



# Two Futures for Jobs in an AI era

2026 Global AI Jobs Barometer

Brazil Analysis



# Key findings

## AI is driving productivity, accelerating skills change and starting to create a redesign of entry level work

### AI is strongly linked to significant productivity gains

Since 2022 when AI use soared, companies in the sectors most exposed to AI have tripled their lead in workforce productivity growth over the least AI-exposed companies.

### Companies achieving the biggest productivity gains are boosting wages and headcount

Rather than replacing jobs at scale, leading organisations are using AI to amplify human performance and create value.

### Harnessing AI is accelerating skills transformation

Skills required for the most AI exposed jobs are changing twice as fast as in least exposed roles - a 75% increase over last year's gap.

### Redesigned entry level pathways

AI exposed junior roles are 7x more likely (than the least AI exposed junior roles) to demand traditionally senior skills like leadership and strategic thinking.

### A two-track labour market

Jobs professionalised by AI – where AI does the basic work leaving more expert tasks for people (22% of advertised jobs) - are thriving while jobs democratised by AI – where AI takes on the complex work (52% of advertised jobs) - fall behind.

40%

Productivity growth is 40% higher at most vs least AI exposed companies.

52%

The most AI exposed companies see faster headcount growth than the least AI exposed (52% vs 36%) and higher wage growth (24% vs 17%).

2.5x

The most AI exposed jobs are adding tasks that rely on human-intensive skills like empathy, judgment and creativity 2.5x faster - than the least AI exposed roles.

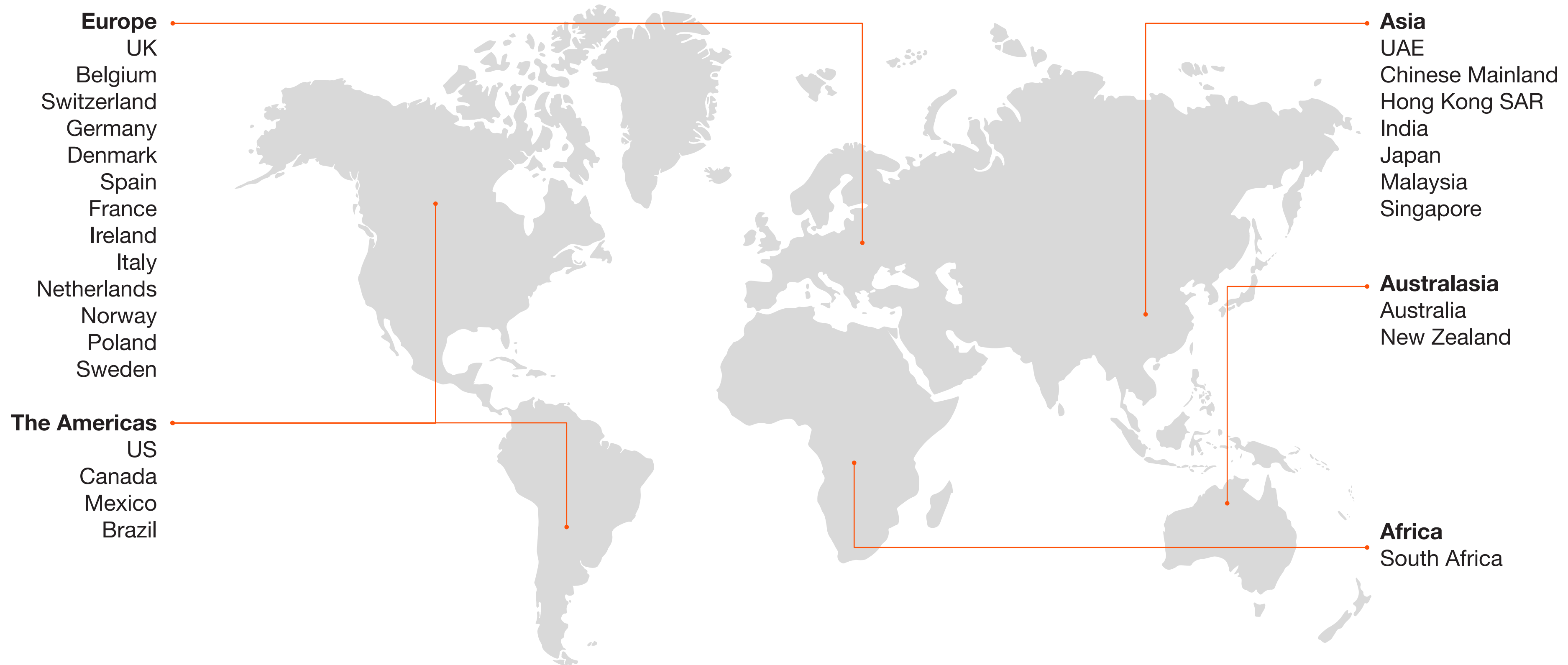
35%

AI-exposed 'seniorised' entry level roles are thriving with 35% growth since 2019 while other entry level roles decline in number.

42%

Professionalised jobs are growing twice as fast as Democratised jobs with 42% higher wage growth since 2021.

# The 2026 AI Jobs Barometer examines over one billion job ads from 6 continents to reveal how AI is affecting jobs, skills, wages, and labour productivity

