



**MARCH 18-22, 2024**  
**SAN FRANCISCO, CA**

# A Decade Unveiled

The Brazilian Indie Game Scene's Transformative Journey

Ana Ribeiro • Arthur Protasio • Bruno Campagnolo

Sandro Manfredini • Thais Weiller

**#GDC2024**

# Once Upon A Time... in Brazil



**Bruno**



**Thais**



**Arthur**



**Ana**



**Sandro**

# Hello!!

- Coordinator of Game Courses at PUCPR (2015);
- Organizer of the Global Game Jam Curitiba (2010), which is one of the largest game jams in the world;
- First job in the games industry (2004): Continuum Entertainment.
- I LOVE to organize jams and play parties!





# Global Game Jam Curitiba:



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# Continuum... Inferno...





# The Jam Vibe



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# PUCPR - Gaming courses





# The Jam Vibe





# Brazil today (market)

- **Emerging consumer market:**
  - 10th in the world
  - US\$ 2,3 billion in sales
- 73% of the population plays games and 50% consider themselves gamers
- 48% prefer mobile gaming platforms.
- Same issues from 2013:
  - High taxes for tech products
  - Language Barrier (portuguese)



R\$ 4.000,00 =~  
US\$ 800,00



R\$ 9.000,00 =~  
US\$ 1800,00

# Global Ranking of Countries and Regions 2023

## Very high proficiency

- 1 Netherlands (647)
- 2 Singapore (631)
- 3 Austria (616)
- 4 Denmark (615)
- 5 Norway (614)
- 6 Sweden (609)
- 7 Belgium (608)
- 8 Portugal (607)
- 9 South Africa (605)
- 10 Germany (604)
- 11 Croatia (603)
- 12 Greece (602)

## High proficiency

- 13 Poland (598)
- 14 Finland (597)
- 15 Romania (596)
- 16 Bulgaria (589)
- 17 Hungary (588)
- 18 Slovakia (587)
- 19 Kenya (584)
- 20 Philippines (578)
- 21 Lithuania (576)
- 22 Luxembourg (575)
- 23 Estonia (570)
- 24 Serbia (569)
- 25 Malaysia (568)

## Moderate proficiency

- 31 Honduras (544)
- 32 Georgia (541)
- 33 Belarus (539)
- 34 Ghana (537)
- 35 Spain (535)
- 35 Italy (535)
- 38 Costa Rica (534)
- 39 Albania (533)
- 39 Uruguay (533)
- 41 Bolivia (532)
- 41 Russia (532)
- 43 Cuba (531)

## Low Proficiency

- 64 Pakistan (497)
- 65 Lebanon (496)
- 66 Turkey (493)
- 67 Sri Lanka (491)
- 67 Tanzania (491)
- 69 Ethiopia (490)
- 70 Brazil (487)
- 71 U.A.E. (486)
- 71 Panama (486)
- 73 Mongolia (482)
- 73 Qatar (482)
- 75 Colombia (480)
- 76 Morocco (478)

## Very low proficiency

- 92 Palestine (445)
- 93 Uzbekistan (442)
- 94 Cameroon (438)
- 94 Senegal (438)
- 96 Jordan (431)
- 97 Sudan (430)
- 98 Cambodia (421)
- 98 Haiti (421)
- 100 Oman (418)
- 101 Angola (416)
- 101 Thailand (416)
- 101 Benin (416)
- 104 Kazakhstan (415)



46° (2012) => 38° (2013) => 70° (2023)



# Brazil today (development)

- Focus on international scene (**58%**) and entertainment (**86%**)
- Grown from **2013** to **2023**:
  - **200+** dev groups -> 1.000+ dev groups
  - **2.000** professionals -> **13.000+** professionals
- Indie groups, students, medium-size companies and even **Unicorns** and **Multinational Companies**



