

THE DIVERSIFICATION OF BRAZIL'S DEFENCE PARTNERSHIPS BETWEEN 2023 AND 2025

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This article seeks to identify the Brazilian government's initiatives to diversify defence partnerships between 2023 and 2025 (Lula's third term). It begins with an overview of the agreements concluded in previous years to provide a brief context. The focus of this study is to identify, in official sources and in specialised press, agreements in the sector that took place during the aforementioned period, even where the commercial deal has no immediate impact on Brazilian foreign policy. Particular emphasis is given to the failed attempt to secure a Chinese partner for Avibras in 2024. Furthermore, this study catalogues and links these initiatives to the much-publicised efforts to revitalise the defence industry and to the drive to diversify suppliers and technological partners.

Brazil is developing various defence partnership projects with nations across all continents. The activities resulting from the implementation of these agreements are carried out directly by each branch of the Armed Forces – given the distinct decision-making autonomy each branch wields in procurement of weapons systems – but also by the Ministries of Defence and Foreign Affairs, the latter acting through the Brazilian Cooperation Agency (*Agência Brasileira de Cooperação*, ABC).

Notable among the defence cooperation initiatives are the following projects: the training of the Namibian Navy; the Brazilian Aeronautical Technical Mission (*Missão Técnica Aeronáutica Brasileira*, MTAB) in Paraguay, which has been running since 1982; the agreement with Cape Verde, which includes a Brazilian naval mission in that country; the donation of uniforms to the Cape Verdean Coastguard and the conduct of joint exercises; and partnerships with neighbouring Argentina, covering the cyber defence sector,

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support for the Brazilian operation in Antarctica and participation in the Embraer KC-390 Millennium transport aircraft project (Brasil 2024a).

In addition to these better-known agreements, Brazil has also sought partners further afield from its strategic neighbourhood. For example, the Brazilian Air Force began negotiations with Ukraine in 2003 to launch the Cyclone-4 rocket, an unsuccessful project that was eventually terminated in 2015 (Almeida Filho 2025, 287–301). Brazil acquired 12 MI-35 attack helicopters from Russia, which have since been decommissioned and resold, and also considered the acquisition of air defence systems from that country (Padilha 2017). It is worth mentioning the partnership with the so-called Visegrád Group (Hungary, Poland, the Czech Republic and Slovakia), which covers Chemical, Biological, Radiological and Nuclear Defence (CBRN), cyber defence and includes the Czech Republic's participation in the development of the KC-390 Millennium transport aircraft. The latest development is the rapprochement for the establishment of closer ties with Poland.

Poland. In December 2025, Embraer signed a memorandum of understanding with the Polish state-owned company PGZ (Polska Grupa Zbrojeniowa S.A.) for industrial cooperation involving the transfer of technology relating to the KC-390 Millennium aircraft (Cardoso 2025). Poland's interest in this aircraft must be understood in the context of the Russian occupation of Crimea since 2014. Since 2022, when Russian troops reached areas near Kyiv, the North Atlantic Treaty Organisation (NATO) has been pressing for increased defence spending among its member states. The adoption of standardisation and the sharing of reliable suppliers are some of the hallmarks of the transatlantic alliance. In this regard, it is worth noting that Portugal, also a NATO member, is the largest international partner in the KC-390 Millennium aircraft development programme.

Portugal. In October 2023, the first of the five KC-390 Millennium aircraft contracted by the Portuguese Air Force in 2019 entered service. In Europe, in addition to Portugal and Poland, Hungary has had a KC-390 Millennium aircraft in service since 2024. Also, within the NATO framework, it is worth noting that the Netherlands, Austria and the Czech Republic have already expressed an interest in operating the Brazilian aircraft (Embraer 2023). This means there is potential to provide services arising from its use, including maintenance, training, the supply of parts and systems, and new acquisitions.

