

PODCAST

Uncle Sam and the Magic Beanstalk



By Heewon Park and Noah Gordon

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Uncle Sam and the Magic Beanstalk ...



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The soybean is more than just a humble legume—it's a major geopolitical player that feeds the international meat market, shapes trade wars, and transforms economies. In Episode 4, we tell the story of how the soybeans that feed pigs around the world have shaped the geopolitical behavior of what some call “the Meat Triangle”: the United States, Brazil, and China.

Transcript

This transcript was not edited prior to publication.

HEEWON PARK: The “miracle crop.” The “magic bean.” The “crop of the century.” These are all nicknames enjoyed by one humble legume: the soybean. The average

consumer probably doesn't spend much time thinking about soybeans. Maybe you eat some tofu once in a while, or add some soy milk to a latte every now and then.

NOAH GORDON: But we shouldn't underestimate the soybean. Within agricultural history and global economics, the soybean enjoys a nearly legendary status.

HEEWON PARK: It feeds the international meat market, shapes trade wars between the US and China, and has helped transform Brazil's economy. It's a major geopolitical player.

NOAH GORDON: This is the story of how the soybean has joined forces with beef to shape the geopolitical behavior of what some call "the Meat Triangle": the US, Brazil, and China.

HEEWON PARK: From the Carnegie Endowment for International Peace, I'm Heewon Park –

NOAH GORDON: – and I'm Noah Gordon –

HEEWON PARK: – and you're listening to *Barbecue Earth*.

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NOAH GORDON: Episode 4 — Uncle Sam and the Magic Beanstalk

HEEWON PARK: China, the US, and Brazil are the world's three largest producers of meat, by far. And they all rely on, and are bound together by one commodity: the soybean. This legume can do a lot more than you might think. Here's Noah Gordon, co-director of the Carnegie Endowment's Climate, Sustainability, and Geopolitics Program.

NOAH GORDON: You can do a lot of things with soybeans. You can make biofuels for trucks. You can make vegetable oils for cooking. You can turn them into all sorts of food, from tofu to soy milk. But most soybeans aren't consumed by humans at all.

HEEWON PARK: According to Our World in Data, 77 percent of global soy is used as animal feed, and it goes to livestock in the meat and dairy industry. And

in the US, over 90 percent of the soybeans we produce goes to animal agriculture.

NOAH GORDON: So when you think about it, the meat and dairy industry doesn't *just* consist of the animals themselves, but also all the resources that go into raising them. Sure, these animals have hearts and brains, but in our human food system, cows are really just living "machines" that inefficiently convert soybeans into human food. The soybean is arguably the most important commodity in the world of animal agriculture.

HEEWON PARK: In previous episodes, we've seen how important the meat industry is to countries all over the world, from the U.S. to the Netherlands to Brazil. The soybean, too, is big business.

NOAH GORDON: The USDA says about 10 percent of global agricultural trade by value can be attributed to soybeans and their byproducts.

HEEWON PARK: So perhaps it's no surprise that countries have fought to exert dominance in the world of soybean production. In the last few decades, the US and Brazil have entered a fierce competition over who would feed China's pigs.

HEEWON PARK: For a long time, the US was the obvious leader in this realm and was faced with little competition. America's relationship to soy dates back as far as the 18th century. Here's Matthew Roth, the author of a book called *Magic Bean: The Rise of Soy in America*.

MATTHEW ROTH: In the 1760s, a former British sailor named Samuel Bowen started growing soybeans in Georgia to produce soy sauce. He had been a prisoner in China for a while and claims to have learned at that time the secret of producing soy sauce. So his hope was, when he came back, that he was going into business to sort of crack into the international soy sauce trade, which was dominated by the Dutch at that point.

HEEWON PARK: But Bowen's hopes for soybean farming didn't quite pan out. Throughout the 18th and 19th centuries, the soybean remained outside of the mainstream, and it wasn't an integral part of the US economy. But all this was about to change. Roth explains:

MATTHEW ROTH: The soy industry as it exists today — its rise was very much a

20th century story. So, the soybean industry largely consolidated in the 1930s, spurred by some New Deal programs.

