

Paths of Development in the Southern Cone: Deindustrialization and Reprimarization

by Paul Cooney

1. Introduction

This paper analyzes the current development paths that have been pursued in the two most industrialized countries of the Southern Cone, namely Brazil and Argentina, in recent decades. It has been argued that both countries have been pursuing new developmentalism and yet that which has dominated in reality are the processes of deindustrialization and reprimarization. In order to understand these tendencies and their implications, the specifics of each country are examined. The paper begins with a brief summary of the historical experiences of industrialization in both Argentina and Brazil, followed by a summary of neoliberal globalization and how the roles of the IMF, the WTO, and TNCs, contributed to these tendencies. This is followed by an evaluation of the processes of deindustrialization and reprimarization for both countries and a discussion of their definitions. Moreover, detailed analysis of these tendencies for both countries is carried out for extensive periods.

Section six of this paper advances the discussion of the theoretical concept of accumulation by dispossession by David Harvey and evaluates its relevance in understanding the processes of reprimarization in both Argentina and Brazil. This is carried out through a more thorough analysis of the expansion of primary activities, namely, the sectors of transgenic soy production, cattle, and mega-mining, and analyzing the role of the State and transnationals, through legal and illegal means, in expropriations of local populations.

2. From ISI through Neoliberalism to Deindustrialization

Both Argentina and Brazil were two of the most industrialized countries of Latin America given the history of the transition to ISI from the 1930s through the 1970s and into the 1980s for Brazil. On the one hand, both countries were able to advance through several stages of ISI, though Brazil achieved a more advanced level for a number of reasons. A key difference was the political support historically for a greater role of the State in Brazil, both in terms of industrialization, and its role in the economy overall. In fact, Brazil continued industrializing through the 1970s, during the military government of Geisel, in contrast, after the military coup in Argentina, the government of Videla began the implementation of neoliberal policies, and also the process of deindustrialization.

The specific histories of the arrival of neoliberalism took place at different paces and with nuanced histories. Nevertheless, the onslaught of neoliberal globalization and the hegemony of transnational corporations were such that by the 1990s both countries were on the same track, deindustrializing and well along their way with respect to reprimarization. As is well-known, the IMF encouraged the expansion of debt for Argentina, Brazil and Mexico, leading to increased

industrialization for Brazil and Mexico, but unfortunately to deindustrialization for Argentina. Though the debt crisis was used by the IMF as leverage to force countries to adopt neoliberal policies, in the case of Argentina, it was the military coup of 1976 which facilitated this shift. Unfortunately, after Argentina came out of the dictatorship, the first democratically elected president, Raúl Alfonsín, attempted to pursue a heterodox approach, but was thwarted at every turn by the IMF with neoliberal reforms.

The historical changes which took place in countries such as Argentina and Brazil with the end of ISI, and the shift toward neoliberalism, though with distinct trajectories, resulted in major steps backwards for the processes of industrialization and development for the populations in both countries. The transition towards neoliberal globalization, complicated the conditions for manufacturing industry and industrial workers. For example, the process of trade liberalization strongly impacted the processes of ISI, eliminating or reducing protection and subsidies for national industry and thus exacerbating competition without achieving major productivity gains, or improvements for workers. Another aspect which impacted the manufacturing sector was financial deregulation, resulting in the shifting of the proportion of investment into speculative activities and thus negatively impacting both manufacturing production and employment. Lastly, the push toward privatizations led to major layoffs of public employees, and the selling off of many productive state enterprises to transnational capital.

A key aspect of neoliberal globalization has been the role of transnational corporations and the manner in which they have transformed the processes of production for the whole planet. Associated with the increasing domination of TNCs, there has been the emergence of a transnational capitalist class (TCC), as argued by Robinson (2004).¹ This has been concomitant with the expansion of transnational commodity chains across the globe. Given the imperative to accommodate the interests of TNCs and the new TCC, there has been a decline in terms of the importance or relevance of national industrial policies. Between transnationalization and the implementation of neoliberal policies, there was a clear end to the alternative represented by ISI.

The transformations achieved by TNCs are quite significant when considering the growth of outsourcing, whether in industry or in agriculture. Although outsourcing initially sounds positive for industrial expansion, it implies an increasingly precarious situation, whether for the firms of the periphery or the industrial workers, in free trade zones such as in Manaus or Tierra del Fuego. Therefore, the acceleration of technological change and reduced transport costs facilitated the shifting of production towards countries in the periphery where labor costs and benefits as well as

¹ Robinson argues that there is evidence of an emerging transnational capitalist class, and provides solid empirical analysis for the case of Latin America, for further discussion, see Robinson (2004, 2008).

tax burdens, were much lower or cheaper. The shifting of production also reflected locations where environmental restrictions and regulations were lax or minimally enforced.

The policy of an overvalued currency, whether through convertibility (Argentina) or the highest interest rates in the world (Brazil), reflected the monetarist perspective of controlling inflation and thus wages, in addition to the advantages for an emerging transnational capitalist class. The rate of exchange came to play a key role in the processes of deindustrialization and reprimarization of the Brazilian economy during the decades of the 1990s and 2000s, as will be seen below, but first Argentina is considered.

3. Argentina's Deindustrialization²

Argentina pursued ISI from the 1930s through to the 1970s and in spite of several coups and military governments, achieved some serious advances. For example, from the middle of the 1960s manufacturing goods grew such that they came to occupy two thirds of exports in 1973 (Kosacoff and Azpiazu 1989: 109). However, when the junta came to power in March, 1976, the new government had other plans and the importance of Argentine industry would never be the same. This was evident in the neoliberal economic policies implemented by the junta with the new Economics Minister, Martínez de Hoz. A major goal of the military government was to shift their support away from manufacturing industry and towards agribusiness. It was argued that the rent from agriculture, principally from cattle and grains, would be used for the development of agribusiness instead of subsidizing the less efficient manufacturing industry.

When referring to deindustrialization, it constitutes the decline in manufacturing industry, which is distinct from agribusiness (or agroindustry) and mineral extraction, which is often seen as industrial, though not manufacturing. In fact, the term is misleading since industry can be seen as not just including manufacturing, but also agribusiness and mining. However, it is the historical shift away from manufacturing (which tends to be associated with industrialization) and a return to the domination of the primary sector. The definition of the term reprimarization used in this paper is the shifting of the motor of the economy away from manufacturing back to the domination of the primary goods sector. Even though the processing of raw materials, such as soy, wheat and other cereals and grains, correspond to industry, they are clearly an extension of the primary good sector and thus reflect its current domination. It is important to note, that they generate more value added than many other agricultural and extractive activities, in general.

Thus, when referring to reprimarization, it is the overall shift away from manufacturing industry (industrialization) and toward the economic base of the primary sector. Therefore,

² For a more detailed discussion of the analysis of deindustrialization in Argentina, see Cooney (2007).

technically, the milling and grinding of soybeans is officially industrial, but is considered to be a part of the extended primary goods sector, and in this sense, its expansion is constitutive of reprimarization. Evidently, one has to examine and to continue paying attention to the trends of value added, as well as the treatment in terms of tariffs and trade treaties of these different categories, but when the term reprimarization is used, it is referring to a general trend away from manufacturing industry (associated with industrialization, be it the center or the periphery) and once again toward the domination of the primary sector and related activities.

