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## Soy King and Wheat Queen

**The meaning of leading monocultures in agrarian change  
in Brazil and Russia**

**Paulo Niederle, Alexander Kurakin, Alexander Nikulin, Sergio Schneider**

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# Soy King and Wheat Queen: The meaning of leading monocultures in agrarian change in Brazil and Russia

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## **Abstract**

The Food Regime approach was projected as a historical method of “incorporated comparison” (McMichael, 1990). Nevertheless, this comparison of the role of agriculture in the world-system has led several scholars to overemphasize an excessively unitary and coherent global food regime. While recognizing this approach offers historical-comparative analytical tools to understand global trends, this paper suggests that Russian and Brazilian agrarian development put under question some statements of the food regime approach. The contemporary insertion of both countries in the global markets, suggests some divergences in their positioning in the food regime genealogy. In order to do this, the paper focuses on the production and export of soy and wheat. Although these commodities are not representatives of the entire agrarian economy of Brazil and Russia, it allows us to compare some of the most important strategies they have developed not only for international trade, but also in terms of domestic markets. Firstly, we briefly discuss the historical routes Russia and Brazil have taken concerning the agricultural development and their insertion in global food markets. After that, we analyze the radical changes that followed the Russian perestroika and the Brazilian re-democratization processes in the end of the 1980s, and, in both cases, the consolidation of neoliberal policies in the 1990s. In the subsequent section, we focus on the turn both countries have experienced in direction to a ‘neo-developmental State’, which maintained the export-oriented policies for the agribusiness, but tried to conciliate it with domestic food security and sovereignty policies. Finally, we conclude that, while Russia and Brazil have followed different trajectories over the time, in recent decades there have been important convergences in terms of State strategies to boost a commodity export-oriented economic growth model by supporting large domestic and foreign corporations. However, those commonalities do not allow us to define a neoliberal food regime. On the contrary, it suggests that the contemporary period could be better defined as the moment of paradigmatic crisis in which two or more food regimes coexist.

## **Keywords**

Food regime, Agriculture, Russia, Brazil, Commodities.

## 1. Introduction

Since the end of the nineteenth century, Russian and Brazilian agricultures have witnessed substantial reconfigurations. For several decades, these processes resulted from the State intent to make agriculture subsidiary of an economic growth strategy that focused on industrialization, urbanization, and modernization. This project has influenced profoundly peasant practices, communities' organization, and all rural landscape in both countries. However, apparently the main historical convergences stopped there. Over time, the trajectories of these countries have become quite singular. Russia experienced seven decades of the 'soviet model', which implied two moments of abrupt reorganization of rural areas concerning the processes of land collectivization (1929-1931) and de-collectivization (1992), whereas Brazil has never promoted any massive agrarian reform. In Brazil, this project was blocked by a military coup d'état that, from 1964 to 1984, pushed this country to a compulsory agricultural modernization, which reproduced the American agrarian capitalist model.

In the sociology of agriculture, the 'food regime' analysis has been one of the most prominent frameworks used to discuss 'the role of agriculture in the development of the capitalist world economy, and in the trajectory of the state system' (Friedman and McMichael 1989:93). This framework has spread worldwide because of its unusual capacity to interpret the long-term history of the agri-food sector, connecting it to the major changes of the world-system, which today conjugates processes such as transnationalisation, supermarket revolution, financialization, and land grabbing (Friedmann 2016; McMichael 2016; Borras et al. 2016; Otero 2012). Although the fact that this framework has become very heterogeneous, being sometimes confused with a wide platform for the renewal of agrarian critical studies, in the core of the analysis still is the French regulationist binomial structure: 'modes of regulation' and 'regimes of accumulation'. It was by means of these concepts that food regime analysis have distinguished three periods of relative stability of capital accumulation processes and inter-state division of political power: Imperial-Colonial (1870-1920); Mercantile-Industrial (1940-1970), and Neoliberal-Corporative (1980 onwards).

In this paper, we are not primarily interested in reconstitute these periods in the same way food regime analysis proposes, even because the trajectories of Brazil and Russia countries do not necessarily follow this chronology.

Nevertheless, we are neither interested in, exploring the differences, retaken some criticism that have already confront the big narrative encompassed by the idea of a singular global food regime (Niederle 2017; Wilkinson and Goodman 2017). In another way, we are specifically concerned in understand whether Brazilian and Russian recent strategies to take part in global food markets follow a more general movement of the global capitalism. Our contribution to this discussion lies on the most controversial issue in the food regime analysis, which is the idea that, from the end of the 1980s onwards, we have seen the consolidation of a 'neoliberal food regime' controlled by the corporate capital.

We do this exploring the convergences that Brazil and Russia have experienced in terms of agricultural development from the 1990s onwards, which are mainly based on policies for export-oriented commodity production. For that, our focus is on the production and export of soy and wheat. Although these commodities are not representatives of the entire agrarian economy of these countries, it allows us to compare some of the most important strategies they have developed not only for international trade, but also in terms of domestic markets. Firstly, we briefly discuss the historical routes Russia and Brazil have taken concerning the agricultural development and their insertion in global food markets. After that, we analyze the radical changes that followed the Russian perestroika and the Brazilian re-democratization processes in the end of the 1980s, and, in both cases, the consolidation of neoliberal policies in the 1990s. In the subsequent section, we focus on the turn both countries have experienced in direction to a 'neo-developmental State', which maintained the export-oriented policies for the agribusiness, but tried (not always successfully) to conciliate it with domestic food security and sovereignty policies.

Finally, in the conclusions, we suggest that, while Russia and Brazil have followed different trajectories over the time, in recent decades there have been important convergences in terms of State strategies to boost a commodity export-oriented economic growth model by supporting large domestic and foreign corporations. It means that, even though it represents a regime increasingly controlled by corporate capital, both countries have created modes of regulation, which are very hard to interpret as neoliberal. Because of that, considering Brazil and Russia, we suggest that it would be better to define the contemporary period as a moment of paradigmatic crisis in which no other regime is clearly shaped, or, as examples of a more plural world-system, where two or more regimes could coexist.

## **2. 2. Agriculture and agrarian change in Brazil and Russia (1880 – 1980)**

While wheat has been a component of (agri)cultural history for many centuries in Russia, soy became an important crop in Brazil only in the 1960s. It was when this grain was introduced as an alternative of agricultural diversification in areas of wheat, cotton and coffee cropping. Such differences could lead us to draw our attention to the singular histories of these crops in each country. Nevertheless, this section highlights some commonalities between them, trying to analyze how wheat and soy have become the icons of Russian and Brazilian agriculture.

