The Next Big Thing LatAm 2023

Julia De Luca and Lucas Abreu

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The Next Big Thing LatAm

What is the next big thing in 2023?

As such an intense year ends, questions about what to expect in the next year emerge. To address this issue and look forward, we joined forces to put together the most accurate predictions you will read in every sector when it comes to Latin America! OK – this might be a bold statement. But the truth is that we invited the most prominent thought leaders in every industry to give their takes on the next big thing in their respective sectors.

The outcome is a report full of great insights on opportunities that will help guide you through 2023. We are excited to have you as a reader in the first Next Big Thing LATAM report - which we believe is indeed the first of many. We hope you like it! The concept was inspired by the annual report "Next Big Thing", from Nikhil Basu. As always, we are open to feedback and suggestions and encourage you to share the information with all your peers!

The more we share knowledge on the Latin American tech industry, the more we foment our local entrepreneurs and investors. In the end, this is our ultimate objective: to continuously showcase our local talent and Thought Leaders on a worldwide scale!

Enjoy the ride!

Note that all sectors and thought leaders are listed in alphabetical order

Julia De Luca and Lucas Abreu



Agriculture

Antonio Moreira Salles, Co-Founder and General Partner Mandi Ventures

"The next big thing is that sustainability and traceability trends are expected to continue thriving in 2023, driven by increasingly environmentally conscious consumers and stricter international regulations.

Furthermore, given increased commodity demand uncertainty and significantly higher financing costs compared to previous years, we anticipate that farmers will prioritize profitability and efficiency throughout the year".



Agriculture

Ariadne Caballero, Partner at SP Ventures

"The next big thing in 2023 is that AgTech and Climate Tech will continue to converge at an accelerated pace, as it has become clear that there are many opportunities for innovation in agriculture and food that will prove profitable, scalable and impactful on the climate front".



Artificial Intelligence

Daniella Castro, CTO Huna

"The next big thing in 2023 is affordable, reliable, and scalable AI solutions for early detection of chronic diseases using cheap blood exams - like cancer.

Particularly considering LATAM's healthcare sector constantly under severe constraints, such as uneven distribution and access, to support growing demand from an aging population".



Artificial Intelligence

Lincoln Ando, Founder and CEO idwall

"For 2023, the application of AI integrated with other technologies will be essential to provide greater automation of processes and operations, improving decision-making and enhancing the performance of companies.

The use of technologies that intelligently automate processes brings a competitive advantage, being a strategic difference in overcoming the possible global recession, and in the resumption of growth".



B2B Fintech

Bernardo Vale, Founder and CEO Marvin

"The next big thing in 2023 is B2B payment journey as a revenue strategy.

The same people who switched from Taxi/Blockbuster to Uber/Netflix are managing SMBs and expect the same seamless experience".



B2B Fintech

Laura Camargo, B2B Fintech Entrepreneur

"The next big thing in B2B Fintechs in Latam in 2023 is the digitization of payments and workflows.

The processes that involve financial flows B2B have several inefficiencies and companies from different segments with similar pains are adopting new technologies and looking for constant automation to have a clear view of their cash flows".



Creators

Rapha Avellar, Founder and CEO Brandlovrs

"The next big thing in 2023 is creators, large & small, starting their own companies and disrupting every major consumer industry via explosive growth with near zero customer acquisition costs.

Self-selecting consumers want recommendations from real people, whilst also wanting to deeply consume authentic content online.

Therefore, creator-led businesses are not just one more thing to be excited about – it is the evolution of commerce and a monumental shift in consumer purchase behavior."



Crypto

Eduardo Vasconcellos, founder Bits, Stocks and Blocks

"The next big thing in 2023 in crypto will be initiatives focused on real use cases. 2022 was probably the end of projects focused on either (i) retail demand and/or (ii) insider industry demand, both which were fueled by VC money.

We will have a smaller and more regulated industry, a new beginning for this revolutionary technology".



Crypto

Marcelo Sampaio, CEO and Founder, Hashdex

"The next big thing in 2023 is crypto regulation. The lack of clear rules to enforce full transparency among centralized players led to many deceptions in 2022.

While in the future, transparency will be assured by blockchain itself, the technology will take its time to evolve.

Until we get there, the crypto industry will have to rely on regulators to come through with well-thought frameworks that prevent cases like FTX, while it allows Web3 to flourish and reach its full potential".