In Argentina, three principle factors can be identified as key in the shift away from manufacturing toward agribusiness during the 1970s. In summary, they were: (1) the change in alliances, away from the industrial bourgeoisie and a shift back to the landowning oligarchy, but now more modernized and fused with transnational agro-industry and finance, the latter often referred to as the *patria financiera*,³ (2) the obsession on the part of the junta in eliminating the worker's resistance in general, even if this meant eliminating the industrial park in Argentina, given its association with concentrated organized workers and unions;⁴ and (3) accommodating large capital, including foreign TNCs, the latter preferring Argentina to concentrate on primary goods production and leaving industrial activities, such as automobiles, steel, and heavy industry to foreign TNCs operating locally.

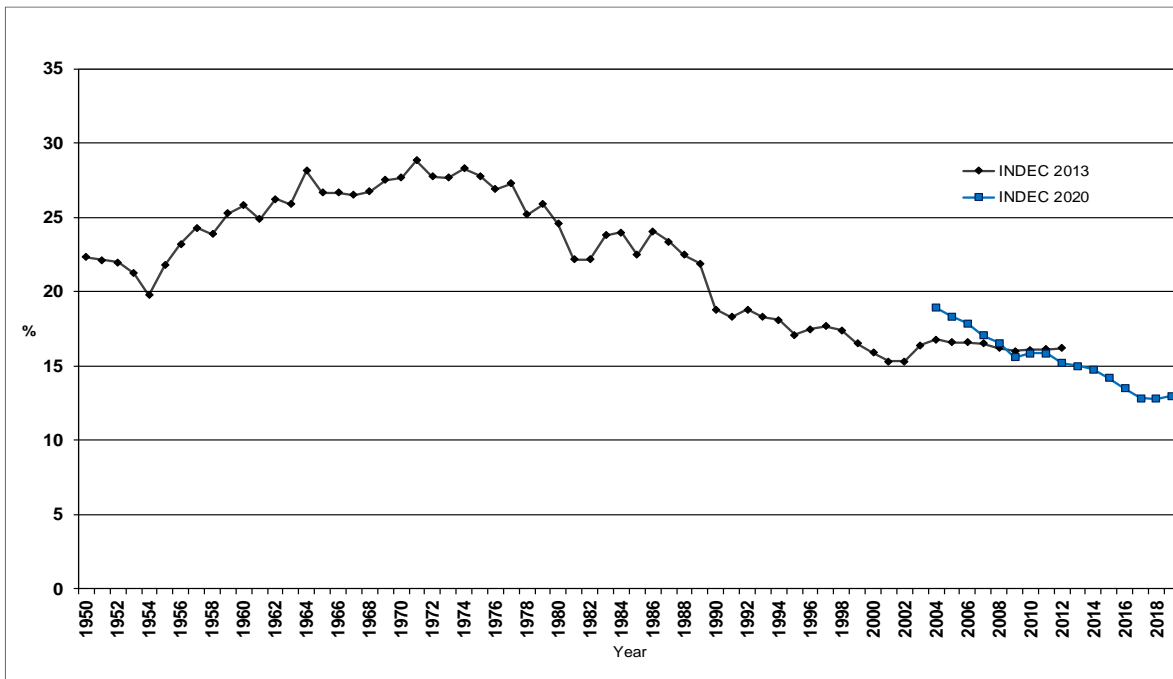
Summarizing the process of deindustrialization, the military dictatorship clearly had a very negative impact on Argentine industry, especially the manufacturing sector. In Figure 1 below, it can be observed that the highest value of this series was almost 29% in 1971, and that prior to the dictatorship it was approximately 28% and during the military government this declined to 22% by 1981. Moreover, industrial employment also experienced a drop of more than 26%, and industrial production as a whole dropped 17% (Smith 1989: 251-264). This constituted the first wave of deindustrialization in Argentina, while the second wave occurred during the government of Menem, when industry declined from roughly 22 to 15% in terms of GDP, and manufacturing jobs declined by 32.6%, from 1,132,499 to 762,992 between 1991 and 2001. (INDEC 2013)

Given INDEC's data problems the data from the first series (INDEC 2013) will be considered valid through till 2009, and afterwards the INDEC 2020 series, since it extends further, will be referred to. The upshot in terms of a trend in the decline of manufacturing as a percentage of GDP is that after a maximum of roughly 29% in 1971, it has fallen by more than half to a value of 13% in

³ The *patria financiera*, is a term referring to the concentration of financiers, which over time came to have increasing links to agribusiness.

⁴ Most notable was the memory of the strikes and popular uprisings, such as the confrontations in 1969 in Córdoba (*el Cordobazo*), Rosario, Tucumán, etc. at the end of the 1960s and the beginning of the 1970s.

Figure 1: Manufacturing Industry as a % of GDP, Argentina 1950-2019.⁵



Source: INDEC, 2013, 2020.

2019. The upshot in terms of a trend in the decline of manufacturing as a percentage of GDP is after a maximum of roughly 29% in 1971, it has fallen by more than half to a value of 13% in 2019.

The factors contributing to a significant decline in manufacturing from when Menem took office in 1989 through till the crisis of 2001, were the overvalued peso during the period of convertibility, high rates of interest, implying greater costs for industrial firms and the pursuit of free trade policies instead of a national industrial policy. After the depression of 2001-2003, between destroyed capital and extremely low wages, during the government of Nestor Kirchner, industry recovered, and based on the data above, the manufacturing percentage increases by at best 1.5%. There was significant debate whether or not the Kirchners' governments were promoting manufacturing industry or not, and it appears to have improved till 2008 and then worsened.

4. A Difficult Trajectory for Brazilian industry at the outset of the 21st Century⁶

In the first decade of the 21st century, Brazil evinced an image of a complex emerging economy, constituting the sixth largest economy worldwide, in terms of GDP. Nevertheless, the fact that the manufacturing sector was declining in terms of GDP since the mid-eighties, points to the fact that globalization was producing significant changes in the productive structure. This also reflects policy changes made in the decade of the 1990s and which continued into the first decade of

⁵ Because of data problems at INDEC, two series are presented in this figure: the first series (INDEC 2013) ends in 2012, while the second series (INDEC 2020) only begins in 2004 but extends through 2019.

⁶ Portions of the text in this and the next section derive from the following publication, which is useful for further analysis of the process of reprimarization in Brazil (see Trinidad et. al., 2016).

the new century. Overall it is indicative of the transformations that have been taking place across the globe as the result of several decades of neoliberal globalization.

The historical presence of international capital in Brazil, primarily in the form of foreign direct investment (FDI), has constituted an important aspect in the formation of Brazil's industrial park. The presence and inflows of foreign capital into the Brazilian economy, was particularly accentuated during the 1990s, especially after the implementation of Cardoso's *Plano Real*. In large part, this was a result of the drive toward privatization of public enterprises in important sectors of the economy, such as in mining and telecommunications. According to Gonçalves (1999: 15), the participation of foreign capital, in terms of the value of output, increased from 10% in 1995 to roughly 15% in 1998. The increased role of foreign capital is evident when considering the major increases of foreign direct investment: from US \$2.1 billion in 1994 to US \$10.8 billion in 1996; more than quintupled in only 2 years and later reaching US \$34 billion in 2007, generating significant financial fluctuations in the Brazilian economy (See Rocha 2002).

