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The repoliticisation of China's infrastructure investments in the global south: a case study of Brazil's agri-food system

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ABSTRACT

China's state-led infrastructure approach has shifted its role in global agricultural markets from a passive participant to a visible political and economic actor. Brazil illustrates this dynamic. Since the late 2000s, it has become a destination for Chinese agricultural investment. Following unsuccessful attempts to acquire land amid heightened food-security concerns, Chinese actors shifted towards mergers and acquisitions of incumbent agribusiness corporations, reproducing existing market practices. More recently, a third phase has emerged, marking the consolidation of Chinese presence through large-scale infrastructure projects, including transport corridors, logistics hubs, and storage facilities. Drawing on interviews and document analysis, we show that this marks a reversal of an earlier depoliticisation phase: Chinese firms are now backed by state financial and political support and negotiate extensively with Brazilian authorities. While this supports characterisations of China as state capitalist, we show that state imperatives are not imposed unilaterally from the top down. Instead, they are shaped relationally through strategic interactions during firms' internationalisation. From this perspective, the Global South is not merely shaped by dominant actors but involved in negotiating power over production and consumption. The outcome is contradictory: Brazil's dependency as a commodity exporter is reinforced, yet this dependency is increasingly politicised and contested.

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Introduction

As is widely acknowledged, China's overseas investment strategy is distinctive for its state-led, infrastructure-centred approach, with its flagship Belt and Road Initiative mobilising vast financial resources internationally. Yet the implications of this strategy for power relations in the Global South remain insufficiently examined. In agricultural markets – an important component of China's presence – this infrastructure-heavy approach is relatively recent.

In Brazil, a primary destination for China's agricultural investment, Chinese firms first entered in the late 2000s, exploring opportunities for land acquisition aimed at securing stable soybean supplies. This initial phase coincided with rising domestic demand in China for feed crops and was closely tied to broader food security concerns. However, amid local political resistance, regulatory constraints, and limited domestic experience, firms adopted a more adaptive strategy by the mid-2010s, shifting toward mergers and acquisitions to embed themselves within Brazil's agri-food complex (Oliveira 2019, Peine 2020, Fares 2023). Although food-security imperatives persisted, Chinese investment increasingly sought to move away from the political spotlight. The acquisition of Noble Agri and Nidera by the state-owned China National Cereals, Oils and Foodstuffs Corporation (COFCO), alongside ChemChina's acquisition of Syngenta, exemplifies this second phase, in which Chinese actors sought legitimacy and a stronger foothold within a private-led agri-food system by preserving the management structures and operational practices of the acquired firms.

In recent years, however, Chinese investment has entered a new phase marked by the expansion of large-scale greenfield infrastructure projects aligned with the so-called 'China model' of development (Oakes 2024). These initiatives aim to enhance sourcing capacity and secure control over strategic nodes of global value chains, particularly in transport and logistics, while reflecting long-standing food security concerns. Broader infrastructural ambitions have been evident since at least Dilma Rousseff's second term (2014-2016) (Wilkinson et al. 2016, Peine 2020). However, under Lula's third presidency (2023-present), this dynamic has become more pronounced. Firms such as COFCO are increasingly consolidating their presence through integrated strategies, often coordinated with other state-owned enterprises, enabling Chinese agribusiness actors to compete more directly with established firms such as the ABCD traders (ADM, Bunge, Cargill and Louis Dreyfus).

Through this shift, China has moved from a relatively peripheral position to a central actor in global food markets, drawing agricultural export leaders like Brazil into closer strategic alignment. China is now the main destination for Brazilian agricultural products, absorbing approximately one-third of total shipments in recent years and purchasing around three-quarters of Brazil's soybean exports (MDIC 2025). Concurrently, Brazil's share of China's soybean purchases has increased to an all-time high, serving as an alternative to US exports. In this context, China has deepened its political and economic engagement with Brazil, moving beyond the role of a conventional trade partner.

What does the shift toward state-led infrastructure investment imply for China's relations with the Global South and for broader power relations in agri-food systems? We argue that this emerging phase reintroduces a distinct form of politicisation reminiscent of China's early investments, as infrastructure development increasingly intersects with strategic statecraft and geopolitical objectives. Yet this politicisation is relational, as project implementation is mediated by negotiations with national and subnational actors in Brazil, shaping outcomes on the ground. In this process, domestic elites actively seek to align Chinese geoeconomic priorities with local development agendas and political interests, reflecting broader dynamics of mutual adaptation and strategic accommodation between Chinese and local actors (Oliveira and Myers 2020, Bervejillo and Wainwright 2025). Infrastructure projects, while often executed by globally integrated agribusiness firms, are long-term and capital-intensive, relying on complex interactions

among state-owned enterprises, private actors, and political authorities across multiple scales (Dussel Peters et al. 2024). Throughout the article, we use ‘infrastructure investments’ as a broad category encompassing distinct modalities of Chinese involvement, from operational assets to feasibility-stage initiatives.

This discussion engages with debates on state capitalism and food regimes. Amid intensifying geopolitical competition, the state has assumed an increasingly prominent role in global capitalism (Alami and Dixon 2020, Schindler et al. 2023), reshaping the power relations that structure contemporary food systems. Related scholarship argues that food production and consumption under neoliberalism have been heavily shaped by transnational agribusiness and financial capital, privileging large-scale commodity flows over food sovereignty and ecological sustainability (Friedmann and McMichael 1989, McMichael 2016). China’s state-led approach reflects a hybrid model that combines state-directed food security and industrial strategies with market-oriented practices aligned with established corporate logics (Belesky and Lawrence 2019, McMichael 2020, Wesz Junior et al. 2023). As China expands its state-driven infrastructure approach, a central question concerns the extent to which outcomes are shaped by the agency of peripheral countries through negotiation and contestation.

The paradox here is that, however politicised Chinese engagements may be, they operate within structural conditions that constrain the agency of peripheral actors. While Chinese involvement can generate specific benefits – such as improved infrastructure or support for certain producers – it does not fundamentally alter the neoliberal organisation of Brazil’s agri-food economy. Instead, Chinese-led investments reinforce Brazil’s role as a primary commodity exporter and reproduce territorialised forms of dependency that maintain its structural subordination within global agribusiness.

This research adopts a case study approach, supported by 20 high-profile interviews and document analysis conducted between 2022 and 2025, as listed in the Appendix. The interviews involved representatives of Chinese firms, Brazilian government officials at federal and state levels, and stakeholders from the private sector and civil society. Some interviews serve as direct empirical evidence, while others inform the broader analytical interpretation. To strengthen the validity and reliability of the findings, the analysis is complemented by desk-based research, including policy documents, newspaper articles, corporate reports, and statistical data. COFCO features more prominently in the empirical material due to its central role in China’s agri-food operations in Brazil, as well as the greater availability of interview access and documentation. All interviewees requested anonymity and are therefore identified only by their institutional affiliation and role. With participants’ consent, interviews were audio-recorded, transcribed, and used as the basis for the quotations presented in this article.

The article is organised into four main sections following the introduction. The first section connects debates on China’s expanding infrastructural presence in the Global South with emerging interpretations of state capitalism. The subsequent sections examine, first, the depoliticisation of Chinese investments through mergers and acquisitions and, then, the recent re-politicisation driven by infrastructure projects and their locally mediated dynamics. The following section discusses China’s ambiguous role in Brazil’s agricultural infrastructure investment model. The conclusion offers final reflections and directions for future research.