Historically, Russian agriculture rested on a feudal system where land and serf peasants belonged to nobility (aristocracy). The latter provided land for peasants and in return received payments (initially in products) and/or labor services on landlords' farms. The serfdom period formally ended in 1861 with the reforms of the emperor Alexander II. Nonetheless, Russia still stayed a peasant society with more than 90% of peasants in the total population. Therefore, peasantry constituted the backbone of Russian agriculture, although aristocratic landownership remained quite substantial even at the beginning of the 20th century. Here we have to remark that Russian peasants did not have land in their private property after the abolition of serfdom. Instead, the land was in a collective property of rural communities, which periodically redistributed it among all members (families) according to their needs and/or labor capacity.

In terms of food production, traditionally, rye was the vital grain for Russian peasantry because 'black bread' was the cornerstone of peasants' nutrition and survival. This product is still popular in Russia and massively produced. At the beginning of the 20th century, wheat production was almost twice less than rye, and oat was more popular than wheat as well. However, wheat, along with barley, became the most important export commodity of Russia throughout the 19th century, whereas other grain such as rye and oats (used for forage) dominated the production for domestic consumption. Before the World War I, Russian southern regions produced around 70% of all national wheat, while rye was the major grain crop for central regions (Ostrovsky 2013). It was only in the 20th century that wheat definitely replaced rye as the main grain crop.

If we focus on the Russian role in global markets of agricultural commodities, its participation started in the 18th century, but, at the beginning of the 19th century, grains still constituted less than 10% of the total exports of the country. At that

moment, Russian exports included traditional raw and semi-finished products such as wood, flax, hemp, and fur as well as sailing cloth and iron. It was only during the last three decades of the 19th century that the share of grain export reached half of the total Russian exports. Wheat and barley became the leading export crops, each one constituting 1/3 of the total grain exported at the beginning of the 20th century (Ostrovsky 2013).

The global food market made wheat the Russian export 'queen', even though the position of Russia in the global economy were contradictory and unstable, thanks to different reasons. First, the traditional peasant agriculture was obsolete and presented very low productivity. Second, State policies extracted resources from agriculture for the needs of industrialization. Third, in the global economy, Russia itself became an agricultural appendage, exporting raw products and importing high value added products from industrialized capitalist countries. Peasants were losers in that twofold unfavorable exchange, i.e. 1) between agrarian Russia and industrialized West, and 2) between industrial and agrarian sectors in Russia. The rise of grain export was accompanied by peasant impoverishment, economic differentiation and rural overpopulation that caused social crisis in rural Russia. Along with many other factors, including the participation in WWI, those trends resulted in the series of rebellions and revolutions of 1905-1917 and in the civil war.

When these conflicts ended, the problem of industrialization came back to the agenda, but now for Soviet government. The oncoming new global war forced the soviet government to speed up industrialization. Stalin solved the problem following the same strategy previously used by the Russian monarchy, i.e. by increasing grain export and nonequivalent exchange between rural and urban areas. At the same time, collectivization campaign became the instrument for industrialization by means of noneconomic extraction of resources from peasantry. Because of that, wheat became once again the major export crop.

In the postwar Soviet Union, wheat lost its importance as export crop. The Soviet government created policies that dramatically changed the agricultural systems, most of those supporting the expansion of mechanized large state and collective farms, which were further enlarging every decade. This process was essential in order to respond the project of an industrialized and urbanized Soviet society. It means that, to some extent, the Soviet government' imagined future for socialist agriculture and society was not so different from the American capitalist model. Despite the different economic models, both of them followed the idea of a modern industrialized society. As a result, wheat was used for domestic

consumption and forage for developing animal breeding. Unlike Imperial Russia, Soviet agriculture produced substantial volumes of meat and milk, although with low economic efficiency.

Because of the modernization policies, the peasants that were the most important group of food producers in the Imperial Russia disappeared as a class in the soviet agriculture. Small producers survived, but changed their nature. Along with large state and collective farms, the peasant practices have survived inside small household plots, which are still responsible for substantial share of Soviet food, such as vegetables, fruits, and milk. These households have combined the labor on collective farms and on their own plots. Besides, they have used some resources of the large farms for their own family production, establishing a type of symbiotic relations between large and small agricultural producers (Nikulin 1999). Households have never been engaged in grain production, which became a domain of large farms.

In spite of the efforts to modernize these large farms, the results did not achieve the previously established goals, and the grain shortage became the huge headache for Soviet government. The virgin land campaign by Khrushchev aimed to solve the problem but eventually failed. Agriculture received massive investments and subsidies but did not develop enough. Thus, in the 1960s the Soviet Union started to import grain and did it until its own collapse (Nikonov 1995).

Introduced by European immigrants at the end of the 19th century, in Brazil wheat production was always driven to domestic consumption. In that moment, Brazilian export agriculture was dominated by coffee, which represented 63% of all Brazilian exports in terms of value in 1890. Even though domestic agriculture was much more diversified - bean and maize being even more significant than coffee in terms of area - the historical strategy of economic growth by means of commodity exports made coffee the most important and long-lived king of the Brazilian agriculture and economy, succeeding sugarcane, cotton, rubber and forest. Nevertheless, its reign started to collapse with the global crisis that followed the 1929's New York stock markets crash, which revealed the fragility not only of the Brazilian economy, but also of all economies that were widely depended of the international demand for agricultural commodities.

The global crisis accentuated the economic and social inequalities, amplified the hunger problem, which had already been defying political stability since the end of the 19th century, and created the 'opportunity window' for the ascension of a new political coalition. Led by Getúlio Vargas, this coalition took control of the

Brazilian government for fifteen years (1930-1945), period during which Brazil made his first effort of 'import substitution industrialization', internalizing the industry of inputs and capital goods. However, at that moment, this strategy was partially blocked by the global economic retraction; which forced the government to strength the internal market, mainly by policies to expand the new industrial and urban consumption. During this period, while soy was still a marginal and experimental crop, coffee remained the most important export commodity. In turn, wheat became one of the most important economic and social problems.

The concurrence with the Argentinean wheat has historically been a factor of instability for Brazilian economy.<sup>1</sup> All over the first half of the 20th century, this dependency contributed to aggravate food supply crisis. In 1930, in order to solve that problem, Getúlio Vargas started to incentive the creation of cooperatives of wheat production. While the results have never accomplished the initial expectations, from 1960 onwards these cooperatives have become central actors in the dissemination of the soy production, which was incorporated as an alternative of diversification that answered two main objectives. On the one hand, soy becomes the option for crop rotation that the government 'offered' for wheat producers in order to increase their weak economic gains and keep them in the activity, and, at the same time, as an option of crop substitution for coffee producers that had never really completely recovered his gains since the global crisis. On the other hand, with the acceleration of the global economy in the post-war period, soy export would become the new source of capital to finance a new wave of industrialization.

