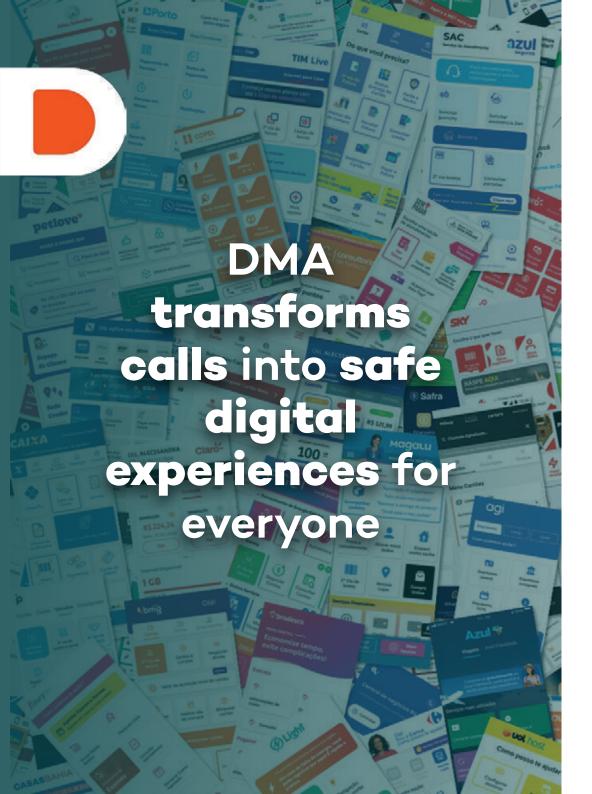
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BRAZILIAN
BOT ECOSYSTEM
MAP 2025





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Over 1 Million Bots

More than 1 million conversational robots have been developed by companies operating within this ecosystem in Brazil.

In 2017, when the first edition of this report was published, only 8,000 bots were mapped. Since then, the average annual growth rate has been 83%.

Currently, 150,000 conversational bots are active in the country. Together, they handle approximately 269 million sessions and 4.76 billion messages per month.

On average, each bot in operation conducts 1,800 sessions and exchanges 31,700 messages per month.

Over these nine years of monitoring, the technology behind chatbots and voice bots has evolved significantly — transforming the companies that operate in this ecosystem, the composition of their product portfolios,

and the behavior of consumers themselves.

In 2017, most bots operated using predefined conversation flows, built on decision trees — these were the first-generation bots.

Second-generation bots, characterized by the use of natural language processing (NLP) technology to identify intent in freeform user text, already existed at that time and grew steadily in the years that followed — until the advent of ChatGPT and the explosion of generative artificial intelligence.

Generative AI marked the beginning of the third generation of conversational robots, whose presence has grown rapidly since 2023.

More recently, a new concept has emerged — that of the AI Agent: a system endowed with a certain degree of predefined autonomy for decision-making and the execution of actions based on

AI-driven data analysis.

AI agents do not necessarily need to interact directly with humans via conversational interfaces — many operate in the backend, connecting with other systems.

Those AI agents
that do interact
with humans,
typically through
generative AI-powered
conversational interfaces,
can be classified as a new generation
of bots — possibly the fourth
generation, or, for the more cautious,
generation 3.5.

These AI agents are now included in this map for the first time. More data about them appear in later sections.





ABOUT THIS REPORT AND ITS AUTHOR

This research was prepared based on responses from **67 companies** that either develop conversational robots or provide tools for that purpose. The data were collected through an **online guestionnaire** between **June and September 2025**.

The analysis and writing of this report were carried out by **journalist Fernando Paiva**, editor of *Mobile Time* and organizer of the *Super Bots Experience* seminar. Paiva is a seasoned technology and economics journalist specializing in the mobile industry, with **25 years of experience**.



DISCLAIMER

The results of this survey may be shared in public or private presentations as long as due credit is given to the source: Panorama Mobile Time Survey - Brazilian Bot Ecosystem Map - October, 2025.