State capitalism and China's global south engagement

It is widely recognised that China's rise has reconfigured global power beyond what is conventionally described as the neoliberal order. Its infrastructure financing in the Global South – most prominently through the Belt and Road Initiative (BRI) – reflects the mobilisation of state mechanisms to align economic activity with geopolitical and developmental objectives. Schindler and Kanai (2021) conceptualise the return of the state in large-scale infrastructure as a new global development regime, reorganising spatial geographies to integrate regions into global value chains. This spatial planning entails a renewed state role, albeit intertwined with neoliberal objectives such as attracting foreign investment and opening new extraction zones within global production networks.

These transformations have fuelled debate over how Chinese state-led investment reshapes political relations in the Global South. While some view China's model as growth-oriented and development-aligned, persistent asymmetries and emerging dependencies complicate narratives of South–South cooperation. Oakes (2024) argues that infrastructure exports function not only as developmental tools but also as technopolitical instruments shaping governance practices abroad. Similarly, Schindler et al. (2023) show how states deploy financial instruments – including public investment vehicles and public-private partnerships – to advance new industrial strategies. Although such mechanisms deepen global market integration, they also reinforce political authority.

China's global expansion is frequently interpreted through state capitalism (Milhaupt and Zheng 2015). Yet accounts that depict a coherent blueprint emanating from Beijing risk overstating central coordination. Instead, outbound investment unfolds through negotiated and often fragmented interactions with local actors (DiCarlo and DeBoom 2025). This view aligns with more relational approaches to state capitalism, which conceptualise it as historically evolving and embedded in global power structures (Alami and Dixon 2020, Nölke et al. 2020, Alami et al. 2023). Rather than fixed national models, states engage markets through diverse mechanisms shaped by domestic priorities and international pressures. State practices are thus transnationally constituted, with power exercised across scales through embeddedness in global circuits of capital (Alami et al. 2023).

This perspective resonates with Harvey's (2005) argument that global capital depends on spatial fixes – infrastructure, regulation and institutional support – to sustain accumulation. States do not merely facilitate markets; they shape the conditions of expansion, influenced by political and economic dynamics elsewhere (Su and Lim 2023). This underscores a territorial dimension of state capitalism. Drawing on Elden's (2013) conception of territory as political technology, Alami et al. (2023) argue that states deploy territorial strategies to govern accumulation and manage capital flows. Territory is thus socially produced and continually reshaped through negotiation. The global spread of state capitalism may therefore be understood as reterritorialisation, extending state power beyond borders by linking domestic imperatives to global capital circuits through interactions with governments, firms and intermediaries.

Recent studies highlight these spatial dynamics in China's global expansion. Goodfellow and Huang (2021), examining urban infrastructure in Ethiopia and Uganda, show that projects enabled by Chinese agencies do not embody a singular Chinese vision; outcomes

depend on local politics and bargaining. Su and Lim (2023) similarly demonstrate how capital expansion within China relies on reconfigured spatial arrangements that reshape state capacities. The BRI exemplifies this dual dynamic: an externalisation of domestic accumulation pressures and a reorganisation of global space (Summers 2020). Infrastructure projects link Chinese state-owned enterprises and financial institutions with host-country actors, embedding Chinese state power within development processes. Szabó and Jelinek (2023) illustrate how Chinese firms, often partnering locally, navigate regulatory differences, coordinate cross-border finance and negotiate municipal authorities, thereby blurring jurisdictional boundaries. Although guided by domestic imperatives, overseas implementation remains mediated by local spatial and political negotiations.

China's expanding role in global agri-food markets further demonstrates how state-led accumulation intersects with historically uneven agrarian structures. Through trade, finance, investment and infrastructural integration, China has become central to global circuits in soy, meat, grains and biofuels, often reinforcing primary commodity dependence in agro-exporting economies. Scholarship identifies a pattern of regressive specialisation, whereby peripheral economies deepen low-value, land-intensive exports while value-added activities and price-setting power remain concentrated elsewhere (McMichael 2016, Wilkinson et al. 2016, Giraudo 2019, Oliveira 2019).

From a relational state capitalism perspective, China's rise must be situated within the evolving dynamics of contemporary food regimes. Research emphasises local-global nexuses, showing how national and subnational contexts shape agrarian power relations within commodity chains (Vale 2018, Parajúa et al. 2025). Rather than passive recipients of external pressures, Global South countries actively negotiate trade, investment and policy outcomes (Tilzey 2024, Tirmizey 2024). They function simultaneously as mediators and agents of change, leveraging domestic institutions and stakeholders to influence commodity market configurations.

Depoliticisation of investments

Building on the relational dimension of state capitalism and its intersection with international food security debates, we can examine how these dynamics unfold in specific bilateral contexts. In China's engagement with Brazil, shifts in investment practices reveal a transition from an earlier phase of adaptation – here termed depoliticisation – to a later phase of more explicitly negotiated projects with local stakeholders as Chinese agribusiness consolidates its territorial presence (Escher et al 2018). This section addresses the former.

Oliveira (2019) shows that Chinese agribusiness moved away from earlier, more propagandistic strategies, particularly land acquisitions framed in the mid-2000s as contributions to China's food security. At that time, firms often relied on local intermediaries linked to government officials, but this approach attracted considerable media scrutiny. In this context, land acquisitions became increasingly politicised, understood as a process through which an issue turns into an object of public controversy, involving a broader range of actors and more polarised positions, and blurring the boundary between what is considered 'political' and 'non-political' (Hay 2007). Following renewed Brazilian restrictions on foreign land ownership, this expansionary model largely receded.

From 2012 onwards, however, Chinese companies increasingly pursued alternative entry modes, notably the acquisition of multinational firms to expand their position in the soybean sector (Escher et al 2018). Large conglomerates – including state-owned and technology-oriented enterprises – internationalised through mergers and acquisitions (M&A). Data from the China Global Investment Tracker, cited by the American Enterprise Institute (2025), indicate that between 2005 and 2024, 87 per cent of the cumulative value of Chinese FDI in Brazil occurred through M&A, with only 13 per cent via greenfield projects. Cariello (2025), however, identifies temporal variation: M&A peaked between 2014 and 2016 amid public concessions and privatisations, while from 2017 onwards greenfield investments regained prominence. In several recent years (2017, 2018, 2022, 2023 and 2024), greenfield projects accounted for the majority of new Chinese initiatives, signalling gradual rebalancing and broader territorial diversification.

In agriculture, COFCO acquired 51 per cent of Nidera and Noble Agri in 2014, taking full control of Noble Agri in 2016 and Nidera in 2017 (COFCO International 2016, Reuters 2017). Both were integrated into COFCO International, consolidating global origination, trading and logistics operations. In the same period, Hunan Dakang, part of the Shanghai Pengxin Group, acquired 57 per cent of the Brazilian trader Fiagril (Reuters 2016, 2025). In agrochemicals, ChemChina acquired Syngenta in 2017 (BBC News 2016), and in 2018 Syngenta purchased Nidera Seeds from COFCO (Syngenta 2018), strengthening Chinese-linked presence in input markets.