The consequent denationalization of the Brazilian economy resulting from the large presence of TNCs, and combined with WTO restrictions regarding subsidies and protection, reduced the capacity for Brazilian industry to compete and also increased the external vulnerability of the Brazilian economy. As observed in the previously mentioned work (Gonçalves 1999: 177-190), the weakening of the Brazilian productive base was partly caused by accommodating foreign TNCs, especially through privatizations. Thus, instead of providing new productive investment as a result of FDI, there was only a transfer of ownership of previously existing state assets to foreign transnationals. Therefore, the productive base came to be managed according to the logic of global productive efficiency, namely decisions aimed at reinforcing the networks of global capital, not in the interests of national industry.

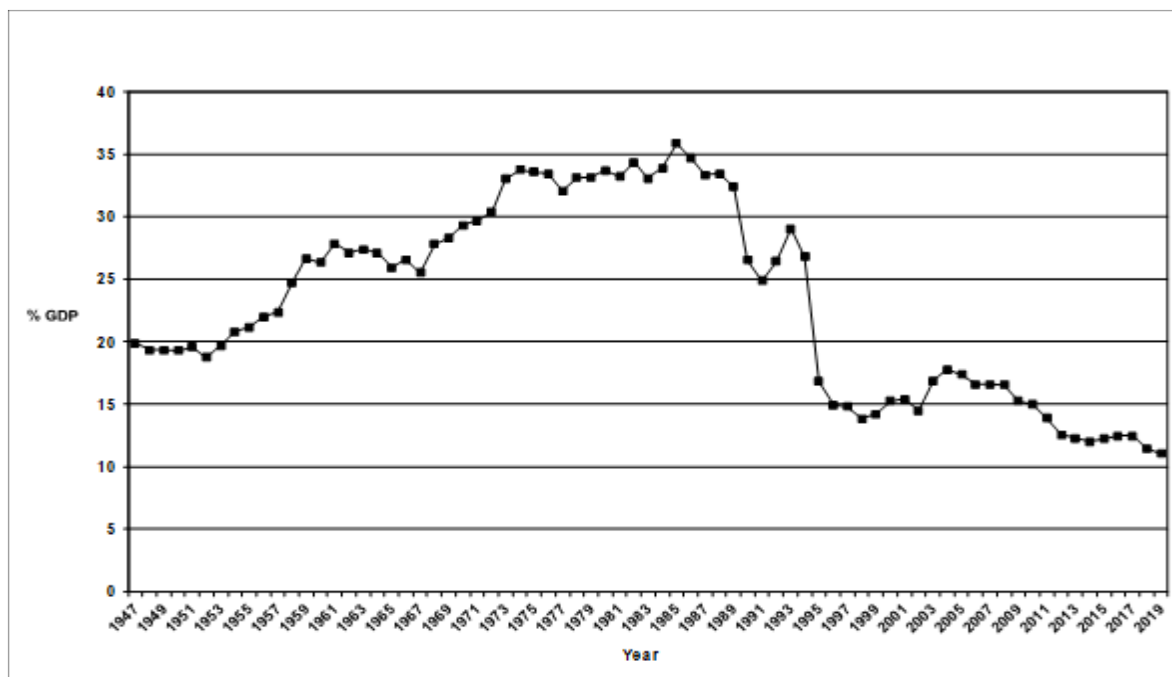
Another key aspect to consider is the growing presence of agribusiness and extractive sectors in Brazil; this tendency dates back to internal shifts in the early 1990s, but also reflects the institutional changes, such as the increased role of the WTO. There have been a number of important measures adopted and also instruments employed which accommodated agribusiness in recent decades. In particular, there has been significant use of rural credit for investments in agricultural mechanization and research oriented towards the production of grains and seed oils in the Brazilian Cerrado, carried out by the state enterprise Embrapa.⁷ There has also been a strengthening of the agribusiness chain linked to the food and beverages sector, and this is supported by the export profile for the decade of the 2000s, as shown below.⁸

⁷ *Embrapa (Empresa Brasileira de Pesquisa Agropecuária).*

⁸ For the debate on agribusiness and recent developments see: Bunker (2004), IPEA (2012) and Silva et al. (2012).

There is a general sense that after several decades of industrial growth, Brazil became a clear leader and industrial powerhouse of the region and that it is still viewed as the strongest industrial economy of Latin America. However, there has been a growing discussion regarding Brazil's deindustrialization in the past as well as in the present. In this sense, it is important to examine one of the prevalent measures of deindustrialization, namely the value added in manufacturing as a share of GDP in percentage terms. Brazil's manufacturing industry achieved its maximum percentage of GDP, in terms of total output, in 1985, at almost 36%, reflecting the impact of the 2nd National Development Plan (II PND), as discussed in Chapter 2. This Plan was the last significant effort during the ISI period for employing government planning in the formulation and implementation of development policies and actions, giving special importance to the coordination of industrial policies and complementarities of productive chains.⁹

Figure 6.2 Brazilian Manufacturing Industry, (% GDP), 1947-2019



Source: IBGE/SCN, 2020.

Figure 6.2 presents the contribution of manufacturing value added as a percentage of GDP. The highest level attained was 35.9% in 1985, followed by a downward tendency bottoming out at roughly 14% in 1998.¹⁰ This was followed by a slight recovery to almost 18.5% in 2004, but then falling in recent years, dropping to 12.55% in 2012, and currently in 2019 down to 11%.

Shall we conclude that this tendency demonstrates a permanent process? Not necessarily. Since transformations in several sectors have been significant there has been growing concern about

⁹ For an analysis of these aspects, see Castro and Souza (1987) and also Carneiro (2002).

¹⁰ Due to a methodological change in the IBGE series in the year 2008 there is an inconsistency in the data and this is reflected in the significant drop in the series between 1994 and 1995.

the direction of industry going forward. However, it would only be through the establishment of a well thought out industrial policy that the present trajectory could be changed. Evidently, there is concern over Brazil's current export profile, and the nature and level of their current integration with China, reflecting the selling of primary goods in return for importing manufacturing goods. In addition, there is a great level of uncertainty with respect to the current economic situation for the global economy at present, given the COVID-19 pandemic.

The current trajectory is a result of the structural changes which the Brazilian economy experienced since the end of the 1980s and specifically the framework established by the global neoliberal order since the 1990s, reflecting a particular type of insertion in the world economy: mainly as producer and supplier of primary goods with low value added. The necessary change to this pattern is fundamental for a new type of insertion of Brazil in the global economy, in order to avoid continuing along the path of dependent development with increased external vulnerability and recurring crises.

Unfortunately, this tendency is arguably a third phase of dependency, constituting another shift, but this time moving away from industrialization and expansion of manufacturing toward agribusiness, distinct from that of an economy dominated by agro-exports, though once again with the domination of primary production and a few related industries that produce some improvement in value added, such as food and beverages. This same sector was key in the transition from just agricultural exports, namely coffee, sugar, rubber etc. in the 1930s, toward industrialization. The unfortunate reality is that this is the sector of industry with the largest percentage of production and employment even though we are approaching 100 years since the earlier phase, when this was also the case. However, as discussed in detail for the case of soy further below, the agribusiness sector is also dependent on a greater foreign presence, as in inputs for agriculture, be it the transgenic seeds, fertilizers, pesticides, hormones, etc. and soy harvesters. The upshot is that less of the differential rent associated with these primary activities stay in Brazil (or Argentina) and especially given the tendency of the emerging transnational capitalist class, this implies that the orientation of Brazilian capitalists and elite are looking more and more outward, not inward as compared to the ISI period.

