

AGRIBUSINESS EXPANSION AND
THE DISPUTE FOR THE CERRADO

HOLD

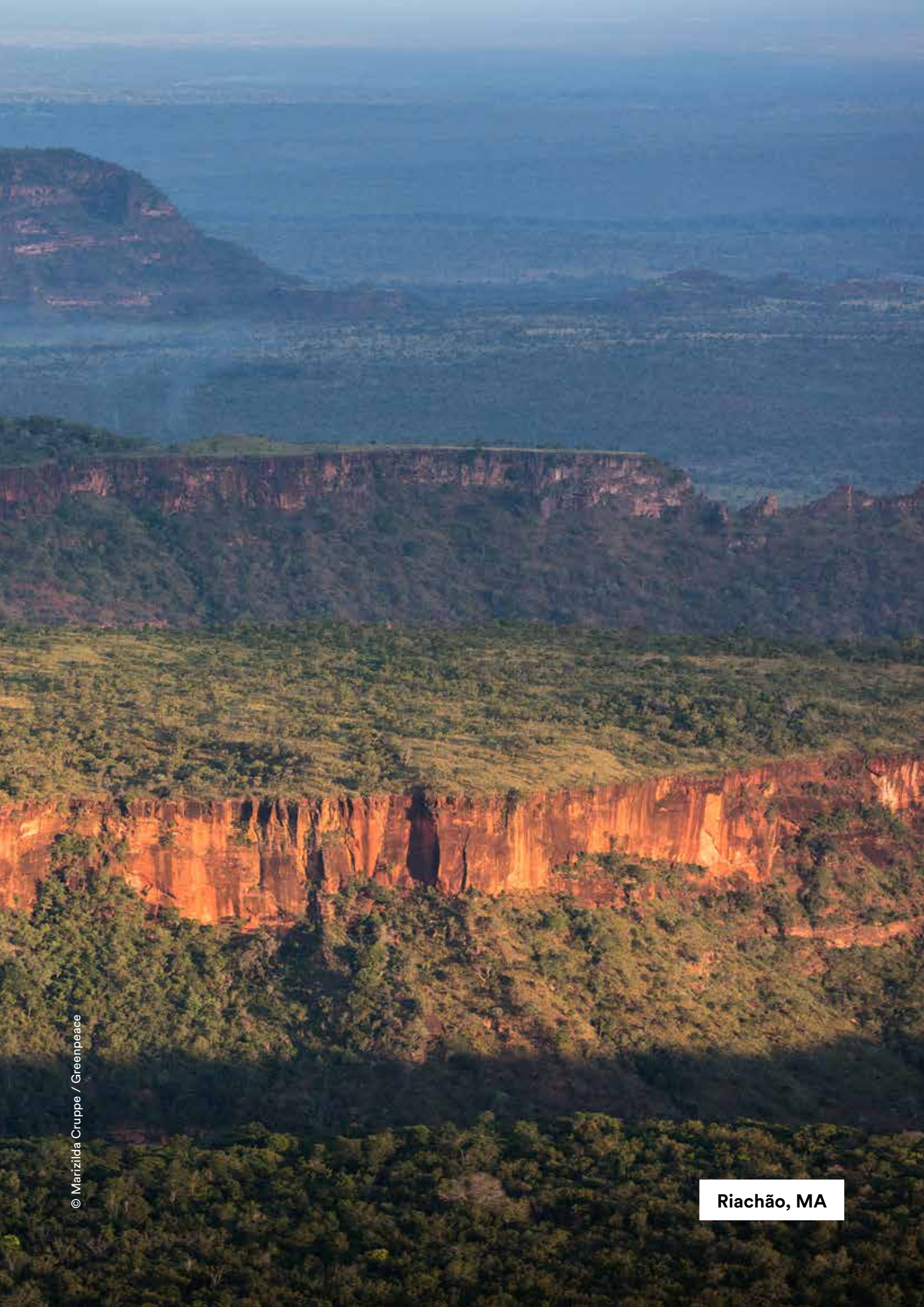
THE

LINE



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THE NARRATIVE

The dominant discourse

Soybean farming is beneficial to the region.

Environmental degradation is the “inherent cost of progress”.

The sector leaders follow the law.

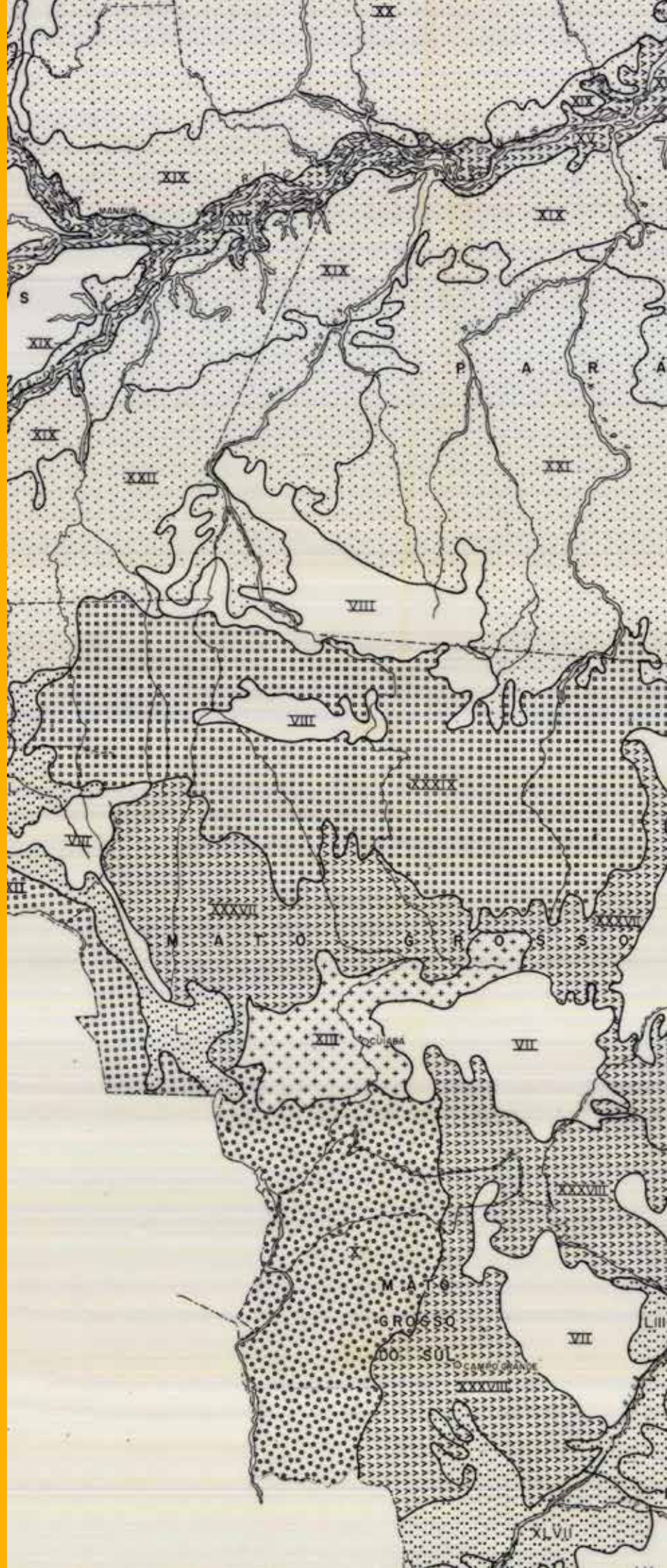
There is a growing acceptance of conservation practices.

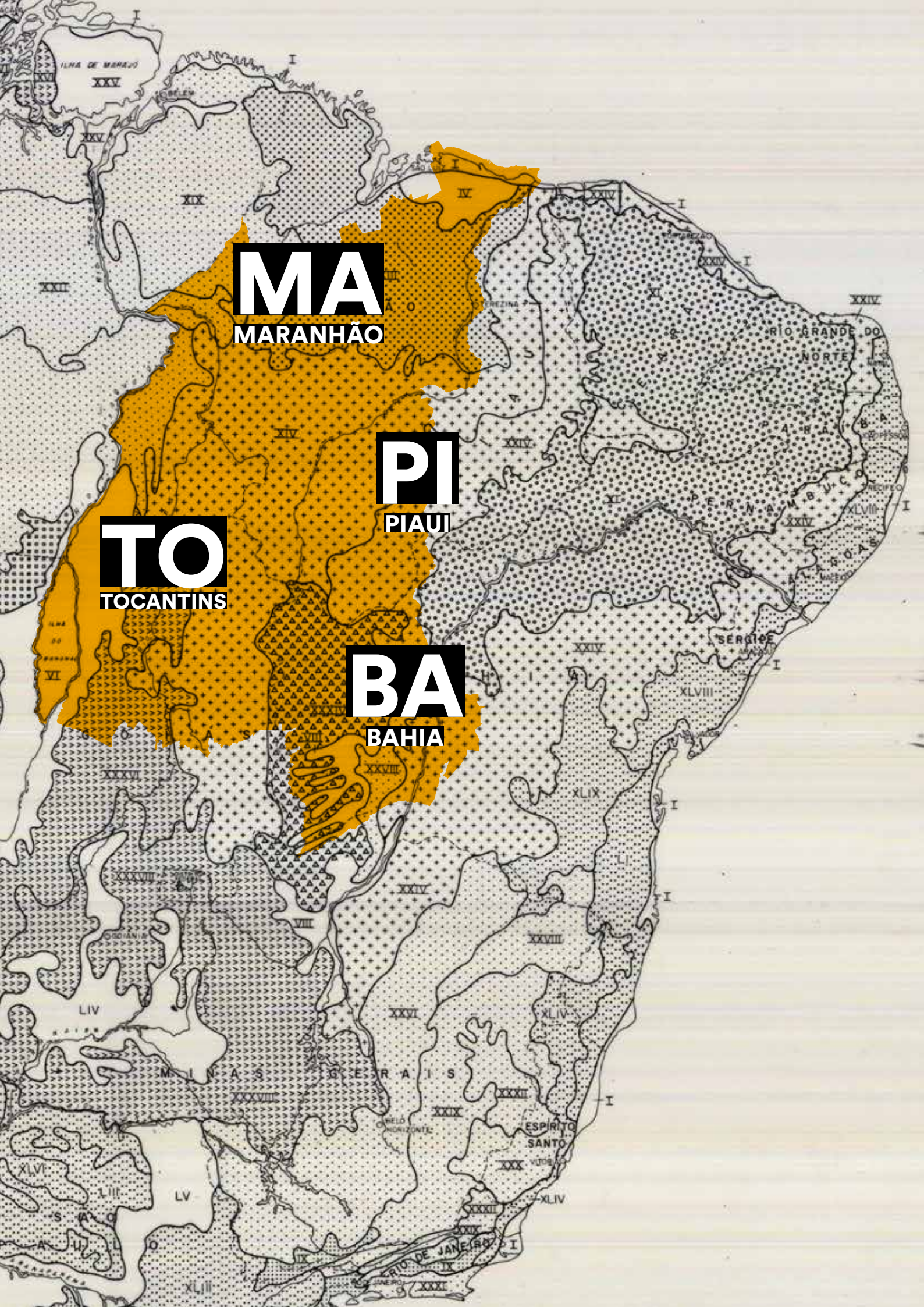
The opposing discourse

The expansion of farming represents a threat to the environment and traditional communities.

The territory is gradually falling into the hands and the control of transnational groups.

In yellow, the region of MATOPIBA, which is part of the Cerrado biome in Brazil.





MA
MARANHÃO

PI
PIAUI

TO
TOCANTINS

BA
BAHIA

INTRO- DUCTION

#Matopiba

The debate surrounding the expansion of farming into new areas of the Cerrado is split into two schools of thought¹. On the one hand, there is the dominant discourse regarding the expansion of soybean farming, supported by the main organizations and leaders of the business sector and those associated with it. They argue that this activity is fundamentally beneficial to the region, an area that was characterized by a sluggish economy and problematic social indicators before the arrival of investments in the production of soybeans. The marked removal of forest cover, criticized by environmentalists, is acknowledged by the organizations and agents associated with the agribusiness sector, but presented as a kind of “**inherent cost of progress.**”

When responding to critics of environmental degradation, representatives of the sector repeatedly affirms that they follow the law. They refer to alleged compliance in the conservation of land with forest cover for legal reserves, the adoption of instruments such as environmental licensing for farming, when required, or respecting norms when using pesticides and other chemical inputs, among other themes. **Cases of noncompliance with legal requirements are treated as exceptions.** Additionally, the political positioning of industry organizations, calling for a loosening of some of these legal frameworks, does not appear in this discourse. A corresponding narrative is also found in academia. Researchers that explore the theme^{2,3} consider that despite the economic, political, and environmental problems, the new

Hold the line

pattern of accumulation established in Brazilian agriculture and practiced along the Cerrado frontier is predominantly positive. Moreover, many researchers also note that a change in behavior is underway in the sector, with the increasing use of conservation practices such as direct seeding, diversification in the rotation of crops, and new technologies that conserve resources: typical approaches to what is being called precision agriculture.

On the other hand, the discourse from social movements and partners emphasizes the opposite, citing negative aspects^{4,5,6} that certainly exist. In this latter narrative, the emphasis has been placed on the effects of the expansion of farming on the environment and traditional communities. **In addition to the loss of forest cover and the erosion of biodiversity, the theme of water resources has become increasingly relevant.**

In Matopiba, these themes launched the Cerrado to the forefront of the discourse of non-governmental organizations (NGOs) that work in the field of environmental issues, since this region contains most of the biome's remaining native vegetation. Also contributing to this recent attention is the growing international interest in investing in this area. The presence of foreign groups is growing in the wake of processes that have increased the value of land as a financial asset. **The image that stands out in this narrative is one of a region whose natural resources have been subject to violent exploitation, resulting in enormous losses to the communities that previously depended on**

these same resources to maintain their ways of life. Equally strong is the image of a territory that is gradually falling under the control of transnational groups, reducing the autonomy and sovereignty of the country over its strategic resources against the backdrop of a future strongly marked by climatic change and the scarcity of some valuable resources available in the region, such as water, land, and biodiversity. This narrative is echoed in publications by social organizations, such as the Indigenous Missionary Council (CIMI), Rede Social de Justiça e Direitos Humanos, and Action Aid, and is also found in widely respected scientific works.^{7,8,9,10,11}

Within this context, the objective of this study is to determine whether evidence that would cast doubt over the dominant narrative on the expansion of soybean production in Matopiba exists. At the same time, this study critically examines existing contradictions and ambiguities, a necessary step in finding alternatives and searching for solutions to the problems outlined. Therefore, the hypothesis is that a thorough analysis of the dynamics unleashed by the expansion of soybean production will not corroborate the predominant discourse of industry agents or the commonly held belief that deforestation is an inherent cost the economic and social progress of the region.

In addition to the environmental costs, there are also long-term economic and social costs which are being hidden by apparent gains in the short term. In other words, the region is being transformed into an enclave for the production of commodities with spatially limited positive effects, without lasting benefits to the social fabric of the region.

#Matopiba

What's more, this progress could itself be called into question due to an increase in social inequality and the generation of a highly concentrated and specialized economic dynamic with limited environmental resilience, capacity to create jobs, and ties to local communities. In addition to the environmental costs, there are also long-term economic and social costs which are being hidden by apparent gains in the short term. In other words, the region is being transformed into an enclave for the production of commodities with spatially limited positive effects, without lasting benefits to the social fabric of the region.

Hold the line

To arrive at the sought-after results and test the hypothesis presented, the study was carried out in two major phases. The first was based predominantly on the use of secondary data. The second involved fieldwork in the selected regions, in addition to interviews with key informants situated in the capitals of the four states and in Brasília.