Brazil  
Games  
EXPORT PROGRAM

ABRAGAMES

apexBrasil

# Brazil today (development)



AQUIRIS  
EPIC GAMES  
BRASIL

KOKKU





# BRAZILIANS today (development)



# Brazil Ecosystem

- **Events:**
  - **Brasil Game Show: 300.000+**
  - **BIG Festival: now gamescom latam**
  - **GameJam+ / GGJ: international game jams**
- **Associations and groups:**
  - **ABRAGAMES**
  - **17 Regional Associations**





# 2013...



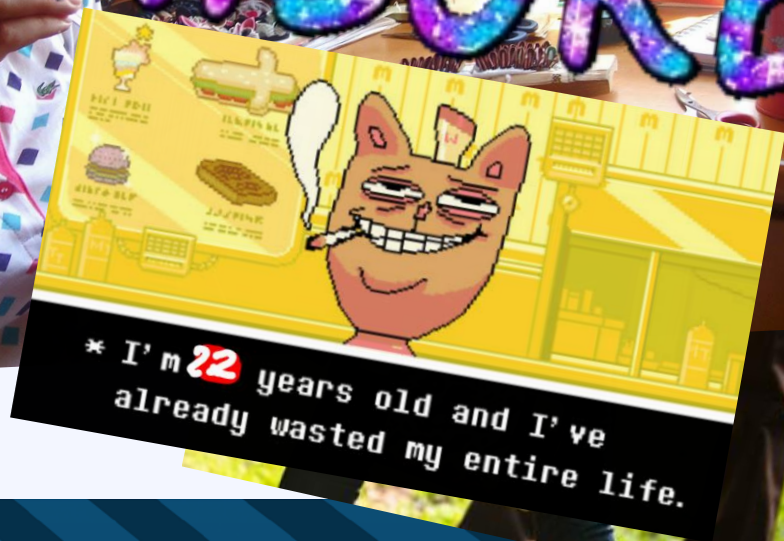
# Our future





Hell

FAILURE





# When I joined

- It felt like a dream
- It felt invisible (even though there are Brazilian games from the 1980's)
- There were dev groups, but mostly from corpo types
- A lot of devs and companies, but people didn't talk



# IndieRevolution

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# How Brazil was different from Indie game the movie

- No government funding
- No dev kits/big company presences
- Little publisher presence



# The groups

- Students
- Artists
- Jr developers
- Weirdos
- Bars
- Expositions
- Jams
- Hangouts
- Online forums
- Informal gathering

# The strategy

# Why community?

- Get to know more developers
- Talk shop
- Future collabs and partnerships
- Bigger bargaining power

