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The logo for the International Institute of Social Studies, featuring the word "Erasmus" in a stylized, cursive script.

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**Labour security and agency within the Orange Juice Value Chain  
(OJVC) in Brazil**

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## **Abstract**

Current literature is unclear about how highly governed (i.e. more coordinated/ integrated) value chains may influence the level and chance of improvement in workers' conditions (e.g. levels of security and voice). This research evaluates and considers labour outcomes (i.e. levels of security and voice) within the Brazilian Orange Juice Value Chain (OJVC). The OJVC in São Paulo, Brazil, is an "old", vertically coordinated chain that delivers, via three large firms - Cutrale, Citrosuco and Louis Dreyfus Commodities (LDC) - a vast proportion of the world's orange juice.

The methodology used in this research applies indicators of security to various workers (on farms; at factories; for local/regional transporters and in the port) as well as a model of identity to the different unions operating across this chain. A typology and rank of orange chain workers are made based on findings in terms of these indicators. This paper centres on the concept of labour agency as a means to understanding the impacts of value chain inclusion on labour security and voice.

The mapping of worker's levels of security shows labour outcomes as both difficult and varied in form and cause but also that crucial (final) transport workers have considerably better chances for upgrading their conditions. Labour outcomes are also related to unions, which may have space to embark on new local strategies and alliances, if they so choose. Looking at labour identity through identity analysis also shows the problems unions and workers have balancing local level specifics of representation with their "need" to forge global alliances, particularly within chains. Finally, the paper illustrates the value of grounding studies of labour security and agency at the intersection of (highly political and hierarchical) vertical chains and horizontal, local processes of labour control, as suggested by Global Production Network protagonists.

## **Keywords**

Oranges, GVCs, Brazil, labour, unions, multinationals, logistics.

# Labour Security and Agency within the Orange Juice Value Chain (OJVC) in Brazil<sup>1</sup>

## 1 Introduction

Reduced demand and the concerns of consumers regarding sustainability have changed the consumption of orange juice worldwide. However, while the health benefits of orange juice are a mainstream topic, labour rights and conditions in value chains remain under-researched. The focus of this paper on labour conditions and employment relations in the Orange Juice Value Chain (OJVC) helps to fill this gap. In particular, it considers orange juice producers from São Paulo, Brazil, the leading exporters worldwide, and puts them and labour conditions in their chain in the spotlight.

In the literature, studies show that value chain insertion influences labour outcomes, and can be problematic, especially for workers at source. Labour outcomes are conditions, resulting from their work in the OJVC in this case. The two central labour outcomes in this paper are *security* and *voice*. Security relates to work/tasks, livelihood-survival, the labour market and representational security. To measure representational security, we compare static measures of representation, a dynamic view of union identity and workers views of those organisations' representative power. Representation, in the analysis, has two perspectives: from the unions themselves and from the workers' point of view. From workers' perspective, representation is measured by freedom of association, presence of union at the workplace and participation of workers, and knowledge of and satisfaction with the union. From the unions' perspective, representation is measured taking into consideration a particular model of union identity, considering its interests, agenda, levels of representativeness within their category, their territorial coverage, their access and presence in the workplace, and their levels of coordination and organization with other unions and organizations, horizontally and vertically, at national and international level. Security and voice improve the contextualized picture of workers notional and actual level of agency.

To contribute to the value chain and labour literature, the central questions of this paper are: how does working in the OJVC influence labour security and agency? Does Brazilian OJVC dominance impact labour differently in farms, factories and ports? An essential element to answering these questions is the definition of power. We understand power as multifaceted, explicit and implicit, and taking a vertical (in the chain/governance structures) and a horizontal dimension (social custom, practice and rules). The methodology follows a qualitative logic and uses the case study of the OJVC to look at work relations in different parts of the chain (from farm - to truck - to factory - to truck - to port), based on direct field observations from 2012 to 2014, interviews with workers and unions, literature review, and descriptive statistics.

