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DEINDUSTRIALIZATION IN BRAZIL IN MULTIPLE SCALES: THE NATIONAL PARTICULARITY IN THE GLOBAL PRODUCTION RESTRUCTURING

Desindustrialização no Brasil em perspectiva transescalar: a particularidade nacional na reestruturação produtiva global

Desindustrialización en Brasil en una perspectiva transescalar: la particularidad nacional en la reestructuración productiva global

LEÔNIDAS DE SANTANA MARQUES

Federal University of Alagoas

Abstract: The issue of deindustrialization is not a simple debate, especially when we consider the wide range of authors who have debated the topic in recent decades in different areas of the Humanities and Social Sciences. This article contributes towards understanding the process considering the need to relate the concrete problem to dynamics which are beyond one or another specific spatial scale. Thus, the objective of the text is to analyze the recent process of development of Brazilian industry, considering the debate on deindustrialization and reprimarization of our economy from multiple scales. In this regard, we defend the need to consider the production restructuring of capitalist development based on a reading that regards Brazil as a particularity of global capitalism.

Keywords: dependent deindustrialization; production restructuring; multiple scales.

Resumo: A questão da desindustrialização não é um debate simples, principalmente quando consideramos a ampla gama de autores que tem debatido o tema nas últimas décadas em diferentes áreas das Ciências Humanas e Sociais. Nossa contribuição para esse debate vai no sentido de compreender o processo considerando a necessidade de relacionarmos o problema concreto com dinâmicas que vão para além de uma ou outra escala espacial específica. Assim, o objetivo do texto é analisar o processo recente de desenvolvimento da indústria brasileira, considerando o debate sobre desindustrialização e reprimarização de nossa economia em perspectiva transescalar. Com isso, defendemos a necessidade de considerar a reestruturação produtiva do desenvolvimento capitalista tendo como suporte uma leitura que leve em conta o Brasil enquanto particularidade do capitalismo global.

Palavras-chave: desindustrialização dependente; reestruturação produtiva; transescalaridade.

Resumen: La cuestión de la desindustrialización no es un debate simple, especialmente cuando consideramos la amplia cantidad de autores que han debatido el tema en las últimas décadas en diferentes áreas de las Humanidades y las Ciencias Sociales. Nuestra contribución a este debate está dirigida a comprender el proceso considerando la necesidad de relacionar el problema concreto con dinámicas que van más allá de una u otra escala espacial específica. Así, el objetivo del texto es analizar el reciente proceso de desarrollo de la industria brasileña, considerando el debate sobre la desindustrialización y reprimarización de nuestra economía en una perspectiva transescalar. Con eso, defendemos la necesidad de tener en cuenta la reestructuración productiva del desarrollo capitalista a partir de una lectura que considere la realidad brasileña como una particularidad del capitalismo global.

Palabras-clave: desindustrialización dependente; reestructuración productiva; transescalaridad.

INTRODUCTION[1]

The Covid-19 pandemic, which has crossed the world at the beginning of the third decade of the twenty-first century, has unfolded consequences which are beyond the public health. Due to the need of social distancing to avoid spreading the virus SARS-CoV-2, several important aspects, such as in-person education and leisure activities, in our daily human sociability were completely or partially suspended. One of the main unfoldings which are mentioned in this context is the closure of companies, many of which connected to the service sector. Due to this kind of questions, there are accusations that it would be breaking down the country's economy and its treatment would have been more harmful than the illness itself.

Our text goes on a different direction. We believe that, indeed, the Brazilian economy has had some problems, however, a broader reading of the social processes and not necessarily the immediate circumstance must be taken into consideration. We discuss here a process which, in our point of view, could be understood as something which has already been happening for some decades in Brazil, although it has become more and more evident by the news broadcast by the media about the closure of manufacturing units in the country. (Lemos, 2020; Mercedes-Benz, 2020; Ford, 2021; Salasar, 2021; Souza, 2022). Its focus is the deindustrialization of the Brazilian economy.

Our aim is to analyze the recent dynamic of the Brazilian industry development, considering the debate on deindustrialization and reprimerization of our economy in a trans-scale perspective. In this respect, we would like to defend the need to consider the process of production restructuration of the capitalist development, supported by a reading which considers Brazil as a particularity in global capitalism. In this sense, we believe that it is not possible to analyze the reprimarization of the exports; and the deindustrialization, only considering processes which take place in a national scale. Neither have we evaluated that it would be possible to deal with the debate which thinks that there are no particularities in Brazil for a process which happens on an international scale, as the creation of value global chains.

Our text is organized in three parts, besides the introduction and the final considerations. At the first moment, we tried to summarize the debate about deindustrialization, considering some terms which have been the basis for the issue as well as critical contributions which observes the process beyond the apologetics view of the question, for part of those who defend the overprotection of the industrial capital and for those who defend the intensification of the phases of the economics liberation and the removal of workers' rights. In the second part, we have brought to light the peculiarity of the capitalist development in Brazil, emphasizing particularly the industrialization. We evaluated the multifaceted character of our deindustrialization process, bringing arguments about the dependency condition of our development and how it helps us understand processes

1 The author thanks the professors Sandra Lencioni, from University of São Paulo, and Regina Helena Tunes, from Rio de Janeiro State University, for their careful reading and their suggestions to improve previous versions of this text.

like the industrial specialization and the loss of participation of the national industry under different perspectives. At last, we have brought a third part with debates which attempt to analyze the Brazilian particularity in the face of the development of the capitalist relations as a whole. For this analysis, we dealt with debates regarding critical readings on the current circumstances, such as imperialism, neoliberalism and global value chains. We have also brought some data about Brazilian deindustrialization, regarding the reprimarization of the national export agenda and the structure of our balance of trade.

Desindustrialization: the concept and beyond it

The debates surrounding the question about Brazilian deindustrialization appear in different means of communication, connected to the mainstream media, academic environment or even to public policies. This question about deindustrialization always revives strongly in our country, mainly in texts as the ones we mentioned before, when there are closures of important manufacturing units leading to the unemployment of thousands of people. And yet, it is necessary carefulness so that any performed analysis will not be subsumed by different apologetic positions, i.e., the ones which defend new attempts on economy liberation, with a drastic reduction of worker's rights, or even the ones which see the need of indiscriminate protection of our industrial areas without just counterparts and balancing. Following the proposals of our text, we will attempt in this part to theoretically-conceptually delimit how we understand the debate on deindustrialization. This will be fundamental to elucidate the deindustrialization particularity in Brazil, which presents particularities that behave in a trans-scale manner.

The simplest definition of deindustrialization is the one which denies the industrialization process. In this sense, the collected data, even the ones related to employment, aggregate value, GDP participation and others, would point to a relative reduction in the importance of the industry in a specific national economy or part of its territory. In addition to this first understanding, we could add another one: the previous existence of the industrialization process. In this sense, it would not be possible to talk about deindustrialization or where the indicators considered in this study do not point out a relative decrease in the results of the presence of the industry. If we consider these two argumentative lines, we have a generic and, for this reason, problematic understanding. Even if these two pillars are a possible starting point, they are insufficient. We believe that it is not adequate, regarding Social and Human Sciences, to presume that the processes as deindustrialization would occur despite space-time determiners. In other words, every analysis about the industry development must be performed considering *where* and *when* the processes occur; and, deeply, their different realization scales.