The Portuguese case illustrates this well and demonstrates the internationalisation of strategic Brazilian companies, which has been encouraged under the governments of the Workers' Party (*Partido dos Trabalhadores*, PT). Embraer won the tender for the privatisation of the

Portuguese state-owned company OGMA in 2004 (Lula's first term), first becoming a shareholder and then the controlling shareholder in 2012 (Dilma's government). In Embraer's case, although the Brazilian government privatised the company, it still retains the power to veto foreign control over the company's management (golden share), a provision the Bolsonaro government attempted to overturn to allow its acquisition by the US firm Boeing.

The tests carried out by OGMA to prepare the KC-390 Millennium aircraft for entry into service have helped to build the capacity of the Portuguese aerospace industry. In this regard, the April 2023 agreement enabled OGMA to produce a NATO-standard version of the A-29 Super Tucano aircraft, which is already in use by 16 countries (TV Brasil 2023). In addition to President Lula, the signing ceremony was also attended by the then Portuguese Prime Minister António Costa, who currently chairs the European Council and, as such, wields some influence over the European Union's decisions on security and foreign policy. Furthermore, in 2025, the Portuguese government contracted the purchase of a sixth aircraft and expressed interest in acquiring up to ten additional KC-390 Millennium aircraft to offer to other countries, notably NATO members, under a business model to be brokered by the Portuguese (Força Aérea Portuguesa 2025).

This successful partnership with Portugal is an example of how diplomatic relations can lead to synergy within the defence industry and institutions. Portugal represents an opportunity for Embraer to expand into the buoyant NATO market. Furthermore, this partnership enables the Brazilian Air Force to find in Portugal a reliable logistics hub for transatlantic air operations, which has proved vital from vaccine transport operations during the COVID-19 pandemic to, more recently, the repatriation of Brazilian nationals. Portugal's strategic location was evident, for example, in October 2024, when the Brazilian Air Force managed to evacuate 1,105 Brazilians from the conflict zone in Lebanon in just eight days, thanks to the possibility of refuelling in Lisbon (Agência Força Aérea 2024).

Although Brazil's efforts to diversify its defence trade relations are clear – including initiatives aimed at self-sufficiency – the country generally remains dependent on the supply of military equipment and weapons systems from NATO members. This is the case, for example, with the procurement of frigates, submarines and combat aircraft. The Tamandaré-class Frigate Programme, launched in 2017 and currently in full development, is led by the German company Thyssenkrupp Marine Systems (tkMS).

The submarine modernization programme, for instance, is being carried out in partnership with the French firm Naval Group and, with the

technology transfer, includes construction in Brazil. And the fighter aircraft modernisation programme, which has been under development since 2015 and aims to replace the US-made F-5s with F-39 Gripen aircraft, is being carried out in partnership with the Swedish firm Saab — with the caveat that Sweden only became a member of NATO in 2024. Despite this reliance on NATO member states, the mentioned programmes share the common feature of technology transfer to the Brazilian Armed Forces and Brazilian companies (Campos 2026).

Such partnerships stem from Brazil's interest in collaborating with highly skilled defence industries, such as those found in France, Germany and Sweden. This rapprochement with these countries could enable the Brazilian defence industry to supply NATO countries, whose defence spending has been rising, notably following the Russian siege of Kyiv in 2022. Furthermore, NATO members, bowing to pressure from Trump, have agreed to increase spending on security and defence by 2025 to 1.5 per cent and 3.5 per cent of gross domestic product, respectively, by 2035 (NATO 2025). This could open up a market for Brazilian products and services. The following section outlines partnerships with non-NATO countries between 2023 and 2025.

United Arab Emirates. The most significant agreement to diversify defence partnerships was signed in 2023 with the EDGE Group. Founded in 2019, EDGE is a conglomerate of companies controlled by the government of the United Arab Emirates, which has a strategy of strong expansion in the global defence market. In April of that year, the Brazilian Navy and the EDGE Group signed an agreement to accelerate the development of the National Surface-to-Surface Anti-Ship Missile (*Míssil Antinavio Nacional de Superfície*, MANSUP). The significance of the agreement stems from the future industrial-scale production of this missile, which will equip the four new Tamandaré-class frigates (Agência Marinha de Notícias 2023). That same month, the EDGE Group opened an office in Brasília and, since then, has been acquiring Brazilian companies and announcing investments in Brazil totalling US\$3 billion (CNN Brasil 2026).