The analysis shows that each group of workers along the chain seem to face different levels of security and representational conditions. Transport workers between factory and port and at the port/export exit point (i.e. crucial workers to the chain drivers) encounter better conditions

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Much of the secondary and primary data and presentations behind this paper were carried out within the GOLLS (Governance of Labour and Logistics for Sustainability) project of ISS-EUR (2011-2016). Updates of data and more recent writing has been funded by the ISS-EUR Brazil Plan (2019-23), more specifically the ISS RIF project on the orange (Sao Paulo) & Soya (Amazonian) chains, entitled “Global Commodity Traders and Civic Action for Social Sustainability” (2019). Further work on chain impacts and the territorial strategies of chain drivers is in progress based on this work.

than the other groups. Relatedly, oligopolistic control of the orange juice sector (in Brazil and globally) has increased. This situation has forced many farmers off their land, led to squeezes on material conditions for workers, as well as made labour outcomes dependent on the whims of global decisions on commodity trade. The continuation of a municipal based union coverage model and lack of resources keep unions fragmented and more vulnerable to employer power. In this context, the state is ambiguous at best – it offers some support to labour and small-scale farmers. Yet, it also underwrites the union system, funds further farm aggregations, promotes the agro-industrial effort and sponsors transport and port liberalisation. The geographic movement of orange production to other parts of São Paulo state has devastated local communities and reduced worker representation. Opportunities for labour to exercise power at a structural, institutional or coalitional level seem minimal.

The structure of this paper follows a thread from theoretical to empirical. In section 2, we raise the discussion of labour and value chains, paying particular attention to issues, such as (1) labour conditions, (2) representation (voice) challenges, and (3) union identity. In section 3, we present the case study (actual orange juice value chain) and labour conditions (tasks, voice and security) within it. In section 4, we explore union representation and the nature of union identity across the chain and for the different labour groups. The conclusion reflects back on the relation of labour conditions to the governance structure of this chain.

## 2 Labour in Value Chains

### 2.1 Labour outcomes and voice/representation in Value Chains

Policymakers often assume positive outcomes of firm upgrading for the quantity and quality of employment in GVCs. The GVC perspective frames its analysis on relations (economic, logistics, power and other) between production processes, from raw materials to final consumers (Gereffi & Kaplinsky, 2001; Kaplinsky *et al.*, 2002; Knorringa & Pegler, 2006). Within this context, systems of governance (i.e. the coordination of a chain) and command and control of labour processes are a way of analysing GVCs. On the labour side, outsourcing (input and output) mechanisms are relevant in explaining worker's security and wellbeing (Cowling & Sugden, 1993; Knorringa & Pegler, 2006). However, requirements in global production often push for more flexibility, new forms of control and prolonged workloads, which means that most of the time workers and small producers face insecure and precarious labour conditions (Knorringa & Pegler, 2006).

GVC literature mentions crucial factors, such as firm upgrading<sup>2</sup> and formality status as relevant to outcomes for workers. Frequently, the higher the level of chain insertion, the more likely workers can expect decent work<sup>3</sup> (Barrientos et al, 2010; 2018; Gereffi & Lee, 2018; Pegler, 2009). Similarly, the higher the regularity, the better can be labour standards and security at work. Formality (e.g. workers formally registered in the Brazilian legal system and thus benefiting from rights such as paid vacation and maternity leave) also influences collective and individual rights, the chance of participating in unions, and worker agency (Barrientos et al., 2010; 2018). Besides these factors, issues such as corporate social responsibility (CSR), codes of conducts, standards, national and international regulations might bring about positive outcomes for workers, leading to “*Responsible Production*” (Nadvi, 2019; Pegler, 2009). Core, final product and key suppliers' workers are also more likely to experience these benefits (Knorringa & Pegler, 2006). In turn, irregular workers may exhibit low attachment to work due to insecurity of income and social protection, being objects of outsourcing and temporary contracts, especially in seasonal and agricultural production. National and international regulations may also influence labour outcomes. Most value chain studies point to the importance of legal rules as a useful manner to improve workers' conditions, despite the internal governance structures of the chain (Barrientos et al, 2010; 2018; Seuring & Muller, 2008).

In many cases, participating in GVCs does not come as choice, but as a matter of survival and necessity (Alford, Barrientos & Visser, 2017; Barrientos, 2001; Chen, 2006; Dolan, 2004; ILO, 2002; Philips & Sakamoto, 2012, Pegler, 2009). Consequently, being included in value chains might not automatically mean benefits, such as economic and social upgrading for firms and workers (Alford, Barrientos & Visser, 2017; McGrath, 2013). This situation may be aggravated as, in developing countries, workers are often at lower levels within the chain, dealing with low value-added products and with little influence in chain coordination.

