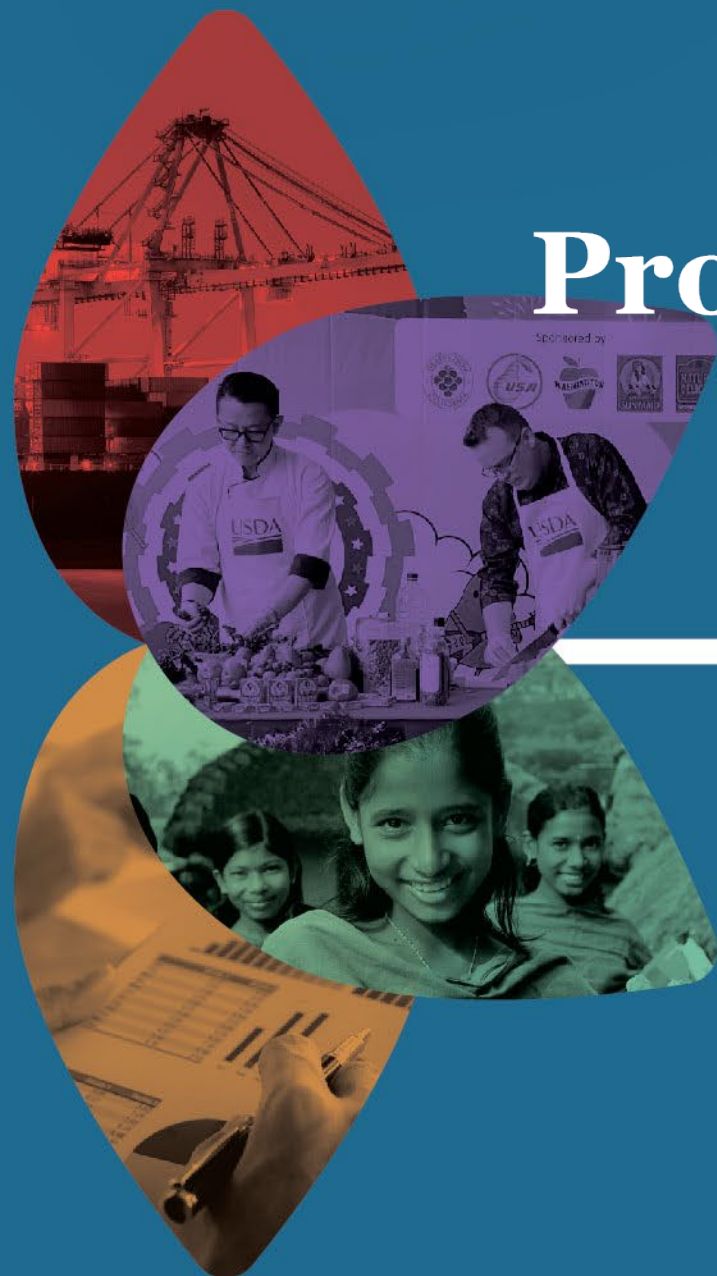




Spotlight on **Brazil**

# Regional Agricultural Promotion Program (RAPP)

Cooperator Program Division



# RAPP Summary

- Export market development program
- Encourages market diversification
- \$1.2 Billion
  - Multi-year funding
  - Multiple tranches
  - Tranche 1: \$300 million
- Application period closes February 2
- More details can be found on the FAS website:  
[fas.usda.gov/programs/regional-agricultural-promotion-program](https://fas.usda.gov/programs/regional-agricultural-promotion-program)



# RAPP Regulations

- Final Rule published November 17
  - Transformed ATP into RAPP
  - Eliminated requirement for tariff damage
  - Removed some application review language
  - Cost-Share: 10% (Generic) and 100% (Brand)
  - Set comment deadline of December 18
- Key Changes from ATP:
  - Domestic Admin from 6% up to 8%
  - Overseas Offices and Employee Expenses (Generic)



# Notice of Funding Opportunity (NOFO)

- NOFO published November 29
  - Notified public of \$300 million first tranche
  - Set application deadline of February 2
  - Projected a start date of June 1
  - Projected an end date of September 30, 2029
  - Detailed the review process
  - Named ineligible markets
  - Established emphasized regions
- Tranche 2 – anticipated announcement
  - Coincide with 2026 UES Cycle (March 2025)