As we will argue in the next parts of this text, it is not appropriate to understand the industrialization in Brazil without regarding the particularity of the industry in our country as well as Brazil's place in the current scenario of global value chain formation. These starting arguments already give us a background on how complex the debate is. At a

first moment, let us check this concept by Sampaio (2019, p. 109), when he affirms that deindustrialization

> deals, therefore, with the *relative phenomenon*, which indicates a change in the GDP structure and in the economic dynamics of a specific country. It has distinct impacts on the development in time and space and is a by-product of the financialization of capitalist wealth, via its neoliberal cut policies and advances in the internationalization of productive processes. (our emphasis)

In this fragment, the author brings us a fundamental basis for the debate: the relative character of the process. Even more, when we take into consideration its respective development in time and space. It means that, i.e., it is not for grant that in the last decades the debate on deindustrialization has substantially increased, in a context of aggravate structural crisis of the development of the capitalist relations when, with a false solution, seek the financialization of the capital and the State neoliberalism as ways to solve the problems with the global drop tendency of the profit margin of the capital.

Resuming, we should firstly consider that there is no consensus about the process existence itself in realities like the Brazilian one. As pointed out by Espósito (2017b) and Colombo *et al* (2020a), there are a lot of positions about this theme, though it is possible to notice a progressive consolidation in the academic debate, especially in Economics, the notion that what the country has passed is a deindustrialization process, based on an extensive series of statistic indicators. Some authors who, at the end of the first decade of this century and the beginning of the following one, questioned the existence of the process have explicitly changed their position[2] or simply stopped working on the theme in the last ten years[3]. Among those who defend the existence of the deindustrialization process in Brazil, their positions are distinct and, several times, divergent. From more extreme positions, we find a range from the most common positionings towards the intensification of Brazilian economic liberation by the ones who see the relative decrease of the national industry as something good, to positionings closer to the centrality of the State intervention in the economic development. Considering this broad range of positionings on the deindustrialization debate, our contribution is more in a sense of directing ourselves to a discussion on carefully observing the materialist reading of capitalist development in Economic Geography.

When we consider the specificities of what has recently been written about this process in Geography (Padua, 2010; Lamoso, 2013, 2020; Lencioni, 2015; Pereira Júnior, 2019; Silva, 2019; Gomes, 2020; Tunes, 2020), we can also notice that there are no consensus on this debate, however, in the data collected for this text, the positions of those who look with some regards at the affirmation of the deindustrialization existent in our country are predominant. Pereira Júnior, i.e., states that

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2 One of the main authors in this sense is André Nassif who migrated from a more reticent position (NASSIF, 2008) to a more agreeable with the ones who understand that there is a deindustrialization process in progress in Brazil (cf. BRESSER-PEREIRA et al, 2016).

3 I.e., we can quote Regis Bonelli, Samuel Pessoa and Silvia Matos (BONELLI; PESSOA, 2010; BONELLI et al, 2013).

> […] even considering the difficulties felt by the Brazilian industry and the decrease that several productive branches felt in the last decades, especially in the participation loss in export and the fall in added value, we defend the concept that the *use of terms as deindustrialization must be more carefully applied*. We corroborate with the fact that, including the current territorial restructure, productive and sectorial which devastates the period of globalization, the industry of transformation in Brazil tends much more to absorb a new combination among spatial, productive, financial and service relations which reset the terms of productive economy and the circulation/consumption of goods and products. The reaction to these changes, given a correlation between economic and political forces, is the enhancement of a competitiveness agenda which prioritizes the reduction of costs, whose consequence is the adoption of strategies which neglect the incentive for technological innovation and the structural improvement of the Brazilian manufacturers. (Pereira Júnior, 2019, p. 16-17, our emphasis)

Although this is just the position of one of the Economics Geography authors, we can take this fragment as a synthesis of how most texts in this area have dealt with this question. Even if other authors understand that the country has dealt with a consistent deindustrialization process, Pereira Júnior's reticent position summarizes well how an expressive range of intellectuals have positioned themselves in this quarrel in the last years. In short, the Economics Geography does not get on to the idea of a deindustrialization on a national scale in Brazil, despite acknowledging that structural changes are happening and must be analyzed with more details. A solution which these authors have found for this problem has been the use of terms involved in less polemics and, therefore, closer to a consensus among authors in Social and Human Sciences, such as resignification, restructure, reconfiguration and the loss in dynamism (Lamoso, 2013; Lencioni, 2015; Pereira Júnior, 2019; Gomes, 2020; Tunes, 2020).

Our argument goes towards a distinct direction. By our disagreement with certain conclusions that some of the main authors in Economics Science have presented and the need for considerations with any discussion which still presents the need of refinement and analysis, we evaluate that the Brazil we have in the third decade of the twenty--first century is a country which passes by the deindustrialization process. However, this statement is not presented here as a conclusive answer, on the contrary. We understand that the deindustrialization in Brazil is not more than the appearance of a process of contradictory development of capitalist relations on a global scale, which encounters particularities in countries like Brazil, which is marked by an industrialization process extremely limited regarding qualitative changes and discontinuity of the national development.

Analyzing the differences among countries which had in their industrialization an important motor for social and economic development and countries which did not have it, Cano argues about the need to understand the particularities of Latin American countries, i.e., the Brazilian case.

> Many underdeveloped countries have also established the industrialization processes in their territory. A few of them, however, got to go significantly beyond the production of nondurable goods and simple industrial processes of primary goods. Even in Latin America, just Argentina, Mexico and Brazil got to establish an expressive industrial park and,

> among them, only Brazil advanced to a partial assemblage of the capital goods sector. At the end of the 1970's, these countries had an industry of transformation, whose product represented about 23% of the GDP, in the case of Mexico, about 25 % in Argentina and about 33% in Brazil. With nefarious effects, however, from the lost decade of the 1980's and the following establishment of neoliberal politics from the 1990's, the fall of the industry of transformation participation on the GDP in Latin America as a whole was devastating. (Cano, 2012, p. 833)

The intense processes of economic integration that the Latin-American countries underwent at the end of the twentieth century are fundamental parts for the understanding of the argument developed here. Herewith we state that, and emphasizing the Brazilian particularity in this text, some points we discussed in this text help us understand the recent capitalist development of countries in Latin America as a whole, notwithstanding understanding them as a homogeneity. The industrial development of these countries along the twentieth century happened in a heterogeneous manner and just some countries have really reached the end of this period with important industrial parks, notoriously Argentina, Brazil and Mexico. Despite these heterogeneities, the increase of the capitalism internationalization in the second half of the last century promoted in each continent the creation of global bonds, drawing again the international division of work.

