

## **‘Export or Die’**

### agriculture, capital accumulation, and class struggle in Brazil

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## **ABSTRACT**

This article-based doctoral thesis comprises four standalone scholarly articles, three of them published, plus an introductory and final essay. Two features bind them: the focus on export agriculture in Brazil and the class-based political economy method of analysis.

In the early 2000s, Brazil experienced an economic upturn primarily attributed to the performance and virtues of its agribusiness. Agricultural exports were engines of macroeconomic stabilization and growth, keeping inflation and trade balance in check. Luiz Inácio Lula da Silva (hereafter, Lula), who had been elected from the Workers’ Party (PT) at the end of 2002, reaped the benefits of this economic recovery and steered economic growth, promoting a series of income redistribution policies that positively impacted the domestic mass market until the end of the decade. Lula stayed in power for two mandates and helped to elect and re-elect Rousseff, amassing 13 years of PT’s leadership.

This has reinforced the argument (and emboldened the political project) that places agriculture as strategic for Brazil’s economic and political power, including in the global sphere. Even in times of crisis, such as the one at the end of the 1990s that led the PT into power and the one in 2014 that culminated in its ousting, agriculture is repeatedly called out and re-endorsed as the logical and best cure.

Among the Left, including among progressive academics, the reliance on natural resources and extractive activities raised hopes and controversies as a way to fund progress and social development during the Pink Tide in Brazil and Latin America. However, the dependence on the export of resource-based commodities for economic growth, known as extractivism, is a historical phenomenon on the continent. Export agriculture has been part of Brazil’s economic history since colonization; it is, therefore, endogenous to the country’s pattern of capitalist development and its unfolding, including its position in the world economy. Chapter 2 delves into the historical and theoretical underpinnings of extractivism in Brazil. Chapter 5 analyzes its most recent manifestation during the PT’s four mandates. The chapter challenges both theoretically and empirically the progressive role of export agriculture, describing its current form as *neoliberal extractivism*. The expansion and reproduction of resource-

based accumulation reflected and reinforced the reliance on a systematic spoliation of state and society to remunerate the owners of rent- and interest-bearing assets.

Chapter 4 discusses the class character of Lula's political project, analyzing the roles of export agriculture in its development model. Exports have enabled Lula's leadership to emerge as representative of interests 'from below' while advancing a political project that protected and nurtured interests 'from above.' The chapter contributes to the theoretical debates on left-wing populism and discusses the achievements, constraints, and setbacks of *Lulism* in Brazil.

The political cycle of the Left started and ended with an economic crisis. Chapter 3 explores the relationship between the expansion of export agriculture following the implementation of neoliberal reforms in Brazil, its role in the country's economic upswing in the 2000s, and the subsequent crisis after 2013-14. It argues that the expansion and relative prominence of the agricultural export sector in the economy was an outcome and a constitutive pillar of the neoliberal accumulation pattern and a manifestation of dependent capitalist development.

Today, Brazil finds itself too far, as much as too close from where it was in the 2000s. The concluding chapter relates the central insights of this thesis with the current context of class struggles and the possibilities for structural transformation.