



Photo: Brian Winter, CEBRI Conference, February 4, 2026, Rio de Janeiro. Picture: Lucas Machado.

“President Trump is Currently Interested in a More Constructive Relationship with President Lula and with Brazil”

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BRIAN WINTER

Brian Winter is the editor-in-chief of *Americas Quarterly* and a seasoned analyst of Latin American politics, with more than 25 years following the region’s ups and downs. He has been described as “one of the best chroniclers and analysts of Latin America” by *Foreign Affairs*, and “the best foreign expert on Brazil of this moment” by *GloboNews*. Brian lived for a decade in Brazil, Argentina and Mexico as a journalist for Reuters before joining *Americas Society and Council of the Americas*, where he is also the vice president for policy. His books include *Why Soccer Matters*, a *New York Times* bestseller he wrote with the Brazilian soccer legend Pelé; *The Accidental President of Brazil*, co-written with President Fernando Henrique Cardoso; and *The Ugliest City You’ll Ever Love*, a book about São Paulo to be published in early 2026. Brian speaks frequently about Latin America to investors, media, universities and other audiences around the world. A graduate of the University of Texas, he speaks Portuguese and Spanish and is a prolific barbecuer and cook. Follow him on social media @BrazilBrian.

(Source: <https://americasquarterly.org>)

You argue that Trump’s recent engagement with Brazil reflects more of a tactical cooling-off than a strategic reset. What domestic political pressures and international calculations do you see as most decisive behind this shift—and how durable do you think this new tone really is?

BRIAN WINTER: Brazil has reached a new accommodation with President Trump, although this could change quickly. There were definite factors explaining why President Trump altered his strategy after approximately September of last year. One was

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inflation in the United States and the risks implied by Brazilian exports, coffee and meat in particular. There was also a broader global issue involving critical minerals and the urgency that followed China’s announcement of the possibility of an embargo on shipments of those minerals to the United States.

Domestic political considerations also mattered. It became clear to President Trump that sanctions and tariffs were having the opposite effect of what he intended. Rather than helping President Bolsonaro, they ended up benefiting President Lula. President Trump is currently interested in a more constructive relationship with President Lula and with Brazil. These strategic considerations were central to the shift.

There is also a view that, on a personal level, President Trump grew tired of dealing with Brazil, had other priorities, and wanted to resolve the issue so it no longer demanded his attention. How long this will last remains uncertain because there are other potential areas of conflict, ranging from Chinese investments in Brazilian ports and infrastructure to the 2026 Brazilian election. In that election, President Trump will likely seek to weigh in and influence the outcome through public statements or symbolic gestures. It may just be with tweets, or by receiving Flávio Bolsonaro at Mar-a-Lago or at the White House. This story is not over yet.

You have highlighted the role of backchannel actors in facilitating dialogue between Washington and Brasília. How important were these informal intermediaries compared to traditional diplomatic institutions, and what does this tell us about how US-Brazil relations are managed today?

BW: The world is changing, and diplomacy is changing with it. One of the clearest signals that the American stance on Brazil was shifting, in August and September of 2025, was Richard Grenell's trip to Brazil. Remarkably, this visit did not appear in the press at the time, even though he met with many people during a highly sensitive period. It was someone operating outside the traditional State Department structure who began assembling what later became the truce between the United States and Brazil.

Brazil is not the only case where this pattern has appeared. The current diplomatic operation in Washington is unusual. On one hand, Marco Rubio wields considerable power as Secretary of State and as head of the National Security Council. On the other hand, there are figures like Grenell and various regional envoys appointed to handle key issues. What unites these dynamics is a US government that is less institutional and more personal than ever before, a pattern that is not traditionally how American diplomacy has functioned, but is now less about which institution

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Formal titles matter less than the ability to speak directly with President Trump. The Brazilian case demonstrated this clearly, not only diplomatically but also economically. Another critical step in thawing relations between the two countries was a series of meetings between corporate and business leaders and President Trump and his emissaries. Some of these encounters became public, such as meetings between JBS executives and the President, which were reportedly important. Others were less visible, including meetings involving figures such as J.D. Vance and Marco Rubio.

