revista Eptic
v. 28, n. 1, jan.-abr., 2026
ISSN: 1518-2487

Plataformização no Brasil: trajetórias setoriais contrastantes em uma economia digital periférica

Plataformización en Brasil: trayectorias sectoriales contrastantes en una economía digital periférica

Platformization in Brazil: contrasting sectoral trajectories in a peripheral digital economy

Tulio Chiarini

Pesquisador no Centro de Pesquisa em Ciência, Tecnologia e Sociedade (CTS) da Diretoria de Estudos e Políticas Setoriais, de Inovação, Regulação e Infraestrutura (Diset), Instituto de Pesquisa Econômica Aplicada (Ipea). E-mail: tulio.chiarini@ipea.gov.br.

Submetido em: 07 nov. 2025

Aprovado em: 20 abr. 2026

Resumo

Com base em dados setoriais, este artigo examina dois mercados mediados por plataformas com trajetórias contrastantes no Brasil. O setor de mecanismos de busca (*search engine*) ilustra uma fase inicial de surgimento de plataformas domésticas, seguida por rápida aquisição por grandes empresas de tecnologia estrangeiras e subsequente monopolização do mercado. Em contraste, o setor de *marketplaces* de varejo evoluiu para o domínio de plataformas mais diversificado do país, caracterizado por intensa competição entre empresas internacionais e nacionais, bem como por iniciativas emergentes voltadas para o desenvolvimento de uma plataforma pública de varejo.

Palavras-chave: Plataforma digital; Economia digital; Competição.

Resumen

Basándose en datos sectoriales, este artículo examina dos mercados mediados por plataformas con trayectorias contrastantes en Brasil. El sector de los motores de búsqueda (*search engine*) ilustra una fase temprana de surgimiento de plataformas nacionales, seguida de una rápida adquisición por parte de grandes empresas tecnológicas extranjeras y la posterior monopolización del mercado. En contraste, el sector de los mercados minoristas se ha convertido en el dominio de plataformas más diversificado del país, caracterizado por una intensa competencia entre empresas internacionales y nacionales, así como por iniciativas emergentes destinadas a desarrollar una plataforma minorista pública.

Palabras-clave: Plataforma digital; Economía digital; Competencia.

Abstract

Drawing on sectoral data, this article examines two platform-mediated markets with contrasting trajectories in Brazil. The search engine sector illustrates an early phase of domestic platform emergence followed by rapid acquisition by large foreign technology companies and subsequent market monopolization. In contrast, the retail marketplace sector has evolved into the most diversified platform domain in the country, characterized by intense competition between international and domestic firms, as well as emerging initiatives aimed at developing a public retail platform.

Keywords: Digital platform; Digital economy; Competition.

1. Introduction

Platformization refers to the process through which digital platforms rise as the dominant infrastructural and economic model of the social web, as proposed by Helmond (2015) when analyzing the transformation of social network websites into social media platforms. However, this phenomenon extends far beyond social media. As Poell et al. (2019, p. 4-5) argues, platformization can be defined as "the penetration of the infrastructures, economic processes, and governmental frameworks of platforms in different economic sectors and spheres of life". In line with this expanded view, Martins and Bolaño (2025) argue that platformization is a comprehensive process permeating all spheres of sociability, occurring concretely through the establishment of digital platforms that operate based on digitalization and on the collection and processing of data.

Although the expansion of digital platforms is a global phenomenon (Cusumano; Gawer; Yoffie, 2019; Ribeiro; Silva; Chiarini, 2025), its trajectories are far from uniform. Recent scholarship has emphasized that platformization unfolds through context-specific institutional arrangements, reflecting the interaction between digital corporations, national regulatory frameworks, industrial capabilities, and geopolitical hierarchies (Foster, 2024; Van Doorn; Mos; Bosma, 2021). Concepts such as *platform variations* (Foster, 2024), *platform governance regimes* (Calvo; Kenney; Zysman, 2024), *platform capitalisms* (Steinberg; Zhang; Mukherjee, 2025) and *varieties of platform capitalism* (Ametowobla; Kirchner, 2025) have been proposed to capture these differentiated configurations and to move beyond universalized accounts largely derived from the experiences of the United States (U.S.) and China.

These debates are particularly relevant in peripheral economies, where the expansion of global digital platforms intersects with long-standing patterns of technological dependence and uneven development (Bolaño; Barreto; Valente, 2022; Chiarini; Silva; Prates, 2025; Franco; Graña; Rikap, 2024; Seto, 2024; Valente; Grohmann, 2024). Brazil offers a particularly relevant case. As one of the world's largest economies (ranked 10th in GDP by the World Bank in 2024 with USD 2.17 trillion), the country combines widespread adoption of platform-mediated services among individuals and businesses (see Annex). As of 2024, 81% of Brazilians used social media platforms and 46% shopped online — with 90% of online shoppers relying on digital platforms. By 2024, 89% of local businesses maintained social media profiles, and 62% sold products digitally. Of these businesses, 22% used marketplaces platforms like Amazon or MercadoLibre, 42% conducted sales via social media platforms, while 81% via Over-the-Top (OTT) messaging platforms such as WhatsApp. Moreover, while many Brazilian companies have adopted platform models (Silva; Chiarini; Ribeiro, 2024), there is relatively limited domestic control over key digital platforms (Silva; Chiarini, 2025). Yet the degree of foreign dominance varies significantly across sectors, reflecting different technological barriers, competitive dynamics, and historical trajectories of market development.