Also in 2023, EDGE acquired a 50 per cent stake in SIATT (formerly Mectron), a Brazilian company specialised in the production of anti-ship missiles, which is based in São José dos Campos. This deal enabled EDGE not only to gain access to the technologies developed for the MANSUP by Brazilian engineers – a missile that could be exported to Africa, South-East Asia and Latin America – but also to establish a reliable supplier of missiles for its parent company. An example of this was EDGE brokering a US\$300 million deal for SIATT missiles to the government of the United Arab Emirates in 2024, which enabled that Brazilian company to export for the

first time (Poder Naval 2024; EDGE Group 2025).

Still in 2024, EDGE acquired a controlling stake in Condor, a manufacturer of non-lethal weapons with customers in over 80 countries (Infomoney 2026). Since then, the Abu Dhabi-based company has expressed interest in developing radar systems in Brazil in partnership with the Spanish firm Indra, as well as cyber defence solutions for the Brazilian Navy (AeroIn 2026; EDGE Group 2026). It is important to emphasise that interest in Brazil stems not only from its specialist engineers, its existing industrial capacity and the availability of raw materials, but also from the fact that the country combines all these factors in a region far removed from armed conflicts, given the serious consequences of a blockade in the Middle East, as seen in the current conflict between the US and Israel on one side and Iran on the other.

Benin. In 2023, Brazil and Benin signed an international cooperation treaty, which was approved by the Senate in December 2025. The agreement provides for joint military education and training projects, the conduct of joint exercises, the exchange of strategic information, and cooperation regarding defence materials, equipment and services. The agreement also includes the exchange of methods and procedures used in security and defence operations, particularly in international peacekeeping missions, as well as the sharing of knowledge in science and technology (Senate Agency 2025).

Saudi Arabia. In 2024, the Vice-President and Minister of Development, Industry, Trade and Services, Geraldo Alckmin, and the Saudi Arabian Minister of Defence, Prince Khalid bin Salman, signed a defence cooperation agreement in Riyadh. The partnership provides for cooperation in 11 strategic areas: the defence industry (mission 6 of the *Nova Indústria Brasil*, 'New Industry Brazil' plan); the exchange of information; technology transfer; the financing of military systems; joint military training; the purchase and sale of equipment; research, development and studies on defence projects; emergency and crisis management; military health services; and logistical support. This agreement updates and strengthens the commitment established by the 1984 Protocol on Industrial-Military Cooperation between Brazil and Saudi Arabia. The new agreement will be valid for five years, renewable for the same period, and provides for the establishment of a Joint Military Committee, to be led by the defence ministers of both countries (Brazil 2024b).

India. In October 2025, Vice-President Geraldo Alckmin and Defence Minister José Múcio met with the Indian Defence Minister, Rajnath Singh, in New Delhi. This high-level meeting had been preceded by the first edition of the Brazil–India Political–Military Dialogue (2+2 Mechanism), which had also taken place in the Indian capital in 2024 (the second edition took place in Brasília in 2025). These initiatives give concrete form to the decision by

President Lula and the Indian Prime Minister, Narendra Modi, to deepen cooperation in this sector. As a result, commanders of the Armed Forces of both countries have established arrangements for cooperation in military training and the maintenance of the French Scorpène-class submarines, which are in service with both navies (Brazil 2025). This rapprochement represents a significant step forward in the diversification of Brazil's military partners and highlights the potential of this partnership, given the stature of these nations. It is worth recalling that in 2015 the US Naval War College organised the 'Regional Maritime Cooperation' workshop for allied navies at the Brazilian Naval War College. Thus, a decade separates these events, marking a shift from US mediation towards an increasingly strengthened relationship between Brazil and India.

