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Article:
Vergara-Camus, Leandro and Fares, Tomaz (2027) The state of agribusiness: the politics of rentier strategies of Brazil's agribusiness, 2003 - 2025. The Extractive Industries and Society. 102089. ISSN: 2214-7918

https://doi.org/10.1016/j.exis.2026.102089

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The state of agribusiness: the politics of rentier strategies of Brazil's agribusiness, 2003 - 2025

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ARTICLE INFO

Keywords:
Agribusiness
Brazil
Rentier capitalism
Rentier state
Far-right
Lula
Dilma
Bolsonaro

ABSTRACT

This article analyzes the political strategy of Brazilian agribusiness from its alliance with Luiz Inácio Lula da Silva's Workers' Party in 2003 to its backing of Jair Bolsonaro in 2018, and its current ambivalence towards him since Lula began his third presidency in 2023. Building on recent political economy discussion around the rentier state and the category of rent, this article proposes a conceptualisation of the state as a space for wealth accumulation. Within the state, classes form hegemonic coalitions and deploy rentier strategies by not only building a discourse that aims to maintain or re-articulate hegemony, but also by striving for the control of key sectors of the state to better promote their economic interests. In doing so, it brings the critical cultural political economy perspective highlighted in this special issue to the agro-export sector and more specifically to the important role that the state has played in its expansion by providing it with nature, land, property and financial resources. The paper focuses on the impact that agribusiness has had on several agrarian and environmental policies through its legislative wing called the *Frente Parlamentar da Agropecuária*. The growing political and institutional influence of agribusiness reveals the state as a fundamental mechanism of rent extraction for agrarian capitalism, enabling radical agendas against Indigenous rights and environmental protection, and paving the way for further land expansion.

1. Introduction

Brazilian politics has been through tumultuous moments in the past ten years. The political pendulum has moved from the left to the right to the far-right, and then again to the left. This period was marked by the impeachment process in 2015 of President Dilma Rousseff, from the left-wing *Partido dos Trabalhadores* (Workers' Party, PT), to the attempted coup to challenge the presidential election results by former President Jair Bolsonaro on January 8, 2023. These dramatic events raised numerous questions as to the alignment of powerful economic forces behind the parties and politicians at the centre of these battles over power, especially because the governments of the PT had been very successful at pleasing the business sectors while reducing poverty. The actions of agribusiness throughout this period, because it represents one of Brazil's most powerful economic actors, have been subjected to contentious analyses. Welch (2018) and Pompeia (2024) highlight agribusiness support for the impeachment process, as well as the following governments of Michel Temer (2016-2018) and Jair Bolsonaro (2019-2023). While agribusiness has shown a remarkable ability to adapt and negotiate with whoever holds power, it has become increasingly cohesive and has radicalized its traditional demands for fewer restrictions on access to land and property limits, as well as more lenient environmental regulations. The rise of the far-right appeared to be part and parcel of this radicalization, but the silence of the main representatives of agribusiness and its allied politicians about Bolsonaro's coup attempt raises several questions as to the sector's long-term political strategy.

Although there are important differences with respect to its position vis-à-vis neoliberal policies, for example on free trade, between Western politicians and those in the Global South, the rise of the Far-Right worldwide has been marked by a convergence of authoritarian populism, the resurgence of culturally conservative ideas, and the reiteration of elements of market fundamentalism, like the critique of state bureaucracies, as a response to the crises of neoliberal globalization and liberal institutional politics. In Brazil, this resurgence has taken idiosyncratic forms. Bolsonaro's discourse often blends neoliberal economics, nostalgia for military dictatorships, anti-corruption rhetoric, nationalist appeals, backlashes against progressive social and cultural

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Received 20 January 2026; Received in revised form 20 October 2026

policies, and celebrations of the "traditional family".

Yet Bolsonaro's rise also reveals an important tension within the political coalition that brought him to power. Even though the great majority of the leading agribusiness representatives had supported Dilma's impeachment and benefited greatly from the policies of the Bolsonaro government, few of them supported him when he refused to accept the results of the elections and staged a coup on January 8, 2023. This apparent contradiction raises questions about the extent to which agribusiness's support for Bolsonaro reflected a broader ideological alignment with the far-right, rather than a primarily strategic commitment to policies that advanced its material interests.

Understanding this distinction requires placing Bolsonaro's rise within the longer trajectory of Brazil's political right. Mainstream right-wing forces have historically been anchored in conservative clientelist parties and politicians with little ideological coherence but strong ties to agribusiness and traditional regional elites. They have often coalesced into loose, opportunistic coalitions with the primary aim of remaining in power by securing votes, promoting the material interests of their backers, and preserving the status quo within Brazil's democratic institutions. Against this background, Luiz Inácio Lula da Silva's PT governments (2003-2011) navigated alliances with right-wing forces, though the impeachment of his successor Dilma Rousseff (2011-2016) marked a turning point in this dynamic.

With the rise of Jair Bolsonaro, the Brazilian traditional right has further radicalized, adopting a far-right discourse centred on a virulent anti-DEI (diversity, equity, and inclusion) agenda, strongly pro-business and anti-environmentalist positions, and a moral-religious fervour rooted in evangelical Christianity. Yet this ideological radicalization did not displace the traditional political networks through which agribusiness exercised influence. Bolsonaro's legislative agenda and re-election campaign received broad support from traditional clientelist right-wing parties such as PL, PP, União Brasil, PSD, and MDB, which today account for around 80 per cent of the membership of agribusiness' legislative group, the Frente Parlamentar da Agropecuária (Parliamentary Agricultural Front, FPA).[1]

Considering the clientelistic nature of the modus operandi of Brazilian traditional Right-wing and the constant renewal of policies supporting agribusiness no matter the party in power, the easiest explanation for this decision would be that Brazilian ruling classes were not ready to embark on the uncertain path that Bolsonaro was offering. The risk was too high because an unsuccessful coup would burn all bridges with Lula, who would still control several important levers of the coffers of the state for the coming four years. Also, the presidency is only one, albeit important, component of the Brazilian political edifice, and others remain under their control. This explanation is plausible, but it does not fully capture the tension between the established clientelist practices of the Brazilian right and the new far right expressions that have emerged under Bolsonaro. Understanding this requires a fuller examination of the cultural and political power of agribusiness, its strategies of wealth accumulation, and its incorporation into parts of the state apparatus. This broader critical cultural political economy perspective is what this article offers.

We argue that what glues together the different agrarian capitalist class fractions are the shared goals of securing a greater agricultural funding package and an ever-increasing agricultural frontier. These common goals enable far-right radicalization while cutting across internal divisions, allowing agribusiness to maintain its hegemony within civil society and the state. They also underpin its occupation of key state institutions, through which the sector is able to secure material advantages through public policies and state decisions. The first goal, as we will see, is reached through the legislative actions of the FPA, which ends up diverting important sums of the federal budget toward agribusiness. The second goal is reached by creating political conditions that allow for the territorial expansion of agribusiness, the cancellation of agrarian reform, and the end of indigenous land demarcation.

We draw on a dozen interviews conducted in early 2025 in Brazil with civil society organizations that investigate the role of agribusiness in Brazilian politics. These interviews, together with a range of Brazilian and international press articles, provide insight into how agribusiness has articulated its interests within the state and the broader socio-political impact of recent policy change. In addition, we compiled official discourses and policy statements from both the Workers' Party governments and the Bolsonaro administration using media reports. To assess the structural economic transformations of agribusiness in Brazil, we relied on publicly available statistical data from varied sources, such as the Central Bank of Brazil, the Ministry of Agriculture and Livestock, and the National Institute for Colonization and Agrarian Reform (*Instituto Nacional de Colonização e Reforma Agrária*, INCRA).

In the first section, we present our theoretical framework that understands the state as a space of accumulation of wealth in which class fractions deploy different strategies, notably what we call "rentier strategies of wealth accumulation". Here, we draw on Marxian theoretical insights about rent, as monopolistic power, Neo-Institutionalist ideas of market power and debates about the rentier state. In the second section, we present how agribusiness paved its path towards hegemony through its progressive consolidation within civil society, leading successive governments since 2003 to defend its interests and incorporate its top representatives in the Ministry of Agriculture and other important state positions. In the third section, we present the rise of authoritarian populism and argue that Bolsonaro's discourse represented an attempt to realign the existing hegemony toward far-right values. We contend that the lack of open public support from most prominent politicians and agribusiness leaders for the coup attempt suggests that Bolsonaro has not been successful yet in casting this new hegemony, or at least that agribusiness remains internally divided. We end the article by illustrating how agribusiness has patiently and systematically been developing a strategy of mobilising key actors within the state to generate policy results that are favourable to its general interests, although not always achieving its preferred policy objective.