The tendencies of deindustrialization witnessed for both Argentina and Brazil, though for distinct time periods, have contributed toward an overall tendency of reprimarization. The next section elaborates on the specifics of these shifts for both countries and identifies the factors that have been crucial, from the amazing growth of China and their demand for raw materials to the roles played by TNCs and the WTO.

5. The Current Tendency toward Reprimarization in Argentina and Brazil¹¹

During the first decades of the 21st century, the *commodities* boom could be seen as a great advantage in terms of capacity for countries to export agricultural products, minerals and other raw materials. The dynamic of growth of both the agribusiness sector and other primary good sectors, such as minerals and petroleum, constitute the reprimarization of both these economies. On the one hand, it can be argued that Argentina actually began this process at the end of the 1970s, while Brazil made structural changes starting at the end of the 1980s. In addition to both countries adhering to the framework of neoliberal globalization, these processes are also clearly a result of the lack of options, that come as a result of the rules regarding protection and subsidies to which they must adhere as members of the WTO, which have been in effect since 1995, when both countries entered the organization. The upshot is that in general, independent industrial policies, fomenting local industry in a serious way, are no longer feasible for countries of the periphery. The possibilities of competing in manufacturing at a global level have changed significantly, between the WTO framework and major advances in productivity.

Very much related to the WTO control is the need to accommodate transnational capital and thus fit into the global value chains of TNCs. The latter dominate the industrial and development policies of both countries, in part, as a result of the increasing role of the transnational capitalist class, whether that involves foreign investors, Argentines or Brazilians. Given the transnational dimension of the economic interests of local politicians, it can be argued that current governments accommodate TNCs more than their own national companies, as opposed to the traditional national interests associated with the ISI period (Robinson, 2004), and this is not just the productive sector, but also with respect to the financial sector.

For both countries, a major concern is the increased degree of dependence of the economy with respect to agribusiness, mining and other extractive sectors, and at the expense of the manufacturing sector. In this sense, the rates of growth for the primary sectors have been higher as a result of the commodities boom on world markets in the last decade or so. For many countries, their relation with China was the most notable change of trade relations since the beginning of the 21st century, especially for the continents of Africa and Latin America. The two cases of Argentina and Brazil experienced a very strong growth of trade with China during the last decade, and China continued as the primary trading partner of Brazil in 2019, and as the second most important trading partner for Argentina.¹²

¹¹ See Trindade et. al. (2016) and Cooney (2016).

¹² By 2012, China became the primary trading partner for Brazil for both imports and exports and is the second most important trading partner for Argentina for exports, and third for imports. (Slipak 2014, 49).

China is interested in securing the supply of a range of raw materials and in order to achieve this they are insuring solid trading partners, such as Brazil and Argentina. Moreover, China is providing loans and expertise for infrastructure projects in addition to purchasing lands and brokering development projects, reflected in deals and treaties with Brazil and Argentina, such as in July 2014. Their main interest is obtaining control over primary products: soy and related products, beef, and other food products, petroleum, natural gas and several minerals, etc. The concern of this development is that the two countries are orienting themselves so as to concentrate growth in the raw materials sector more and more, and secondly in the industrial sectors with low technological content and based on natural products, such as the food and beverage sector.

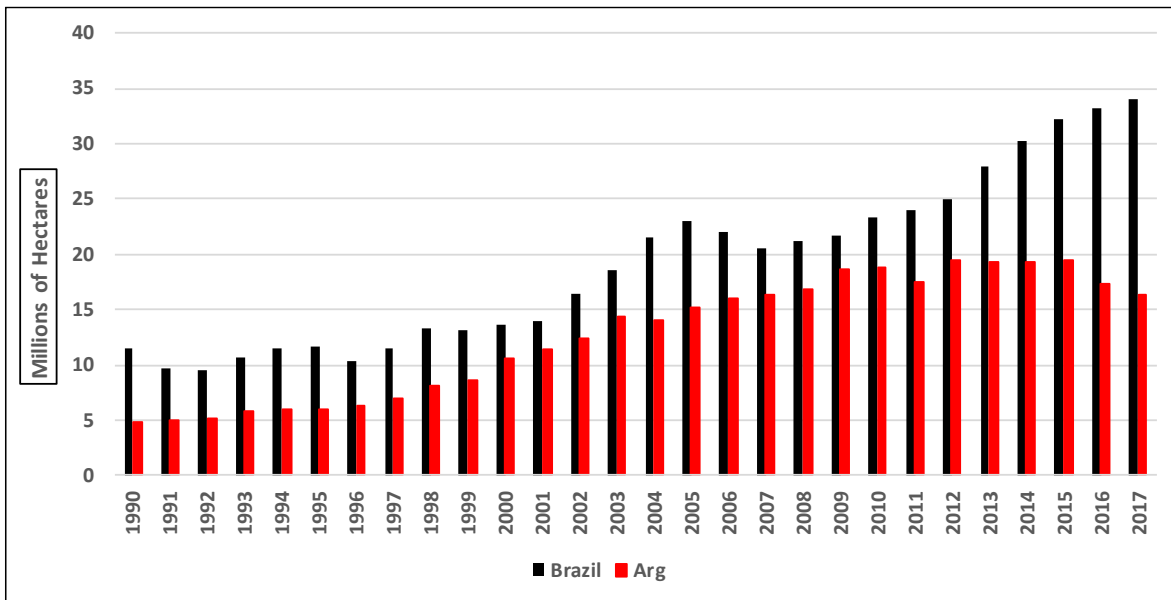
The Brazilian manufacturing sector with the most growth and dynamism in recent decades is the food and beverages sector, which grew almost 280% during the period 1996-2007, in absolute terms, and generated more manufacturing employment: reaching almost 21% of all industrial employment in 2006. In the case of Argentina, the food and beverage sector has had the largest levels of total investment for the period 2003-2010, reaching 23.62% of all industrial investment in Argentina. There has been less consistent growth since the crisis of 2008-2010 subsequent recessions, but given the reprimarization tendency it is expected that the food and beverage sector will continue to be the most dynamic industrial sector going forward, and most likely even through the COVID-19 crisis.

Soy in Brazil and Argentina

The expansion of seed oils (*oleaginosas*) and in particular, soy, has been emblematic of the tendencies of reprimarization. In Figure 6, it is quite evident how significant the expansion of soy has been for both Brazil and Argentina. The expansion of the area harvested of soy in Brazil grew an impressive 284% for Brazil between 1991 and 2019, and in the case of Argentina the growth was 231% between 1991 and 2017, with maximums of 29 million hectares in a year for Argentina and almost 37 million hectares in 2019 for Brazil. This shows why they are two of the primary producers and exporters of soybeans and derivatives at present.¹³ In terms of genetically modified soybeans, in Argentina they constitute practically 100%, while in Brazil it is 96% or more.

¹³ As of 2018, Brazil was the second largest producer of soybeans with 31.6% of world production and Argentina was 3rd at 14.8%, and the US was still in 1st place producing 34.3 % of total production. In terms of exports, there are several different products, but the largest exporter is Brazil, followed by the US and with Argentina third.

Figure 3: Area Harvested for Soy in Argentina and Brazil: 1990-2017 (millions ha)



Source: IBGE/PAM, 2020; INDEC/INTA, 2020.