Culture Building

Francisco "Kiko" de Mello, Founder and CEO Qulture Rocks

"The "next big thing" in 2023 is raising the bar on performance management.

As companies grow their headcounts more conservatively and the power dynamics between employers and employees becomes more balanced, people will have to perform more to (re)earn their positions within teams.

Cultures will adapt, turnover will inevitably spike, but better companies, professionals and persons will arise from this moment of reckoning".



Culture Building

Guilherme Pacheco, Founder and Chairman Mosaico

"The next big thing in 2023 is back to basics. Cultures driven by growth at all costs led by more impulsive founders willing to bet high stakes to accomplish goals at record times will give room to companies seeking growth without craziness and tighter cost control led by more thoughtful founders willing to build companies to last".



Culture Building

Mariana Dias, Founder and CEO Gupy

"The next big thing is People-First Culture and general wellbeing.

In a context that has greatly increased the proportion of employees with a mental health problem combined with the possible period of recession that we will have in 2023, keeping top talent healthy and engaged in companies will be one of the most crucial focuses for business sustainability and that will change the way we work".



Cybersecurity

Alexandre Sieira, Founder e CEO Tenchi

"The next big thing in 2023 is companies realizing that investing only in their own cyber security is not enough.

They will extend the funding and operational support that is commonly provided to key suppliers and channels to include cyber security.

Cooperation and investment rather than audits and shifting blame is what will finally help tame systemic risks".



Cybersecurity

André Ferraz, Founder e CEO Incognia

"The next big thing in 2023 is the recent discovery of liabilities in the widely used facial biometrics recognition system, pointed out by NIST in the USA.

Following the scenario and echoing the position of the North American authorities, Brazil inaugurated the first police station dedicated to investigating documental and biometric fraud in São Paulo last November".



DeepTech

Cristian Hernández-Cuevas, General Partner, Zentynel Frontier Investments

"The next big thing in 2023 is the birth of of TechBio Disciplines that were once considered entirely separate like tech, bio, and physics—are converging to produce incredible new solutions in biology.

We are talking about Biotech 2.0 or TechBio! As AI and biology merge, we will receive more care in our homes and AI-aided doctors will provide treatment recommendations based on our digital and genetic biomarkers"..



DeepTech

Gabriel Perez, Managing Partner Fundo Pitanga.

"The next big thing in 2023 is to leverage the latest advancements in genomics, proteomics, metabolomics, analytical methodologies, bioinformatics, and artificial intelligence in order to interpret interspecies molecular crosstalk and unlock the potential of Latin America's undisputed biodiversity as the basis and inspiration for the development of game-changing medicines, food ingredients, agricultural inputs, and industrial chemicals".



Developers World

Rodrigo Terron, CEO Rocketseat

"The next big thing in 2023 for devs is the mass use of nocode tools. It empowers the non-programmer in day-to-day automation, which makes processes better within companies and more analyzable through the data generated.

Thus, devs will be able to dedicate more time to high-level applications and less time to creating solutions that can be developed simply, making the level of developed technologies rise and the programmer's time more productive".



Developers World

Sibelius Seraphini, Founder Woovi

"The next big thing in 2023 for developers is to leverage artificial intelligence in their workflows. New code, refactoring code and automated tests will be all generated by AI and just reviewed by developers.

We are moving to much higher level "languages" like low-code and no-code. This new developer can be 1000x more productive than existing ones".



Education

Eduardo Mufarej, Founder GKventures

"The next big thing will be education organizations working with governments and the private sector to support young adults (ages 16-25) to enter the job market".



Education

Paulo Silveira, CEO Alura

"The next big thing is that Edtechs in 2023 will finally realize the three obvious things:

1) Lifelong learning cannot be applied as a standard onesize fits all product

2) There is no quick disruption in education;

3) The so called traditional model will gain more spotlight as a laboratory.

Hopefully we will be able to focus on the students and professors, avoiding the pure-tech and pure-gimmick trends. Obviously we learnt a lot from them".



Janaina Dallan, Partner CarbonNext

"The next big thing in 2023 is the understanding of the relevance of nature and its biodiversity. Due to climate change impacts and its consequences, human kind is being forced to value nature and all natural resources.