This essay investigates these differentiated trajectories through a comparative analysis of two sectors that illustrate contrasting patterns of platformization in Brazil: search engines and e-commerce marketplaces. While the search market became rapidly concentrated under the control of a single global platform, the retail marketplace sector presents a more plural configuration, with the presence of both domestic and foreign competitors. By comparing these sectors, the article aims to highlight how different competitive dynamics shape the emergence, consolidation, or displacement of domestic platforms in a middle-income country.

Rather than aiming to provide a comprehensive account of the entire Brazilian platform economy — since other sectors cannot be examined within the space constraints of this essay and have in part been investigated in existing studies, such as those on food delivery platforms (Seto, 2024; Silva; Chiarini, 2026) and ride-hailing platforms (Tozi, 2020, 2024) — this paper adopts a sectoral comparative approach to explore how distinct platformization trajectories develop.

By doing so, the essay contributes to the literature on platform studies in the Global South in two ways. First, it provides an empirically grounded comparison of sectoral trajectories of platformization within a major peripheral economy. Second, it highlights how different market structures produce distinct patterns of dependence on global platforms.

Methodologically, the essay adopts a qualitative comparative sectoral approach of two platform-mediated markets — search engines and e-commerce marketplaces. The comparison focuses on a common set of analytical dimensions — the number and origin of competing platforms, the timing of market entry, market performance indicators (such as market capitalization or web traffic), and the evolution of market structure —, and the analysis draws on secondary data, corporate reports, market studies, regulatory documents, and existing academic literature on digital markets in Brazil. Rather than aiming at statistical generalization across all platform sectors, the objective is analytical: to use contrasting sectoral cases to illuminate broader dynamics of platformization and dependence on foreign platforms in a large peripheral digital economy.

2. Competitive dynamics in the Brazilian platform economy

The *Asociación Latinoamericana de Internet* (ALAI) identified 252 platform companies operating in Brazil[1,2]. Out of them, 70.24% are domestic (Box 1). U.S. companies hold a significant share, representing 13.10% of the total, followed by Chinese companies at 3.57%. Other countries, such as Argentina (2.78%) and France (1.59%), also maintain a notable presence, with platform companies from these nations gaining ground in the Brazilian market.

---

1 The Brazilian Finance Ministry (*Ministério da Fazenda*) has published reports offering general insights; however, these do not specify the companies involved (FALCO, 2024; MF, 2024). Similarly, Silva, Chiarini and Ribeiro (2024) provide an initial mapping of Brazil's platform economy, though their analysis focuses exclusively on domestic platforms.

2 ALAI (2024) identifies platform companies in Brazil based on two criteria: their classification under the *Classificação Nacional de Atividades Econômicas* (CNAE) for digital economy activities and their inclusion in the "*Lucro Real*" ("Real Profit") tax regime. The "*Lucro Real*" tax regime, part of Brazil's fiscal framework, applies to companies with annual revenues exceeding R$78 million and involves more complex compliance requirements. Notably, this revenue threshold aligns with the R$70 million benchmark proposed in Brazilian Bill 2,768/2022, which outlines the economic regulation and antitrust enforcement of digital platforms. Therefore, the "*Lucro Real*" classification serves as a reliable public indicator for identifying companies subject to such regulations. ALAI's dataset excludes smaller firms, such as startups, which typically adopt simpler tax regimes like "*Lucro Presumido*" or "*Simples Nacional*" to minimize costs. Despite this limitation, this database remains the most comprehensive and reliable source currently available for studying digital platforms in Brazil.

Box 1 – Heat map of large platform companies operating in Brazil, by country and sector

Country	Sectors																		Total	% in relation to total platforms
	Business	Dating	Delivery	Digital Content	Education	Electronics	Entertainment	Agro	Health	Human resources	Real estate	Retail	Search engine	Social network	Software	Transport	Travel	Others		
Argentina								1			1	4					1		7	**2.78**
Brazil	4	2	20	3	6	2	11	5	9	6	12	54		2	4	20	5	12	177	**70.24**
Canada					1														1	**0.40**
China			1			1						4	1	2					9	**3.57**
Colombia			2																2	**0.79**
England												1							1	**0.40**
France				1						1		2							4	**1.59**
Germany							1					1				1			3	**1.19**
India					1														1	**0.40**
Israel																1			1	**0.40**
Japan												1							1	**0.40**
Mexico												1							1	**0.40**
Netherlands												2					1		3	**1.19**
Norway												1							1	**0.40**
Singapore												1							1	**0.40**
Spain			1									1							2	**0.79**
Sweden				2														1	3	**1.19**
Switzerland																		1	1	**0.40**
USA	1	3		5		1	3		1		1	2	2	8	2	1	2	1	33	**13.10**
Total	**5**	**5**	**24**	**11**	**8**	**4**	**15**	**6**	**10**	**7**	**14**	**75**	**3**	**12**	**6**	**23**	**9**	**15**	**252**	**100.00**

Source: Silva and Chiarini (2025, p. 09).

While it is not new that Brazil has entered the "platform era", marked by the rise of domestic companies controlling digital platforms (Silva; Chiarini; Ribeiro, 2024), it is unexpected to find 177 large Brazilian platform companies. The positions of U.S. and Chinese companies in second and third place, respectively, are not surprising. These countries represent the two largest hubs of the global platform economy (Rikap; Lundvall, 2021) and have been successful in exporting their technological solutions to other regions of the world. The fact that there are nearly four times more U.S. platform companies than Chinese ones in Brazil reflect the strong influence of the U.S. digital platform economy in the country, although the significant presence of Chinese platforms should not be overlooked.