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<sup>2</sup> According to Barrientos, Gereffi and Rossi (2010, p. 6), “Upgrading has been identified as a move to higher-value added activities in production, to improve technology, knowledge and skills, and to increase the benefits or profits derived from participation in GPNs” (quoting Gereffi, 2005, p. 171-175).

<sup>3</sup> According to the International Labour Office, decent work “involves opportunities for work that is productive and delivers a fair income, security in the workplace and social protection for families, better prospects for personal development and social integration, freedom for people to express their concerns, organize and participate in the decisions that affect their lives and equality of opportunity and treatment for all women and men” (ILO, 2019b, online).

Bound by immediate needs, they have little opportunity for choice and accept what is available, a behaviour that may hinder their agency in the long run (ILO, 2002; Kantur et al. 2006; Wood, 2000). Rather than increasing their livelihood strategies and opportunities, participation in GVC can be a mechanism which traps the most vulnerable actors in poverty, reinforcing their vulnerabilities (Alford, Barrientos & Visser, 2017; Phillips & Sakamoto, 2012; Selwyn, 2019).

Strategies employed by companies, such as flexibility, the use of seasonal workers, and a more global spread of production, are challenges to the so-called social dialogue pillar of ILO's Decent Work concept. New ways of control, new career schemes, and pressures for increased productivity create new challenges for unions and other representative bodies. Increasing workers' voice through direct participation or workers' organizations may be crucial in manoeuvring and attempting to address vulnerabilities and GVC constraints, and a way to strengthen their agency and empower workers. Besides traditional paths, workers might benefit from engaging in private governance mechanisms through partnerships between unions, NGOs and companies (Riisgaard, 2009). Nevertheless, such strategies may also lock workers into helping a productivity focus more than it promotes labour rights and conditions. Keeping in mind the possibility of such ambiguous outcomes for labour from engaging in GVCs and firm strategies (such as Human Resources Management or CSR), the next section delves more deeply into the issue of representation.

## 2.2 Representation challenges and union identity in GVCs

As in any political instance, GVC governance structures present spaces that allow contestation by social agents, through a range of mechanisms, organizations and strategies, such as the transformation of structural into associational power (Selwyn, 2012 – see also Silver, 2003; Wright, 2000) or solidarity amongst workers in different locations (of GVCs) (Castree et al., 2004). Worker's struggles are multi-scalar (Munck, 2008; Tufts, 2007; Cumbers, Nativel & Routledge, 2008) and transnational (Evans, 2010; Burawoy, 2010), i.e. TNC-centered networks and Global Union Federations (Fitcher & Sydow, 2012; Riisgaard & Hammer, 2011). In this sense, many authors (O'Neil et al., 2016; Kaufmann, 2016; Anner, 2007, Riisgaard & Hammers, 2008; 2011, Pegler, 2003, etc.) see increasing workers' voice as an important way to address vulnerabilities and constraints GVCs might impose. Worker-driven networks, such as the Fair Food Program (Fair Food Program, 2019) and labour-centred paths of social upgrading (Gereffi & Lee, 2014) appear as a result of those voices, for example. Either through direct participation or organized bodies, these initiatives allow workers to present their needs and desires, fostering their empowerment. However, instead of increasing the number and effectiveness of workers' organizations, in the past few years we have witnessed a sharp fall in the level of unionization in most countries (OECD.Stat, 2019; Rodrigues, 2009; Pegler, 2009). In addition to several structural reasons – such as changes in production strategies, gender shifts in the labour force, and technological change – the relevance and connection of unions to workers' needs are a necessity in the struggle for positive outcomes for labour.