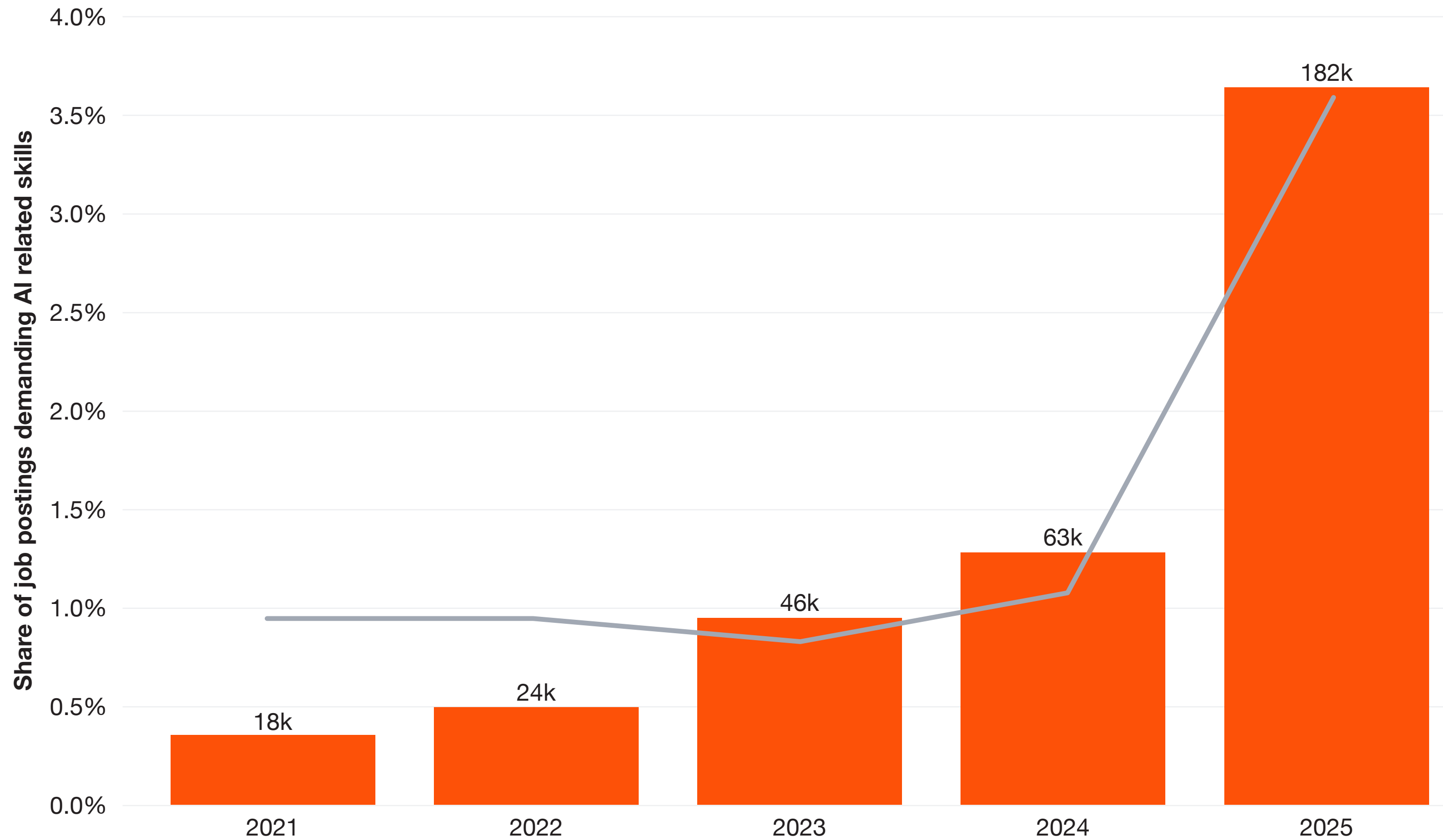


# Brazil Insights



# AI hiring in Brazil has almost tripled in 2025 relative to 2024, indicating increased AI adoption in the workforce

Total number and share of job postings requiring AI related skills, Brazil, 2021-2025



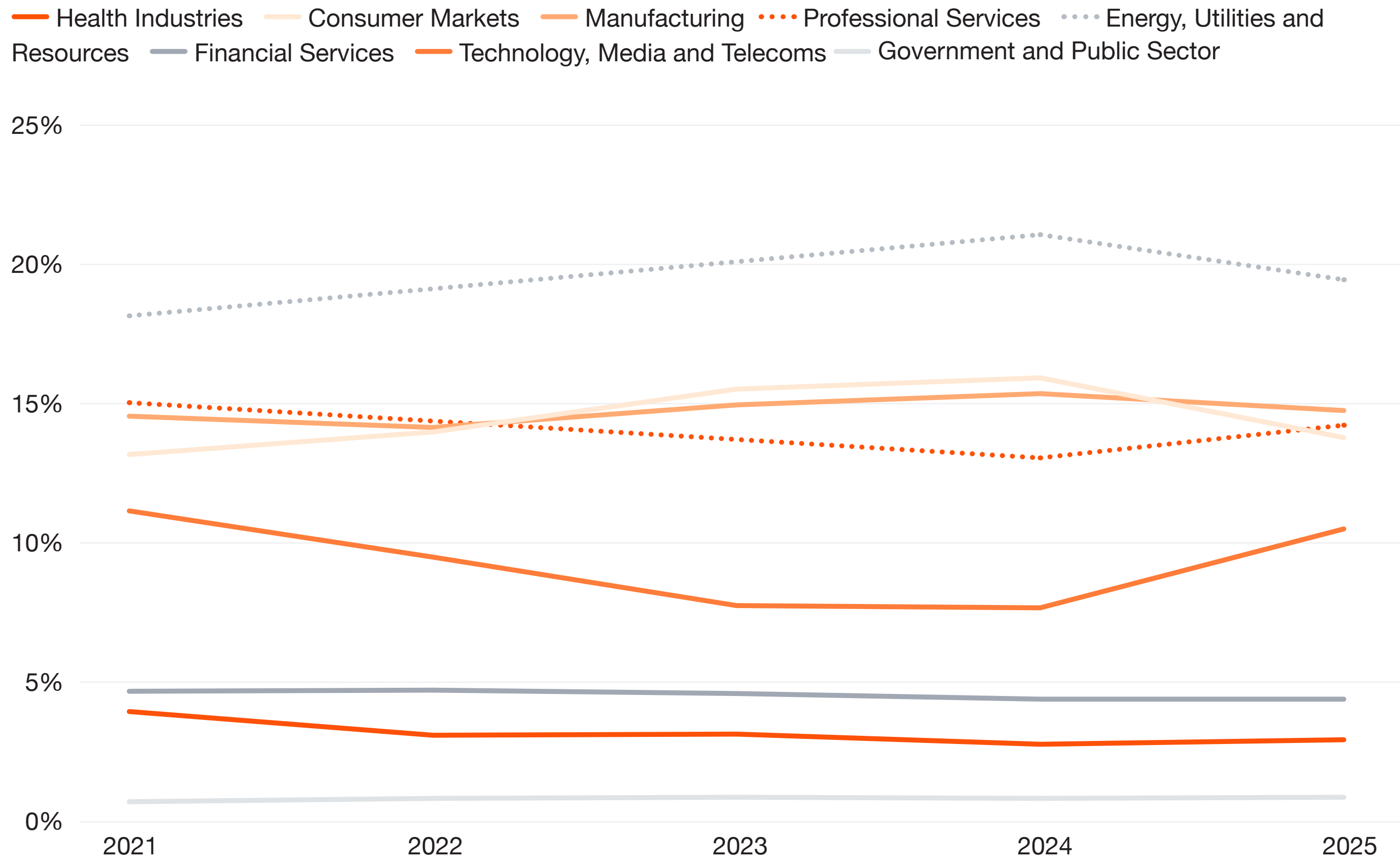
Source: PwC analysis, Lightcast data

## Findings

- The number of job postings in Brazil requiring AI skills increased by around 119k in 2025.
- As a result, the share of job postings requiring AI skills reached 3.6% in 2025, up from 1.1% in 2024.

