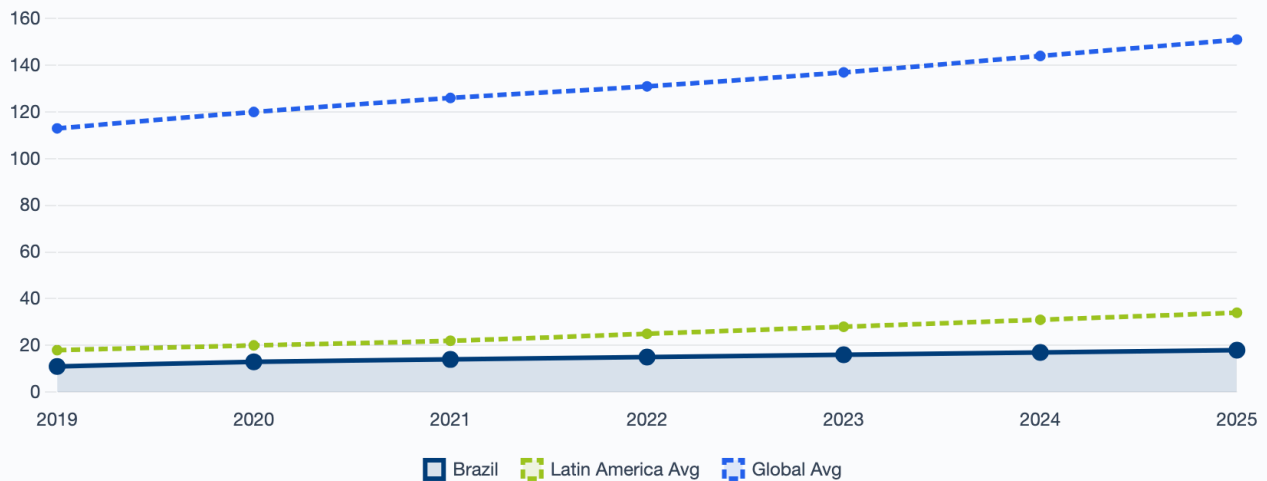
No discussion of Brazilian robotics is complete without WEG. Headquartered in Jaraguá do Sul, Santa Catarina, WEG is a publicly listed company with R\$30 billion+ in annual revenue that manufactures industrial motors, drives, automation components, and energy systems. WEG is to Brazilian manufacturing automation what Siemens is to German industry: the infrastructure backbone on which everything else is built.

WEG's partnership with Rockwell Automation provides factory automation solutions tailored to Brazilian manufacturers, including PLCs, servo drives, and motion control systems. WEG's automation division is also an active strategic acquirer, making it a key consolidator in the domestic market.

Academic and Training Institutions

- **ITA (Instituto Tecnológico de Aeronáutica)** — located in São José dos Campos, ITA is Brazil's MIT equivalent for engineering and aerospace. Its robotics and autonomous systems programs produce a disproportionate share of the country's robotics founders and senior engineers.
- **SENAI (National Industrial Training Service)** — with 500+ centers nationwide, SENAI operates the largest industrial training network in Latin America. Its robotics technician certification programs are critical infrastructure for scaling the automation workforce.
- **CESAR (Recife)** — one of Brazil's top technology institutes, with active programs in robotics, IoT, and embedded systems.
- **USP, UNICAMP, UFMG** — Brazil's leading research universities, all with active robotics labs and growing industry partnership programs.

Brazil Robot Density Over Time (Robots per 10,000 Workers)



Source: IFR, RCSV Research. Latin America avg and global avg shown for comparison.

Emerging Tech Infrastructure

Brazil's 5G rollout — led by Oi, Claro, and Vivo — is creating the connectivity infrastructure required for cloud-connected robotics and real-time teleoperation. São Paulo, Brasília, and Belo Horizonte have functional 5G coverage, with nationwide expansion planned through 2027. This is a prerequisite for the remote monitoring and teleoperation use cases that are most immediately relevant to Brazil's agricultural and industrial sectors.