Deep transformations in the work-capital relations are added to these processes on a global scale, with the intensification of outsourcing and other forms of making the labor relations more precarious all over the world (Alves, 2007; Antunes, Druck, 2018). In this sense, several work positions which were previously part of the industrial segment shifted to the service sector. As pointed out by Maia (2020), this is one of the causes of deindustrialization that justified a certain "statistical illusion" on work position indicators which would present a decrease in the number of industry employees, when actually these positions would just have been relocated to the service sector. Although we, in general, agree with those ones who defend this perspective, along with our readings about this problem, this question may be dealt with in a distinct manner. If we effectively have a qualitative change in the profile link to the industry job positions, it is undeniable that, in realities like the one in Brazil, the outsource generates more than a simple statistical alteration in data. The new work positions which are created in this process have a qualitatively different nature, being marked by an extreme precarization and fragility of bonds. Although it is not our purpose to debate each one of the indexes that are proposed in the studies about deindustrialization in Brazil, it is necessary to highlight that even in the most limited ones, those referring to the workforce, there is much more than just a statistical illusion in the chart. There is a potential increase in the precarization of work, a founding facet of the new historical moment of the capitalist development in which we live.

After these first arguments about what we understand about the ongoing deindustrialization process in Brazil, we must go ahead with the question about the capitalist development particularity in our country, highlighting the industry. Without this important reference, it is more difficult to discern the recent contradictions of our territory. Before that, however, it is with to summarize some points: a) we evaluate that Brazil is going through a deindustrialization process which is neither homogeneous, nor happening in our territory

(uneven regional development), and not even in a global scale; b) to state the existence of it just means an affirmation about the appearance of the process, since the deindustrialization can not be explained only in itself, but for determiners which must be sought in time and space; c) this process is multifaceted, being able to present itself, i.e., through the closure of a manufacturing unit, outsource/precarization of the industrial workforce, the increase of the technological gap between our industrial park and others around the world, the reprimarization of our export agenda. The deindustrialization particularity in Brazil goes through our dependent capitalist development, which becomes more perverse with the neoliberalization of the State in a context of global production restructure. Then we shall advance in the understanding of what exactly the deindustrialization reinforces, and what exactly makes us more particular.

Desindustrialization in Brazil: the particularity of a dependent developing country

The proper understanding of the deindustrialization process in Brazil goes through the reading about the peculiarity of our capitalist development which keeps the basis of the reality discernment from the mediation between the capitalism as universal and Brazil (originating as a colony, in a Latin America context) as a particularity. It is not possible to explain the industrialization of the country without understanding the general fundamentals of the production mode in which we find ourselves, while it is necessary to consider that the capitalist development is not based on an overwhelming homogeneity that disregards the heterogeneity that precedes it and is reproduced by it.

One of the fundamentals of our particularity is our dependency. It manifests itself in different dimensions, as for a dependent Bourgeoisie or for a dependent industrialization. This way, understanding the particularity of our industrialization process, we believe that just looking at internal aspects of the country is not enough to understand the actual deindustralization. Notwithstanding the first step we will take in our text is exactly to understand, in general, how our particularity in a dependent capitalist development is built up and how it co-substantiates in our industry.

Considering the excessive number of authors who reflect on this question about the capitalist development in Brazil, we evaluated that Caio Prado Júnior contributes with a seminal approach. Part of this understanding has already been dealt by us at another moment (Marques, 2020). Among the conceptual peers of his work, we highlight one which seems fundamental: colonial economy and national economy[4] (Prado Júnior, 1974). On the one hand, the second concept goes towards a nation which organizes itself according to its own needs, presenting endogenous dynamics which determines its development. On the other hand, the concept of colonial economies is linked to an interpretation of countries which present some kind of dependency that is particular to it, which determines its

4 In several passages of our text, we will use the term “national economy” in a more colloquial meaning, as a synonym of Brazilian economy, without referring, at these moments, to Caio Prado Júnior's concepts written here.

organization based on a strong presence of interests which are beyond the country's borders. In the author's understanding, Brazil must be interpreted as an economy with colonial reasons. And this strong presence of international interests in the development of the country is associated to the participation of the financial capital in our economy. For Prado Júnior, in a certain way, we are facing a limited economic development that along its history comes across objective limits which are derived from its colonial past.

> On the course of this transformation process, this blockage is set by the reminiscence of the old colonial system that disturbs the continuity and limits the perspectives. As a result of this obstacle, fundamentally, […] of the precarious internal consumer market and its defective structure – an inheritance, at last, from that colonial past –, a market which, in a vigorous regime of free enterprise that is stimulated by a higher financial interest and maximization of the profit, does not offer the needed impulses for the promotion of economic activities in proportions and conditions which assure a rhythm which is sufficient to keep the growth of the market itself (Prado Júnior, 1989, p. 124).

Thus, our colonial inheritance from the seventeenth, eighteenth and nineteenth centuries is something like a present-past, a colonial passivity which determines how the capitalist relations develop in Brazil. This argument could be understood considering our industrialization process. Analyzing the subsidiary industries in the country, Prado Júnior highlights how its structure has in its core the association between local fractions of the capital and the foreign capital, where the latter determines all the industrial development.

> The capital and international entrepreneurship will broadly benefit of this large advantage in the situation that is promoted in Brazil. […] The real dynamic core in the Brazilian industry is constituted – nothing more than – by a bunch of international branches around which will revolve all of which our industry has as the most expressive of it. […] the dependent relationship, in which the predominance of international entrepreneurs in the Brazilian industry determines between the industrialization processes and the Brazilian export, is immediately identified (Prado Júnior, 1989, p. 126-127).

For this author, this subsidiary profile present in the origin of our industrialization process is an unfolding process of the colonial period, becoming a present-past in the development of capitalist relations in Brazil. Thus, the industrialization that occurs in the Brazilian territory is marked by discontinuous and unordered impulses, which tend to become our industrial development pattern, given that it is more defined by the financial market than by interests linked to internal demands in the country. Prado Júnior highlights, still in the second half of the twentieth century, the progressive increase of the international capital in the Brazilian economy and how its interest determines and limits any possibility of a minimally sovereign development.