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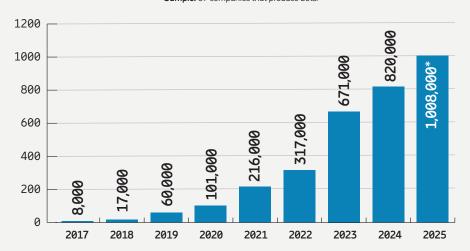


CHART 1

THE BRAZILIAN MARKET BY NUMBER OF BOTS PRODUCED (CUMULATIVE)

Survey Definition: For this and the following questions, the study uses the following definition of a bot: A conversational robot (chatbot) with text or voice-based interaction, regardless of the underlying technology or communication channel.
 Counted as bots in this study are: 1. Non-AI chatbots — those following predefined conversation scripts (text IVRs); 2. Chatbots using NLP (Natural Language
 Processing); 3. Chatbots powered by generative AI; 4. Voice bots — bots operating through voice channels, either synchronously or asynchronously; 5. AI agents — bots with a certain degree of decision-making autonomy. Based on this definition, companies were asked: "Considering all bots your company has helped develop in Brazil, how many are there to date?" (Note: Count each conversational bot available for direct human interaction as one bot, regardless of how many channels it operates on.
 Micro-agents that operate in the backend assisting other bots should not be included.)

Sample: 67 companies that produce bots.



*From 2025 onward, data include **AI agents**, provided they involve conversational interaction with humans.

CHART 2

CURRENT SCENARIO IN BRAZIL

Survey questions:

- "How many bots developed by your company, or built using your platform, are currently active in Brazil?"
- "Considering all bots created by your company or with your platform that are now active in Brazil, what is their average monthly volume of messages exchanged with humans?"
 - "And what is the average monthly number of conversation sessions with humans?"

Sample: 67 companies that produce bots.

150,000

Bots currently in operation

269

million (Monthly sessions)

4.76

billion (Monthly messages).

Average sessions per bot (per month): **1,800**; Average messages per bot (per month): **31,700**









The Rise of Generative AI and the Emergence of AI Agents

If anyone still doubted the impact generative AI would have on the conversational robot market, the numbers in this report should change their mind. This new conversational technology has radically transformed the chatbot and voicebot landscape, as the survey data clearly shows.

In 2023, the first year generative AI was included in this map, 72% of bot developers in Brazil had decided to incorporate the technology, and 60% had already experimented with creating bots using it. The number of operational bots powered by generative AI in the country was still small in 2023, but it surged the following year: on average, 36% of the bots deployed by survey respondents used generative AI. That figure has now risen to 44%.

Another important indicator is developers' perception of client demand for bots with generative AI.
On a scale of 1 to 5, where 1 means "very low" and 5 means "very high," 49% of respondents selected 4 or 5 in 2023. That percentage rose to 64% in 2024—and now reaches 80%. In short: in the ocean of conversational interface

solutions, generative AI is a strong current against which it's not worth swimming.

However, this does not mean the death of earlier technologies. What we increasingly see are projects that combine the three main types of conversational interfaces: decision tree (also known as text IVR); natural language processing (NLP); and generative AI. Depending on the stage of the customer journey, the channel used, and/or the user's intent, one technique may be more appropriate than another—both in terms of cost and efficiency. Indeed, depending on the use case, a decision tree—based solution can be more efficient and far cheaper than consuming tokens through generative AI. The trend is to combine all three technologies within the same bot and use an orchestrator to identify, in real time, which approach best fits the conversation as it unfolds.