The first phase, based on secondary data, focused on the period between August and November of 2017 and was composed of the following procedures:

- _ Harmonization of vegetation cover extracted from MapBiomas's database and CNPq/UFABC/Cebrap research group databases for socioeconomic indicators;
- _ Construction of typologies for municipalities and definition of areas for in-depth research through fieldwork.

The second phase

involved a qualitative analysis based on the following procedures:

- _ Field research in four territories (Tocantins: Arraias, Mateiros, Pedro Afonso, and Campos Lindos; Bahia: Correntina, Formosa do Rio Preto, and Barreiras/Luís Eduardo Magalhães; Maranhão: Balsas, Carolina and Tasso Fragoso; Piauí: Uruçuí, Bom Jesus, and Baixa Grande do Ribeiro) for a total of 150 interviews conducted between December 2017 and March 2018;
- _ Interviews with key informants situated in capital cities, but outside of the territories selected – Palmas, Salvador, São Luis, Teresina, and Brasília.

THE BEGINNING

1960's and '70s

The National Integration Program (PIN) boosts investment in infrastructure. It focuses on building interconnected highways in the north and northeast of the country, to encourage the expansion of commercial fronts.

1980s and beyond

The second phase of the Japanese-Brazilian Cooperation Program for Cerrados Development (Prodecer) is launched, with an initiative to produce soybeans for export and regional development.

Area being prepared for plantation, in Maranhão.

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THE

CERRADO

BEFORE

MATOPIBA

The origins of the wave of modernization that took hold of the region at the turn of the 21st century dates back to the expansionist period when regional integration was prioritized by the Brazilian government. Two key drivers stand out. The first was a set of initiatives that started in the 1960s, under the Juscelino Kubistchek administration, and intensified in the 1970s under the military government. The National Integration Program (PIN) in particular was designed to encourage the expansion of commercial fronts, investing in infrastructure and the building of interconnected highways in the North and Northeast of the country. A second movement involved two actions that drove the development of modernized agriculture in Western Bahia. One was the launch by the state government's Secretariat of Planning, Science, and Technology, in partnership with the Japan International Cooperation Agency (JICA), of the second phase of the Japanese-Brazilian Cooperation Program for Cerrados Development (Prodecer) whose first version had been implemented in the central-west states, marking the beginning of the initiative to produce soybeans for export in that state¹². The other was the establishment of the Experimental Agricultural Station of the Cotia Cooperative, in the area surrounding Mimoso do Oeste, where the first seedlings of the grain were planted.¹³

For the military government, it was important to provide a response to the growing agrarian conflicts and, at the same time, boost the production and the productivity of this sector, in order to reduce foreign dependence and increase the supply of food in a context of accelerated urbanization and the rising costs of the social reproduction of work the country was experiencing. All of this, however, had to be done without undertaking the structural transformations called for by progressive forces at the time, such as the distribution of land.

Two sets of initiatives shaped this project. The first set of measures involved, in the 1960s, the formation of an entire legal apparatus for state regulation of the agrarian issue in an authoritarian context^{14,15}. Examples of this were the creation of the Rural Worker Statute and the Land Statute. The former recognized some of the fundamental rights of workers, but it also established differences between the rural and urban job markets. The latter regulated the use and occupation of land in Brazil and was relatively advanced for the time. The statute provided for a classification of farming establishments and recognized the importance of the state in ensuring that farmers had access to enough land to support themselves. This legal apparatus formed the basis of the creation of the National Institute for Colonization and Agrarian Reform (INCRA), years later. However, a real agrarian reform was never carried out.

In Brazil, land conflict was controlled by transporting farmers who demanded land in southern Brazil to far-flung areas of the Amazon without infrastructure. While these measures by a dictatorial and conservative government may seem paradoxical, they were part of an effort to modernize and absorb social conflict – the government’s overriding interest was in **limiting the capacity for workers to mobilize and thwarting any challenge to the agrarian structure.**^{16,17}

The second set of agricultural and agrarian policies created during the military government were the Agroindustrial Complexes (CAI). These were part of a strategy to modernize agriculture¹⁸ whose main instruments were:

A. Promotion and dissemination of technological research;

B. Integration of capital in order to incorporate land capital into a business environment and, simultaneously, to create investment opportunities for industrial and financial capital;

C. Promotion of and incentives for conditions external to the farming sector.

Prodecer was the expression of this model. It took shape with a cooperation agreement between the governments of Brazil and Japan in 1974.¹⁹ Among the main objectives of the program were an increase in the supply of agricultural products, primarily soybeans, and the development of the Brazilian Cerrados, at the time an agricultural frontier. The agreement involved the creation of a holding in Japan and another in Brazil, which together formed a company responsible for implementing the program. It was up to the Brazilian Agricultural Research Corporation (Embrapa) to adapt the cultivation to low latitudes and more acidic soils, which enabled

the enormous expansion of crops in the lands of central Brazil. The program is currently in its third version and now covers the northern part of the country, with the expansion of soybeans plantations pressing in on the edges of the Amazon.

The main beneficiaries of the investments were medium-scale and large-scale farmers, who underwent an intense process of capitalization and technification, supported by the agricultural policy instruments created during that period. However, a segment of better-capitalized family farmers, primarily hailing from southern Brazil, where the agricultural frontier was being exhausted, also benefited. The children of the family farmers of that region, marked predominantly by small farming establishments, saw the expansion into the new agricultural frontier of the Cerrado and the edges of the Amazon as a way to acquire new lands at prices below those found in their region. A strong process of social differentiation was therefore established through the creation of a segment of family producers with technical know-how and large landholdings in central Brazil.

Although probably the most widely known, Prodecer was not the only public program implemented in the cerrados of the four states that compose Matopiba. The 1971 Program for Land Redistribution and Stimulation of Agroindustry for the North and Northeast (PROTERRA) was implemented in areas under the Superintendency for the Development of the Amazon (SUDAM) and Superintendency for the Development of the Northeast (SUDENE). The 1974 Amazon Farming and Agromineral Centers Program (POL-AMAZÔNIA) covered the states of Mato Grosso, Goiás, and what is currently Tocantins. The objective of the Cerrado Development Program (POLOCENTRO), created in 1975, was to develop and modernize farm-

ing activities in the central-west and western parts of the state of Minas Gerais. It is also important to mention the Irrigation Equipment Financing Program (PROFIR) of 1982, which encouraged the use of modern irrigation in the areas of the Cerrado. Yet among the programs to incentivize production, the most prominent was Prodecer (phases I, II, and III), intended to “demonstrate and replicate a new agricultural model for occupation of the cerrados” through the creation of large farms, coordination of farmers into cooperatives and provision of business support and training for the adoption of capital-intensive technologies – with a view to increasing the production of soybeans.

Based on these types of incentives, the areas of the cerrados²⁰ of Matopiba began to be occupied, albeit in very different ways. A farmer from Paraná who today plants around 80,000 hectares of soybeans, corn, and cotton recounts his experiences upon arrival in 1986. His family initially purchased 300 hectares, planted with soybeans and rice, taking advantage of the knowledge of these crops they had already acquired in their state of origin. Why come to Bahia? **Availability of cheap land and water**, he says, noting that, at the time, a hectare in southern Brazil cost the equivalent of 100 sacks of soybeans. In Bahia, the same area could be acquired for the equivalent of 3 sacks: 33 times less. The states of the Central West – the second frontier for the expansion of soybeans before Matopiba already had intermediate land prices.

In addition to the attractive price of land acquired from private owners, there were other advantages, such as the possibility of irrigation, enabling farmers to postpone planting. With less rainfall during the harvest season, the quality of the product improves and better prices can be achieved. These same local conditions also allow for an annual har-

For the military government, it was important to provide a response to the growing agrarian conflicts and, at the same time, boost the production and the productivity of this sector in order to reduce foreign dependence and increase the supply of food – without undertaking the structural transformations called for by progressive forces at the time, such as the distribution of land.

vest and another smaller harvest, increasing revenue, which partly explains the strong regional competitiveness. One of the large processing companies, Cargill, soon established itself in the region and began to play a supporting role by purchasing, financing, and even disseminating new technologies. **Southern entrepreneurship was boosted by an invisible hand, not from the market, but from the state, and from natural conditions that helped to make farmers successful.**

Some of these lands were purchased from third parties – that is, not the original owners, but people who presented themselves as the legal owners and sold the lands to interested parties from other regions through different methods and at times, at times fraudulently. This side of the modernization process is not addressed in official documents, but is known in sociological studies of rural Brazil. One of the most perverse faces is land fraud and the violent practices associated with it. According to the Association of Attorneys for Rural Workers (AATR) of Bahia,²¹ the land grabbers purchase smallholdings from local residents that have been registered in land registry offices. They accumulate a certain number of these holdings and then combine them into a single title so it can be registered as their property.²² In other cases, documents attesting to the ownership of unsettled land or land currently under acquisitive prescription are simply forged.

The term *grilagem* is derived from the practice of placing documents in boxes with crickets so that they acquire a yellowish tone and therefore give the impression of being issued sometime in the distant past. Often, the owners of registry offices in small cities are complicit in this practice, who; despite knowing the fragility of the documentation, they issue registrations that are then used in legal actions

to ratify the validity of the property transfers. Claimson these properties are often associated with violence to remove residents, who are often the legal owners, from the land, thereby giving rise to enormous conflicts. It is not known exactly what portion of the land titles are completely legal and how many are legally questionable.

In Matopiba the highlands and plains, suitable for mechanization, were occupied in this manner. They were not empty demographic spaces, as is sometimes asserted in official discourse. These plateau areas were used by local populations, almost always residents of the lowlands. They herded cattle there during part of the year, and hunted and collected fruits and roots, which composed a fundamental part of their livelihoods and was integral to social reproduction. With the transformation of these vegetations into cultivated areas, part of this population migrated to other places, like distant urban centers; others restricted themselves to the lowlands, where they still concentrate today, but now with less access to cultivable land.

The coexistence of entrepreneurship with illegal practices is everywhere on Matopiba. In the south of Piauí it dates back to the 1970s, when the state government created a mixed economy company to distribute land to the private sector. In 1976, extensive areas were sold. There are an estimated 2 million hectares in five different fronts in that region. These areas were transferred to private individuals in tracts of up to 3,000 hectares, and up to 25,000 hectares for legal persons or companies.²³



Grilagem

The term grilagem is derived from the practice of placing documents in boxes with crickets so that they acquire a yellowish tone and therefore give the impression of being issued some-time in the distant past. Often, the owners of registry offices in small cities are complicit in this practice.

IN WESTERN BAHIA, a recent story illustrates this type of conflict. It involves Condominium Estrondo, in Formosa do Rio Preto, one of the top soybean producers in Brazil. The story began almost four decades ago, when a businessman from Rio Grande do Sul, Ronald Levinshon, purchased a large amount of land by acquiring holdings from various local residents.²⁴ Mr. Levinshon was a former president of Caderneta de Poupança e Crédito Imobiliário Delfin living in Rio de Janeiro. Recently, the heirs of the previous owners began to contest the land purchase, to the extent that the National Council of Justice intervened in the legal battle²⁵ and froze the title to the property, which covers 405,000 hectares.²⁶ On another front involving the same company, the *geraizeiros* that live close to the Rio Preto River – a traditional population from the Brazilian Cerrado – obtained an injunction to retain ownership against Delfim Crédito Imobiliário S/A, Cia de Melhoramentos do Oeste da Bahia (CMOB), and holding company Colina Paulista, which managed the enterprise Agronegócio Condomínio do Estrondo.²⁷

The injunction was published in May 2017, but so far the companies have repeatedly failed to comply with the court decision that stipulated a daily fine of 50 thousand reais,²⁸ which has not yet been applied by the court. Although the legal system has recognized the existence of documentation that proves ownership by the traditional communities for over 100 years, access to part of the area that is rightly theirs is blocked by sentry houses guarded by armed men. The road that crosses the area was obstructed by ditches dug by the enterprise, in order to force those who want to pass go via the blockade, where they are forced to identify themselves and may or may not be allowed to pass. This is a flagrant case of abuse of power. Other abuses have been reported, ranging from aggression and death threats to the kidnapping of community leaders.

The initial motivation was to transform that portion of territory, up until then marked by low economic activity associated with extensive cattle raising, into centers for the production and processing of cashew and production of timber. Years later, the Piauí Land Institute (INTERPI) was created to distribute smaller plots in lower areas. Neither of the economic projects was continued. These programs served only to put an ample stock of land on the market and to provide resources subsidized by public banks to farmers and businessmen – money that was loaned under favorable conditions without most of it ever being repaid. With the expansion of the farming frontier, the region is experiencing an entanglement of land-holding registrations and titles²⁹ which are issued by at least five different public entities: the Piauí State Development Company (CODEPI), municipal registry offices, city governments, INTERPI, and the judiciary itself.

Big companies like SLC Agrícola, SLC Land Co., and Radar Propriedades Agrícolas S/A own land in southern Piauí, according to the document “Transnational agricultural real estate firms and land speculation in the region of Matopiba,” published in 2018 by Rede Social de Justiça e Direitos Humanos. Radar Propriedades Agrícolas is a company resulting from a partnership between Cosan S/A and the pension fund Teachers Insurance and Annuity Association of America – College Retirement Equities Fund (TIAA-CREF). SLC Agrícola – short for Schneider Logemann Company – is an agricultural producer operating throughout Matopiba. SLC Land Co. is its the real estate arm, in partnership with the English investment fund Valiance Capital. These companies have acquired land over the last decade and a half, from farms whose owners stand accused of land fraud in legal proceedings, as is the case of Colonizadora De Carli (CODECA), a very

active firm in southern Maranhão. These accusations are refuted by the accused, oftentimes with the argument that they acted in good faith when purchasing the properties and cannot be held responsible for previous liabilities.

There is a line, tenuous as it may be, that separates the imbroglio described above from communities, such as the ones in Nova Santa Rosa (Uruçuí) or Bom Jesus, where dozens of small farmers from southern Brazil arrived two decades before and organized into cooperatives, most of them still remaining. These are typical southern migrants, who started with 300 hectares and still today own the smaller areas. Many of them, in fact, opened roads and built up the local infrastructure, sometimes with their own resources. All of the legal and political complications for these kind of situations are part of the same process of occupation. The type of relationship with the land and the territory retains a difference that can not be minimized. Similar cases in Maranhão and Tocantins could also be mentioned.

It is not known exactly what portion of the land titles are completely legal and how many are legally questionable.

This is what happened in Matopiba, a region engulfed in conflict and contradictions: over a period of two or three decades, a region of low economic activity became a sought-after frontier, responsible for approximately 10% of the country's production of grains. It is also one of the largest fronts of destruction of forest cover and has high levels of poverty and violence.

This is what happened in Matopiba, a region engulfed in conflict and contradictions: over a period of two or three decades, a region of low economic activity became a sought-after frontier, responsible for approximately 10% of the country's production of grains. Of the 100 municipalities with the highest soybean production nationwide, 10 are situated in Matopiba, as well as some of the Brazil's fastest-growing cities. It is also one of the largest fronts of destruction of forest cover and has high levels of poverty and violence. From an economic perspective, its peak occurred a decade ago when the commodity price boom in the international market drove an even faster expansion of production and land occupation. From a political viewpoint, the peak of social construction in Matopiba was presidential decree no. 8.447 of 2015, signed by then – president Dilma Rousseff and by the Minister of Agriculture, Kátia Abreu – current president of the Brazilian Confederation of Agriculture and Livestock (CNA) and former senator for Tocantins, where she owns companies that raise cattle and, of course, farm soybeans. This decree established the Matopiba Farming Development Plan and announced the creation of a development agency for the region, which still only exists on paper.

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Harvester at full steam to ensure the harvest, in Maranhão.