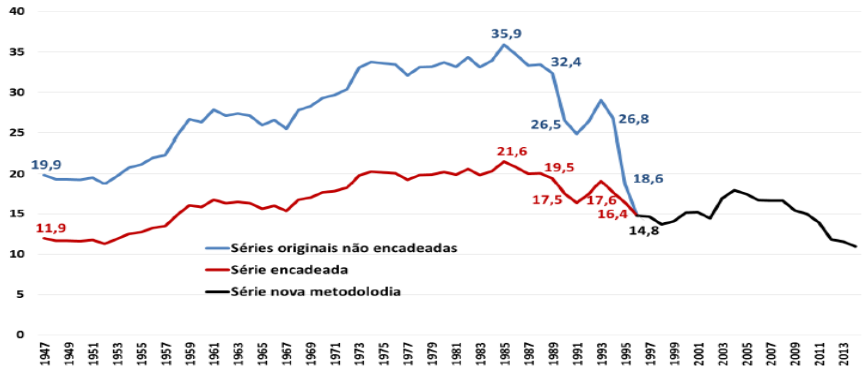
Moreover, Prado Júnior highlights how the nineteenth century could be understood as a fundamental moment to understand the development of capitalist relations in Brazil, including its industrialization, and even recognizing that many new processes came to light only in the twentieth century. And, in this sense, one of the main discontinuities of the development of capitalist relations in Brazil is the 1930's. In the context during Vargas' first government period (1930-1945), we have something which is considered an emergency

moment of our industrialization process, although other experiences with manufacturing plants are registered in several parts of the country before that moment. Without any doubt, one of the great differentials of the period that begins in the 1930's are the public policies which were implemented to serve as the engine of industrial development, with motivations for private business to broaden their investments and entrepreneurship and with the creation of State companies aiming to increase national development. With all necessary regards, the decades from 1930's to 1980's are marked, in general, by the strong presence of the State as a booster for the industrial development, inclusively raising foreign investments.

This period, known mainly by the processes that occurred in the first half of the twentieth century, is known as import substitution industrialization (ISI). The main focus at the first moment of this period was the establishment of an industrial park which decreases the need for import of basic goods for the Brazilian consumption, yet limited, at first, focused on goods for a small part of the population. Along decades, a scenario was constituted, in which more and more items of the productive process started being produced in national soil, which provided a vigorous industrial park. That, however, does not free it from the basis of the dependent economy, which brought it to what Mello (1991) called restricted industrialization, which means, despite the apparent autonomy and strength, the bases for our industrial development took place on the lack of local decision centers in the Brazilian territory.

Usually, one of the main charts which has been used as an effort to synthesize the industrialization history in Brazil was made by the Federação das Indústrias do Estado de São Paulo (FIESP – the Industry Federation of the State of São Paulo). Presented on Figure 01, the main focus of the chart is to show two great moments of our industrialization process. The first is marked by the increase, from 1930's to 1980's; and the second is marked by a decrease, from 1980's to the current date. The second moment would be our deindustrialization process.

Figure 1 – Brazil: participation of the industry of transformation on the GDP (in %), between 1947 and 2013 – original and corrected series



Source: FIESP, 2015.

For this text, we chose the version adapted by FIESP itself, after critiques on the first version for not considering the changes occurred in IBGE's methodologies along the time. The blue line indicates the original version of the chart, while the red one indicates the adapted series, being the most appropriate one for an analogy with the new data. In black, there is a series which has not been altered from one version to another for not having occurred substantial changes in IBGE's methodologies since 1990's.

Besides question on the technical nature, other considerations must be made. History does not repeat. It is not possible to believe that, i.e., by having an industry participation percentage on the GDP in the twenty-first century similar to the 1950's we would be dealing with identical processes. Brazil is not the same, the world capitalism is not the same, not even the industry is the same, in all their dimensions, although its dependent and laggard character continues helping us reveal some continuities. Thus, it is necessary to approach what has happened with the Brazilian economy (and its industry) from the 1980's until the current date.

> Since the 1980's, the Brazilian economy finds itself in a long-term circle of little growth, reduction of investment rate and the removal of the State as a development coordinator. The articulations between the macroeconomic, microeconomic and territorial brought up by the ISI model has passed by a slow and gradual disassembly, which has met a new phase in the *great recession* of 2015-2016. In the 1980's and 1990's, the non-financial companies had successive *defensive adjustments* […], that took them to a reduction in the investment level of the economy, with substantial impacts on the investment capacity in leading the long-term growth. (Sampaio, 2019, p. 112, original highlights)

In this sense, what we have in the Brazilian scenario in the last four decades is the insertion of the national economy, already historically determined by dependency and delayed industrialization, in a globalization of the capital which is marked by the establishment of global value chains in which Brazil progressively places itself in a position which reinforced its structural contradictions. The 1980's, which brought necessary and new times with the resumption of civilian presidential governments and the most democratic Constitution of our history, were the years of a huge commercial opening in the country. Since then, a series of national policies were implemented with the focus on the economic liberation and "necessary adjustments" so that Brazil could place itself in the global scenario in a more "competitive" manner. Nothing is more fallacious than that.

The 1990's were, for its excellence, the decade in which this process had its highest moment. Redimension of exports, a deep privatization program and strict money exchange control by Plano Real are some of the main processes of this period that, not for nothing, is understood as the climax of neoliberal politics in Brazil. All measures defined by Washington Consensus, which accounted with a severe regulation of multilateral organisms like World Trade Organization (WTO), the International Monetary Fund (IMF) and The World Bank, were responsible, in Brazil and in great part of the world, for the consolidation of the production restructuring in global scale, initiated years before in countries like Chile, United States and United Kingdom.

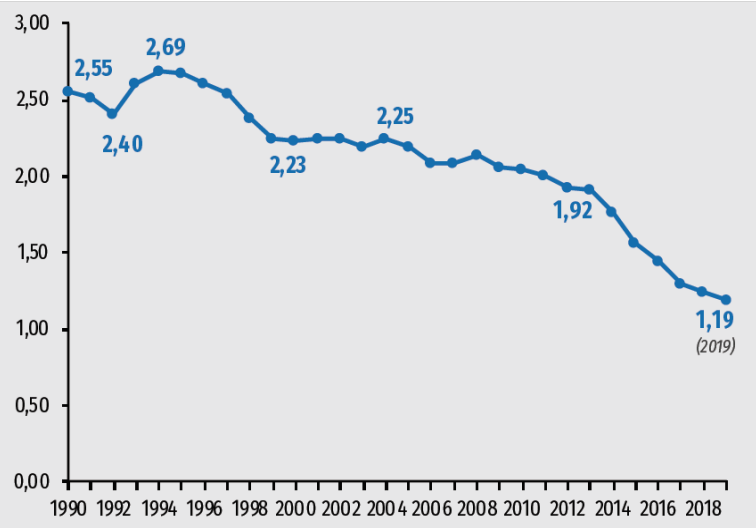
In Brazil, the production restructuring has presented deep consequences, though there is no consensus about all of them, i.e., the understanding of deindustrialization itself. Yet, several examples of these consequences may be suggested. Gomes (2020, p. 146) argues that, with "the commercial opening in the 1990's, the entry of Asian products in the Brazilian market was disastrous for the national industry, providing the closure or acquisition of many companies". In turn, Lamoso (2020, s/p) indicates that the "Brazilian economy, weakened since the end of the 90's by deregulation policies, privatizations without criteria which were compatible with a sovereign national development project, started to present signals of deindustrialization and to consolidate, at the beginning of the twentieth century, a reprimarization of exports".