# Energy, Utilities and Resources accounts for the largest share of job postings in Brazil's labour market

## Share of all job postings by sector, Brazil, 2021-2025



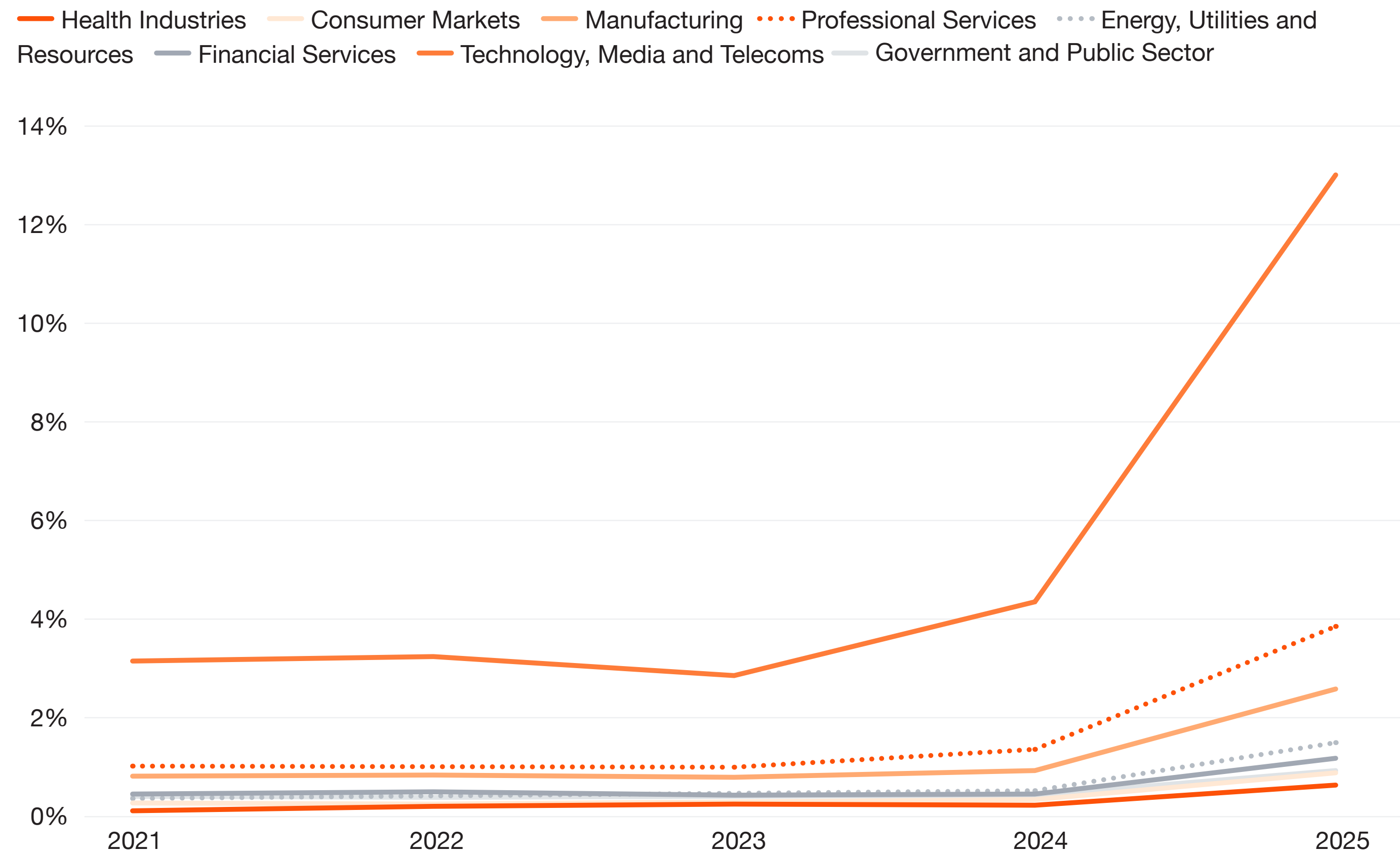
### Findings

- Energy, Utilities and Resources stands out as the largest source of labour demand, accounting for 19.5% of total Brazil job postings.
- Manufacturing (14.8%), Professional Services (14.3%) and Consumer Markets (13.9%) follow close behind as important contributors to labour demand.
- Healthcare and Government & Public Sector record the smallest shares, at 2.9% and 0.8% respectively.