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Matopiba today

According to Embrapa, the region dubbed Matopiba as delimited in the presidential decree, covers no fewer than 10 mesoregions, four of them partially, and encompasses 31 microregions. It contains 337 municipalities, and spreads over a total area of 73 million hectares. Based on data from the 2010 Population Census, 5.9 million people live there. GDP is estimated to be R\$53 billion, with a GDP per capita of R\$9,000.³⁰ In some municipalities, however, as in Luis Eduardo Magalhães, this amount can reach as high as R\$ 46,000, almost as high as that of the city of São Paulo and above those of cities like Porto Alegre. This production is, however, very much concentrated: data shows that 13 of the 31 microregions produce 76.9% of total GDP.³¹

For the 2013/2014 harvest, the region produced 18.6 million tons of grains. Projections indicate that this number will continue to increase and will top 22.6 million tons in the 2023/2024 cycle, with a cultivated area of between 8.4 and 10.9 million hectares. This grain production is also highly concentrated, as Box 1 shows - data from 2012, published by Embrapa in 2017. In the case of soybeans specifically, only four microregions account for almost 3/4 of production.

NUMBERS

31

microregions

337

municipalities

73 million

hectares (area)

5,9 million

people¹

R\$53 billion

GDP (estimated)

18,6 million

tons

(production of grains)²

Note

1. 2010 Population Census (IBGE, 2011);

2. Crop from 2013/2014

BOX 1
DISTRIBUTION OF SOYBEAN PRODUCTION BETWEEN THE MICROREGIONS OF MATOPIBA, 2012

Microregions	State	Quantity produced (tons)	Relative %	Cumulative %
Barreiras	BA	2,894,546	39.29%	39.29%
Gerais de Balsas	MA	986,166	13.38%	52.67%
Alto Parnaíba Piauiense	PI	800,987	10.87%	63.54%
Chapada das Mangabeiras	MA	406,111	5.51%	69.05%
Alto Médio Gurguéia	PI	361,578	4.91%	73.96%
Jalapão	TO	358,490	4.87%	78.83%
Santa Maria Vitória	BA	310,752	4.22%	83.04%
Porto Nacional	TO	285,460	3.87%	86.92%
Gurupi	TO	185,267	2.51%	89.43%
Dianópolis	TO	170,464	2.31%	91.75%
Rio Formoso	TO	130,576	1.77%	93.52%
Miracema do Tocantins	TO	106,530	1.45%	94.97%
Chapadinha	MA	93,900	1.27%	96.24%
Porto Franco	MA	92,866	1.26%	97.50%
Bertolândia	PI	65,365	0.89%	98.39%
Chapada do Alto Itapecuru	MA	23,946	0.33%	98.71%
Araguaína	TO	22,261	0.30%	99.01%
Alto Mearim e Grajaú	MA	18,530	0.25%	99.27%
Bico do Papagaio	TO	17,880	0.24%	99.51%
Baixa Parnaíba Maranhense	MA	14,062	0.19%	99.70%
Chapadas do Estremos Sul Piauiense	PI	10,054	0.14%	99.84%
Bom Jesus da Lapa	BA	7,491	0.10%	99.94%
Caxias	MA	2,775	0.04%	99.98%
Coelho Neto	MA	1,125	0.02%	99.99%
Imperatriz	MA	596	0.01%	100.00%
Presidente Dutra	MA	106	0.00%	100.00%
Lençóis Maranhenses	MA			
Itapecuru Mirim	MA			
Médio Mearim	MA			
Codó	MA			
Cotegipe	BA			
TOTAL		7.367.884		






TABLE 1

SHARE OF AGRICULTURAL PRODUCTION OF MATOPIBA, 1996-2006


YEAR	GEOGRAPHICAL ENTITY	TOTAL AMOUNT (THOUSAND R\$)
1996	The four states	R\$3.499.026,68
	Matopiba	R\$1.226.405,46
	% of contribution of the Matopiba region to the total value of agricultural production in the four states as a whole in 1996	35,05%
2006	The four states	R\$12.612.638,30
	Matopiba	R\$5.102.407,19
	% of contribution of the Matopiba region to the total value of agricultural production in the four states as a whole in 2006	 40,45%

Table 1^B: Reproduced from Embrapa (2017).

Here the concentration is also significant. The Barreiras microregion, as can be seen in Box 1, accounts for almost 40% of total soybean production. According to the document “Delimitation and territorial characterization of Matopiba,” published in 2017 by Embrapa, the same microregion is responsible for a similar percentage of the total corn production and close to 75% of cotton production. These are the main products of the regional economy.

The contribution of farming to the economy is growing in the four states, and according to figures from the Agricultural Census,³² the Matopiba region accounted for approximately 40% of the total value of production in 2006. As shown in Table 1, this is an increase from 35% in 1996.³³ In 1996 animal production contributed 45% to the total value of agricultural production, compared to 54% for plant production. In 2006 an inversion occurred and plant production rose to 87%, while animal production fell to 12.6%, indicating the growing importance of grain crops.

Although the productivity of soybeans in the region tripled between 1991 and 2011, rising from less than one ton per hectare to three tons,³⁴ recent studies show that the expansion of cultivated area is still a fundamental vector in the growth of production. Between 2000 and 2014, the area planted with soybeans increased from 1 million to 3.4 million hectares, a growth of 253% for the period. All this production is concentrated not only in regional terms, but also with regard to the segments that compose the agrarian structure of Matopiba. Figure 1, shows how the territory is occupied by different classes of properties – large, medium, and small – and the areas set aside for conservation and indigenous lands.

FIGURE 1

MAP WITH RURAL PROPERTIES, INDIGENOUS LANDS, CONSERVATION UNITS AND RURAL SETTLEMENTS IN MATOPIBA, 2017

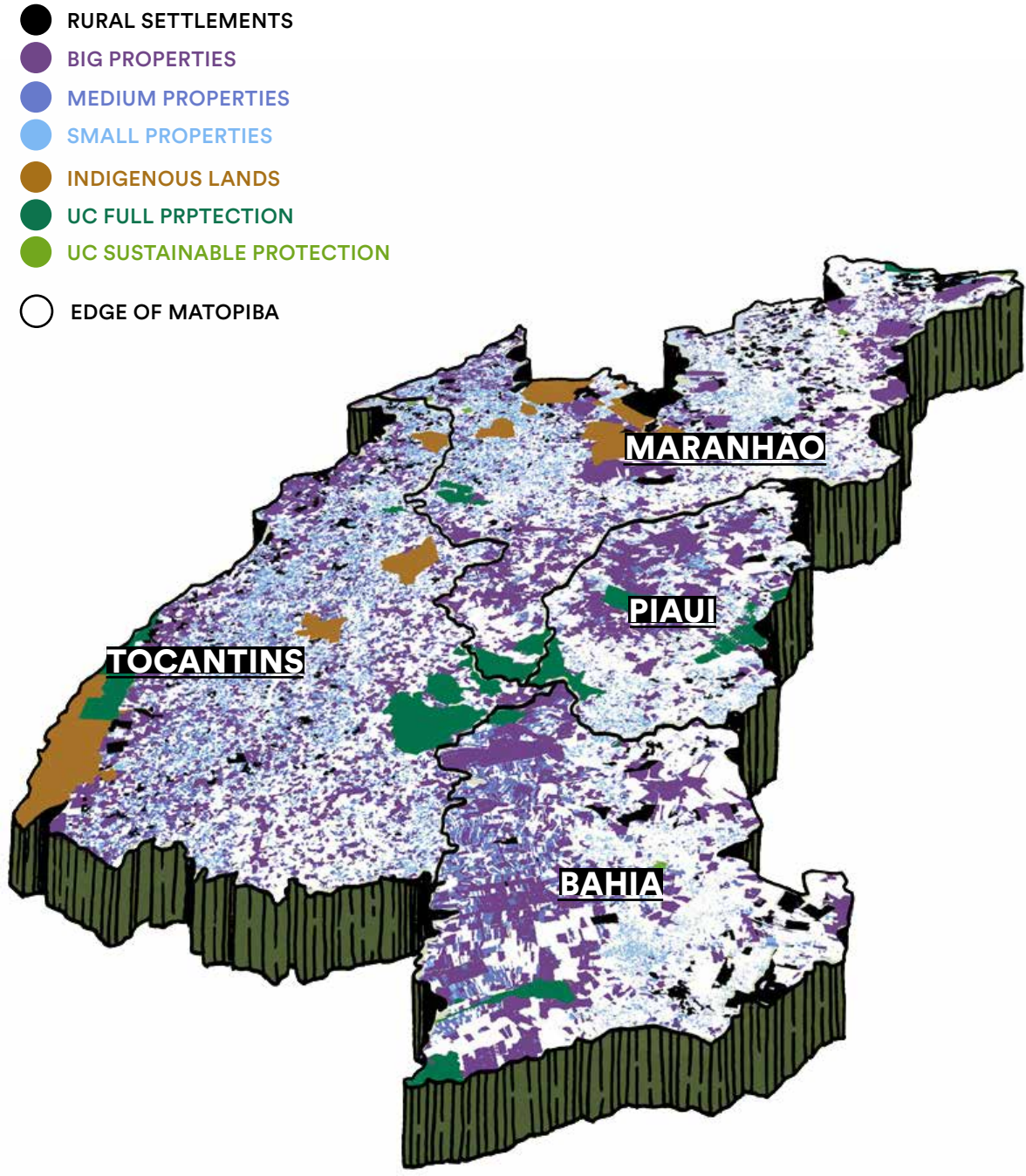


FIGURE 1^c: Developed by Piatto and Inakake (2016), reproduced by Buzato et al. (2018)

Hold the line

According to a study conducted by Embrapa in 2015,³⁵ using data from IBGE, there are 250,238 farm establishments in Matopiba which corresponds to 5.7% of all establishments in Brazil. Of these, 15% are smaller than 100 hectares and the other 85% are larger. These establishments are divided into four classes:

CLASS 1 _ establishments considered **“VERY POOR.”** These represent 80% of the total and generate only 5.22% of the gross revenue of the region. They are present in all 337 municipalities.

CLASS 2 _ establishments recognized as **“POOR.”** These represent 14% of the total and generate 8.35% of the gross revenue of the region. They are present in 330 municipalities;

CLASS 3 _ the intermediary segment, known as the **“MIDDLE CLASS.”** These represent only 5.79% of the total, but generate 26.74% of the gross revenue, and are more concentrated in some microregions.

CLASS 4 _ establishments considered **“WEALTHY CLASS.”** These represent only 0.42% of the establishments – 1,051 producers – but are responsible for 59.78% of the gross revenue of the region. In this class, gross monthly income is 200 times above minimum wage.

The concentration is so brutal that, according to the same source, if it were possible to multiply the level found in class 4, only 1,709 producers would be needed to generate - and obviously appropriate - all the revenue produced in Matopiba. Judging by the competition found in the region today, with rising

costs and the difficulty smaller producers face in continuing to farm, this outcome is not beyond the realm of possibility. What remains to be seen is the impact this might have on the regional economy and on the population.

As for the other types of properties, establishments, and protected areas in the region highlighted in Figure 1, there are 46 conservation units, occupying an area of 8.3 million hectares.³⁶ There are also 35 demarcated indigenous lands in this territory, covering an area of 4.1 million hectares,³⁷ and are 781 agrarian reform settlements and quilombolas, covering another 3 million hectares.³⁸ In total, excluding territorial overlaps, 13.9 million hectares are legally attributed to conservation units, indigenous lands, agrarian settlements, and quilombos. That does not mean all of this area is fully protected, however. It is important to remember that agrarian reform settlements can be found inside Sustainable Use Conservation Units, and that territorial overlaps can occur between these units and indigenous lands, (not to mention the overlap with areas claimed as private property with no restrictions on use). Furthermore, restrictions on Environmental Protection Areas (APAs) are lax, and these areas are often not used for conservation – in fact, this is the case for 98% of the Sustainable Use Conservation Units in the region.

FIGURE 2

MAP OF THE AREAS IRRIGATED BY CENTER-PIVOT IRRIGATION IN MATOPIBA, 2017

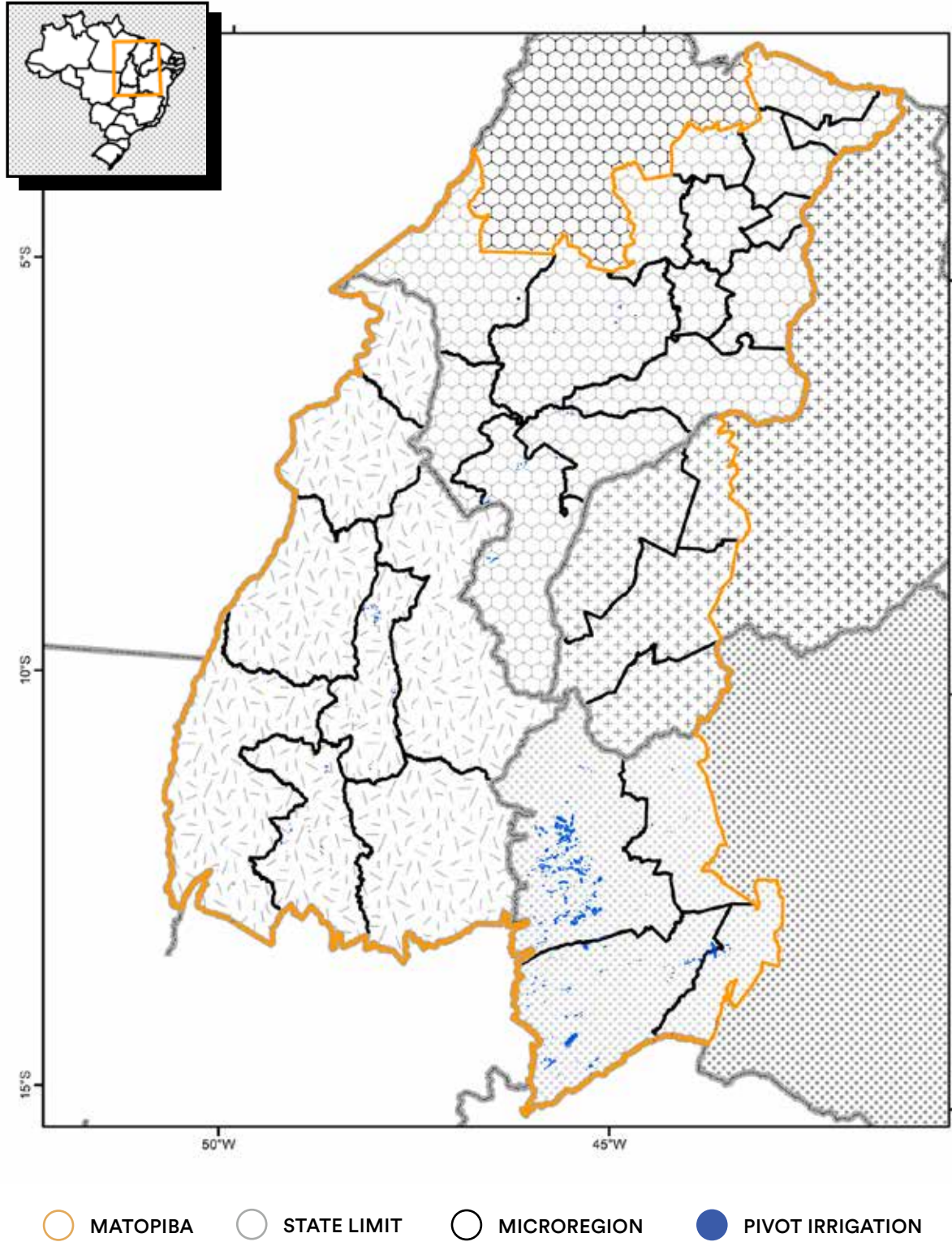


FIGURE 2^D: Reproduced from Embrapa (2017)

Hold the line

Infrastructure in the region remains in a precarious state, which makes it more expensive to transport products and reduces the mobility of local populations. Although main roads are in good condition, almost all of them are one lane, which reduces average speeds and increases the risk of accidents. Secondary roads – and even some of the main ones, including stretches of the Transcerrado and state highways of Tocantins – are almost always dirt roads. Truck traffic is intense, even outside of harvest season.