In this regard, the focus of this cooperation will be on military procurement, with potential benefits for both countries' industrial bases. India has already expressed an interest in acquiring six Embraer E-145 aircraft for conversion into early warning and air traffic control platforms. It is worth noting that Embraer also aims to sell the KC-390 Millennium multi-mission aircraft to India, including the prospect of co-production with the Indian company Mahindra Systems. It has therefore announced that it will open a regional office in New Delhi. There is, therefore, scope for industrial partnerships, technology transfer and the co-production of equipment, particularly in the areas of airborne systems, radars, munitions and armoured vehicles (Brazil 2025).

The decision to forge closer ties with India is underpinned by 77 years of diplomatic relations. Since 2006, Brazil and India have maintained a 'strategic partnership' and have cooperated closely in forums such as the BRICS, the G20 and IBSA (a forum for trilateral dialogue and cooperation between India, Brazil and South Africa). It should also be noted that the navies of IBSA have, since 2008, periodically conducted the IBSAMAR naval exercise to strengthen interoperability and maritime security, as well as to simulate combat and air-sea operations between the three countries.

It is worth noting the strategic importance of South Africa in relation to the Cape maritime route, one of the main global alternatives to the Suez Canal. In this regard, the South African Navy's participation in the 'Will for Peace' naval exercise, which took place in January 2026, is particularly noteworthy. Organised by China, Russia and Iran, this operation aims to protect trade routes and promote interoperability between navies within the BRICS+ framework at a time of heightened geopolitical tension following US attacks on Iran. It should be noted that Brazil is participating in the manoeuvres solely as an observer, a stance also adopted by Indonesia and

Ethiopia (Poder Naval 2026).

The Indian example demonstrates how diversifying partners could reduce Brazil's dependence, particularly at a time of escalating investment in defence products. Furthermore, it strengthens cooperation with partners in the Global South. In this regard, it is important for Brazil to seek partners who share the "same ambition to develop an autonomous defence capability, anchored in mutual trust and the pursuit of indigenous technological solutions", in the words of Vice-President Geraldo Alckmin (Brazil 2025).

South Korea. In October 2025, Brazil and South Korea signed a memorandum of understanding on technological cooperation, knowledge transfer and the co-development of defence systems. The agreement covers the fields of aviation, artillery, communications and cyber security. Furthermore, it provides for joint studies on propulsion systems, radars and next-generation military vehicles. Whilst South Korea seeks to expand its exports of defence products, Brazil is seeking to diversify its suppliers to reduce its dependence on NATO member states.

This agreement could lead to the joint production of drones, armoured vehicles and medium-range missile systems, as well as training and exchange programmes between the Armed Forces of the two countries. South Korea has already expressed interest in acquiring Embraer KC-390 Millennium aircraft. Furthermore, the Asian country possesses air defence technologies sought by the Brazilian Army, such as AESA radars, air defence missile systems and hybrid propulsion. The first technical meeting to implement this agreement is still expected to take place in 2026, focusing on systems interoperability and the training of officers (Budeguer 2025).

The alignment with the US that hinders diversification

During the tariff crackdown imposed by Trump against Brazil in 2025, it is speculated that the Lula government considered blocking the purchase of military equipment from the US, just as it had done against Israel in the face of the genocidal offensive in Gaza. Lula would thereby seek to replace the dependence on the US with equipment from China, Europe and Russia. However, despite the dire state of bilateral relations – characterised not so much by provocations against President Lula as by the absence of a US ambassador to the country – military exercises and the fulfilment of contracts have been ensured by the Armed Forces, even though this runs counter to the country's foreign policy (Bonin 2025).

One example illustrates this disconnection between foreign policy

and the autonomy of the Brazilian military in overseas procurement. Back in 2024, despite the expected upheavals on the international political scene resulting from Trump's return to the White House, a delegation from the Brazilian Army travelled to Washington to negotiate the purchase of twenty Black Hawk helicopters, as well as spare parts, training and Javelin missiles. This case illustrates how the Army's office in Washington carries out procurements that are out of step with the demands of the other branches of the Armed Forces. Furthermore, it highlights how this autonomy to negotiate directly abroad – due to the Ministry of Defence's inability to centralise such procurements – ensures the country's dependence on US military equipment (Campos 2025a; Campos 2025b).