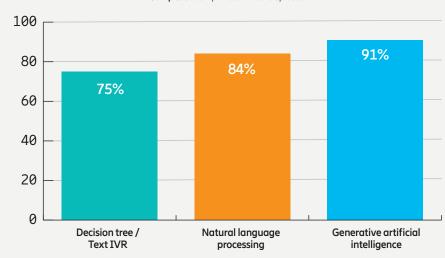
The adoption of hybrid bots becomes clear when developers are asked which of these technologies they currently use. The percentages are high across all three, showing that most combine them: 75% use decision trees; 84% use NLP; and 91% use generative AI. In the previous year, the rates were 80%, 75%, and 88%, respectively. Thus, there was a slight decline in the use of

CHART 3

CONVERSATIONAL TECHNOLOGIES

Question: Conversational robots can be divided into three groups according to the technology behind their conversational capability:

- **1. Decision tree / Text IVR**: The bot guides the conversation by offering options as buttons or menus.
- **2. Natural language processing (NLP)**: The bot is integrated with an AI engine capable of recognizing user intent in each text or voice input (examples: IBM Watson, Microsoft Luis, etc.). Based on the identified intent, it delivers predefined responses.
- **3. Generative artificial intelligence:** The bot is integrated with one or more LLMs (large language models) and can not only understand the user's input but also generate a new response for each request, instead of using prewritten replies.





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decision trees and growth in NLP and generative AI, but all three techniques remain widely used.

Just over half (51%) of the companies that work with NLP use their own engine—typically built by coupling together pieces of various engines. Among off-the-shelf options, Google's DialogFlow and IBM's Watson are the most popular in Brazil.

In the field of generative AI, OpenAI is by far the most widely used LLM provider, cited by 69% of developers, followed by Google, preferred by 10% of the ecosystem. It's worth noting that it's common for bots to be built using multiple LLMs, orchestrated based on factors such as cost, accuracy, and latency.

The year 2025 marks the arrival of the "AI agent" concept. Technically, the most accepted definition describes bots with pre-configured autonomy for decision-making. In practice, however, some market offerings use the term "AI agent" as a synonym for a virtual assistant or AI-powered chatbot, without meeting the criterion of autonomous action—something that ends up confusing the public and complicating classification.

CHART 4

AVERAGE PROPORTION OF BOTS USING GENERATIVE AI PER DEVELOPER

Question: Of all active bots created by your company, approximately how many use generative AI?

Sample: 61 companies that develop bots and work with generative AI

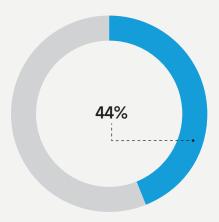
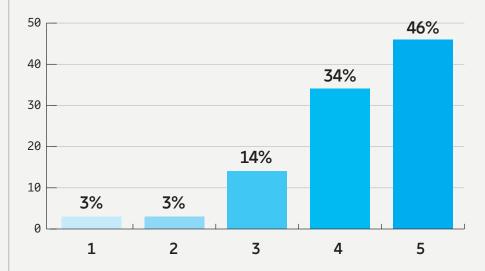


CHART 5

EXPECTED DEMAND FOR BOTS WITH GENERATIVE AI

Question: In your opinion, on a scale from 1 ("very low") to 5 ("very high"), how strong is your company's demand for bots with generative AI in Brazil this year?



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In this survey, we sought to clearly differentiate bots according to the characteristics that define each generation. Regarding AI agents, respondents were asked the following:

"Considering the definition that an AI agent is a bot equipped with artificial intelligence for data analysis and programmed to have autonomy in making certain decisions, how many AI agents developed with your company's participation are currently operating in Brazil with direct human interaction?"

Of the 67 participating companies, 58 reported that they already work with AI agents. Altogether, they have developed 6,600 AI agents currently in operation.

CHART 6

MAIN NLP ENGINE PROVIDERS

Question: Who is your NLP engine provider?

Sample: 57 companies that develop bots using NLP

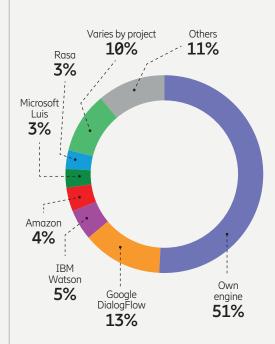


CHART 7 MAIN LLM PROVIDERS

Question: Which LLM provider do you use most in your bots?