HEEWON PARK: Around this time was when American farmers discovered that the soybean could be incredibly useful to the animal feed industry.

MATTHEW ROTH: Instead of feeding animals or livestock from what you would directly grow on the farm, you'd grow a bunch of hay and then put it in silos for feeding over the winter. And then you'd mix in various nutritional supplements to make it a balanced feed, and soybean protein was a big part of that.

HEEWON PARK: Then, World War II arrived.

MATTHEW ROTH: The fear was that because of scarcities, because of the wartime needs of the army, that meat would become too expensive for the average citizen to eat.

HEEWON PARK: Roth says that in response to this fear of scarcity, the US really expanded its industrial production of meat, and the soybean was a critical part of making this possible.

MATTHEW ROTH: World War Two represents something of a watershed, both for the industrial production of meat and also the use of mixed feeds and the soybean in particular as a key component of that whole process.

HEEWON PARK: By the 1960s, the soybean industry had skyrocketed. It was established as an integral part of the US economy and modern factory farming systems. Farmers continued to produce more and more soybeans. But where was all this American soy going? For a long time, Europe had been the biggest importer, but as the Chinese middle class got richer and hungrier for meat, those beans started heading further east. Gordon explains.

NOAH GORDON: By 2002, China's soybean imports surpassed those of the entire European Union. Today, China imports around 60 percent of the world's total exports.

HEEWON PARK: Clearly, China had become an incredibly important trade partner for the American soybean industry. But rising tensions in U.S.-China

relations were about to throw a massive wrench into this partnership.

AUDIO (CNN): Game on here, trade war between the United States and China is here. It's real. At the stroke of midnight, the US hit China with tariffs on \$34 billion dollars worth of goods. China immediately responded with its revenge tariffs of equal value, accusing the US of launching the largest trade war in economic history, and calling America "trade bullies."

HEEWON PARK: The US-China trade war had begun.

NOAH GORDON: In 2024, U.S.-China trade tensions are mostly centered on high-tech products like semiconductors or critical minerals. But in 2018, one of the first battlegrounds for these superpowers was the soybean. Beijing put tariffs on the American crop that feeds Chinese pigs.

HEEWON PARK: Hongzhou Zhang, a research fellow at Nanyang Technological University's China Program, says that the soybean was of particular importance to the U.S.

HONGZHOU ZHANG: Among Americans' agricultural exports to China, soybean has always been the most significant—the biggest item.

HEEWON PARK: Once China implemented its tariffs, US soybean exports crashed dramatically. Export volumes fell by 74 percent from just 2017 to 2018. Here's Gordon.

NOAH GORDON: This was a big blow to American farmers. They had essentially lost their biggest customer.

HEEWON PARK: Over in China, the government was also searching for ways to deal with this massive loss in U.S. soy supply. The demand for soy products and livestock feed wasn't going anywhere. So China decided to turn instead to another big producer: Brazil. According to Zhang, Brazil was the natural choice.

HONGZHOU ZHANG: No countries except Brazil has the capacity to fill the gaps left by U.S.

HEEWON PARK: Gordon notes that the declining U.S.-China relationship was a major driver of Brazil's meteoric rise in the soybean world.

NOAH GORDON: In 2000, Brazil was exporting fewer than half as many soybeans as the US. But today, in 2024, it has knocked America into second place. It now supplies more than 50 percent of all soybeans traded internationally.

HEEWON PARK: It's clear that China wants to reduce its reliance on U.S. soybeans, just like how the EU wants to reduce its reliance on Russian hydrocarbons. In both cases, it's about diversification of supply and independence from rival powers. Zhang says that in addition to increasing domestic production and diversifying soy imports –

HONGZHOU ZHANG: There has been measures taken by the Chinese government to encourage the animal husbandry sector—the feed sector—to reduce the ratio of soybeans applied in animal feed. There was even very concrete plans on how to do that by the Chinese government.

HEEWON PARK: Zhang notes that food security is no small issue to China.