2. The state, property, and rentier capitalism

The state is at the centre of rural politics. It is through the state that the most prized possessions of any rural subject, i.e. access to land and nature, have been granted, protected or transferred (Scott, 2017). There are a variety of approaches to the state, which could be said to derive from the three dominant approaches in political economy, namely Liberalism, Marxism and Weberianism, which lead scholars to understand the state respectively as an arbiter, an instrument of class power, or a rationalising agent of society. In critical agrarian studies, the scholarship on the state and rural politics has been moving toward a consensus in which the state is understood as a contradictory and non-unitary space where actors deploy their strategies across different scales and where different state institutions can enter into conflict with each other, depending on which group controls them. Moreover, class unity of rural classes vis-à-vis the state cannot be assumed but rather must be understood as politically constructed (Vergara-Camus 2021). In this article, we draw inspiration from Jessop's strategic-relational approach to the state, which views the state not as a fixed entity but as a social relation shaped by (and shaping) the strategic actions of political actors within a given structural context (Jessop 2007). We adopt a Marxist understanding of the state, which builds on the category of rent and the concept of the rentier state, to show how the Brazilian agrarian capitalist classes organize and occupy the state to deploy rentier strategies of wealth accumulation in pursuit of their common class interests. As opposed to investing in technology, restructuring the labour process, acting on wages or deploying publicity campaigns to

[1] The FPA is a powerful caucus of elected representatives in the National Congress and Senate representing agribusiness interests – traditionally known as the bancada ruralista.

increase sales, rentier strategies of wealth accumulation are political actions that seek to benefit from a politically determined standard, regulation, laws or policies. Our understanding of rentier strategies includes the acquisition or the maintenance of the ability to extract rent per se through the enforcement of monopoly access to (or control of) an asset, but more importantly, encompasses all the actions an economic actor can take to extract regulatory or financial advantages from the state. Examples of these could be property rights that benefit a type of ownership over another; laws that allow the collection of royalties from intellectual property; targeted or sectoral funding under favourable conditions; regulations that facilitate economic expansion of a specific sector; and regulated prices and quotas. As Brazilian agribusiness companies are known for their adoption of advanced technologies, this should not be understood as meaning that Brazilian agribusiness relies only on rentier strategies to increase revenues. Rentier strategies do, however, yield important benefits, warranting a clear long-term outlook and the mobilisation of substantial resources. Building on Jessop's broader strategic-relational framework and his work with Sum on cultural political economy (Sum and Jessop, 2013), we examine not only how agrarian capitalist classes strategically occupy the state, but also how they construct and mobilise nationalistic and developmentalist discourses to legitimise the policies they directly benefit from as serving the national interest.

Vergara-Camus has developed an understanding of the state, inspired in Marx's concept of ground rent, that highlights the importance of rent, the specific wealth accumulation strategies in the countryside and the place of the state within this process in Latin America (Vergara-Camus and Kay 2017a). In this article, we will limit ourselves to developing the idea of rentier strategies of wealth accumulation in the current neoliberal era and demonstrate how this phenomenon should be integrated into our understanding of the state and the strategies of dominant classes with respect to it and within it.

Marx's category of ground-rent highlights the crucial importance of property rights for wealth accumulation and wealth appropriation. Indeed, where property rights are effectively enforced and protected, landlords can either engage directly in agricultural production or extract rent from other actors seeking access to their land. Hence, that right to extract rent in exchange for the use of land for agriculture rests ultimately on a monopoly of access that is granted by the state. Ontologically, in the last instance in a capitalist society, all forms of capital accumulation rest on the politically selective enforcement of (and limits to) private property rights by the state. Hence, Marx's category of ground rent points to the highly undemocratic nature of capitalist society and the decision-making process within the capitalist states, which requires us to identify the different rentier practices that are constantly reproduced within it. Marx's category of ground-rent is one that most strikingly brings out the political nature of capital accumulation, especially of sectors that directly rely on access to land, territory and resources. Focusing on the role of the state – and using ground rent as an analytical starting point – is particularly appropriate to understand the dynamics pertaining to extractive industries because their operations rest on (and/or trigger) rentier practices that require the constant commodification of nature and intervention of the state.

Drawing inspiration from Juan Iñigo Carrera (2008b), a group of scholars studying the political economy of Latin America, including Nicolas Grinberg, Guido Starosta, and Thomas Purcell, have developed an approach to global capitalism revolving around the appropriation and circulation of ground rent within the production of surplus value, both nationally and globally. As an alternative to dependency theory's emphasis on unequal exchange, this approach draws on Marx's concept of differential ground rent and absolute ground rent to deduce the amount of ground rent that is appropriated or transferred across economic sectors. These transfers can be appropriated by landowners, whose rents vary according to different degrees of fertility or mineral content of their landholding. But a portion of it can also be transferred to other sectors through the production and exchange of commodities. That portion will vary according to the price paid for ground-bearing commodities (Iñigo Carrera, 2008: 10-15; Grinberg, 2010, 187-188). Depending on the structure of an economy, the model of development, and the economic conjuncture globally, there are transfers of value among sectors at the local and global levels. Hence, within the process of production and realisation of value, landowners, agricultural producers, industrial capital, or finance can appropriate or have to pay for a certain amount of ground rent when purchasing ground rent-bearing commodities. Within this model, the development of a nation-state is determined more by its structural position within the global division of labour than by the policies adopted by a particular state (Grinberg, 2010: 186; Grinberg and Starosta, 2009). This follows from understanding capital as the fundamental subject of the capitalist mode of production, with state policies shaped by, rather than independent of, the structural imperatives of capital accumulation. Nevertheless, states mediate these dynamics through specific forms of intervention. Grinberg for instance identifies the types of policies – such as the overvaluation of the national currency, export taxes, taxes on primary sector production, state regulations of primary sector commodities' domestic and international trade, state monopoly on primary commodity trade, credit to landowners at preferential rates, programmes supporting primary commodity producers – which allow the appropriation of ground rent contained in primary commodities by an actor or its transfer from one sector of the economy to another (Grinberg, 2013:456-463).

As compelling as this approach might be to analyze the structural inequalities of global capitalism, the way it conceptualises ground rent and its transfer and circulation among sectors, as well as its understanding of the agency of the state, differs substantially from the approach adopted in this article. This article is interested in understanding the agency of agribusiness toward and within the national state, especially through the mobilisation of a political strategy and a cultural hegemony, which pushes the state to implement the type of policies correctly identified by Grinberg. Theoretically, we believe the recent revision of the concept of rent as monopoly power and market power provides a fruitful conceptualisation for the objective of the article.

2.1. Recent discussion on rent and rentierism

Even though the use of the category of ground rent is self-evident for agriculture and other extractive industries, a broader category of rent that highlights what monopolies can yield is also very useful to understand the workings of markets under neoliberalism. It uncovers the expansion of forms of accumulation of wealth linked to the enforcement of private property rights, which have unfolded under its aegis. Neo-institutionalist economists have come to recognise the monopolistic or oligopolistic nature of advanced capitalist economies and have revived the category of rent, understanding rent-bearing assets "as those characterized by monopoly power, not just in ownership or control… but also in terms of their commercialization on the market (Christophers 2022, xxiv)". For many of them, rent-seeking today would be more important to increase revenues and profits than innovation. Joseph Stiglitz (2019) argues that large corporations such as Microsoft and Facebook accumulate market power through their scale, revenues, and control over intellectual property, enabling them to fix prices and erect barriers to entry, often reinforced through mergers and acquisitions. Crucially, he emphasises that state policies and sectoral regulation play a decisive role in determining which firms benefit from such market power. Thomas Piketty (2017; 2019), focusing on household income and wealth distribution rather than market structure, similarly highlights the rentier character of contemporary capitalism. Drawing on extensive empirical data, he shows that neoliberalism has driven rising inequality as returns on capital consistently outpace economic growth, a trend reinforced by wealth concentration and declining public ownership. He characterises this system as patrimonial or hypercapitalism, marked by extreme concentration of property and the dominance of inherited

wealth.

Adding to this literature and critique, Marxist scholar Brett Christophers has recently published a book entitled *Rentier Capitalism*, where he combined Marx's understanding of rent with that of neo-institutionalist economists to characterise the economy of the United Kingdom. He adopts the following definition of rent:

"a payment to an economic actor (rentier) who receives that rent – and this is the key factor – purely by virtue of controlling something valuable. The 'something', whatever it happens to be, is referred to generally as an asset: an item of value owned (…) that is valuable precisely in view of the fact that control over it endows the owner with the capacity to generate future income" (Christophers 2022: xvi)…

… an income derived from the ownership, possession or control of scarce assets under conditions of limited or no competition (2022: xxiv).

Christophers argues that there are seven forms of rents, associated with the ownership or control of seven types of assets: financial rents, natural resources rents, intellectual property rents, digital platforms rents, services contract rents, infrastructure rents and land rents. He reminds us, however, that not all the income of rentiers are rents, but what is important to underline is that "rentierism consists… in scarce and exclusively controlled assets being not just leveraged in production but substantially so – that is, in such a way as to materially influence the nature of the economic activity and the amount of income it generates (2022: xxvi, our emphasis)".

Although our purpose in the article is not to adopt Christophers' definition, to scrutinize the way the Brazilian economy is structured and how different actors extract rents in the different sectors of the economy, we coincide with Christophers' and neo-institutionalist economists' argument that controlling the market and influencing the nature of economic activity and state policies is crucial for capitalists. For us, this means that capitalist rentiers are not only rent-seekers benefiting from already existing rents, but they are "rent-creators" through their actions vis-à-vis other classes on the market or by making sure the state implements certain policies or regulations or grants some form of targeted funding. However, this calls for a specific theorization of the state that allows us to scrutinise the political strategies of classes and fractions of classes within the state, which we call "rentier strategies" that seek to produce state policies and decisions that increase their wealth.