The effectiveness of unions and workers' representation involves many aspects. The history and level of organization of labour unions have a crucial role in determining their abilities to build networks, strategies and campaigns, not only at the national but also at the international level (Anner, 2007; Riisgaard & Hammer, 2008). Furthermore, unions' internal structures are essential in advocating national and local regulations to the benefit of workers, despite the (often contradictory) internal governance structures of the chain (Seuring & Muller, 2008). Besides traditional paths, workers might benefit from engaging in private governance

mechanisms, through partnerships between unions, NGOs and companies. In addition, according to Riisgaard (2009), the increasing awareness of consumers in Northern countries has triggered the implementation of private social standards and codes of conduct. These are voluntary initiatives, which demand minimum social standards from selling companies and also from suppliers. While these standards seem like a positive way to improve participation and the role of unions, codes and new management strategies may complicate the role of unions in defending worker's rights – mainly in their focus and strategy (Pegler, 2009). In fact, private social standard schemes may even reduce the voice of local producers and workers (Cheyns & Riisgaard, 2014; Cheyns, 2014).

Another important point is the fact that GVCs involve different types of workers and economic sectors, incorporating various unions along the chain. For example, food products involve agricultural, factory, transport and other workers, which are represented by different unions. Considering that most production nowadays is processed, and that value is added at different nodes of chains around the world, deeper coordination of unions along the chain becomes a new, useful and necessary aspect of GVC participation for unions. Furthermore, the success of labour unions in achieving higher working conditions and improving labour rights is also dependent on issues of governance - i.e. buyer-driven vs producer-driven governance structures<sup>4</sup> of chains (Gereffi, 1994) - and on broader institutional contexts, such as socio-environmental relations, social and gender norms, and national, local and international regulations (Riisgaard & Hammer, 2008).

Chain drivenness involves the capacity to transfer standards along chains. The more hands-on and the higher the explicit level of drivenness, (more usual in a producer-driven chain), the easier it is for unions to use traditional forms of mobilization in the workplace and apply pressure for regulations such as International Framework Agreements (IFA) or ILO norms. Buyer-driven chains usually give less room for conventional mobilization, due to the greater separation of power from the place of production. For this reason, most initiatives for private social governance are in this (buyer) type of chain. The visibility and reputation of companies to final consumers also facilitates the creation of partnerships of solidarity with pressure groups and the success of campaigns (Gereffi 1994; Riisgaard & Hammers, 2008; Seuring & Muller, 2008; Levy, 2008).

Still, the relation between economic upgrading of firms and social upgrading of workers might be uneven. Economic upgrading does not necessarily lead to social upgrading and might even worsen the risk of downgrading of workers (Barrientos, Gereffi & Rossi, 2011; Pyke & Lund-Thomsen, 2015). Other variables better increase (although do not guarantee) social upgrading chances, such as governmental legislation and regulation, independent union representation, multilateral initiatives (i.e. OECD guidelines), initiatives at the company level (i.e. codes of conduct), and policies (monetary, fiscal, labour) (Barrientos, Gereffi & Rossi, 2011; Pyke & Lund-Thomsen, 2015). The State is not a neutral actor in the process and might, on the one hand, directly change social conditions in national contexts. Finally, pathways of social upgrading might vary<sup>5</sup> and perhaps a “synergistic governance” among paths is the best way of promoting social upgrading in GVCs through more proactive CSR strategies (Gereffi & Lee, 2014).

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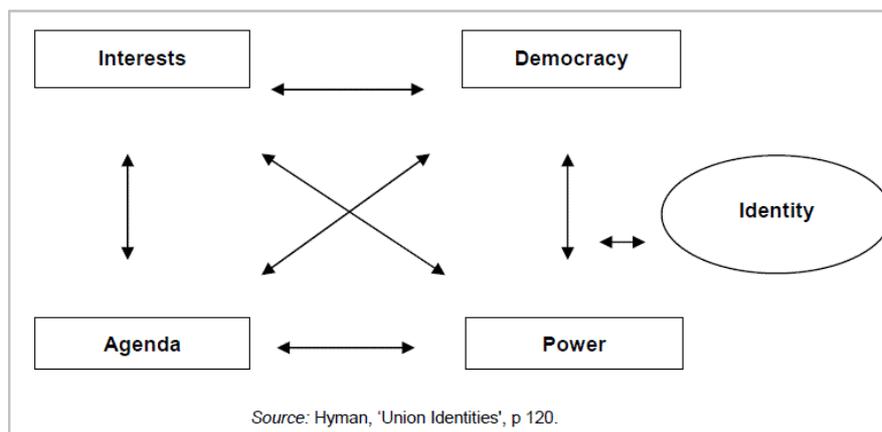
<sup>4</sup> The governance structure of buyer-driven chains includes decentralized production, lower wages and other forms of organizational flexibility. The governance of producer-driven commodity chains includes a higher control of the production system, operation strategies, and risk management of supply chains.