Following the initial euphoria about the investments announced by the Growth Acceleration Program (PAC) in the previous decade, various projects have either not gotten off the ground or have been implemented at a slower than expected pace. All of them were designed to improve interregional connectivity, with highways, railways, and waterways linking the region to ports where (primarily) soybeans are exported, or to the large capitals of the Brazilian Northeast, in whose metropolitan regions large meatpacking plants, supplied with corn produced in Matopiba, have been built. No investment strategy to increase interregional connectivity appears in official documents, which could directly benefit the local population and contribute to the movement of wealth to the countryside, appears in official documents.

Another bottleneck is the supply of electricity. While the previous decade saw the Light for All Program universalize access to electricity in households, there are still restrictions on the use of the high-voltage networks that are important for processing and irrigation activities. In many areas of Matopiba, this is one of the main complaints voiced by the business community.

Also, irrigation itself is a sensitive topic in Matopiba. In Western Bahia around 87%

of the production areas are irrigated using center-pivot irrigation. 130,000 of the 150,000 hectares of irrigated land in Matopiba are found in this region. In these parts of the territory, production is highly dependent on the use of local water resources. Another 10,000 hectares are in different micro-regions of Tocantins, and the rest in Piauí and Maranhão, as shown in the map in Figure 2 and Box 2.

Areas irrigated by center-pivot irrigation in Matopiba, 2017

Microregion	State	Pivot area (ha)	Cumulative area	Relative %	Cumulative %
BARREIRAS	BA	94,400.91	94,400.91	62.83%	62.83%
SANTA MARIA VITÓRIA	BA	30,963.19	125,364.10	20.61%	83.44%
PORTO NACIONAL	TO	6,211.41	131,575.51	4.13%	87.57%
BOM JESUS DA LAPA	BA	5,421.74	136,997.25	3.61%	91.18%
GERAIS DE BALSAS	MA	3,910.44	140,907.69	2.60%	93.78%
GURUPI	TO	2,873.65	143,781.34	1.91%	95.70%
ALTO MEARIM E GRAJAÚ	MA	1,687.76	145,469.10	1.12%	96.82%
CHAPADA DAS MANGABEIRAS	MA	1,008.60	146,477.69	0.67%	97.49%
RIO FORMOSO	TO	997.79	147,475.48	0.66%	97.49%
COTEGIPE	BA	803.84	148,279.32	0.54%	98.69%
JALAPÃO	TO	586.62	148,865.94	0.39%	99.08%
IMPERATRIZ	MA	307.17	149,173.11	0.20%	99.29%
ITAPECURU MIRIM	MA	211.77	149,384.87	0.14%	99.43%
ALTO MÉDIO GURGUÉIA	PI	203.03	149,587.91	0.14%	99.56%
PORTO FRANCO	MA	198.63	149,786.54	0.13%	99.69%
BERTOLÍNIA	PI	167.76	149,954.31	0.11%	99.81%
CHAPADINHA	MA	110.21	150,064.51	0.07%	99.88%
CAXIAS	MA	96.83	150,161.35	0.06%	99.94%
MIRACEMA DO TOCANTINS	TO	70.90	150,232.24	0.05%	99.99%
BICO DO PAPAGAIO	TO	14.29	150,246.54	0.01%	100.00%

TOTAL

150,043.51


 BAHIA

MARANHÃO

PIAUI

TOCANTINS

Between today and tomorrow: a new phase in territorial formation

The vision of Matopiba as a region marked by a national rural elite that can achieve productivity rates comparable to those achieved by countries with more advanced technology is being replaced by something significantly different. At the end of the second decade of the 21st century, there are other social processes shaping local territories. Four vectors, in particular, should be noted:

1. The local manifestation of the processes of **internationalization and financialization** of the economy;
2. The second concerns **socioenvironmental conflicts** involving traditional populations that are more directly affected by issues around production, land grabbing etc., with the potential of involving broader sectors of local society – especially in the case of conflicts involving water resources;
3. Disputes over the forms of **social regulation of local natural resources**, whether by the government, as is most usual, or by forms of public governance, not necessarily controlled by the government;
4. The **new business strategies** that are beginning to shape this regional transformation.

Of these, the most evident and strongest process so far is that represented by the internationalization and financialization of contemporary capitalism. In 2015, *The New York Times* published a full-page article on an investment fund that receives money from various pension funds in the United States and other countries, such as Switzerland and Canada - TIAA-CREF, cited previously. The article accused the fund of acquiring land from a Brazilian businessman known to engage in fraud and violence in the appropriation of land belonging to family farmers and to sidestep local legislation that limits the presence of foreign investment in the purchase of land. Land investment options listed for this fund total between US\$ 2 and 3 billion and are used to purchase agro-industrial enterprises and land through subsidiary companies in countries such as Brazil, Australia, Poland, Romania, the United States, Chile, and New Zealand. The report produced by civil society organizations that served as the basis for the article also pointed out other violations, such as land speculation, illegal deforestation, and labor exploitation.

Various authors^{39,40} have highlighted that the growing interest by transnational companies in acquiring land as a financial asset as one of the striking features of rural Brazil. A certain disconnection in the price curve for land in relation to the price of the commodities produced there can be observed. After the boom cycle that occurred between 2002 and 2012 caught the interest of investors, demand for land has continued to grow, driving the prices of this asset higher, despite the poor outlook for profitability from production.

Part of this disconnect is sustained by the relatively low cost of establishing farms in the new areas, allied with an outlook for future appreciation that may or may not take place. Graphic 1 illustrates this trend.

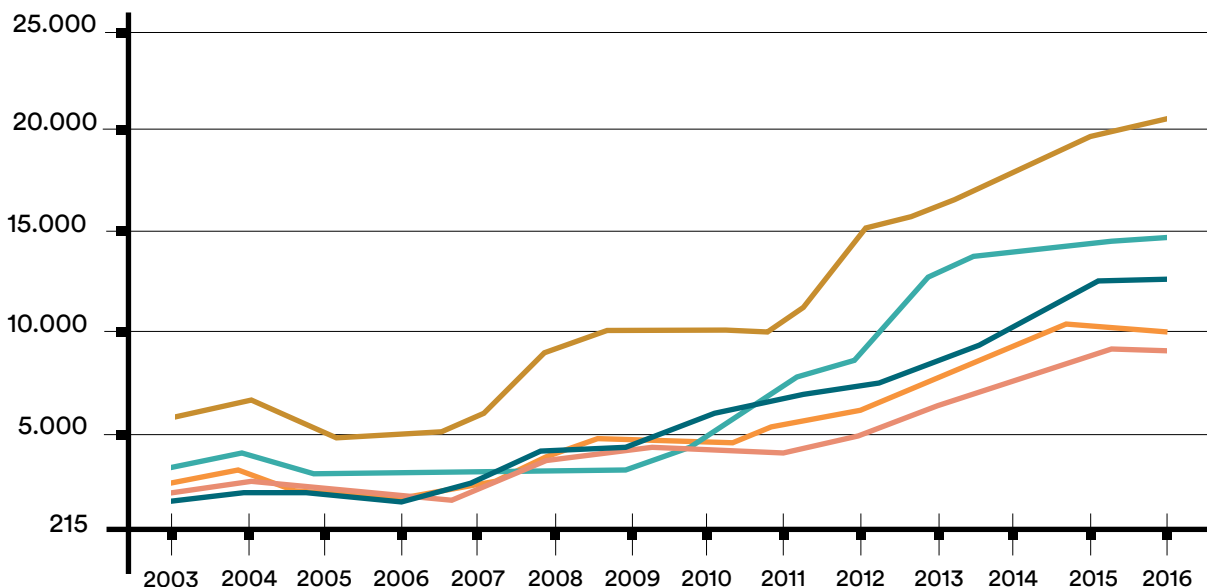
Is there anything new in this process? At least two characteristics make the current situation different⁴¹: **on the one hand, the investment boom in land in different parts of the world, and on the other its association with a multiplicity of financial instruments and agents involved in the transactions. This development push cannot be considered in isolation from**

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the water, energy, and climate crisis and growing concerns about the food security and sovereignty of nations, issues increasingly present on the international agenda. One must also consider the ramifications of the enormous instability provoked by the financial crisis of 2007/2008, with a redirecting of some financial investments toward more secure markets and investments more closely tied to tangible assets.

GRAPH 1

PRICES OF HIGHLY PRODUCTIVE LAND IN MATOPIBA IN BRL PER HECTARE, 2003-2016



■ PEDRO ALONSO / TO ■ BOM JESUS / PI ■ URUÇUI / PI ■ BALSAS / MA ■ LUIS EDUARDO MAGALHÃES / BA

Graph 1f: Reproduced from Pitta et al (2017), originally published by Lima (2014), from Informa Economics/FNP. Prices corrected using IGP-M for April 2015. Update for the years 2015 and 2016 by Tim Steinweg and Hilde van Dijkhorst (AidEnvironment-Holanda)

The growing interest by transnational companies in acquiring land as a financial asset is one of the striking features of rural Brazil.

Data from the World Bank⁴² indicates that, in the years leading up to 2008, the sale of land globally grew by an average of 4 million hectares a year. From 2008 to 2009, the demand exploded and more than 56 million hectares of farmland, 70% of which were concentrated in Africa, were sold. And these figures may be underestimated since governments have loose control over indirect acquisitions that sidestep national legislation. These phenomena therefore exhibit an interdependence with farm commodity prices and, consequently, with land. Current prices reflect more than just the relationship between supply and demand of these products. They also reflect the conditions and costs of shipping, storing and financing; the operation of large companies in processing and commercialization; and also oscillations in the futures markets. Information on risk, return, and uncertainties is fundamental to building investment portfolios that today behave like true mosaics of financial assets. The use of futures and hedging is already commonplace in the sale of farm commodity harvests on a global lev-

#Matopiba

el. This is where the speculative dimension appears. To the extent that it is a production factor, but also a store of value, land creates wealth through a process of passive appreciation that endows it with the characteristics of a productive and financial asset.

If the interdependence of farm crops with other agro-food complex activities is already a reality, a result of the process of modernization of agriculture and the integration of capital, what stands out in recent times is the growing participation of sectors not originally associated with agriculture but increasingly attracted by this appreciation. This is the case with real estate capital, the already cited investment funds, and companies promoting environmental services, to cite just a few.

The consequences are dramatic for traditional populations, for the pillars of food security, and sovereignty of nations, and for the forms of regulation and control over strategic natural resources for local societies and countries. The economic and social impacts of farming activities on the territories where they are located are also relevant. The flows created and sustained by a network of producers, who engage in large-scale farming but still reside in the territory and maintain ties with the population, through commerce and local government, are very different from those created by large conglomerates, whose relation with the production space is based solely on extracting revenue, which does nothing for the local economy. **The result tends to be even further concentration, not only of production, but also of wealth and its social effects.**

Hold the line

Another vector that has been shaping the territorial configuration of Matopiba is the dynamic of conflicts surrounding the forms of appropriation and use of the territory, which must be conveyed in this way, in the plural. There are traditional land conflicts involving traditional communities, land grabbers, and farmers. There are the recent and potentially explosive conflicts surrounding access and use of water. There are conflicts between the elites. Only the first type is commonly addressed in the literature. The other two remain, in general, relatively invisible.

As for the land conflicts, a recent study published by Action Aid⁴³ features a broad panorama of how traditional communities located in this biome are being affected by the expansion of farming. Many of them are represented in the National Campaign in Defense of the Cerrado, which coordinates local, regional, and national organizations around the need for its preservation.

The **National Campaign in Defense of the Cerrado** was born out of the needs of the traditional communities who live there. To raise awareness of the importance of preserving the Cerrado, the objective of the campaign is to highlight the impacts of the large farming and mining operations on the environment and the people who depend on the natural resources of the region for their survival. These communities are presented as guardians of biodiversity and traditional ways of life, and, in turn, of the ecological and cultural heritage of the region. The initiative already encompasses some 50 national and international organizations, social movements, and pastoral entities.

Although these land conflicts were noisier in the past, and the region of Bico do Papagaio in northern Tocantins was for a long time a symbol of the violence associated with the dispute over land, one could still cite examples from the four corners of Matopiba today. Consider the case of Condominium Estrondo in Western Bahia, cited previously, or that of the Forquilha no Piauí community, and the clashes between traditional communities and the owners of farms in Campos Lindos in Tocantins. And let us not forget Maranhão, which takes the top spot for land conflict in the nation, according to a study by the Pastoral Land Commission⁴⁴.

The conflicts surrounding access to water resources have mobilized primarily traditional communities that have been kept from accessing resources that are fundamental for their survival, or have been impacted by reduced water availability or quality.

The National Campaign in Defense of the Cerrado

has the purpose of valuing the biodiversity, cultural heritage, and communities of this biome, and fighting for its conservation.

–
Brazilian law does not assure full protection of the Cerrado. Only 11% of the Cerrado is covered by reserves or Conservation Units, compared to almost 50% of the Amazon.

–
The Campaign was launched in 2016, with the aim of warning society about the impacts that the destruction of the Cerrado caused in Brazil. – The Campaign is promoted by more than 50 organizations, social movements and religious entities, such as the National Conference of Brazilian Bishops (CNBB), and it began its activities in 2016.

–
Water is the motto of the Campaign (Sem Cerrado, Sem Água, Sem Vida), because the Cerrado has a central role in the country's water supply. The biome is known as the "cradle of waters" because it maintains three large aquifers (Guarani, Bambuí and Urucuia) and it is responsible for the formation and feeding of large rivers of the continent, such as São Francisco, Tocantins and Araguaia.

#Matopiba

These resources have become scarce, allegedly from the excessive use of crop irrigation, as denounced in a recent episode that occurred in Correntina,^{45,46} in Western Bahia, in the second half of 2017. **Streams and watercourses are drying up. Many of them may be contaminated with the pesticides used on crops.** In the case of Correntina, part of the local urban population supported the movement of the farmers, since the scarcity and poor quality of the water were already being felt in the city, showing that it is possible for these segments to join traditional communities and environmentalists if the problems continue to grow. The best evidence that this is an explosive theme is the fact that employer associations, such as the Association of Farmers and Irrigators of Bahia (AIBA), have commissioned a study conducted by the University of Nebraska (USA) with resources from a public fund based on tax waivers, Prodeagro, assessing the availability of the Urucuia aquifer, most of which is situated in Bahia and on which their members depend for irrigation.

Finally, it is important to mention the third type of conflict, generally less emphasized in the literature: intra-elite conflicts. This theme is generally neglected, for various reasons. One of them is the tendency of critical analysts to homogenize the behavior of sectors associated with the different segments of big capital. A functionalist and dualist view minimizes the nuances and internal contradictions of the business world due to the fundamental opposition that separates the interests of this social group from those that affect broader society, especially rural workers and traditional communities.

Hold the line

Another reason is the fact that these segments have, up until now, formed a grand coalition, combining their interests and presenting themselves as “the” agribusiness, regardless of whether they include under this umbrella modern producers that adopt sustainable practices (albeit on a limited basis), big landowners, or even land grabbers.