These transactions deepened Chinese capital's integration across the soybean chain, from inputs to export logistics. Yet expansion through M&A also facilitated depoliticisation. As Hay (2007) argues, depoliticisation occurs when decisions are framed as inevitable or technical, whereas politicisation involves reopening them to contestation and public deliberation. In this sense, acquisitions enabled Chinese firms to embed themselves within existing market structures, where operations appear as routine commercial practices rather than politically contested processes. As Wesz Junior et al. (2023) and Fares (2023) note, COFCO largely reproduces the strategies of the firms it acquired, adapting to institutional norms established by dominant private actors in coordination with state institutions.

North Atlantic agribusiness conglomerates – the ABCD firms – alongside Brazilian companies such as Amaggi and JBS, have long structured the sector through contract farming, sectoral associations and strategic state alliances. Their expansion prioritises surplus extraction for international markets, with prices determined in foreign exchange markets and subject to financialisation (Clapp 2017, Niederle and Wesz Junior 2021). Fares (2023) further identifies the emergence of a globalised constituency within Chinese agribusiness, reflected in COFCO's financial integration and its emulation of established corporate practices. This pattern aligns with findings that Chinese state-owned conglomerates increasingly operate within transnational private markets, gaining legitimacy by acting as commercial entities (Babic et al. 2019, De Graaff 2020).

However, while reproducing prevailing investment logics, Chinese firms have increasingly consolidated their position through infrastructure-led initiatives or by leveraging their influence within such projects. The following sections examine this subsequent phase and consider how it signals a shift towards re-politicisation in the region.

Repoliticising investments

As Chinese firms and state-linked entities become increasingly embedded in global commodity circuits, they have shifted from adaptive engagement to a strategy of consolidation, thereby challenging established hierarchies and repositioning China within value chains long dominated by Western actors (Werner 2023). This consolidation is closely linked to China's broader expansion into global infrastructure, advancing large-scale projects involving state-owned enterprises, a model consistent with its broader Belt and Road Initiative strategy.

Chinese investments in Brazil's logistics infrastructure are concentrated in three main areas – railways, ports, and storage facilities – through projects that link major commodity-producing regions to key export corridors (as summarised in Table 1). In the railway sector, state-owned enterprises such as China State Railway Group, and China Railway Engineering Corporation (CREC, also known as China Railway Group) are involved in large-scale, structural projects like the Bioceanic Railway, Central-West Integration Railway (FICO), and West-East Integration Railway (FIOL), which aim to connect central and frontier regions (including Mato Grosso, Goiás, and Bahia) to strategic Atlantic and Pacific ports (Figure 1), although many of these initiatives remain at the feasibility, negotiation, or partial implementation stages. This is a strategic investment, crossing one of the main soybean production areas (Figure 2), which will reduce costs and transportation time for goods to China.

In the maritime transport sector, companies such as China Communications Construction Company (CCCC), COFCO, and industrial conglomerates like Minmetals and Shougang lead investments that include private-use terminals (such as São Luís), expansions in established ports (such as Santos), and the opening of new direct maritime routes between Brazil and China, already operational in Pecém (CE) and Santana (AP). Lastly, in storage and processing, COFCO and Jiangsu Zhengchang are expanding their footprint through silos, warehouses, and feed or biomass plants in strategic states, reinforcing logistical capillarity and control over origination. Table 1 systematises these initiatives under the umbrella of 'infrastructure investments'. This category includes different forms of engagement, ranging from fully operational assets and ongoing expansions to projects under negotiation or feasibility assessment, as well as exploratory participation and diplomatically mediated initiatives. Rather than treating these as equivalent, we conceptualise them as distinct modalities within a broader process of infrastructure-led engagement.

This variation highlights that Chinese infrastructure investments operate through multiple modalities, which differ in their materialisation, risk profile, and political embeddedness. Overall, these projects combine features of both greenfield and brownfield investments, involve predominantly Chinese state-owned enterprises and industrial conglomerates, not exclusively from the agricultural sector. They display varying degrees of progress: some already operational, others undergoing continuous expansion, and several still dependent on licensing processes, financial viability, or political-institutional alignment between Brazil and China.

The strategic importance of these infrastructure projects is particularly evident in the case of COFCO, which responds both to China's growing domestic demand for feed crops and non-staple food products and to the need to facilitate the global expansion of its agribusiness operations. COFCO has consolidated significant investments in

Table 1. Chinese investments in logistics infrastructure, railways, and ports in Brazil.

Sector	Project	Chinese Companies	Description	Status in 2025
Railways	Bioceanic Corridor (Brazil–Peru)	China State Railway Group; China Railway Economic and Planning Research Institute; CREC	Connects Bahia's coast to the Port of Chancay (Peru); core axis of Brazil–Asia logistics integration.	Memorandum of Understanding signed in 2025. In the feasibility study phase.
Railways	Central-West Integration Railway (FICO)	CREC; China Railway Economic and Planning Research Institute	Connects Mato Grosso to Goiás, linking to the North–South Railway; part of the bioceanic integration corridor.	Under construction, works began in 2021; feasibility and planning studies with Chinese participation.
Railways	West–East Integration Railway (FIOL)	China Railway No. 10 Engineering Group (CREC-10), a subsidiary of China Railway Group Limited.	Connects Bahia's inland region to Porto Sul (Ilhéus); transports soy and iron ore; part of the bioceanic route.	75% of section I completed; halted in 2025 due to contractual issues; resumption depends on new capital and state guarantees.
Railways	Ferrogrão (EF-170)	CCCC	Aims to connect Sinop (MT) to the port of Miritituba (PA).	CCCC's role in Ferrogrão is limited to expressed interest in the bidding, with no public evidence of actual investment or project execution.
Ports	Ilhéus (BA)	CREC; CCCC; Minmetals; Shougang; Dalian Huarui	Deep-water terminal integrated with FIOL; supports grain and iron ore exports.	Under construction; Completion expected by 2027.
Ports	São Luís Port (MA)	China Communications Construction Company (CCCC)	Construction of a private terminal (TUP) for grain and mineral exports.	Initially a Sino-Brazilian project; sold in 2022 to Cosan, which took full control.
Ports	Santos Port (SP)	COFCO International	25-year concession (renewable up to 70) for terminal STS11; expanding export capacity with new silos.	Concession signed in 2022; expansion ongoing.
Ports	Pecém Port (CE)		New direct maritime route with China.	Operations started in 2025; 10% increase in port throughput.
Ports	Paranaguá (PR)	CMPorts	Container port terminal	Currently in operation; acquired in 2018.
Ports	Direct maritime route between the Greater Bay Area (Guangdong-Hong Kong-Macau) region and the Porto de Santana das Docas (Amapá, Brazil).	Zhuhai Sino-Lac	It aims to shorten transit time by around 14 days versus traditional shipping corridors	A protocol signed on 4 November 2024 sets up this direct maritime route.
Storage	Mato Grosso – Silos and Warehouses	COFCO International	18 warehouses (1.1 Mt capacity); plans for 30 more; satellite-based monitoring.	Expansion underway; part of a global sustainable credit package (US\$ 2.3 billion).
Storage	Curitiba (PR) and Palmas (TO)	Jiangsu Zhengchang Group	Feed and biomass plants (Palmas) and storage equipment factory (Curitiba).	Projects announced 2015–2017; no public confirmation of completion or operation.

Source: Authors' own elaboration based on collected data.