This reflects the pattern of contemporary Washington. International issues are

no longer necessarily resolved through the State Department. Instead, they are often handled directly through the Oval Office or through lobbyists and intermediaries within President Trump’s personal circle who can advocate for specific interests.

Even with reduced tensions, you suggest that economic and political pressure on Brazil is likely to continue. Looking ahead to 2026, which issues—such as trade, critical minerals, technology, or democracy—do you expect to become the main sources of friction between Lula and Trump, and what would a realistic strategy for managing these differences look like from Brazil’s perspective?

BW: This question touches on a broader lesson from Brazil’s recent experience. I am proud to be associated with Brazil, a country I have lived in and that has become an important part of my professional life. Over the past six months, many people have asked how Brazil managed to enter into a direct confrontation with Donald Trump and not only survive but also emerge relatively well-positioned. It is not clear that there was a definitive winner or loser, since this episode is likely to end with an agreement on critical minerals that benefits both Brazil and the United States.

However, one lesson is that Brazil had more power from the outset than many observers, myself included, believed it did. I had argued publicly that Brazil’s economy was vulnerable and that, for the US economy, Brazil represented little more than a rounding error. That assessment was wrong. Brazil was able to find alternative markets for most of its exports, and Brazilian and American companies ensured from the beginning that the list of tariff exceptions was substantial.

At the same time, the United States proved more vulnerable than expected, particularly regarding coffee and meat supplies. From Brazil’s perspective, the lesson is that its size and diversified international relationships provide a degree of resilience in confrontations of this kind. The downside is that this model is difficult for other countries to replicate. There is only one Brazil, and in Latin America, no other country comes close to this scale and level of importance. Mexico is the only country that comes close in size, but its vulnerability lies in the fact that more than 80% of its exports go to the United States.

It is an interesting case for Brazil, but less instructive for other countries around the world. One possible exception is Europe, where there is ongoing debate about whether to confront President Trump directly or pursue accommodation. The Brazilian experience suggests that Europe may have more leverage than it

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You argue that Trump's foreign policy toward Latin America has been relatively successful so far (as of February 2026), and that President Trump views the region primarily through two lenses: immigration and organized crime/drug trafficking. But Venezuela is not directly connected to these two issues, even though Trump framed the attack in those terms. Do you think the intervention in Venezuela can be explained solely by these two factors, or does strategic competition with China also play a significant role?

BW: Immigration and drug trafficking were indeed important factors in explaining the US operation in Venezuela and the subsequent accommodation reached with what remains of the Venezuelan government. While other parts of the Caribbean and

Latin America play a larger role in drug trafficking than Venezuela does, the presence of organized crime groups and cocaine trafficking there is undeniable.

In the context of migration, Venezuela experienced an extraordinary crisis, with roughly eight million people leaving over a decade, equivalent to a quarter of the population. Most migrated to other South American countries rather than to the United States, which helps explain why public opinion across much of South America supported President Trump's actions. People in countries such as Colombia, Peru, Chile, and Brazil directly witnessed the effects of Nicolás Maduro's policies and the strain that large migration waves placed on social services and public systems. Brazil is somewhat of an exception, but the broader regional impact was visible.

On the day of the military operation, January 3, President Trump focused heavily on oil in his press conference, mentioning it repeatedly and not referring to democracy at all. Oil was clearly a priority. China was also a factor, though not the top priority. Strategic competition with China matters to the United States in Latin America, but it currently ranks below migration, drugs, and access to natural resources such as oil and critical minerals. There is debate within the Trump administration about this hierarchy, and it may evolve over the remaining years of the administration.

China is undeniably expanding its presence in countries such as Brazil,

but Latin America is changing as well. The region is shifting to the right politically, as seen in Ecuador, Bolivia, Chile, and Costa Rica, with more elections on the horizon. There may soon be additional right-wing leaders

aligned with Trump in countries such as Colombia, Peru, and possibly Brazil. Latin America has rarely attracted as much attention as it does now, and this heightened focus is likely to continue through 2026. ■

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