# RAPP Ineligible Markets

To encourage market diversification, the following are ineligible for RAPP:

- China (including Hong Kong and Macau)
  - Canada
  - Mexico
  - European Union (EU27)
- 
- These four markets received more than half of U.S. ag exports in 2022
  - USDA-endorsed trade shows are eligible regardless of location



# Other Ineligible Markets

Due to sanctions or USDA policy, the following markets are also ineligible:

- Crimea region of Ukraine
- Cuba
- Iran
- North Korea
- Syria
- Belarus
- Russia

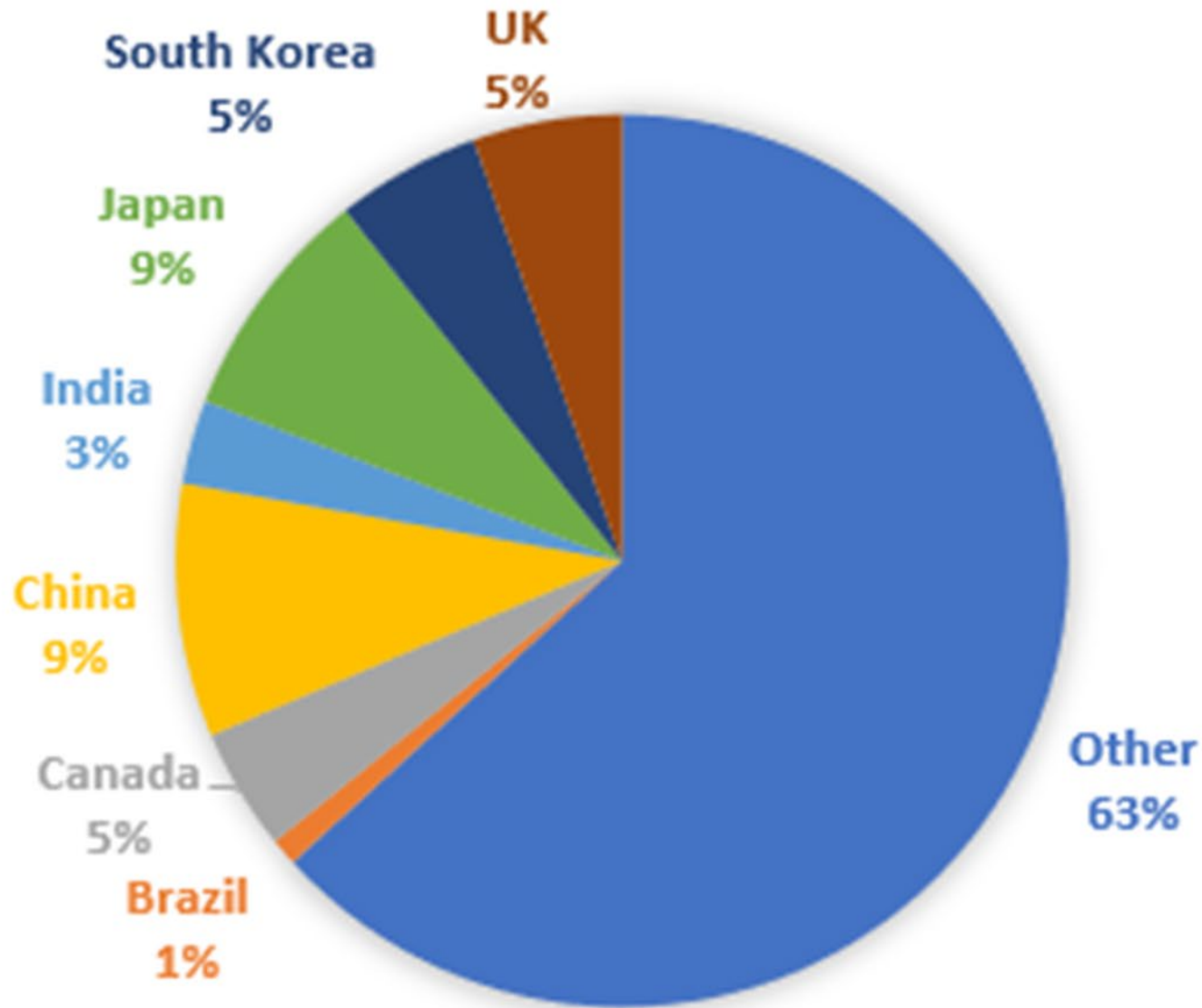


# Regions of Emphasis

Proposed activities in emphasized regions will receive preference:

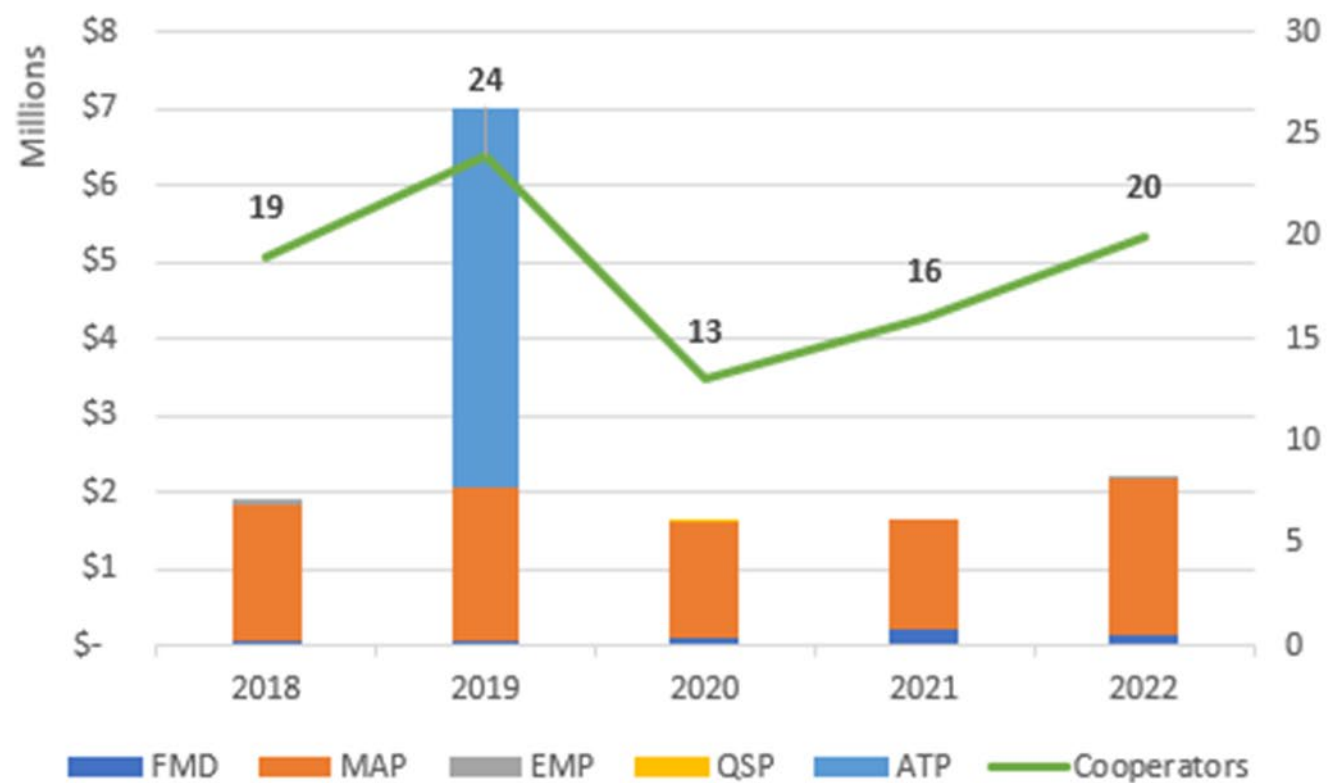
- Africa (\$25 million set aside)
  - Latin America and the Caribbean
  - South Asia and Southeast Asia
- 
- Activities proposed in regions/markets not listed as ineligible but not in an emphasized region are eligible. These fall under “All Other Regions/Markets.”