HONGZHOU ZHANG: Food security is increasingly becoming as important as energy – or perhaps in the long term, even more so – in shaping the country's foreign policy or international strategies. Food is closely tied to the issue of political legitimacy throughout Chinese dynasties and also a very important factor that shapes popularities and support for the Chinese government.

HEEWON PARK: Gordon says that despite how important food security is to China, foreign observers tend to overlook it.

NOAH GORDON: Policymakers will often concentrate instead on energy security. For example, you often hear discussions of how China's enemies could cut off the oil that China imports through the Strait of Malacca, but you don't hear much about how China's reliance on meat and soybean imports affects its national power and its security.

HEEWON PARK: We've seen how the soybean, which often comes from deforested land and helps overheat the planet, has shaped the economies and trade policies of powerful meat-producing countries like the U.S. and China. But how did the soybean, and the meat industry as a whole, become so powerful in Brazil? That's coming up next, after this short break.

AUDIO (Foreign Policy Advertisement): Hi, I'm Ravi Agrawal, host of [Foreign Policy Live](#). Each week I sit down with world leaders and policy experts on the issues that matter most to you. People like Greek Prime Minister Kyriakos Mitsotakis, USAID's Samantha Power, and the former Israeli Prime Minister and Defense Minister Ehud Barak. Whether it's the US-China relationship, the Israel-Hamas War, or the Global South's growing clout, Foreign Policy Live is your weekly fix for smart thinking about the world. Listen and follow us on Apple, Spotify, or wherever you get your podcasts.

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HEEWON PARK: The U.S.-China trade war may have boosted Brazil's soybean industry. But the Carnegie Endowment's nonresident fellow Matias Spektor says that meat—and [beef in particular](#)—has been booming in Brazil for quite some time.

MATIAS SPEKTOR: So the meat industry is at the heart of Brazilian statecraft. Back in the 1950s, Brazil was [heavily concentrated](#) on the coasts. There was very little economic activity of any significance and very little state presence in the inlands of Brazil, and in particular the Amazon.

HEEWON PARK: The Amazon rainforest is *big*. [At nearly 7 million square kilometers](#), it covers around the size of the 48 contiguous states of the U.S. It's an enormous and very dense landscape that's difficult to control. From the 1960s, successive [autocratic governments](#) sought ways to shore up this weakness and [incorporate Amazonian land into the Brazilian political system](#).

MATIAS SPEKTOR: They needed to ensure that there was a way that they could guarantee easy access to these parts of Brazil, which are very heavily forested, and that property laws would be introduced in ways that would [incentivize people to move from the rest of Brazil there](#), given the very [low density population](#), mostly of indigenous people. So the Brazilian dictators at the time introduced [incentives for internal migration](#), mostly bringing farmers from the south of Brazil all the way up to the Amazon, which is in the north, in the hundreds of thousands.

HEEWON PARK: According to Spektor, the way they did this was by granting these [farmers land](#) in the Amazon—a region where the state had little [command](#)

and control capabilities.

MATIAS SPEKTOR: So the transformation of that biome into a cattle-ranching place comes alongside the introduction of new laws for property rights, but also the violation of these laws and the creation of illegal markets. So from the get-go, you get land grabbing activity on the part of private actors.

HEEWON PARK: These autocratic regimes started to build roads in the Amazon as part of their project of integrating the region to the rest of the country.

MATIAS SPEKTOR: But then in order to ensure that that part of Brazil is deeply integrated into the political economy of the country, you need economic activity. And that's when farming begins and very slowly, cattle ranching. So Brazil, starting in the '50s, develops a massive, highly productive meat industry centering in the farmlands—either inside the Amazon biome or around the Amazon biome—that slowly transformed Brazil into one of the largest meat exporters in the world, competing in particular with the United States.

HEEWON PARK: The meat boom in Brazil reflected consumption trends around the world: the average human eats nearly twice as much meat now in 2024 as in 1961. And Spektor says this affected not only Brazil's economy but also its culture.