it is nice to be part  
of something

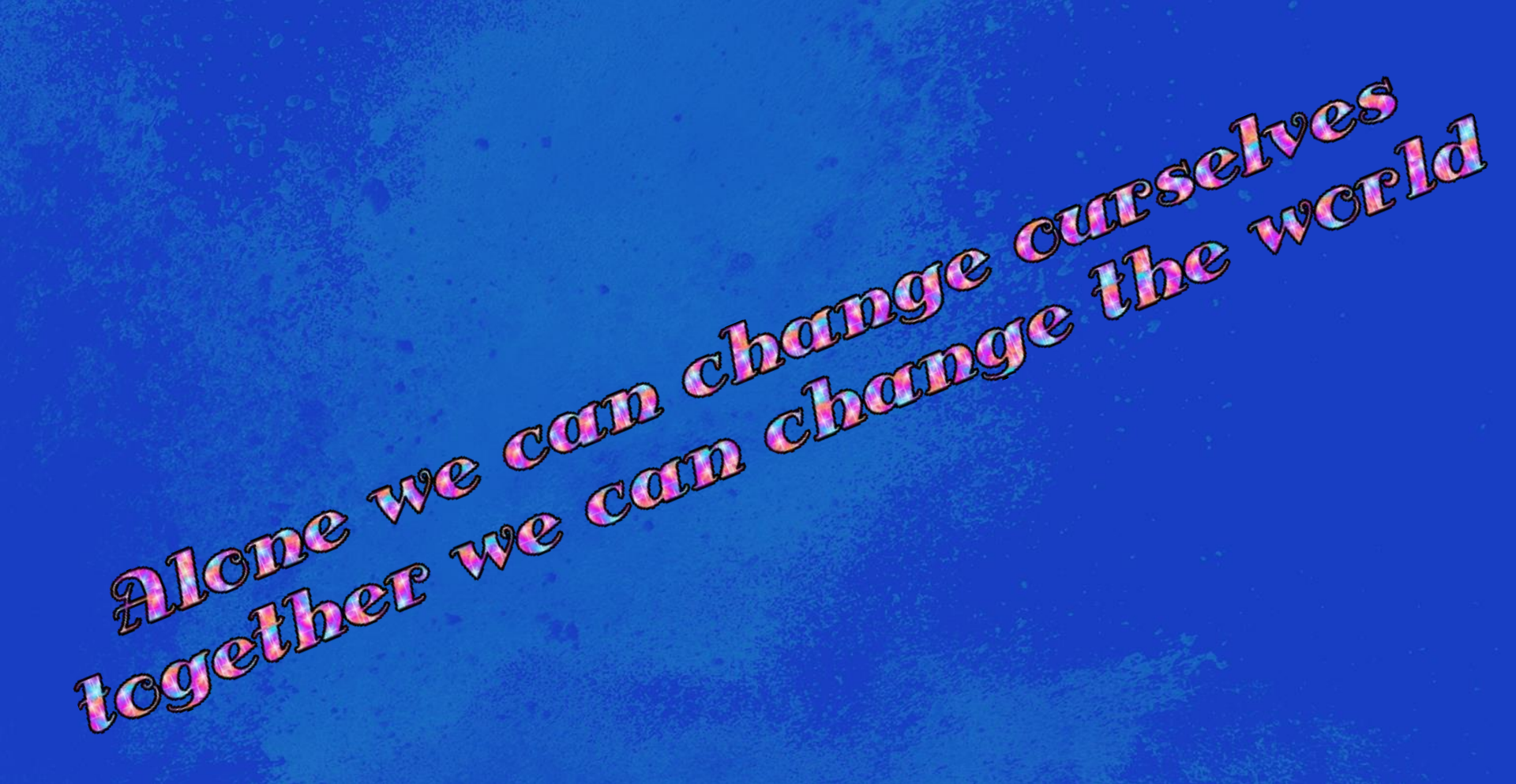
# And everybody plays nice?

- **NO**
- **And that's part of why community is important too!**



# How things change?

- Some governmental funding
- Some big companies
- People talk and make friends across the country
- Laws are being approved to help developers
- State, city, profession based and gender based communities
- There are many, many small studios and indie developers
- I'm happy now, thanks for asking 😊



Alone we can change ourselves  
together we can change the world



# HI, I'M ARTHUR!



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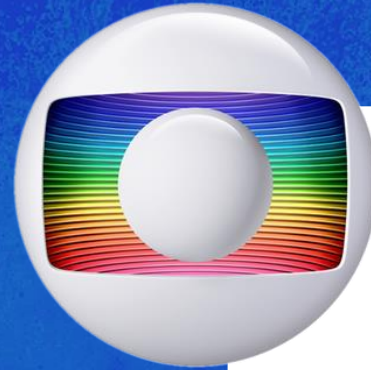
GDC