Key insight: Brazil's tech ecosystem is far deeper than international observers typically recognize. The combination of WEG's industrial automation infrastructure, ITA's engineering talent pipeline, SENAI's 500-center training network, and São Paulo's 15,000-company tech scene provides the institutional foundation for a domestic robotics industry — not just a market for imported hardware.

CHAPTER 05

Key Companies & Innovators

Brazil's robotics ecosystem is transitioning from pure import dependency to a hybrid model where domestic companies address specific segments while international players maintain their presence in high-end industrial automation. Six companies illustrate the range of this emerging landscape.

COMPANY	LOCATION	FOCUS	SIGNIFICANCE
WEG	Jaraguá do Sul, SC	Industrial motors, automation components	R\$30B+ revenue; Brazil's automation backbone; Rockwell partnership
Auttom	São Paulo, SP	Industrial robot arms	Brazilian-made cobots competing on landed cost advantage vs imports
Positivo Tecnologia	Curitiba, PR	Educational robots	Widely deployed in Brazilian schools; building next-gen STEM pipeline
Horus	Belo Horizonte, MG	Agricultural drones + data platform	Cerrado-optimized aerial systems; data analytics for precision agriculture
Interactions	São Paulo, SP	Service robots	Retail and hospitality robots deployed in Brazilian malls and hotels
Embraer X / Eve	São José dos Campos, SP	Autonomous air vehicles	Eve Urban Air Mobility (now public via Archer); Embraer's autonomous systems R&D

Auttom: The Domestic Cobot Play

Auttom, based in São Paulo, manufactures collaborative robot arms locally. This is significant because Brazil's stacked import tariffs (II + IPI + ICMS) can add 50–80% to the landed cost of an imported cobot, making a domestically produced alternative immediately competitive on price even if manufacturing scale is modest. Auttom targets SME manufacturers in the ABC region and São Paulo interior who are priced out of imported automation.

WEG: From Components to Systems

WEG's strategic trajectory is moving from component supplier (motors, drives) toward integrated automation systems. The Rockwell Automation partnership provides PLC and motion control expertise, while WEG's distribution network — the deepest in Brazilian industrial manufacturing — gives it unmatched last-mile reach. WEG's automation division is increasingly being recognized as a potential platform acquirer for Brazilian robotics startups.

Positivo and the Education Pipeline

Positivo Tecnologia's educational robots are deployed in thousands of Brazilian schools, introducing robotics concepts to students years before university. While not a direct commercial robotics player,

Positivo's market position means it is shaping the next generation of Brazilian engineers and operators — a strategic investment in the talent pipeline that will determine whether Brazil can sustain an automation workforce at scale.

Brazil Robot Deployment by Sector 2026



Source: RCSV Research, ABIMAQ, IFR

Key insight: The emergence of domestic robotics manufacturers like Auttom is structurally important. Import tariff reduction would accelerate overall market growth, but in the meantime, domestic production circumvents the tariff barrier — creating a path to affordable automation that does not depend on trade policy reform.

CHAPTER 06

Government Programs & Policy

Brazil's government has deployed a layered set of programs to accelerate industrial automation, ranging from subsidized credit lines to direct R&D co-funding. These programs are meaningful in scale, but they operate within — and sometimes struggle against — the broader regulatory environment that has historically made capital equipment acquisition expensive and slow.

Key Programs

- **BNDES (Brazilian Development Bank)** — R\$10 billion automation and Industry 4.0 credit line for manufacturers. BNDES offers below-market interest rates (currently SELIC-1.5%) for automation capital expenditure, making it the single most important financing mechanism for robot purchases in Brazil.
- **Programa Brasil Mais Produtivo** — government-funded factory automation consulting for SMEs, delivered through SENAI and ABDI (Brazilian Agency for Industrial Development). Targets companies with 10–199 employees — the segment where automation adoption is lowest.
- **EMBRAPII (Brazilian Industrial Research and Innovation Company)** — robotics R&D co-funding through 5 robotics-focused research institutes. EMBRAPII matches private R&D investment 1:1, reducing the effective cost of developing robotics IP in Brazil by half.
- **FINEP / Inova Empresa** — R&D grants and subsidized loans for Brazilian robotics companies. FINEP has funded multiple domestic robotics startups including early-stage hardware development.
- **Rota 2030** — Brazilian automotive policy that includes automation incentives for new EV platforms. Companies meeting energy efficiency and local content requirements receive tax credits that partially offset automation investment costs.
- **Startups Act 2021 (Marco Legal das Startups)** — simplified legal and regulatory structure for tech startups, enabling faster company formation and investor structuring for robotics ventures.