The way we interact with nature and its communities is changing and it will present technology, education, engagement. In a few years we will see a different concept of Forest".



Luiza de Vasconcellos, Head of ESG Itaú

"The next big thing in 2023 is to integrate ESG topics into the business strategy.

It is urgent to consider social, environmental and climate challenges into company's management. We need to move from a sustainability strategy to a business strategy that uses the core to generate positive impact".



Ana Zucato, Founder e CEO Noh

"The next big thing in 2023 is social finances empowering complete trust between people to move -and talk aboutmoney seamlessly together.

Pay, spend, borrow and invest with family and friends will become possible and common.

It's the perfect match between transactions with social interactions that takes shared finances to the whole new level that is human connection around a theme that's yet a taboo. After all, humans are social creatures and united we thrive".



Carlos Netto, Founder e CEO Matera

"The next big thing in financial technology infrastructure in LATAM 2023 is infrastructure able to support the instant payment revolution.

This kind of transaction is an account-to-account money transfer. It pushes the entire banking infrastructure to handle a volume of transactions it was not designed for. The challenge is more difficult for B2B use cases than for B2C, but most players are sub estimating B2B".



Felipe Lamounier, Co-founder e CEO Chico

"The next big thing in banking is leveraging financial data to drive decisions and relationships. Financial data tells us something inherent to human nature – how we allocate our preferences. With the advances in AI, financial institutions are realizing the value of the data they have and are craving to use AI to unlock its potential.

Machine learning models will allow banks to improve on tasks such as fraud detection and risk management, but the biggest value will come from creating highly personalized experiences for their customers.

By applying AI to financial data, banks will quickly gain a deep understanding of their customers, enabling them to replicate servicing that previously was only possible through long-term relationships with account managers".



Mario Augusto, Co-founder and CEO NG.Cash

"The next big trend in 2023 is Gen Z's massive access to digital money for the first time".



Mike Packer, Partner QED

"The next big thing in 2023 Latam fintech is the importance of regulatory clarity and opportunity. Fintech does better with regulators on its side and the sector will continue to lean into this fact.

Led by Brazil, Latam fintechs will realize that regulation can be their friend. PIX is a wonderful example of a regulator driving innovation – now let's see what can be built around it. Open Banking rules, crypto regulation, and other banking policies will all drive fintech forward in 2023".



Ricardo Josua, Founder and CEO Pismo

"The next big thing for Fintech in 2023 will be the consolidation or the movement from top-line strategies (marketing, customer acquisition, sales etc.) to bottom-line (scale, resiliency, and efficiency).

Cloud technology will provide the critical underlying structure for this, enabling the future of financial services".



Gaming

Bruno PlayHard, Founder and CEO Loud

"Next year we'll continue to see continued growth and evolution for the games industry.

Not only are the current experiences today becoming more easy to build through use of AI driven applications but also new hardware like AR/VR are becoming more ripe for consumer markets creating immersive and interactive experiences.

Games will be done quicker, cheaper while generating new experiences for users".



Gaming

Roberta Coelho, CEO MIBR

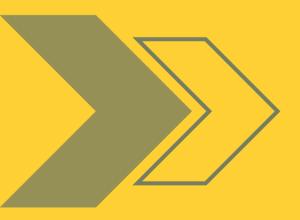
"The next big thing in the eSports and gaming industry in 2023 is to be stablished as a mainstream entertainment experience, reaching new communities, and increasing the number of fans".



Subscribe to our newsletters and stay on top of the Latam market!

There are now more than 8,000 people receiving our authorial content about technology and startups every week! <u>Click here</u>.





Julia De Luca and Lucas Abreu



Growth Capital

Francisco Demalde, Co-Founder and Managing Partner Riverwood Capital

"The next big thing in Growth Capital in 2023 is that it will be the "building year" for Latin American growth companies. We will continue to see a difficult market from the perspective of "investing enthusiasm", some companies will reduce their growth plans and execute headcount reductions, and some might fail as a business or shut down.

We might even see an increasing number of skeptics about the opportunity to build new, tech-driven companies in Latam. However, Latin American entrepreneurs and talent are probably one of the most resilient in the world and are used to and prepared for constant change and cycles. Therefore, we expect them to continue pushing forward, pivoting if required either by design or by force, and focusing more than ever on fundamentals, in order to build businesses that provide a clear superior service or product, and can be sustainable.