# DIFFERENT ORIGINS, DIFFERENT REFERENCES



≠



EMMY® AWARD  
NOMINEE

# FORGE YOUR UNIQUE PATH





# GLOBAL REACH

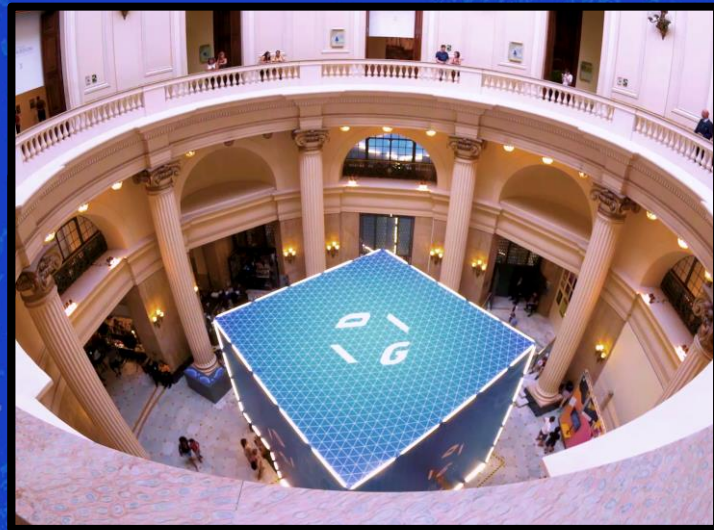


FableMare



WINNER  
BEST OF THE SHOW

team17



# WITH LOCAL ROOTS

# A DECADE OF ADVENTURES



2014



2016



2018



2020



2022



2024

2015



2017



2019



2021



2023





# CHAMPION YOUR CULTURE & VOICE



# BUILD A NEW STANDARD



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"Without the NFTS,  
I cannot see how I  
would have entered  
the film industry"

Oscar nominated and BAFTA award-winning  
graduate Roger Deakins, Cinematographer,  
*True Grit*, *No Country for Old Men*, *Fargo*,  
*The Big Lebowski*, *Bank Redemption*

I'm ANA

This is how I got here







# The Indie VR Dev Journey







**IN 2017 I JOINED ARVORE**



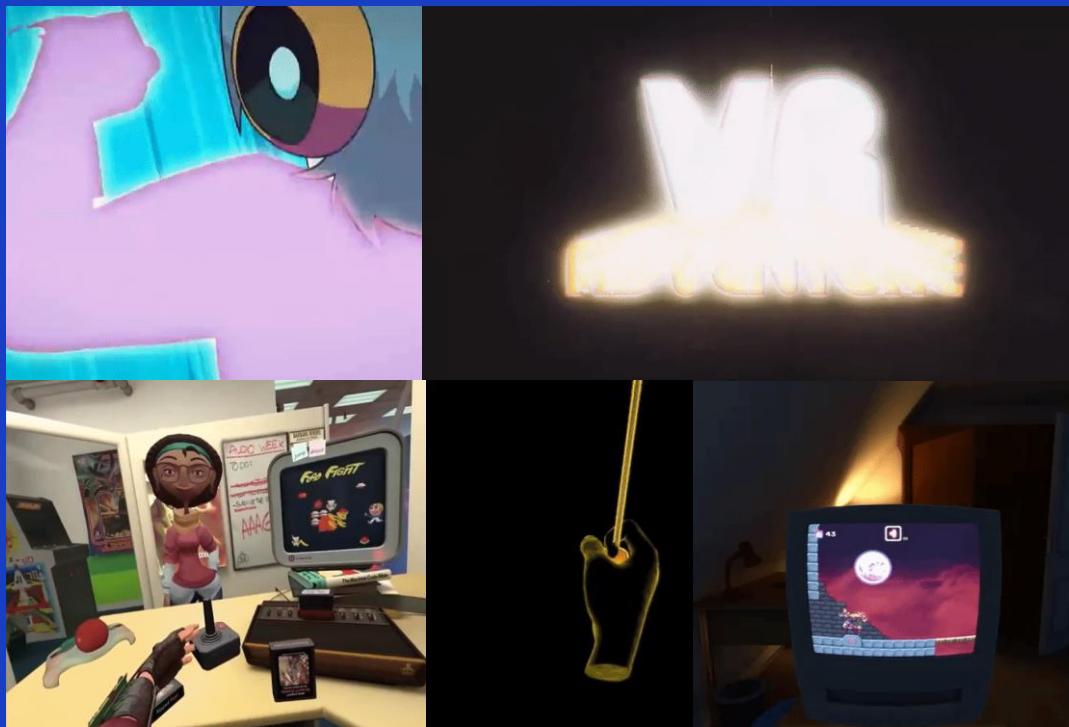




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# Today ARVORE is the leading XR Studio in Latin America