## Market Development Fund Expenditures by Country 2018-2022



- 1 percent of market development funds in the past 5 years have been spent in Brazil

# Brazil Market Promotion Funds



- Current ATP investment of \$4.9 million dollars in Brazil (Doubling investment of other programs)
- ATP funds may be used through September 30, 2024.
- 20 Cooperators active in Brazil utilizing multiple programs
- Anticipate RAPP funding request to equal or exceed ATP efforts



# Questions About RAPP

RAPP Specific Questions:  
[CoPDAdmin@usda.gov](mailto:CoPDAdmin@usda.gov)

RAPP Page on the FAS website:  
[fas.usda.gov/programs/regional-agricultural-promotion-program](https://fas.usda.gov/programs/regional-agricultural-promotion-program)



# Spotlight on Brazil

*Michael Conlon  
Agricultural Counselor  
U.S. Embassy, Brasilia*

# ATO



**Megan Francic**  
ATO Director



**Vandoir Silva**  
Agricultural Clerk



**Alexandre Vendemiatti**  
Agricultural Marketing Specialist

# OAA



**Michael Conlon**  
Agricultural Counselor



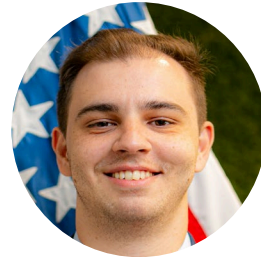
**Joseph Degreenia**  
Agricultural Attaché



**Nicole Podesta**  
Agricultural Attaché



**Camila Aquino**  
Agricultural Specialist



**Marcos Bento**  
Agricultural Specialist



**Carolina Castro**  
Agricultural Specialist



**Marcela Formiga**  
Agricultural Specialist



**Thiemi Hayashi**  
Agricultural Specialist



**Bruno Arruda**  
Agricultural Clerk



**Fabiola Reis**  
Budget Analyst



# KEY FACTS



**5<sup>th</sup>**

Largest  
country in the world  
in area

**10<sup>th</sup>**

Largest  
economy

**7<sup>th</sup>**

Largest population  
in the world

**3.1%**

Project GDP growth  
rate 2023

# Brazil Market

“

Largest market in Latin America with the food sector worth more than \$449 billion.

”