Latin America will continue to embrace technology adoption and digitalization, and technology to become even more relevant across most sectors in the economy".



Growth Capital

Martin Escobari, Co President at General Atlantic

"The next big thing in 2023 is to partner with Latam entrepreneurs who want to create global market leaders.

Recent examples of General Atlantic Latam portfolio companies with global/international ambitions include: Hotmart, Gympass, D-Local, InCode and Fluency Academy".



Growth Capital

Paulo Passoni, Investor in Garden Leave

"The best late stage companies are likely to raise convertibles that get triggered at IPO price plus a preferred return. This avoids the need to price them in a period of high uncertainty.

Series B+ valuation will drop dramatically vs 2021 as investors price in lower exit multiples either based on earnings or EBITDA instead of revenues".



Health

Belen Mella, Investor Thrive Capital

"Amidst rapidly rising healthcare costs (growing ~20% YoY), 2023 will see more businesses rely on digital tools to manage benefits spend and sustain margins in a challenging macroeconomic environment".



Health

José Eduardo Guinle, Partner DNA Capital

"The next big thing in LATAM for 2023 is the decentralization and digitization of health care.

The combination of telemedicine, home health care delivery and digitization of pharmacies will cause health care to be more integrated and provided for at home, enhancing access and treatment adherence for the population".



Health

Thomaz Srougi, Founder Dr.consulta

"The next big thing in 2023 is digital therapeutics. Traditional high cost medication will gradually be substituted by evidence based therapeutic interventions run by software and algorithms to change patients behavior and promote the same effect as medication at much lower costs and zero side effects".



LatAm Tech Market

Anna Pinol, Principal NFX

"The next big thing in 2023 is human-AI interaction.

We will see this new technology deeply transform our personal and professional lives.

From AI friends and AI therapists, to powerful AI tools to make us better at our jobs and scale our impact. For a period of time, the people and businesses who master these tools will have a remarkable advantage".



LatAm Tech Market

Ingrid Barth, Co-Founder Linker and President ABstartups

"The next big thing in 2023 is the creation of large sectored ecosystems.

In the last decade, mainly, we learned to contract products and services through applications and segregated platforms, thus generating different types of experiences as users.

I believe that in the coming years we will see these services merge into large experience platforms that consolidate our needs in one place".



LatAm Tech Market

Thiago Maceira, Managing Director Itaú BBA

"The next big thing in 2023 will be LatAm consolidating its position as a relevant tech hub both for talent and also for capital allocation. B2B digitalization, data analytics and vertical software should drive investments in the region".



Legal

Camilla Martes, Partner at Mattos Filho, Venture Capital and M&A

"The next big thing in 2023 are:

(1) Latin America will continue to be in the spotlight in 2023 for opportunities in technology, including M&As transactions and commercial partnerships. Within this scenario LATAM will benefit from the recent legislative changes that promote entrepreneurship, reduce bureaucracy in foreign investment, and regulate new technologies.

(2) 2023 will highlight CVC investments. On the one hand, local big corporations are more structured for investments that create greater agility to research and innovation processes. On the other, there is more conscious on the fact that deep tech development depends on these partners and CVCs become relevant players in the search for sustainable alternatives and responses to climate change.

(3) 2023 will also be a year of greater demand for best practices in corporate governance and reasonable controls by regulatory authorities, in light of the lessons learned from the 2022 winter".



Legal

Fabiana Fagundes, founding partner FM/Derraik

"2023 will be a Darwinian year in the startup fundraising environment. The next big thing in this ecosystem will be the greater participation of Brazilian and foreign companies in investment rounds through its Corporate Venture Capital (CVC) arms.

Startups usually raise money through the "staged financing" model, in which the invested resources are consumed over 18-24 months. The capital raised during the 2020 and 2021 rounds are coming to an end, and venture capital funds (VCs) are more selective and judicious in the selection of startups. Startups have already begun to accept that valuations will be more modest in the next round and have begun to seek, in addition to financial capital, intangible contributions, such as access to a distribution channel (which in Brazil has immense value), databases and mentorships from senior executives of large corporations to accelerate the learning curve and streamline the product market fit.

Corporations that know how to take advantage of the moment and manage to understand the VC investment mindset (win-win; non-controlling, longer-term horizons, etc.) will be the great protagonists of the ecosystem.

