



Argentina

Country dashboard

Agents, robots, and us

How AI reshapes work and skills in Latin America

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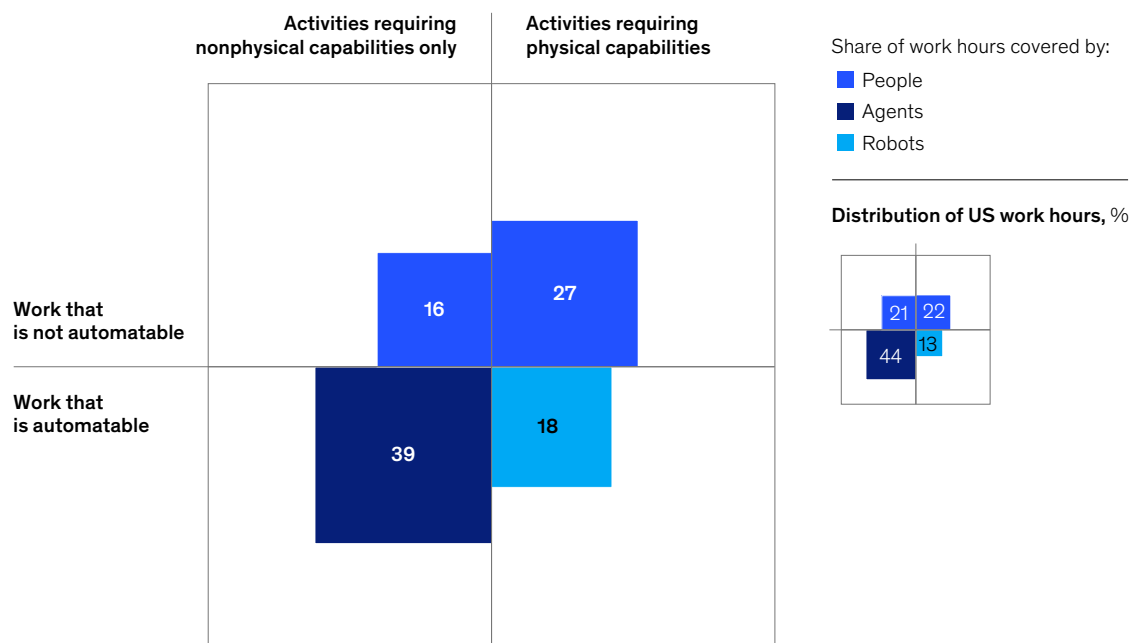


At a glance

- **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.

¹Automation 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. Examples range from agents that listen to thousands of customer service calls and help representatives identify sales opportunities in real time to 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.

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.

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

10.1×

People in jobs requiring AI fluency in 2025 vs 2023

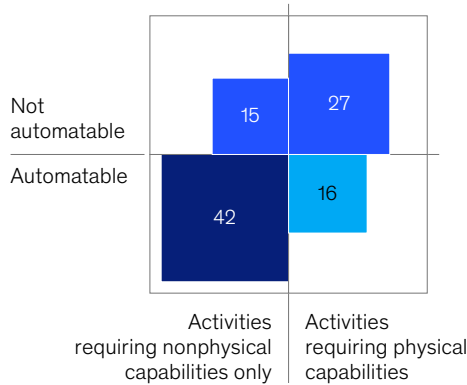
Automation could change how work gets done in Argentina.

Distribution of work hours, 2024

Share of work that could be done by:

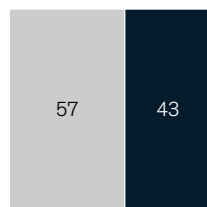
● People ● Agents ● Robots

Hours by technical automation potential,¹%



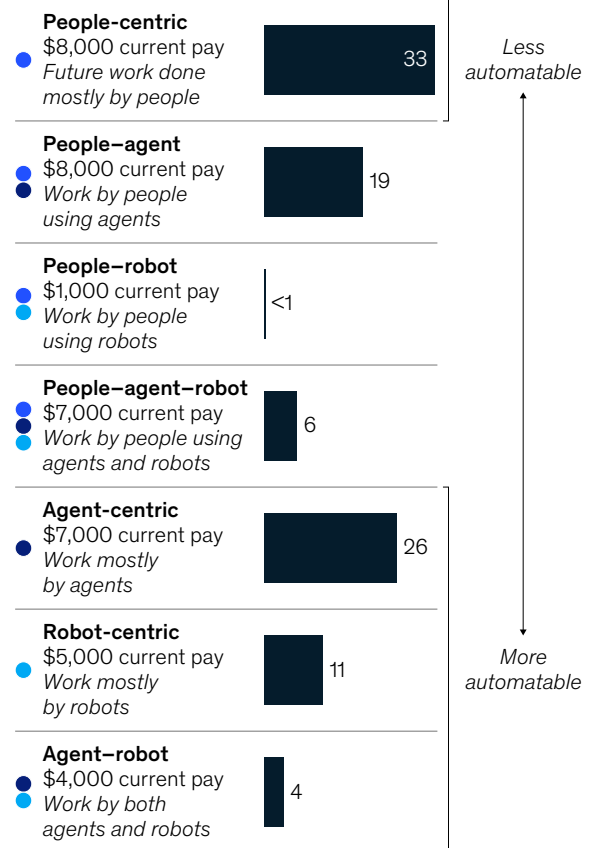
Hours by capabilities required, %

■ Nonphysical
■ Physical



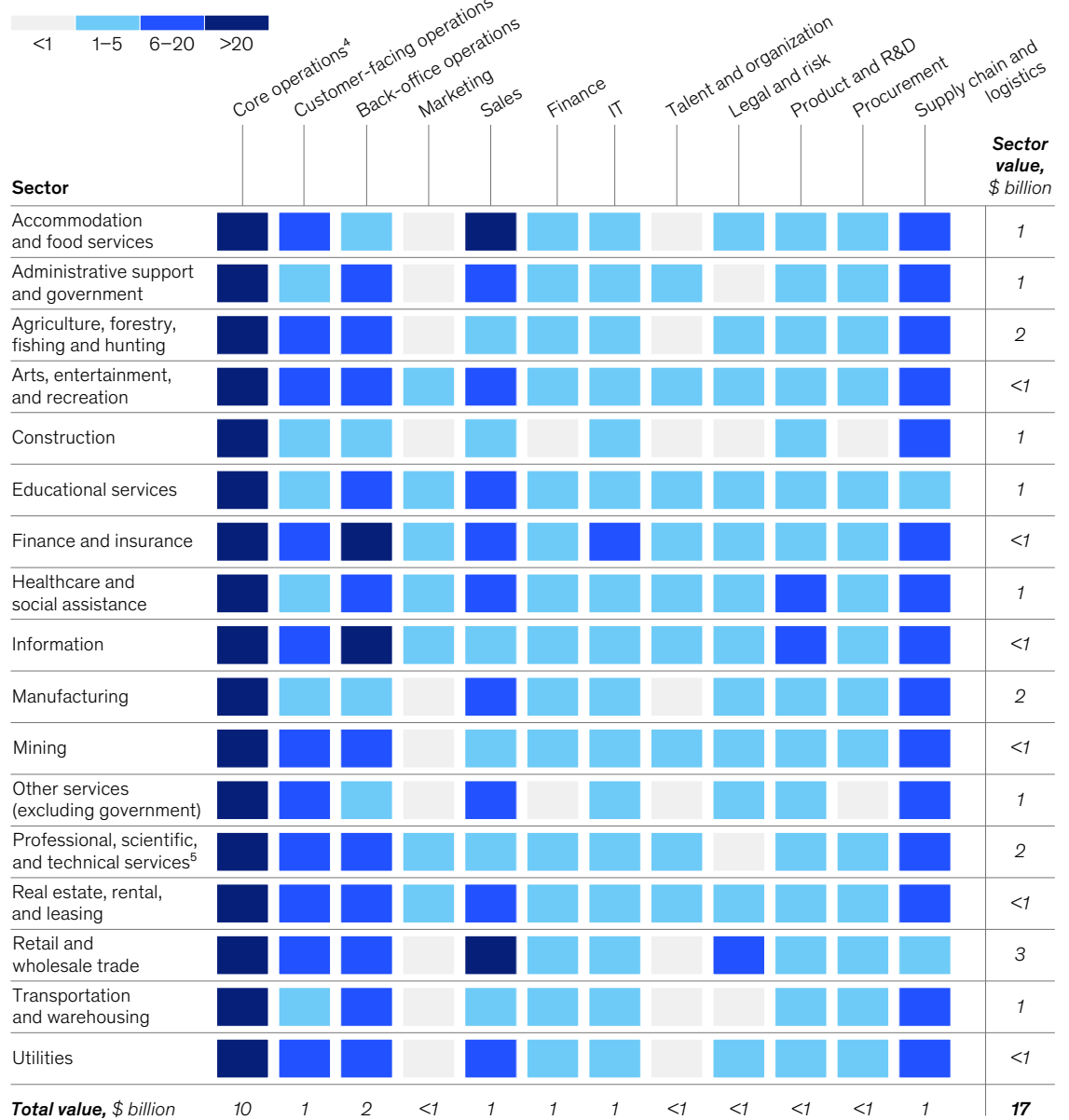
53% of workforce in more physical roles²