2.2. The state, the appropriation of nature, and rentier strategies

To investigate the rentier strategies of agribusiness or any other actor for that matter, we must examine the different ways in which scholars have theorized the role that the state plays in the commodification of nature and in the appropriation of natural resource wealth. When reviewing the scholarship on the state, two strands of literature appear relevant: the Neo-Weberian one, working with the concept of rentier state and the Marxist one, working within the primitive accumulation tradition.

Neo-Weberian Institutionalists have been among the most prolific in the examination of the relationship between natural resource wealth and state formation with the concept of rentier state. Terry Lynn Karl's The Paradox of Plenty (Karl, 1997) is a foundational work on rentier state theory. Through a comparative study of Algeria, Indonesia, Iran, Nigeria, Norway, and Venezuela, Karl argues that petro-states develop a distinctive form of "stateness" because their primary source of revenue is oil rather than taxation, rendering them rentier states. She shows that development failures often stem from the coincidence of oil discovery with early stages of state formation, when political and administrative institutions are weak. Rejecting resource determinism, Karl emphasises that policy choices and timing are decisive in using resource rents to diversify the economy and avoid the paradox of plenty. Although focused on oil exporters, she suggests her framework applies broadly to countries heavily dependent on a single natural resource. Subsequent scholarship has mainstreamed the rentier state concept, with liberal accounts arguing that resource dependence fosters rent-seeking and weak entrepreneurship by reducing the need for taxation and fiscal accountability (Chaudhry 1994; Moore 2004; Weyland 2009).

The Achilles heel of most of the studies of rentier states is the almost complete lack of attention to the global political economy, especially the role of transnational corporations and core capitalist states in the underdevelopment of most resource-rich countries. The second major limitation is the complete absence of any discussion on the role of the state in the appropriation of nature by economic actors and the environmental consequences of this. Most surprisingly, given the fact that most of the literature is on oil-producing countries, is that, within this very important field of research and policy recommendation, even the recent discussion on the rentier state happens as if climate change is not a reality. A third limitation, reproducing a classic Weberian *a priori* assumption about politicians, entrepreneurs, and bureaucrats, is that it associates rentier practices with corrupt politicians and presents professional autonomous bureaucracies as the antidote to this situation (Vergara-Camus 2021; for an example of this, see Hertog 2010).

Marxists, on the other hand, have highlighted long ago the role of the state by reminding us that the whole edifice of bourgeois rule stands on the initial wave of primitive accumulation, when the state establishes private property rights over land and nature. However, this moment of original sin fades into the distance as the decades of bourgeois rule succeed each other to the point of making property over nature a simple fact of life. Neoliberal restructuring has brought primitive accumulation again to the forefront of critical discussions because so many of the market and state restructuring processes have been spearheaded by privatisation and commodification (Harvey 2003). By building on Marx's writing on primitive accumulation, Neil Smith's idea of the production of nature and Foucault's idea of biopower, Parenti argues that in environmental terms, the role of the capitalist state is to deliver non-human nature to capital (Parenti 2015). It does so by delivering nature's use value (ability of land to produce food) to capital so it can valorise it (invest capital and technology, deploying labour) and turn it into exchange value through rents and profits. Practically, the state delivers non-human nature because it can use its territorial control and its geopower to "make territory and the biosphere accessible, legible, knowable, useable… exploring, describing, cadastral surveys; building roads, canals, dams, railroads, telegraphs; establishing, property rights, borders, policing and identification systems; scientific, surveys, and all the applied natural sciences, like botany, agronomy, and geology (2015: 837)". Parenti's approach highlights how throughout the history of capitalism nature must be produced by the state for the needs of capital accumulation. It could easily fall into a functionalist understanding in which the state will always do it, and not in response to the pressures and strategies of particular capitalist actors. His approach is also silent on the power that accrues to capitalists or the state itself once they are able to gain exclusive control over nature.

We believe a synthesis is possible between the concept of rentier state and the role of the capitalist state in providing nature for capital through the deployment of the category of rent. There are several advantages of using Marx's category of ground-rent as a stepping stone for the analysis of agrarian issues and extractive industries (Vergara-Camus and Kay 2017a, 247–48). For the purpose of this article, we will simply highlight three. First, the category of rent recovers Marx's identification of the three sources of wealth under the capitalist mode of production (the trinity formula), which should be the basis of a triadic dialectic structured around capital, ground-rent and labour (Coronil, 1997). Second, it brings out the political dimension of the process of accumulation and appropriation of wealth and capital, which necessarily needs to include the way actors represent themselves and the world around them and build discourses and projects to further their interests and justify their actions. Third, it places the state at the centre of the process of appropriation of nature and wealth accumulation.

The theoretical perspective on the state that we offer in this article builds on the idea that the state must be understood as a space for the appropriation of nature and accumulation of wealth key site through

which these processes unfold. It is a space where actors deploy rentier strategies to either negotiate the payment of rents, extract rent from other actors, or gain access to the officials or institutions that take political decisions that will increase their revenues. As Neo-Weberians argue, some states are thus rentier states because they rely heavily on their ability to extract ground-rent in exchange for exploitation rights of natural resources, a characteristic that generates rent-seeking strategies among numerous actors. But, beyond that argument, rentier strategies of accumulation are also important within states that are not typically rentier states because state regulations and policies are at the centre of the process of the appropriation of nature and market power.

Building on this understanding, our framework conceptualises the state as both a strategic arena and a relational space in which economic and political actors continuously negotiate, contest, and consolidate their interests. In this perspective, the state is not a neutral arbiter but a site where class-based strategies are enacted, and where rentier logics intersect with broader developmental and nationalist discourses to shape policy outcomes. By combining Jessop's strategic-relational approach with our focus on rentier strategies, we can examine how agrarian capitalist classes in Brazil not only secure access to the state to capture a broader share of state funding but also actively construct the ideological and institutional conditions that make such accumulation legitimate and politically sustainable. This dual focus on material rent capture and creation and discursive legitimation highlights the interdependence of economic and political strategies, showing how the state mediates the structural conditions of accumulation while remaining a terrain of contestation. In this sense, rentier strategies are dynamic and context-dependent, reflecting the interplay between institutional structures, historical contingencies, and strategic action.

3. The rise of authoritarian populism, hegemonic realignment, and agrarian capitalist class divisions

This section analyzes agribusiness's hegemonic influence over Brazil's development model from the first PT governments in 2003 to the present, focusing on the rentier strategies underpinning this dominance. Although agribusiness brings in a substantial amount of foreign currency desperately required to service Brazil's foreign debt, its power and influence do not simply rest on this. It rests on a deliberate long-term political strategy. This section traces how agribusiness shaped state concessions and positioned itself within key political moments, including Dilma Rousseff's impeachment, Bolsonaro's election, and Lula's return to power. While Bolsonaro's presidency marked a radicalization of agribusiness demands, the sector's hegemony did not fully converge with far-right ideology. Instead, Bolsonaro's rise is interpreted as an attempt by certain factions to consolidate and rearticulate agribusiness hegemony along more radical lines, rather than as a wholesale adoption of his discourse by the sector as a whole.

Since the 2000s in Brazil, core agricultural subsectors, such as soy, agrofuels, livestock, meat, and fruits have grown markedly by plugging into global trade and financial circuits, yet their consolidation has relied heavily on robust public support (Flexor and Leite, 2024). Expansion has been driven by the opening of new agricultural frontiers and by the strategic market power of leading multinational and domestic firms. Large-scale soybean cultivation, for example, has spread rapidly across the *Cerrado* – the vast tropical savannah of Brazil's midlands – while incorporating small- and medium-scale producers nationwide (Niederle and Wesz Jr., 2021). Once deemed marginal for farming, the Cerrado has been transformed into a major production hub through a mix of tax incentives, subsidized credit, infrastructure investments, and technological breakthroughs such as improved seed varieties. The same frontier model, often preceded by cattle pasture, is now advancing into forested regions of Mato Grosso, Amazonas and Pará, as well as the MATOPIBA belt spanning Maranhão, Tocantins, Piauí, and Bahia.

Following a drastic de-industrialisation in the 1980s and 1990s, the consolidation of large-scale agribusiness has been framed as a strategy to promote national economic development by positioning Brazil as a global agricultural powerhouse – most recently through deepening commercial ties with China (Rensi et al., 2026; Flexor and Leite, 2024). This project gained traction in the late 1990s with the approval of the Kandir Law, which exempted primary-sector exports from state-level taxes, and with a broader market liberalisation that welcomed multinational agribusiness investment. Momentum accelerated in the 2000s and 2010s, particularly under the influence of Roberto Rodrigues – often regarded as the chief ideologue of Brazilian agribusiness – who served as Minister of Agriculture in President Lula's first administration (2003-2006).