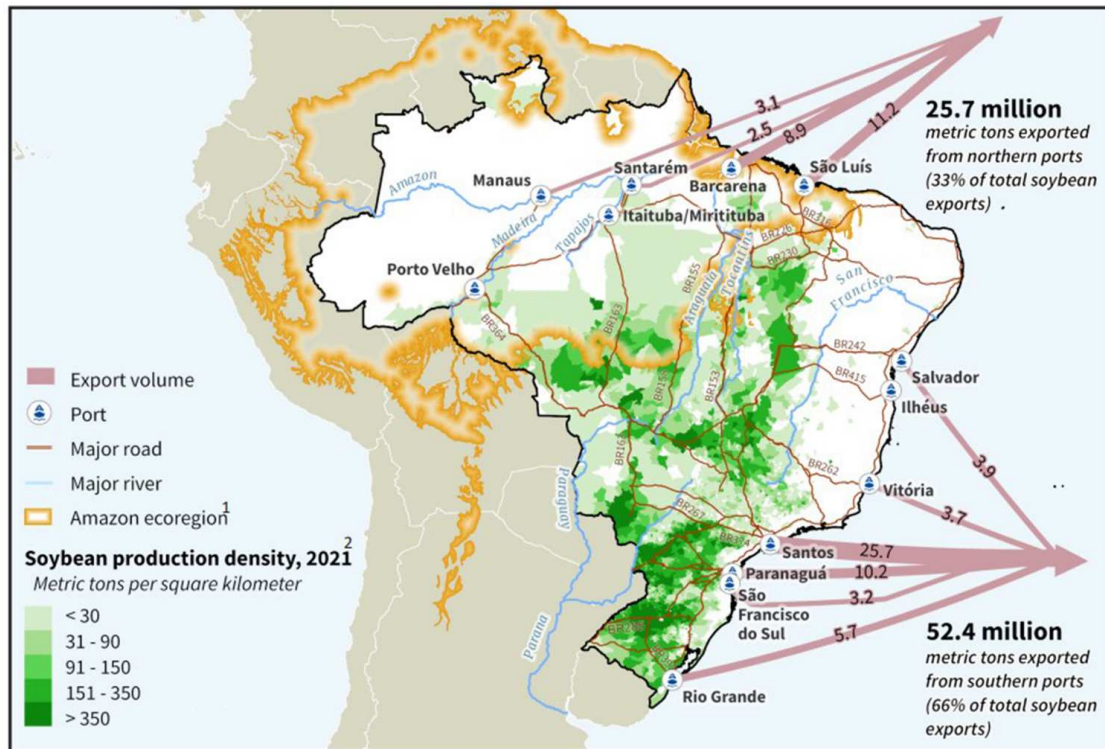


Figure 1. Ongoing railway infrastructure projects in Brazil.

Source: Figure produced by Andrés Alegría (2025), using data provided by the Ministério dos Transportes.

Brazil's South and Southeast regions. In 2022 COFCO acquired the concession of the STS11 terminal at the Port of Santos – the country's principal port – for 25 years (renewable for up to 70 years), alongside constructing new silos and modernising loading operations. This investment strengthens the export capacity of Brazil's main port hub and is expected to increase COFCO's export capacity from 4.5 million to 14.5 million tons per year by 2026. To enhance its logistics operations in the region, COFCO invested R\$1.2 billion to acquire 23 locomotives and 979 railcars, enabling transport of up to 4 million tons annually in 2025. This capacity supports the movement of sugar from its four mills in the interior of São Paulo and grains and bran from its Central-West warehouses and crushing plant to the Port of Santos (Globo Rural 2025).

According to the executive responsible for COFCO's infrastructure operations in Mato Grosso, COFCO has shown intention to ramp up investments in Brazil's North and Northeast. In 2022, COFCO was the leading shipper of soybeans to Miritituba (Pará), a logistics flow that required a substantial volume of trucks – typically around 300 per day during the harvest and 200 during the off-season – resulting in higher export costs and exposing operations to the risks associated with precarious road conditions. According to the interviewee, developing transport logistics in northern Brazil is more strategically important for COFCO than for its competitors, both because of the market volume it controls and because other companies already possess larger storage capacity and soybean-crushing



¹ World Wildlife Fund.

² Brazilian Institute of Geography and Statistics—Produção Agrícola Municipal.

Note: A hyphen in an otherwise empty cell denotes that the data are not available.

Source: Comex Stat, Ministério da Economia and USDA, Foreign Agricultural Service.

Figure 2. Soybean production and export areas in Brazil (2022).

Source: USDA (2023).

operations in the region, making export-oriented pathways particularly central for the Chinese conglomerate (Interview 18, see Appendix).

As Chinese firms expand into transport corridors, logistics hubs, and storage infrastructure in Brazil, their operations increasingly depend on deep institutional adaptation. This involves understanding the functioning of the Brazilian state across multiple levels of governance, mastering complex bureaucratic and legal procedures, and navigating the mechanisms that regulate public tenders and concession contracts. The experience of China Communications Construction Company (CCCC) illustrates this process well. By acquiring the Brazilian engineering firm Concremat and establishing a subsidiary in São Paulo, CCCC positioned itself more effectively within national procurement frameworks while gaining familiarity with environmental regulations, the judicial system, and local business practices.

CCCC also took part in the initial inquiries for the Ferrogrão railway (EF-170), which aims to connect Sinop (MT) to the port of Miritituba (PA). Considered one of the most important corridors for transporting soybeans and corn from northern Mato Grosso, the project has drawn interest from several international investors (Abdenur et al. 2021). According to a 2021 report from the Carnegie Endowment for International Peace, CCCC emphasised throughout the process the importance of learning and adapting to Brazil's institutional and regulatory environment:

First, it acquired a better understanding of government priorities in this part of Brazil, especially in terms of export-oriented infrastructure investments and how such deals are negotiated. Second, it improved the CCCC's understanding of the rules, bureaucratic procedures, and political debates that have affected Brazil's public auction process, including those around social and environmental considerations. And third, it expanded the company's familiarity with the Brazilian government and the country's business culture, especially as it relates to the agribusiness and infrastructure sectors. (Abdenur et al. 2021, p. 21)

A comparable approach was adopted by COFCO International, which secured a majority stake in a grain terminal at the Port of Santos. By complying with Brazil's port concession framework, COFCO reinforces what Suchman (1995) defines as regulatory legitimacy – a form of moral legitimacy derived from adherence to formal rules and institutionalised procedures. This alignment with the Brazilian regulatory environment strengthens the company's acceptance among domestic stakeholders, signalling conformity with nationally sanctioned standards of operation. COFCO has been particularly proactive in aligning its investment strategy in Brazil with sustainability standards, both those established by national multi-stakeholder initiatives such as the Soy Moratorium and by international frameworks, following the example set by incumbent multinationals in the country (Fares et al. forthcoming).

Nevertheless, the institutional adaptation of Chinese firms often extends beyond mere normative learning and assimilation. It encompasses deeper political engagement with Brazilian authorities. Because their investments rely on regulatory stability and political alignment, infrastructure projects are inherently negotiated and contingent. Direct interactions with state authorities reveal a pattern of engagement in which economic diplomacy is increasingly intertwined with institutional mediation.