Distribution of workforce across occupation archetypes, 2024, %



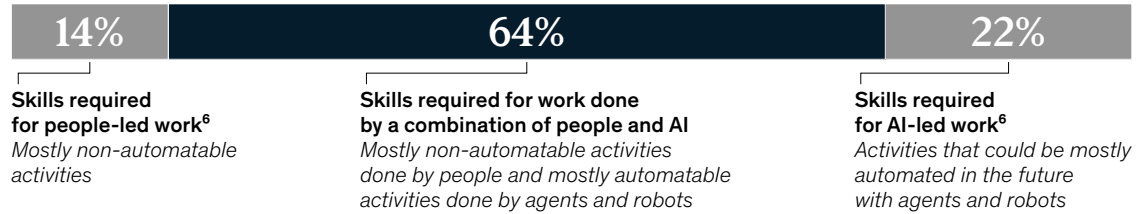
Economic value by sector and domain at 11% automation adoption, 2030 midpoint scenario³

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



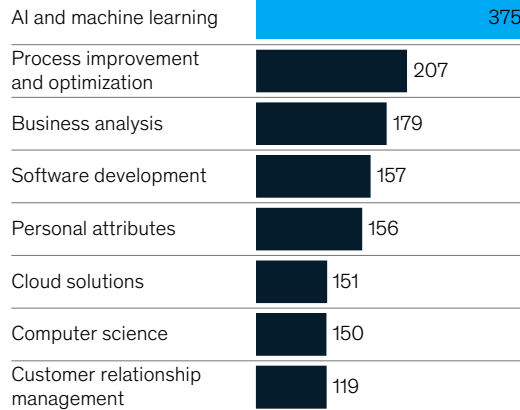
AI will reshape skills in Argentina's workforce.

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

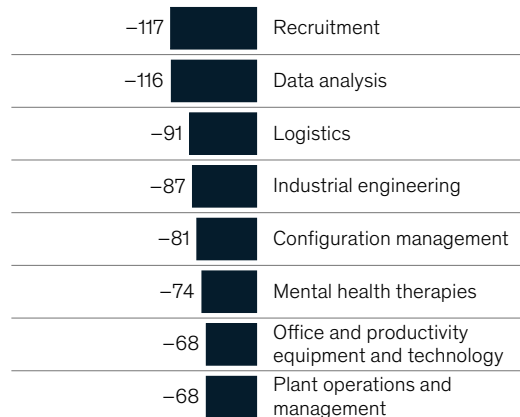


Change in occupations with postings mentioning each skill subcategory, 2023–25⁷

Greatest increases

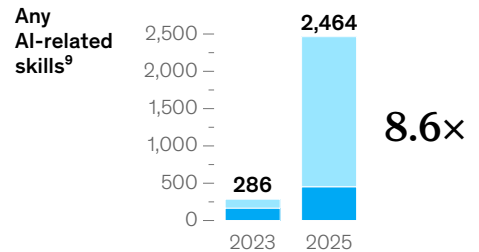
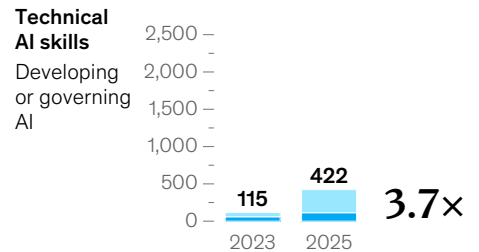
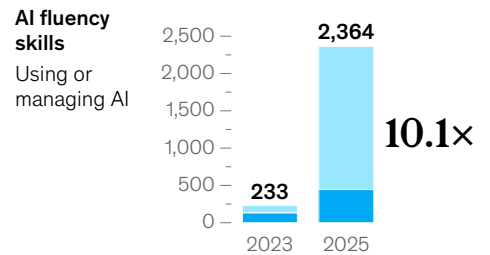