After some attempts of developmental governments, in the end of the 1950s and beginning of the 1960s, to implement structural reforms in Brazilian economy, including a program of agrarian reform and privileging domestic market, in 1964 a civil-military coup d'état redefined the economic strategy. In order to 'ward off the risk of the communism', the military dictatorship (1964-1984) intensified a very unequal and authoritarian strategy of economic growth, centralizing resources in the hands the national oligarchies whose investments were beneficiated by the public credit (borrowed for the State from North American banks). In agriculture, this strategy embraced policies that privileged the largest farms of the southern region, where soy started to succeed coffee in the agricultural throne. The ascension of the new king was catalyzed by the highly

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<sup>1</sup> Argentine is beneficiated for a climate condition more propitious for wheat production. In Brazil, even if concentrate in the most meridional region, this crop frequently faces problems because of the wide variation of temperature and rain in winters, which has historically discouraged farmers to cultivate it.

subsidized public financing program granted by the National System of Agricultural Credit, created in 1965. Besides, closely articulated to the credit, the military government also shaped programs of price subsidies (PGPM, 1966) and risk assurance (PROAGRO, 1973), as well as the Public Corporation of Agricultural Research (Embrapa, 1973) to adapt modern technologies, and the Public Corporation of Rural Extension Services (Embrater, 1974) to disseminate it.

Along with the whole economic strategy, these policies started to disintegrate in the seventies, following the international oil price shocks and debt crisis. The breakdown was not instantaneous, and the agriculture continued to receive strong support, only because the government - pressed by the agrarian elite and by its own interest in political self-reproduction - decided to artificially sustain food prices and credit support. The consequence was a serious indebtedness of the Brazilian State, which, in the middle of the 1980s had already completely lost capacity to regulate economy, promote economic growth, and control the expansion of social conflicts. Because of that, a neoliberal narrative emerged sustaining that the State was the main responsible for the crisis. The strengthening of this idea led to abrupt adjustments in public policies, mainly transferring responsibilities to the private sector. In the case of agriculture, banks, agricultural corporations and supermarkets started to take in their hands the systems of credit, research, technical assistance, food supply, and price regulation, opening a new moment for the Brazilian agriculture, with deep effects to the soy economy that we will analyze in the next section.

### **3. Agricultural reforms in the Post-soviet Russian and Neoliberal Brazilian States (1980 – 2000)**

After the demise of the Soviet Union, Russian agriculture passed through the radical market reforms of 1992-1995, which included privatization of the land and assets of kolkhozes and sovkhozes (collective and State farms). The majority of collective and state farms were transformed in private enterprises with various organizational forms, such as production cooperatives, limited liability companies, and joint-stock companies (Wegren 2009; Uzun, Shagaida 2015). However, especially at the beginning of the post-Soviet period, the conversion of the collective and State farms into these new organizational forms quite often represented nothing but the change of the nameplate, keeping the same actors and activities.

The shock therapy of liberal market reforms caused a huge downfall in agricultural production, in which large farms were the major victims. Therefore, it was no surprise that the reforms negatively affected grain production as it was allocated in large farm enterprises (LFEs). The effects were so remarkable that, until now, some indicators of agricultural production have not yet recovered to the same level of the soviet period. Besides, it also corroded the welfare state previously assured by the Soviet government (Kurakin 2015). Suddenly, people found themselves in a completely new system, in which they should become responsible for their own life conditions, including food supply. Because of that, contrasting to downfall of agricultural production in LFEs, households increased food production by intensifying their labor (Pallot, Nefedova 2007). It was not only a way to maintain traditional food diets and practices, but, above all, a need imposed by the economic and social crisis that followed the definitive entrance of Russia in the capitalist regime. Anyhow, while in this period households have produced over half of the total agricultural GDP in Russia they have never affected wheat production, as they have never been engaged in this sector.

In the 1990s, president Yeltsin's de-collectivization reforms created a third actor - private individual/family farmers - who joined the Soviet bi-modal agrarian structure (collective farms and household plots). The foundation of a large group of family farmers was one of the primary goals of the liberal agrarian reforms. Even though the first results were rather modest, as family farmers were almost invisible in the newly emerging structure of the post-soviet Russian agriculture, over the recent years this group has demonstrated increasing importance, being today responsible for almost 15% of the agricultural GDP. For instance, Wegren (2011) argues that the possibilities for further growth of family farmers still exist and that they have promising perspectives. Moreover, unlike the household plots, these family farmers are occupying the same sectors in which LFEs operate, including wheat production.

Besides the difficulties to increase grain production during the 1990s, Russia also faced a crisis of the livestock production, which forced the country to increase meat import from other countries, including Brazil. The combination of raised food prices with deep economic crisis that restricted salaries and consumption, made households to keep livestock production as an important activity. In many villages, chicken and pig farming became a crucial strategy for food security during the 1990s.

Similar to the Russian case, in Brazil, the second half of the 1980s was defined by deep adjustments in the State action. Initially, the re-democratization process

led social movements, political parties and intellectuals to invest their efforts on the construction of a new generation of decentralized and participatory policies. Nevertheless, the financial crisis of the State, associated with the absence of the institutional structures required to shape new models of government - after two decades of a very centralized dictatorship - made difficult to find feasible alternatives for national development. Overcome the crisis required two unavailable things: money and institutions to boost up a new cycle of economic growth. The post-military government tried to work around this problem by means of several economic plans, but all of them became ineffective and, in some cases, made the crisis even worse. For instance, while annual inflation accelerated from 224 % in 1985 to 1,232 % in 1989, and 4,116% in 1990, the employment and the FDI rapidly decreased. At the same time, institutional instability was aggravated by political disputes concerning the construction of a new Federal Constitution.

Finally approved in 1988, three years after the end of the military government, the new constitution sought to decentralize policies, giving greater autonomy to provinces and municipalities; recognize rights and increase social benefits for workers; expand restrictions on the entrance of foreign capital; and provide more space for state corporations (Sallum Jr. 2003). However, the exasperation of the crisis and the reactions of the conservative elite blocked the implementation of the constitutional directives, and started to design a paradigm shift in direction to neoliberal policies. In 1989, a representative of this group, Fernando Collor de Mello, defeated the left-wing candidate, Lula da Silva, in the presidential election, and, with support of the World Bank and the IMF, began to promote reforms following the Washington Consensus. The reforms included privatization and extinction of companies and public agencies and creation of the institutional conditions to attract international capital and recover the balance of payments, which implied trade liberalization, deregulation and raising interest rates (Niederle and Grisa 2018).

These reforms were accelerated in the subsequent years. However, a situation of economic and political stability was not achieved until mid-1990s, when the implementation of the Real Plan assured the election of the minister Fernando Henrique Cardoso (FHC) for two terms as Brazilian President (1995/1998 and 1999-2002). FHC defined his “historical task” as “to eliminate a piece of our past that still clutters the present and slows the advancement of society”, which was “the legacy of the Vargas era, with his autarchic development model and its interventionist state” (Bastos, 2012: 780). Focusing on monetary stabilization and market liberalization, the Real Plan focused on appreciation of the currency

(Real) to control the inflation, reduction of customs tariffs, end of restrictions on FDI, and a broad privatization program to reduce the public debt. The positive result was the reduction of the inflation, which fell from 631% per year at the beginning of 1995 to 9.56% at the end of 1996. However, this was only a relative control, since the prices remained quite unstable. Besides that, it was only possible due to the increase of the basic interest rate (60% per year in 1995), producing economic stagnation and unemployment (Sallum Jr and Goulart 2016).