Brazil's digital platform landscape is characterized by a broad diversity of sectors, with notable dominance in certain segments and the quantitative leadership of Brazilian companies in many of them (Silva; Chiarini, 2025). The "heat map" presented in Box 1 underscores the sectors where Brazilian platform companies predominate, while also highlighting the significant presence of U.S. companies in the "digital content" and "social networks" sectors; as well as the strong representation of Chinese and Argentine firms in the "retail" sector (Silva; Chiarini, 2025).

These sectoral concentrations are not incidental; they reflect the strategic priorities of specific countries in relation to their export of digital platforms to Brazil. The U.S. emerges as the principal international player in Brazil's digital platform ecosystem. With a diverse portfolio of platforms operating in key sectors such as "Business," "Digital Content," "Social network," and "Search engine," U.S. companies have established a strong foothold in areas that are deeply integrated into the daily digital interactions of Brazilian consumers and businesses (see Annex for figures on Brazilian adoption of digital platforms). Particularly, the "Search engine" and

"Social network" sectors are overwhelmingly dominated by U.S. companies, illustrating both the technological leadership of the U.S. in these domains and the global reach of its major platforms.

In contrast, China's influence is more concentrated, particularly in the "Retail" sector. This aligns with China's broader global strategy of expanding e-commerce and consumer-oriented services (O'regan; Li, 2019), signaling that Chinese companies are targeting Brazil's rapidly growing online commerce (Silva; Duarte, 2025). European countries, while present, exhibit a more specialized and less widespread impact. For instance, France, Germany, and the Netherlands have established platforms within sectors such as "Health," "Retail," and "Software," suggesting a niche-market approach that caters to specific areas of the Brazilian economy.

In summary, the "heat map" demonstrates Brazil's capacity to develop and sustain domestic digital platforms across multiple sectors. At the same time, it reveals strategic domains in which international companies — especially those based in the U.S. and Asia — have secured a competitive advantage. This coexistence of robust domestic platforms and strong foreign competitors suggests platformization trajectories characterized by openness to external investment and competition (Silva; Chiarini, 2025); nonetheless, Brazil has yet to produce homegrown platform champions that can achieve global scale — a limitation illustrated by the case of iFood, which, despite their domestic prominence, does not expand internationally (Dantas, 2023). This pattern contrasts with other platformization trajectories, such as China's state-led protectionism, the European Union's regulatory approach, India's digital public infrastructure model (Calvo; Kenney; Zysman, 2024), and Russia's attempts to develop national platforms by replacing global platform providers with national champions (Kontareva; Kenney, 2023, 2024).

Two platform-mediated markets were selected — search engines and e-commerce marketplaces — and are analyzed next. They represent analytically contrasting trajectories of platformization in Brazil. While the search sector illustrates a rapid consolidation under a dominant global platform following the early presence of domestic initiatives, the retail marketplace sector displays a more heterogeneous competitive structure, with the continued presence of domestic firms alongside international platforms. The comparison focuses on a common set of analytical dimensions, including the number and origin of competing platforms, the timing of market entry, market performance indicators (such as market capitalization or web traffic), and the evolution of market structure.

2.1 Search engine sector

Search engine platforms are interactive content circulation platforms that rely on network effects generated through user and third-party content. Their main revenue stream comes from monetizing this user activity by selling audience attention to advertisers (Martins; Bolaño, 2025). The search sector represents a core informational infrastructure of the digital economy, characterized by strong data advantages, algorithmic complexity, and powerful network effects that tend to produce highly concentrated global markets (Gawer, 2021; Mansell; Steinmueller, 2020; Srnicek, 2017). From a political economy perspective, such infrastructures play a strategic role in the organization of informational capitalism and in the control of communication flows (Bolaño; Barreto; Valente, 2022).

Box 2 illustrates that there are currently only two major search platform companies operating in Brazil both controlled by private companies. The Chinese company Baidu, which controlled the Hao123 platform designed for Portuguese-language searches, ceased its operations in the country, despite being mentioned in the ALAI report. Baidu's main product, its internet search engine — dominant in China — was discontinued in Brazil in 2015, and by 2018, the company had completely exited the Brazilian market (Agrela, 2018; Brigatto, 2018).

For years, the primary search engine in Brazil has been Google platform (controlled by Alphabet), which commands over 95% of the market share (Figure 1). However, this dominance was not always the case. In the early commercial phase of the Internet, a profusion of startups around the world experimented with web indexing services (Fragoso, 2007). In Brazil, the search engine *Cadê?* enjoyed significant success. Launched in the 1990s, *Cadê?* became the largest Brazilian search engine and the fifth most visited portal in the country (Mattos, 2002). Developed by undergraduate students of State University of Rio de Janeiro (UERJ), it was the first fully Brazilian search engine, inspired by international models such as Yahoo, then a global reference in web directories. In addition to web searches, *Cadê?* introduced several innovative features. However, the platform relied on manual cataloging of webpages, which soon became a major limitation as the volume of online content expanded. At the same time, competitors like AltaVista — also launched in 1995 — were already adopting automated indexing to improve search efficiency (Bernardi, 2025). In 2002, *Cadê?* was acquired by Yahoo!.