Sample: 61 companies that develop bots using generative AI

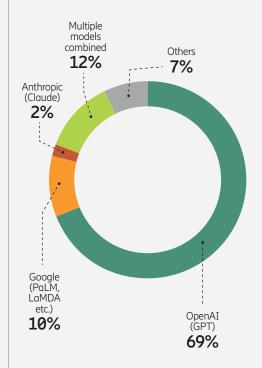


CHART 8 AI AGENTS

Question: Considering the definition that an AI agent is a bot equipped with artificial intelligence for data analysis and programmed to have autonomy in making certain decisions, how many AI agents developed with your company's participation are currently operating in Brazil with direct human interaction?









Text, Synchronous and Asynchronous Voice, Biometrics, and Sentiment Analysis

Text remains the most widely used conversational interface. 99% of developers work on building bots that communicate through text.

However, voice is gaining momentum. In this edition, for the first time, the voice interface was divided into two types: asynchronous voice, used in audio messages—especially on WhatsApp—and synchronous voice, meaning real-time voice conversations with a bot, which can take place over a phone call or a WhatsApp call, for example. It's worth noting that this year, the messaging app introduced the voice calling feature for businesses.

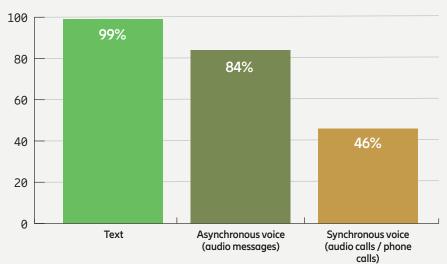
84% of developers build bots capable of communicating via audio messages (asynchronous voice), and 46% work with synchronous voice. The latter requires a more complex technological structure, with fast processing and low latency to make the conversation sound natural.

Sentiment analysis, in turn, is a widely used technology in bot projects, particularly those focused on post-sales customer service. It can be applied to both text and voice bots—including in real time, during a conversation—to trigger a human agent when a customer threatens to cancel a subscription or take legal action against the company. 69% of developers currently use sentiment analysis technology in their bots, up from 63% in 2024.

Digital biometrics, especially facial recognition, is used to authenticate the user in conversations that require identity verification to authorize certain actions. This type of solution is often implemented within messaging channels, particularly in financial service bots. 42% of developers report working with digital biometrics in their bots, compared to 39% in 2024.

CHART 9 BOT INTERFACES

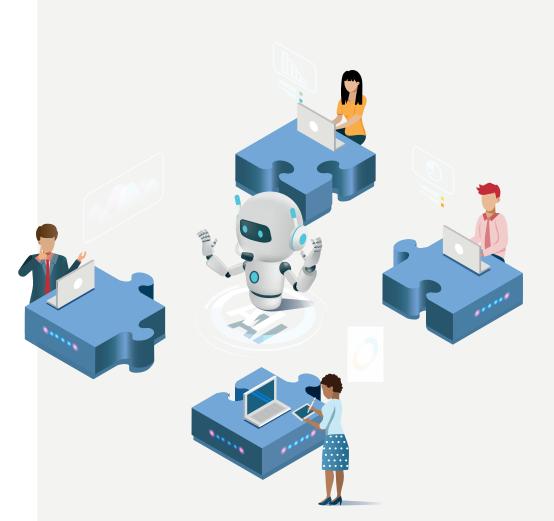
Question: What types of conversational interfaces does your company work with in its bot projects?











COMPANIES PERFORMING SENTIMENT ANALYSIS ON BOT CONVERSATIONS

Question: Does your company perform sentiment analysis on messages received by its bots?

Sample: 67 companies that develop bots

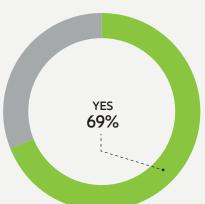
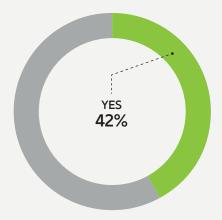


CHART 11

COMPANIES USING DIGITAL BIOMETRICS IN BOTS

Question: Does your company develop bots with facial or voice biometrics to authenticate users?