However, the entire process that involves these different agents is not free of contradictions. Here, what’s new is that this intensification may be creating gaps that can be exploited to introduce another narrative on the future of Matopiba. In other words, over recent decades there have been no open conflicts between the production sector and the financial sector or speculators. This is because openings and escape valves were established to manage the friction between them, which ended up endowing less powerful sectors of Brazilian agribusiness with alternatives that would allow them to remain in the game. For example, in the early days of the conservative modernization of Brazilian farming, broad sectors of the business community benefited from easy and cheap credit to promote updated investments in production, allowing them to adopt innovations that had been made in machinery, techniques for production, and inputs. Later, those who were unable to keep up with the modernizing force were compensated through the forgiveness of debts and other subterfuges, and in this way were able to remain in the game as producers even when their inability to compete should have forced them out of the market.

At the same time, less capitalized sectors have used the continued expansion of the farming frontier as an opportunity to acquire cheaper land, while selling land that has appreciated to wealthier sectors in already

structured regions. However, **what would happen if this frontier were closed? Or if the Brazilian government stopped treating the old land-owning sector, which abuses tax breaks to transform the political power that comes from the domination of land into votes used to bargain for economic compensation, as agribusiness?**

As with agrarian conflicts, examples of conflicts between the elites can be found everywhere. For example, government efforts to draft a decree that delimits Matopiba and promotes the expansion of soybeans in the region were suspended when a representative of the Mato Grosso elite, Blairo Maggi, linked with the interests of cattle farmers in Tocantins, replaced his agribusiness colleague, Kátia Abreu, as the head of the Ministry of Agriculture. In negotiations about ways to limit deforestation, cattle farming organizations and even associations like Aprosoja have been less open than other business associations, such as AIBA, for whom the subject is discussable as long as compensation and incentives that cover the producers’ opportunity costs are made available.

The third vector, which combines with internationalization and the ongoing conflicts, is therefore the result of the first two on the institutions that conform to the rules of the game in Matopiba. **It is possible that the current institutional environment will continue, marked by legislation favorable to the financial sector and commodity exports. However, the model based on these sectors is not particularly promising for social inclusion or even for pioneering farmers.** Recent historical experience shows that systems with these characteristics are questioned and redirected sooner or later by democratic governments in response to demands from the public, who generally receive little benefit from the concentrated gains the model produces.

The question is whether the sectors that lose will be capable of forming a coalition that is broad and strong enough to produce another narrative on how to use natural resources and public funds for the promotion of a different model of development. If this occurs, a new direction could be structured around novel governmental modes of operation, with a legal apparatus, a system of incentives, and a system of command and control for the enforcement of laws. Alternatively, it could also be at least partially structured around forms of non-governmental public regulation. The recent case of the Brazilian Amazon shows that between 2003 and 2012, a combination of two forms of regulation were in force: a) governmental, with an increase in inspection and control of deforested areas, and b) private, with initiatives such as the Soybean Moratorium by business groups in dialogue with environmental organizations. Another example of how new institutions can emerge is the initiative advocated by the Agrarian Court of Piauí, which is trying to separate the wheat from the chaff in the conflicts in the southern part of that state through

an interesting, although controversial, program of land regularization. Social movements and even business interests are divided regarding this initiative, in another demonstration of how traditional rifts can mask the contradictions that need to be resolved.

The fourth and last vector involves business strategies for these transformations that are underway in the regional model. Notably, one aspect may have a key impact on demands and adjustments to the three previous factors. Various pressures affect these strategies: the movement toward financialization and internationalization that introduced new players to the markets for land and for producing commodities; the tightening of profit margins resulting from rising production costs and stabilization of the price of soybeans in the period after the recent boom; and the pressure from environmental movements and consumers with regard to the effects of the expansion of farming, against a backdrop of global climate change. An optimistic outcome of these pressures could be, as is already occurring, the internalization of some of these demands through practices that are more eco-friendly – precision agriculture, direct seeding, diversification, and the rotation of crops – and a certain willingness to discuss financial incentives for conservation. Although growing, this trend is still weak.

Another possible outcome, although less optimistic, is the pursuit of cost reduction strategies as a way to survive the tightening competition with large groups. In this direction, in many places a new wave of investments are being considered by already established producers, now aimed at expanding their activities, previously restricted to the plateaus, toward the lowlands. These areas, previously considered less desirable because of the soil conditions and relief and less suitable for mechanization, could be used to raise cattle

in a merging between crops and livestock, or could be adapted for the cultivation of other species. If this occurs, **the potential for conflicts over land and water is enormous, especially because traditional populations and family farms inhabit the lowlands. This is where the rivers that supply a large portion of the states of the northeast and central west regions are situated. The largest remnants of native forest are found in this part of the territory.**

Everything presented above indicates that this is a turning point in the history of the Cerrado of Matopiba. The contours of this new phase, however, will depend on how the coalitions of social actors behave in the new circumstances that emerge. At the center of all the contradictions and strains is a type of distributive conflict: who wins and who loses with the regional model of development in place, and, most importantly, how the gradual changes in direction and morphing of this model will affect these outcomes. The next section is dedicated to a facet of this distributive conflict: the social returns of the economic dynamism being experienced in Matopiba.

The question is whether the sectors that lose will be capable of forming a coalition that is broad and, strong enough, to produce another narrative on how to use natural resources and public funds in the promotion of a different model of development.

THE PLACE

The Municipalities of Matopiba

The 337 municipalities of the region can be divided into four categories:

Rich (45 out of the total)

High production and above-average social indicators. Characterized by the concentration of wealth.

Unjust (67 of the total)

High production and below-average social indicators. Good income does not translate into wellbeing for the population.

Moderate (29 of the total)

Low production and above-average social indicators. There are better welfare conditions here even in the absence of wealth.

Poor (196 of the total)

Low production and below-average social indicators. These are the exact opposite of the rich municipalities.





A

PORTRAIT

OF

SPATIAL



HETEROGENEITY

The municipalities in Matopiba can be broadly divided into four categories

1.

Those in which performance in the production of wealth - measured by GDP per capita - translates into positive socioeconomic indicators for the entire population, measured by per capita income, incidence of extreme poverty, infant mortality, and access to secondary education;

2.

Those in which performance in the production of wealth does not translate into positive socioeconomic indicators;

3.

Those in which both production indicators and social and economic indicators are worse than the state averages;

4.

Those few municipalities that, despite production indicators below the state average, present positive socioeconomic indicators.

The variables selected to divide the municipalities into these four large groups are as follows: for the dimension production of wealth, municipal GDP per capita for 2014 was the value adopted; for the dimension of well-being, a combination of indicators for life expectancy, net rate of secondary school registration for 15 - to 17-year-olds, and the poverty rate were adopted, all based on the 2010 Population Census. Cut-off points were established for the performance of each municipality, situating them above or below the average of the municipalities in the state they belong to. The idea was to avoid the use of national averages that could distort the comparison due to discrepancies in the different circumstances. Instead, the average of the respective states was considered to be a better measure because a large number of municipalities were submitted to a similar set of policies and institutional frameworks. For the dimension of well-being, the performance was considered positive when all of the indicators for this dimension performed above the average found in the other municipalities of the same state. Based on these procedures, the groups were formed in the following manner:

Group A – Rich municipalities

Municipalities with high production and above-average social indicators. Their key characteristic is wealth, albeit concentrated, not to be confused with developed or high quality of life. The performance of all the indicators is above the average found in the other municipalities that serve as a comparison.

Group B – Unjust municipalities

Municipalities with high production and below-average social indicators. They are called this because their wealth does not translate into well-being for the local population.

Group C – Moderate municipalities

Municipalities with low production and above-average social indicators. They are called this because they have relatively high levels of well-being, despite the absence of above-average wealth.

Group D – Poor municipalities

Municipalities with low production and below-average social indicators. These are the exact opposite of the rich municipalities; here, all the indicators present performance below that found in the other municipalities that serve as the basis for comparison.

Box 3 shows the number of municipalities classified under each of the groups described above. Figure 3 shows the spatial distribution in the territory of Matopiba.

Typology of performance of the municipalities of Matopiba in a selected set of indicators for wealth and well-being

Type	MATOPIBA	TOCANTINS	MARANHÃO	PIAUI	BAHIA
A RICH	45	21	19	3	2
B UNJUST	67	27	18	15	7
C MODERATE	29	15	10	1	3
D POOR	196	76	88	14	18
Total municipalities	337	139	135	33	30

Box 3⁶: Created by Favareto et al. (2018).

The box shows that Group A, composed of the rich municipalities and reflecting the idealized image of Matopiba where high production is accompanied by improved well-being, accounts for only 45 of the 337 municipalities. Among the municipalities that present high production, most of them have poor social indicators, thus falling into Group B. There are 67 municipalities in this “unjust” group. The most numerous group is D, comprised of the poor municipalities (in terms of both production and social indicators): this group contains 196 municipalities, almost 2/3 of the total. Finally, there are the exceptions: Group C, the moderate municipalities, of which there are only 29. In these, the social indicators are quite positive, despite the absence of significant production.

The central core of all the contradictions and tensions pointed out is a kind of distributive conflict: who gains and who loses with the model of regional development experienced in Matopiba, and especially with the directions and metamorphoses that are projected gradually

FIGURE 3

A TYPOLOGY OF MATOPIBA MUNICIPALITIES' PERFORMANCE ON A SELECTED SET OF INDICATORS FOR WEALTH AND WELL-BEING

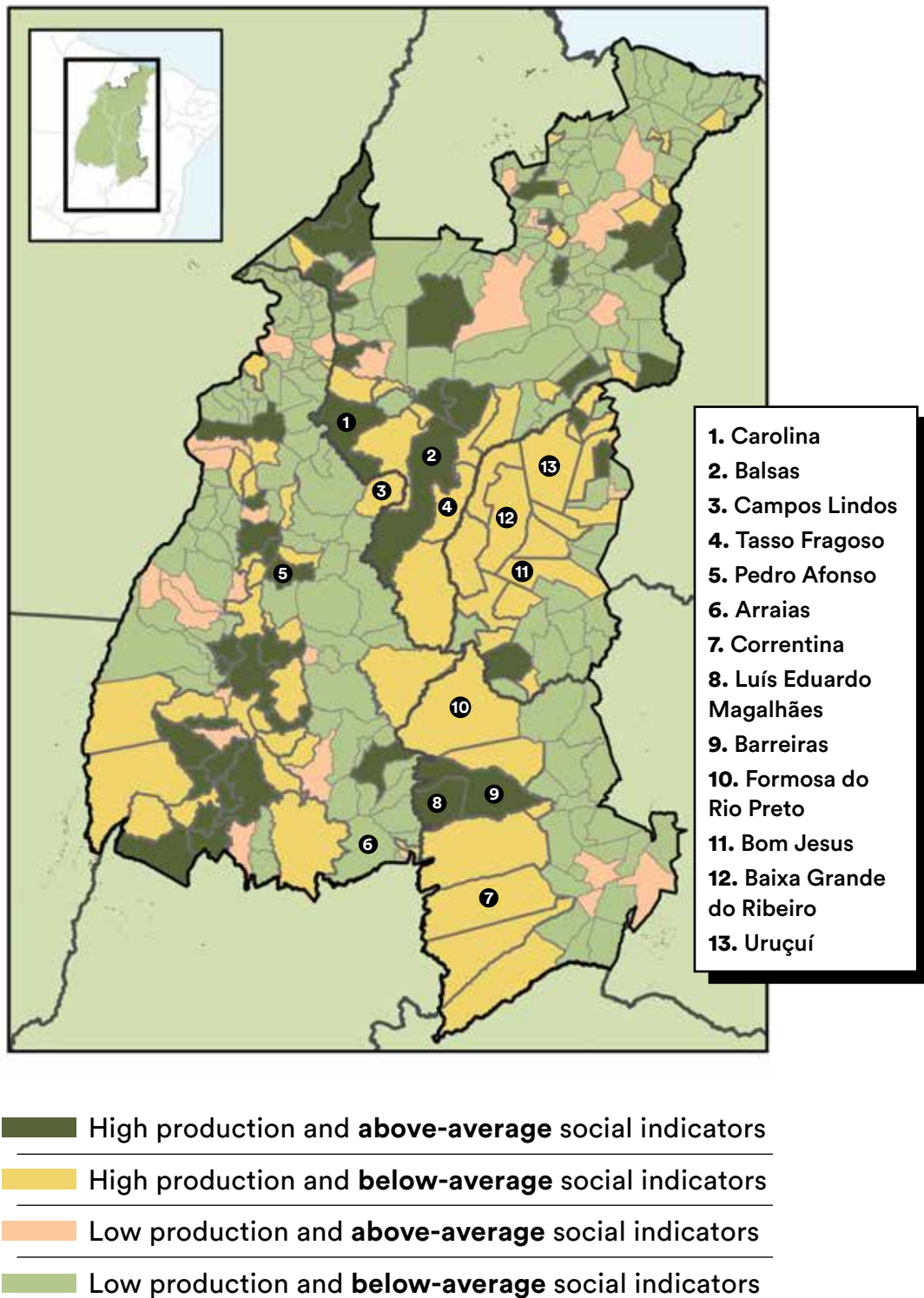


Figure 3⁴: Elaborated by Greenpeace from Favareto et al (2018).

What has happened in the top ten soybean-producing municipalities and their surrounding areas?

The data presented shows that the image the dominant narrative regarding Matopiba tries to portray, unfortunately only corresponds to a small fraction of the municipalities. A possible criticism of this conclusion involves the factor of time. Someone could object to this portrayal by asserting that one must see reality in movement to be able to distinguish what can be attributed to the past and what is shaping the future. In that interpretation, the group of rich municipalities where the indicators of wealth production accompany better social indicators, will soon expand into their surrounding areas where there are unjust municipalities today and where wealth does not result in greater well-being – and eventually, expand even further, into poor municipalities.

In fact the typology was designed to protect itself from this type of criticism by separating the two dimensions into four groups, showing that in the municipalities that already have significant production, performance is not unambiguously linked to well-being. Something, therefore, needs to be explained, beyond the presence or absence of robust soybean production. The missing link is not the factor of time, because some of the municipalities in the unjust group began to produce wealth at the same time as some of those in the group of rich municipalities. The explanation is in

the territorial dynamics, as we intend to demonstrate. The model of consolidation of the social and economic structures blocks the positive effects from spreading from rich centers to surrounding areas.

This idea was already advanced a few pages back, but now we intend to use a qualitative analysis to show this by describing the characteristics of the social fabric of a selected group of municipalities. To do so, we will begin with the top ten soybean producers in Matopiba. Initially, the performance of these municipalities is presented with a selected set of indicators. Next, in more detail, we provide a description of a qualitative study based on visits to 13 municipalities in the four states of Matopiba. Among these 13 are most of the top soybean producers, in addition to others included to allow a contrast between the types of municipalities identified.

According to data published by the Brazilian Confederation of Agriculture and Livestock, in 2016, of the 100 municipalities with the highest soybean production nationwide, 10 were situated in Matopiba: São Desidério (BA), Formosa do Rio Preto (BA), Barreiras (BA), Correntina (BA), Luis Eduardo Magalhães (BA), Rio Real (BA), Jaborandi (BA), Balsas (MA), Tasso Fragoso (MA), and Baixa Grande do Ribeiro (PI). None of them were located in Tocantins.



Municipalities of Bom Jesus da Lapa and Correntina, BA

Photos: Marizilda Cruppe/Greenpeace

Box 4 summarizes the performance of each of these 10 municipalities compared to the average of the states to which they belong across six indicators: production, per capita income, extreme poverty, income inequality, infant mortality, and registration at secondary school for 15 - and 17-year-olds. As the table shows, the only indicator for which the performance of the municipalities is unequivocally higher than the state averages is GDP per capita. However, per capita family income is only higher than the state average in three municipalities, precisely those that serve as regional centers: Luís Eduardo Magalhães, Barreiras, and Balsas. It is no coincidence that the indicator for extreme poverty is also only better than the state average in these same three municipalities. In some of them, poverty levels are shockingly high, affecting almost a third of the population. The indicator of access to secondary education is also only higher in these three municipalities, plus Formosa do Rio Preto. Indicators of income inequality and infant mortality do not present a pattern. The case of income inequality is explained by the fact that in the municipalities that are not regional centers, it is a “low” equality. That is, as income generated does not circulate in the municipality, there are no rich sectors, but this does not necessarily translate into a better standard of living for the poorest. In general, what can be said is that there are two identifiable subgroups: the municipalities that serve as centers, in which good production indicators also translate into better social indicators, and the rest, in which almost none of the wealth produced is translated into better standards of living.