Trade liberalization also put in danger the domestic industrial and agricultural production, which had to compete with cheaper imported products. The result was a crisis in the trade balance, which became negative in 1995 and worsened in the following years. Concerning the agricultural sector, while commodities export face problems because of the artificial appreciation of the Brazilian currency, domestic agriculture faced the competition of imported products, mainly those originated from Mercosur region (milk, wheat, meat, wine, among others). Then, because of the political pressure of the agrarian elites, government was obliged to create some sectoral policies compensating commodity exporters' economic losses. One of the most controversial until now is the tax benefit (Kandir Law) for export of commodities such as minerals, oil and soybeans (Delgado, 2012).

Despite soy production expanded during this period of transition from the military to the neoliberal governments, at that moment it was impossible to image what this crop would become in the subsequent years. From 1985 to 1995, the cultivated area of soy increased only from 9.44 to 9.48 millions of hectares, while the production augmented from 16.7 to 21.6 millions of tons. Nonetheless, if we take a look on other products, such as cotton, maize, beans and rice during this period, we would see that most of them lost area and/or production - the only exception is sugarcane whose area and production remained relatively stable (Niederle and Wesz Junior 2018). Actually, as we will see in the next section, the real expansion of the soy production happened from the beginning of the 2000s forward, but catalyzed by political choices in terms of economic development strategy that started to change in the end of the 1990s.

The Asian economic crisis of 1997 and, one year later, the Russian crisis, provoked an abrupt fall in the prices of the main commodities exported by Brazil and, at the same time, a reduction of the FDI and dollars availability abroad. Associated to the artificial appreciation of the Brazilian currency, these factors generated an unsustainable economic situation. The stroke of mercy in this model happened in 1999, when a huge foreign exchange crisis forced the

government to promote a quick devaluation of the Real. In that moment, the strategy shift to privilege an export-oriented economy, where agribusiness would become responsible for sustaining the balance of payment. Indeed, the exports of primary products began to react, changing the trade balance from a deficit of US\$ 11.6 billion in 1995 to a surplus of US\$ 7.2 billion in 2002. Because of that, and despite the fact that it was insufficient to solve the economic crisis, to assure the continuity of the same political coalition in the control of the State, and to refrain the increasing criticisms to the neoliberal paradigm, this commercial “success” allowed agribusiness to build its image of most dynamic Brazilian economic sector (Niederle and Grisa 2018).

On the other side, reacting the escalating violence in countryside related to land property concentration, the rising of social problems in rural areas such as unemployment and immigration, as well as the increasing political power of social movements and unions, in 1995 government also created the first national program of credit for family farmers (PRONAF). The main justifications to support this sector were and still are related to its contribution to reduce food prices in domestic markets, keep people employed in rural areas and reduce social conflicts. Accordingly, at the same time, the export-oriented agribusiness consolidated its economic and political hegemony in Brazil; family farming also established itself as a new and important coalition, which started to face the political narrative supported by the large farms’ trade unions about an imaginary vocation of an agriculture aimed at primary export markets. Finally, the new dualism in Brazilian agrarian policies was institutionalized in 1999, when government created the Ministry of Agrarian Development (MDA), which became specifically responsible for the policies for family farming, acting in parallel to (and, sometimes, in different direction of) the Ministry of Agriculture, Livestock and Supply (MAPA), whose policies privileged the export-oriented agriculture.

#### **4. Agrarian change in contemporary Russia and Brazil (2000 onwards)**

In the 1990s, the most attractive lands of the southern Russia became targets for land grabbing by former *kolkhoz* and *sovkhoz* elites (chairpersons, directors, managers). However, from the 2000s onwards, the global race for cheap land arrived in Russia, mainly in this same region of very productive soils, but spreading to other regions. In this period, investments in agriculture have been carried out by national nonagricultural capital (oil, gas, steel etc.), as well as

foreign capital (Visser et al. 2012). In order to promote these investments, the first Putin's presidential term (2000-2004) started with the accomplishment of the 1990s liberal reforms, mainly the adoption of the new Land Code (2001) and the Law on Agricultural Land (2003). Because of that, while in 1990 there were around 25,000 collective farms in Russia, in 2015 there were 285,000 private farms, from which about 40 are agro-holdings with more than 100,000 hectares each one.

Putin's period gave rise to the emergence of a strong export-oriented agriculture in Russia, in which grain became the main export crop and wheat turned into its 'queen'. Accordingly, the historical import-export policy reversed. Whilst the late Soviet Union imported grain to meet the needs of domestic animal farming, and did not export substantial volumes, in the 1990s, the post-soviet State started to import animal products trying to find supply alternatives to a domestic production that had been almost destroyed during the Russian market transition. In another way, Putin's era improved grain production and began to combine grain export and meat/milk import. At the same time, the state program (so-called national project) 'The development of agro-industrial complex' (2006-2007) started to recover the livestock production, resulting in an expressive reduction of meat import from 2006 forward.

The state intervention proceeded in the subsequent public programs for agriculture, keeping focus on an import substitution strategy. These measures resulted in a rapid growth of chicken and pig production by large farms, whereas cattle breeding still remained problematic. Nevertheless, the recovery of livestock production did not reduce the rise of grain export. In fact, it led to the new import-export structure of Russian agriculture, i.e. rising export of grain combined with reducing import. This new structure has clear political roots. As early as 2010, Russian government adopted the national 'Doctrine of Food Security', giving a very particular sense to this expression. Food security was defined as food independence or sovereignty or self-maintenance, which means that the focus was not necessarily on quality, affordability and healthy food, but on providing the conditions to reduce the import dependency of basic food items.

The most impressive data concern wheat production (Fig. 1). While, in terms of area, it increased 'only' from 26.6 million of hectares in 2010 to 27.9 in 2017, in the same period, wheat production jumped from 41,5 to 85,8 KMT (1000 Metric Tons), which is almost 70% of Russian total grain production. This production is concentrated in the South region (Krasnodar, Rostov, Stavropol), Central Black

Earth region (Voronezh, Belgorod, Kursk, Tambov), Volga region (Tatarstan, Saratov, Volgograd) and southern Siberia (Altai).