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Financial Sector, Customer Service, and WhatsApp: The Champions of Bot Projects in 2025

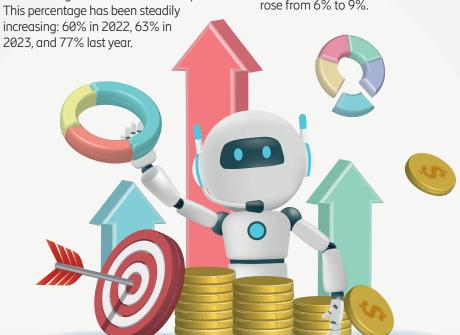
After two consecutive years of retail dominance, the financial sector has regained the top spot as the vertical with the highest demand for bots in 2025, cited by 24% of developers participating in this survey. Retail fell to second place, mentioned by 16%, followed by healthcare (12%) and industry (10%). A notable highlight is the rise of education, which increased from 3% to 8% as the main demand driver this year.

Customer service remains the primary purpose of bots created in Brazil, though it has been gradually losing ground year after year. In 2022, it was cited as the main purpose by 66% of developers, dropping to 64% in 2023, 59% in 2024, and now 58% in 2025.

Sales rank as the second most common purpose, following the opposite trajectory—growing with each edition of the study. It was identified as the main purpose by 9% of developers in 2022, 11% in 2023, 13% in 2024, and now 19%.

When it comes to channels, there is no change at the top: WhatsApp continues to lead by a wide margin. 79% of developers report that this messaging app is where they have the largest number of bots in operation. This percentage has been steadily.

On the other hand, websites have seen a sharp decline, while voice bots for telephony are gaining ground. Last year, 13% of developers said websites were their main channel, compared to only 3% now. Meanwhile, the share of developers citing telephone-based bots as their main channel rose from 6% to 9%.



When asked which channels they have ever developed bots for, developers showed growth in projects for Instagram and telephone, while websites and Facebook Messenger declined compared to last year.

Expectations for RCS bots have improved slightly. The share of developers who rated demand as 4 or 5 on a 1–5 scale rose from 8% to 13%. However, the proportion who rated demand as low or very low (1 or 2) remains much higher, at 78%.

In contrast, expectations for Instagram bots worsened. Whereas last year 30% rated demand as 4 or 5, that share dropped to 14%. Those who rated it as 1 or 2 rose from 47% to 67%.







VERTICAL WITH HIGHEST DEMAND FOR BOTS IN 2025

Question: For which vertical has your company developed the most bots so far this year in Brazil?

Sample: 67 companies that develop bots

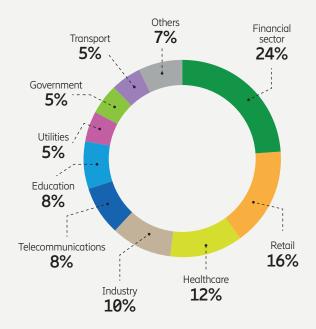


CHART 13

MAIN PURPOSE OF BOT PROJECTS IN 2025

Question: For which purpose has your company developed the most bot projects so far this year in Brazil?

Sample: 67 companies that develop bots

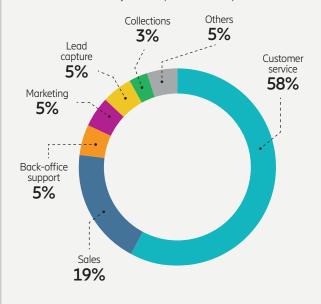
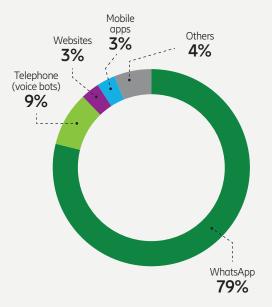


CHART 14

MAIN CHANNEL WHERE COMPANIES HAVE THE MOST BOTS TODAY

Question: Among the channels below, which one currently has the largest number of bots created by your company?