Soy, Pesticides and GMOs

The famous Green Revolution began in the late 1960s, and is associated with the introduction of new varieties of grains, cereals and seed-oils and biotechnology was key for a number of crops, including soy. The shift toward a more intensive use of biotechnology reached a more mature stage in the 1990s. This was with the introduction of a technological package including genetically modified zero-tillage seeds (GMOs), more agrochemicals, such as fertilizers, pesticides and herbicides (Teubal, 2006), especially glyphosate. In Argentina, this shift led to a significant replacement of cattle for soy and wheat, especially the former and the increasing role of the ever more dominant GMOs and toxic cocktails.

The genetically modified seed “Roundup Ready” is a variant of a soybean seed particularly resistant to glyphosate. As a result, the intensive use of RR “*zero tillage*” seeds increased productivity and reduced the level of erosion initially. According to AAPRESID- “This change to no-tillage planting was very rapid: from representing less than 25% of the area planted in 1997, it came to represent almost 80% in 2011, reaching levels nearing 100% in provinces such as Santiago del Estero, Salta and Corrientes” (AAPRESID 2012). The growing expansion of zero tillage, the transgenic seeds and pesticides increased land concentration in Argentina significantly: 82% of the producers occupy only 13% of the land, while 4% of the large producers occupy 65%. As of 2011, six major export companies dominate all the value chain production of soy and 50% of the lands are in the hands of 2% of the property owners (CIFRA, 2011). The growing dynamism of no tillage transgenic seeds and pesticides created a productive agrarian structure even more strongly concentrated, as much in terms of property as in terms of production.

A key factor is the transnationalization of inputs, in which a small clique of TNCs achieved consolidation as providers of seeds, fertilizers, and pesticides and thus capturing an increasing portion of the ground rent generated by such activities, and derived from the higher fertility of the soil of the pampas. In spite of its importance, a more extensive analysis of the details of ground rent for soybean production will not be elaborated here,¹⁴ nor the process by which a portion of agrarian rent is captured, but it is imperative to mention that as a result of the growing use of agrottoxics, the Roundup Ready transgenic seeds, “no-tillage” machines, etc. there is an increasing and not insignificant proportion of agrarian rent, previously retained locally, now being passed on to the TNCs. This has fundamental implications with respect to the control of surplus value and the possibilities of sustainable development in the future. Two other sectors which are also classic examples of ground rent and in which the differential rent derives from the conditions of the subsoil rather than the soil itself, are mining and petroleum extraction.

The deregulatory climate of the 1990s saw an increasing presence of transnationals and consolidations in the global food industry. In the case of Brazil this was primarily in the food retail sector and the poultry, beef, and soy processing industries, with beef and soy having particular significance for the Amazon. Wilkinson (2009) observes the major role that TNCs have played in the increased centralization of the soy processing industry: for example, global agribusiness giant Bunge purchased Ceval, which since 1986 has been Brazil’s largest soybean processor, while U.S.-based Archer Daniels Midland (ADM) took over the soy processing operations of Perdigão and Sadia, two Brazilian meat processing companies that merged in 2009 to create Brazil Foods, a TNC in its own right that is said to rival major U.S. transnational agribusiness firms.

As a result, Wilkinson (2009) notes that the majority of the country’s soy crushing and trade is now in the hands of the four leading global players: ADM, Bunge, Cargill, and Dreyfus, known as the ABCD of cereals and grains, and which in recent years have increased their influence and size considerably. In the seed industry of Brazil, the dominant TNCs are Monsanto (Bayer), Syngenta, and Dupont industry, a fact that is quite pertinent for the soy industry, where genetically modified seeds now account for roughly 97 percent of production.

These TNCs are playing the same role in Argentina, where the ABCD group is trying to dominate, although they are needing to compete more with China, whose influence continues to grow in both Argentina and Brazil. In fact, according to Haro Sly (2017, p. 8) “As China has become a global player in genomics and agrochemicals, that is, buying Nidera, Syngenta, Atanor, producing 40% of the world supply of generic glyphosate”. These developments evidently put additional

¹⁴ For further discussions of ground rent in the cases of agriculture, mining, etc., see Trindade and Cooney, 2017.

pressure on chemical companies, such as Bayer/Monsanto among others in the field of agrochemicals.

The concern over reprimarization increases the more that Argentina is dependent on China and this is reflected in both China's policies and attitude. In addition, 68% of Argentina's exports to China are concentrated in soy and its derivatives. As could be expected, China is primarily exporting manufactured products to Argentina and glyphosate is one of the leading imports from China, and this is clearly linked to Argentina's reprimarization tendency (Haro Sly 2017: 8). In 2007, Argentina still had a trade surplus with China, however minor, but since then it has been negative and worsening, totaling (-24 US \$ billion) between 2007-2014 (Oviedo 2015: 121), and when Argentina pushed to export crushed soy, China refused, preferring to import just soybeans or cakes (raw materials) and therefore the crushing (manufacturing) would be done in China, which involves much more value added; insuring Argentina knows its place in the global commodity chain!

In addition to the decline of manufacturing industry and the strong growth in primary activities, such as soy, mining and petroleum, the reprimarization tendency has been clear for Argentina in terms of their export profile. It is worth recalling that roughly 67% of their exports were manufactured goods in 1973. In contrast, in 2016, the top ten items exported constitutes 56% of all exports and among these, primary exports (soy products, wheat, corn, beef and seafood) came to a total of 46%, and thus only 10% corresponded to manufactured goods (Schorr and Ortiz 2018: 84). This is a ratio of almost 5 to 1 in favor of primary products to manufactured goods. A comparison with exports in 1973 clearly shows the degree which Argentina has experienced reprimarization. In the next section, the expansion of soybeans in Argentina is further examined, given its increased role within the Argentine political economy. In fact, due to limited fertile land in Argentina, compared to Brazil, cattle have been increasingly compromised by the expansion of soy.