The ten municipalities with the highest production indicators for soybeans of Matopiba

and their performance on in selected socioeconomic indicators

	Municipality	GDP per capita (thousand R\$)	Per capita income (R\$)	Extreme poverty (% of total population)	Income inequality (Gini Index)	Infant mortality (number of deaths in the 1st year of life per 1,000 live births)	Secondary education (% of population of 15 - to 17-year-olds)
BA	SÃO DESIDÉRIO	61.4	302	25.7%	0.57	28.9	25.1
	FORMOSA DO RIO PRETO	47	287	30.2%	0.60	25	41.1
	LUÍS EDUARDO MAGALHÃES	46	871	2.9%	0.62	15.5	35.8
	CORRENTINA	33.1	285	30.5%	0.58	20.4	25.6
	JABORANDI	31.7	281	33.4%	0.62	20.5	31
	RIO REAL	17.9	274	20.4%	0.53	31.4	28.2
	BARREIRAS	9	602	5.5%	0.56	18.1	43.1
	AVERAGE	13.5	496	13.7%	0.62	21.7	32.6
MA	TASSO FRAGOSO	88.4	264	27.4%	0.58	24.5	31.2
	BALSAS	28.2	531	8.5%	0.58	19.5	42
	AVERAGE	9.9	360	22,4%	0.62	28	38.1
PI	BG DO RIBEIRO	27	225	30.2%	0.56	27.6	20.3
	AVERAGE	9,8	416	18.7%	0.61	23	37.8

Note: For the table above, the most recent municipal data available was used. The reference year varies for each indicator due to different databases consulted in order to obtain the most up-to-date values. Data on education, health, and GDP is from 2014. The other data comes from the 2010 Population Census.

BAHIA MARANHÃO PIAUI

Box 4: Created by Favareto et al. (2018) From IBGE database (2017).

Of the rich municipalities which compose Group A, the following from among the top 10 soybean producers in Matopiba, were analyzed: Luís Eduardo Magalhães (LEM) and Barreiras, in Bahia (these were analyzed together because of the historical relationship between the two, and their economic difference comparing to the rest of Western Bahia. and their polarization of Western Bahia), and Balsas, in Southern Maranhão (which polarizes that entire region). Two other municipalities that are not among the largest producers were also included in the analysis. Pedro Afonso in Tocantins was chosen because it belongs to the group of rich municipalities and there were none from that state among the top soybean producers in Matopiba. Carolina, in Maranhão was selected because it contrasts with the others in almost all dimensions: it has good social and economic indicators without being a top soybean producer, and native vegetation in the municipality has also recovered recently.

Of the unjust municipalities, which compose Group B that are among the top 10+ soybean producers of Matopiba: Uruçuí and Bom Jesus, which dispute the polarization of Southern Piauí; Baixa Grande do Ribeiro, also in Piauí; Correntina and Formosa do Rio Preto, in Bahia and Tasso Fragoso, in Maranhão. Although they are not top soybean producers in the region, Mateiros and Campos Lindos in Tocantins, were also included because they excel at production in that state.

Of the moderate municipalities, no exemplary case was included, since these represent the exceptions in their respective regions. On the other hand, of **the poor municipalities** which compose Group D, with the poor municipalities in which wealth is low and social indicators are poor, one case was included: Arraias, in Tocantins, to serve as a counterpoint to the others.

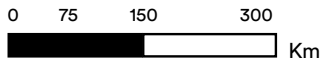
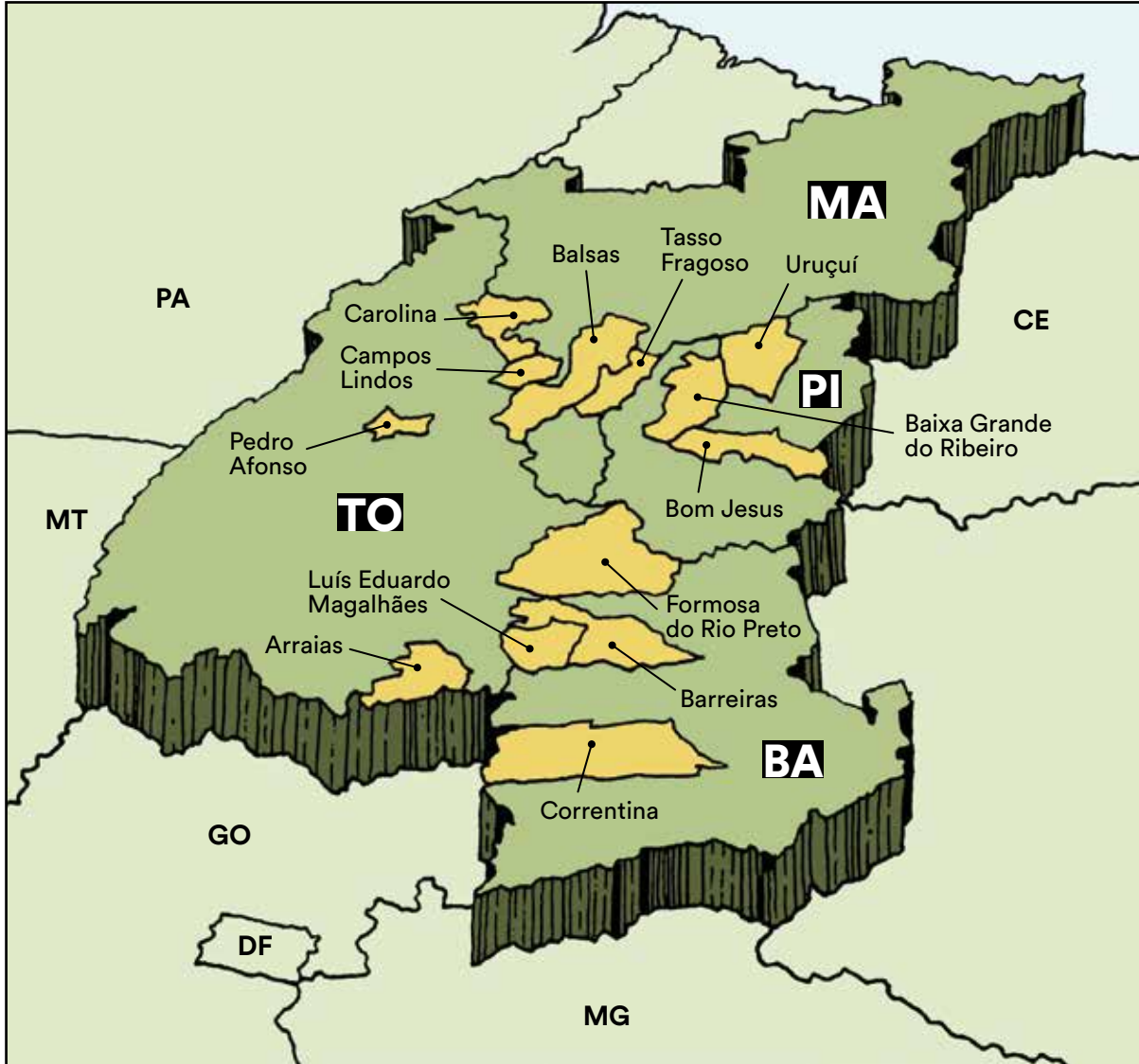
Finally, three of the municipalities in this table were not visited during the field study: São Desidério, Jaborandi, and Rio Real. The latter was excluded because it doesn't formally belong to Matopiba, and the other two to avoid too high a concentration of municipalities in Bahia.

Figure 4 shows the locations of these municipalities in their respective states and in Matopiba. As shown in the map, these municipalities are at the heart of the region, and this is why they can be taken as the most mature and advanced manifestation of the social processes occurring there. The description of each of them is designed to provide color and texture to the statistical data already provided: **the shape of an expanding farming frontier with contradictory effects, in which the relations between society and nature continue to morph, giving rise to a remarkably dynamic, though brutally unequal pattern of territorial development.**

FIGURE 4

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MAP OF THE LOCATION OF THE MUNICIPALITIES ANALYZED, MATOPIBA



MATOPIBA MUNICIPALITIES ANALYZED



Figure 4: Elaborated by Greenpeace from IBGE database (2017)

Hold the line

THE PLAYERS

Business

The so-called “heroic entrepreneur” stands as the main agent for the modernization of Matopiba.

Traditional communities

On the defensive, they fail to propose a narrative of their own about the regulation of the sector.

Municipal governments

Restricted to verbal condemnation, in general they leave the effective measures to the state governments.

State governments

Pragmatic, they see in agribusiness a source of wealth. They try to manage conflicts when pressed. Some outline payment programs for environmental services.

Environmental organizations

They prioritize environmental aspects in relation to the socioeconomic aspects of the regional development model.





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THE STUDY

After traveling through the 13 municipalities situated in the top soybean producing regions in Matopiba, what is our conclusion? The general sense is that it confirms the image that has been shaped in previous chapter sections: one of a frontier in flux, an unfinished, multifaceted process that is undeniably transforming the landscape sections: one of materializing the great archetypes of regional formation: the *gauchos*, originally from Rio Grande do Sul the *geraizeiros*, inhabitants of the Cerrado, and their variants. But not only them – and this is where the portrait becomes more complex. Today, the local population is more segmented. The two original types of characters have morphed and a complex array of interests have imposed themselves on the analysis of the contradictions of territorial development. The fundamental contradiction lies in **the fact that the same mechanisms that are responsible for the expansion of wealth and for the increasing complexity of the social and economic fabric, are also those that limit their effects on local society.**

It is clear after the visit to the municipalities of Matopiba that LEM/Barreiras could only have the contours that it has because of the relationship established with Formosa do Rio Preto: landowners use the wealth produced in Formosa to support their ways of life in LEM/Barreiras, leaving little to dynamize the economy where the farms are located. Of course, there is the production of LEM/Barreiras. However, an effect of agglomeration of individuals and wealth in these two municipalities is necessary: the required supply of goods and services that cannot be made available where this concentration does not exist. It is not, therefore, a matter of time before the wealth overflows into the surrounding area. It is actually a structural and congenital aspect of the style of territorial development, where wealth is produced in a very concentrated manner and, for this reason, the economy is specialized.

The same type of reasoning is valid for the relationship between Uruçuí and Bom Jesus, on the one hand and Baixa Grande do Ribeiro, on the other, and for the relationship between Balsas and Tasso Fragoso. The reasons that lead part of the population to endorse this model of territorial development are also evident: the answer is in the flagrant contrast with the much worse conditions before the expansion of agribusiness. Yet it is clear that this contrast is skewed because in tandem with the economic dynamism experienced, there was a significant expansion of social programs that diluted the negative effects.

Only the future will tell to what extent this dynamic will continue to exist. Finally, it is necessary to underline the character of the movement of the cerrado frontier. In many spaces lush vegetation is still present, standing in the way of the advancing farms. The ways of life still appear, if not frozen in time, to at least preserve features of another time. Not everything is devastation and extreme mercantilization of social relations and daily life. The ramifications of this dialectic remain to be seen. In this regard, what stands out most is the low degree of reflection of the region on itself. Few social agents know or recognize what is happening there, beyond the dynamics of the soybean industry. To use an expression that is in fashion: there is a very low degree of territorial intelligence in the sense of noting and reflecting on the depth and the direction of this territorial transformation. The next section is therefore dedicated to the vision of the players regarding the future of Matopiba.

The heroic entrepreneurship of the business community

There are common features in the discourse by the business community, which tries to present itself as something homogeneous: the productive sector or agribusiness. The main element of the business narrative is the affirmation of a heroic entrepreneurship, establishing itself as the main agent of modernization in Matopiba. The government's role as investor or regulator during the period that led to the modernization of Brazilian farming is scarcely remembered. When recalled, the government is associated with failure and inefficiency in providing suitable infrastructure, in defending the interests of the country and the international market, or in ensuring an environment of macroeconomic stability and legal certainty for the sector.

With regard to the criticisms leveled at the **socioenvironmental effects of the farming model**, the response comes in unison: the industry follows the law. This is the case for deforestation, use of pesticides, labor laws, and any other aspect. Obviously there are glaring situations in which this does not occur, but these are treated by industry associations as increasingly rare exceptions. With regard to the well-known problems of land fraud, the argument is simple: the current producer is not responsible for the errors of others. That is, whoever paid for the land today is not responsible for the documentation presented in the preceding chain of ownership. If there was land grabbing, let the land grabbers be punished. Businessmen today have no interest in dealing with legal impasses.

Episodes such as the clashes over environmental licensing procedures in Bahia or adoption of land regularization programs such as the one employed in Piauí have revealed that legal certainty is a highly sensitive

Agents and narratives on the future of Matopiba

This final section presents a summary of the main narratives promoted by representatives of the principal social forces regarding Matopiba. Initially, the visions of the two antagonistic segments – the business community and the traditional communities – are presented, both through their leaders. Next, the narratives put forth by the government are outlined, both on municipal and state levels. Finally, some aspects frequently heard in the discourses of environmental organizations are presented, aimed at swaying decision – making regarding the use of natural resources and, therefore, the region's economic model. There are two objectives in this part of the text: to present the narratives that are forming about the future, and to highlight the contradictions and the plurality of approaches that can be found in each of these large groups. It is in this plurality that the basis for a coalition that can put this territory on the path to greater well-being and sustainability can be found.



**Soybean plantation next to
the edge of remaining forest.**
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topic for part of the business community, capable of changing behaviors and complains by the sector.

The extension of the Soy Moratorium to the Cerrado, one of the proposals advocated by environmental movements to stop deforestation in the biome, is roundly rejected by the business community. There are various arguments. First, the need to contain deforestation is questioned, since there is no agreement with the rhetoric on global climate change: changes that are seen are deemed to be cyclical and not influenced by human activity. If there is no causal relationship, there is no reason to change anything in the patterns of use of natural resources. Second, proposals such as zero deforestation and the Soy Moratorium are held to be the result of a manipulation of opinion by international organizations serving the interests of international producers, who see in actions like these an opportunity to contain the growth of Brazilian competitiveness in the global supply of grains and meats. Third, it is argued that legislation already exists and any regulation has to come from law and not from pressure that results in additional restrictions to the industry. Fourth, there is the argument that the sector is already doing its part by adopting conservation practices such as direct seeding, crop rotation, and crop-livestock integration. Lastly, some also point to an additional controversial argument: that the deforested areas already degraded - an alternative proposed to ensure that Soy Moratorium and Zero Deforestation do not result in losses of productive potential - which would not be appropriate for conversion into cropland, either as a result of the quality of the soils or because the relief is unsuitable for mechanization, which would result in effectively limiting the expansion of the sector.

The aspects mentioned above are present, to a greater or lesser degree, in the discourses of almost all the business organizations. Behaving as if it were a single sector is, in the words of one of its leaders, a way of showing its political weight. As everyone knows, this political weight has been used to exert pressure on the three powers in Brazil, in a way that translates the demands of the sector into laws and measures. These are important entities, of which the Frente Parlamentar Agropecuária, popularly known as the Rural Caucus, is probably the best example.