The first two PT governments of Lula and that of Dilma Rousseff (2003-2016) were built on a broad political coalition that included both leftist allies and centre-to-right parties, as well as numerous civil society movements and organizations. However, despite carrying out an extensive land redistribution and working with social movements like the Landless Rural Workers' Movement (MST) and the *Confederaçao Nacional dos Trabalhadores na Agricultura* (CONTAG), Lula's government adopted a pragmatic stance, utilising the bulk of his agricultural budget (around 85 per cent) to support agribusiness with credit, infrastructure, and trade promotion, while orienting a much smaller portion (around 15 per cent) to smallholder family farming (Vergara-Camus and Kay 2017b).

Rather than indicating a straightforward capture of the state by agribusiness, this pattern illustrates the strategic-relational character of the Brazilian state: PT governments accommodated competing class interests, while the distribution of state resources nevertheless reproduced the structural advantages of agrarian capitalist classes. This accommodation was also evident in the PT's political positioning. Throughout their administrations, the PT adopted the hegemonic pro-agribusiness nationalist discourse, deploying it in different international forums, such as at the United Nations' General Assembly meetings and the World Trade Organization (WTO). Lula, in particular, actively championed the Brazilian sugarcane ethanol industry as a global solution to energy insecurity and climate change, forging bilateral agreements, notably with the United States (Vergara-Camus 2014). In fact, as we will see, the General Assembly of the United Nations has become a privileged arena for Brazilian presidents to defend and promote their agribusiness model and respond to its critics, to the extent that anyone questioning the sector can easily be portrayed as anti-patriotic.

The core of this hegemony, articulated first by agribusiness and reproduced through state discourse, presents agribusiness as modern and sustainable, market-led and autonomous, a provider of thousands of good-paying jobs, and a supporter of local communities. As Gramsci would have it, agribusiness has reached a level of hegemony in which the common sense within the population is that what is good for agribusiness is good for Brazil. With the PT in power, this hegemony was not put into question but only made milder through the inclusion of some historical critiques from the left, such as the need to accept limitations on private property over land, as well as a call for land distribution to marginalized sectors of the countryside and targeted policies for small-scale family farmers on the basis of a social justice agenda. But agribusiness's hegemony continued to impose itself, and as a sign of its importance, agrarian reform slowly disappeared from the public arena during Dilma Rousseff's presidency, and there is no longer even a policy discussion around it (Lerer, 2025).

Yet instead of simply relying on favourable state policies, agribusiness also actively worked to consolidate its hegemonic position within Brazilian society. It increasingly presented itself as the backbone of the national economy, captured in the popular slogan often uttered by representatives of the sector in the public sphere, "*o agronegócio carrega o Brasil nas costas*" ("agribusiness carries Brazil on its back"). The slogan reinforces the notion that the country's economic stability is fundamentally tied to the sector's success. This ideological dominance has been cultivated through sustained campaigns that have helped agrarian capitalist classes achieve a culturally hegemonic position in Brazilian

society. A striking example is the campaign "*Agro é tech, agro é pop, agro é tudo*" ("Agro is tech, agro is pop, agro is everything"), launched in June 2016 by Brazil's largest media conglomerate, the Globo Group. Backed by agribusiness financing, the campaign deployed advertisements and TV segments that consistently portrayed agribusiness in a highly favourable light, emphasising its technological innovation and alleged commitment to sustainable development (Gomes dos Santos, Viturino da Silva, and Nunes Maciel 2019). A prominent expression of this cultural dominance is the rise of *sertanejo*, a rural music genre like the United States' country music that has become the most popular in Brazil (O Globo 2024). In agricultural regions, all these elements come together in major agricultural fairs, which reinforce agribusiness's symbolic centrality by functioning as political stages where economic interests, cultural symbols, and ideological narratives converge (Pompeia 2021).

In recent years, as a response to the economic crisis and decreased fiscal capacity of the th Brazilian state to maintain its balancing act, far-right-wing forces have been attempting to lead a sharp ideological realignment within rural dominant classes that initially manifested itself in the 2016 impeachment of Dilma Rousseff, which led to the interim presidency of Michel Temer, and the subsequent rise of Jair Bolsonaro. This attempt implied consolidating a hegemonic discourse based on agricultural export-led growth and the economic, social and even sustainable virtues of large agribusiness, while infusing it with, or re-articulating it toward, a far-right project that fuses radical market liberalism, authoritarianism and reactionary cultural politics.

Michel Temer's interim presidency marked a significant shift in Brazil's agrarian policies, rewarding the support of the agribusiness sector and the FPA during Dilma's impeachment. He appointed Blairo Maggi, owner of Amaggi and nicknamed the 'King of Soybeans', as Minister of Agriculture, overseeing radical policy reversals, including weakened environmental licensing, reduced conservation areas, and cuts to support for small-scale producers. Temer abolished the Ministry of Agrarian Development (MDA), transferring many of its responsibilities to the newly created Special Secretariat for Family Farming and Agrarian Development (SEAD), which was placed under the Presidency. At the same time, the federal agency responsible for implementing agrarian reform and administering rural land policy, INCRA, was reorganized within this new institutional structure (Welch, 2018: 119–120). This significant policy shift, however, did not include an equivalent modification of the ideological framing of the agribusiness hegemony.

This changed during Bolsonaro's presidential campaign and the attempt to reframe the agrarian hegemonic discourse came to define his presidency (2019-2023) to the point that Caio Pompeia (2024) has called it "*agri-bolsonarism*" – an ideology that marries neoliberal prescriptions of deregulation and fiscal austerity with ultra-conservative values, which are pro-gun, anti-Indigenous, anti-LGBTQ+, and aggressively "pro-family" with strong support for the industrial agricultural sector. In his government, this ideological shift materialized in the combination of traditional figures of the political establishment with individuals associated with the most far-right sectors of the countryside. Bolsonaro named Tereza Cristina Correa da Costa Dias, former president of the powerful Confederation of Agriculture and Livestock of Brazil (*Confederação da Agricultura e Pecuária do Brasil*, CNA), and former federal member of the lower chamber with a long history of supporting the deregulation of agrochemicals, as head of his Ministry of Agriculture. He also named Luiz Antônio Nabhan Garcia, former president of the União Democrática Ruralista (UDR), infamous for its violent opposition to land occupations by landless rural workers' movements, as his Secretary of Agrarian Affairs, who would be responsible for land titling, legalisation and agrarian reform. This distinguishes Bolsonaro from Temer, as his ideological re-articulation combined the traditional appeal to agribusiness patriotism with new elements, notably anti-leftist scaremongering that associated the PT with Cuba and Venezuela; a stronger emphasis on evangelical religiosity and traditional family values; and a romanticized rural morality in which the countryside was portrayed as the virtuous antithesis of supposedly "degenerate" urban life.

During his speeches at the United Nations General Assembly, Bolsonaro repeated some of the key messages of former Brazilian presidents, including those of Lula on many occasions, but added his own far-right content. In 2019, he attacked foreign countries, individuals and NGOs for manipulating indigenous people of the Amazon, blocking their development, and having a hidden agenda to benefit from their biodiversity and natural resources instead of promoting environmental sustainability. In 2021 and 2022, he reminded the world that Brazilian agribusiness feeds a billion people across the world, does so on less territory than any other country, and that it is a leader in sustainable development. This time, the difference with respect to the previous administration was in his attack on "socialism" and his defence of economic freedom or what he calls "liberty". In August 2022, in an hour-long disarticulated speech in front of the CNA, he moved from one key theme to another. He reminded his audience of his faith in Jesus Christ, which saw him through the assassination attempt that he suffered in September 2018, criticized "gender ideology" for forcing priests to marry gay people, pointed to how minoritarian these types of ideas were, and argued that "a country with de-structured families is destined to failure". The enumeration of these themes is not trivial. They are an attempt to realign the agribusiness hegemony with conservative ideas. But as far as agrarian issues are concerned, Bolsonaro's efforts to rearticulate agribusiness hegemony represent a radicalization of earlier defences of private landownership, particularly through his explicit calls for the use of arms to protect private property.

As we will see in the next section, as agribusiness deepened its political embeddedness and consolidated its hegemonic position, its consolidation created space for radicalized discourses against those who challenge its project. This convergence between agribusiness and authoritarian populism fuelled a combative stance against social movements and institutional frameworks for environmental protection and indigenous land rights. Its legislative expression has been increasingly coercive. As early as September 2019, President Bolsonaro had signed a decree allowing armed landowners to carry weapons anywhere on their properties – a measure widely criticized for fuelling violence against Indigenous communities and landless rural workers (Vivas 2019). That same year, FPA legislators revived efforts to classify the Landless Rural Workers' Movement (MST) and the Homeless Workers' Movement (MTST) as terrorist organizations under Brazil's Anti-Terrorism Law (Macedo 2018; Sauer and Mészáros, 2017). They repeated the process in 2023.

While the rise of authoritarian populism during Bolsonaro's presidency could have signalled a successful hegemonic reframing around a radical conservative political project, this is not clearly the case yet, as agrarian capitalist class fractions remain internally divided and display a high degree of pragmatism and opportunism in the context of changing political circumstances. To characterise this division, Caio Pompeia (2023) has identified five distinct "faces" of agribusiness – denialist, conservative, volatile, decarbonizing, and European – each reflecting a different orientation toward climate policy, Indigenous land rights, and integration into global markets, which are adopted by different sectors of agribusiness to respond to the changing conjuncture and balance of power. In other words, these faces could be understood as different "masks" adopted by agribusiness fractions in response to changing political circumstances.