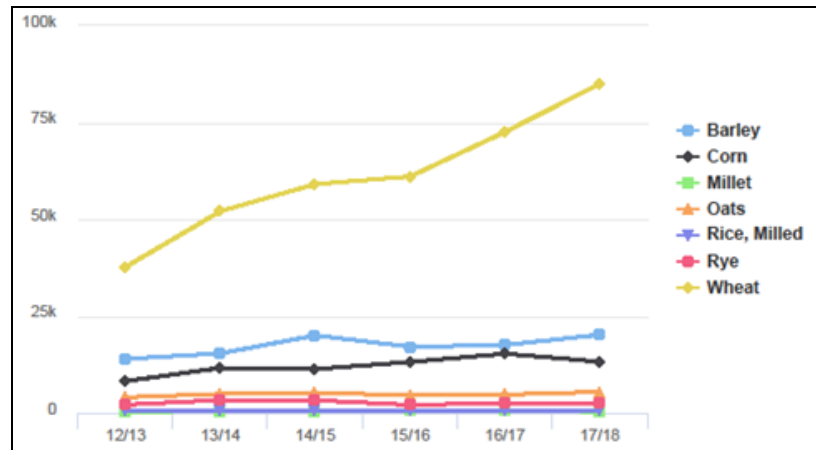


Figure 1 - Russia's grain production (selected products) between 2012 and 2017.  
Source: USDA (2018)

Similar to Brazilian dependency on soybeans, Russia seems to bet most of its chips on wheat production and export. From all this wheat production, exports represented 36.0 KMT in 2017/2018 (Fig. 2), a volume that moved Russia into the number one position of global wheat commercial trade. The major buyers are countries of Middle East (Turkey, Azerbaijan, Iran, Lebanon) and Northern Africa (Egypt, Sudan, Morocco), but, recently, Russian grain exporters are also trying to enter new markets such as Bangladesh and Nigeria.

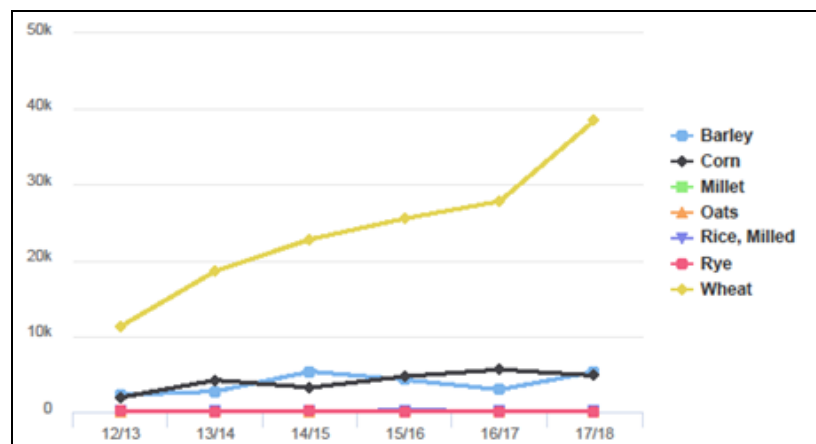


Figure 2 - Russia's agribusiness export (selected products) between 2012 and 2017.  
Source: USDA (2018)

Although the United States still exports the highest dollar value worth of wheat (US\$ 6.1 billion or 15.7% of total global wheat exports; compared to US\$ 5.8 billion of Russia), Russia presents the highest positive net exports, which means the value of a country's total exports minus the value of its total imports for the same product: US\$5.8 billion (compared to \$5.4 billion of United States). Figure 3 reveals the incredible inversion of the net wheat trade since the market reform.

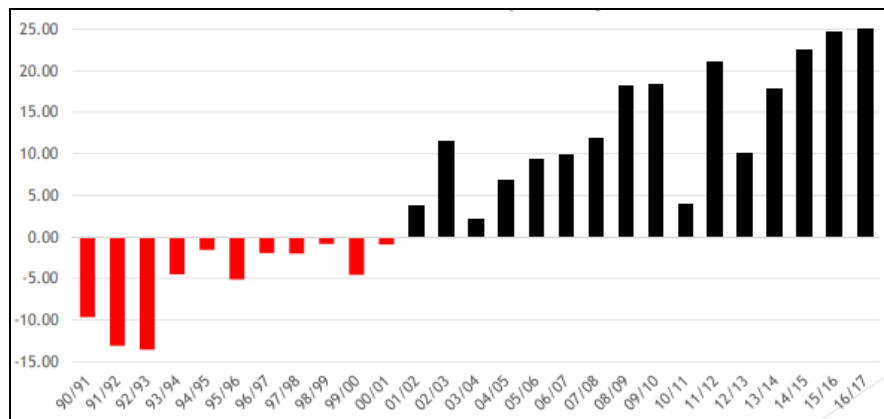


Figure 3 - Russia's net wheat global trade (1990/91 - 2016/17).  
Source: Solaris (2017)

Retrospectively, we could say that Russian government, making efforts to reduce the dependency from global food markets, anticipated the upcoming political confrontation with United States and European Union. In 2014, when these conflicts intensified, Russian government imposed the 'food embargo' as a counter sanction policy to the European and North-American commercial measures. It weakened the competition in the domestic market and had positive effects on the rise of internal agricultural production. The most benefited group was the large corporate farms (the successors of Soviet collective and State farms). Thus, not only due to the embargo, but also as an effect of all policy choices, while agro-holdings became the major economic actor in Russian agriculture, the role of household production has steadily declined. At the same time, individual/family farms are also slowly moving towards classic capitalist enterprises, competing with corporate farms in grain production. Even if they know this is a very risky strategy, they are trying to benefit from the State support for these commodities.

In recent years, Russia has also seeking to ramp up soy production, which, because of the global market expansion, has become matter of interest for the largest Russian agricultural producers. In 2018, soy production represented 3.8 KMT, which are up 8.2% on the previous year. Soy production area increased

2.8 million hectares, up 7.5% year on year, and a chunky 27% on the previous year (USDA, 2018). Nevertheless, for now, just as soy is the Brazilian 'king' grain, this country still reigns in this global chain, in which, similarly to the Russian wheat, the reign is also disputed with the U.S.

From 2003 until 2016, Brazil witnessed a turn from the previous neoliberal State to a new configuration in which the State took a major role in supporting economic growth. The so-called 'neo-developmental State' - or 'socio-developmental State' on account of its active policies against poverty and hunger - tried to conciliate an orthodox macroeconomic policy, maintaining the monetary instruments of the neoliberal governments, as well as the central actors who were in charge of them, and a developmental strategy of State incentives to private investment and consumption (Bresser-Pereira 2016). Likewise, in the political realm, this State was associated with a governance system shaped by 'governments of coalitions'. Some political scientists use this concept to describe an institutional configuration in which the government is formed by actors with divergent interests and advocating in their own benefit, which imposes the continuous necessity of compromise in order to have the institutional stability markets require (Sallum Jr. 2003).<sup>2</sup>

Concerning the rural development strategy, this model of government operated contradictory compromises. For instance, it tried to conciliate investments in production and export of primary commodities, increasing capital concentration, with policies that aimed to reduce poverty and social vulnerabilities in rural areas, which is accentuated by the concentration of capital. Because of that, some authors have suggested that this model of development produced a "compensatory State" (Gudynas 2012), in which the money from the export of mineral and grains was used to promote social policies, whose focus were on alleviate problems frequently created by the very model of accumulation. This is one of the most contradictory faces of such development strategy. Another example could be found in the environmental issues. While, during Lula's and Dilma's governments, Brazilian State was relatively successful in reduce deforestation in the Amazonian region, on the other side, its policies promoted the 'boom' of grain production, increasing the economic pressure on land and other natural resources. Thus, while global eyes were focused on the Amazonian forest, the deforestation quickly advanced on other biomes, mainly in

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<sup>2</sup> This system is also one of the reasons why Brazilian State has historically be characterized by an endemic problem of corruption, which generally is related to the needs governments have to please its allies in order to assure 'governability' conditions.

the Cerrado, “the true Brazilian environmental tragedy” (El País, 2018). The main responsible for the destruction of this savanna-like biome has been the soy production expansion over a huge region called Matopiba, an acronym formed with the initials of the states of Maranhão, Tocantins, Piauí and Bahia (Pereira and Pauli 2016).