The Import Tariff Problem

This report would not be credible without an honest assessment of the tariff barrier. Importing a robot arm into Brazil subjects the buyer to a stacked set of levies: Imposto de Importação (II, up to 14–20%), Imposto sobre Produtos Industrializados (IPI, 5–15%), ICMS (state value-added tax, 17–25%), and PIS/COFINS (9.25%). The cumulative effect is that Brazilian manufacturers often pay 2–3 times the landed cost of the same robot in the United States.

This is the single largest structural barrier to robotics adoption in Brazil. It prices out SMEs entirely, forces large manufacturers to amortize robots over longer periods, and creates a perverse incentive to maintain labor-intensive processes even when the automation ROI would be positive at global equipment prices.

"Custo Brasil" and Tax Reform

The broader regulatory environment — colloquially known as "Custo Brasil" — encompasses a complex tax system, labor regulations that increase effective hourly costs by 70–100% above base wages, and administrative requirements that slow procurement. The ongoing tax reform (2023–2026) is gradually simplifying the tax structure by replacing multiple state and federal levies with a unified dual-VAT system (IBS + CBS), which should reduce compliance costs and improve capital equipment procurement timelines.

Honest assessment: Government programs are meaningful and well-targeted. BNDES financing, EMBRAPA R&D matching, and Rota 2030 automotive incentives collectively represent billions of reais in support. But they are fighting against a tariff and regulatory structure that remains the primary constraint. Until import tariffs on industrial robots are materially reduced, Brazil's automation growth rate will be structurally limited relative to its economic potential.