Box 2 – Foreign platform companies operating in Brazil by origin of capital, search engine

Country	Platform Company	Foundation Year	Year of entry in Brazil	Market cap
China	Baidu	2000	2012[1]	USD 42.95 billion
USA	Google (Alphabet)	1998	2005[2]	USD 3.414 trillion
	Yahoo!	1994	1999[3]	USD 50.38 billion[4]

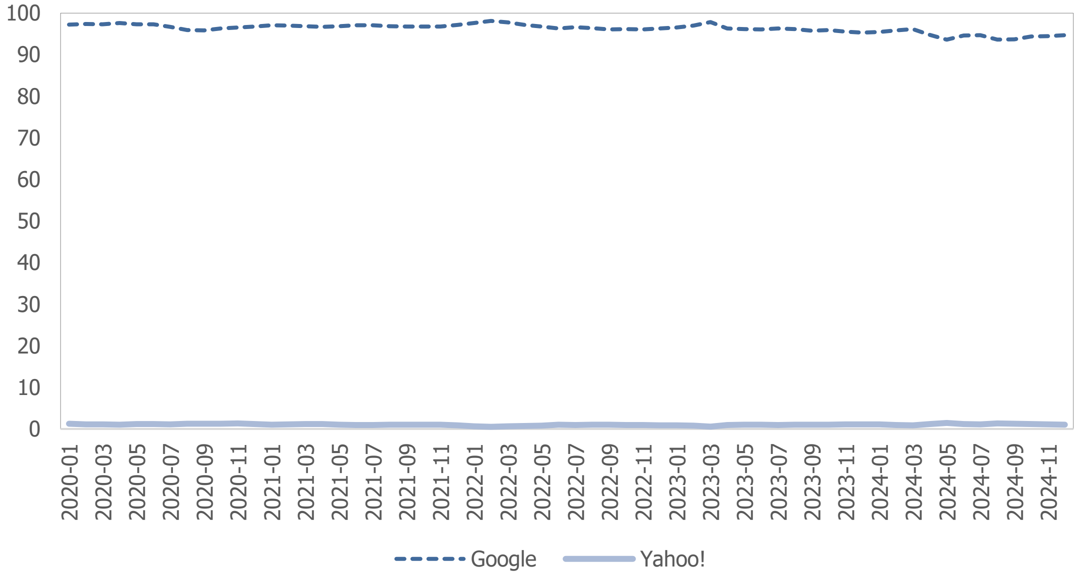
Source: Authors' own. Data sourced from ALAI (2024), SimilarWeb, and <https://companiesmarketcap.com> (market cap consulted in 05/11/2025). Note: [1]<https://www.reuters.com/article/technology/china-s-baidu-takes-control-of-brazil-s-peixe-urbano-in-expansion-push-idUSKCN0HY1EL/>; [2]<https://www.cnnbrasil.com.br/tecnologia/google-faz-15-anos-no-brasil-e-foca-em-missao-de-tornar-empresa-mais-global/>; [3]<https://www.wsj.com/articles/SB928887406465345083>, accessed on 11/03/2026. [4]The last known market cap of Yahoo Inc. refers to June 2017, as it was acquired by Verizon.

Another noteworthy example of a homegrown search engine is *TodoBR*, developed in 2000 by researchers at the Federal University of Minas Gerais (UFMG). By focusing exclusively on the Brazilian web, *TodoBR* narrowed the scope of searchable content, offering users results that were both highly precise and contextually relevant. The platform archived the entire Brazilian web, approximately 5 million pages, thereby ensuring comprehensive coverage of all ".BR" domains. Additionally, *TodoBR* supported searches across multiple document formats, including plain text, HTML, Postscript (PS), Word (Doc), and PDF. (Santos, 1999).

TodoBR's technological infrastructure incorporated state-of-the-art features, enabling it to revisit and update all indexed documents from the Brazilian web within just a few days. One of its most innovative functionalities was the ability to geographically refine search queries, allowing users to focus on specific states or regions within Brazil. This feature greatly enhanced the relevance of search results, enabling tasks such as efficiently locating individuals while reducing ambiguity caused by homonyms through the specification of a state of residence. (Santos, 1999).

The search engine also accounted for the nuances of the Portuguese language, supporting accented characters in search queries to further refine results. *TodoBR* also employed cutting-edge, proprietary compression algorithms, significantly accelerating query processing times and establishing itself as a leader in search engine technology. (Santos, 1999).

Figure 1: Search engine market share, Brazil, 2020-2024



Source: Authors' own. Data sourced from Statcounter.

The innovative design and functionality of *TodoBR* culminated in its acquisition by Google in 2005 (Lima, 2005), underscoring its influence on the evolution of localized digital search technologies. Both *Cadê?* and *TodoBR* represent critical milestones in the history of Brazil's digital landscape, showcasing the potential of indigenous technological initiatives. Their disappearance from the Brazilian market was not due to inefficiency; on the contrary, both platforms were acquired precisely because they embodied innovative and forward-thinking tools for the digital economy. However, with Google's rise to dominance as the leading search engine, Brazil's search engine market has since evolved into a near-monopolistic structure, marked by a lack of significant competition within the sector.

2.2 Retail sector

Retail marketplace platforms are considered transactional platforms for trading or sharing goods and services. Their main activity is intermediate the sale of goods, merchandise, and services — whether from third parties or their own inventory. Their primary funding comes from fees generated through this intermediation (Martins; Bolaño, 2025).

Retail stands out as the sector with the largest number of platform companies in Brazil, attracting firms from numerous countries and reinforcing its competitive and internationalized nature. The data suggest that retail has served as primary entry point for the "platformization" of traditional incumbents (Alai, 2024). Companies such as Arezzo, Renner, Riachuelo, Leroy Merlin, Carrefour, and C&A exemplify this transformation, having converted their websites and e-commerce channels into transactional platforms. By positioning themselves as digital intermediaries, these companies illustrate a broader trend among traditional retailers adapting to the platform economy. This shift has enabled incumbents to redefine their monetization models and directly compete with native platform companies such as Shopee.