We believe that some more quantitative data could help us have a panoramic view of this process in a national scale. We do not disagree with Pereira Júnior's (2019) and Tunes's (2020) considerations about the need of being prudent with the excessive use of statistical data without being properly combined with other kinds of arguments on the question of the country's deindustrialization. See below a chart (Figure 02) which shows Brazil's participation in the industry added value of the world transformation.

Before pointing out some important aspects of this chart, we should include some considerations. Different from Figure 01, in this one we have another variable: the added value. We believe that these data, when dealing with a broader view of the question, get to bring us a deeper reading of the industrial dynamics, since we deal with the production process here. It helps observe, i.e., the participation of the workforce fractions which, by other indicators, are considered as service sectors. Another important aspect is the historical moment, considering the three last decades, decreasing the margin of error derived from possible data readjustments according to the different collecting methodologies.

Clearly, Figure 02 points out to a long-term decrease tendency of the Brazilian industry in global production. Even considering that this datum is strongly influenced by China's intense development in the last years, the tendency signalized since the 1990's is at least worrisome. Even though there is still a disagreement about this process being or not an indicator of deindustrialization, it is clear that something is happening with the national industry. Moving from a global scale to another one, on a national scale, we have the value added by the industry in general (and not only the industry of transformation) in Brazil compared to other economic sectors (Figure 03).

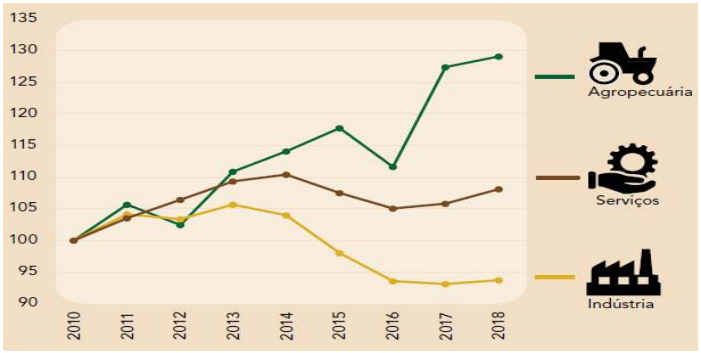
Figure 2 – Brazil: national percentage of added value of the industry of global transformation, between 1990 and 2019



Source: CNI, 2020.

Differently from Figure 02, here we have the industry as a whole. This, in our perspective, even softens a little the participation falls of this sector in a general calculation, considering the extractive industry, whose dimension is usually not considered in studies on the deindustrialization process. This last series is also singular for being a relatively short period, consisting of basically the second half of the twenty-first century. One of the possible conclusions in this chart is that, considering some changes in social policies, the governments of Partido dos Trabalhadores (PT) kept many of the macroeconomic policies of the governments of Partido da Social Democracia Brasileira (PSDB), mainly when considering the infamous primary surplus, floating exchange rate and the inflation target. As pointed out in the previous text (Marques, 2018), we did not have any huge discontinuity in the implementation of the neoliberal policies in Brazil in the twenty-first century, which, by the industry of transformation's point of view, meant an increase in the production restructure process. After decades of governments linked to neoliberal pillars, Figures 02 and 03 end up highlighting the nefarious result of the insertion of the Brazilian dependent economy in the global value chains.

Figure 3 – Brazil: gross added value on basic prices, by groups of economic activities, between 2010 and 2018 (2010=100)



Source: IBGE, 2020.

The data presented so far refer to the industry (general or only transformation) without entering its specificities. It is out of the scope of our text to enter minimum details about the industry segments. However, a study carried out by Espósito approached this question more deeply. One of his conclusions

> […] points out to a decrease of the sectoral structure of the industry, since most of the activities cited by the research lost participation [...]. That is, a higher specialization of the Brazilian industrial sector was observed. This situation becomes even more alarming by the fact that only two activities are responsible for most part of this relative gain [petroleum products sector (CNAE 19), with an increase in 4,88 p.p., and food (CNAE 10), with an increase in 2,83 p.p.]. This way, the relative participation of the three main industrial segments (related to VTI) increased from 26,91% of the total, in 1996, to 37,38%, in 2014. (Espósito, 2017a, p. 128-129, our emphasis)

The analysis performed by this author comprised the distribution of the total value of the industry of transformation per activity considering the period between 1996 and 2014. The choice for this period was also influenced by the limits posed by several methodologies used by IBGE along the years. Two points set by the author call for our attention. The first one is that, considering several subdivisions of the industry of transformation, it is possible to notice that the altered percentage does not happen in a homogeneous manner. There are segments with intense reduction (i.e., "computer equipment, electronic and optical products" and "machines, electric gadget and materials"), segments with relative stability in the period (i.e., "paints, varnishes, enamels, lacquers, related products" and "furniture") and segments with important growth, as the highlighted ones in the previous quotation. In general, however, more than a heterogeneity, it is possible to state that there is a process of industrial specialization in the scope of Brazilian deindustrialization. Furthermore, this specification converges on activities which are more connected to the primary sector, increasing the complexity of the country's position related to the value global chains in the new time-space scenarios of the international division of work in the twenty-first century.

All the effort we made in this item, which dealt with issues about the particularities of Brazilian reality, put into perspective that the development process of capitalist relations in

Brazil (and actually in Latin-American countries) have as its basis the dependency issue. Starting by this more general understanding, it is clear that our industrialization process which followed along the twentieth century, not disrupting our present-past of colonial origin, just reinforce the structural dependency. As Lamoso (2020, s/p) argued, “Brazil is constituted as a nation dependent on its relations with the external market and responds to its expansion and retraction stimuli, reorganizing the production structures in the territory.”.

Not breaking up with the dependent development, the industrialization occurs in our territory in a laggard and dependent manner. Even though there are disagreements about the understanding about what is really happening in our country, it is important to reinforce that our dependency becomes more and more evident (LENCIONI, 2015), and that, at the same time it preserves structures of our past, it continues restructuring our development under new forms. We believe that, in the production restructure context at the end of the twentieth century and the establishment of some neoliberal actions in different scales and dimensions (Harvey, 2008), Brazil’s macroeconomic policies have responded with deep transformations which determine a vicious cycle of gradual loss of the industry’s importance. On a global scale, what “neoliberalism does is to deepen the structural mechanisms of the dependent capitalism, through the transference of a greater and steady part of this produced value.” (Strauss, 2018, p. 153). In economies as in Brazil this process materializes, as in Sampaio’s arguments (2015, 2017, 2019), in the relative deindustrialization in the territory. And, beyond the understanding of Brazil’s particularities, it is necessary to advance, even sooner, in the debate on another scale. Exactly by dealing with a dependent development, it is necessary to evidence some more points related to the global dynamic of capitalism at the end of the twentieth century and beginning of the twenty-first century. The Brazilian deindustrialization must be explained by measuring the capitalist dynamics and the national particularities.

