

# Strategic Agenda for Brazilian Agroindustry

EXECUTIVE VERSION



BRAZILIAN AGRIBUSINESS  
ASSOCIATION

The world is going through a period of profound geopolitical, economic and technological transformations that are reshaping relations among nations, redefining strategic dependencies and increasing the importance of food, energy and productive security.

**For Brazil, this scenario poses the challenge of resuming a growth trajectory compatible with its potential and strengthening its competitive position in a new global economy.**

Over the past decades, the Brazilian agroindustry has built capabilities that have become an immense strategic asset for the country. Mastery of tropical agriculture, advances in science and technology, continuous productivity gains and the sector's strong entrepreneurial spirit have been decisive in bringing us to where we are today. Moving forward, however, requires a long-term vision and State Policies to sustain this progress and contribute to a new stage of Brazilian development.

It is in this context that ABAG presents this Strategic Agenda, positioning the Brazilian agroindustry as an important part of the solutions to the country's challenges and identifying the public policies needed for its potential to translate fully into competitiveness and prosperity.

# The Entrepreneurial Brazil WE NEED TO BECOME

The 21st century ushers in a new stage of competition among nations. The prosperity of countries will increasingly depend on their ability to transform resources and potential into competitive advantages, which requires strong institutions, support for entrepreneurship, knowledge, technology, investment mobilization and long-term strategies.

Brazil has exceptional conditions to build this future. Its territorial scale, wealth of natural resources, diversity of biomes, renewable energy matrix and vocation for generating knowledge, entrepreneurship and innovation place the country in a unique position to promote social inclusion and sustainability and to play a leading role in the energy transition and the bioeconomy, two of the main agendas of the global economy.

However, realizing this potential requires overcoming structural challenges such as regulatory complexity, legal uncertainty, low administrative efficiency, institutional fragmentation, infrastructure deficiencies and the high cost of capital.

***A country's development takes place when it creates opportunities, improves people's quality of life and expands the prospects for the future of its population.***

Overcoming these challenges requires a long-term vision and public policies capable of providing continuity and direction to national development. These are commitments that transcend governments, electoral cycles and economic sectors in order to create conditions in which entrepreneurship, investment and innovation can turn Brazil's potential into shared prosperity.

# The agroindustry as a strategic platform for national development

Among the many assets capable of driving Brazilian development in the coming decades, few have such broad relevance as the agroindustry. Comprising cooperatives, small, medium-sized and large companies, research and study institutions, service providers and millions of rural producers, it is present in every Brazilian state, forming one of the country's largest productive ecosystems.

***Creating opportunities, feeding people, generating energy, producing bioinputs and developing territories are among the agroindustry's most important contributions to the country.***

This trajectory is the result of decades of investment in science, technology, entrepreneurship and cooperation between the public and private sectors, which have enabled Brazil to develop a globally recognized tropical agriculture and consolidate the agroindustry as one of the pillars of the national economy.

The integration of agriculture and industry, and of industry and agriculture, is a defining feature of Brazilian agriculture, capable of producing up to three crops per year and structured around highly productive and integrated just-in-time supply chains. This efficiency, however, also makes it sensitive to climate change, geopolitical crises and supply risks.

In this environment, modern entrepreneurship, combined with a favorable business environment and an efficient state, is essential to preserve efficiency and strengthen the response capacity of productive chains in a scenario of growing complexity and uncertainty. These conditions must reach small, medium-sized and large producers and companies in all regions of the country, expanding opportunities, progress and well-being. Brazil already offers concrete examples of this potential.

# The challenge of Brazilian competitiveness

## THE HORIZON FOR THE COMING DECADES IS CLEAR.

It will not be enough to produce more. It will be necessary to produce better, incorporate technology, strengthen national capabilities and expand Brazil's presence in international markets with greater value added.

In a scenario marked by accelerating technological change and new environmental requirements, competitiveness no longer depends solely on the efficiency of companies. It also results from the quality of the environment in which they produce, invest and innovate.

***Competitiveness is not an end in itself.  
It is a condition for the agroindustry to continue creating  
opportunities, developing territories and contributing to a more  
prosperous Brazil.***

Strong institutions, legal certainty, efficient regulation, science, technology, infrastructure, logistics, financing, energy, people development and international integration are essential factors for sustaining the competitiveness of the Brazilian agroindustry over the long term.

## A shared vision FOR A STATE POLICY

The challenges demonstrate that the advancement of the Brazilian agroindustry will not be achieved through isolated initiatives. The complexity of markets, technologies and public policies requires a shared vision capable of integrating priorities, aligning efforts and guiding coordinated action by government, the productive sector, the scientific community and representative organizations.

This vision recognizes that, although they operate in different segments, the various productive chains share the same institutional environment, depend on common structural conditions and face converging challenges. Improving these conditions is of interest not only to the agroindustry, but to Brazil's future.