Among international companies operating in Brazil, the Argentine firm Mercado Libre and its subsidiary Mercado Pago hold a particular strong position. As the largest platform in Latin America, Mercado Libre reported 148 million active users across all platforms in 2022. Although the company operated in 18 countries that year, 95% of its net revenue originated from Brazil (54%), Argentina (24%), and Mexico (18%) (Franco; Graña; Rikap, 2024). China has also established a significant and diversified presence in Brazil's digital retail sector, with platforms such as Ushare, Shein, AliExpress, and Alive App employing various market strategies. However, new taxation rules introduced in 2023 — known as the "*taxa das blusinhas*" — have created challenges for foreign retailers. The policy imposes a 17% VAT on international e-commerce purchases under USD 50, ending a tax exemption that previously allowed foreign platforms to offer lower prices and gain market share.

These changes can reshape competition, particularly impacting Shein and Shopee, which depend on high volumes of small-value transactions. Higher costs for consumers may reduce demand for foreign platforms while opening opportunities for domestic retailers. Some international companies have adjusted pricing strategies or expanded local operations to offset the impact, but the long-term market effects remain uncertain.

These initial findings suggest that the retail sector may be more open to the coexistence of multiple digital platforms, both domestic and international companies. However, website traffic indicators reveal a high level of concentration. Despite the large number of Brazilian retail platforms, the top-ranking platforms in terms of popularity are predominantly foreign. Mercado Livre ranks first, accounting for over 252 million of visitors in both desktop website and mobile app, followed by Amazon (U.S.) and Shopee (Singapore) with 214 million and 136 million visitors respectively. Together, these three companies account for approximately 65%, or two-thirds, of total retail traffic.

Box 3 – Selected large platform companies operating in Brazil by origin of capital, retail

Country	Platform Company	Foundation Year	Year of entry in Brazil	Website Performance			Brazilian traffic share (%)
				Total visits in millions of visitors[1]	Desktop (%)	Mobile Web (%)	
Argentina	Trocafone	2014	2015	1.688	20.88	79.12	99.63
	Nuvemshop	2011	2011	1.759	52.05	47.95	95.46
	MercadoLibre	1999	1999	252.000	50.18	49.82	98.50
	Mercado Pago	2004	2004	16.850	42.91	57.09	98.86
Brazil	Arezzo	1972	1972	3.558	22.07	77.93	98.26
	Elo7	2008	2008	13.570	31.20	68.80	96.76
	Enjoei	2009	2009	9.201	37.83	62.17	97.53
	Estante Virtual	2005	2005	3.797	43.99	56.01	96.62
	KaBuM	2003	2003	21.810	51.56	48.44	98.93
	Lojas Americanas	1929	1929	22.450	26.52	73.48	97.08
	Lojas Renner	1965	1965	17.280	21.51	78.49	98.93
	Lojas Riachuelo	1947	1947	10.410	15.04	84.96	98.41
	MadeiraMadeira	2009	2009	14.310	24.01	75.99	98.88
	Magalu	1957	1957	72.540	15.82	84.18	98.61
	Mobly	2011	2011	2.086	33.11	66.89	98.97
	Pernambucanas	1908	1908	0.692	24.44	75.56	99.19
	Shoptime	1995	1995	0.237	15.57	84.43	97.99
	Submarino	1999	1999	0.232	27.96	72.04	91.17
China	Shein	2008	2022	10.912	73.56	26.44	100.00
	AliExpress	2010	2019	20.280	72.74	27.26	95.00
France	Leroy Merlin	1923	1998	14.700	28.72	71.28	98.78
	Carrefour	1959	1975	18.040	20.93	79.07	99.07
Germany	Dafiti	2011	2011	16.050	24.20	75.80	98.60
Mexico	Merama	2020	2020	0.007	66.97	33.03	53.76
Netherlands	C&A	1841	1976	8.832	15.22	84.78	99.39
Singapore	Shopee	2015	2019	136.700	38.12	61.88	99.19
Spain	Privalia	2006	2008	0.022	0.42	99.58	100.00
USA	Amazon	1994	2012	214.000	34.96	65.04	98.19

Source: Authors' own. Data sourced from ALAI (2024) and from SimilarWeb. Note: [1]November 2024.

Among Brazilian retail platforms, a notable concentration of market power exists, although the visitor numbers for domestic platforms remain significantly lower compared to the dominant trio of Mercado Libre, Amazon, and Shopee. Within this context, Magalu stands out as the most visited domestic platform in Brazil, attracting over 72 million visitors (Box 3). Magalu's evolution offers a compelling case study of digital transformation and strategic adaptation in the retail sector. Founded in 1957 as a traditional retail chain, Magalu entered e-commerce in 2000 with the launch of its online store. In 2015, it began a digital transformation to evolve into a full-fledged platform, adopting a marketplace model that allowed third-party sellers to join its platform, significantly expanding its product offerings. To bolster its digital ecosystem, Magalu pursued strategic acquisitions, including Netshoes in 2019, Estante Virtual in 2020, and KaBuM in 2021, among others (Lyra; Machado; Fonseca, 2025). These moves supported its ambition to become a superapp, further strengthened by the launch of MagaluPay, its digital payment solution. Magalu's transition illustrates the transformative potential of platformization in traditional retail sectors (Dias; Rodrigues; Santos, 2022).