CHANNELS FOR WHICH COMPANIES HAVE ALREADY DEVELOPED BOTS Question: Indicate the channels for which your company has already developed bots Sample: 67 companies that develop bots 100 %69 80 %99 52% 60 42% 36% 40 25% 18% 20 %6 %6 5% 3% Massapo Focebooknesserges Tolonone (voice bots) Telegram Microsoft Teoms
Abole Business Chot Others







EXPECTED DEMAND FOR RCS BOTS

Question: In your opinion, on a scale of 1 ("very low") to 5 ("very high"), how strong is your company's demand for RCS bots in Brazil this year?

Sample: 67 companies that develop bots

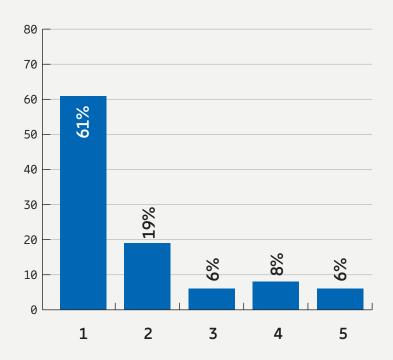
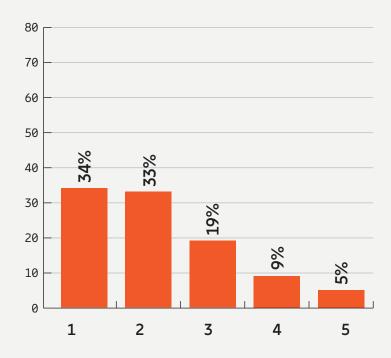


CHART 17

EXPECTED DEMAND FOR INSTAGRAM BOTS

Question: In your opinion, on a scale of 1 ("very low") to 5 ("very high"), how strong is your company's demand for Instagram bots in Brazil this year?









Role in the Ecosystem, Business Model, Geographic Distribution, and Size of Developers

In the conversational-robot ecosystem, companies can play multiple roles — from consulting to offering self-service platforms for bot creation, as well as providing various complementary technologies. There are also companies whose core business is not specifically bot development, but for which bots represent an additional feature that adds value to their service portfolio — such as contact centers, CPaaS providers, or CRM platforms.

In this report, 70% of respondents state that they develop custom bots; 64% offer a bot-building platform; and 62% act as consultants for conversational-robot projects. As shown, the same company may operate in several capacities simultaneously.

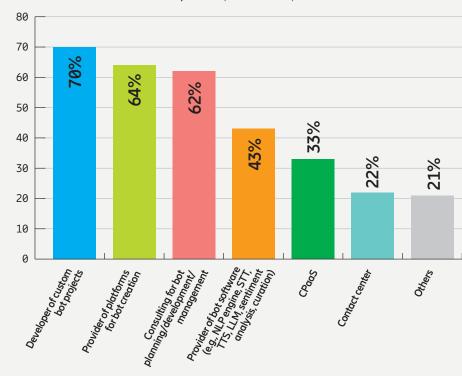
This flexibility also extends to business models. The most common model is charging per conversation, adopted by 61% of respondents. Next come charging per message (39%), per user (39%), per usage license (37%), and per project (30%).

The market is characterized by a large number of small and mediumsized companies: 67% have up to 100 employees. 23% have between 101 and 1,000 employees, and 10% employ more than 1,000.

São Paulo concentrates more than half of the players active in Brazil, accounting for 35 of the 67 respondents in this survey. Minas Gerais also stands out, with 11 companies.

CHART 18 ROLES IN THE BOT ECOSYSTEM

Question: Mark the area(s) in which your company operates within the bot market









BUSINESS MODELS

Question: What is your company's business model for bot development?