The negotiations surrounding the Bioceanic Corridor, intended to connect Brazil to the Peruvian coast via a transcontinental railway, illustrate this dynamic. Since Chinese Premier Li Keqiang's 2015 visit, during which Brazil, China, and Peru signed a memorandum establishing a trilateral working group to assess the project's feasibility, cooperation has increasingly intertwined technical collaboration with diplomatic dialogue (CEBC 2015). Subsequent Chinese missions to Brazil – most notably the 2017 delegation from the China Railway Engineering Corporation (CREC), which participated in a Brazilian Senate hearing – reinforced this pattern through field studies along the proposed route and direct engagement with federal and state authorities (Brasil 2017). Similarly, Ferrogrão saw preliminary inquiries from CCCC and other Chinese actors in logistics sector conducted through government exchanges (Abdenur et al. 2021), and the project was further discussed during the May 2025 visit of the Brazilian governmental delegation to Beijing, led by Minister Simone Tebet, which focused on Chinese investments in railway infrastructure.

Such institutional mediation reflects a broader picture in which negotiated agreements do not occur solely between the Brazilian government and Chinese state-owned enterprises (SOEs). It is common for Chinese private companies seeking to invest in Brazil to turn to Brazilian diplomatic and state agencies for support. As an interviewee from the Brazilian Embassy in Beijing explained, Chinese investors from various sectors often approach the embassy in search of concessions – ranging from simple matters such as visa requests to broader regulatory issues, including attempts to have environmental licenses removed – requests that are, naturally, largely denied (Interviews 14 and 15, see Appendix).

Such mediation extends beyond bilateral interactions, encompassing deeper engagement with local authorities and stakeholders, which is particularly crucial given that the success of these projects depends on it. According to a federal public manager, in an interview about Chinese investments in Brazil,

There is a fundamental institutional aspect that the new government [Lula], since 2023, has made quite clear: it is essential to consult with state governments. These governments have their own bureaucratic structures and technical teams. By their very political nature, each governor tends to defend certain interests – some pull in one direction, others in another – but these consultations need to occur on a technical basis. [...] Investors only allocate resources to something that demonstrates viability and institutional stability. (Interview 4, see Appendix)

These interactions demonstrate that infrastructure investment functions not only as an economic driver but also as a political instrument, shaping the evolving China–Brazil relationship. The following section explores the distinctive features of this dynamic, highlighting how politicisation unfolds within Brazil’s political context. Importantly, repoliticisation in this article is not understood simply as an increase in state presence or regulatory adaptation. Rather, it refers to shifts in the forms of political negotiation and contestation surrounding investment processes. While institutional adaptation involves alignment with existing regulatory frameworks, and state involvement may facilitate or constrain investment flows, repoliticisation captures the extent to which these processes become subject to explicit bargaining, dispute, and multi-level political mediation among state actors, firms, and societal stakeholders.

China’s ambiguous role in Brazil’s agricultural infrastructure investment model

As China shifts from an adaptive stance to a mediated approach in consolidating its investments in Brazil, it holds the potential to move beyond purely private regimes, advancing a distinct state-led agenda with possible developmental outcomes. This indicates that Chinese agribusiness not only reproduces existing global dynamics but also increasingly pursues negotiated political objectives by aligning with and capitalising on national development strategies abroad. However, this section will show that, while this holds true, it is constrained by China’s own investment interests and by Brazil’s regulatory and institutional settings, resulting in an ambiguous influence on the practices that currently structure Brazilian agribusiness.

China’s broader strategic goals in Latin America increasingly converge with Brazil’s own infrastructure ambitions. Although Brazil has opted not to formally join the BRI – seeking to preserve diplomatic autonomy, mitigate debt risks, and retain flexibility in balancing relations with other major partners – it nonetheless shares core strategic interests with China in infrastructure development. This convergence has produced a *de facto* shared agenda centred on physical connectivity and the security of resource supply (Abrão and Amineh 2024). China’s Cooperation Plan with CELAC (2022–2024) identifies infrastructure, trade facilitation, and energy and food security as central pillars of its regional engagement. Within this broader alignment, China has collaborated with the Brazilian government across key initiatives such as *Nova Indústria Brasil* (New Brazil Industry), the *Programa de Aceleração do Crescimento* (Growth Acceleration Program), the *Pacto*

pela Transformação Ecológica (Ecological Transformation Plan), and the *Programa de Integração de Vias Sul-Americanas* (Routes of South American Integration Program).

One might note, however, that the increasingly strategic bilateral partnership does not prompt a shift in Brazil's development and infrastructure financing model rooted in neo-liberal, market-oriented governance. If one thing, the rise of Chinese investment in Brazil coincides with a broader reconfiguration of the country's national investment policies, moving away from the Growth Acceleration Programme, which was characterised by a state-led approach reliant on public investment and federal coordination. In 2016, Brazil introduced a hybrid governance framework, the Investment Partnership Programme (PPI) under Brazil's National Logistics Plan (PNL 2035), emphasising private participation and long-term concessions and institutionalising public-private partnerships (PPPs) as the primary mechanism for expanding logistics and transport infrastructure. This approach linked Brazil's infrastructure development agenda with transnational circuits of capital, creating opportunities for foreign actors – particularly Chinese enterprises – whose financial capacity and technical expertise positioned them favourably within this new regulatory environment.

Moreover, state involvement in driving infrastructure development does not imply that the interests of investors under free market imperatives will be overridden. Indeed, the growing Chinese presence suggests that its politicisation can, in practice, reinforce market-driven dynamics. Interviews reveal that both federal and state governments have played a proactive role in facilitating foreign investment through tax incentives and public investments in infrastructure. As a representative of FETRAF-BA (Federation of Family Farming Workers in Bahia),¹ pointed out, 'what I see most often are tax exemptions. Companies settle with agreements that allow them to go for a period without actually paying the taxes owed.' They added that 'there's clearly a process of facilitation by both federal and state governments. I don't know of a single major company in Matopiba [the region comprising the northern and northeastern states of Maranhão, Tocantins, Piauí, and Bahia] or the Northeast whose project was blocked by the State. Everything moves in the direction of making things easier for agribusiness' (Interview 11, see Appendix).

These testimonies reflect a consistent institutional stance that prioritises large-scale agricultural investments, often at the expense of stricter regulation or oversight. The consolidation of Chinese firms through infrastructure projects, therefore, reinforces market imperatives, broadly benefiting large agribusiness. As a COFCO representative noted in an interview, it is not only Chinese companies that seek to expand commercial infrastructure; Western counterparts also stand to gain from such projects. This endorses the idea that Chinese players and Western agribusiness have shared profit-driven objectives and therefore operate under similar business practices, as the same interviewee from COFCO highlighted, 'What I saw here [about COFCO's investments in the region], to me, was a normal trader just like the others' (Interview 19, see Appendix).

The growing politicisation of Chinese investments also means that, while local agency can at times be mobilised to advance the interests of large agribusiness, it can just as easily constrain their expansion. In the latter context, though, Chinese investors have shown limited political and financial commitment to advancing strategic partnerships under negotiations that involved greater social and environmental scrutiny. This is evident in several infrastructure projects in Brazil. The Bioceanic Railway faced delays

due to divergent strategic priorities between Brazil and Peru and social and environmental concerns such as crossing the Amazon and the Andes. After initial feasibility studies in 2015–2016, the project stalled due to changes in the Brazilian government and high construction costs (Oxford Business Group 2015, Carvalho 2025). Progress was further hindered by the absence of a clear financial commitment from China, which, according to a Brazilian interviewee involved in the project, had expected less stringent environmental oversight (Interview 1, see Appendix). Although discussions have been revived under the current administration with plans for a new route connecting the Port of Chancay in Peru to the FIOCRP in Brazil, progress remains limited. The recent mission of Minister Simone Tebet to China in 2025, aimed at securing financing for the project, concluded without confirmation of Chinese investment, underscoring the persistent gap between diplomatic dialogue and concrete implementation (CNN Brasil 2025).