Desindustrialization in Brazil as a part, global production restructuring as the whole

The capitalist development all over the world acquires outlines which are historically and geographically determined. It is neither possible to talk about a production model that remains the same since the sixteenth century, nor is it right to affirm that the realization of capitalist relations occurred equally in different parts of the world. In this sense, to talk about capitalism in the twenty-first century requires precision about the time we live and believe that a starting point for it is the understanding of the imperialist period which has been in development for some decades.

> Imperialism is capitalism at that stage of development at which the dominance of monopolies and finance capital is established; in which the export of capital has acquired pronounced importance; in which the division of the world among the international trusts has begun, in which the division of all territories of the globe among the biggest capitalist powers has been completed. (Lenin, 1974, p. 266-267)

Obviously, there are some necessary considerations to the original Leninist theory on imperialism, given that many tears have passed since the original writing of his argument. Mainly since the decolonization processes of Asia and Africa, most part of the world started being organized by national States with indigenous governments (although there are still classical cases of colonialism which we will not mention). Moreover, the capitalism passed by deep processes of production restructuring, including the most recent one to which most comments were dedicated in this text. Even though we evaluate that the core of Lenin's arguments continues valid, which makes us affirm that we live in the imperialist period of capitalism, lying on monopoly domination and the financial capital. Actually, perhaps never before in human history we had lived a moment in which this assertion could have been so notorious. As Smith (1997) argues, what we know as globalization is nothing more than imperialism in its pure form.

Along the five last decades, the capitalist imperialism passed by some discontinuities derived from adjustments in the capitalist relations on a global scale. From the point of view of countries like the United States and members of the Western Europe, we observe emerging forms of more flexible productions, centered on the exploitation of the workforce removing the rights historically acquired, mainly, after the Second World War. Authors as Harvey (1992) indicated this transition as fundamental for understanding the capitalist development in the subsequent period. Especially in relation to what we are approaching in this text, the emergence of a new economic reality on a global scale will be formed in different levels and have an eminent multidimensional character. Thus we want to state that we see Toyotism/flexible accumulation (as a production rule), the globalization (as the increase of the imperialist internationalization of the capital), a financialization (as the alleged hegemony of the financial capital) and the neoliberalism (as the transformation of the State), among other processes, as part of an open an complex totality which is the capitalist development in the twenty-first century facing a production restructuring that started in the second half of the twentieth century. Even occasionally we should highlight some parts more than others, it is this reading of totality that bases our understanding about the Brazilian deindustrialization.

Specifically related to the regulation of the capitalist State, important reforms were implemented starting in the 1970's, which has unfolded into implementations in every and any public policy. Lying on the fallacious notion about freedom as the basis of a complete capitalist development, authors as Harvey (2008) will call these movements of the capital as neoliberalization processes, which are present beyond the limits of the State. In some of the main western capitalist countries, the presence of stagflation (increase of unemployment associated with inflation and low economic increase) during the 1970's and 1980's was a *sui generis* time-space context for the emergence of structural reforms of the capitalist State regarding the priority re-orientations, though this process has occurred in an unequal manner in several parts of the world.

> The uneven geographical development of neoliberalism, its frequently partial and lopsided application from one state and social formation to another, testifies to the tentativeness of neoliberal solutions and the complex ways in which political forces, historical traditions, and existing

> institutional arrangements all shaped why and how the process of neoliberalization actually occurred. (Harvey, 2005. p. 13)

Thus, the universality of the neoliberalization process in several parts of the planet, lying on the need of broadening the reproduction of the capital and overcoming the crisis, have not considered the particularities and inequalities of several places and regions, their various and singular structures of class power and their own forms of work organization. Notwithstand, this uneven (and combined) development of the neoliberalism did not distance from a decisively converging point that, according to Harvey (2008), points out to the core of the process: the expressive concentration of capital resulting from the neoliberalization and its derived class restructuring on a global scale.

Regarding the Brazilian particularity, we have one of the most important discussions that we must evidence when the issue is the neoliberalization of the State and the reorientation of public policies regarding a free competitiveness of the national economy. It has a direct dialogue with the deindustrialization issue. From the second half of the twentieth century, as part of the production restructuring process of capitalism on an international scale, we have had an orientation, many times coming from multilateral organizations such as IMF and The World Bank, to adapt the national economies to scenarios of formation and consolidation of global value chains. In this process, countries like Brazil passed by deep re-orientation regarding “inserting itself in a more competitive manner” in the new global economic scenario.

> From the 1980’s, the industrial production led by huge corporations of developed countries started a process of change in their organization form for those ones understood as value global chains. This microeconomic alteration in the form of manufacture had important effects on the investment dynamics and the external trade on a global scale and affected the world organization of the industrial transformation, with sectorial and territorial alterations. In other words, the strategies for cost reductions of huge global corporations promoted distinct interactions, but specific in each country, between the industry and the territory, increasing the concentration and centralization of the capital. This movement, marked by a relocation of companies, redefined the national economy’s role on the global cycle of wealth valorization (productive and financially) and provoked important processes of world social-space adjustments. (Sampaio; Macedo, 2014, p. 51)

Even though all transformations presented by the authors were not clear in the 1980’s, we could steadily notice how these changes were being formed in the Brazilian economy, especially when we see the news as the closure of important and traditional manufacturing plants in the national territory. The closure of the activities in plant units as Caoa Chery (Souza, 2022) or LafargeHolcim (Salasar, 2021) must be seen as a global movement of the capital searching for better conditions for a higher value extraction in the chain. The way these huge industrial companies consider productive optimization parameters in which different dimensions are considered, including the territorial nature. Obviously, this process will occur in an unequal manner in the world. In countries like Brazil, which received industrial plants from foreign capital as part of the migration process of manufacturing plants from the center to the periphery during the twentieth century, we

observe nowadays new rounds of capital mobility. However, not in the same way and not for the reasons which allowed them to receive those units in the past.

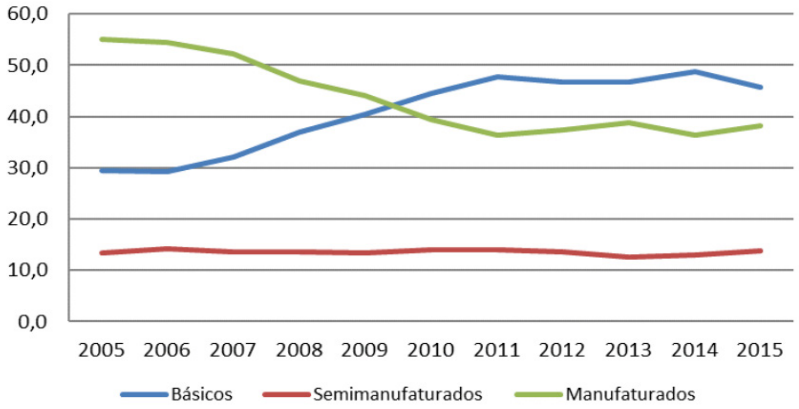
As already discussed by other authors who comparatively analyzed the deindustrialization process in different parts of the world (Palma, 2014; Tregenna, 2009, 2015), in countries like Brazil we have a contradictory process which reinforces our inequalities based on precarious work, outsourcing and the absence of a previous constitution of decision-making centers on capital[5]. Thus, we can affirm that the formation of value global chains leads to uneven (de)industrialization around the world, with parts of the world passing by contexts as advanced industrialization (in the case of China), others passing by transferences of manufacturing plants with the permanence of decision centers (in the case of Western Europe) and others facing the absolute or relative decrease of the industry in their national economies (in the case of Brazil). Thus, we have a movement of progressive reconfiguration of the international work division facing the development of the capitalist relations on a global scale according to the value global chains (Selwyn; Leyden, 2021). This movement reinforces the understanding of the imperialist monopolization in the core of the capitalist development in the twenty-first century.