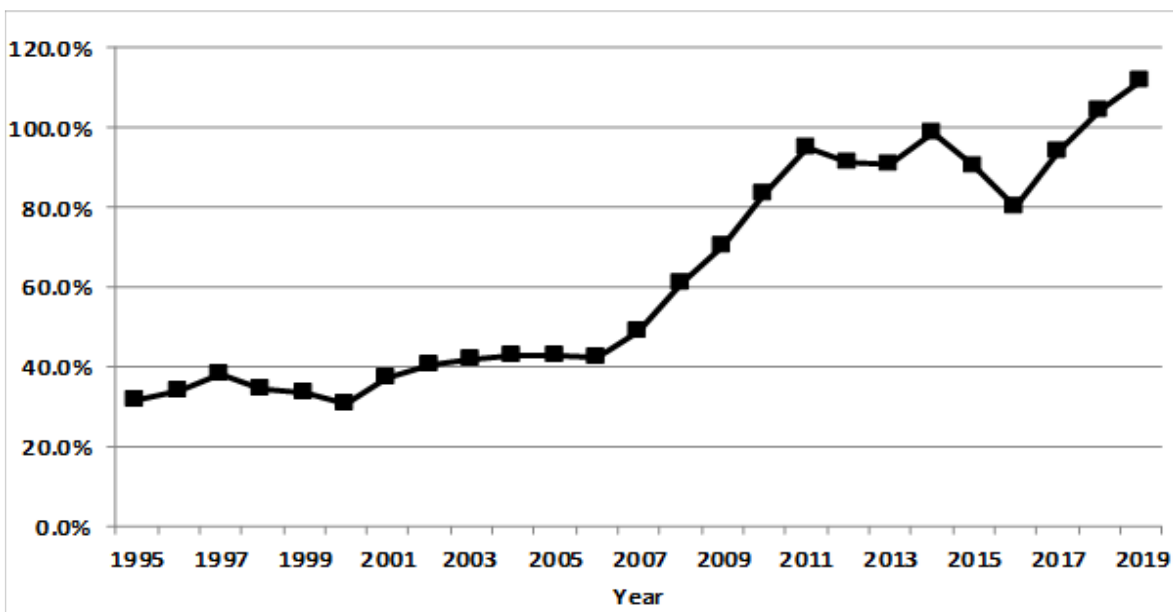
In Brazil, the primary expansion of cattle has been in the Amazon, although the beef is not the highest quality. Therefore, the lower quality beef is sent (exported internally) to the south and southeast of Brazil, while the higher quality cattle from the south (e.g., Rio Grande do Sul) is exported. The available territory for both soy and cattle in Brazil is substantially more than that available in the fertile region of the Pampas (*Pampa Húmeda*), although there has been a number of provinces outside this region, such as the Chaco. Recently, there has also been an expansion of soy in new regions in the north and northeast of Brazil, referred to as Matopiba and is composed of the states Maranhão, Tocantins, Piauí and Bahia.

For more than twenty years, there has been an increase in the ratio of primary goods compared to manufacturing goods in Brazil's export profile. Solid evidence of the reprimarization

tendency in the Brazilian economy is provided by Figure 4 below, which presents the ratio of primary exports in relation to the percentage of manufacturing exports. Since 1995, the ratio of primary to manufacturing exports grew from roughly one third to one in 2014, the greatest acceleration taking place since 2007. Since 2014, the exports of primary goods dropped for a couple years and then rebounded as of 2016 and reaching a ratio of approximately 1.1 in 2019, as primary exports have now surpassed manufacturing exports. Moreover, the changes in Brazil's export profile is evident when one considers that during the period of ten years (1999-2009), exports grew roughly 318% overall, while exports of primary goods grew at 525%.

Having observed the shifts in terms of production and exports for both Argentina and Brazil, in this section, the evidence was arguably clear regarding the reprimarization tendency. The next section examines reprimarization in the context of the discussion of accumulation by dispossession, considering a number of concrete examples. In particular, the expansion of cattle, soy and mining in the Brazilian Amazon is examined, as well as the expansion of mining in Argentina.

Figure 4: Primary to Manufacturing Exports (%) (Brazil - 1995-2019)



Source: MDIC, 2020

6. Reprimarization and Accumulation by Dispossession

In this section Harvey's concept of accumulation by dispossession is evaluated in terms of its relevance in the context of reprimarization in the Southern Cone, namely for Argentina and Brazil. As described above, the tendency toward reprimarization is concentrated in a number of key sectors, namely soybeans, and derivative products, minerals, including gold, copper, aluminum, among others, fossil and biofuels, the lumber industry, agribusiness, including soy, livestock, etc. Prior to

examining specific cases in Argentina and Brazil, a discussion of Harvey's concept of accumulation by dispossession is first presented.

The Concept of Accumulation by Dispossession in Harvey

In Harvey's book, *The New Imperialism*, he derives a new theoretical term clearly linked to Marx's category of original accumulation. He cites Luxemburg and Arendt, who both argued that this concept is relevant in analyzing historical transformations involving major dislocations of populations and the privatizing of the commons, and thus crucial for our understanding of accumulation in modern capitalism. As Harvey points out, the transformative processes involving fraud, pillage, and violent uprooting of thousands of freeholders, as in pre-capitalist England, continued to exist well beyond the establishment of capitalism in many parts of the globe and through to the present day. Harvey further argues for the need to analyze those historical processes that do not fit into a strict economic interpretation of capitalism's functioning. In the following citation, Harvey introduces the new concept of accumulation by dispossession:

A general re-evaluation of the continuous role and persistence of the predatory practices of "primitive" or "original" accumulation within the long historical geography of capital accumulation is, therefore, very much in order, as several commentators have recently observed. Since it seems peculiar to call an ongoing process "primitive" or "original," I shall in what follows substitute these terms by the concept of "accumulation by dispossession. (Harvey 2003, p. 144)

Harvey argues that Marx's analysis of original accumulation includes a "wide range of processes," in particular, "the commodification and privatization of land, and the forceful expulsion of peasant populations...suppression of rights to the commons." Harvey goes on to include in his concept, contemporary and current forms of accumulation that operate 'extra-economically'. Among these current forms, Harvey identifies methods that do resemble those described by Marx in *Capital*, and others that do not:

...the commodification and privatization of land and the forceful expulsion of peasant populations; the conversion of various forms of property rights (common, collective, state, etc.) into exclusive private property rights; the suppression of rights to the commons; the commodification of labour power and the suppression of alternative (indigenous) forms of production and consumption; colonial, neo-colonial, and imperial processes of appropriation of assets (including natural resources); the monetization of exchange and taxation, particularly of land; the slave trade and usury, the national debt, and ultimately the credit system as radical means of primitive accumulation. (Harvey 2003, p. 145).

However, he argues that in recent decades, with the implementation of the neoliberal project, the methods of accumulation by dispossession have multiplied and diversified, leading to a "new wave of enclosure of the commons" (Harvey 2003, p. 148). Nevertheless, for the purposes of the

analysis in this paper, we are concentrating on the expropriation of populations for the purpose of activities associated with reprimarization.

The Role of the State

The expropriation of peasant and indigenous populations is another way of acquiring at a very low price, large tracts of land, whose control is essential for the implementation of -for example- extractive mega-mining or petroleum projects or access to land necessary for major agribusiness expansion, such as soy, cattle or other agricultural products. Along with Marx, Harvey highlights the importance of the role of the State in these processes, as it provides political, financial, military, judicial and moral support to the accumulation of capital through dispossession, and argues that the state, which has both a monopoly of violence but also dictates laws and whether or not to enforce them was crucial for the establishment of capitalist relations and continues to be so for the continued expansion of capital across the globe.

Accumulation by Dispossession and the Amazon¹⁵

One of the areas where accumulation by dispossession is arguably quite relevant in Brazil is the Amazon Rain forest. The principal activities associated with these processes at present are mega-mining, soy and cattle ranching, where TNCs have been operating since the end of the 1950s. Moreover, major transformations have taken place as a result of the expansion of soy and livestock farming, beginning with the military dictatorship during the 1970s and 1980s. During this period there was an effort made by the Brazilian State to promote the migration of large landowners toward the Amazon, and also for migrant workers from the Northeast of Brazil arriving in search of work (see Bunker, 1985) and then producing the problematic phenomenon of *grilagem* (see below). In the discussion below it will become evident that these processes of accumulation by dispossession have clearly paid off for the elite and the Brazilian State; after several decades of the expansion of soy, cattle and mining, there has been an extraordinary amount of rent and profits extracted from the Amazon.