While the number of soy producers decreased between 1975 and 2017 from 487 to 235 thousand, in this period the volume of production increased from 8.7 to 103 KMT. Most part of this expansion happened after 2006, when the number of producers was 217 thousands and the production reached only 46.1 KMT. It shows important gains of productivity, but also a process of land concentration, which is somehow associated with the nature of an activity with low differentiation, in which gains of scale have become essential, as well as the optimization of technology and the negotiation of larger volumes in order to reduce costs of production, transportation and transaction. According to the new agricultural census data (IBGE 2018), between 2006 and 2017, the area occupied by agricultural establishments grew from 333.7 to 350.3 million hectares in Brazil. Nonetheless, there was a 2% reduction in the number of properties, from 5.17 to 5.07 million units. In relation to the size of the properties, 50.8 thousand units with 1,000 hectares or more (around 1% of the total) increased their control on the total agricultural area from 45% to 47.5%. At the same time, the percentage of units with rented land decreased from 6.5% in 2006 to 6.3% in 2017, but the amount of rented area increased from 4.5% to 8.6% of the total area. It demonstrates, among other things, the interest of foreign agro-holdings (mainly Argentinean groups) in soy production, yet avoiding the immobilization of their capital in land acquisition (Wesz Jr. 2016).

Brazil has also been one of the main focuses of global land grabbing, a process catalyzed by the expansion of a vulture capitalism that include even violent and illegal practices to access and control land, and, more widely, water and natural resources (Sauer and Leite 2012). In this sense, Figure 4 demonstrates soy production spreading out in direction of the Amazonian region and the Cerrado, two regions where the soy production has penetrated in areas of forest or livestock production, frequently occupied by traditional peasant communities. In the province of Mato Grosso, Brazilian leader in soy production with 29 KMT (28% of the national amount), and where 106 of 140 municipalities produce soy, the agricultural area grew from 48.7 to 54.8 million hectares. Most part of this process was concentrated in the largest farmers specialized in soy production, including those now controlled by foreigners investors (Ioris 2017; Martinelli et al 2017).

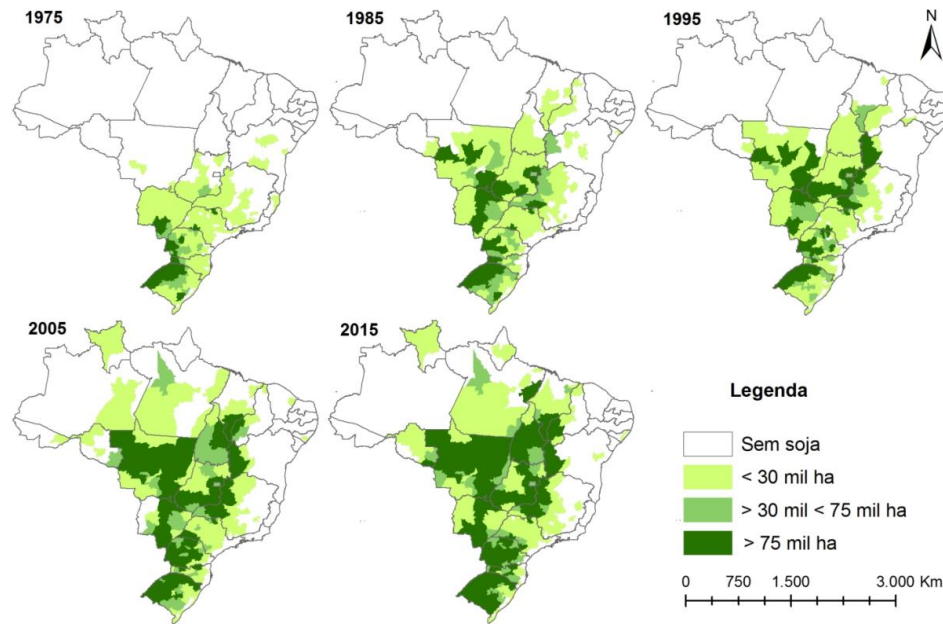


Figure 3 - Evolution of the area (hectares) of the soy production in Brazil.  
Source: Niederle and Wesz Junior (2018)

At the same time, soy production has spread to the new regions of the Southern Brazil, where the industrial production of soy began in the 1960s, and where 83% of all soy producers are still operating. However, there are almost no more 'empty lands' to grab - the exception being the Pampa, a biome traditionally occupied by livestock production in the frontier with Uruguay -, this crop has occupied the area formerly used for other crops. For instance, between 2000 and 2017, the area of maize reduced around 50% in the state of Rio Grande do Sul, from 1.6 to 0.7 million hectares. It means that the narratives about the 'success' of the Brazilian agribusiness generally mask the fact that, in the same period soy production exploded, many other products have not seen any significant increasing of production or productivity (Fig. 5). The most relevant examples are beans and rice, the two most typical foods of the Brazilians daily diet. Between 2000 and 2017, the area of rice production decreased from 3.7 to 1.97 million hectares, whereas the production increased only from 11 to 12 million tons. At the same time, beans production reduced from 4.4 to 3.1 million hectares, and beans production stabilized in 3.1 million tons. Although someone could imagine that this stagnation indicates a stabilization of the domestic consumption, in the last years Brazil increased beans import, mainly from China.