Source: PwC analysis, Lightcast data

# AI hiring intensity is rising across all sectors in Brazil and is led by TMT

## Share of AI job postings within each sector, Brazil, 2021-2025



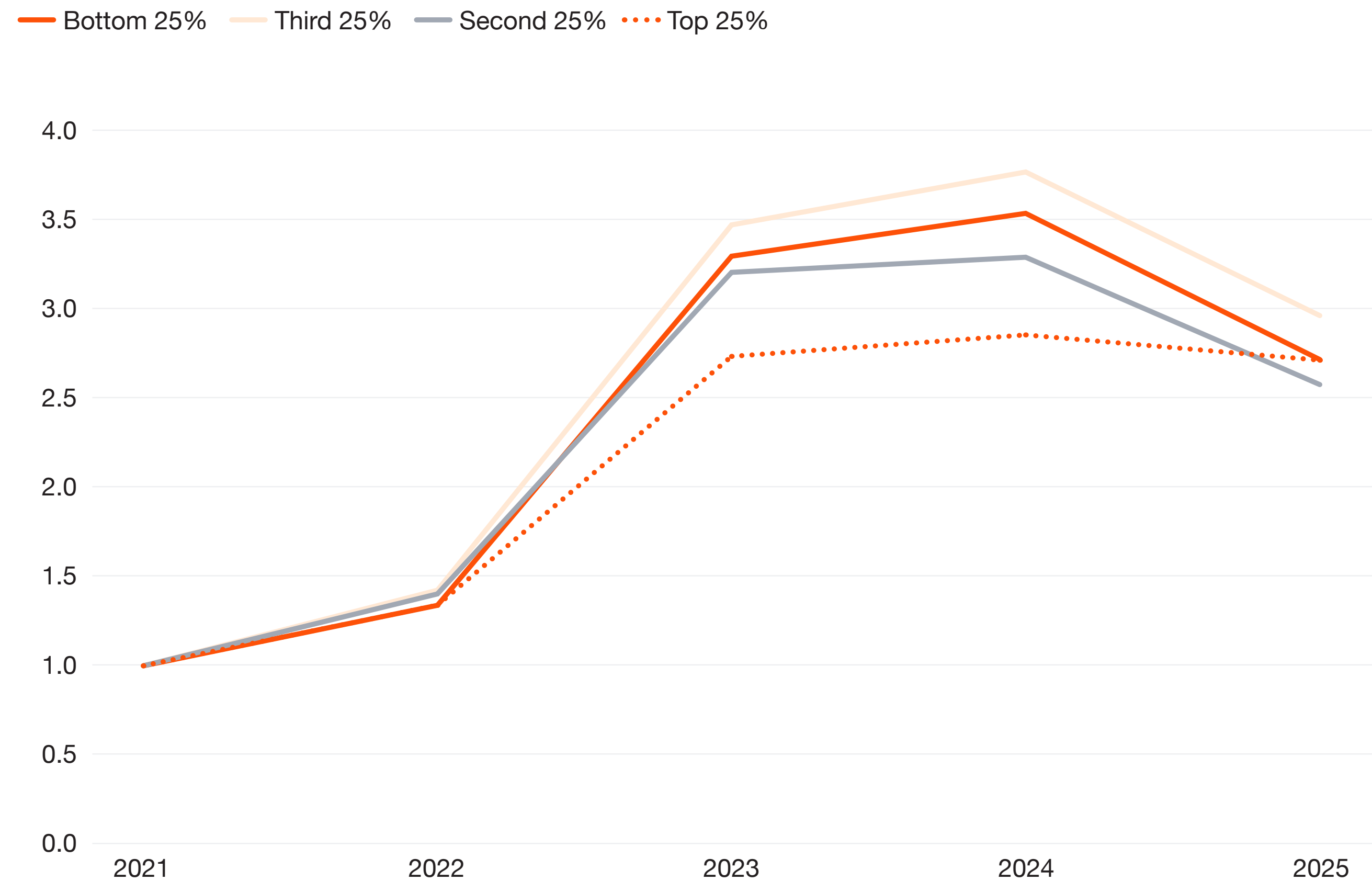
Source: PwC analysis, Lightcast data

## Findings

- Technology, Media and Telecoms (TMT) records the highest share of AI job postings in Brazil, consistent with its role as the most digitally intensive sector.
- All sectors saw an increase in AI job share in 2025 compared to 2024, pointing to broad-based growth in AI hiring.

# In Brazil, job postings have grown faster in less AI-exposed occupations since 2021, despite a decline in the most recent year

Number of job postings relative to 2021 by AI exposure quartile, Brazil, 2021-2025