As we suggested, the retail sector may be more open to the coexistence of multiple digital platforms in Brazil, and maybe because of this, new entrants are joining the market. For example, the marketplace platform *Mais Correios*, developed by the Brazilian Post and Telegraph Company (*Empresa Brasileira de Correios e Telégrafos* – Correios), was launched in July 2025, entering a field long dominated by incumbents such as MercadoLibre and Amazon — both active in Brazil since the 1990's — as well as new challengers like ByteDance, which introduced its TikTok Shop in May 2025[3] (as for this reason it was not in ALAI's list), promising to intensify competition through the concept of "discovery-based shopping"[4].

With the stated goal of "innovating the national e-commerce market," *Mais Correios* is premised on promoting "greater inclusion in digital commerce across the country, thanks to the unique reach of Correios' logistics network"[5]. Traditional media outlets presented the initiative as part of the company's broader diversification strategy — an effort both to generate new revenue streams and to stimulate competition in Brazil's marketplace sector[6].

Functionally, *Mais Correios* operates as a conventional multi-sided transactional marketplace, allowing businesses to register and sell any legally permitted product while enabling consumers to purchase from these sellers. According to its official website, all vendors are periodically evaluated based on service quality and customer satisfaction criteria. However, in this respect, the platform does not yet demonstrate a clear competitive advantage over incumbent players such as MercadoLibre.

---

[3]Available at: https://newsroom.tiktok.com/pt-br/tiktok-shop-chega-ao-brasil, accessed on 17/09/2025.

[4]Available at: https://g1.globo.com/tecnologia/noticia/2025/05/08/tiktok-shop-rede-social-lanca-loja-virtual-no-brasil-para-concorrer-com-amazon-e-magalu.ghtml, accessed on 17/09/2025.

[5]Available at: https://blog.correios.com.br/2025/04/02/nosso-marketplace-esta-chegando-cadastre-se-e-garanta-descontos-exclusivos/, accessed on 17/09/2025.

[6]Available at: https://www.estadao.com.br/economia/correios-lancam-marketplace-proprio-com-mais-de-500-mil-itens-saiba-como-acessar-nprei/?srsltid=AfmBOop8rQE4ZcwsmDO6f0mqg7XocrgxFrnaEdp90BWMcQm5q17-qYfX, https://veja.abril.com.br/coluna/radar/correios-mantem-contrato-com-empresa-que-desenvolve-marketplace-sob-sigilo/, https://exame.com/invest/mercados/rivalidade-com-mercado-livre-como-vai-funcionar-o-novo-marketplace-dos-correios/, and https://www1.folha.uol.com.br/mercado/2025/07/em-meio-a-prejuizo-bilionario-correios-apostam-em-marketplace-para-diversificar-receita.shtml, accessed on 17/09/2025.

3. Final considerations

The analysis developed in this article highlights that platformization in Brazil does not follow a single or uniform trajectory. Instead, it unfolds through differentiated sectoral dynamics shaped by technological characteristics, competitive structures, and the historical evolution of domestic capabilities.

The comparison between search engines and retail marketplaces illustrates this heterogeneity. In the search sector, the trajectory was marked by the rapid displacement or acquisition of early domestic initiatives and the consolidation of a dominant global platform. This configuration reflects strong network effects, massive data advantages, and high technological barriers to entry, which together reinforce global market concentration. In contrast, the retail marketplace sector presents a more plural landscape, where domestic and foreign platforms coexist and compete within a market structured not only by digital capabilities but also by logistics infrastructures, payment systems, and local commercial networks. Notwithstanding that, while retail marketplaces are relatively more competitive and dynamic — featuring national players like Magalu and Americanas alongside MercadoLibre, Amazon, and Shopee — platformization has deepened market concentration. The leading firms have outpaced Brazilian competitors in terms of user base, technological capabilities, and international integration. For example, MercadoLibre attracts more than three times the monthly visits of Magalu. Even in a sector with a relatively stronger national presence, Brazilian platforms struggle to scale and compete, raising concerns about long-term dependence on foreign digital infrastructures.

Rather than offering a definitive characterization of the entire Brazilian platform economy, the findings of this article underscore the importance of sector-specific analysis for understanding how platformization interacts with national institutional contexts. Future research could expand this approach by examining additional sectors to further explore the diversity of platform governance regimes emerging across the Brazilian digital economy.

References

AGRELA, Lucas. **O que o Baidu fazia no Brasil. Depois do antivírus, do buscador e da loja de apps, o Google da China deixou o país**. 2018. Disponível em: https://exame.com/tecnologia/o-que-o-baidu-fazia-no-brasil/. Acesso em: 1 jan. 2025.

ALAI. **Avaliação econômica e concorrencial do PL nº 2.768/2022: experiência internacional, identificação das empresas sujeitas à regulação e estimação dos impactos econômicos**. Montevideo (Uruguai): Asociación Latinoamericana de Internet (ALAI), 2024. Disponível em: https://alai.lat/wp-content/uploads/2024/09/PT-ALAI-PL2768-22-Brasil-Set2024.pdf.

AMETOWOBLA, Dzifa; KIRCHNER, Stefan. Varieties of platform capitalism? Competition, regime types and the diversity of food delivery platforms across Europe and North America. **Socio-Economic Review**, v. 23, n. 2, p. 899–931, 2025.

BERNARDI, Guilherme. Brasil já teve "um Google" muito antes do Google: relembre o que aconteceu com o buscador Cadê? **Exame**, *[S. l.]*, 2025. Disponível em: https://exame.com/tecnologia/brasil-ja-teve-um-google-muito-antes-do-google-relembre-o-que-aconteceu-com-o-buscador-cade/.

BOLAÑO, César Ricardo Siqueira; BARRETO, Helena Martins do Rêgo; VALENTE, Jonas Chagas Lúcio. Para a análise teórico-metodológica das plataformas digitais como estruturas de mediação a partir da economia política da comunicação. **Avatares de la Comunicación y la Cultura**, v. 24, p. 1–20, 2022.