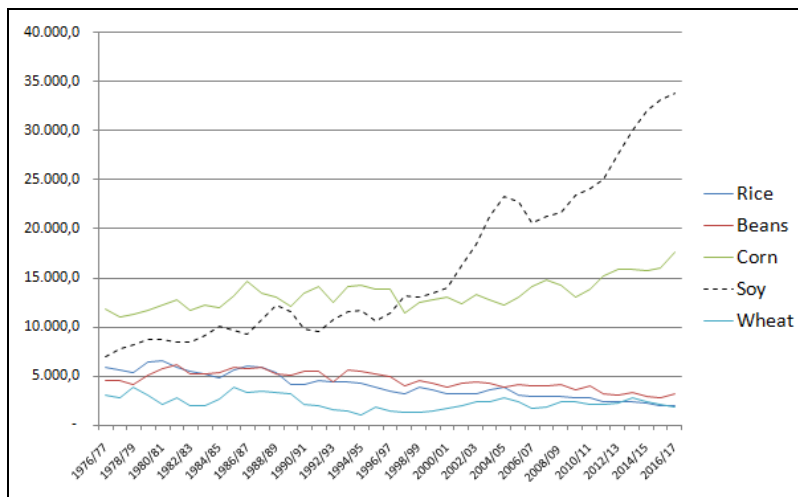


Fig. 4 - Cultivated are of grains in Brazil (thousand hectares).  
Source: Conab (2018)

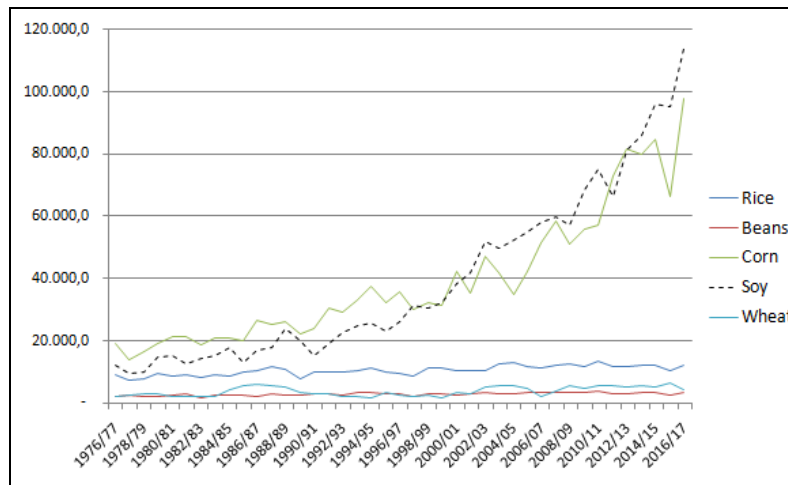


Fig. 5 - Production of grains in Brazil (thousand tons).  
Source: Conab (2018)

Over the last two decades, soy has become the most significant Brazilian export product, representing, in terms of value, around 20% of all exported products and half of the agribusiness sector. Figure 6 demonstrates the expansion of soy exports in the last two decades. Despite some periods of reduction or stagnation, which indicate frustrated harvest, the trajectory is impressive, mainly when we compare soy export with other grains and products. There is no other product with similar records of export growth, and most of them presented very irregular trajectories. In 2017, although Brazil was not the global leader in soy production (114 KMT, or 31%, against 33% of US), this country was already the biggest soy global exporter (68 KMT, or 42.5%, against 39% of US). The main responsible for that trajectory has been the Chinese demand. In 2015, Chinese purchases

accounted for 57% of the total value exported by Brazil (R\$ 16 billion). In 1997, this percentage was only 11% (R\$ 0.61 billion).

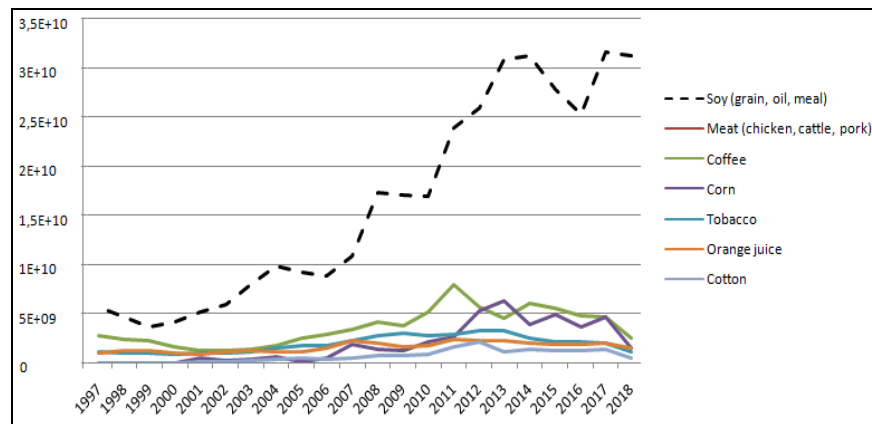


Fig. 6 - Brazilian agri-food export between 1997 and 2018 (US\$ Dollars).

Source: Brazilian Ministry of Foreign Affairs.

Oliveira and Hecht (2017) consider the Brazil-China soy-meat complex as one of the main expressions of a new global food regime (). However, it could also question the idea of a “neoliberal food regime” (McMichael 2016, Ioris 2018). The problem is how to measure or qualify the regime of accumulation in agriculture according to a more neoliberal or neodevelopmental State actions. In accordance with Thellen (2012), we could say that the problem here would be how to “define the precise and discriminating analytic tool we need to grasp the rather different implications of different “liberalizing” moves.” The reference to the adoption of deregulation policies frequently hide the existence of a much more contradictory State action, in which deregulation of some activities coexists with a more general idea of coordinate economy. In the case of Brazilian soy production, it is understandable when we reflect on all tax benefits State has directed to this sector, as well as his credit, rural extension, mechanization and insurance policies (Grisa and Schneider 2015). The most impressive data concerns the number of tractors, which grew 49.7% between 1996 and 2007, accumulating now 1.22 million units, most part of which was financed by State policies for agricultural modernization.

Another example of this contradictory neo-developmental State action is related to the way it tried to consolidate the previously established dualism between agribusiness and family farming. At the same time as Lula’s and Dilma’s governments favored the recognition of family farming as an important category for rural development policies, the export-oriented model of agrarian development remained largely privileged. In recent years, however, the coexistence of different policy referentials guiding the State action for rural

development contributed to amplify conflicts and to created hybrid configurations (Niederle et al. 2017). Initially, the expansion of large farms and corporations on the land of family farmers and traditional communities has created a scenario of intense conflict, a problem for which the State lost its capacity of conciliation. Afterwards, these conflicts intensify inside the different coalitions. On the one side, some large farms realized that, despite its capital stock, they would not be able to compete with transnational corporations and financial funds more and more interested in control land and commodities in a context of the global agricultural prices “boom” of the 2000s. On the other side, a strong process of social differentiation also implicated family farmers. In the southern Brazil, an expressive group of family farmers were also attracted to the global commodity markets, some of them invested their resources in soy and corn production, whose high prices compensate the little scale of production. Other invested in the pig and chicken production, making family farming the main responsible for the supply of this meat in domestic and international markets. However, most of the family farmers have been completely excluded from this new process of modernization, as well as from the public policies that have supported it.