**\$135 BILLION**

Food Retail



**\$106 BILLION**

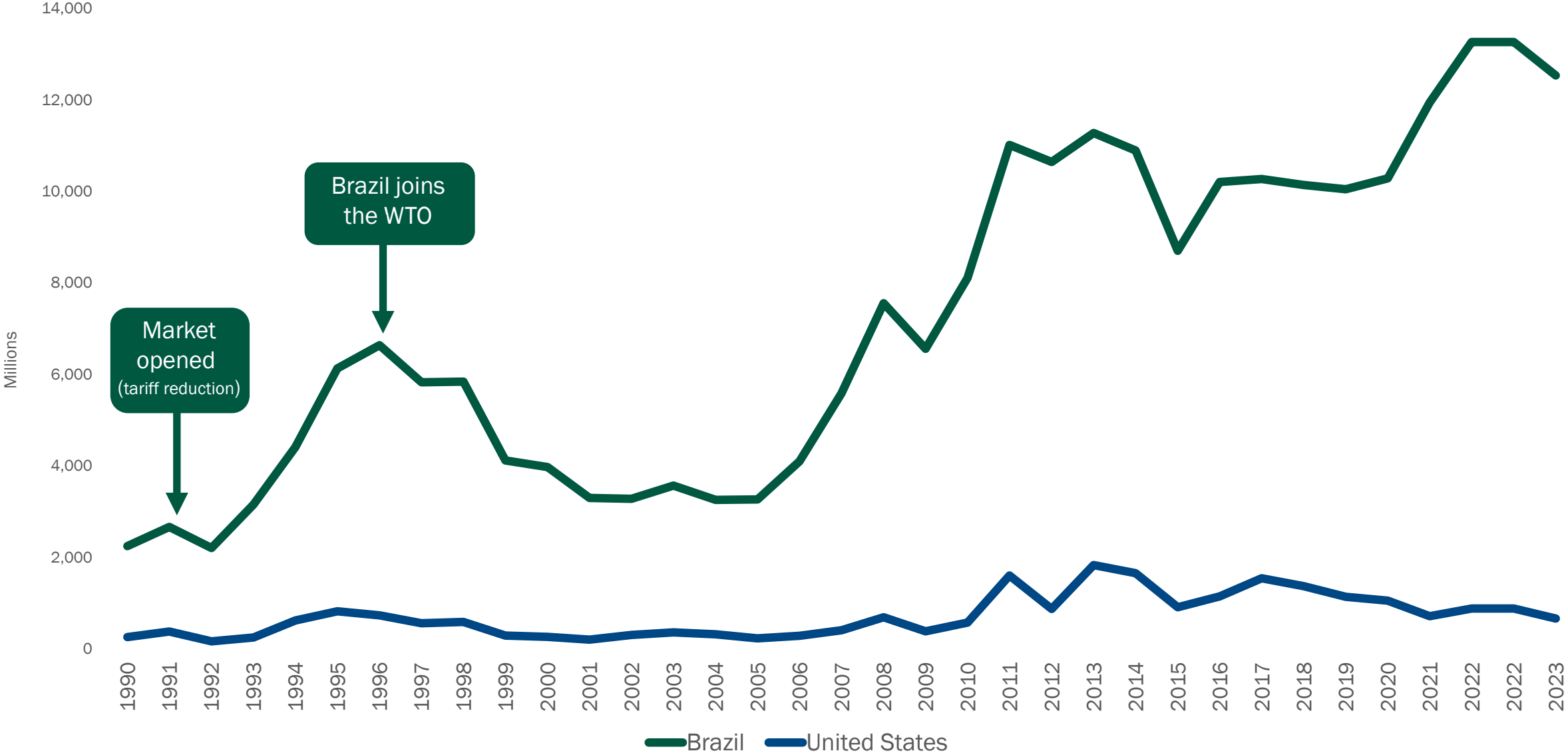
HRI Food Service



**\$208 BILLION**

Food Processing Industry

# Brazil's Agricultural Imports

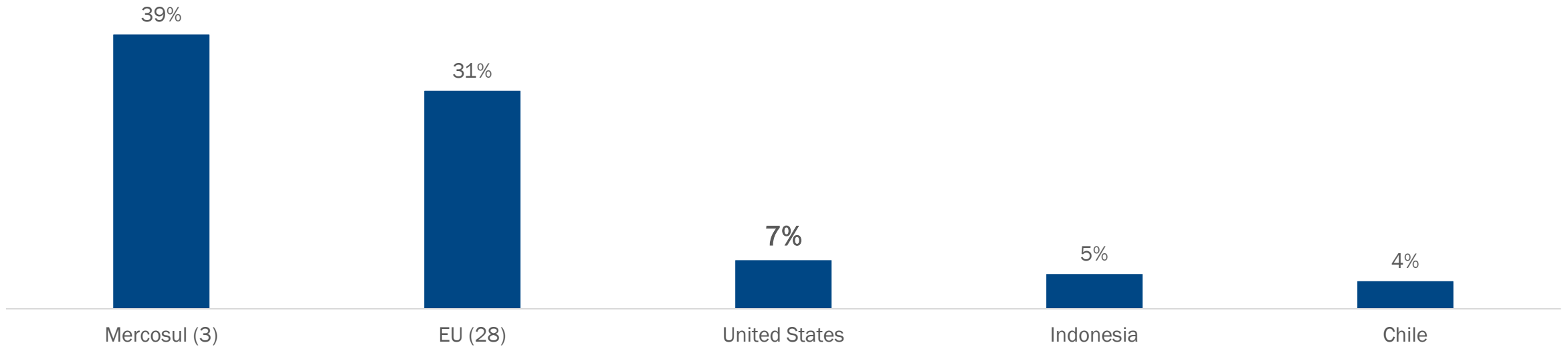


Source: TDM. 'Ag-related products'



# 7%

## U.S. Share of Brazil Ag Imports



# Products with **High** Potential



Cranberry



Tree Nuts



Dairy Ingredients



Hops



Spirits



Seafood



High-End Meat



Livestock Genetics

# COOPERATORS

WITH LOCAL REPRESENTATION





# Case Study: U.S. Hops



- ◆ Brazilian imports of U.S. hops increased almost **200%** from 2017 to 2022.
- ◆ **The United States is the second largest supplier of hops to Brazil**, with 33 percent market share.