BRIGATTO, Gustavo. **Chinesa Baidu vai encerrar operações no Brasil até setembro**. 2018. Disponível em: https://valor.globo.com/empresas/noticia/2018/07/05/chinesa-baidu-vai-encerrar-operacoes-no-brasil-ate-setembro.ghtml. Acesso em: 1 jan. 2025.

CALVO, Angela Garcia; KENNEY, Martin; ZYSMAN, John. Responding to platform firm power: differing national responses. **New Political Economy**, p. 1–15, 2024.

CHIARINI, Tulio; SILVA, Victo; PRATES, Bruno Prado. A plataformização tardia e o subdesenvolvimento. *Em*: ANAIS DO XXX ENCONTRO NACIONAL DE ECONOMIA POLÍTICA 2025, Universidade Federal de Campina Grande, Campina Grande (Brasil). **Anais** [...]. Universidade Federal de Campina Grande, Campina Grande (Brasil): Sociedade Brasileira de Economia Política (SEP), 2025. p. 1–26. Disponível em: https://enep.sep.org.br/uploads/2610_1741794975_artigo_SEP_identificado_2025_pdf_ide.pdf.

CUSUMANO, Michael A.; GAWER, Annabelle; YOFFIE, David B. **The Business of Platforms: Strategy in the Age of Digital Competition, Innovation, and Power**. [s.l.] : Harper Business, 2019.

DANTAS, Maira Mellise Nogueira. **De-internationalization. Analysis of a Brazilian Food Delivery Service Company**. 2023. Dissertação de Mestrado - Universidade Federal do Rio de Janeiro (UFRJ), *[S. l.]*, 2023.

DIAS, André Lamblet; RODRIGUES, Adriano; SANTOS, Felipe Ferreira Simões Dos. Da transformação digital ao superapp Magalu: impactos contábeis dos investimentos em startups. **Revista Brasileira de Casos de Ensino em Administração**, v. 12, n. 1, p. 1–20, 2022.

FALCO, Guilherme de Aguiar. **Plataformas digitais no Brasil: fundamentos econômicos, dinâmicas de mercado e promoção de concorrência**. Brasília. Disponível em: https://www.gov.br/fazenda/pt-br/central-de-conteudo/publicacoes/relatorios/relatorio-economico_plataformas_publicacao_rev.pdf.

FOSTER, Christopher. Conceptualizing variety in platform capitalism: the dynamics of variegated capitalism in Thai digital marketplace platforms. **Globalizations**, v. 21, n. 5, p. 970–989, 2024.

FRAGOSO, Suely. Quem procura, acha? O impacto dos buscadores sobre o modelo distributivo da World Wide Web. **Eptic online: revista electronica internacional de economia política da informação, da comuniçao e da cultura**, v. 9, n. 3, p. 1–20, 2007.

FRANCO, Sebastián Fernández; GRAÑA, Juan M.; RIKAP, Cecilia. Dependency in the Digital Age? The Experience of Mercado Libre in Latin America. **Development and Change**, v. 55, n. 3, p. 429–464, 2024.

GAWER, Annabelle. Digital platforms and ecosystems: remarks on the dominant organizational forms of the digital age. **Innovation, Organization & Management**, p. 1–15, 2021.

HELMOND, Anne. The Platformization of the Web: Making Web Data Platform Ready. **Social Media + Society**, v. 1, n. 2, p. 1–11, 2015.

KONTAREVA, Alina; KENNEY, Martin. National markets in a world of global platform giants: The persistence of Russian domestic competitors. **Policy & Internet**, v. 15, n. 3, p. 327–350, 2023.

KONTAREVA, Alina; KENNEY, Martin. Building national autonomy in a platform-dominated world: Russia state policy towards platforms. **SSRN**, *[S. l.]*, p. 1–27, 2024. DOI: 10.2139/ssrn.4776251.

LIMA, Bruno. **Google compra empresa brasileira de busca**. 2005. Disponível em: https://www1.folha.uol.com.br/fsp/dinheiro/fi2107200525.htm. Acesso em: 1 jan. 2025.

LYRA, Marcos Puccioni de Oliveira; MACHADO, Gabrielle Bastos e Silva; FONSECA, Joana Buarque Da. Ecossistemas de Plataformas Digitais no Varejo Brasileiro: questões para o antitruste. *Em*: ANAIS DO IX ENCONTRO NACIONAL DE ECONOMIA INDUSTRIAL (ENEI) 2025, Fortaleza, Brasil. **Anais** [...]. Fortaleza, Brasil: Even3, 2025. p. 1–17. DOI: 10.29327/anais-encontro-nacional-de-economia-industrial-enei.1239001. Disponível em: https://www.even3.com.br/anais/anais-encontro-nacional-de-economia-industrial-enei/1239001-ecossistemas-de-plataformas-digitais-no-varejo-brasileiro--questoes-para-o-antitruste.

MANSELL, Robin; STEINMUELLER, W. Edward. **Advanced introduction to platform economics**. Cheltenham: Edward Elgar, 2020.

MARTINS, Helena; BOLAÑO, César. Para uma crítica da economia política das plataformas digitais: **Contracampo**, v. 44, n. 1, p. 1–16, 2025.

MATTOS, Adriana. **Yahoo! compra site de busca Cadê?** 2002. Disponível em: https://www1.folha.uol.com.br/fsp/dinheiro/fi0901200220.htm. Acesso em: 1 jan. 2025.