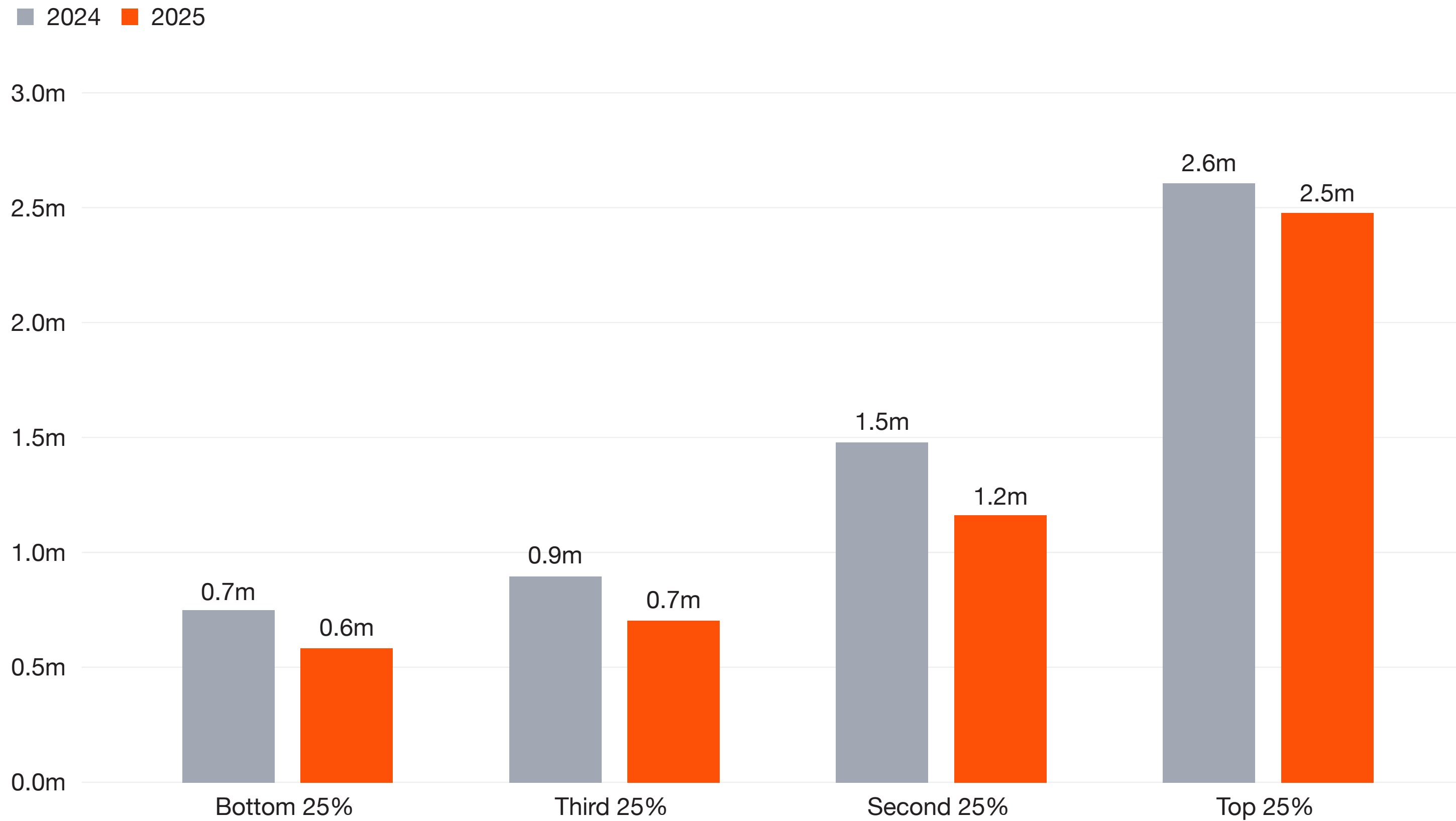
Source: PwC analysis, Lightcast data

## Findings

- Job postings increased across all AI exposure groups from the 2021 baseline, though most quartiles declined in 2025, with the exception of the highest exposure quartile.
- By 2025, both the lowest and highest exposure quartiles have around 2.7 postings for every posting in 2021.

# The top quartile of AI exposed occupations still accounts for the largest number of job postings in Brazil

Total number of job postings by AI exposure quartile, Brazil, 2024 and 2025



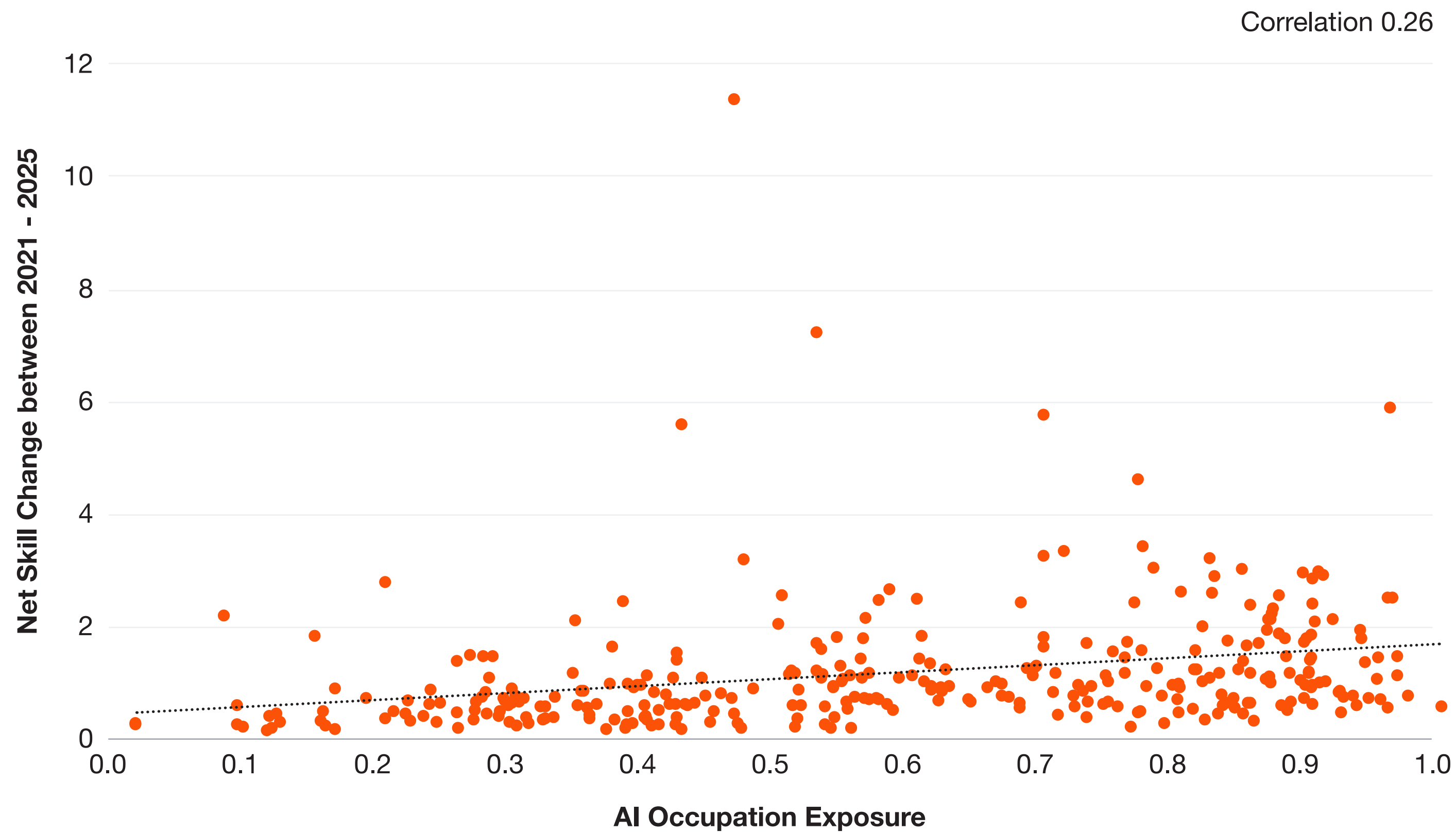
Source: PwC analysis, Lightcast data

## Findings

- While job postings have grown faster in less AI-exposed occupations over the long term, higher exposure quartiles still account for more postings in absolute terms.
- In 2025, the most AI-exposed quartile recorded around 2.5 million job postings, four times higher than the least exposed group.
- All quartiles saw a decline in job postings between 2024 and 2025, indicating a broad-based contraction in hiring.