# The XR Industry in Brazil Today

- Unfortunately Brazil represents less than 1% of our sales, so we have to focus on US Market which represents over 70%.
- But why Brazilian Market is so behind?
- For XR industry go mainstream, companies have to go beyond US borders



QUEST 3



**\$499**



**\$958**

R\$4.785k



PSVR 2



**\$549,99**



**\$1.021**

R\$5.099k



VISION PRO

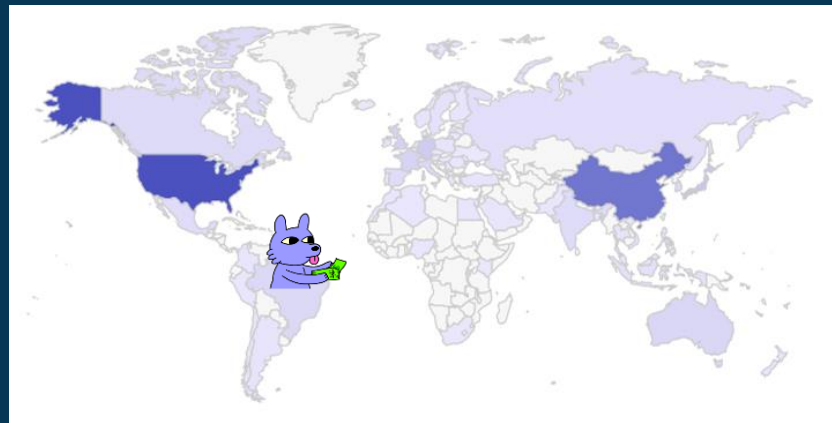


**\$3.499**



**\$5.400**

R\$27.000K



**USA Dominates The Market by 31.22%**  
**Fastest growing is Asia Pacific**





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**Sandro Manfredini**

Co-Founder at Aquiris

Business Director at Epic Games

Former President of Abragames (2018-2021)

*2007*



**Foundation**

Stay in business first

AQUIRIS





2007



## Foundation

Stay in business first

2008



## Pioneers

One of the first studios  
to adopt Unity in  
Latam

2009



## Rapid Learning

+10 projects in 2 years,  
including first Online  
Multiplayer

2010



## Unity 3.0

### Official Demo

And the Cartoon Network  
partnership begins

2007



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**Unity Awards**

Ballistic is "Unity  
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**Cheers! Series A  
Investment Round**

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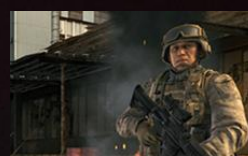
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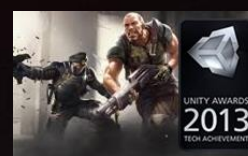


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**Horizon Chase World Tour**

80 MILLION DOWNLOADS  
MetaCritic 88

AQUIRIS



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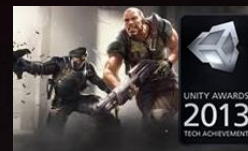
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The sequel of Copa Toon  
2014

2018



#### Horizon Chase Turbo

Switch / PS4 / XBOX / PC

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#### Looney Tunes: World of Mayhem

Published by Scopely

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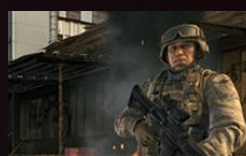
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Published by Scopely



**Released April 2021**

Apple Arcade

AQUIRIS



AQUIRIS

2007



### Foundation

The dream takes off

2008



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Released April 2021  
Apple Arcade