With this purpose, the Brazilian Agribusiness Association (ABAG) brought together representatives from different segments to build this Strategic Agenda. The result is a proposal that respects the sector's diversity and entrepreneurial drive, identifies converging priorities and organizes a common long-term vision so that the Brazilian agroindustry can fully realize its potential.

***More than a collection of priorities and recommendations, this Agenda provides a reference for building State Policies focused on the essential conditions needed to sustain the competitiveness of the agroindustry and contribute to Brazil's development.***

As an expression of this vision, the following section presents a message to the next President of the Republic, highlighting five structural public policies considered priorities for the Brazilian agroindustry.

# MESSAGE TO THE NEXT President of the Republic

Brazil's development depends on building an environment in which entrepreneurship, investment, innovation and work can flourish with security, predictability and confidence.

It is the State's responsibility to ensure institutional conditions so that companies, producers, cooperatives, researchers and workers can fully develop their potential. A more dynamic and competitive economy increases investment, creates formal jobs, strengthens public revenues and creates conditions for the country's economic and social progress.

Preparing Brazil for the challenges of the coming decades requires consistent public policies, a long-term strategic vision and the strengthening of national capabilities that underpin its competitiveness and expand its ability to play a leading role on the global stage. With this purpose, this Strategic Agenda brings together a broad set of proposals.

Among them, five structural public policies stand out. They should be treated as permanent policies and given priority from the first months of the next government. They are the foundations of a national strategy to strengthen the competitiveness of the agroindustry and contribute to a more prosperous Brazil with a stronger global role. These policies do not exhaust the Agenda. They nevertheless represent State capabilities to support and drive the pillars, proposals and initiatives presented.

## **1 NATIONAL POLICY FOR FINANCING, RURAL INSURANCE AND CLIMATE RESILIENCE OF THE AGROINDUSTRY**

Establish a multi-year financing framework, coordinating public and private agents and instruments to expand the mobilization of resources for the productive sector, with predictability and medium-term planning. Modernize and expand access to credit and financial instruments for investment and working capital, strengthen rural insurance as a permanent risk-management policy, and establish a National Climate Catastrophe Fund, increasing the agroindustry's resilience to extreme climate events.

## **2 INDUSTRIAL POLICY TO STRENGTHEN STRATEGIC CHAINS OF THE BRAZILIAN AGROINDUSTRY**

Structure a national policy that strengthens national productive capabilities and stimulates the production of strategic inputs, machinery, equipment and technologies essential to the competitiveness of the agroindustry. This policy should ensure more balanced conditions of competition for industry established in Brazil vis-à-vis imported products, promote greater agility and predictability in the assessment and approval of new technologies, eliminate the accumulated regulatory backlog that currently compromises access to innovation, and strengthen intellectual property protection, ensuring the investments needed in research, development and innovation focused on tropical agriculture.

### **3 NATIONAL POLICY FOR GOVERNANCE, PLANNING AND FINANCING OF AGROINDUSTRIAL INFRASTRUCTURE**

Establish a permanent model of governance, planning and financing capable of coordinating public and private investments in multimodal logistics, storage, energy and digital connectivity, reducing structural bottlenecks and increasing the competitiveness of productive chains. The policy should promote the modernization and harmonization of licensing and authorization processes for essential projects, with greater coordination among federal entities and competent authorities, ensuring decisions based on technical criteria, greater predictability, legal certainty and speed, without compromising environmental and social protection.

### **4 NATIONAL POLICY FOR COMMUNICATION, EDUCATION AND APPRECIATION OF THE AGROINDUSTRY**

Strengthen permanent initiatives in institutional communication, education and engagement with society, increasing understanding of the agroindustry's contribution to food security, sustainability, innovation and the country's development.

### **5 NATIONAL POLICY FOR INTERNATIONAL INTEGRATION AND DEFENSE OF BRAZILIAN COMPETITIVENESS**

Structure a permanent public policy for international integration, trade defense and international cooperation, expanding market access, addressing tariff and non-tariff barriers and strengthening Brazil's leadership in global agendas. The policy should promote coordinated action among government, academia, scientific institutions and the productive sector through permanent intelligence and technical-scientific defense structures focused on defending Brazilian interests in the main international forums.

# **Strategic Agenda for the Brazilian Agroindustry Architecture of the Document**

The Agenda organizes an integrated vision of the capabilities Brazil needs to strengthen in order to increase the competitiveness of the agroindustry over the coming decades.

More than a set of sectoral proposals, it constitutes a long-term strategy to strengthen the business environment, expand national productive capabilities and consolidate Brazil's leadership in the sustainable production of food, fibers, bioenergy, biomaterials and other bio-based solutions.

To organize this vision clearly, in an integrated and easy-to-understand way, the Agenda was structured around three strategic dimensions, seven pillars and twenty-three structuring topics.