Similarly, the Ferrogrão railway (EF-170) project has remained largely undefined despite informal expressions of interest and exploratory studies. Chinese participation in its concession, financing, or execution has not been confirmed, and the project continues to face legal disputes, environmental controversies – particularly related to the Jamanxim National Park – and uncertainties surrounding its concession model (Abdenur et al. 2021, AGU 2025, Instituto Socioambiental 2025). Moreover, in São Luís, the CCCC partnered with WPR, a subsidiary of the WTorre Group, and Lyon Capital to build a multimodal Private Use Terminal (TUP), holding a majority stake of 51 per cent. However, in 2022, Cosan fully acquired the project and assumed leadership of its implementation after CCCC withdrew, citing regulatory uncertainties, environmental licensing delays, and changes in Brazil's investment environment that affected the project's financial viability (AidData 2018, LatinoAmérica Sustentable 2024).

Together, these cases illustrate that, despite Brazil's drive for agribusiness expansion, development outcomes are shaped by multiple actors, including domestic regulators and environmental and social stakeholders whose interests can sometimes counter or constrain those of the agribusiness sector. Although COFCO's environmental commitments increasingly comply with local regulations, the growing influence of Chinese agribusiness and its political engagement indicate that infrastructure investments do not signal a move away from the predatory and extractivist practices typical of the current corporate food regime. Instead, Chinese investments remain largely contingent on relatively weak social and environmental protections.

On the other hand, we note that the politicisation of Chinese investments in Brazil has at times expanded the agency of actors beyond the realm of large agribusiness, as bilateral relations generate indirect spillover effects. This includes a greater willingness among Chinese authorities to engage with Brazilian civil society organisations, which they view as strategic partners for fostering political proximity in line with China's South-South cooperation discourse. The most illustrative example is the Brazilian Landless Workers' Movement (MST) cooperation with China, which began with the adaptation of small-scale machinery for family farming and later evolved into a formal 2023 agreement between the countries' agriculture ministries, followed by plans for a national laboratory integrating mechanisation and artificial intelligence (Interview 17, see Appendix). While the initiative advances China's interest in expanding machinery sales, refining equipment through adaptation to Brazilian conditions, and potentially accessing data generated in the process, Brazilian authorities frame the project as strategically oriented toward

strengthening domestic technological capacity. Ensuring national financing, data sovereignty and long-term innovation autonomy has therefore become central to balancing the asymmetries embedded in this cooperation (MDA 2025, Nataraj 2025)

The centrality of domestic mediation becomes particularly evident in this case, which was facilitated by the Government of Rio Grande do Norte through the Northeast Consortium. The state government did not merely act as an institutional facilitator; it became a co-producer of the project: it negotiated the memorandum of understanding signed in 2022, coordinated the installation of the Demonstration Unit of Agricultural Machinery in Apodi, mobilised local universities and research institutes, and enabled testing and training activities for family farmers across several Northeastern states. This demonstrates that Chinese engagement in Brazil does not unfold in a unidirectional or exclusively state-to-state manner; rather, it is reconfigured by regional priorities, local political coalitions, and territorially grounded development agendas (Consórcio Nordeste 2023, 2024, MDA 2024).

Moreover, in order to advance the strategic cooperation with Brazil, Beijing has proposed in several instances the establishment of joint ventures between Chinese SOEs and Brazilian SOEs, reproducing a common practice within infrastructure projects within the BRI framework. For instance, in 2016, the China Railway Construction Corporation (CRCC) proposed creating a binational company with Valec Engenharia to participate in a public bidding process for the FIO, following meetings between state authorities from both countries (Abdenur et al. 2021). This illustrates that, although Brazil has adjusted its development and infrastructure policies to accommodate Chinese capital, it retained leverage to forge partnerships driven by state entities with the capacity to directly shape development outcomes.

Nevertheless, Brazil's growing agency in its engagement with China does not necessarily translate into changes in investment or development models that would signal a broader shift in food-regime dynamics. In this sense, Chinese influence remains limited, and the political mediations associated with this new phase of engagement may lose momentum due to divergent investment approaches. A clear example is Brazil's Minister of Transportation, Mauricio Quintella, rejecting the proposal to create a binational company to operate the West–East Integration Railway, arguing that an open private auction or competitive bidding process was preferable to establishing a state-owned joint venture (Abdenur et al. 2021). While this stance partly reflected concerns over the lack of robust environmental and social commitments from Chinese partners, it also underscores Brazil's institutional preference for maintaining a regulatory framework that prioritises private-sector operations, particularly through concessions. An interview with a senior Brazilian official made clear that this preference, backed by the idea that free competition leads to transparency and efficiency:

In Brazil, infrastructure contracts, such as concessions, follow uniform rules: whether it's an American or Chinese company, both participate in bidding processes on equal terms: the winner is the one who presents the most efficient proposal. In railway concessions or multi-modal projects, obligations related to the establishment of subsidiaries, the formation of companies, or other contractual requirements are defined in an equal manner, without distinction based on the origin of the capital. (Interview 4, see Appendix)

Furthermore, according to an interviewee from Brazil's Ministry of Foreign Affairs involved in infrastructure planning and coordination, the Ministry aims to coordinate foreign

investments with local needs, promoting an agenda for local development that connects commercial routes to productive sites. This includes defining routes in China-partnered projects, such as the Bioceanic Corridor, in ways that balance areas local officials and civil society seek to protect for environmental reasons with those targeted for economic activities such as agriculture and mining. The ministry also seeks to attract Chinese investment for the transfer of productive technologies that can stimulate the local economy (Interview 1, see Appendix).

Another priority is to integrate national infrastructure planning into broader South American and BRICS cooperation frameworks. This agenda involves strengthening cooperation with the New Development Bank (BRICS Bank) to finance large-scale infrastructure and logistics projects. According to the Ministry of Regional Development, the partnership targets approximately R\$ 2.7 billion in investments focused on logistics, transport, and sustainability – with special attention to projects in the Amazon region. As noted by ministry officials, the collaboration with Brazil's Office of the Chief of Staff, aims to identify initiatives aligned with the bank's guidelines, including road concessions, railway terminals such as Transnordestina, FICO, and FIOL, as well as waterways and port developments (CNN Brasil 2025; Brazil 2025).

