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CHALLENGES AND PROSPECTS

**EXPORT CONCENTRATION IN A MULTIPOLAR WORLD: AGRI-FOOD
LOCK-IN AND BRICS+ GOVERNANCE IN SOUTHERN BRAZIL**

Roberth Andres Villazon Montalvan (roberthmontalvan@epagri.sc.gov.br)

Rogério Goulart Júnior (rgoulartjr@gmail.com)

Luiz Toresan (toresan@epagri.sc.gov.br)

This paper examines whether the expansion of BRICS into BRICS+ provides genuine alternatives to commodity-dependent agri-food governance structures or reproduces hierarchical South-South trade patterns on an intensified scale. Taking the State of Santa Catarina as a detailed regional case study spanning pre-BRICS membership (2009) through BRICS+ expansion (2024-2025), this analysis documents how trade reorientation toward BRICS markets, particularly China, has narrowed Santa Catarina's agricultural portfolio and deepened commodity lock-in despite BRICS+ commitments to food sovereignty and alternative institutional development.

Empirical evidence reveals a contradictory pattern: Santa Catarina's agribusiness exports grew from approximately USD 5-6 billion (2009) to USD 7.57 billion (2024, constituting 65% of state total exports), yet this growth concentrated in three commodities: pork (USD 1.6B), chicken (USD 2.29B), and soybeans (USD 633M). Simultaneously, Santa Catarina maintains a paradoxical 6 million tonne annual corn deficit requiring imports from neighbourhood states and countries while exporting value-added meat products. This dynamic reveals structural commodity dependence masked by market diversification rhetoric. China's historical market dominance (reaching 25-30% of meat exports in 2022-2023) has declined to 10.96% of total exports (2024) due to trade bans, creating instability that state diversification strategy cannot fully buffer.

BRICS+ institutional innovations fail to address this fundamental commodity specialization. Rather, they optimise the circulation of existing commodities without enabling Santa Catarina to escape commodity lock-in mechanisms, including sunk capital in slaughterhouses and processing infrastructure, labour dependence, among others, that favour meat production. The paper argues that Santa Catarina exemplifies how BRICS+ represents a reformed accommodation rather than a genuine alternative paradigm: it creates South-South institutional mechanisms while entrenching regional agricultural specialization, concentrating market risks in commodity price volatility and geopolitical trade restrictions, and marginalizing food sovereignty alternatives. The analysis demonstrates that despite successful market diversification, Santa Catarina remains structurally unable to transform its commodity-export profile.

Palavras-chave: regional agri-food governance; trade lock-in; market diversification limits; south-south trade asymmetries.