The "denialist face" of agribusiness emerged around cattle ranchers and mid-sized soy producers backing Bolsonaro, rejecting climate science, opposing environmental regulation, and resisting Indigenous rights. The "conservative face," led by the CNA, adopted a more moderate tone while supporting Bolsonaro, prioritising legal stability and exports but often aligning with radical actors to weaken environmental and Indigenous protections. The "volatile face," represented by ABIOVE (the Brazilian Association of Vegetable Oil Industries) and major soy

traders, publicly endorsed sustainability initiatives such as the Soy Moratorium[2] while quietly backing deregulation and land policies hostile to Indigenous and quilombola rights. By contrast, the "decarbonizing face," centred on the Brazil Climate, Forests and Agriculture Coalition, promotes deforestation reduction and greener supply chains, with limited support for Indigenous rights. Finally, the "European face" includes downstream financial and retail actors that commit rhetorically to zero deforestation but largely focus on reputational risk management rather than structural change.

3.1. The January 8th coup attempt: not worth the risk for dominant agrarian capitalist class fractions

In the context of the rise of authoritarian populism, the more radicalized factions within agribusiness have gained increased political prominence, which has amplified the impact of their actions. This is most evident in the participation of the "denialist face" in the coup attempt during President Lula's inauguration. Their leaders – most notably Luiz Antônio Nabhan Garcia, who was Bolsonaro's secretary of agrarian affairs, and Antônio Galvan of Brazilian Association of Soybean Producers (Aprosoja) from the Mato Grosso state branch – have emerged as key figures within Bolsonaro's ruralist base. As subsequent investigations have shown, the first two played a crucial role in supporting the pro-coup mobilisations that culminated in the storming of federal buildings on 8 January 2023, providing funding, logistical coordination, and political cover for these anti-democratic actions (Resende, Cassela, and Vianna 2023; Castilho et al. 2023).

However, the bulk of the political class, parliamentary leaders and governors, even those from agribusiness states, as well as agribusiness's key figures, did not openly support Bolsonaro's coup attempt. For dominant agrarian class fractions, supporting Bolsonaro was not worth the risk, as the return of Lula to the presidency most likely did not mean a significant reduction in support for agribusiness, especially considering their political strategy within the state. Therefore, assessing the prospects of the far-right authoritarian group and its alliance with sectors of agribusiness in today's Brazil demands attention to how agrarian capitalist classes operate through the state. The radicalized discourse of some sectors of agribusiness coexists with a pragmatic readiness of others to recalibrate alliances as governments change. Different groups within agrarian capitalist classes continually compete for influence. Their shifting coalitions produce a policy landscape in which political commitments advance, stall, or reverse depending on the momentary configuration of forces, as emphasized in Jessop's strategic-relational approach.

For this reason, Pompeia's typology of agribusiness positions on the environment, Indigenous rights, and global market integration should not be seen as static. Actors frequently shift between stances, and the prominence of each position fluctuates in response to changing political and institutional dynamics. A clear illustration is Blairo Maggi, a central figure of what Pompeia (2023) calls either the volatile or decarbonizing faces of agribusiness. Although Maggi publicly supported Lula instead of Bolsonaro in the 2022 presidential election, like much of the sector's elite, he remained silent in the face of Bolsonaro's 8 January 2023 coup attempt on Brazil's federal institutions. This collective stance could be interpreted as institutional silence (Castilho et al. 2025), but we prefer to understand it as an example of agribusiness' classic pragmatism, because as a bloc it is confident that it holds most of the institutional cards in its hand.

As a rule of thumb, agribusiness elites tend to adopt a pragmatic stance when immediate economic interests are at stake, leading them to negotiate with the government in power, while maintaining their long-term goals. For example, in order not to leave anything to chance as Lula took office for the third time, the association Aprosoja, whose members had suffered severe crop losses in the 2023/24 season, changed its traditional "denialist face" and removed its hard-line president Antônio Galvan, who had supported the failed coup attempt. They replaced him with Maurício Buffon, who immediately opened dialogue with Lula's administration to achieve debt relief for soybean producers (Rossi and Camargos 2024). Yet this willingness to negotiate with Lula did not signal a broader political realignment. In September 2025, 78% of agribusiness representatives affiliated with the FPA voted in Congress to reduce Bolsonaro's prison sentence following his conviction for his role in the coup attempt (Núbia 2025). The episode therefore illustrates how pragmatic engagement with the government of the day can coexist with the preservation of longer-term political commitments.

To unpack this complex dynamic, the following section highlights how agribusiness's rentier strategies of accumulation underpin its political influence and capacity to protect its interests.

3.2. Agribusiness power: the slow and steady work of the FPA

The pragmatic and opportunistic posture of Brazil's agribusiness and its ambivalence toward Bolsonaro is underscored by a deep-seated political strategy of seeking privileged access to the state and occupying it. This strategy rests on institutional mechanisms that foster cohesion across a diverse set of actors while enabling the sector to project its collective interests into the political sphere. As Mendonça and Oliveira (2025) argue, this political embeddedness reflects agribusiness's capacity, through the consolidation and coordination of sectoral associations, to translate its influence in civil society into influence within "political society." This process combines the production of ideological consent with the occupation of strategic positions within the state apparatus, allowing agribusiness to exercise influence both from outside and within the state (Mendonça and Oliveira, 2015).

Although landowners and agrarian capitalist classes have historically been integral to political power in Brazil, the current path of gaining larger influence in the state took shape in the late 1990s and early 2000s. During this period, agribusiness groups organized politically to both support and pressure governments in pursuit of financial backing. Leading actors established associations such as the Associação Brasileira do Agronegócio (Brazilian Agribusiness Association, ABAG, founded in 1993) and Aprosoja (founded in 2005) to advance their interests, while the more hardline União Democrática Ruralista (Rural Democratic Union, UDR) mobilized through direct actions to resist land reform. By examining the consolidation of ABAG, Mendonça and Oliveira (2025) show that agribusiness's organizational development emerged in response to a traditional, non-financialized productive structure and its fragmented institutional environment, characterized by a constellation of scattered rural associations. At the same time, these developments formed part of broader efforts to construct a supra-associative network capable of pursuing influence individually through policy negotiations and collectively within the legislative arena.

This organizational consolidation provided the foundations for the growing institutional role of the FPA, whose influence has expanded significantly over the past two decades, both in parliamentary presence and in its capacity to shape public policy (De Olho nos Ruralistas, 2022). This institutional consolidation reflects not just agribusiness's dominance as a hegemonic economic bloc, but also its strategic ability to coordinate across party lines in defence of sectoral interests. This is signalled through the FPA's current capacity to exert control not only in the more evident Agriculture Commission and the Environment Commission of the Parliament, but also in less evident but in no way less important Constitution and Justice Commission (CCJ). These strategic placements allow the FPA to shape legislative agendas and steer discussions on land use, agriculture, and environmental regulations (Amado 2023).

Since the late 2000s, the FPA has become a magnet for legislators, many of whom join to boost their performance metrics – such as bill

[2] The Soy Moratorium is a multistakeholder agreement to stop buying soy grown on land deforested in the Amazon after 2008.

sponsorship and visibility in agricultural committees – and to enhance their standing with rural and conservative constituencies (personal interview, 9 January 2025). With the rise of authoritarian populism and the consolidation of "agri-bolsonarism," the parliamentary front has more than doubled in size, now encompassing over half of the Chamber of Deputies and Senate, including a few members of the PT (Souza 2023) (Figs. 1 and 2). At the same time, the FPA's institutional centrality has come to rival, and at times surpass, presidential authority. This shift is most visible in budgetary politics, specifically through the Plano Safra (the national funding package for agriculture). But reforms such as the binding budget amendments (*emendas impositivas*), which require the federal government to execute individual and caucus-led spending proposals, have strengthened the ability of legislators and the FPA to direct public funds to their constituencies, curbing executive discretion and enhancing legislative power.

Besides the FPA, the other key instrument for advancing the interests of agrarian capitalist classes within the state is the *Instituto Pensar Agro* (Think Agro Institute), founded in 2011. Styled as a "technical" think tank, Pensar Agro has evolved into a class-wide broker that produces policy proposals, supplies advisory staff to the FPA, and designs political and cultural campaigns (Pompeia 2021). It binds together a vast network of 48 agribusiness associations representing more than 1,000 companies and 69,000 farmers (De Olho nos Ruralistas 2022). The 2015 ban on corporate donations to election campaigns sharply increased the strategic value of these entities. As industry insiders have confirmed, once direct funding channels were closed, Pensar Agro and its affiliates became the principal filters through which agribusiness capital reached friendly candidates and parliamentary allies (personal interview, 9 January 2025; personal interview, 22 August 2025).

The central role of the Pensar Agro Institute illustrates how, despite internal differences among the various "faces" of agribusiness, Brazil's agrarian capitalist class fractions have demonstrated the capacity to act in unison to sustain and coordinate their political influence. The institute functions much like US-style lobby syndicates, mediating conflict and furnishing a collective doorway into government. It ensures that Brazil's agrarian capitalist class fractions can shape policy proactively while preserving their ability to bargain for particularistic advantages. Rather than engaging in fragmented lobbying within Congress, sectoral disputes are now settled behind closed doors, with pre-negotiated, "ready-made" bills – harmonized across subsectors – delivered directly to legislators (personal interview, 9 January 2025).