In the last few years, various requests⁴⁷ have been approved. This is the case with the reform of the Brazilian Forest Code, which lifted restrictions and provided amnesty for those who had illegally deforested above the limit permitted by the previous legal framework. The Provisional Measure issued by President Michel Temer during the first month of his administration is a similar case, resulting in a reduction of up to 95% of the outstanding debt owed by rural producers to public institutions. Another example is the reason behind the naming of a representative of the Rural Caucus to the Ministry of Justice, which operates the National Indian Foundation (FUNAI), with whom there are various explosive conflicts involving rural producers. Among the negotiations underway is a proposal by the Rural Caucus to reduce Social Security contributions to 1.2% of agricultural revenue and forgive debts with the Rural Workers' Assistance Fund (Funrural). For labor reform, leaders of the sector proposed the adoption of legislation that would allow 18 days of uninterrupted work, and the possibility that up to 45% of wages can be exchanged for food and lodging, which in practice reestablishes modes of servitude from centuries past. Finally, legislation is being loosened to allow the purchase of land by foreigners, and proposals are being made to change legislation regarding the demarcation of indigenous lands and conservation units.

The suspension or dismantling of specific programs for family farming is also key. As you can see, **behind the apparent discourse of modernization, the agenda of the industry continues to be marked by old and unabashed patrimonialism.**

On the other hand, there is great heterogeneity in the business sector, despite what is commonly expressed and even put forth in some of the specialized literature. This is illustrated by conflicts between regional elites. For example, the change in the administration with the rise of Michel Temer led to a suspension of government initiatives in Matopiba, which had come to prominence under the management of Kátia Abreu as Minister of Agriculture during the Dilma Rousseff administration. Why? The response, provided by a researcher who knows a great deal about business behavior in the Cerrado, is that it was another move in this dispute between groups with different regional expression. Although the Ministry of Agriculture has always been controlled by so-called agribusiness, the group at the head of the portfolio under the Temer administration is associated with Blairo Maggi, former governor of Mato Grosso and one of Brazil's biggest soybean farmers. Although he also has land in Matopiba, the minister is linked with the "Mato Grosso group," which has always distinguished itself from producers of Western Bahia. The group is seen as more arrogant, perhaps because of their discourse founded on a pioneering and entrepreneurial spirit, in supposed independence from the state and governments; and from the group most associated with Tocantins, whose interests are generally associated with livestock farming. Further evidence of the regional differences can be found in the fact that there is little dialogue between the foundations supporting research linked to agribusiness in the different regions and states.

Another expression of the heterogeneity is found within each subspace inside of Matopiba. Beginning with the upper levels of the territorial hierarchy, in more than one state and from more than one administrator we heard the phrase "dealing with cattle farmers and dealing with soybean farmers is completely different." In the words of a state secretary, "When the soybean farmer makes a request it is not for him, it is to increase the competitiveness of his sector: improvements to highways, extension of an electrical grid. The cattle farmer asks for things to offset his lack of competitiveness: he wants the government to buy his milk as it does from the family farmer because he cannot get a better price on the market; he wants favoritism."

Finally, there is a third difference that has to do with greater or lesser openness to new ideas. If the predominant position of agribusiness is contrary to themes such as the Soy Moratorium, a willingness is seen by some of its leaders to discuss how the moratorium could be achieved. Obviously, it is not a matter of adoption on principle. The possibility of discussing this measure appears only on the condition of adopting financial incentives that compensate the opportunity cost of the businessman – that is, how much he can get for not deforesting a certain area. This position is one of business pragmatism, and not purely ideological conservatism.

In the scope of the municipalities or of each producing region inside of each state, there are also at least two divisions. One has at its center the traditional gauchos, who represent the ideal of the pioneers who brought soybeans to the region. Those who arrived, often building their own infrastructure, sought to establish some type of link with the territory. At the center of the other are the large traders, companies like Bunge and Cargill, center of the other large corporations like SLC, Radar, and Estrondo. Where is the opposition? **There has been a significant concentration of land ownership in the sector**, which will probably be revealed in the Agricultural Census. This should have been published in 2015/2016 and was expected in 2018. With the growth of production costs associated with the stagnation or fall in prices of commodities on the international market, profit margins for farmers are under pressure. The large companies have more flexibility to withstand this pressure due to their scale and the synergies of the production chains under their control. The farmer that has only a few hundred or even a few thousand acres has found it difficult to compete. **The gains of other companies are associated, above all, with the appreciation of land: these companies earn primarily through property and not production as such.** This conflict is not more explicit today because the past decade was marked by the commodity boom, and because the frontier is still expanding, pushing less competitive farmers to migrate to areas further afield where they purchase larger areas of cheaper land and try to remain in the market. There is an important detail in the mentality and in the narrative of the pioneering frontier. Curiously, this spatial displacement is not seen as a symptom of fragility in the face of larger or more competitive producers, but as another manifestation of entrepreneurial heroism. A producer in Western Bahia talking about the

movement of the frontiers said with a smile that – no one can keep a gaucho down – when there is no more land there “he’ll go to Maranhão, to Pará, or wherever, only stopping when he gets to the sea.”

Finally, still at the level of each municipality or producing region within Matopiba, there is a divide between different actors: the persistence of an old patrimonialist segment, less present than it once was, that continues to live off the rising land prices; the most traditional producers that produce according to their level of technology; and those that strive to invest heavily in innovation, in some cases internalizing environmental variables. In the first case, although the figure of the great land grabber who operates violently is no longer the trend, it would be naïve to say that these problems no longer exist. In this report we have described **typical practices of pure banditry occurring side-by-side with the most modern farms. With the producers already considering turning their attention to occupy the lowlands, once the plateau areas are exhausted, there is the risk that these practices will take on greater proportions.** This concern was voiced by more than one person who occupies an important position in local government. Such behavior, however, tarnishes the image of the sector in the eye of the public, and there are at the other extreme, a group of leaders and even some organizations in the sector that are going in the opposite direction. This is the case, for example, with the Research Support Foundation for the North Export Corridor (FAPCEN) in Maranhão, which works to inform producers of the advantages of adopting certain socioenvironmental protocols that serve as protection

against restrictions, such as the certification of soybeans on the international market. Most of the producers are situated between these two extremes, engaging in business according to prevailing standards but capable of shifting more to one side or the other of this spectrum.

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In many spaces lush vegetation is still present, standing in the way of the advancing farms. The ways of life still appear, if not frozen in time, to at least preserve features of another time. Not everything is devastation and extreme mercantilization of social relations and daily life. The ramifications of this dialectic remain to be seen.

Traditional communities and the tortuous fight for the right to land and water

Traditional communities continue to be the most visible element in the opposition to the prevailing farming model in Matopiba. Two types of conflict lead to this higher visibility: typical land conflicts, and the growing conflicts involving water access and quality. This visibility is achieved, above all, through the presence of mediators with high social capacity, which make the complaints of these local groups resonate, in general relatively few in number. When it comes to the issue of water, however, more people are involved because it directly affects the populations that live in the urban centers in the municipalities of the region, as demonstrated by the episode in Correntina mentioned earlier.

The tone of this narrative by the traditional communities and their organizations appears to be predominantly or exclusively defensive: defending rights, access to water, permanence on land, ways of traditional life. In many cases there is no alternative narrative regarding the functioning of the farming sector, how the natural resources of the region are used, or what the alternative to the prevailing economic model in Matopiba might be. What's worse is that: many leaders admit that this fight is just a resistance, with no chance of success in the medium or long term.

Hold the line

There are also differences here, similar to what happens in the business sector. On the front line, with the highest visibility, are the organizations associated with the Catholic left, particularly two of historic importance in agrarian conflicts in Brazil: the Catholic Indigenous Missionary Council (CIMI) and Pastoral Land Commission (CPT). A second line involves a branch of more combative rural unionism, which over time has developed close ties, if not a symbiosis, with the work of the CPT. Finally, there is a third branch of more pragmatic rural unionism that tends to operate locally in conflicts, focusing on negotiation instead of mobilization or confrontation. Strong coordination with traditional communities and rural workers is noted in the first two. In the four states visited, the work of the CPT is strong and present. The organization has become a point of reference in the assisting and addressing of land conflicts between workers/community members and large owners/companies. However, it is of the utmost importance to emphasize, again, the problem of water, which has worsened in Western Bahia and in the region of the Island of Bananal, in Tocantins. In the municipality of Correntina, which recently experienced intense conflict, the work of the CPT has been conducted in conjunction with the Movement of People Affected by Dams (MAB). The social movements in the region, also integrating the Union of Rural Workers (STR), has acted in a cohesive manner by questioning government agencies responsible for granting water use rights, and by using confrontation as a response to the scarcity

of water in parts of the rural and traditional communities that live along the banks of the Arrojado River. The CIMI is more present in Maranhão and Tocantins. In both states, the organization works together with the CPT in channeling the conflicts and protecting indigenous interests.

Municipal governments

In this clash of views the municipal governments have predominantly behaved in a pragmatic manner. They condemn the excesses of the business sector in certain cases, as in the agrarian conflict of Formosa do Rio Preto or with regard to water in Correntina, but without acting in an open and confrontational manner against the business sector. There is verbal condemnation, but this does not translate into effective measures, which are generally left to the state government or judiciary (as can be seen in the two cases mentioned above).

What draws our attention is the fact that the municipal government is not needed by the large landowners, who do not tend to live in the municipality. In fact, agribusiness in Matopiba generally does not really need municipal government. It is as if these companies have formed an external territory to the municipal territory, a type of enclave. Perhaps there, and only there, would the expression “territories of capital” be valid, according to some exponents of the literature dedicated to agrarian themes. In many cases, what happens is the exact opposite: municipal governments ask for assistance from the business sector for some of their activities, such as the donation of fuel, lending of machinery, and sponsorship of events. Obviously, this is not a stance shared only by the administrators: it reflects the conflictive ambiguity felt by the entire local population.

The fact that the government simply does not know who owns the land and how ownership is changing is equally relevant. The mention of the presence of international groups by public administrators is completely speculative in all of the cases observed.

The municipal governments are unanimous in affirming that what little wealth is produced remains in the municipality. As a result of the Kandir Law, municipalities are only partially compensated for the taxes they do not collect because these products are intended for export. Even so, some emphasize the importance of what little they collect in benefiting the local population: as with the wage floor for teachers or programs for family farming in Correntina.

Kandir Law

Complementary Law 87/1996, known as the Kandir Law, exempts primary and semi-processed industrialized products intended for export, such as soybeans, from the Tax on Circulation of Goods and Services (ICMS).

However, with the objective of increasing the competitiveness of the large producers of commodities, the measure brought with it an effect of profound deindustrialization, with the prioritization of exports and the loss of tax revenue for the states of approximately R\$ 22 billion to date.

State governments

The discourse of state administrators, similar to municipal governments, is one of absolute pragmatism. **Agribusiness in Matopiba is responsible for a large part of the gross product of the state, and as such, accumulates political and economic power to decisively influence state governments. This creates a divide in governmental agencies.** The secretariats of agriculture and even planning - partial exception for the case of Piauí - tend to see their areas in the region of Matopiba as a place for production. In this sense, strategies and policies are designed to improve the competitiveness of the farming sector with investments in infrastructure, adjustments to legislation in order to reduce business transaction costs. Rural development secretariats and social secretariats tend to see the same region as a place for living. In this case, the strategies and investments involve land regularization, social policies, policies and programs for family farming. Most of the resources and political priorities are shifted toward the first group highlighted.

It is curious to observe that even in the case of progressive governments, there are no consistent initiatives to forge another style of territorial development. It is not a matter of reversing the presence of agribusiness or denying the vocation that has formed in these regions for the production of grains. But rather to think of a way the areas that are on the frontier of this expansion could make room for other ways of inserting the populations that exist there, with sustainable use of the forest, among other possibilities. Here again a relative exception is the case of Piauí, which has announced a strategy in the mold of Agenda 2030 and Sustainable

#Matopiba

Development Objectives to try to anticipate the movement of the frontier and try to prevent some of the problems associated. In the case of the other states, most importantly Bahia and Tocantins, there are mentions of initiatives regarding payment of environmental services and other monetary incentives for conservation are being planned, albeit timidly.

Environmental organizations

In recent years, attention has increasingly turned to the Cerrado. This may result in more consistent and coherent action in this biome, previously seen as secondary compared to others with greater appeal, such as the Amazon or the Atlantic Forest.

The narratives that emerge emphasize, above all, the environmental aspects of the production model that continues to encourage deforestation. One of the best examples is the case of the Cerrado Work Group (GT-C), which is trying to replicate, in this biome, the results achieved in the Amazon and with other initiatives like the Soybe Moratorium. *Alterar para:* Many of the most important business, environmental and consumer organizations have participated in this initiative. GT-C has been working on three themes: legislation, incentives, and territorial intelligence. Everything points to the theme of incentives being the most seductive for the business sector, while NGOs pin their hopes on territorial intelligence, which will make it possible to generate more and better information capable of mobilizing the market by inducing better practices in the soybean chain.

Hold the line

But even in initiatives like these, there is no similar emphasis on socioeconomic aspects of the regional development model. That is, even if some type of agreement can be reached, such as a moratorium on deforestation of the Cerrado, there is nothing on the table that signals concrete and consistent alternatives capable of generating economic dynamism or inclusion of the poorest in production. In part, it is precisely this that leads a significant part of the local population to view the expansion of soybean production as a necessary evil.

FOR THE PROTECTION OF THE CERRADO

Over the last five years (2013 – 2017), the Cerrado has lost an area equivalent to 33 times the size of São Paulo. At this rate of destruction, the Cerrado has become one of the most threatened ecosystems on the planet – primarily because of the expansion of agribusiness into areas of native vegetation. Faced with this grave situation, in September 2017 a group of over 60 civil society organizations published the manifesto “In the hands of the market, the future of the Cerrado: deforestation must be stopped,” calling for immediate action by the companies that purchase soybeans and cattle from the biome, as well as investors who operate in these sectors, to eliminate deforestation from their production chains. The market can impede the destruction of over 30% of the Cerrado, which shelters the headwaters of eight of Brazil’s 12 hydrographic regions. Over 100 companies, including retailers, feed manufacturers, global food brands, and investors, have already declared support for the objectives of the manifesto. Although the focus of the manifesto is on the private sector, civil society also demands effective action by the government, such as the creation of protected areas and land rights for indigenous peoples, traditional communities, and small farmers of the region.

CONCLUSIONS

The original hypothesis of the study was based on three affirmations:

A. It is not the entrepreneurial effort of the gauchos farmers that modernized farming in Matopiba, but rather a project directly undertaken by the Brazilian government;

B. The socioeconomic impacts of this activity are far from homogeneous, and require a closer look at intra-territorial spatial differences;

C. The undeniable increase in production and productivity is concentrated, increasing social inequalities, despite a relative decrease in poverty.

Coconut shellers in a Babaçal used by traditional communities, in the region of Coquelândia, Maranhão.

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CONCLUSIONS

As pointed out in the introduction to this report, the main objective of the study was to analyze the socioeconomic impacts of the expansion of farming into the cerrados situated in the states of Tocantins, Bahia, Maranhão and Piauí, also known as Matopiba. More than just describing the effect of the processes of territorial development on the selected social and economic indicators, the overriding objective was to gather evidence that would allow us to question the dominant discourse in the region, according to which the entrepreneurial efforts of Brazilian agribusiness have transformed the region into an oasis of high productivity with beneficial effects for the broader public. This would make certain environmental costs, such as deforestation, something acceptable, a cost for progress. Another objective was to contribute to consolidating a critical narrative to this discourse, showing the contradictions and the complexity of local reality.

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B. The socioeconomic impacts of this activity are far from homogeneous, and require a closer look at intra-territorial spatial differences;

C. The undeniable increase in production and productivity is concentrated, increasing social inequalities despite a relative decrease in poverty.

The conclusions found are presented below by topic. They confirm the general sense of the study's original hypothesis, with some adjustments, and other fundamental amendments.