Among defence scholars, there is a prevailing perception that the Brazilian military accepts the country's dependence on and subordination to US interests. This is, for example, the position of Professor Carlos Eduardo da Rosa Martins, of the Institute of International Relations and Defence at UFRJ. Consequently, the Brazilian military does not contribute to a foreign policy capable of safeguarding the national interest in the strategic environment – as evidenced by the Lula III government's inability to prevent, notably through mediation, the US military intervention that resulted in the abduction of Venezuelan President Maduro in January 2026.

Such dependence and subordination prevent the government from implementing the guidelines set out in national defence documents and grounded in the constitutional principles that guide Brazil's foreign relations, notably that of the self-determination of peoples. Thus, this ideological stance of the Brazilian military is in itself a limiting factor on any diversification of partnerships. According to Martins, "the most they aspire to is collaboration with the United States, perhaps associate membership in NATO, or some assistance in exchange for alignment. There is no independent plan to use our capabilities to create an autonomous technological base" (Campos 2026).

Criticism from defence experts is echoed by external oversight bodies. For example, the Federal Court of Accounts (TCU), an oversight body belonging to the National Congress, identified in an audit of military procurement failures in the publicity of tenders, the misuse of funds for the acquisition of durable goods, accounting irregularities, weaknesses in internal controls and favouritism towards certain companies. Regarding the latter shortcoming, the TCU pointed out that the Ministry of Defence maintains a ministerial order that directs Armed Forces procurement towards foreign companies to the detriment of domestic ones, thereby undermining the country's development objectives (TCU 2025; Campos 2025c).

It should be noted that procurement in the defence sector is particularly

prone to corruption and ulterior motives due to the secrecy surrounding negotiations. The need for secrecy stems, notably, from the scope of the partnership, which generally involves cooperation between governments to ensure the continuity of supply. Consequently, objective criteria typically applied in tendering processes, such as technical specifications and price, are generally diluted by foreign policy interests. However, despite the existence of the Ministry of Defence since 1999, it remains the responsibility of each branch of the Armed Forces to determine requirements, analyse the market, and negotiate demand, payment terms and offset arrangements. Furthermore, each branch of the Armed Forces assesses the quality of the product delivered or service provided and oversees the execution of the contract, including the verification, negotiation and adjustment of the contractual economic and financial balance. In other words, there is no effective ministerial control to segregate the different phases of the procurement process in order to avoid conflicts of interest.

Closer ties with China and the attempt to sell part of Avibras

Upon his return to the presidency in 2023, Lula announced agreements with China during his visit to Beijing that same year. The most significant aspect of the strengthening of relations was the visit to China by the Commander of the Brazilian Army, General Tomás Paiva, in June 2024. On that occasion, General Tomás met with the Chinese Defence Minister, Admiral Dong Jung, and visited Norinco, a defence company based in Beijing. This visit signalled the Brazilian government's endorsement of Norinco's acquisition of a 49 per cent stake in the Brazilian company Avibras Indústria Aeroespacial, which was facing financial difficulties (Defesanet 2024).

Avibras' strategic importance lies in its ability to produce a rocket and missile launch system called ASTROS, which can destroy ground targets within a range of 300 kilometres (Avibras 2024). Avibras Indústria Aeroespacial S/A is a private company, based in São José dos Campos, in the state of São Paulo, with over 50 years' experience. A change in the company's management has affected its finances, and its employees are facing wage arrears. Interestingly, whilst it is a leading player in the development of defence products in the Southern Hemisphere, Avibras has also made its mark on the history of the Brazilian labour movement, as its workers have been suffering from delayed wages for almost three years (Ficher 2026).

For its part, Norinco (the official English name for China North Industries Corporation, 北方工业) was founded in 1980 and is the cornerstone

of equipment development for the People's Liberation Army (PLA). Norinco serves as an instrument for the implementation of China's 'Going Global' and 'Belt and Road Initiative' strategies (China Daily 2019; Xinhua 2024a).