We believe that this argument may be unfolded by two central points for the actual debate in Economy Geography in Brazil in the twenty-first century: a) the progressive change we need in exports; and b) the expressive increase we had with the presence of imported products in our production process or even with the substitution of end products, an inverse tendency which has occurred in the country since 1930's (ISI). We will argue about this first point on figure 04.

These data, focused on the most recent period of the economy, establish the debate that we want to discuss here. Progressively, for the Brazilian exports, the basic items gained space to the detriment of semi – and manufactured ones. Lamoso's chart (2020) brings us this information by the added value of each general type of exported item. The semi – and manufactured items present, as a rule, an added value which is proportionally much higher than basic items. Thus, as Lencioni (2015, p. 21) argues, the Brazilian economy ends up presenting "a relative terms-of-trade deficit of industrial products compared to *commodities*", so that some of the main items which represent our exports in the global market are products such as sugar, coffee, orange juice, tobacco, meat, chicken and iron ore, that means, items without or with little added industrial value.

5 In general, we avoid some terms which are commonly used by these authors to qualify the deindustrialization, such as premature or precocious. It is because we understand that, taken by their conceptual meaning, may lead to understanding in stages of the capitalist development.

Figure 4 – Brazil: relative participation of exports by aggregate factor between 2005 and 2015



Source: Lamoso, 2020 (data by MDIC).

In this context, it is important to highlight the importance of China in the last years of the global economy restructuring and in the constitution of value chains. the intense and recent development that the Chinese economy has passed presents unfoldings in several forms, i.e.: a) attracting industrial investments, for its low cost workforce associated with a more and more complex technological; b) more and more expressive exports of items with a higher added value; and c) a huge demand for *commodities*, either to supply the growing internal market, or to impulse even more the new investments in a global scale. When we consider these transformations regarding the Brazilian economy, it is clear how the trade relations with China in the last decades are the core of the deindustrialization in Brazil, when, obviously, we observe it in combination with the other arguments brought so far. As Silva (2019) states, the decrease passed by China in the second decade of this century had a decisive contribution on the Brazilian economic balance. It must be a specific object to our future observations, since the Chinese economy has already presented a strong return of growing rates that experienced at the beginning of the twenty-first century, which must once more have unfoldings in the reprimarization of Brazilian exports.

Notwithstanding, we evaluated that a caveat is necessary in this debate. The reprimarization of exports does not necessarily mean *stricto sensu* reprimarization of the national economy as a whole. This way, some points must be included. Firstly, the constitution of huge groups exporting soya, orange juice, sugar etc. are not pure and simply based on primary extraction of items. For many decades, our agriculture has developed integrated processes with the industry, including harmful results associated with the transgenics and the use of pesticides. In other words, the agriculture development in Brazil does not necessarily mean a setback for the industry as a whole, since some of these segments are strengthened by the primary sector (fertilizers, pesticides, bioengineering etc.). Moreover, there is a whole chain around transport and the storage of basic items. We should highlight that it does not mean to conceal the deindustrialization process, so that the relative advances in industry linked to agriculture do not look enough to compensate for the loss in other segments. Furthermore, we have to keep in mind that economics is

politics. Thus, the historical incentives to the agribusiness also have its cost by draining the treasury resources to the detriment of a solid industrial policy in Brazil, focused on sectors with higher capacity of added value on final products.

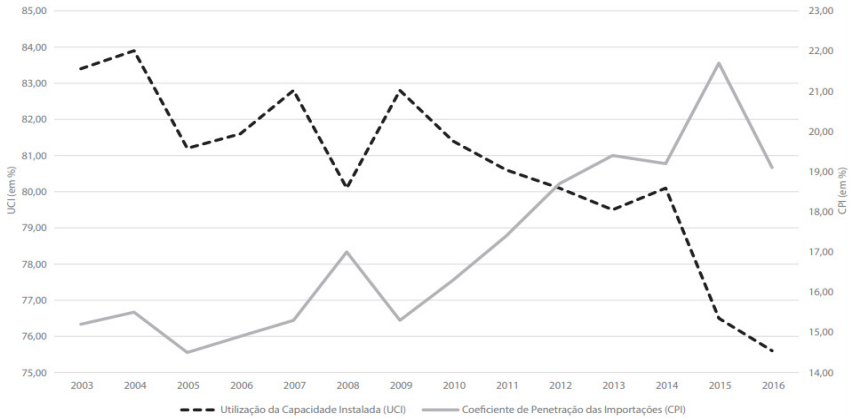
As said before, the debate about reprimarization of the Brazilian economic export agenda is just one of the dimensions we want to deal with in this text when we think about the presence of Brazil in the constitution of value global chains. Another dimension that must be considered is the impressive increase of imported items in our production process or even in the substitution of final items, which can be seen, as a comparative resource, as a reverse of what we have lived in Brazil since the 1930's (import substitution industrialization). As we argued, the national economy in the second half of the twentieth century experienced an important creation process of industrial manufacturing bases that were able to internalize the production of items (final or parts of other production processes) in the Brazilian territory itself. What catches our attention is that recent data have pointed out a reverse in this issue, as Espósito (2017a), Sampaio (2019) e Colombo *et al* (2020b) have pointed out. We evaluate that both of the following figures (Figures 05 and 06) can promote a good scenario to synthesize this argument.

The data brought up by these two figures show the tendencies of changes in the transformation industry in Brazil in the twenty-first century. The decreasing tendency of the installed capacity utilization (dashed line in Figure 05), separately, could indicate only one relative scenario of deindustrualization, since a better optimization of the production process can cause a decrease in this indicator, even more in times of outsourcing and increase of relative exploitation of workforce by technological innovations. However, when we cross this datum with the other two ones, the increasing tendency of penetration coefficient of imports[6] (continuous line in Figure 05) and the increasing tendency of coefficient of imported items[7] (Figure 06), we can have a distinct synthesis. What we effectively have is a progressive increase in imports of the transformation industry in Brazil, in the elaboration of final products or in the supply of the effective demand of the domestic market for specific items. When we consider this situation regarding our trade balance, we obtain negative results in segments such as high, high-medium and low-medium complexities of the transformation industry (Figure 07).