In any event, many of these changes through to the present day unfortunately involve the use of force and violence. As Marx pointed out, “In actual history, it is a notorious fact that conquest, enslavement, robbery, murder, in short, force, play the greatest part [in enforcing property rights].” In other places and periods, existing property rights are often not enforced but ignored, and new rights are established in favor of the dominant classes, be they feudal lords, slave owners or Amazonian *fazendeiros* (plantation owners).

¹⁵ For further discussion of accumulation by dispossession in the Amazon see Rivero and Cooney (2010).

The current processes of expansion in the Amazon does not correspond to original accumulation in the strict economic sense that Marx wrote about for pre-capitalist England, but it does clearly fit with the concept of accumulation by dispossession as elaborated by Harvey, because the historical processes involving expropriations of populations through violence and fraud, result from the needs of capitalist accumulation. This is true whether the capitalists need wage laborers for agricultural production or simply want control of the land for production purposes and/or speculation. The transformation taking place in terms of dominant social relations of production in the Amazon is forcing large numbers of peasants or riverine people to move to the city and become informal laborers. The upshot for them is a transformation of the relations that had previously dominated them and their families' lives.

The Military Government (1964-1985) and Policies of Expropriation

After the coup of 1964, the military government implemented several policies and initiated major projects aimed at transforming the Amazon in order to lay the groundwork for an enormous expansion of agriculture, cattle production, and mining. The Brazilian government set up SUDAM (the Development Authority for the Amazon), which provided major fiscal incentives to landowners and capitalists from other parts of Brazil, mainly from the states of Goiás and São Paulo. The military government encouraged the migration of peasants from the Northeast states and the south/southeast, in part to ameliorate serious land conflicts, which had been taking place from the end of the 1950s. The result of these migrations, combined with shifts of local Amazonian populations led to a new structure for the peasant populations, namely that of family agriculture.

The fiscal incentives and profits resulting from increases in land prices generated extra profits for landowners, which initiated new patterns of land use, mainly low-productivity ranching. The logic of such investments was to open the forest to make pastures not simply for cattle production itself, but to appropriate the land as well, and therefore obtain the rents and gains associated with incentives, subsidies, and land prices. Though the newly created pasture could only support low occupation rates (much less than 1 head/hectare), prices for occupied land rose rapidly, producing speculative gains for the landowners, which permitted the expansion of more capitalized agricultural production in the ensuing decades.

As mentioned above, from the end of the 1960s throughout the 1970s, a large number of capitalists and landowners took advantage of the incentives SUDAM offered and moved from the states of São Paulo and Goiás to the Amazon, mainly to Mato Grosso, Pará, and Rondônia. This migration combined with a migration of landless peasants had a significant impact on the region. For example, in 1991 Mato Grosso had the sixth largest migrant population in Brazil, Pará had the eighth largest, and Rondônia the ninth largest. In 1991, over 62 percent of the population of Rondônia had

been born in another state; for Mato Grosso this proportion was roughly 46 percent, and for Para, 18.43 percent.

One of the main mechanisms SUDAM used in its fiscal incentives was *grilagem*, the usurpation of lands by generating land titles, which trumped any legal claim by those who had occupied and worked the land previously. Thus, expropriation came about through the migration of capitalists and landowners from the south, who were given a title through corruption of the land title authorities (*cartórios*) or INCRA (the Institute for Colonization and Agrarian Reform), which was allegedly “regulating” land titles. Many of these large landowners and capitalists—often recent migrants to the Amazon—claimed that no one before them had a title for a specific piece of land, and therefore it was now theirs, even if a family had been living there for generations. This “legal” usurpation also gave them the right to forcibly remove the occupants (*posseiros*) or indigenous groups that had been occupying the land. This necessarily involved a significant amount of violence and was often done by *jagunços*, henchmen hired by the private landowners. In several regions, such as Mato Grosso, the violence was characterized as genocide of indigenous groups (see Oliveira 2005). The government also at times employed the army for the expropriation of peasants and indigenous populations.

Given the fact that around 70% of land use is pasture, ranching is the main deforestation driver in the Amazon. In addition to deforestation, ranching leads to increased pasture, worsening the problem of soil lixiviation- the separation of nutrients from the base soil. Thus, cattle ranching exacerbates the problem of soil impoverishment more than other agricultural practices. The Brazilian government’s subsidies and incentives for cattle ranching gifted the new landowners with huge profits. Cattle ranching has also been attractive for small farmers, who saw cattle as a low-risk asset.

Agribusiness, Accumulation and Dispossession

At the end of the 1980s, the production patterns of the Amazon region started to change, with a rapid growth in capital-intensive agriculture, particularly soy plantations. From 1990-2007, the gross value of soybean production in the Amazon region grew by 21 percent per year, while cattle herds were growing at rates of 7 percent per year. The combination of the expansion of ranching and soy is a qualitative advance compared to the previous frontiers of colonization and land speculation. Both cattle and soy are strongly integrated with global markets and are far more capitalized than the other activities that dominated the region up through the 1970s and 1980s. In summary, the processes of accumulation by dispossession fomented by the military government laid the groundwork for a qualitatively new phase of capital accumulation, which is analogous to original accumulation, insofar as what followed constituted the establishment of full-fledged capitalist production for the first time in the Amazon. Thus, this constitutes a new phase of capitalist accumulation in the Amazon.

In terms of cattle expansion in the Amazon, between 1990 and 2006, cattle herds in the Amazon grew at an annual rate of 6.74 percent compared to an average annual growth rate of just 0.57 percent for the rest of Brazil. Most of the growth in Brazilian cattle—an increase of more than 180 percent in 16 years—occurred in the Amazonian states of Mato Grosso, Rondônia and Pará, where deforestation is greatest. Evidently the growth of domestic and foreign demand for beef, is a key factor explaining expansion, it is also influenced by other factors, such as the continual reduction in transportation costs, increases in productivity, and the relatively low price of land in the Amazon.

The highly capitalized soybean plantations represent a new pattern of production that is very different from the traditional agriculture practiced by small producers (*colonos*). The area of soybean plantations accounted for roughly 30 percent of the total area of annual crops in 1990. Between that time and 2004, it expanded to cover half of the total acreage in annual crops and remained so till 2007. The participation of the Amazon in total production of soybeans in Brazil grew from 16 percent to 30 percent between 1990 and 2007. Of this total area, 25 percent was in the state of Mato Grosso, where soybean production grew from 1.5 million hectares in 1990 to 5.1 million hectares in 2007, making it the most important area of soybean production in Brazil.

In order to understand the connections between cattle, soy and deforestation, it is necessary to consider the dominant pattern or sequence taking place in the Brazilian Amazon. The first step is the removal of the forest for lumber, in order to establish the basis for livestock production. Cattle, as mentioned above, come to deplete the soil of its nutrients and also cause erosion, therefore before a transition to soy takes place, there is the introduction of a crop, such as rice, in order to facilitate the recovery of the soil's nutrients, and finally the planting of soy, with the higher profitability. With regards to deforestation, cattle are usually seen as the main driver but in fact one must look carefully at the sequence which involves soy, especially as the area cultivated for soy has quadrupled in the Amazon between 2006 and 2018 (Rodrigues 2018).