# Upcoming Major Events in **Brazil**



200th Anniversary of U.S. – Brazil Relations



*Bicentennial Beer*



G20 in Brazil



2024





# USA Food Week 2024

---

- Anuga Brazil  
April 9-11
- Fertilize 4 Life Initiative  
April 10
- Indigenous Culinary Heritage Program  
April 9-13
- Cochran Program Celebration  
April 12



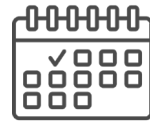


# Anuga Brazil

is USDA-endorsed



+ 13k qualified visitors



April 9-11, 2024

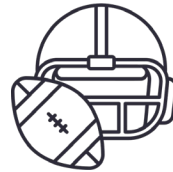
Great opportunity to promote new-to-market products with high-quality attendees

Booths are still available





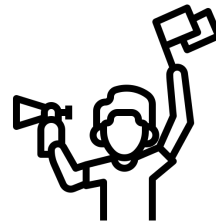
The first NFL game in **South America**



Regular season **NFL game in Sao Paulo** starting in 2024



**Strong** affinity for U.S. culture



Brazil has **38 million** NFL fans—second largest international fan base

# Upcoming ATO Activities



Cochran Program on  
Tree Nuts



Social Media Marketing



Major City Outreach



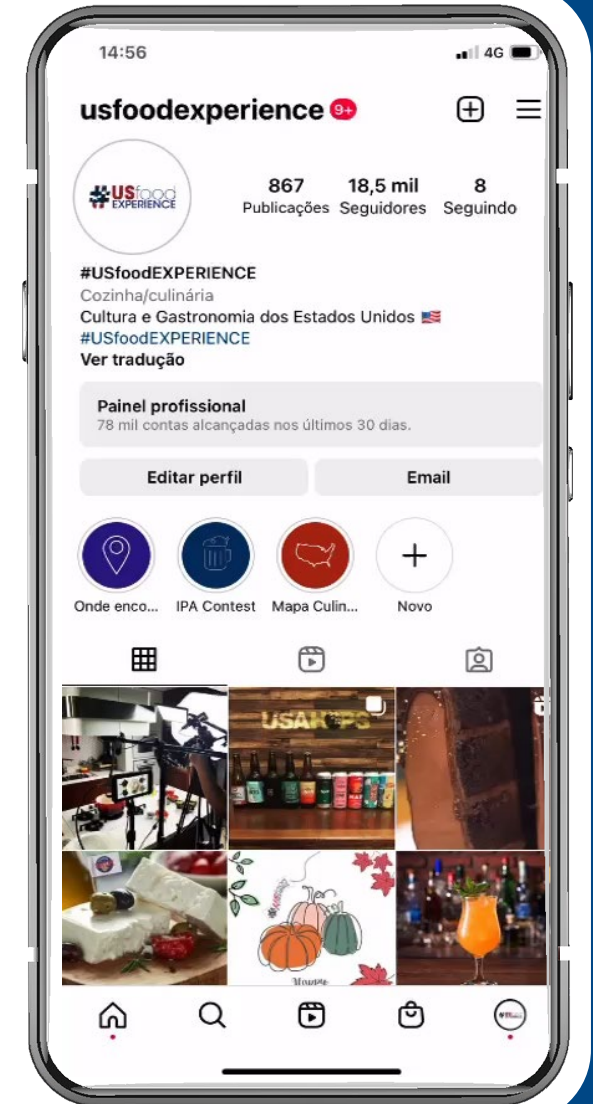
Culinary School Outreach



Reverse Trade Missions

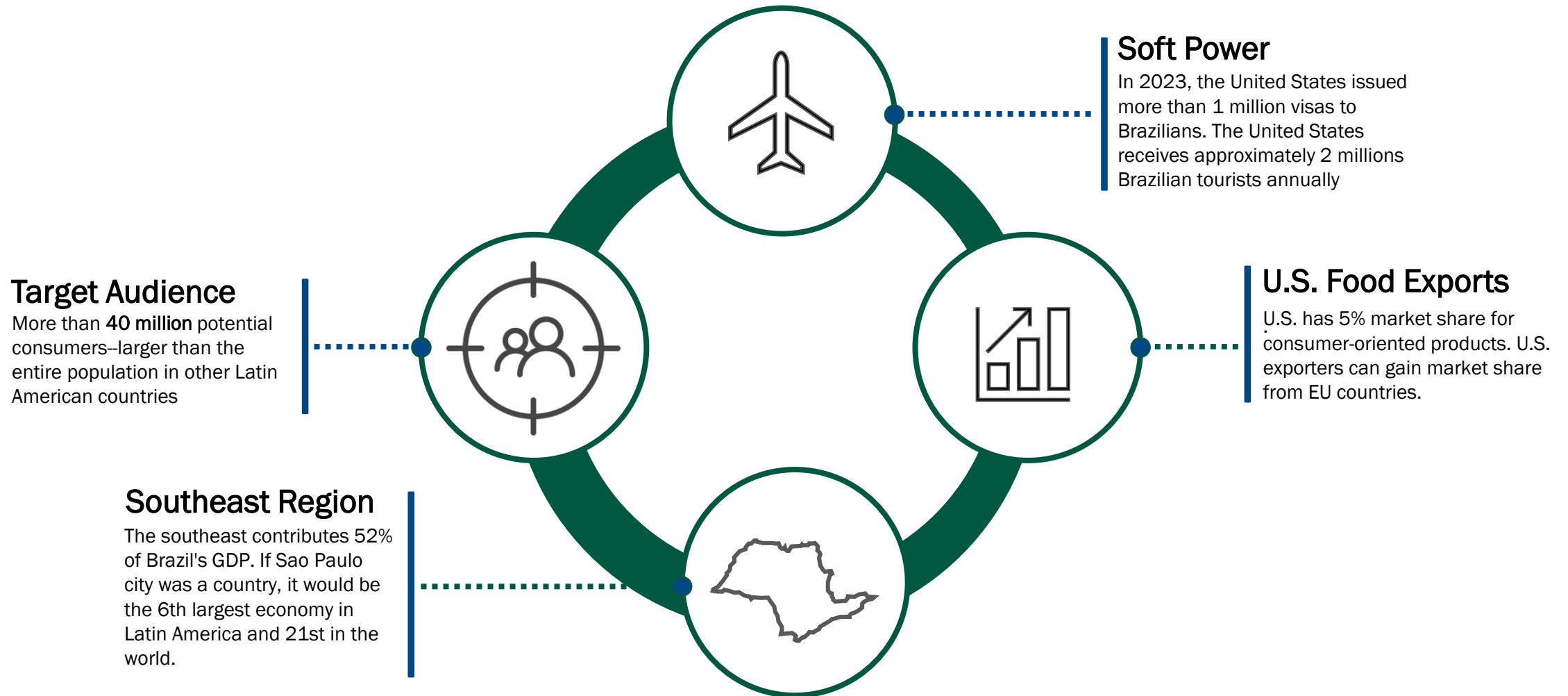


AmCham Collaboration





# OPPORTUNITIES TO EXPLORE



# Brazil Challenges

*for U.S. Food Exporters*



## Competition with Europe

While U.S. product prices are on par with EU products, Brazilian consumers perceive European products to be higher quality. European exporters are more flexible with small orders.



## Mercosul

Strong competition from Mercosul countries due to proximity and tariff-free access.



## World Leading Food Producer

Brazil is one of the largest agricultural producers and exporters. Second largest exporter of processed food globally.



## Price

U.S. products are sold at premium prices, limiting potential customers.



## “Custo Brasil”

Complex import procedures, high taxes, and heavy bureaucracy.

We Want to  
**Work**  
with  
**YOU**



# Thank You

## Obrigado!

ATOSaoPaulo@usda.gov







**Leonardo Silveira**  
**COO**



**Brazil on Cooperator's Perspective**  
**Business Opportunities**  
**Take Advantage of Brazil!**

# Tips & Tricks

- **Relationship is key!**
- Pace of Business is different
- Attention to import process
  - 1st import may require product registration
  - Analysis may be requested by batch/lot
  - 1st time is challenging – following exports are easier
- Importers know how to do it – follow instructions
- Consider the distributors
  - Take care of brand
- Products of the USA have good perception - trade and consumers
  - If activity is well planned, trade and consumers will hear your message