# In Brazil, more AI-exposed occupations tend to experience faster rates of skills transformation

Net skill change from 2021 to 2025 for 4-digit ISCO code occupations by AI occupation exposure, Brazil



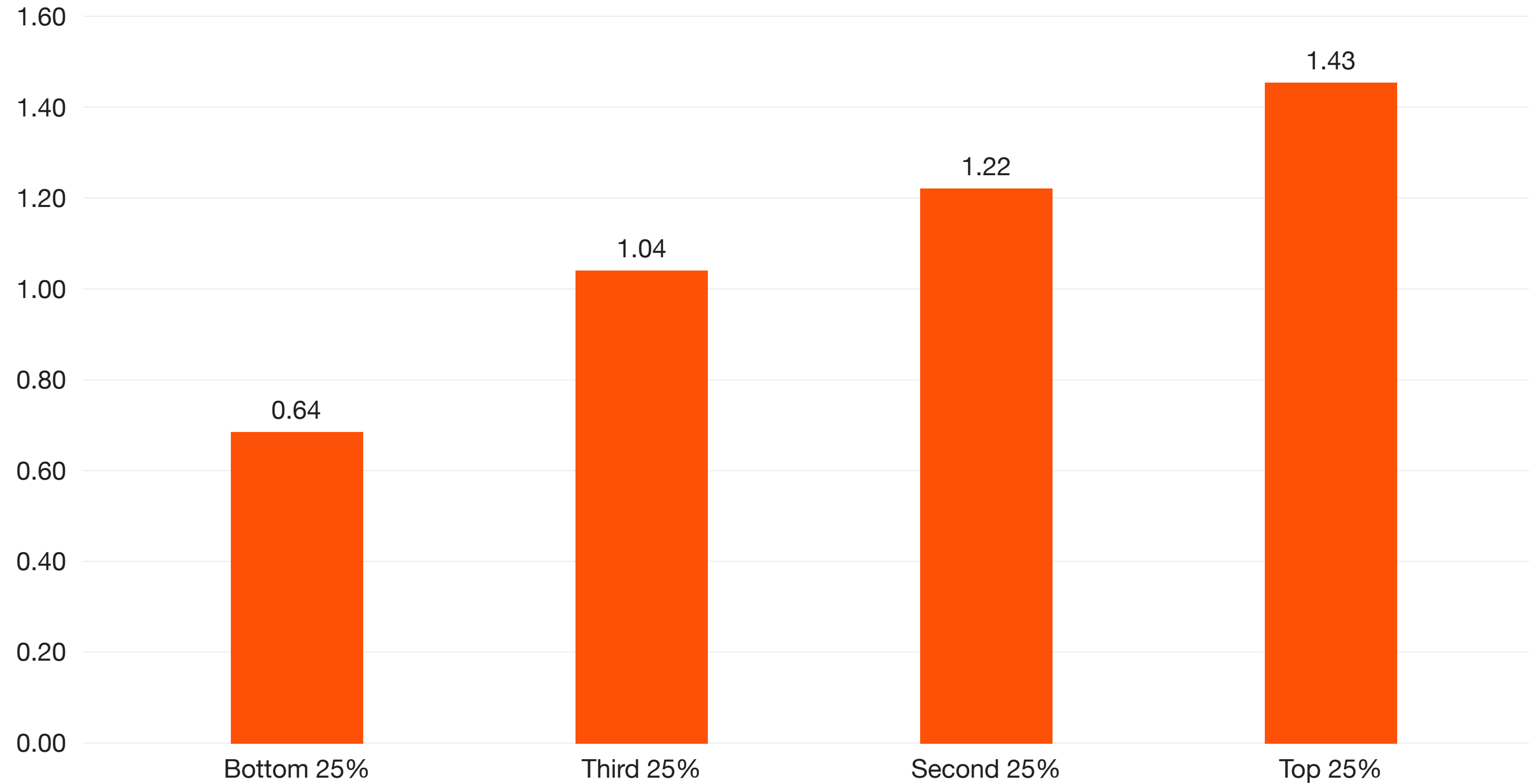
Source: PwC analysis, Lightcast data

## Findings

- There is a positive correlation of 0.26 between AI exposure and net skills change between 2021 and 2025, indicating that more exposed occupations tend to see greater shifts in skill requirements.
- This suggests that AI-exposed roles in Brazil tend to adapt more rapidly, with evolving task demands reshaping the capabilities required.

# This can be seen across exposure quartiles, where the most AI-exposed occupations show the largest skill shifts

**Average net skill change from 2021 to 2025 for 4-digit ISCO code occupations by AI occupation exposure quartile, Brazil**