Sample: 67 companies that develop bots

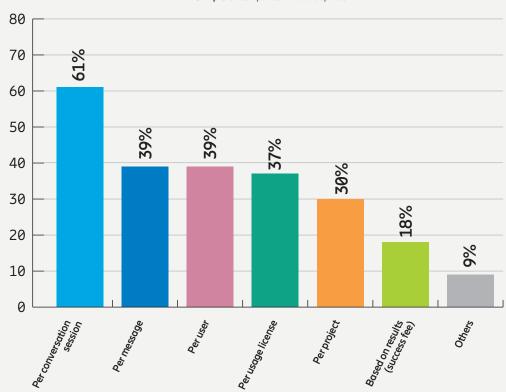
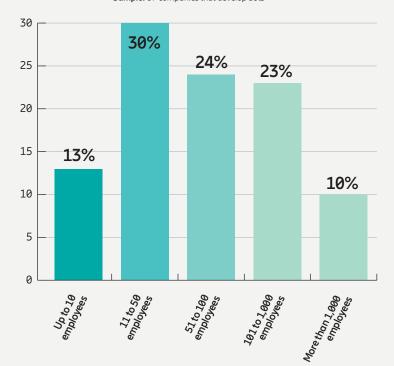


CHART 20

SIZE OF DEVELOPERS

(BY NUMBER OF EMPLOYEES)

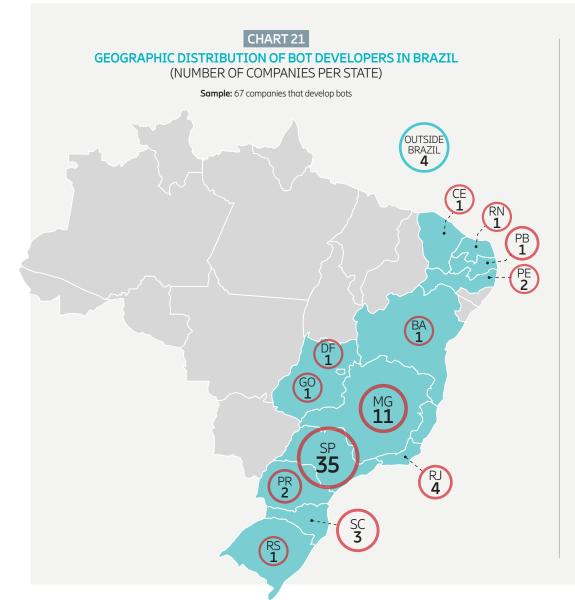
Question: How many direct employees does your company have in Brazil?











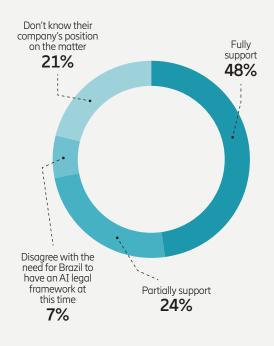
The AI Legal Framework

The Brazilian Congress has been debating the creation of an Artificial Intelligence Legal Framework, a law that will have a direct impact on the bot market. The bill, already approved by the Senate, is now under consideration in the House of Representatives and is among this year's legislative priorities.

Nearly half of the companies that develop bots and participated in this survey fully support Brazil's initiative to regulate AI (48%). About a quarter (24%) said they partially support the bill. A small minority—just 7%—disagree with the need for Brazil to have an AI legal framework at this time. The remaining 21% were unsure of their company's position on the matter.

CHART 22 DEVELOPERS' ASSESSMENT OF THE AI LEGAL FRAMEWORK

Question: Regarding the possibility of Brazil enacting a general law establishing rules for the use and development of artificial intelligence, your company...







Conclusions

The Brazilian conversationalrobot market is currently experiencing four simultaneous trends:

1. Irreversible adoption of generative AI.

Two years ago, there was still some caution due to LLM "hallucinations." Today, it is difficult to find a bot developer not working with generative AI. The maturation of techniques such as guardrails, and the rise of smallerscale models (SLMs) or domainspecific models (DSLMs), have brought greater reliability to bot responses. This is further reinforced by combining generative AI with other conversational interface methods, such as decision trees and NLP engines. The main obstacle at the moment remains token cost. Although prices have been falling, some foresee a future increase once the market consolidates around its major players.