6 This information points out the presence of items produced abroad in our domestic market. At a certain level, with this information it is possible to have a wider view of the capacity loss of the Brazilian industry to supply the demands of the country itself, having the needs for imports. In these cases, the Brazilian manufacturers only pack or add labels to items produced abroad.

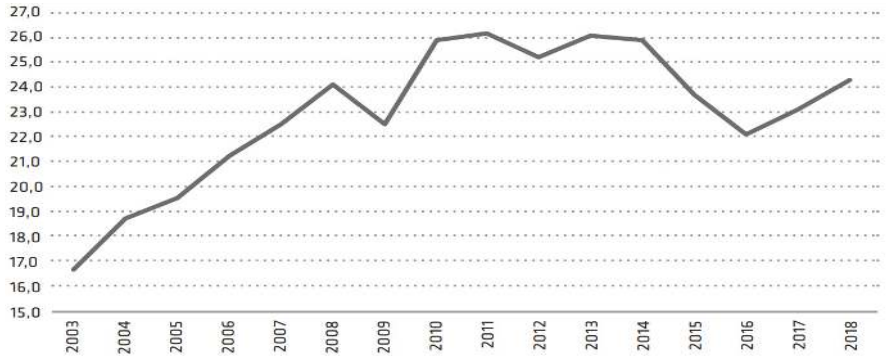
7 This information shows the presence of imported products as end products which are finished in Brazil. This indicator is more and more interesting when we consider the complexity of the global production process, where different parts of the same product are produced in several parts of the world.

Figure 5 – Brazil: use of installed capacity and penetration coefficient of transformation industry imports between 2003 and 2016 (in %)



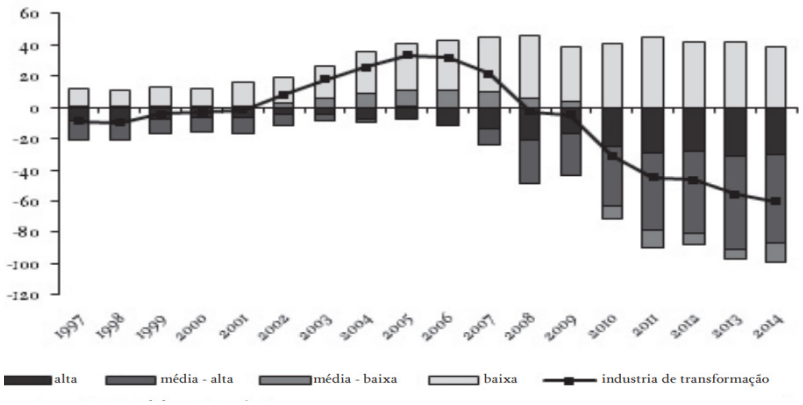
Source: SAMPAIO, 2019 (data from CNI).

Figure 6 – Brazil: coefficient of imported items from the transformation industry between 2003 and 2017 (in %)



Source: Colombo *et al*, 2020b (data from CNI).

Figure 7 – Brazil: trade balance from the transformation industry between 1997 and 2014 (in US$ **billions)**



Source: Espósito, 2017a (data from MDIC).

During the first years of the twenty-first century, we identified the decreasing tendency of the trade balance on the transformation industry in the country. Even with the series presented in figure 07, the items with high and high-medium complexity have always presented negative results in the considered interval, it is important to highlight how this *gap* has increased along the twenty-first century, which reinforces our dependent development character. Associating these data with the export reprimarization issues, it is clear that what guarantee the neoliberal policies of the surplus balance in Brazil in the last decades was the primary sector, which generates a profound cost for the development of the country, based on a low added value, intense dilapidation of the natural resources and the use of items that is in a reverse direction from what we could understand as a project of a less unequal society.

CONCLUSIONS

Along our reflections, we aimed at analyzing the recent dynamics of the Brazilian industry development, considering the debates about deindustrialization and reprimarization of our economy from a trans-scale perspective. Thus, even if we do not extend the theoretical debate to specifically focus on the scale concept, we started by the important contribution by Smith (1988a, 1988b, 2000, 2002) about the theme as the way to set ourselves in the debate. In this sense, we defend the need to consider the production restructuring process of capitalist development based on a reading which considers Brazil as a particularity of global capitalism. We believe that it is not possible to analyze the processes debated here only considering the national scale, as we evaluate that it is not possible to deal with this issue thinking that there are no particularities in Brazil for a process which happens on an international scale.

Notwithstanding, the text presents some limits that, in our understanding, must be supplied by more analyses. Besides the deepening in the scales considered here, we refer to others which were not object of our research, by the dimension of the writing itself. That, however, does not disregard the important reflections that we have already made, specially related to the urban scale (Padua, 2010; Lencioni, 2015) and the regional scale (Lamoso, 2013, 2020; Vasconcelos, 2017; Monteiro; Lima, 2017). The trans-scale reading of the production restructuring process, considering or not the deindustrialization, can help us with a real interpretation of the economic geography of the twenty-first century.

Finally, we reaffirm our perspective that the deindustrialization process in Brazil occurs as part of the totality that is the production restructuring of capitalism on a global scale. By being an imminent, multidimensional and multifaceted process, we can identify its appearances in several forms, which can be as a definite closure of a manufacturing plant as for Ford in Camaçari, to the closure of an accounting sector of a medium-sized company in Faria Lima Avenue in the city of São Paulo, which will, now, opt for the outsourcing of services with conditions that guarantee cost reduction and, therefore, more competitiveness. From the body scale of an unemployed person after decades of work exploitation in an assembly plant in Bahia, to the global value chain scale that redefines

the investment courses in a post-pandemic world, the development of capitalist relations continues its course, sometimes as a creative destruction and sometimes as a destructive creation.

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AUTHOR

LEÔNIDAS DE SANTANA MARQUES – Adjunct Professor at the Federal University of Alagoas - Campus Sertão. PhD in Human Geography from the University of São Paulo (USP), with an internship at the School of Global Studies at the University of Sussex (United Kingdom). Master in Geography from the Federal University of Sergipe (UFS). Graduated in Geography from the State University of Feira de Santana (UEFS). He was area coordinator of PIBID Pedagogy (2014) and management coordinator of PIBID / Campus do Sertão (2014-2018). He was coordinator of the lato sensu Postgraduate course in Education in the Semiarid Region (2016-2018). He is a researcher at the GEPAR Groups (Group of Studies and Research in Regional Analysis), GCEG (Geoprocessing and Cartography in Geography Teaching) and NUAGRARIO (Center for Agrarian Studies and Territorial Dynamics) at UFAL, GPECT (State, Capital, Work and Territorial Reorganization Policies) of the UFS and the Laboratory of Regional Studies in Geography of the University of São Paulo (LERGEO/USP). He is a scholarship professor on the Indigenous Intercultural-Geography Degree Course (CLIND / UNEAL). He is a member of the Association of Brazilian Geographers (AGB), Aracaju Section. He has worked mainly with: rural education; geography teaching methodology; teacher training; development theories; State and public policies.

E-mail: leonidas.marques@delmiro.ufal.br