4. The fruits of agribusiness rentier strategies: land and money

How do the various "faces" of agribusiness represented in the FPA come together with the often-incoherent strands of authoritarian populism to make sure that agribusiness' collective access to the state produces the desired material advantages through public policy and institutions without exposing the differences? The answer lies primarily in the ability of agribusiness to make constant progress on the two basic shared economic goals that cut across internal divisions: access to more land and funding for large-scale agriculture. Taken individually, these two goals may follow their own logics, but they are ultimately intertwined. Unrestricted access to frontier land for instance is more important to large-scale agricultural producers than to multinational traders, responsible for most agricultural exports, while access to funding for infrastructure may be more important for multinational traders than large-scale agricultural producers. Still, at the end of the day, progress on one front has positive effects on the other, while both require the decisive intervention of the state and hence the deployment of rentier strategies.

For instance, state-brokered arrangements, such as land-tenure legislation, titling programmes, and resource-concession regimes, create channels through which agrarian capital consolidates control over land and/or increases territory. That expansion, in turn, increases the land under production and yields higher profits for capitalist producers and commodity exporters. Moreover, gains on land issues often translate into gains on funding issues, as the amount of funding negotiated by the FPA in Congress that is accessible to different sectors is proportional to the size of the enterprise. As we have seen in the section on the different faces of agribusiness, fissures however can emerge between different class fractions around the content of land or environmental laws if it is understood as having a negative impact on one's market image or share.

These mechanisms become particularly visible in the long-standing struggle over access to land. For decades, the major battle pitted large landowners and agribusiness against landless rural workers and family farmers, with the latter advocating the democratisation of access to land through its redistribution to landless families. In turn, the gradual but apparently definitive reduction of significant land distribution signals the victory of agribusiness in, as Stiglitz (2019) would have it, blocking the entry of its adversary into the land market. The practical implications of this dynamic are particularly clear when we examine the trajectory of farmland expansion in Brazil, which is, to a large extent, carried out by agribusiness, in comparison to the land distributed to agrarian reform beneficiaries. Between 2000 and 2020, the area of agricultural land grew by 50.1%, while grasslands and forest cover declined by approximately 9%, primarily in regions targeted by large-scale agribusiness (Belandi 2022). At the same time, agrarian reform efforts, while commendable during the first two Lula mandates, have always been dwarfed by the territorial expansion of the major agribusiness crops (see Figs. 3 and 4) (Vergara-Camus and Kay, 2017b)[3]. Soybean production, for instance, increased from 18.5 million hectares in 2002/3 to 47.3 million hectares in 2024/25 (CONAB, n.d). Given that this expansion is directly the result of state action or inaction, we could argue that the Brazilian state provides nature for agrarian capital, but we would add that it does so not out of structural necessity, but because of the concerted strategic efforts of agribusiness.

As described above, after access to an increased amount of land with as little restrictions as possible, access to funding for agricultural activities is the other major goal of agribusiness. This goal, although probably legitimate for any sector or collective actor, in the case of agribusiness is effectively achieved because of its disproportionate control of Congress at the expense of the general population, who indirectly pays for its expansion through fiscal and tributary mechanisms that redistribute public resources upward to agrarian capitalist classes. Historically, Brazilian agribusiness benefited from significant tax breaks, including through the Kandir Law, which exempted agricultural exports from state VAT (ICMS). Additionally, many agricultural inputs received zero-rate federal social contributions (PIS/COFINS), and agricultural income often enjoyed favourable income tax treatment, effectively acting as a tax shelter (Corcioli et al. 2022). One of the clearest examples is the *Plano Safra* (Harvest Plan), which annually directs large volumes of federal state subsidized credit, debt relief, and rural insurance to medium and large producers, primarily through public banks (Grinberg, 2013: 462-463). These subsidies have played a central role in accelerating the consolidation of large-scale agribusiness operations, which thanks to the efforts of the FPA in Congress have rarely diminished. In fact, they remained constant during the period of economic downturn of the late 2010s and even increased significantly during Bolsonaro's presidency. In contrast, smallholder and family farms receive significantly more restricted support through the *Programa Nacional de Fortalecimento da Agricultura Familiar* (National Programme for the Strengthening of Family Farming, PRONAF), whose limited budget and bureaucratic hurdles often constrain its reach and impact (see Fig. 5). As confirmed by interviews with civil society organizations

[3] Although the number of families settled through agrarian reform programmes rose again to 12,360 in 2024 under Lula's current mandate (Gov.br 2025), this figure remains far below the peaks reached during his earlier two administrations.

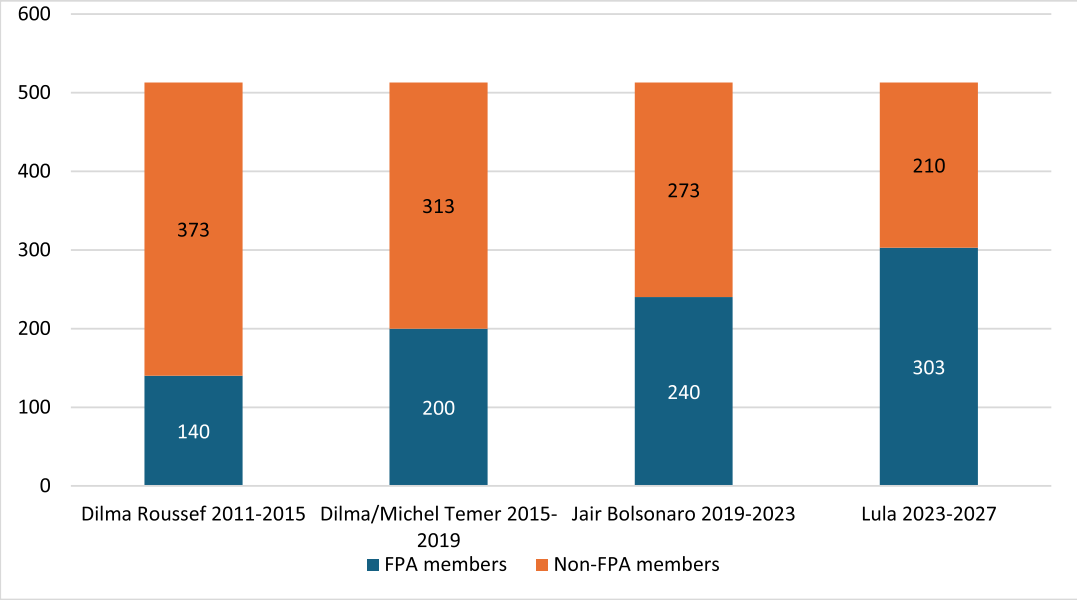


Fig. 1. Approximate Number of Parliamentary Agricultural Front Members in the Chamber of Deputies.
Source: Walendorff (2023), Repórter Brasil (2011), BrasilAgro (2022), Bragança (2014), and BBC News Brasil (2023). Data compiled by the authors.

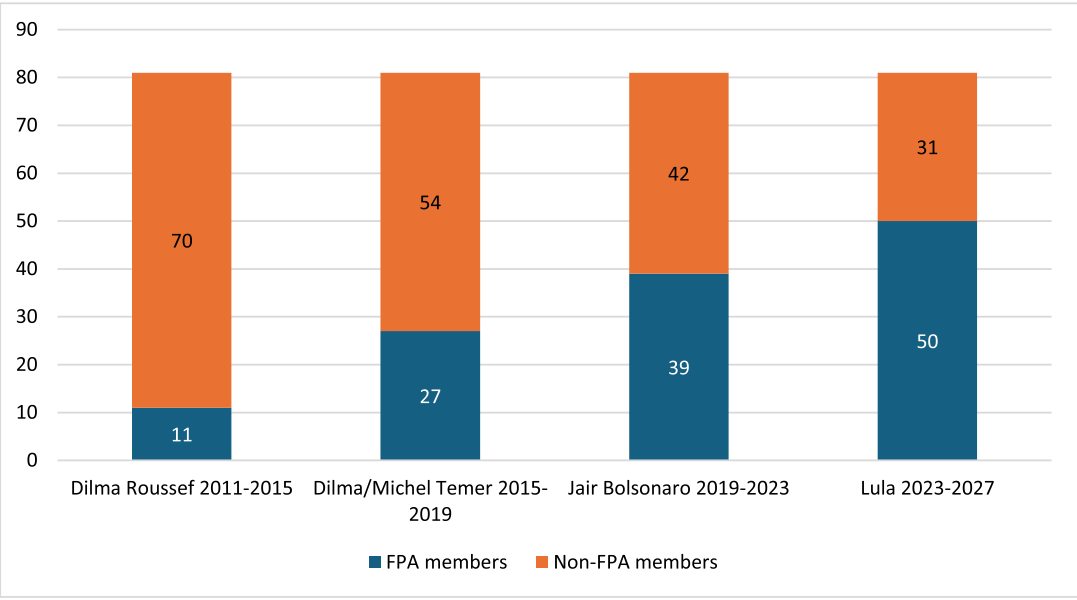


Fig. 2. Approximate Number of Parliamentary Agricultural Front Members in the Senate.
Source: Oliveira and Gabriel (2023), and BBC News Brasil (2023). Data compiled by the authors.

and industry insiders, although the current Lula administration has reinstated several key programmes discontinued under the Temer and Bolsonaro governments, it is doing so under the heightened influence of agribusiness (personal interview, 9 January 2025; personal interview, 22 August 2025; personal interview, 1 April 2025).