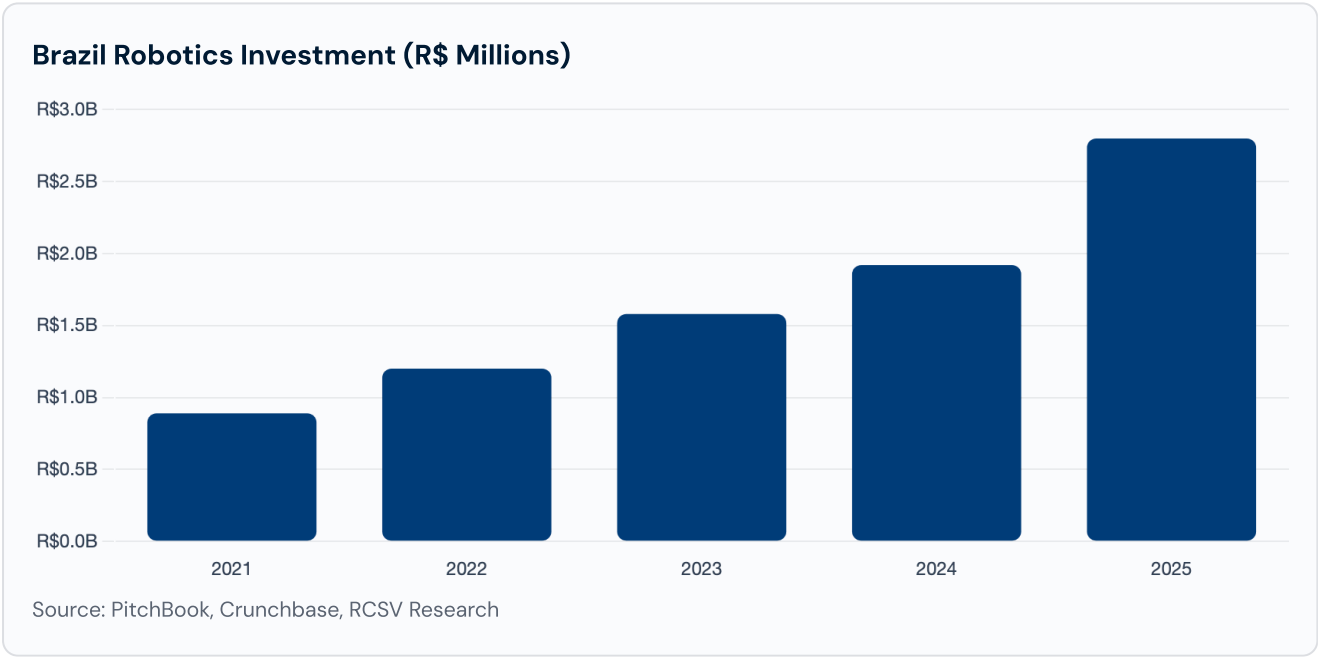
CHAPTER 07

Investment Landscape

Total robotics and automation investment in Brazil reached R\$2.8 billion (~US\$560 million) in 2025, a 52% year-over-year increase that made Brazil the fastest-accelerating robotics investment market in Latin America. This number includes venture capital, corporate R&D, government co-funding, and BNDES-financed capital equipment purchases.

Key Investors

- **SoftBank Latin America Fund (\$5B)** — the largest VC fund in the region, with an active robotics and automation portfolio. SoftBank's presence has catalyzed follow-on investment from other global funds.
- **Kaszek Ventures** — Latin America's most active early-stage fund, with increasing interest in deep tech including robotics.
- **Monashees** — São Paulo-based fund with agtech and industrial tech portfolio companies.
- **Valor Capital Group** — cross-border US-Brazil fund, well-positioned to facilitate international robotics partnerships.
- **Canary** — early-stage Brazilian fund with a growing hardware and deep tech thesis.



Strategic Acquirers

Several large companies are active as strategic acquirers in Brazilian robotics and automation:

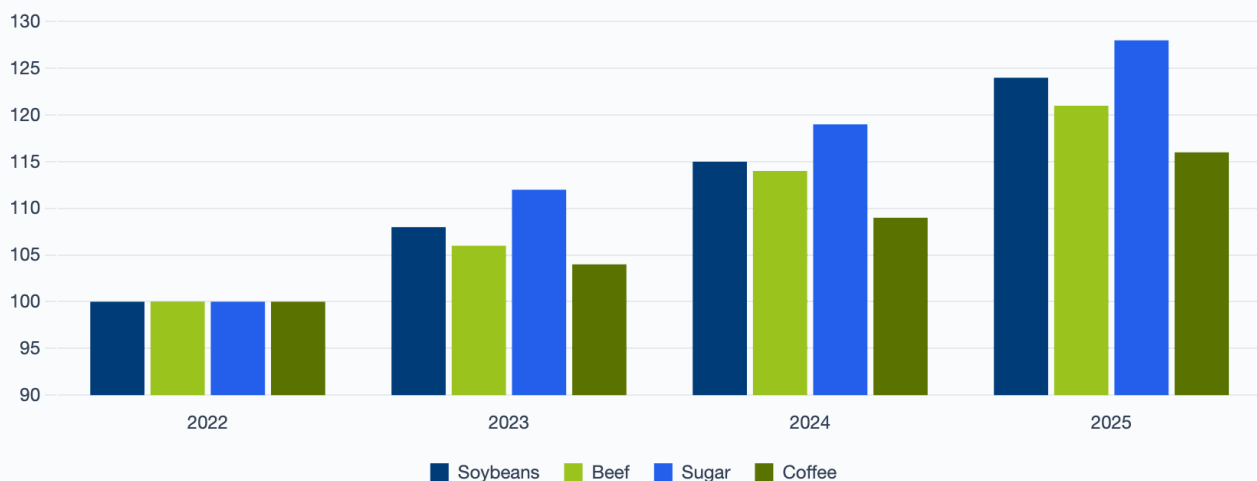
- **WEG** — automation division acquiring complementary technologies; deepest distribution reach in Brazilian industry