MATIAS SPEKTOR: Now, as that part of Brazil becomes wealthier, it becomes politically more relevant and politically weightier. So that's the equivalent to America's Texas. These farmlands are now up and coming. They're super modern. They are the wealthiest, the fastest growing parts of Brazil in GDP. There's a cowboy culture that has become ever more powerful. Sertanejo, the music that you hear from those parts of Brazil, is now hegemonic in clubs, not only in that part of Brazil but around Brazil. Brazilian gangsters listen to sertanejo in hordes. And the culture of contemporary Brazil has been shaped to a very large degree by these regions where meat production is all the rage.

HEEWON PARK: And as the meat industry grew, so did illegal deforestation in the Amazon. Even for those Brazilian governments that have tried to prevent this, the Amazon's landscape has made this no easy task. Gordon and Spektor explain.

NOAH GORDON: So when the current Lula administration arrived in office, they found out that there were over 1,200 unregistered airstrips in the Amazon.

MATIAS SPEKTOR: And one of the problems is, how do you get rid of these? One way to do it is to bomb them from the air. But they found out that when they do, within three days, they get rebuilt.

HEEWON PARK: So the vastness and unruliness of the Amazon presents an enormous challenge to Brazil's government in enforcing environmental regulations on animal agriculture. But there's also another reason: the political power of the meat industry. I spoke with Suely de Araújo, who headed the Brazilian Institute of Environment and Renewable Natural Resources, or IBAMA, from 2016 to 2018. IBAMA is a federal agency, similar to the EPA in the US. Araújo remembers experiencing the influence of the meat industry firsthand.

SUELY DE ARAÚJO: *Eu lembro especificamente da cadeia da carne de uma reação muito grande a uma operação de fiscalização, em que nós pegamos vários frigoríficos grandes, inclusive empresas como a JBS, e fizemos uma mega operação exatamente exigindo a demonstração da origem do gado. O gado não pode vir de fazendas que estão com ilegalidade ambiental ou de áreas irregulares, como terras indígenas, a invasão de áreas protegidas. O IBAMA fez uma grande operação quando eu estava lá e em poucos dias determinou o fechamento de várias unidades desses frigoríficos grandes.*

EMILY HARDY (ENGLISH TRANSLATION): I specifically remember a huge reaction to an oversight operation IBAMA conducted on the meat supply chain. We took several large slaughterhouses, including those of companies like JBS, and carried out a mega operation demanding exact demonstrations of the cattle's origins. Cattle cannot arrive on farms that are environmentally illegal or from irregular areas, such as indigenous lands or protected areas that have been illegally invaded. IBAMA carried out a major operation and within a few days, it resulted in the temporary closure of several units for these large plants.

HEEWON PARK: In response, the meat industry leaped into action.

SUELY DE ARAÚJO: *A reação foi gigantesca mesmo, muito rápida, com decisões judiciais derrubando a nossa atuação. Esses grandes frigoríficos, eles usam advogados muito poderosos, muito conhecidos, escritórios muito conhecidos, caríssimos, né? Houve uma movimentação política enorme, enorme, enorme. E eu passei dias recebendo telefonemas o tempo todo, com críticas e em tom de ameaça, não importa de quem.*

EMILY HARDY (ENGLISH TRANSLATION): The reaction was really gigantic and very quick, with court decisions overturning our actions. These meatpacking companies are so big. And they use very powerful, well-known lawyers, very expensive firms. These people have enormous influence in [the] National Congress. And there was a huge, huge political movement. And I spent days receiving phone calls all the time, with criticism and threatening tones.

HEEWON PARK: This means the Brazilian meat industry has a lot of influence over agribusiness overall. And agribusiness is a powerful political player. Araújo and Spektor explain.

SUELY DE ARAÚJO: *Hoje nós temos uma indústria enfraquecida. A industrialização no país já foi muito importante, hoje está sem força e um pouco refém do agronegócio.*

EMILY HARDY (ENGLISH TRANSLATION): Today we have a weakened industry. Industrialization was once very important to the Brazilian economy, but today, it is without strength. It is somewhat hostage to agribusiness.

MATIAS SPEKTOR: Because meat has become such an enormous source of GDP growth, meat producers have managed to capture Brazilian politics in ways that are really quite remarkable. The meat industry has representatives across the board. Its companies are some of the most powerful and influential private sector players in Brazil.