In addition to Norinco, which submitted its letter of intent just one month before General Tomás's visit, two other companies were in the running to acquire Avibras's shares: the Australian firm DefendTex and a company from the United Arab Emirates. The United States backed DefendTex and suggested sanctions against Avibras should Norinco succeed. Norinco's proposal, however, envisaged keeping majority shareholding in Brazilian hands, which would have been more advantageous for Brazil given the company's strategic importance to the capabilities of the Brazilian Army.

The expectation at the time was that, should Norinco win this dispute, defence cooperation between Brazil and China would move beyond a mere exchange of military students to include industrial production and the development of weapons systems on a scale never before seen by Brazil in its relationship with the United States. Brazil already has a long-standing partnership with China in the field of satellites. However, if this partnership were to succeed, it would represent a groundbreaking opportunity for cooperation in military technologies. The visit in question was mentioned in passing in the Chinese press:

Chinese Defense Minister Dong Jun on Monday met with Brazilian Army Commander Tomás Ribeiro Paiva in Beijing.

Noting that this year marks the 50th anniversary of the establishment of diplomatic relations between China and Brazil, Dong said the relationship between the two militaries enjoys a solid foundation for cooperation and extensive common interests, and deepening this relationship holds broad prospects.

Dong called on both sides to enhance exchanges, learn from each other, and take China-Brazil military relations to a new height.

Tomás said that the Brazilian army is willing to further strengthen communication and exchanges with its Chinese counterpart and deepen cooperation in various fields. (Xinhua 2024b)

As the note above suggests, Brazil and China have been cooperating for many years (Marcondes, Batista Barbosa 2018; OPEB 2023). For example, President Dilma signed a defence cooperation agreement with China in April 2011 (Barros et al. 2024). Even during the Bolsonaro administration, both countries agreed to uphold multilateralism and the central role of the United Nations in peace and security.

President Lula's visit to President Xi Jinping in Beijing in April 2023 resulted in the announcement of a strengthened strategic partnership. In June 2023, 18 high-ranking Chinese generals visited the Brazilian Army Headquarters, a move of great symbolic significance as it demonstrated both countries' willingness to forge partnerships in defence. However, this exchange has not yet led to deeper cooperation on military matters. In 2024, for example, Brazil had only two military attachés in China. By comparison, Brazil has four military attachés in the US and cooperation offices for each of the armed services in Washington. Norinco's attempt to acquire a significant stake in Avibras, which involved diplomatic negotiations and mutual trust, was the first step – albeit an unsuccessful one – towards a potentially significant agreement between the two countries. As this example involves the defence industrial base, it may serve as inspiration for other BRICS members, much like Embraer's rapprochement with India.

Another opportunity for cooperation between BRICS members lies in the field of communications and satellites. There is great potential for cooperation and investment in information and communication technologies. Brazil and China, for instance, have already signed a Memorandum of Understanding on this subject to encourage mechanisms that facilitate the creation of joint ventures and technological partnerships between companies in both countries. Brazil and China have also launched a successful satellite programme, although there has been criticism regarding the lack of technological benefits for Brazil (Almeida Filho 2025, 287–301).

The China-Brazil Earth Resources Satellite Programme (CBERS), established in 1988, aims to strengthen and expand cooperation for the peaceful use of outer space, emphasising the joint development of new technologies and projects involving technology transfer. As members of the BRICS, Brazil and China have agreed to expand cooperation in areas such as lunar exploration and deep space. Furthermore, this partnership includes the development of the BINGO Radio Telescope, currently under construction in Brazil, which is dedicated to research into dark matter. However, this partnership is not merely bilateral, as it has the potential to include other members. For example, Brazil and China have set the goal of developing the BRICS Remote Sensing Satellite Constellation, an example of South–South cooperation with benefits for all involved (Brazil 2023).