<sup>5</sup> According to Gereffi and Lee (2014), pathways for social upgrading include: market-driven path, CSR-driven path, multi-stakeholder path, labor-centered path, cluster-centered path, public governance path.

Although there are many aspects that influence the effectiveness and relevance of unions and other workers' organizations as a tool to provide positive outcomes for labour, none of them explicitly approach identity as central issue. To analyse the effectiveness of workers' organizations at the OJVC, we use what we call a Union Identity Model based on Hyman (1994) Organisational Identity Model (Figure 1) and on the ideas of Pegler (2003; 2009), Scherer (2007) and Kantur et al. (2006). This composite Identity Model is based on four main components:

1. **Interests:** this component deals with who are organization's interest addressed for and to what type of issues it is interested in. Whether organizations can include active workers, retired workers, unemployed, or include broader interests such as gender issues or environmental perspectives and still be able to represent all this range of interests.
2. **Agenda:** Agenda is related to the "formal policies and constitution (...) [and] the priorities evident from its day to day actions – its real/revealed agenda" (Pegler, 2009: 11). The agenda can be broad, narrow, more collaborative or combative to employers and so on.
3. **Democracy:** it involves the degree of members' participation in its structure. Furthermore, it involves whether the organization searches to respond to workers' needs, interpret their demands, is open to participation, including elections and beyond such static measures. The original model did not use such dynamic aspects of power, but we believe that it shows the level of engagement of representatives and members as a two-way process.
4. **Power:** deals with broader, environmental aspects, such as resources availability, governmental regulations, coalitions, alliances, social relations and so on. These aspects are related to the organization's 'power to effectively represent its members' interests (i.e. its effectiveness).

**Figure 1**  
**The Organisational Identity Model**



Source: (Hyman 1994 p. 120).

To this model, we add the representation component that can be observed from two perspectives: from unions and from workers. As such, from workers' perspective, representation is measured by freedom of association, the presence of a union at the workplace, the participation of workers, and workers' level of knowledge about and

satisfaction with the union. From the unions' perspective, representation is measured taking into consideration the model of union identity in addition to other aspects such as the levels of representativeness within their category. That is, their territorial coverage and the share of unionized workers. Besides, their access and presence in the workplace (Freedom of union action) and their levels of coordination and organization with other unions and organizations (horizontally and vertically, at national and international level) also play a role. Recognition and effectiveness are also related to internal divisions and the fragmentation of unions, which may weaken their bargaining power towards employers. Table 1 summarizes the indicators for representation.

**Table 1**  
**Representation Indicators**

| <b>INDICATOR</b>  | <b>DESCRIPTION</b>   |
|---|--|
| <b>Freedom of association<br/>(Workers perspective)</b> | Existence of union<br>Ability of workers to unionize<br>Willingness of workers to unionize |
| <b>Representativeness<br/>(Unions perspective)</b>      | Share of workers unionized and associated<br>Territorial coverage                          |
| <b>Freedom of union action<br/>(Unions perspective)</b> | Access to workplace<br>Presence at workplace   |
| <b>Effectiveness and recognition of union</b>           | Workers' knowledge about union<br>Workers' satisfaction with union                         |

Source: elaborated by the authors based on Scherer (2007) and Kantur et al. (2006).

The following sections analyse work and representation in the OJVC in Brazil. First, we introduce general aspects of the chain at global and national levels.