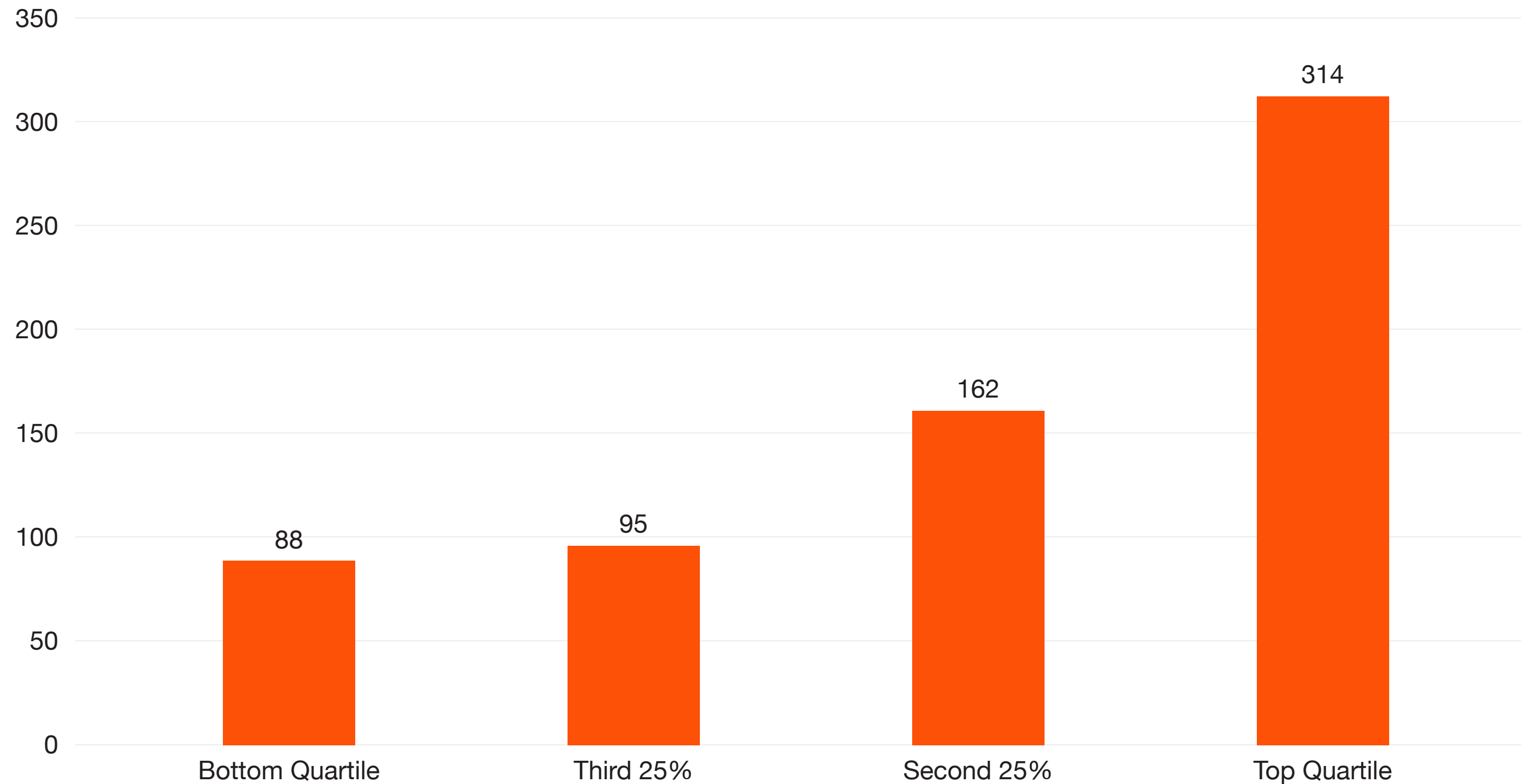
Source: PwC analysis, Lightcast data

## Findings

- Occupations in the highest AI exposure group show the fastest skills transformation between 2021 and 2025.
- Average net skill change increases across the quartiles, with each successive exposure group recording a higher level of skills transformation and the top quartile standing clearly above the rest.
- This reinforces the earlier finding of a positive relationship between AI exposure and skills change in Brazil, where more exposed occupations tend to evolve faster as task requirements shift.

# In line with this, the most AI-exposed occupations see greater expansion in the average number of new skills per occupation

**Average number of “new” skills per occupation, by AI exposure quartile, Brazil, 2025 relative to 2021**



Source: PwC analysis, PwC AI Occupational Exposure Index, Lightcast data

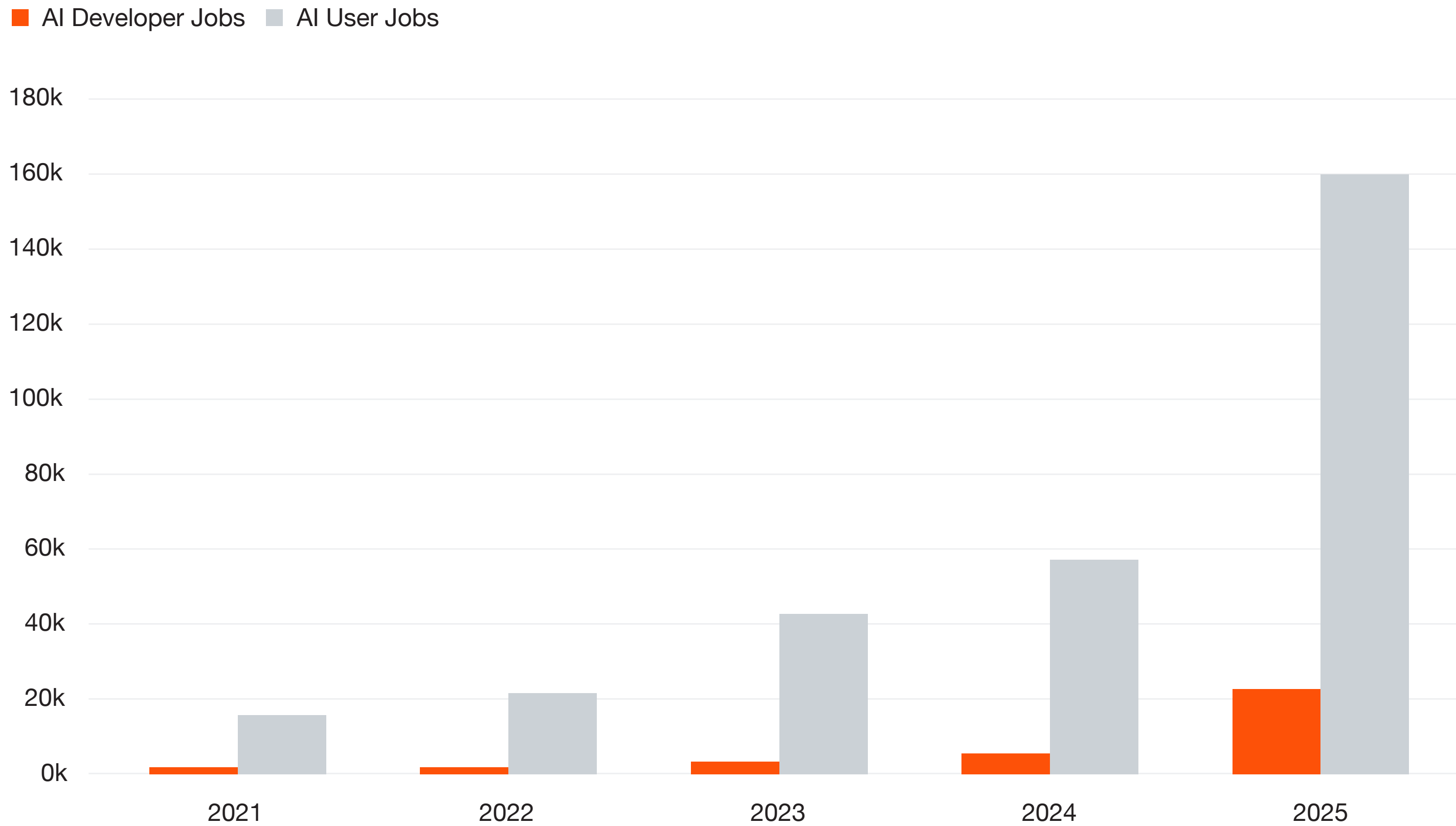
Notes: We define a ‘new skill’ as any skill that has greater than 10 mentions in an occupation in 2025, but five or less mentions in that same occupation in 2021. Across all postings for an occupation in a given country, we count the number of ‘new skills’ required for that occupation.