The three strategic dimensions constitute the Agenda's main organizational axes. They group the different factors that condition the competitiveness of the Brazilian agroindustry and guide how the challenges and proposals were organized throughout the document.

Each dimension is composed of strategic pillars, which represent the main national capabilities to be strengthened in order to increase the competitiveness of the Brazilian agroindustry. They range from the regulatory and institutional environment to science, technology and innovation, infrastructure, financing, people development and international integration.

## Prioritization Horizon

Each pillar brings together structuring topics that translate the main challenges and priorities identified in each thematic area. To facilitate reading and ensure consistency throughout the document, all topics follow the same structure: strategic objective, context, challenges and initiatives.

|                       |               |                                                                                                                                                                           |
|-----------------------|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>SHORT</b>          | UP TO 2 YEARS | Topics that require immediate mobilization by the State and should receive maximum priority on the public agenda.                                                         |
| <b>SHORT / MEDIUM</b> | 2 TO 4 YEARS  | Topics that, although also strategic, can progress gradually without losing priority on the national agenda.                                                              |
| <b>MEDIUM</b>         | 4 TO 6 YEARS  | Structuring topics whose development requires continued planning and the gradual strengthening of national capabilities.                                                  |
| <b>MEDIUM / LONG</b>  | 6 TO 10 YEARS | Permanent topics of the national strategy that require continuity and continuous improvement to consolidate capabilities that are essential to the country's development. |

# Agenda

## ARCHITECTURE

### **BUSINESS ENVIRONMENT**

Institutional and legal conditions to undertake, invest and innovate

#### **PILLAR 1. Regulatory and Institutional Environment** [SHORT TERM]

- Modernization of the Regulatory Environment
- Legal Certainty and Institutional Coordination
- Public Governance and State Capabilities
- Modernization of Licensing and Administrative Efficiency

### **STRATEGIC CAPABILITIES FOR AGROINDUSTRIAL PRODUCTION**

National foundations to innovate, produce and compete

#### **PILLAR 2. Science, Technology, Innovation and Productive Transformation** [MEDIUM / LONG TERM]

- Strengthening and Modernization of the Science, Technology and Innovation System for Tropical Agriculture
- Technological Transformation of the Agroindustry
- Strategic Data and Intelligence Governance for the Agroindustry

#### **PILLAR 3. Strategic Inputs and National Productive Capabilities** [SHORT TERM]

- Strengthening Strategic Input Security
- Strengthening National Productive Capabilities
- Technological Development of Strategic Inputs

#### **PILLAR 4. Physical, Logistics and Digital Infrastructure** [SHORT / MEDIUM TERM]

- Modernization of Logistics Infrastructure and Storage
- Energy and Water Infrastructure and Territorial Resilience
- Universal Connectivity and Digital Infrastructure for the Agroindustry
- Governance, Planning and Infrastructure Financing

#### **PILLAR 5. Insurance, Credit and Financial Instruments** [SHORT TERM]

- Modernization of the Financial System
- Rural Insurance and Risk Management
- Financial Instruments for Innovation and Sustainability

## **NATIONAL LEGITIMACY AND INTERNATIONAL LEADERSHIP**

National recognition and international leadership

### **PILLAR 6. Information, Training and Public Perception [MEDIUM TERM]**

- Communication and Legitimacy
- People and Leadership Development
- Knowledge Dissemination and Digital Inclusion

### **PILLAR 7. International Leadership and Global Competitiveness [SHORT TERM]**

- International Market Integration
- Global Governance of Tropical Agriculture
- Food Security, Bioeconomy and Energy Transition

## **The Brazilian agroindustry enters the coming decades facing a historic opportunity**

Few countries simultaneously possess the territorial base, scientific capabilities, business expertise, productive diversity, environmental wealth and accumulated experience in tropical agriculture that Brazil has built.

These advantages give the country unique conditions to lead a new stage of global development based on the sustainable production of food, fibers, bioenergy, biomaterials and solutions for a low-carbon economy.

This leadership will depend on Brazil's ability to build more efficient institutions, improve its regulatory environment, expand investment in science, technology and innovation, strengthen its productive base, modernize infrastructure, develop financial instruments, train people and leaders, and assume a growing leadership role in shaping the rules that will guide agriculture, sustainability and international trade.

The seven pillars of the Agenda collectively translate these foundations into a national strategy. More than sectoral proposals, they represent an integrated vision of development for the Brazilian agroindustry, based on the understanding that competitiveness, innovation, sustainability and international integration are inseparable dimensions of the same project for the future.

This executive version summarizes the main elements of this strategy and presents the paths for Brazil to transform its competitive advantages into permanent assets, consolidate its leadership in tropical agriculture and expand the agroindustry's contribution to the country's economic, social, technological and environmental development.

**Access the full document (in Portuguese) and see how the Strategic Agenda for the Brazilian Agroindustry is structured**