MF. **Plataformas digitais: aspectos econômicos e concorrenciais e recomendações para aprimoramentos regulatórios no Brasil**. Brasília : Ministério da Fazenda (MF). Disponível em: https://www.gov.br/fazenda/pt-br/central-de-conteudo/publicacoes/relatorios/relatorio-plataformas-consolidado.pdf.

O'REGAN, Tom; LI, Luzhou. Recalibrating China in a Time of Platforms. *Em*: ATHIQUE, Adrian; BAULCH, Emma (org.). **Digital Transactions in Asia. Economic, Informational, and Social Exchanges**. New York: Routledge, 2019.

POELL, Thomas; NIEBORG, David; VAN DIJCK, José. Platformisation. **Internet Policy Review**, v. 8, n. 4, p. 1–13, 2019.

RIBEIRO, Leonardo Costa; SILVA, Victo; CHIARINI, Tulio. Mapping the platform economy: A Methodology for Identifying and Locating Digital Platform Companies Using NLP Techniques. **Quality & Quantity**, 2025.

RIKAP, Cecilia; LUNDVALL, Bengt-Åke. **The Digital Innovation Race. Conceptualizing the Emerging New World Order**. Cham: Palgrave MacMillan, 2021.

SANTOS, Marcelo Brito Dos. **Nova Maquina de Busca Nacional: TodoBR**. 1999. Disponível em: https://www.ime.usp.br/~is/ddt/mac5711-99/is-5711-99-archive/msg00004.html. Acesso em: 1 jan. 2025.

SETO, Kenzo Soares. Platform sub-imperialism. **Big Data & Society**, v. 11, n. 2, p. 1–5, 2024.

SILVA, Flávio Bastos Da; DUARTE, Paulo Afonso B. Brazil and China's Digital Silk Road: Opportunities, Risks, and Strategic Implications. **Global Policy**, v. 16, n. 4, p. 655–668, 2025.

SILVA, Victo; CHIARINI, Tulio. Estratégias de expansão e inovação em corporações digitais: o caso do iFood como Brazil Tech. *Em*: ANAIS DO X ENCONTRO NACIONAL DE ECONOMIA INDUSTRIAL E INOVAÇÃO 2026, Aracajú (Sergipe). **Anais** [...]. Aracajú (Sergipe): Associação Brasileira de Economia Industrial e Inovação (ABEIN), 2026. p. 1–20.

SILVA, Victo; CHIARINI, Tulio; RIBEIRO, Leonardo Costa. Understanding Brazil's Platform Economy: Trends and Regulatory Challenges. **Nova Economia**, v. 34, n. 1, p. 1–31, 2024.

SILVA, Victo José; CHIARINI, Tulio. **Dependências digitais: rastreando a origem do capital das empresas de plataforma em operação no Brasil**: Nota Técnica n. 141. Rio de Janeiro : Ipea.

SRNICEK, Nick. **Platform Capitalism**. Cambridge (UK): Polity Press, 2017.

STEINBERG, Marc; ZHANG, Lin; MUKHERJEE, Rahul. Platform capitalisms and platform cultures. **International Journal of Cultural Studies**, v. 28, n. 1, p. 21–29, 2025.

TOZI, Fábio. Da nuvem ao território nacional: uma periodização das empresas de transporte por aplicativo no Brasil. **GEOUSP Espaço e Tempo**, v. 24, n. 3, p. 487–507, 2020.

TOZI, Fábio. Ride-Hailing Corporations, Territorial Selectivity, and Urban Algorithmic Inequalities in Brazil. *Em*: VALE, Mário; FERREIRA, Daniela; RODRIGUES, Nuno (org.). **Geographies of the Platform Economy**. Cham: Springer, 2024. p. 33–48.

VALENTE, Jonas C. L.; GROHMANN, Rafael. Critical data studies with Latin America: Theorizing beyond data colonialism. **Big Data & Society**, v. 11, n. 1, p. 1–13, 2024.

VAN DOORN, Niels; MOS, Eva; BOSMA, Jelke. Actually Existing Platformization. **South Atlantic Quarterly**, v. 120, n. 4, p. 715–731, 2021.

Annex

Table 1 – General figures on internet and digital platform adoption in Brazil, 2014-2024

Years	Individuals					Businesses				
	Internet Users[1]					Internet Users				
	%	… that use social media platform (%)	… that purchased products/services online…			%	… that have a profile in social media platforms (%)	… that sold online…		
			%	… using OTT platforms (%)	… using marketplace platforms (%)			%	… using OTT platforms (%)	… using marketplace platforms (%)
2014	61	76	35	-	-	-	-	-	-	-
2015	66	77	39	-	-	98	51	21	-	-
2016	69	78	38	-	-	-	-	-	-	-
2017	74	77	35	-	-	98	70	22	-	-
2018	77	75	34	26	62	-	-	-	-	-
2019	80	76	39	-	-	98	78	57	42	14
2020	86	72	-	-	-	-	-	-	-	-
2021	86	81	46	-	-	98	87	73	78	23
2022	86	80	45	30	72	-	-	-	-	-
2023	89	80	50	-	-	99	89	70	78	20
2024	90	81	46	31	90	99	89	61	81	22

Source: Autors' own. Data sourced from Regional Center for Studies on the Development of the Information Society (*Centro Regional de Estudos para o Desenvolvimento da Sociedade da Informação* – Cetic), TIC Domicílios (Indivíduos) (Questions C1, C5, H2, and H9) and TIC Empresas (Questions B1, B13A, E2B, and E2C). Note (-) data not available. [1] The figure includes Internet users, mobile phone Internet users, and users of applications that require an Internet connection