2. Transition to chat commerce.

More and more companies are experimenting with bots for sales. Chat commerce is gaining traction, especially when combined with generative AI, enabling bots to identify the best product combinations within vast catalogs and craft persuasive sales arguments. Early experiments are also underway

with AI agents as sales representatives, authorized to negotiate discounts and close deals. The trend suggests that within a few years, demand for sales bots will surpass that for customer service bots.

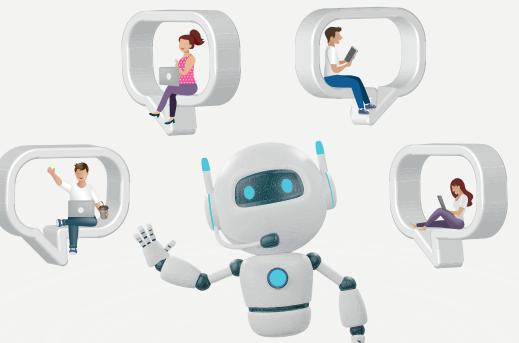
3. From text to voice.

Text remains the dominant medium in the conversational bot market, without

question. But voice is no longer just a supporting role. Advances in speech-to-text (STT), text-to-speech (TTS), and voice synthesis—combined with generative AI LLMs running on powerful data centers—are making it possible for bots to converse naturally and synchronously with humans, whether through voice or video calls. It may take a few more years for large-scale use cases to emerge in Brazil, such as fully automated call centers, but the technology is clearly moving in that direction.



Bots with autonomous decision-making capabilities—known as AI agents—are beginning to appear in both customer service and sales, using either text or voice. However, there is still some caution in adoption and lingering confusion in the market about the precise definition of the term.



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BOT DEVELOPERS GUIDE IN BRAZIL

This guide consists of companies that are part of the Brazilian bot ecosystem, covering those that develop bots for third parties, provide solutions for bot development, or are directly or indirectly associated with this ecosystem.

ASC Brazil - Associated Software Company

https://www.ascbrazil.com.br/

Barkus

barkus com br

Bemobi

bemobi.com

Blip

blip.ai

Botmaker

https://botmaker.com/

Buszap

www.buszap.com

Caixa Econômica Federal

www.caixa.gov.br



ColmeIA www.colmeia.cx

cVortex

www.cvortex.com

Cxpress

https://home.cxpress.io/

De Pieri Comunicação

www.depiericomunicacao.com.br

Digitro

digitro.com



Droz

https://droz.ai

Duotalk

www.duotalk.com.br

Escale

escale.com.br

Fortics Tecnologia

https://www.fortics.com.br

Futurotec/Escallo

escallo com br

GBPA Tecnologia da Informação LTDA

www.gbpa.com.br



2025

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GlobalBot

https://globalbot.com.br

grupogbi

grupogbi.com

Gupshup

www.aupshup.io

Haaifv

haaifv.com

helenaCRM

www.helena.app

Heptpágono Consultoria

www.heptagono.com.br

Hi Platform

www.hiplatform.com

Ikatec - Produto Digisac

www.digisac.com.br

InBot

https://inbot.com.br/

Infobip

infobip.com

Interactive Media

www.imnet.com

IT Lean

https://www.itlean.com.br/

Jazztech

www.jazztech.com.br

Loja Integrada

https://lojaintegrada.com.br/home

Mais mobi

https://www.mais.mobi/

Matrix Go

www.matrixao.ai

Maxbot

www.maxbot.com.br

Meets

meets.com.br

Miguel Isonio Filho

https://neoron.io/

mindwAI

https://mindwai.com/

nativeMsg

https://nativemsq.com

Neotalk

www.neotalk.com.br

New Way Soluções Digitais LTDA

www.gruponewway.com.br

NTT Data

https://www.syntphony.com/conversational-ai-agents.html



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