Released Sept 2022  
Apple Arcade



2023  
EGS + Switch Crossplay







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# Takeaways

## *International Relationships*

We are far from the industry

**ABRA  
GAMES**

+

**apexBrasil**   
Brazilian Trade and  
Investment Promotion Agency

**Brazil  
Games**   
EXPORT PROGRAM



  
**BIG**  
Brazil's Independent  
Games Festival



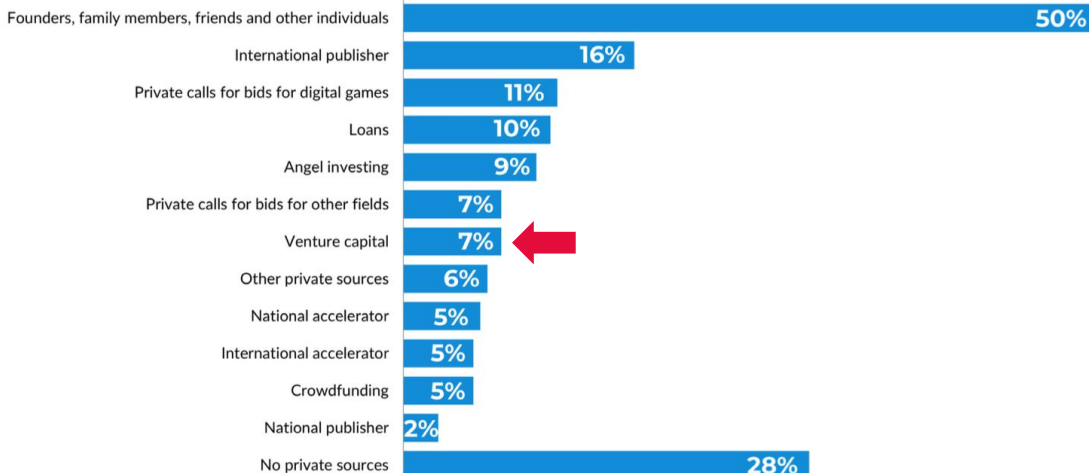
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# Takeaways

*No Funding*

Studios with VC investment  
are rare in Brazil

## PRIVATE FUNDING SOURCES



Source: BRAZIL INDUSTRY GAME REPORT 2022

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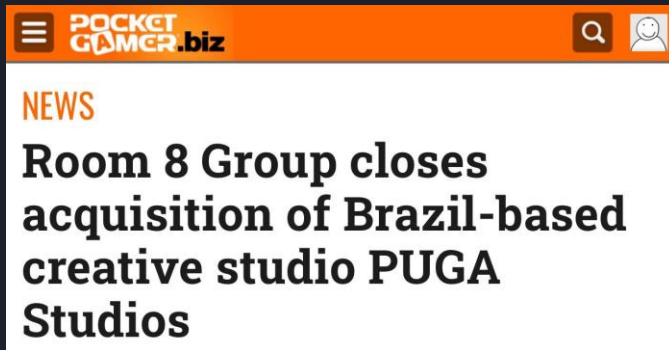


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# Takeaways

## *World-class talents*

(Google, Facebook, and other big techs have development offices in Brazil)



Awakening The Sleeping Giant: Why Brazil's Tech Scene Is One To Watch

Venturebeat

Guest

Brazil is emerging as a world-class AI innovation hub

#GDC2024



# IT'S DANGEROUS TO GO ALONE, TAKE THIS...



# ~~IT'S DANGEROUS TO GO ALONE, TAKE THIS...~~ YOU'RE NOT ALONE, TAKE THIS...

**Bruno**



[Brunodepaula@gmail.com](mailto:Brunodepaula@gmail.com)

"Make small games"

**Thais**



[thaisweiller@gmail.com](mailto:thaisweiller@gmail.com)

"Together we can change the world"

**Arthur**



[arthurprotasio.com](http://arthurprotasio.com)

"Don't hesitate to embrace your voice and experiment"

**Ana**



[ana@arvore.io](mailto:ana@arvore.io)  
[@anagamedev](https://twitter.com/anagamedev)

"XR is here to stay and it's not too late to dive in"

**Sandro**



[linkedin.com/in/sandromanfredini](https://www.linkedin.com/in/sandromanfredini)

"Any industry relationship can be helpful in the future"