In line with this approach, the third Lula administration launched the Routes of South American Integration and Development Project (Figure 3), which allocates resources to infrastructure initiatives aimed at connecting Brazil's border states. An interesting statement by the Minister of Planning and Budget, Simone Tebet, reveals that these projects

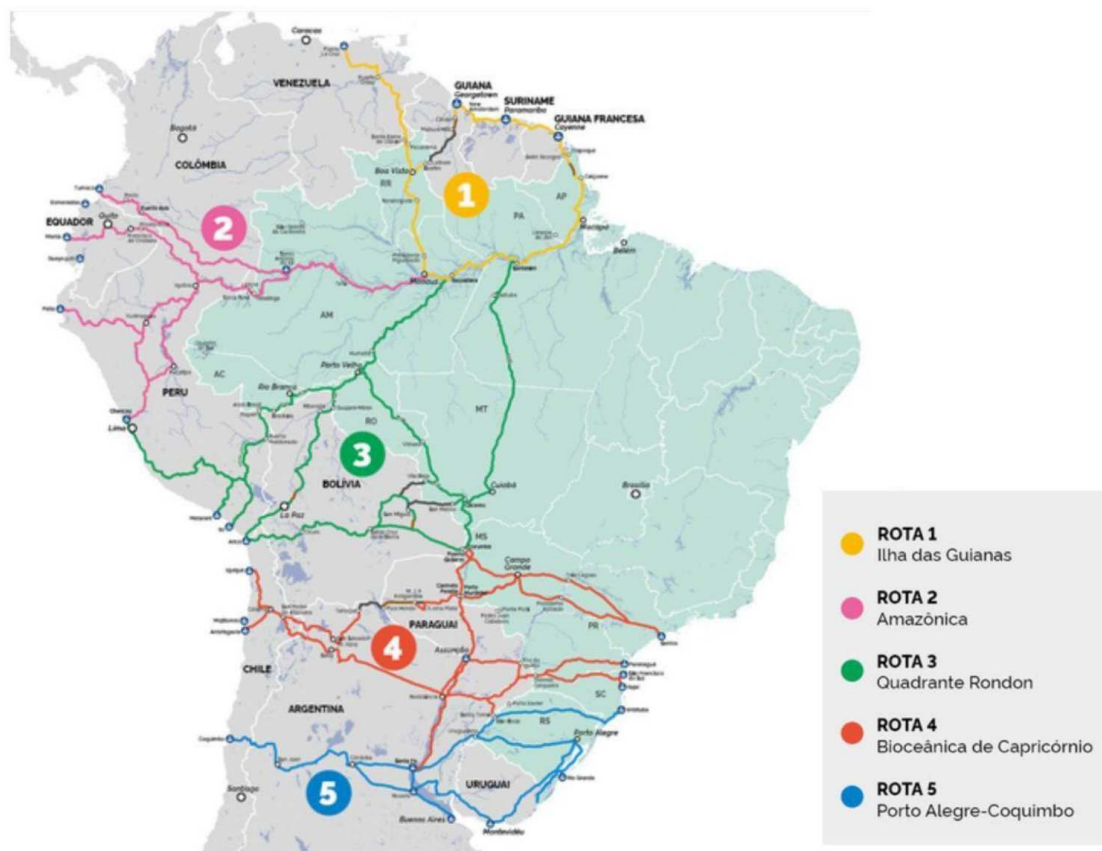


Figure 3. Routes of South American integration and development project.

Source: Ministry of Planning and Budget of Brazil (2024).

are not only intended to strengthen regional connections but also to facilitate the flow of exports through the Pacific. As she explains: 'We are going to make the agricultural products of Brazilian agribusiness – and I'm referring to the south of Mato Grosso, Mato Grosso do Sul, Paraná, the interior of São Paulo, and Goiás – more competitive, because they will reach Asian markets more quickly. We are talking about shortening distances' (MIDR 2024).

However, while these projects can strengthen regional economic linkages and stimulate local development, they also reproduce longstanding patterns of dependency. In fact, Chinese infrastructure investments are primarily designed to channel agrarian production toward export ports, generating limited spillover gains for local and regional economies. As a senior official from Brazil's Ministry of Foreign Affairs noted, 'China has shown little interest in fostering broader Latin American regional integration'. In this sense, as Chinese engagement reshape territorial landscapes to sustain global commodity flows, they reinforce the regional dependency on the primary economy (Giraudó 2019).

While Chinese infrastructure projects are sometimes framed as catalysts for local development, agendas advanced by local actors whose interests extend beyond large agribusiness are routinely overshadowed by the market imperatives structuring the corporate food regime. One civil society representative active in the Matopiba region remarked: 'There's been a significant increase in public investment in Matopiba – railways, roads, power transmission networks. These are beneficial to communities, but they are mainly designed to serve agribusiness, which is largely backed by foreign capital.' Another interviewee highlighted the FIOF railway as a clear example: 'It was planned to cut through the Matopiba region to serve the flow of agricultural commodities. Previous federal and state governments, from Lula to Bolsonaro, invested heavily in this infrastructure' (Interview 10, see Appendix). These accounts indicate that, despite reshaping the regional landscape, such projects rarely deliver substantial benefits to small producers or local communities.

The socio-environmental impacts of new infrastructure projects are also significant. They reinforce patterns of neo-extractivism that are economically unsustainable in the long term and deepen the region's dependency on export-oriented sectors (Burchardt and Dietz 2014, Giraudó 2019). By prioritising logistics that serve global commodity chains, these projects tie local economies ever more tightly to international markets and limit opportunities for diversified, domestically oriented development (Kato 2019). New transport corridors further facilitate the expansion of agricultural frontiers by encroaching on forested areas and exposing protected lands, including territories under the stewardship of Indigenous groups, which has been discussed in the case of the Ferrogrão railway (Monfort et al. 2025). This dynamic is amplified by the fact that transport infrastructure functions as a double-edged sword, catering simultaneously to agricultural expansion and to extractive industries such as mining.

By prioritising the free-trade logic advanced under large agribusiness dominance, the expanding role of the state within the contemporary food regime functions as a conduit of reinforced dependency (Burchardt and Dietz 2014). In other words, the state's relational dynamics potentially institutionalise mediations that reproduce entrenched dependency. Discussions on infrastructure in South America, particularly in the context of China's growing presence, reveal that these projects transcend their material dimension and play a central role in reshaping territory and economic relations (Larkin 2013, Easterling

2014, Teo et al. 2019). The development of logistical corridors oriented toward commodity exports reinforces existing spatial hierarchies across the territory. A telling example is the legal and political controversy over the Chancay Port in Peru. Built and operated by COSCO, the port was inaugurated in late 2024 and – despite judicial disputes and a challenge by the Peruvian port authorities – the country’s Congress passed a reform that potentially grants exclusivity in port services to private operators, thereby consolidating COSCO’s control over the terminal (Ellis 2024, Politi 2024; REDCAEM 2025)

The direct or indirect control over the territory is instrumental for the global projection of Chinese agribusiness. COFCO International’s operations in Brazil illustrate how infrastructure and trade logistics become instruments of geopolitical interest. At its São Paulo headquarters, a phrase inscribed in both Portuguese and Mandarin – ‘The control of food sources is the control of trade, and therefore of pricing’ – succinctly captures Brazil’s role within the company’s global strategy (Lopes 2019). COFCO’s investments in port terminals, storage facilities, and transport corridors, particularly the grain terminal at the Port of Santos, exemplify how Chinese agribusiness actors strategically embed themselves within Brazil’s export infrastructure to secure access and influence over global commodity flows.