In the mid-2000s, at the same time the global crisis affected the profitability of other economic sectors, agriculture became one of the safest ports for the financial capital inversions. However, from 2012 onwards, the boom of the commodities prices has decelerated, and, at the same time, agricultural costs have quickly increased. The decline of the Chinese demand, and, more recently, the global trade battles associated to the rise of the protectionism, has defied the Brazilian strategy of development. Because of that, after a period of relatively calm coexistence between contradictory strategies and coalitions, the compromises started to collapse. In order to keep the gains, large farms representatives started to demand more flexible regulation on land, work, deforestation, and inputs markets, as well as new measures to alleviate private debts. Although some of these demands were met by the previous government in a tentative to calm down the political coalition created around the export-oriented agribusiness, they were considered unsatisfactory, and this group became one of the most important forces supporting the impeachment of Dilma Rousseff, as well as the return of a neoliberal State.

## **5. Conclusions: contrasting trajectories**

The Food Regime approach was projected as a historical method of “incorporated comparison” (McMichael, 1990). Nevertheless, this comparison of the role of agriculture in the world-system has led several scholars to overemphasize an excessively unitary and coherent global food regime. While recognizing this approach offers analytical tools to understand global trends, this paper suggests that Russian and Brazilian agrarian development put under question some statements of the food regime approach. The contemporary insertion of both countries in the global markets suggests some divergences in their positioning in the food regime genealogy, especially in the “neoliberal” food regime from the 1980s onwards.

Concerning the first food regime (Imperial-Colonialist, 1870-1920), while Brazilian economy more or less easily incorporated into a British centered world-system, the Russian Empire held a very specific position. On the one hand, the rise of Russian wheat export coincided with the establishment of the global food regime in 1870s. The emerging of American wheat-meat complex made European farmers to switch from this market. At the same time, when European markets opened, mainly for American wheat, Russia also took this opportunity and started the wheat export. On the other hand, Russia stayed on the margins of the food regime because its agriculture, still based on traditional peasants with little signs of the transition to capitalist agriculture (family farmers), did not follow the global trends, which the emerging food regime imposed. Furthermore, Russia was neither a colony nor a colonialist country - although someone may argue that agricultural colonization of Siberia took place then, it was a very different (internal) colonization process. Briefly, Russia took advantage of the emergence of the first international food regime but was not its inherent part and did not transform its agriculture according to the new requirements.

During the second international food regime (Mercantile-Industrial, 1940-1970), Brazil was closer (and subordinated) to the new center of global power, the U.S., adapting its agriculture to the American modernization project, whereas the Soviet Union had kept another position in the international geopolitics. Even if the Soviet geopolitical power indirectly influenced the emergence of this food regime, the Soviet agriculture had its own dynamic. Even so, we can recognize common dynamics that are responsible for the parallel trajectories on which national developments historical move. For instance, both countries witnessed periods of forced agricultural modernization greatly influenced by State policies. In Russia, the most impressive example was the land collectivization policy of the early 1930s in the Soviet period, which combined the communist ideology with the switch towards large, mechanized agricultural enterprises. In Brazil, it

was the case during the military dictatorship of the 1960s-70s, which was responsible for a compulsory and authoritarian process of capitalist agrarian development. Thus, yet following different ideological perspectives, in both countries the modernization of agriculture was largely driven by the State during the second food regime.

Both in the capitalist Brazil and in the Soviet Russia, the debt crises of the 1980s ruined the State capacity to sustain the same model of agrarian development. The huge economic and political reforms both countries incorporated at the end of this decade changed the regime of accumulation and the forms of regulation in agriculture. During the 1990s, the new Brazil democratic State incorporated the liberal agenda, opening markets for foreign capital and directing its economy to promote the export-oriented agriculture, in which soy became the king. At the same moment, the post-soviet Russia reorganized the *kolkhozes* and *sovkhozes*, and introduced a new market economy, thus joining the global neoliberal order. Nevertheless, at that moment, Russia had not yet started a project of support to an export-oriented agriculture and foreign investors were not much interested in Russian agriculture. Therefore, in the 1990s, neither Russia did have any effect on the global agriculture, nor global agriculture really influenced the domestic market dynamics.

While in the new century Brazil preserved the export-oriented agrarian development, it marched towards a more coordinated economy, in which the State played a central role to keep catch the agribusiness (Delgado 2012). This trajectory was not radically different from the previous decade, even though the neoliberal narrative was partially replaced by a type of neo-developmental strategy between 2003 and 2016. In fact, over the last three decades, all Brazilian governments, from the most liberal to the most developmental, have contributed to a process of economic 'regressive specialization', which means an increasingly economic dependency on basic commodity production and exportation. However, proving the high level of contradictions that define the Brazilian neo-developmental State, these same governments were also fundamental to the consolidation of the family farming and, along with that, to the stabilization of the domestic market, which, among other things, involved the numerous food security policies that made Brazil a global reference in this issue.

During the same period, Russia has developed a specific variety of agricultural modernization, which combined an emergent export-oriented grain sector and an overall orientation towards protectionism and food independence. The Russian neo-developmental State has also created favorable conditions for the

expansion of private corporations, leading the country to become a major player in global food markets. Nonetheless, while in Brazil financial and transnational capital has been an important force in agriculture since the 1990s, the main drivers of the post-soviet agrarian dynamics still were internal capital and national oligarchy. This trajectory was followed by a national project called 'The Development of agro-industrial complex' (2006-2007), by means of which the government maintained high subsidies to agricultural production and export. It has reinforced the position of large farms as the main driver of agricultural growth, as well as an export-oriented strategy that focused on wheat production.

Both countries became the main competitors of the United States on the global food markets; Brazil with soy and Russia with wheat. However, there is another difference here. While Brazil soy export competes with the U.S. in the same markets, essentially for the Chinese demand, which, in 2017, was responsible for 57% of Brazilian and 60% of U.S. soy exports, Russia and U.S. still have different markets for wheat. Russia exports its wheat mostly to Middle East and Northern Africa regions, while the top regions of destination for American wheat are Far East and South East Asia represented by Japan, South Korea, Philippines, Indonesia, and Thailand. In addition, U.S. wheat goes to North and Central American countries such as Mexico and Guatemala. Even though, as early as a decade ago American wheat had strong positions in Northern Africa, Russian wheat has pushed U.S. out from this market by winning price competition (Newman and Parkin 2017).

Marson (2018) has suggested, "the growing Russian competition is one more pressure point threatening American farming, which is facing the biggest wave of farm closures in the U.S. since the 1980s". We could say the same with regard to the position that Brazil has been occupying not only in soy production but also in other agricultural markets, as in the case of meat. In addition to demonstrating the emergence of a multi-driven agro-food economy, all these movements question the central role played by the States in agriculture - and here it would also be important to consider the role that Chinese state-owned companies have played in these markets. Finally, a more substantial difference between both countries concerns the fact that, while Brazil remains predominantly committed to the market liberalization agenda, Russia has adopted a strongly protectionist agenda, which adds one more ingredient in this confusing puzzler that some scholars try to define as the third international food regime.

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