Greatest decreases



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

Occupation type: ■ STEM⁸ ■ Non-STEM



Employees in occupations with AI-related skills in at least 5% of postings¹⁰

Occupation type: ■ STEM ■ Non-STEM

Occupation group	Total FTE workers, thousand	Workers whose jobs require AI skills	
		Share, %	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

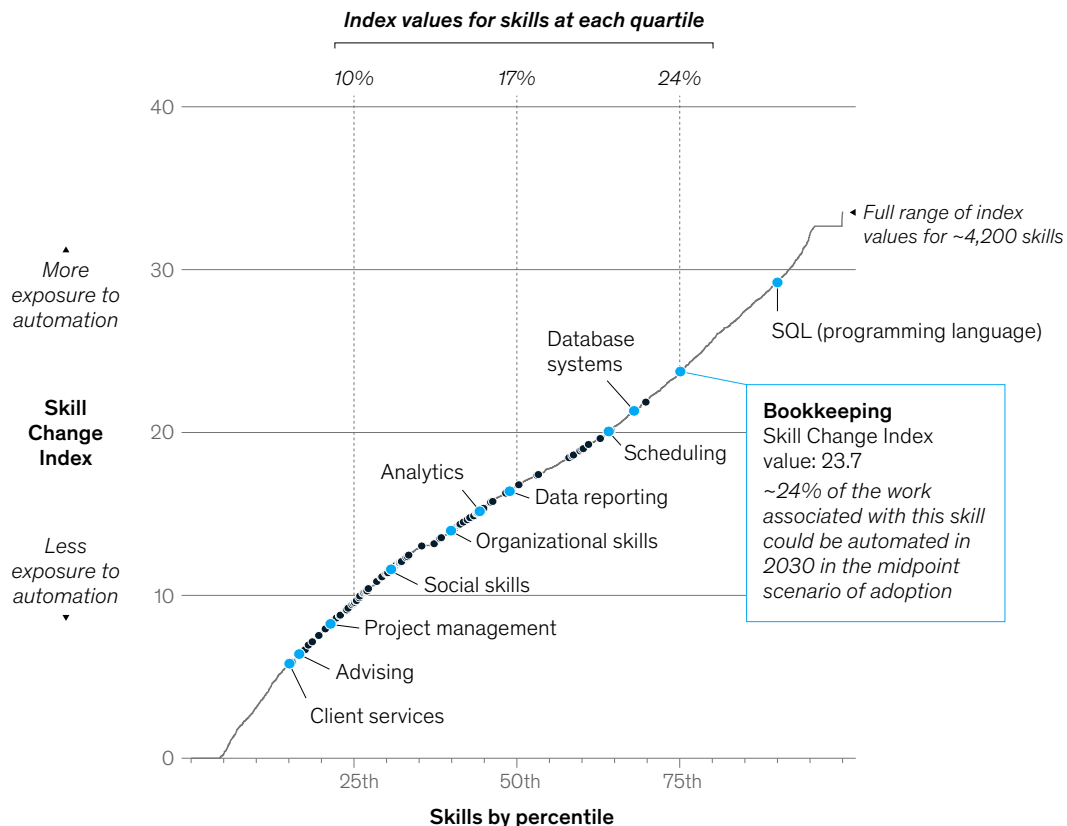
~81%
of demand
for AI skills
from 6
groups

~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. ¹Automation 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. ²Defined as occupations in which at least 40% of work hours require physical capabilities. ³Estimated by multiplying occupation-level automation adoption in the 2030 midpoint scenario by full-time equivalents and 2024 wages. ⁴Includes 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. ⁵Includes 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. ⁷At least 1 skill in the subcategory appears in ≥5% of job postings for a given occupation. ⁸STEM roles include computer and mathematical; architecture and engineering; life, physical, and social sciences; and healthcare occupations. ⁹Employees in jobs requiring AI-related skills may need AI fluency, technical AI skills, or both; totals may not sum. ¹⁰Includes only skills Lightcast categorizes as "artificial intelligence and machine learning" or "natural language processing." ¹¹Based 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

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