In sum, the expansion of Chinese firms and conglomerates across Brazil’s agribusiness and infrastructure sectors reveals that Chinese state capitalism is constituted through negotiations that unfold across multiple scales, involving economic elites, technical bureaucracies, and regulatory institutions in Brazil. This domestic mediation acts as a political filter that shapes the effects of China’s presence, moving away from interpretations that portray China as a homogeneous and centralised actor, and instead aligning with approaches that conceptualise the state as relational and permeated by territorialised forms of governance. Consequently, China’s geoeconomic imperatives are filtered through the interests of host-country elites, who develop strategies to safeguard domestic priorities (Bervejillo and Wainwright 2025, Rensi and Fares 2025). This reflects dynamics of co-production, whereby Chinese and local actors jointly shape outcomes through ongoing processes of bargaining, negotiation, and accommodation (Oliveira and Myers 2020, Oliveira 2025).

At the same time, the findings show that this politicisation generates an ambiguous effect: the same mediation that broadens the involvement of national and subnational governments – allowing them to capture immediate benefits such as logistical infrastructure, productive investments, or technical cooperation – also contributes to reproducing Brazil’s subordinate insertion within the global food regime. In other words, China reconfigures the scale and mode of operation, but not the fundamental logic of the system. Investments remain oriented toward export corridors in the Global South, reinforcing primary-sector specialisation and the country’s central role as a commodity supplier to the Chinese market. The article’s contribution, therefore, lies in demonstrating that China does not inaugurate a new development paradigm; rather, it exposes how dependency is co-produced, negotiated, and continually updated through the articulation of Chinese interests with the strategies of Brazilian elites and institutions.

Conclusion

This article has argued that Chinese state involvement in Brazil’s agri-food infrastructure should not be understood as a straightforward expansion of state capitalism, but rather as

a process of strategic reconfiguration. This perspective suggests that Chinese engagement with the Global South has moved away from direct ownership and hierarchical control towards forms of infrastructure-led integration mediated through local political engagement. In this sense, Chinese expansion is co-produced through domestic institutional arrangements, regulatory environments, and corporate partnerships (Summers 2020; Szabó and Jelinek 2023). The geometry of (anti-)imperialism, to borrow Tirmizey's (2024) formulation, is therefore relational and multi-scalar rather than unidirectional.

We interpret this as a new phase in China's overseas expansion. Whereas earlier investments often concealed Chinese state-led political engagement behind market-oriented structures, the current phase reflects a more overtly strategic approach in Brazil. Yet the irony is that, although this repoliticisation is more relational and unfolds through multi-level political negotiations, it does not necessarily translate into greater agency the host country. On the contrary, Brazil's agri-food system becomes more deeply integrated into global circuits of production and circulation, thereby reinforcing its dependence on foreign markets and the influence of large agribusiness multinationals. Although state capitalism may no longer operate primarily through overt command and control, infrastructural entanglement can produce even more encompassing forms of dependency.

Rather than focusing solely on commodity flows or land control, Chinese investments in logistics, transport corridors, and export-oriented integration function as structuring mechanisms within agri-food systems (Wilkinson et al. 2016, Wesz Junior et al. 2023). Infrastructure, therefore, emerges as a central site of accumulation and geo-economic influence. Such investments are best understood as a composite category encompassing multiple modalities of engagement that extend beyond narrowly defined capital investment, becoming a mediating arena in which state strategies and corporate agency converge.

At the same time, this article has shown that China's new approach requires a degree of political alignment that cannot be taken for granted. Questions remain regarding how these dynamics might evolve under governments less favourable to China, such as far-right political forces, which in Brazil are associated with former president Jair Bolsonaro. Political alignment, however, is not determined solely by ideology or diplomatic orientation; it also depends on regulatory and governance arrangements. In this respect, the weakening of environmental regulations and the retreat of state oversight in host countries may facilitate further Chinese investment by opening new spaces for infrastructure expansion. As this repoliticisation unfolds through neoliberal and market-oriented forms of governance, it may prove less vulnerable to ideological shifts than previous forms of state-led engagement. These dynamics nevertheless warrant further investigation, particularly regarding how similar processes unfold across other regions in the Global South.

Note

1. The FETRAF-BA is a national federation of trade unions that works to strengthen family farming and advocate for the interests of family farmers across Brazil.

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Appendix

Interviews

Interview 1, 2025. Interview with senior official from Brazil’s Ministry of Foreign Affairs involved in infrastructure planning and coordination. Brasília, Brazil, 21 November 2025. Online interview.

Interview 2, 2025. Interview with Head of the Special Advisory for International Affairs, Ministry of Agrarian Development and Family Agriculture (MDA). Brasília, Brazil, 10 December 2025. Online interview.

Interview 3, 2025. Interview with official from the Ministry of Science, Technology and Innovation (MCTI). Brasília, Brazil, 26 November 2025. Online interview.

Interview 4, 2025. Interview with General Coordinator for Institutional Articulation for South American Integration, Ministry of Planning and Budget (MPO). Brasília, Brazil, 20 January 2025. Online interview.

Interview 5, 2025. Interview with Director of the National Institute of the Semiarid (INSA). Paraíba, Brazil, 01 December 2025. Online interview. Online interview.

Interview 6, 2025. Interview with Coordinator of the Latin America Programme, GRAIN. Rio de Janeiro, Brazil, 25 November 2025. Online interview.

Interview 7, 2025. Interview with Co-coordinator of the Latin America Programme, GRAIN. Bolivia, 20 November 2025. Online interview.

Interview 8, 2025. Interview with Senior Researcher, Latinoamérica Sustentable. Ecuador, 19 January 2025. Online interview.

Interview 9, 2025. Interview with Coordinator of the Human Rights Collective of the Small Farmers’ Movement (MPA) in Pernambuco. Pernambuco, Brazil, 11 December 2024. Online interview.

Interview 10, 2024. Interview with member of the Bahia State Coordination of the Small Farmers’ Movement (MPA). Bahia, Brazil, 20 December 2024. Online interview.

Interview 11, 2025. Interview with General Coordinator of the Federation of Family Farming Workers of Bahia (FETRAF-BA). Bahia, Brazil, 16 December 2025. Online interview.

Interview 12, 2025. Interview with Organizer of the Quilombola Movement of Maranhão (MOQUI-BOM). Maranhão, Brazil, 20 February 2024. Online interview.

Interview 13, 2025. Interview with member of the Women’s Articulation for the Cerrado of Western Bahia and Project Manager and Treasurer of the Community Association of Small Livestock Breeders of the Clemente Fecho de Pasto (ACCFC). Bahia, Brazil, 27 March 2024. Online interview.

Interview 14, 2025. Interview with official from the Embassy of Brazil in Beijing. Beijing, China, 6 August 2025. Personal communication.

Interview 15, 2024. Interview with official from the Embassy of Brazil in Beijing. China, 20 January 2024. Online interview.

Interview 16, 2024. Interview with representative of the China–Brazil Business Council (CEBC). Rio de Janeiro, Brazil, 10 December 2024. Personal communication.

Interview 17, 2025. Interview with coordinator of Brazil's Landless Workers' Movement (MST). China, 22 August 2025. Online interview.

Interview 18, 2022. Interview with Regional Logistics Manager at COFCO. Mato Grosso, Brazil, 14 October 2022. Personal communication.

Interview 19, 2022. Interview with Regional Origination and Marketing Manager at COFCO. Mato Grosso, Brazil, 14 October 2022. Personal communication.

Interview 20, 2025. Interview with Director of the Department of Russia, China and Central Asia, Ministry of Foreign Affairs. Brasilia, Brazil, 21 November 2025. Online interview.