A. Matopiba as a creation of the enterprising and patrimonial state

The first, almost obvious conclusion is a confirmation that **the dynamic in cannot be understood without recalling the actions of the Brazilian state in the creation of patterns of capitalist accumulation typical of modern commodity agriculture.** The state acted directly in the creation of conditions for competitiveness in the sector through at least three vectors of intervention:

I. The production of technological innovations, particularly through state farming research, via Embrapa, which led to the adaptation of soybeans to low latitudes and climatic conditions such as those found in the cerrados. Until the mid-1970s, soybeans could only be cultivated between Rio Grande do Sul and Paraná.

II. The organization of a national system of technical assistance and rural extension, which was responsible for the free and public dissemination of these new technologies among rural producers.

III. The formation of a national system for rural credit that financed, in a subsidized manner, the acquisition of land and the adoption of technological packets based on the use of machinery, industrial seeds, and chemical inputs offered at the time.

This process not only met the needs of an emerging rural middle-class formed by farmers who migrated from southern Brazil to the central west, but also provided a way to promote a strong and intense integration of agrarian, industrial, and financial capital, which was at the base of what the literature calls the agroindustrial complex. The modern production of soybeans in the Cerrado is an expression of this. In this way, it was not only through the different phases of the Prodecet program that the Brazilian state shaped today's Matopiba, but through an entire pattern of accumulation that involved technology, the financial system, institutional organization, and infrastructure. In all, it is a huge and costly governmental operation, vastly different from the enterprising discourse that agribusiness propagates. **There was entrepreneurialism, but by the state and governmental institutions.**

On the other hand, it would be unfair to attribute everything to the state. Government action mobilized business skills brought in part by farmers from southern Brazil. We mustn't forget that among the gaúcho farmers who occupy Matopiba are family farmers who have capitalized themselves over three generations and know how to take advantage of public incentives. The problem is that, a large **group of old landowners who also knew how to take advantage of the same instruments mixed in with this class of individual entrepreneurs. These landowners produce little or**

nothing but usurps political power based on the ownership of property and the symbolic power derived from it, transforming these assets into bargaining chips with the state to offset their inefficiency. Land fraud and the repeated renegotiation of debt with the financial system, backed by the National Treasury, are the best-known faces of this part of the business community that brings out the old patrimonialist state, which does not act on behalf of social and universal values and benefits, but rather reproduces the conditions and forms of domination of traditional sectors that insist on remaining present in each moment of history. **Matopiba is the synthesis of all these processes and the not always laudable combination of private interests and the appropriation of public resources and incentives.**

B. A new phase in territorial formation: internationalization and financialization of environmental assets

The second conclusion is that **the public image of Matopiba as the frontier of expansion of national agribusiness is being left behind. Or, if the discourse is still strong, at the least it is losing touch with reality.** This is important because part of the legitimacy attached to the current economic model of the region rests squarely on the affirmation of national interest. In its place, most pronounced since the international financial crisis of 2007/2008, **a new phase of territorial formation has taken shape, now marked by growing internationalization and financialization of local environmental assets - land, water, and forests.**

It is true that little data is available and the knowledge accumulated and proven on this theme is still incipient. Yet this report presents direct and indirect evidence about the region that points to the growing presence of international capital, in a veiled manner, as a way to sidestep restrictions and legislation relating to the purchase of land by foreigners. We also showed how **natural resources are being diverted from their eminently productive role to one where their value is determined by a set of other processes shaped specifically in the financial sphere and can involve high levels of speculation**, as in the case of securitization operations and futures contracts based on projections of demand and market prices. These aspects go far beyond the factors determined by production and by mechanisms of supply and demand for commodities. The final result of these factors is a condition in which the forms of control over these resources and over their value are increasingly determined by national economic groups or even the Brazilian government, with effects on territorial sovereignty and food security for the country as a whole. In the end, it is not just a political problem. The impacts of these changes on territorial development tend to be severe, to the extent that they indicate an even greater draining of revenue from the regional space, sterilizing the local economic and social fabric further. This process does not occur without conflict, as will be addressed in the fourth conclusion, which deals specifically with the contradictions of the model in question.

The overriding objective was to gather evidence that would allow us to question the dominant discourse in the region, according to which the entrepreneurial efforts of Brazilian agribusiness have transformed the region into an oasis of high productivity, with beneficial effects for the broader public. This would make certain environmental costs, such as deforestation, something acceptable, a cost of progress.

C. The socioeconomic impacts: four Matopibas

Before moving on to the theme of conflicts, it is important to mention the third conclusion, which specifically addresses the heterogeneity of the socioeconomic impacts of this model. In short, there is not one, but at least four Matopibas when the territorial question is analyzed from the perspective of the social and economic indicators of the municipalities. **The secondary data analyzed shows clearly that the municipalities that were able to associate elevated production and above-average indicators of well-being are a minority in Matopiba. What predominate are precisely the poorest municipalities, with low production and low indicators of well-being. Even in most of the municipalities that present high production indicators, below-average indicators for well-being predominate.**

The four types of municipalities found in Matopiba are as follows:

I. Rich municipalities, in which high production and productivity translates into social indicators that are above average for the state in which the municipality is located – for example, LEM/Barreiras in Bahia. The number of municipalities in this group is extremely limited, due to the territorial dynamic described above.

II. Unjust municipalities, which, although they have high production and productivity, are not able to translate this economic dynamism into positive social indicators. On the contrary, they oftentimes present indicators that are worse than the state averages. This is the frequently case for the areas immediately surrounding central municipalities, such as Corren-

tina, Formosa do Rio Preto, and other top soybean producers.

III. Moderate municipalities, which despite weak production present indicators that are above state averages. These are absolute exceptions.

IV. Poor municipalities, which present fragile social and economic indicators. These make up the majority of municipalities in Matopiba.

This analysis refutes the argument that a concentration of good socioeconomic indicators can be taken for granted in a region marked by economic dynamism, recent as it may be. Some thought the positive effects would be felt in a large number of municipalities as the dynamism radiated outward toward a larger number of localities. What was found is that this is not a question of time since even in the municipalities where dynamism took hold earlier, at the same time as the municipalities that achieved the highest indicators, the majority do not translate performance in wealth generation into well-being.

The problem is, therefore, related to the structure of the territorial development. It is clear that the concentration of the best-performing indicators is inherent to the model used there.

As a result of the concentration of production and specialization of the economy, the conditions necessary for wealth to spread to surrounding municipalities have not been created. On the contrary, it has to be concentrated in these municipalities since this is where the producers and an elite that generate their revenue in the surrounding municipalities live, but irrigate flows in the central municipality because only in these locations is there the density of population and wealth that encourages a

diversification of the economic fabric. In the others, this becomes impossible because of the lack of concentration.

This finding is supported by the theoretical literature on rural territorial dynamics, according to which socioeconomic performance is the result of five key factors:

I. The forms of access to and use of natural resources.

In the case of Matopiba, land is historically concentrated in the hands of small groups, and highly restrictive for the majority of the original population of this territory. Hence, there is a barrier to entry for local social actors that relegates them to a subordinate position without the material resources or political representation necessary to influence the direction of social and economic life.

II. Access to markets, which in the case of Matopiba promotes the generation of wealth that is responsible for the economic dynamism of the territory by providing the sale of products in valued and dynamic markets.

III. The productive structure, which in Matopiba does not achieve the diversification or deconcentration capable of benefiting broad sectors of local society because it is based on concentrated forms of access to natural resources. On the contrary, this productive structure remains highly specialized around a single or just a few products – in this case, soybeans.

IV. The relation with cities, which in the case of Matopiba engenders the formation of a few fragile regional centers, as with LEM/Barreiras in Bahia or Balsas in Maranhão. This is because the wealth produced is very concentrated and does not allow for the formation of

a middle class of local entrepreneurs, which would lead to the dynamization of more and more promising urban centers; furthermore, part of the surplus generated is spent outside the territory, hindering the endogenization of wealth that would lead to the strengthening of the urban fabric and the diversification of economic activity.

V. Public policies, which in Matopiba work not, do not work to reverse the effects of the four previous aspects, but rather to deepen them. The result is the formation of a social and economic fabric in which the **assets necessary** to participate in social and economic life and the means to influence outcomes are equally concentrated in a restrictive **social coalition**, generating a mechanism of circular causation that reiterates the decisions made throughout regional history. This makes it difficult to catalyze the existing and undeniable conflicts and makes them the basis for the emergence of new narratives and alternative models, as laid out in the next topic.

In this part of the text we will show that there is a rift in the performance of the indicators that revisits the theme of relations between state and market. Matopiba performs worst on precisely those indicators that depend on access to revenue: monetary poverty and income inequality. The best performance is observed for those indicators for which government spending in the provision of social services and infrastructure is most determinate: life expectancy, registration at secondary school, and infant mortality. **This not only reinforces the idea that the state is a fundamental actor in shaping development indicators in Matopiba, but also that the coming period may signal some resurgence in living standards, since the pattern of government investment has changed after the economic crisis in the middle of this decade.**

D. Land conflicts, over water resources, and intra-elite conflicts

In this fourth conclusion, we examine various types of conflict that have been observed. In the body of this report, at least three types were highlighted. The first and most common are land conflicts, with leading roles played by land grabbers and, to a lesser degree, business groups, on the one hand, and traditional populations on the other. The second type of conflict, which is less common, though growing in number and with high potential to involve larger contingents of the population, involves the issue of water. Initially, this type of conflict is triggered by lower availability of water for traditional communities, as a result of the excessive use of this resource by agribusiness, especially in irrigation. Yet later, the entire population of the affected municipalities begins to sympathize with the

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complaints of the communities of farmers, since the problem of water scarcity and quality is also felt in the urban centers.

The third type of conflict, in general ignored by the literature and by organized social players, involves the contradiction of interests between fractions of the local elite. This might take the shape of conflicts between national businessmen and the threat of control of resources by foreign groups. At other times it involves local political elites in opposition to the economic elites, since the tax system prevents small municipalities from earning anything from the production of soybeans (the Kandir Law exempts exported products from the collection of certain taxes). Typically, these intra-elite conflicts are duly dealt with. One of the factors that allows this resolution is the continuous expansion of the agricultural frontier, which continues to place new land on the market, relieving pressure on those less capitalized sectors by providing them with new areas of refuge against the pressure from more capitalized groups that acquire land in more established areas with better infrastructure. The non-aggravation of these conflicts depends, therefore, on the forms of regulation of the farming sector, which are in constant dispute by the different narratives and coalitions of actors.

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E. Narratives, actors, and coalitions

With regard to the business sector, what can be observed is a narrative based on the myth of the heroic individual entrepreneur, in which the entire role played by the state in the creation of Matopiba is forgotten. The government, when remembered, is associated with inefficiency in providing adequate infrastructure to reduce costs and the stability needed for private investment. Another important component of the business discourse is the idea of complying with the law, in terms of deforestation, land regularization with the requisite legal reserves, and the use of pesticides or water resources. This component is absolutely central to the industry discourse and contributes to building the myth of the heroic entrepreneurship of agribusiness, whether or not it is grounded in local reality. Violations of legal limits are treated as exceptions and associated with the imperfections of the institutional environment, never with business behavior. The consequences of the existing problems, in the case of (legal) deforestation, are presented as the inevitable costs of the generalized progress provided by the sector. The situations that risk legal uncertainty and could, therefore, result in restricted access to the financial system or more demanding markets are the Achilles' heel of the sector, as was demonstrated in the case of changes in the legislation and in environmental licensing procedures in Bahia. In cases like these, the sector surrenders to the need to change behaviors and practices.

With regard to traditional communities, what is observed is a discourse of reactive resistance, based on the defense of rights, without questioning or forming an alternative narrative to the dominant model. Some cases are marked by a certain resignation, as if the extinction of the ways of life of these communities is just a question of time, and the only thing left to do is to reduce the harm for those who still find themselves in this situation.

With regard to local public actors, two aspects draw our attention. There is strong pragmatism, admitting on one hand the existence of excesses by part of the business sector, but on the other the impossibility of doing without this sector, since it was responsible for the strong economic transformation of these municipalities (even if the reach of this transformation is limited in its beneficial effects compared to the opulence of the sector). Another aspect is the deep unawareness by municipal administrators regarding what happens in the local business world. There is simply no systematized information about who the producers present in the municipality are, and what has changed in terms of ownership and land use. It is as if the companies existed in a parallel territory under the aegis of municipal government. However, there is also a vulnerable point here: many municipal administrators are calling for a review of the federative pact and tax structure that would allow them to collect a larger part of the wealth produced locally, something that the current collection system does not permit.

With regard to state public actors, this pragmatism is even more pronounced. The influence of agribusiness on state governments is enormous, since these producing regions are generally responsible for a large part of the gross domestic product in these states. But here it is also necessary to look at the internal differences. In at least three of the states of Matopiba, alongside the secretariats of agriculture that are dedicated to supporting agribusiness, there are secretariats of rural development or their equivalent that represent the interests of family agriculture and traditional communities. Of course, there is a high degree of asymmetry between the secretariats, but their existence also reveals the antagonism that permeates the governmental structures and public bureaucracy. The same goes for the work of the Public Prosecutor's Office, which oftentimes acts in favor of the dominant sectors in the social and economic hierarchy of Matopiba. Understanding and working with these differences is fundamental in shaping narratives and alternative coalitions to the model of big agribusiness.

With regard to environmental organizations, finally, there is growing interest in the Cerrado, in contrast to the previous period in which the focus was on other biomes, such as the Amazon and the Atlantic Forest. Nevertheless, the narrative that is being shaped is still restricted to the environmental dimension, without offering an alternative to the social and economic problems left unresolved by the productive model of Matopiba. Perhaps that is why most of the local population is critical of, but also resigned to, this model. Contention over deforestation alone is not enough to generate alternatives capable of maintaining the dynamism (concentrated as it may be, it is not imaginary or unreal) driven by the production of soybeans and associated crops.

The first problem is finding a narrative capable of putting the dominant discourse on the meaning of the expansion of farming in Matopiba on the defensive, since those in use today are extremely fragmented or defensive. Up until now the emphasis has been almost exclusively on environmental themes, primarily deforestation. But, the conversation will need to advance to negotiation and innovation surrounding new modes of economic dynamization. Without this, it is unlikely the local population will adopt an alternative narrative. This is because there is a huge deficit of forms of occupation and generation of income. It was the promise attached to it that seduced the local populations, despite the criticisms, to adopt the development model anchored in soybeans, with everything that it implies in terms of selectivity, environmental destruction, and restrictions in the ways of traditional life of sectors of the same population. High-impact solutions, such as zero deforestation, are certainly important and mobilize the regional debate. However, a narrative more focused on the problem of how to reconcile environmental conservation and the well-being of the local population needs to account for different local realities. Equally important is an understanding of whether the actors, organizations, and social segments involved will be able to put this alternative narrative into action with sufficient force. Despite the importance of traditional communities and large environmental organizations, a new model of territorial development will need to include a broader spectrum of segments,

which are still distant from these opposing voices today. This is the case of part of the government bureaucracy and even the mayors of the small municipalities. It is also the case of the unorganized citizens and the fragile and diffuse power of these localities, today enchanted by or resigned to the model represented by the production of soybeans. To sum up, it is not only a matter of denouncing the deleterious effects of the model of development implemented in Matopiba: rather, and more difficult than this, the challenge is to shape simultaneously a new project for the Cerrado and a new coalition of social forces that will be able to benefit from this new narrative and, for this reason, are apt to defend it.

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The result is the formation of a social and economic fabric in which the assets necessary to participate in social and economic life and the means to influence outcomes are equally concentrated in a restrictive social coalition. This makes it difficult to catalyze the existing and undeniable conflicts and makes them the basis for the emergence of new narratives and alternative models.

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Vegetation on the banks of BR-135. Barreiras, BA





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**Quilombo Lagoa das Piranhas,
Bom Jesus da Lapa, Bahia**













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