Corporations that fail to understand this mindset will also be able to capture opportunities to acquihire startups with technology teams and product that unlock more values for their short-term goals.

In VCs, in turn, "pay-to-play" structures are being discussed — in which investors who do not exercise their pro rata rights in the next round, lose rights won in previous rounds and move to the "passenger seat" " in the startups of their portfolios".



Macroeconomics

Mario Mesquita, Chief Economist Itaú Unibanco

"The next big thing in LATAM in 2023 will be corporate consolidation and upheaval. From Mexico down to Uruguay, central banks across the region implemented aggressive monetary tightening in 2022, and some may well continue to tighten in 2023.

Given limited room for fiscal offsets, and a slowing global economy (we are seeing tightening in the US and Europe too), LATAM GDP growth is likely to slow down substantially.

The environment of much slower growth and appreciably higher interest rates and cost of funding will inevitably hit weaker corporates harder, and these will become acquisition targets. In some specific cases, where incumbents are too weak to fight back, new entrants, unencumbered by heavy debts, should be able to post sharp market share gains. It will be a tough, Darwinian year for LATAM corporates".



Marketing

Daniel Chalfon, Partner Astella

"The next big thing in startup marketing is 2 movements:

(i) The use of Generative AI for the production of communication pieces, in the search for more personalized and relevant communication with scale.

(ii) Brand investments, which should gain more space in more mature tech startups and capitalized in the search for less dependence on performance media, and building awareness in a mass universe".



Marketing

Ricardo Dias, Founder Adventures and BrandLovrs

"The next big thing is YouTube Shorts".



Marketing

Robson Harada, CMO Mercado Bitcoin

"The next big thing in 2023 for marketing will be creating and managing communities. The advent of emerging technologies like NFTs and greater adoption of channels like Discord — especially by younger generations — collaborate and enable better interaction and tangible effects from a community to an organization.

There is an even more significant impact on technology companies, as a strong community has the potential to build more relevant products and services. Getting insights and generating and extracting value through highly engaged and rewarded people will be opportunities to create advocates who become distribution channels for brands. In addition, in a more sophisticated work, it is feasible and virtuous to co-develop and pre-test solutions with communities, aiming to increase the effectiveness of a new project or correct the course of existing projects".



Media

Gustavo Brigatto, Founder and CEO Startups

"The next big thing in 2023 will be the regulation of social media platforms such as Facebook, Google, Twitter and Tik Tok.

Two factors will drive this movement: with new AI tools such as DALL-E and GPT-3 allowing the creation of texts and images almost in na automatic way (and the upcoming presidential election in the US), the fight against misinformation and fake news will reach new grounds.

Another aspect is the need of governments around the world to generate more revenue in order to compensate the slowdown expected with the upcoming recession".



Media

Hernane Ferreia, Founder and CEO The News

"The next big thing in 2023 is media companies producing content that doesn't require the full attention of the reader, listener, or viewer. This stems from the significant reduction in the human being's ability to concentrate — already similar to a small aquarium fish.

Increasingly, people will consume TikTok videos on their mobile screens while watching other content on their Smart TV. Therefore, content designed for the second screen will gain a lot of strength — I read or watch it while doing other things.

Performance marketing will be more challenging in this model, and advertising is once again looking at branding and exposure as primary factors. Due to the excess of options for similar products, the LTV will have more weight than the immediate CAC".



Newsletters

Ernesto Canales, Co-Founder Latinometrics

"The next big thing in 2023 in Latin America is the rise of alternative content consumption, most notably newsletters and independent content creators on Youtube and Twitch (there are still very few LatAm ultra-famous Youtubers and Twitchers).

Some countries in our region ingest unhealthy amounts of social media. However, consumption will peak next year, and Latin Americans will begin to be more selective with their time and attention as they wake up to the harmful effects of excessive social media and get bored of doom scrolling".



Newsletters

Guilherme Lima, Investor Astella and writer of the Dealflow newsletter

"The next big thing is the rise of Artificial Intelligence and the pursuit of control that validates the trust and power of individuals. Given that Artificial Intelligence has done a beautiful job of creating knowledge through text, image, and audio, the question is how do we verify knowledge among people and encourage influence.