The successful joint development of satellites illustrates how the BRICS countries can cooperate on security and defence. This field is particularly sensitive to unilateral sanctions and is intrinsically linked to the development of a multipolar system, as sovereign states must seek to reduce their dependence on the hegemonic power in terms of the military industry

and strategic communications.

Final remarks

This article sought to identify attempts by the Lula III government to diversify its partnerships in the field of national defence between 2023 and 2025. Projects such as the Brazilian-built frigates demonstrate that significant initiatives were undertaken to diversify suppliers and partners in the development of defence projects. In this regard, attention should be paid to the EDGE Group, based in the United Arab Emirates, which has been acquiring Brazilian defence companies.

Emphasis was placed on the rapprochement with China and the attempt to sell part of Avibras to a state-owned enterprise in that country. Despite the nationalistic tone of the defence documents, the Lula III government pursued these negotiations as a means of bringing Avibras – a strategic company with expertise in rocket launch technologies – closer to the Chinese state-owned firm Norinco. Although the deal did not go ahead, this case demonstrates an unprecedented interest in forging closer ties with China within the defence industry. If we examine only the period between 2023 and 2025, the Avibras case appears to highlight the Lula III government's difficulty in finding a domestic solution for the company's future. It is worth noting that the decline in Brazilian government procurement accelerated Avibras's indebtedness from 2020 onwards, resulting in the suspension of its activities in 2022. Between 2024 and 2025, in addition to the Chinese firm Norinco, at least two other foreign groups – the Australian firm DefendTex and the Saudi firm Black Storm Military Industries – expressed an interest in acquiring control of the company (LRCA Defense Consulting 2026).

In April 2026, Avibras resumed operations under a commercial arrangement involving an investment of R\$ 300 million from businessman Joesley Baptista of the JBS group (Gouvea de Andrade 2026). The following month, the Ministry of Defence recognised the new entity as a strategic defence company (Avibras Aeroco 2026), which entitles it to a preferential tax regime. This corporate manoeuvre has fuelled speculation as to why an investor from the food sector would have rescued the company. It is worth noting that JBS became the world's largest producer of animal protein thanks to loans granted during the Lula I and II administrations by the federal bank BNDES, which currently holds 20% of the group's shares as a result of shares provided as collateral (JBS 2025).

The fact is that, in light of the increase in defence spending announced

by the federal government in 2025 (Queiroz 2026) – which is in line with the global trend – the new Avibras appears to be close to achieving financial stability. President Lula’s visit in July 2026 to the ceremony marking the resumption of the company’s production line in Jacareí, accompanied by Vice-President Geraldo Alckmin, the Minister of Defence, José Múcio, and the Minister of Science, Technology and Innovation, Luciana Santos, as well as three military commanders, demonstrates the government’s recognition of the company’s strategic importance, as it remains a Brazilian enterprise (Garcia 2026). This visit is highly symbolic, as, as a former metalworker and trade unionist, Lula was able to play a part in – and most likely contributed to – the revival of a company marked by one of the most emblematic cases of recent industrial collapse, which has already gone down in the history of the Brazilian labour movement.

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ABSTRACT

This article analyses the initiatives of Lula's third administration to diversify Brazil's defence partnerships between 2023 and 2025, highlighting both significant advances and structural obstacles. On the one hand, the period saw unprecedented agreements with non-traditional actors, such as the EDGE Group of the United Arab Emirates, as well as closer ties with India, South Korea, Saudi Arabia, and Benin, and the consolidation of the partnership with Portugal, which expanded Embraer's access to the NATO market. On the other hand, the attempt to sell part of Avibras to the Chinese company Norinco failed, highlighting the difficulty of establishing partnerships with the Global South in a strategic sector. The study points out that, despite the official discourse of strengthening the national industry and reducing external dependence, the autonomy of the Armed Forces in acquisitions, the technical-military alignment with the United States, and the governance weaknesses of the Ministry of Defence limit effective diversification, keeping Brazil predominantly linked to NATO suppliers and reflecting a mismatch between presidential foreign policy and the institutional practice of the Armed Forces.

KEYWORDS

National defence, International cooperation, Brazil-China relations

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