## Findings

- We find a clear positive relationship between AI exposure and the number of new skills required within occupations. Specifically, occupations in higher AI exposure quartiles exhibit a greater average number of newly emerging skills between 2019 and 2025.
- Importantly, this metric reflects the average number of new skills per occupation within each exposure quartile, rather than the total number of new skills observed.
- While the bottom and third quartiles show relatively modest differences, there is a more pronounced increase at higher exposure levels, with the top quartile averaging 314 new skills per occupation. This suggests that skill expansion accelerates as AI exposure increases.
- While some of this increase reflects higher posting volumes in more exposed occupations, this is consistent with underlying job growth and evolution, as expanding roles require a broader and more diverse set of skills.

# AI job demand in Brazil is dominated by user roles, with strong growth across both user and developer roles

## Total number of AI user and AI developer job roles, Brazil, 2021-2025



Source: PwC analysis, Lightcast data

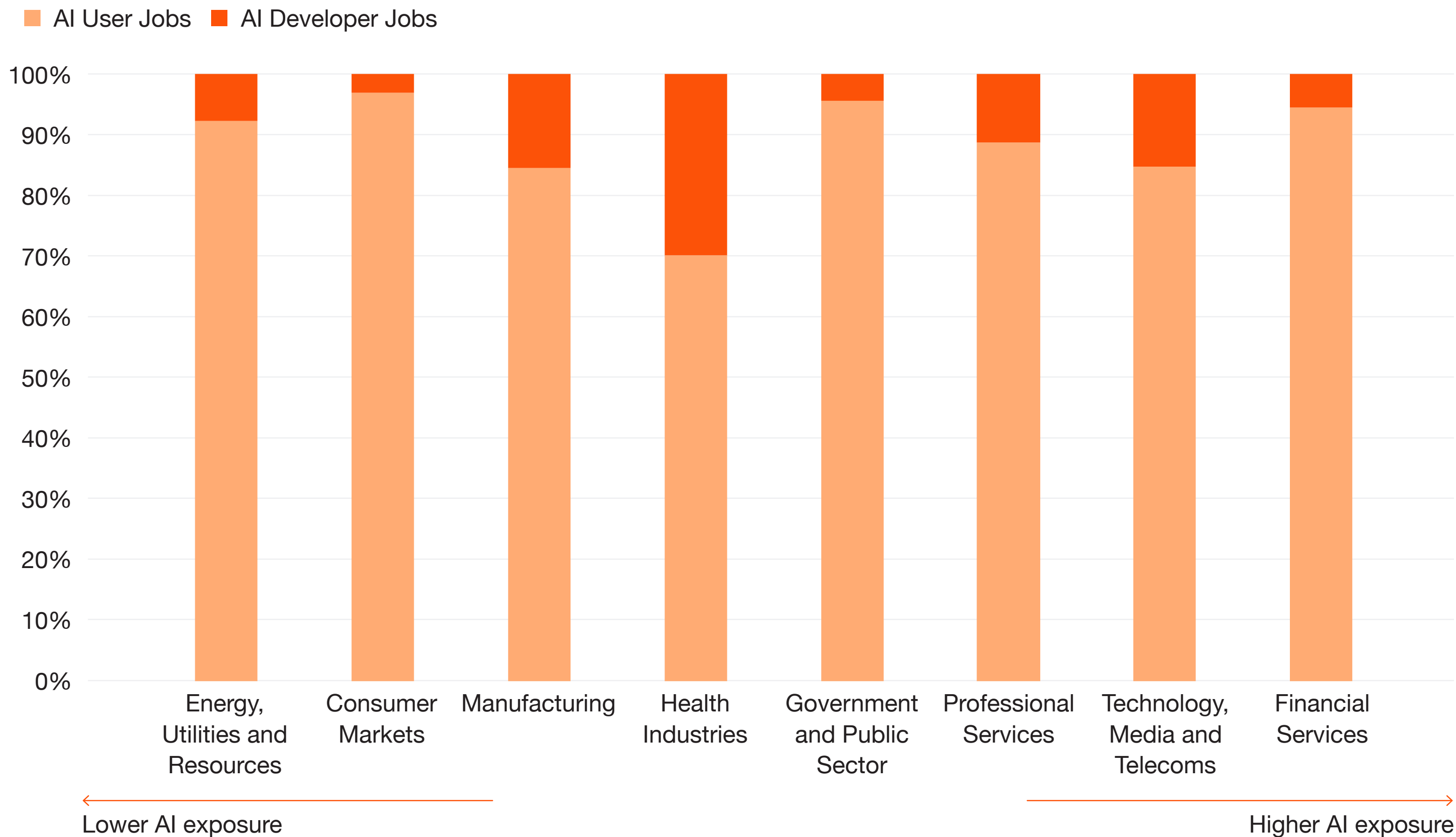
Notes: AI user and AI developer job roles are determined as jobs requiring Tier 0 or 1 skills (AI literacy and applied AI skills) for AI user jobs and Tier 2 skills (advanced AI skills) for AI developer jobs. AI developer jobs are tagged as such if there are any skills in the job postings data requiring Tier 2 skills for a specific job role.

### Findings

- AI user roles account for the majority of AI-related jobs and continue to drive overall demand, increasing by **~102k** roles in 2025, despite a dip in 2022.
- In contrast, AI developer roles remain lower but stable, growing by around **16.7k** in 2025.
- Growth has accelerated across both categories in the last year, indicating an increased expansion in both adoption and development of AI capabilities.

# Across sectors, AI job postings in Brazil remain concentrated in capabilities related to the use of AI rather than its development

Within sector shares of AI user and AI developer job roles of all AI related roles, Brazil, 2025



## Findings

- AI user roles account for the largest share across most sectors, indicating a strong focus on deploying and integrating AI into existing workflows.
- **Health Industries** shows the highest share of **AI developer** roles (**29.8%**), indicating greater focus in the development of sector specific advanced AI tools.
- **Consumer Markets** records the highest share of **AI user** roles (**97%**), reflecting broad-based adoption of AI across operational roles rather than in-house development.

Source: PwC analysis, Lightcast data

Notes: AI user and AI developer job roles are determined as jobs requiring Tier 0 or 1 skills (AI literacy and applied AI skills) for AI user jobs and Tier 2 skills (advanced AI skills) for AI developer jobs. AI developer jobs are tagged as such if there are any skills in the job postings data requiring Tier 2 skills for a specific job role.

# Contacts



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