This is a clear problem for Web3 to prove its thesis of ownership and empowerment of individuals in conventional markets".



Public Equities

Bruno Garcia, Founding partner at Truxt Investimentos

"The next big thing in 2023 will be how corporations manage some employees desire to keep remote working as the norm, versus the deterioration on corporate culture.

While more can be done remotely to try to infuse employees with companies values, it will become more and more obvious that corporate culture requires in person interactions, including training recently graduates that require an extra degree of handholding given their educational experience with remote learning.

Corporates will push back more and more to in person interaction, with impacts to corporate and commercial real estate in major cities in the world".



Public Equities

Leonardo Otero, Co-Founder Arbor Capital

"The next big thing in 2023 is that it's the year of efficiency, in which companies need to do more with less – and profitability is a universal priority.

After a decade in which the main objective was growth, today's founders need to show that their businesses are self-sustaining.

In a negotiation, capital once again had the final word".



Software as a Service

Alessio Alionço, Founder and CEO Pipefy

"The next big thing in 2023 is that no-code solutions will help even more companies accelerate their digital transformation by providing scalable governance, agility, and empowering citizen developers. These tools facilitate the relationship between business and IT, enabling organizations to quickly and efficiently bring new ideas to fruition at a fraction of the cost of other legacy solutions.

By leveraging no-code, businesses can respond to changing market conditions and customer needs with speed and agility while reducing operational costs".



Software as a Service

Edson Rigonatti, Co-Founder and General Partner Astella

"The next big thing in 2023 is that Latam startups will start ripping the benefits of a decade long of mustering the fundamentals of fast and efficient growth.

Pretty much like soccer in the US - from an afterthought to mainstream - LATAM startups will storm the global tech scene with a diverse vintage of consumer and SMEs software outfits.

First we crawled, then we walked, now we run".



Anderson Thees, Venture Capitalist at Itaú, with the help of GPT3

"The next big thing in 2023 in Latin America is Artificial Intelligence. AI will open new opportunities for businesses to increase efficiency, reduce costs, and gain a competitive advantage.

AI can help businesses automate mundane tasks and make better decisions faster and also help businesses to better target their products and services to customers in Latin America. AI helps identifying potential customers and businesses to better understand their needs. With its potential to improve productivity, AI can help Latin American businesses to remain competitive in an increasingly globalized world".



Julio Vasconcellos and Ana Clara Martins, Partners Atlântico

"The next big thing in 2023 is the move towards open health. After the success of open banking in Brazil, payers, providers and regulators are seeing the benefit of data interoperability.

We expect this change to be much more gradual than what we saw in financial services, but an open health system combined with the sophisticated software and predictive data analytics being offered by emerging players, will (hopefully!) transform care in Brazil over the next decade".



Laura Constantini, Co-Founder and General Partner Astella

"The next big thing are innovations and investments flowing to structural sectors such as logistics and agro-industry.

In the medium term, humanity is heading to a significant change in how we generate energy - renewables will reduce marginal energy costs to nearly zero. This is a tremendous shift for most industrial, transportation, and logistics processes in which energy is one of the top 3 most important costs.

We will be able to unlock value and serve a more significant portion of our population in essential services and needs".



Lucas Lima, Co-funder at LASP Capital

"The next big thing in Latin America is going to be "globally native" venture-backed companies.

While the pandemic may have disrupted globalization in trade and supply chains, the changes in habits, culture, and processes imposed by Covid-19 have permanently changed how and where we work, globalizing the talent pool for technical employees. This brings enormous opportunities, but also direct cost implications for Latin American companies.

To compete with a globalized cost structure for talent, venturebacked companies from Latin America will start targeting global revenue streams from day one".



Wellness / Femtech

Stephanie Von Sta – Founder and CEO at Oya

"The next big thing is a female consumer health tech company that supports socio-economically gender, and racially diverse populations.

Today, female bodies represent 80% of the healthcare market, but solutions rarely consider their specific needs. The future holds a human-centered care model that delivers technology and healthcare in equal measure".



Wellness / Femtech

Tatiana Pimenta, Founder e CEO Vittude

"The next big trend in Wellness is people taking social media breaks and disconnecting from technology in general on a regular basis as therapy and an attainable self-care goal".

The Next Big Thing LatAm 2023

Julia De Luca and Lucas Abreu