HEEWON PARK: As of 2023, the agribusiness lobby controlled almost 60% of seats in Brazil's Congress. You can see this political influence playing out in Brazil's past administrations, regardless of their party affiliation. Just consider Brazil's current president Lula da Silva, who is known as a climate progressive.

MATIAS SPEKTOR: So Lula came to power originally 20 years ago on the back of a political coalition which included the Green Party of Brazil and activists from the Amazon who had resisted the expansion of state presence in the Amazon through cattle ranching and all sorts of other activities that were normally coercive, involving a lot of political violence against indigenous populations. So Lula's identity and his party's identity is very much enmeshed with the environmentalist movement that grew up in Brazil in the late '70s and early '80s resisting dictatorial rule. So when he arrives in office, he has these powerful

figures in his cabinet that sort of embody the pro-climate policies that the left had heralded for many, many years.

HEEWON PARK: But Spektor says there was another side of Lula's political ambitions.

MATIAS SPEKTOR: And yet at the same time, Lula embodies the fast, modernizing, industrializing side of the Brazilian political spectrum. And that involves all of these interest groups that had a stake in expanding the extraction of oil, for example, and the production of gas and the generation of electricity via these massive power plants on rivers, sometimes involving the changing the course of the river with a lot of negative consequences for the environment.

HEEWON PARK: From the beginning of his first term in 2003, Lula had to reconcile these two groups—the environmentalists and developmentalists—within his own administration.

MATIAS SPEKTOR: At the beginning, he introduced legislation that was really quite advanced and command and control measures that made deforestation rates plummet very dramatically. And this was heralded as an enormous success. But lo and behold, the minute the environmentalists clashed with what we call the developmentalists, the minute that clash took place, Lula made a choice, and he chose the developmentalists at the expense of the environmentalists who left government. And then deforestation rates slowly but surely began to climb up again.

HEEWON PARK: In 2011, Dilma Rousseff took over from Lula and showed even more deference to agribusiness. Under Rousseff, deforestation rates grew and agribusiness gained more power in government. Gordon says that one of her more controversial moves was the revision of something called the Forest Code.

NOAH GORDON: The Forest Code is a 1965 law that limits how much forest rural landowners are allowed to cut down. But agribusiness interests have fought this code for a really long time. They argue that it "hinders [Brazil's] development" and slows down economic progress.

HEEWON PARK: Lobbying groups have pushed to increase the percentage that landowners are allowed to deforest, used loopholes to get around existing limits,

and even pushed to get rid of the Forest Code entirely.

NOAH GORDON: In 2012, agribusiness had reason to celebrate, because the Rousseff administration revised the Forest Code. The government relaxed some limits on deforestation and even forgave some past violations.

HEEWON PARK: Environmentalists feared deforestation would now increase again. And they were right. In fact, two years later, Rousseff appointed a controversial new agriculture minister. Her name was Kátia Abreu. Critics often called Abreu the “chainsaw queen” and “Miss Deforestation” for her promotion of agribusiness interests at the expense of the Amazon and the environment.

HEEWON PARK: But as critical as environmentalists were of Rousseff, the 2019 election of former president Jair Bolsonaro would turn out to be their worst nightmare. During Bolsonaro’s administration, Amazon deforestation escalated dramatically. Spektor explains.

MATIAS SPEKTOR: Bolsonaro basically suspended a lot of the command and control activities. He publicly encouraged illegal activity in the Amazon. He tried to change the law but couldn’t to try and relax existing regulations.

HEEWON PARK: Under Bolsonaro, agribusiness benefited heavily. The U.S.-China trade war helped, too. As China increasingly turned to Brazil for its soybean imports, Brazilian soy farmers profited immensely.

MATIAS SPEKTOR: China does not have the arable lands to produce its own beef. It needs to import it from elsewhere, and Brazil’s found that niche.

HEEWON PARK: Although the bulk of Brazilian meat goes to domestic consumption, Brazil is now a major exporter of beef as well. And the majority of its exports go to China. According to Spektor, the expansion of Brazil and China’s soybean and beef trade has led to significant and unexpected geopolitical transformations.