### 3 The Orange Juice Value Chain & case study

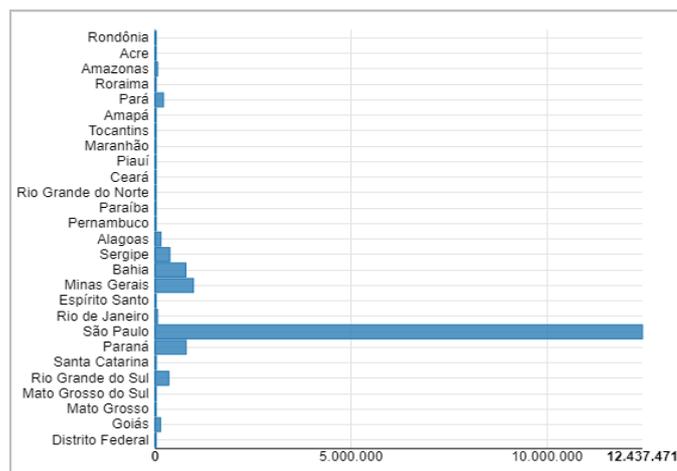
#### 3.1 General aspects

The OJVC is extremely concentrated, in most of its aspects, and recent changes in the chain have even increased concentration levels, leading to a reorganization of the chain. Although orange juice is still one of the most consumed juices in the world, Brazilian orange juice exports have been falling over time (Lopes, 2019c). Sales decreased 17% from June 2018 to May 2019 (870,3 thousand tons of concentrated and frozen products) and revenues decreased 16% (US\$ 1,6 billion) (Lopes, 2019c). These two features (concentration and a falling demand trend) probably help to explain why Cutrale also took a strategic decision (along with Safra) to diversify and buy 84,46% of Chiquita Brands stocks (in the banana GVC) through the *joint venture* Cavendish Acquisition Corporation (Pressinot, 2015).

Geographically, Brazil and the US concentrate the bulk of production, which is aggregated, shows that production is mainly found in four states of the two countries: Florida and California in the US, and São Paulo (SP) and Minas Gerais (MG) in Brazil– the so-called Citrus Belt. Figure 2 shows the extended citrus belt in Brazil. Brazil's orange juice exports account for over three quarters of total world exports (USDA, 2019). The country ranks as the main producer and exporter of orange juice worldwide (Ministério da Agricultura, Pecuária e Abastecimento, 2019). São Paulo alone accounts for 75,3% of national production of oranges in tons, in 2019 (IBGE, 2019).

Around 89,61% of Brazilian orange juice production is exported<sup>6</sup>, while fresh oranges correspond to only 0,28% and sub-products to 10,06% of exports (CitrusBR, 2019). Due to this figure, Brazil owns a global market share of 85% of orange juice exports, corresponding to around 50% of total orange juice production in the world (Neves et al, 2011; CitrusBR, 2012). Currently, main destinations of Brazilian frozen concentrated orange juice (FCOJ) in millions of US\$ are the European Union (1,207,908), the United States (501,572), Japan (130,473), China (72,961), Swiss (6,569), South Korea (6,831), and others (83,424) (CitrusBR, 2018).

**Graph 1**  
**Brazilian National Production – Oranges (tons, 2019)**



Source: Instituto Brasileiro de Geografia e Estatística – Levantamento Sistemático da Produção Agrícola.

<sup>6</sup> 58,01% of frozen concentrated orange juice (FCOJ), 15,79% of “not from concentrate” (NFC) orange juice, and 15,82% of other juices.

**Figure 2**  
**Brazilian extended citrus belt – orange production**



Source: Christliche Initiative Romero. Squeezed: behind the scenes of the juice industry. <https://reporterbrasil.org.br/wp-content/uploads/2018/12/squeezed-behind-the-scenes-of-the-juice-industry-.pdf> (last consulted 21 September 2019).

As noted, the orange juice sector is extremely concentrated. Three companies – Citrusuco, Cutrale and Louis Dreyfus Company – share around 70-80% of the orange juice production and 80% of Brazilian total exports (including frozen and concentrate orange juice and other varieties) in Brazil (Lopes, 2019b; Barbosa, 2012; Neves et al, 2011). Two of them, Cutrale, with 30% of world exports, and Citrusuco/Citrovita, with 40%, are Brazilian privately held companies (Christliche Initiative Romero, 2018; Citrusuco, 2019). One, Louis Dreyfus Commodities (LDC), is a French multinational company. In 2015, Citrusuco and the Safra bank bought 84,46% of Chiquita Brands stocks (Pressinott, 2015).