# The Retail in Numbers

Data as of  
2022

## SUPERMARKETS

+\$135 Billion  
Revenue

+28 Million  
visits/day

~95  
thousand  
stores

47% Cash &  
Carry Share

## RANKING



GRUPO  
CARREFOUR  
BRASIL

\$22 Billion



\$12.1 Billion



\$5 Billion



\$3.8 Billion



\$2.8 Billion



# Variety of products already in Brazil



# Ideas – Potential Activities for Brazil

- Advertising
- Awareness Campaigns
  - Consumers and Trade
  - Exporters
- Branded Promotion
- Buyers' Missions
- Digital Marketing
- Educational campaigns
  - Importers and/or Exporters
- In-Store Promotion
  - Retail Merchandising
  - Promotion/Tasting
- Market Access Reports
  - Feasibility Studies
- Partner Identification
- Product Demonstrations
- Public Relations
- Regulatory
  - Export Assistance/Education
  - Plant/Product Registration
- Rounds of Meetings
- Samples' Distribution
- Social Media
- Technical events
- Trade Shows
- Trade Missions

# **Cooperators' Activities**

**Some examples from 2023**





# Trade Shows



- **March 19<sup>th</sup> to 21<sup>st</sup>**
- Rio de Janeiro
- Food Service & Retail
- Exports\* | Local purchases

# Trade Shows



- **April 9<sup>th</sup> to 11<sup>th</sup>**
- São Paulo
- Food Service & Retail
- USA Pavilion
- Exports | Local purchases

# Trade Shows



- **May 13<sup>th</sup> to 16<sup>th</sup>**
- São Paulo
- Retail
- Exports\* | Local purchases



# Trade Shows



- **June 11<sup>th</sup> to 14<sup>th</sup>**
- São Paulo
- Food Service
- Local purchases

# Trade Shows



- **June 12<sup>th</sup> to 15<sup>th</sup>**
- São Paulo
- Natural & Healthy
- Local purchases

# Trade Shows



- **August 6<sup>th</sup> to 8<sup>th</sup>**
- São Paulo
- Food Ingredients
- Exports | Local purchases

# Trade Shows



- **August 6<sup>th</sup> to 8<sup>th</sup>**
- Biennial trade show
- São Paulo
- Animal Protein Feed (former Poultry & Swine)
- Exports\* | Local purchases



# Trade Shows



- **August 7<sup>th</sup> to 8<sup>th</sup>**
- São Paulo
- Fresh Produce
- Exports | Local purchases

# Trade Shows



- **August 14<sup>th</sup> to 16<sup>th</sup>**
- São Paulo
- Pet Food
- Exports\* | Local purchases

# Trade Shows



- **October 22<sup>nd</sup> to 24<sup>th</sup>**
- São Paulo
- Seafood
- Exports | Local purchases

# Trade Shows



- **September 16<sup>th</sup> to 18<sup>th</sup>, 2025**
- Biennial trade show
- São Paulo
- Animal Feed
- Exports | Local purchases



# Success Stories

## Alaska Seafood Marketing Institute (ASMI) in Brazil

- Since 2011 in Brazil | Exports close to zero in the beginning
  - From 31 MT/year to over 2,300 MT/year
- 15+ vendors developed (calling out) | 1.2 mi.+ pot. consumers
- Strategy included:
  - Education to exporters of Alaska Seafood
  - Market access activities & Regulatory support
  - Trade development
    - Importers, processors, retailers and food service operators
  - Trade Missions & Buyers Missions to support AK Seafoods expansion
  - Multiple trade shows
  - Trainings, seminars and workshops
  - Retail and foodservice promotions
- Currently, Alaska Seafood can be found in more than 400 PoS Countrywide
- Over \$40 million USD in direct exports



# Success Stories

## Kizable, LLC

- From Florida | Brand: Kyzandy
- Participated in SUSTA's Trade Mission to Brazil
  - Around Anufood, currently named Anuga Select Brazil
  - Joined USA Pavilion, managed by USDA/FAS/ATO São Paulo
- Strategy included:
  - Education to exporters on Market briefing offered by ATO
  - Retail Tour
  - Pre-scheduled one-on-one meetings
  - Dedicated interpreters
  - On-site assistance
  - Follow-up assistance after the trade show
- Exporting container loads to Brazil and growing every day
- Returning in 2024 to Anuga Select Brazil with SUSTA



# Thank You!

LEONARDO SILVEIRA  
**lsilveira@riverglobal.net**



# Questions & Answers

**Moderator:** Kristi Schammel, USDA

**Panelists:** Mayra Caldera, USDA Global Program

Megan Francic, ATO

Leonardo Silveira, River Global