With respect to Argentina, the role of the State, even after the dictatorship, was also key during several decades, perhaps with fewer notable examples of displacement or expropriation of peasants or indigenous populations through the use of force and violence, but more through the use of manipulations for accessing land, privatizations and buyouts. There exists on the other hand a growing concern regarding what type of development, especially considering socio-environmental issues, in particular with respect to soy. In addition, soy is very capital intensive. Haro Sly (2017, p. 5) has pointed out that “For each 1000 Ha, the soybean crop employs 15 workers while for the same size the sugar cane employs 350 workers and the citric crop employs 1,300 workers.” She also makes the point that due to the high level of mechanization, there have been increased shifting of unemployed, from rural areas to the cities, as soy has expanded.

In this section, concrete historical examples were presented, justifying the relevance of the concept of accumulation by dispossession by Harvey, especially when considering what took place in the Amazon under the military dictatorship and how this facilitated the expansion of lumber, soy, and cattle. Notoriously absent from this list is that of mega-mining, which is the topic of the next section.

Mega-mining and Accumulation by Dispossession¹⁶

Evidently mineral extraction is a major example of reprimarization in the Amazon, and the category of accumulation by dispossession clearly fits, especially in a case like Bethlehem Steel in Amapá in 1957. Although this book is concentrating on Argentina and Brazil, the importance of mining in Latin America in the first decades of the 21st century is quite relevant; and thus, the relevance of accumulation by dispossession and mega-mining in general will be considered before turning to specific cases in Argentina and Brazil, including the Amazon.

The exploitation of minerals, oil and gas is traditionally a sector in which the rates of profit can be very high, especially where ground rent is incorporated into profits. The initiation of these extractive activities requires, in turn, processes of dispossession and often plunder, in particular land-grabbing, control and occupation of large areas of land and of natural resources like water. For capital, the less expensive the inputs, and the greater the control over land ownership, the more profitable their investments become.

On the other hand, in the 2000s, the rise in the prices of numerous raw materials linked to the outstanding growth in China, led to a “mining super-cycle”. In this context, the number of mining exploration and exploitation megaprojects skyrocketed in the global South. For instance, Latin America today concentrates 30% of the investment in global mining exploration (S&P Global 2018). Due to mega-mining’s tendency toward larger and larger scale production, there is a need to have more and more territories available to implement these projects. New deposits are often identified in indigenous or peasant territories, with a set of specific cultural and ecological concerns. Under these circumstances, dispossession of local people, land, and resources is necessary for the installation of large-scale mining in a given territory. The main forms of dispossession associated with mega-mining are: dispossessions of lands and territories, of communal goods and natural resources. Several Latin American scholars argue that the mega-mining boom of the last 20 years, as a whole, is an example of accumulation by dispossession and that the numerous anti-mining struggles that have multiplied in the region and on a global scale in the same period can be interpreted as responses to this accumulation mechanism. Processes constitutive of accumulation by dispossession associated

¹⁶For further discussion see Sacher (2015, 2017).

with large-scale mining have been documented in many territories, in the global north and south, and can often be understood, as Harvey suggests, as one solution for transnational capital- be it from the United States, Canada, Europe, Japan and now even from China - to find highly profitable new opportunities of investment (Sacher 2017). These appropriations of land are usually associated with the violent expropriation of peasants, indigenous and artisanal miners and massive losses of commons and collective, and private lands, including individual private lands.

In the case of Argentina, Galafassi (2010) cites the example of the Mapuche¹⁷ lands and other protected lands which were concessioned, “with the argument that the subsoil is the property of the State”. Machado Aráoz (2010) shows how the dynamics of dispossession needs to be understood from different dimensions: physical, economic, environmental and socio-cultural, such as in Catamarca, Argentina in the copper and gold mine Bajo de la Alumbrera. In Brazil, one of the principal examples of reprimarization is the significant presence of large-scale mining projects or mega-mining in the Amazon. Mining constitutes close to 75% if not 80 of the exports of the state of Pará. A key aspect is the high mineral content in the mines such as Carajás, the largest open-pit iron mine in the world and which is six times more productive than similar mines in China. This result is reflected in the particularly high differential rents obtained by foreign or Brazilian TNCs operating in the Amazon.

Moreover, the State and the large Brazilian banks have played a crucial role in the development and control of the mining sector during recent decades and this process constitutes another example of accumulation by dispossession in the Amazon. Three of the most successful mining corporations in the Amazon are: Indústria e Comércio de Minérios Inc. (ICOMI); Mineração Rio do Norte (MRN); and the Companhia Vale do Rio Doce (CVRD), or simply Vale. (Cooney and Trindade 2016). In fact, during the dictatorship, expropriations of populations occurred in several instances in order for mining firms to gain access to land with mineral deposits, for example the case of Vale do Rio Doce. Unfortunately, Vale continues to employ violence even in the present day, contracting private security firms, that have attacked families in the city of Parauapebas in the state of Pará, that have been camped out. They attacked families totaling 150 people, using tear gas and rubber bullets, and injuring over 20 peasants, including children and elderly people. This has been going on since 2016, given the fact that Vale obtained the land through an irregularity in order to gain access to a mine. In summary, Latin America is probably the region with the most virulent and organized social protests against mega-mining projects, at present.

¹⁷ The Mapuche is an indigenous nation whose territorial sovereignty has been threatened or violated by several mining companies and both the Argentine and Chilean governments.

7. Conclusions

This paper began with a quick summary of the impacts of neoliberal globalization, and in particular the role of TNCs and the WTO and how these set of factors combined with specific historical contexts led to the tendencies of deindustrialization and reprimarization in Argentina and Brazil. The processes of deindustrialization were first considered, reviewing the end of ISI and the arrival of neoliberal policies for both countries and with distinct trajectories and periods. The impacts for manufacturing industry were examined followed by an analysis of reprimarization. The sixth section analyzed the relevance of Harvey's concept of accumulation by dispossession in the context of reprimarization in Argentina and Brazil.

In particular, the sectors examined were those associated with reprimarization, such as soy, cattle and mining. In the last decades, there was a "quantum leap" in the magnitude of the mining operations, as well as the concessions granted to mining TNCs, not to mention the disproportionate expansion of soy and cattle in the Brazilian Amazon, or the exponential expansion of soy in the Pampas and other parts of Argentina. It can be argued that these dispossessions were necessary conditions for large-scale projects, anticipating high profitability, especially considering the role of ground rent.

Consistent with the analysis of the State by Harvey and Marx, was the evidence of the Argentine and Brazilian State employing legal and extra-legal means and violence in support of the needs of the TNCs. Therefore, from the analysis in this chapter it can be concluded that Harvey's concept of "accumulation by dispossession" contributes to our understanding of the dynamics at work in the occupation and appropriation of lands and resources by TNCs associated with the tendency toward reprimarization for the cases of Argentina and Brazil.

It is not clear what the exact development trajectories for both Argentina and Brazil will be in coming decades given the fact that the COVID-19 pandemic is the largest wrench thrown into the functioning of the global economy. Moreover, given the difficulties which the Fernandez Presidency faces after Macri's return to more neoliberal orthodoxy and IMF dependence, and the prospects for Brazil with the current proto-fascist Bolsonaro in power, the future looks bleak and more uncertain. In any case, the continuity of reprimarization seems to be a certainty. Although such a strategy could have success in the short run, depending on trends in the global economy, historically, the prices of primary goods tend to be more volatile and associated with declining terms of trade, as argued by Prebisch and others. It appears that the political hegemony of finance-dominated neoliberal views will continue globally for the moment, and unfortunately, in spite of economic failure, the neoliberal politicians are still in power, whether in the US, Europe or China, or in most countries in Latin America.

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