MATIAS SPEKTOR: The role of meat and beef in Brazil’s politics is a story of the rise of China in the Western Hemisphere—is a story of the relative decline of U.S. influence in Latin America, as the Chinese consumer market for protein has become incredibly powerful. Of course, in the case of Brazil, this means not only

meat and beef, it also means soya beans. So Brazil as a protein exporter is the dominant story of the changing political landscape of the Western Hemisphere, in many respects.

HEEWON PARK: One aspect of this changing global landscape is that China and Brazil's economies have become more interdependent. Both countries now have higher stakes in maintaining good relationships with each other, and this has impacted Washington's relative influence in the Western Hemisphere.

MATIAS SPEKTOR: The rise of China as a meat consumer and the rise of Brazil as a meat exporter has brought Beijing and Brasília together in ways that were really unexpected in the past. This is a new phenomenon for the United States. The United States has traditionally seen the Western Hemisphere as its regional hegemony. There hasn't been any extra regional major powers in the Western Hemisphere operating in any detectable way since the end of the Cold War and the Soviet Union's collapse in Central America. And now, all of a sudden, U.S. officials realize that China has diplomatic muscle and a lot of political perches.

HEEWON PARK: So the meat industry has led to these geopolitical shifts. Gordon says the importance of beef also shapes the behavior of these "carnostates", if you will, in global climate fora.

NOAH GORDON: Beef and pork are carbon-intensive products so important that they tie countries together—it's a bit like how oil binds the US and Saudi Arabia. You know, we're familiar with how fossil fuel interests obstruct climate talks. It took 28 COPs for the nations of the world to say, finally, that they should gradually transition away from fossil fuels.

HEEWON PARK: But Gordon explains that we see meat interests doing the same thing.

NOAH GORDON: Greenpeace got ahold of some documents from talks at the Intergovernmental Panel on Climate Change. They exposed how Brazil and Argentina had pushed to delete language about how eating less meat would be good for the planet. And recent reporting from The Guardian has also revealed how researchers at the UN's Food and Agriculture Organization felt pressured to play down the link between cows and climate change. They felt their work on methane emissions was being censored.

meat emissions was being censored.

HEEWON PARK: Today, in 2024, Bolsonaro is gone, and his successor Lula has restored many of the environmental regulations that were dismantled in the Bolsonaro administration. But even so, Spektor says that the future of Brazil's environmental policy is still very much up in the air. Lula is still having to balance his conflicting environmentalist and developmentalist ambitions. And Brazilian society doesn't seem to want to give up meat any time soon.

MATIAS SPEKTOR: Meat production in Brazil, as in America, is enmeshed with national identity. It's a source of pride. It's something that the Brazilian lower classes aspire to. Eating protein in the form of meat is one of the markers of social status in a country where so many of the inhabitants are either poor or very poor. Any talk of transitioning away from meat meets immediate backlash. The culture of the cowboy is alive and well, and it's expanded. It's far more prominent now than it was 20 years ago. The big exporting meat packing companies are seen as national champions.

HEEWON PARK: And while many European countries have criticized Brazilian deforestation, they've also been happy to continue buying their soybeans and adding to the problem. It seems that right now, meat remains king. But will it always have the crown?

HEEWON PARK: Coming up next in Episode 5, we turn to the past and ask what we might learn from the story of the lobster and its transformation from disdained prison food to fine-dining delicacy. Then, we look to the future to imagine a world less centered around traditional meat production. From the Carnegie Endowment for International Peace, I'm Heewon Park –

NOAH GORDON: – and I'm Noah Gordon –

HEEWON PARK: – and you've been listening to *Barbecue Earth*.

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HEEWON PARK: This episode was written by Noah Gordon and me, Heewon Park, and produced by me with assistance from Emily Hardy, Daniel Helmecki, Tim Martin, and Zachary Mills. Music was composed by me and artists on Pixabay, Pond5, Creative Commons, and Artlist. Legal review was done by Korieh Duodu

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