- **John Deere Brazil** — significant R&D investment in precision agriculture; largest non-US John Deere market
- **CNH Industrial** — acquired Solinftec; building integrated precision agriculture platform for Brazilian operations
- **BASF** — acquired Strider; integrating Brazilian pest-monitoring technology into global digital agriculture portfolio

Agricultural Tech: The Open Sector

Agricultural technology is Brazil's most investable robotics vertical for international capital. Unlike defense-adjacent industrial sectors, agtech faces minimal foreign investment restrictions. The sector is well-understood by global VCs (many of whom have agriculture exposure through US and European portfolios), the exit paths are proven (CNH/Solinftec, BASF/Strider), and the total addressable market is driven by Brazil's structural position as the world's largest agricultural exporter.

Brazilian Exports Requiring Automation — Volume Index



Source: CONAB, USDA, RCSV Research. Index: 2022 = 100.

Key insight: Brazil's 52% YoY investment growth is notable, but the absolute numbers remain small relative to Brazil's GDP. R\$2.8 billion in total robotics investment for an economy of R\$10+ trillion suggests the market is still in very early innings. The structural under-investment, combined with proven government financing mechanisms (BNDES) and an active VC ecosystem, creates a compelling entry point for international investors and robotics companies.

CHAPTER 08

RCSV + Brazil: Partnership Opportunities

Robotics Center views Brazil as a priority market. The country's combination of agricultural scale, manufacturing depth, and tech ecosystem maturity creates multiple natural partnership opportunities that align directly with Robotics Center's core capabilities in robot distribution, data collection, and teleoperation services.

Agricultural Data Collection at Scale

Brazil's farm scale — operations of 5,000+ hectares with existing GPS infrastructure and drone fleets — makes it an ideal environment for large-scale robotic data collection. Robotics Center's [data collection services](#) can support agricultural robotics companies and research institutions (including Embrapa) in building the training datasets required for next-generation autonomous field operations.

Specific opportunities include: aerial survey data pipelines for crop monitoring, ground robot navigation datasets for row-crop environments, and harvest teleoperation data for sugar cane and citrus operations.

Teleoperation Workforce

Brazil has a large, technically capable, English/Portuguese bilingual workforce with hourly rates of \$25–45 — significantly below US rates for comparable technical skills. For teleoperation data collection programs that require human operators to guide robots through task demonstrations, Brazil offers a cost-effective and high-quality labor pool.

RCSV is exploring partnerships with SENAI training centers to develop teleoperation-specific certification programs, creating a pipeline of trained operators who can support both domestic Brazilian robotics programs and international data collection contracts.

São Paulo Tech Community

Robotics Center's [robot catalog](#) and [comparison tools](#) are directly relevant to São Paulo's 15,000+ tech companies, many of which are evaluating robotics platforms for the first time. RCSV will establish a Portuguese-language community engagement program and partner with local events including Campus Party Brasil and FEIMEC (International Trade Fair for Machinery and Equipment) to reach this audience.

Industrial Integration Partnerships

WEG's automation distribution network and SENAI's 500-center training infrastructure are natural partners for Robotics Center's robot distribution and education programs. An RCSV-WEG partnership could make a curated selection of international robotic arms and platforms available through WEG's

existing sales channels — dramatically reducing the go-to-market friction for entering the Brazilian market.

Get in touch: RCSV is actively seeking partners, customers, and collaborators in Brazil. Whether you are a farm operation evaluating precision agriculture robotics, a manufacturer exploring automation, an investor assessing the Brazilian robotics market, or a researcher building training datasets — we want to hear from you.

English: contact@roboticscenter.ai | roboticscenter.ai/contact

Português: Consultas em português são bem-vindas. Envie um e-mail para contact@roboticscenter.ai com assunto "Brasil" e responderemos em português.

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