Of course, this dynamic extends into specific forms of rent extraction, for example through the widely studied processes of financialisation. Benefiting from its hegemonic position and privileged access to the state, yielding land and funding allowed agribusiness to instil confidence among other actors, which creates the conditions for land and agriculture to be further transformed into financial assets. This opened another rentier opportunity for agribusiness, which can now extract financial revenues directly from other economic sectors. Indeed, since the 2008 global economic crisis, pension funds, investment firms, and hedge funds have increasingly viewed farmland and agro-infrastructure as "alternative assets" – relatively stable, tangible investments in an era of heightened market volatility (Santos et al. 2022).

4.1. *Recent rentier strategies under Bolsonaro and Lula's Third Mandate*

As part of an attempt to imprint agribusiness hegemony with a more radicalized agenda, Bolsonaro's presidency pivoted rentier strategies of agribusiness around access to land toward the reshaping of constitutional land rights and the lifting of environmental regulations.

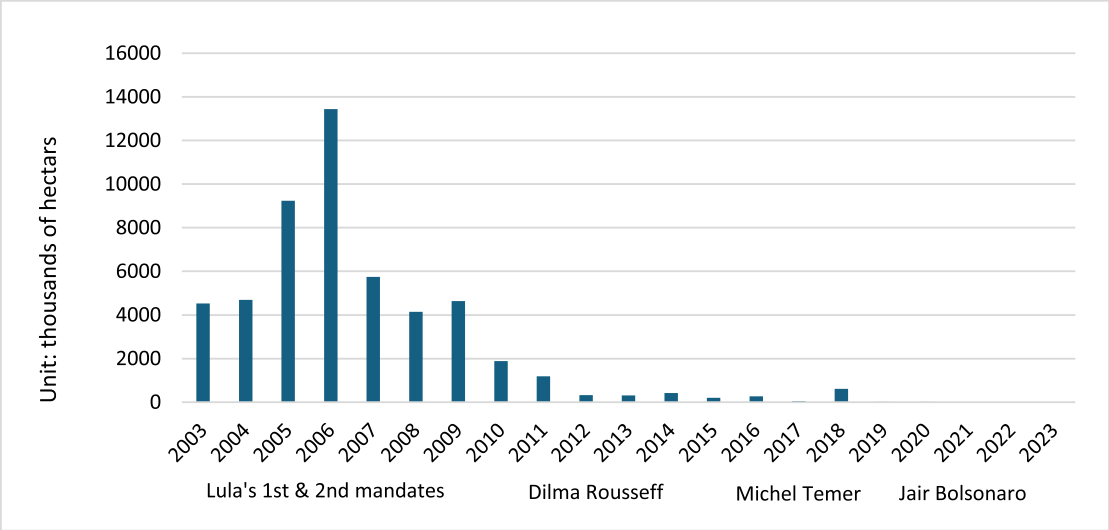


Fig. 3. Annual land area acquired for agrarian reform (2003-2023).
Source: National Institute for Colonization and Agrarian Reform, 2023.

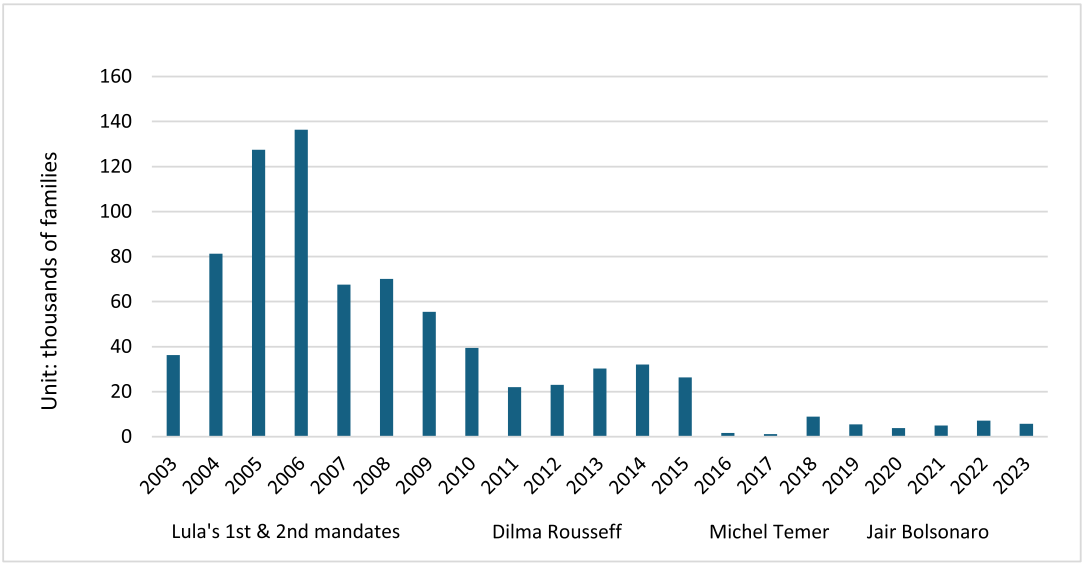


Fig. 4. Annual number of families settled through agrarian reform in Brazil (2003-2023).
Source: National Institute for Colonization and Agrarian Reform, 2023.

Concretely, this attempt at maintaining its territorial expansion operates through three main paths: legislative measures to privatize public land, reforms to land and environmental governance, and turning a legal doctrine that restricts Indigenous land rights into law.

Since returning to power in 2023, though, Lula's government has sought to distance itself from the explicitly deregulatory and expansionist land agenda of the Bolsonaro years by restoring the political authority of the Ministry of the Environment under Marina Silva and resuming Indigenous land demarcation processes through the newly created Ministry of Indigenous Peoples under Sônia Guajajara. However, these changes have remained partial and constrained by the continued institutional strength of agribusiness in Congress, resulting in an ongoing struggle in which the government has attempted to slow these legislative initiatives while the FPA continues to push for their implementation.

The first path to securing territorial expansion involves legislative initiatives to transfer federal public lands into private ownership, pushed forward by the FPA since 2019. The flagship measure, Bill 2633/2020, coined by environmental movements as the "Land-Grabbing Bill", seeks to regularize large-scale illegal occupations of federal public land by streamlining land titling procedures. It applies to rural areas, including lands under INCRA's jurisdiction and those earmarked for agrarian reform, Indigenous, and quilombola communities. The bill allows claims based on self-declared occupation records and reduces requirements for in-person inspections (Barbiéri 2021). Approved with 296 votes in favour by the Chamber of Deputies in 2021 during Bolsonaro's presidency, it is currently awaiting review in the Senate.

The second path concerns reforms to land and environmental governance, aimed at institutionalizing deregulation and simplifying legal mechanisms that facilitate territorial expansion. The 2012 reform of Brazil's Forest Code marked a critical turning point. Championed by the FPA and supported by major agribusiness associations, it granted

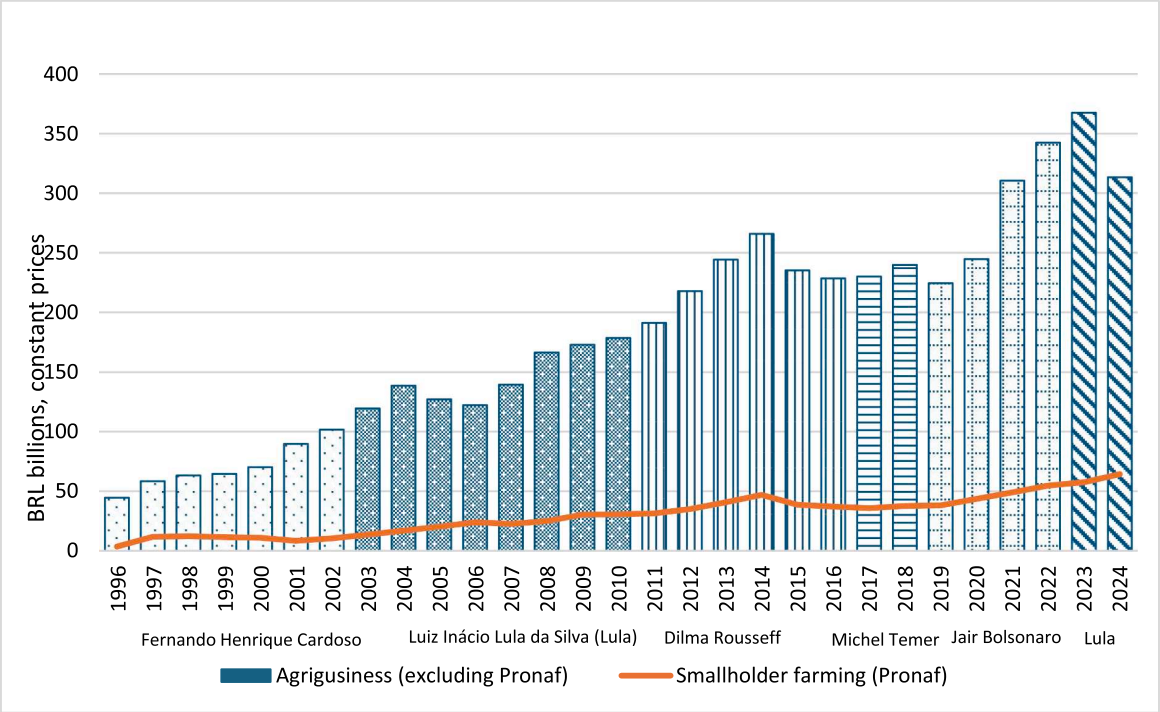


Fig. 5. Recent agricultural funding in Brazil: agribusiness and smallholder farming.
Source: Central Bank of Brazil. Data compiled by the authors.

