

AI drives race for billion-dollar infrastructure

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[/EINPresswire.com/](https://www.einpresswire.com/) -- A robust physical foundation is required to train Artificial Intelligence systems, which could boost productivity by up to 2.3% per year in Latin America by addressing one of the region's biggest economic bottlenecks, says José Maurício Caldeira

As Artificial Intelligence increasingly becomes part of the professional and personal routines of companies and individuals, tech giants are engaged in an intense race to come out on top. This year alone, Meta, Alphabet, Microsoft, and Amazon are expected to invest more than \$600 billion in AI infrastructure—the physical and technological backbone needed to train generative AI models.



José Maurício Caldeira, partner and member of the Board of Directors of Colpar Brasil

This includes high-performance chips, massive data centers, networks and data storage, as well as advanced cooling systems, since AI chips generate significant heat. “Investments are massive because no one wants to be left behind,” says José Maurício Caldeira, partner and board member at Colpar Brasil, a holding company operating in sectors such as agribusiness, industry, and urban development. “No one wants to risk falling behind in the leadership of this trillion-dollar market and miss the opportunity of a lifetime,” he adds.

The geopolitical dimension is also evident in the race for AI leadership. The United States and China—which shook the generative AI market, previously dominated by Americans, with the launch of DeepSeek—are competing for technological leadership. Both are seeking to strengthen their capabilities in strategic areas such as advanced chips, cloud computing, and algorithm research. For many analysts, AI is likely to become one of the main drivers of economic competitiveness and global influence in the coming decades.

Big Tech's major bet is that the productivity gains enabled by Artificial Intelligence will offset these massive investments. However, the market fears the possibility of an AI bubble that could burst soon, similar to the dot-com bubble of the early 2000s and other innovations throughout

history.

So far, the outlook appears positive. Moody's, a risk rating agency that compiles data and information from companies and organizations across various sectors, estimates that AI could deliver average productivity gains of 1.5% per year over the next decade. This percentage will depend on factors such as workforce composition, demographics, technological maturity, unemployment levels, and labor costs, according to Moody's.

According to consulting firm McKinsey, Artificial Intelligence holds significant potential in Latin America. In a study presented at the latest World Economic Forum in Davos, Switzerland, the firm showed that advancing AI adoption in the region could increase productivity by between 1.9% and 2.3% per year through 2030, and generate between \$1.1 trillion and \$1.7 trillion in additional annual economic value locally.

"The low productivity of Latin America's economy, which has remained below the global average for years, has long been a barrier to strong and sustained growth in the region," says José Maurício Caldeira. "We are facing an opportunity that requires coordinated efforts and investments to deliver results."

According to McKinsey's research, there is still much work ahead. Currently, only a quarter of Latin American organizations are generating any economic value from AI use, and only 6% report significant value creation.

The consultancy suggests that to accelerate this transition, companies must rethink both core processes and business models—not just seek tools that deliver incremental productivity gains. Sectors such as agriculture, mining, energy, and tourism, where Latin America already excels, could yield the greatest results, turning into lasting competitive advantages.

"Due to its transformative power, AI has the potential to be one of the most significant technological advances in recent history, with impacts spanning multiple economic sectors," says José Maurício Caldeira. "We need an approach that includes physical and technological infrastructure, workforce upskilling, governance, and regional collaboration to fully leverage this moment of global transformation."

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