amnesty for illegal deforestation prior to 2008 and relaxed legal obligations for environmental preservation on private rural lands (Falcão and Guimarães 2011). This deregulatory process deepened under Bolsonaro, as the agribusiness bloc sought to weaken enforcement institutions like IBAMA and FUNAI and to expand agricultural frontiers in environmentally sensitive areas. Current legislative efforts continue this trajectory through the proposed *Lei Geral do Licenciamento Ambiental* (General Environmental Licensing Law), which seeks to simplify environmental licensing procedures and reduce oversight for rural properties and infrastructure projects, thereby facilitating agricultural expansion even in areas with environmental or Indigenous protections. The proposal allows for self-declaration, decentralises criteria and procedures to state and municipal levels, lifts the special protection regime of the Atlantic Forest, and restricts the obligation to consult Indigenous and Quilombola peoples (Teixeira and Calil 2025). A significant development occurred in 2023 and 2024, when the Senate, with strong backing from the FPA, approved revised versions of the bill that further streamlined environmental licensing procedures for infrastructure and agricultural projects deemed of "strategic interest." However, the proposal still awaits final legislative approval (Teixeira and Calil 2025).

Finally, the third and most important path to guaranteeing territorial expansion is probably the one where the FPA has gone to the greatest length. Indeed the FPA revived and intensified support for the marco temporal thesis, a legal argument limiting recognition of Indigenous territories to lands occupied or legally claimed up to 5 October 1988, the date of Brazil's current Constitution. Any proof of occupation or land claims made by Indigenous Peoples after that date would be inadmissible. The thesis, which had circulated since the 2000s, gained unprecedented traction during the Bolsonaro years, when Senator Tereza Cristina – former Minister of Agriculture under Bolsonaro and current FPA leader in Congress – emerged as a central figure. Cristina sponsored Bill 490/2007, backed by the FPA and Bolsonaro-aligned legislators, aiming to enshrine the thesis into law (Vivas 2023). The bill advanced rapidly and was approved by both the Chamber of Deputies and the Senate in September 2023. However, this legislative victory was short-lived. In that same month the Supreme Federal Court of Brazil (STF) issued a ruling that deemed the law unconstitutional and President Lula vetoed its central claim and several key provisions, while always being careful never to confront agribusiness publicly. The Congress overrode the veto to enact the law in October 2023 (Vivas 2023) and, in order to secure it, introduced a project to amend the constitution (PEC-48/2023) that sets 5 October 1988 as the date that Indigenous People have to prove land occupation. This sent the issue back to the STF. In April 2025, STF judge Gilmar Mendes suspended all actions on the matter until the tribunal reached a final decision and created a working group with the executive and the legislative powers. But in a rarely seen gesture, on 9 December 2025, marking its resolve to see the matter settled regardless of the STF, the Senate voted twice on the same day in favour of the constitutional amendment and sent it back to the lower house (Agencia do Senado). 50 out of the 52 Senators who passed the constitutional amendment were affiliated with the FPA, showing that agribusiness put all its weight in the balance and went to extraordinary measures to be able to limit indigenous demarcation and open more land to its activities. However, only 9 days after the vote of the Senate on 18 December 2025, the STF rendered its decision on the constitutionality of the 2023 law. Eight judges ruled against the law and two in favour. This decision sent the ball back to Congress, which needs to review the matter. The STF on its part will still have to assess the constitutionality of the constitutional amendment on the basis of the question of whether the Indigenous right to land should be considered immutable or not, leaving the final resolution of this issue still uncertain.

Together, these legislative efforts exemplify agribusiness's systematic and largely successful strategy to shape legal and political conditions that facilitate ever-greater access to land. However, although the ever-growing influence of agribusiness is having important consequences, the battles around policies and legislation also show that the state remains a contested arena. This is nowhere more evident than in the ongoing disputes between the FPA, the Lula administration and the judiciary around the *marco temporal*, where agribusiness uses all its power to transform an historic demand into law and pushes legislators to

challenge the accepted checks and balances of the political system.

5. Conclusion

In this article, we have proposed an original theorisation of the state that brings Bob Jessop's strategic-relational approach to bear on the discussion about the nature of the relationships among actors within a capitalist state and the structure of the economic market under advanced neoliberalism. We argued that rentier state theorists correctly highlight the preponderance of rent-seeking behaviours within a natural resource-dependent society, but they mistakenly limit rent-seeking to politicians. By drawing inspiration from Marx's category of ground-rent, as well as a broader conceptualisation of rent that understands it as an advantage of monopoly power, we highlight the importance of access to the state for economic actors who seek to gain control of nature and monetary revenues. We argue that the state should be understood as a space of accumulation of wealth in which actors deploy rentier strategies to extract rent, financial resources or favourable policies from the state. To do so, they develop discourse that seeks to become hegemonic, build alliances with other social forces, but also develop concrete political strategies of occupying and controlling the state. To exemplify our theoretical argument, we examined the relationship between agribusiness and the rise (and fall) of Jair Bolsonaro to demonstrate that the decision of agribusiness representatives not to support Bolsonaro's coup attempt of January 2023 can be explained by their pragmatism and opportunism, which they can afford given their effective control of substantial parts of the state, notably the legislative branch.

The trajectory of Brazil's agrarian capitalist classes over the past two decades reveals a dynamic and adaptive hegemonic project rooted in the dual long-term political objective of presenting its sustained growth as synonymous with Brazil's prosperity and occupying the institutions of the state to be able to deploy and benefit from rentier strategies of accumulation. Despite their internal heterogeneity and the multiplicity of 'faces' through which they express themselves, these class fractions have increasingly converged around two common goals: access to land and continued funding. This convergence has not flattened their diversity but has been the ground for a flexible coalition capable of navigating shifting political circumstances. The political expression of these interests has nevertheless changed considerably through time. During the early 2000s, agribusiness adopted a largely pragmatic approach towards the PT governments, using its economic weight to secure access to finance and land while simultaneously shaping the ideological and institutional environment in which these interests were pursued. The impeachment of Dilma Rousseff in 2016 marked an important turning point. It opened greater political space for the radicalization of agribusiness demands, particularly as authoritarian populism gained ground and far right factions within the sector became increasingly influential. Under Bolsonaro, these factions sought to give the sector's political project a more explicitly conservative and anti left character, while agribusiness as a whole continued its longer term strategy of institutional influence through the Frente Parlamentar Agropecuária (FPA). This combination of material continuity and ideological radicalization helps explain why the sector could accommodate the far right without being reducible to it. The return of Lula to the presidency in 2023 has once again altered the political environment in which these interests are pursued. Agribusiness has faced important setbacks, including decisions by the STF, but its response has generally been characterized by tactical recalibration rather than wholesale confrontation. This resilience reflects the sector's deep institutional embeddedness and its ability to separate its enduring material objectives from the political formations through which it pursues them. Its capacity to operate across changing political configurations allows agribusiness to preserve access to resources and institutions while adapting its strategies to new circumstances and positioning itself for future electoral campaigns, legislative negotiations, and regulatory disputes.

To deepen our understanding of this evolving relationship between agrarian capitalist classes and the Brazilian state, other studies could examine how different 'faces' of agribusiness benefit from state access in distinct ways or how the political ascent of more radicalized expressions of agribusiness – alongside their ongoing negotiation with incumbent powers – has shaped the expansion of different fractions' bases of accumulation. These patterns reflect divergent cultural, political and economic strategies that must be analyzed to grasp the full complexity of agribusiness's role in shaping Brazil's political economy and its contested future.

CRediT authorship contribution statement

Leandro Vergara-Camus: Writing – review & editing, Writing – original draft, Methodology, Investigation, Formal analysis, Conceptualization. **Tomaz Mefano Fares:** Writing – review & editing, Writing – original draft, Methodology, Investigation, Formal analysis, Data curation, Conceptualization.

Declaration of competing interest

None.

Acknowledgments

We are grateful to Valdemar João Wesz Junior for his thoughtful comments and valuable insights, which enriched the development of this article, as well as to the two editors, Fernando Leiva and Thomas Chiasson-LeBel, for their valuable comments and suggestions on how to improve the argument.

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