This nearly oligopoly in orange juice production has its roots in a broader context of modernization in Brazil in the 1970s, with profound connections of agricultural activities to industry. Since then, agro-industrial complexes in Brazil have dominated many commodity chains in the country. This initial national institutional context, together with the favourable international conjuncture of the 1970s/1980s strengthened the development of the Brazilian orange sector. Moreover, as the sector became bigger and more market driven, peasants became (progressively) workers (Barbosa, 2007).

Another trend in the OJVC has been vertical integration. That is, companies regain control of the whole production line as a way to be more efficient, due to the high level of competitiveness in the beverage sector (that is, for the final product output from much of the fruit crop) and with other agricultural crops spreading throughout SP (Citrusuco's port terminal manager interview, Santos, July, 2013). Moreover, control of sources of raw material guarantees levels of stock and supplies during the whole year, enabling companies to comply with their contracts with greater certainty (Barbosa, 2012). In turn, the sector came to be accused of abusing market power by the São Paulo Legislative Assembly, because of vertical integration in the years between 2000 and 2010 (ALSP, 2017). Prices, in these years, indeed increased, as did on-farm production – from 20 million boxes in 2002 to 130 million boxes in 2012 (Ito & Zyllbersztajn, 2017).

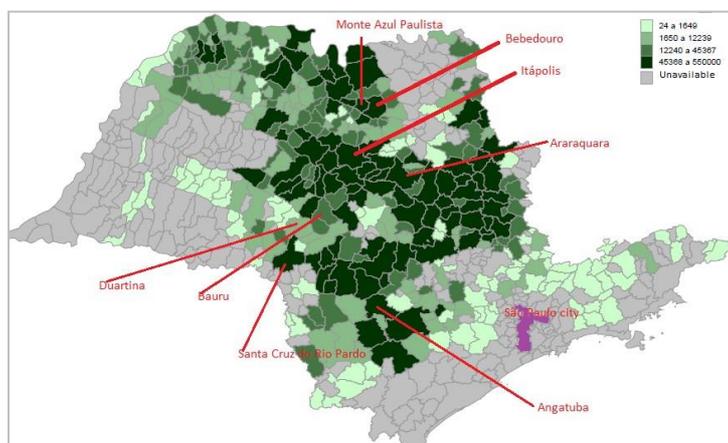
Market power occurs via a cartelization process by which a few producers are capable of determining unilaterally prices and conditions for the entire market. The cartelization was the subject of a Commission of Parliamentary Inquiry (Comissão Parlamentar de Inquérito, CPI) in São Paulo state. Investigations concluded that the cartelization process led many small-medium-scale and even some big farmers into bankruptcy. In São Paulo state, in the 1990s,

around 30 thousand farmers used to produce oranges in the region; currently, only about 8 thousand do so. Furthermore, between 2011 and 2016, around 50% of small and medium-scale farmers stopped their operations. Concentration in the sector is in the hands of the following companies: Citrusuco/Fischer, Cutrale, Cargill, Coimbra, Citrovita, Royal Citrus, and Nova América. It's worth mentioning that the following companies previously signed an agreement with the antitrust institution Cade: Cutrale, Citrovita, Coimbra (Louis Dreyfus Company), Fischer, Cargill, Bascitrus and the former association in the sector, Abecitrus.

However, juice cartelization is not a new development, it has been denounced since 1976 (ALSP, 2017). As a reflection of the concentration in the whole chain, the production of oranges has also become more concentrated. São Paulo's production of citrus is concentrated in large properties: according to the Fund for the Defense of Agriculture (Fundecitrus), 66% of the production in the citrus belt are in 6,28% of the orchards (quoted in Brasil Agro, 2019).

Further evidence of this is seen in that, even according to Fundecitrus, “between 2015 and 2018, 1713 properties stopped growing oranges” (Fundecitrus, 2018/9, p. 36, free translation).<sup>7</sup> Moreover, the number of properties decreased at the same time as production spread to other parts of SP state. Diseases and the increase in sugar cane plantations are the main reasons for this geographical transference of part of production to Southern regions of SP (Neves et al, 2011; Barbosa, 2012; Barbosa & Gitahy, 2010). In this new production region, farms are larger, and the chain is more vertically integrated. Figure 3 shows the distribution of orange production in tons in SP 2011 and Figure 4 in 2017. The cities in red are those where the fieldwork was conducted.

**Figure 3**  
**Municipal orange production (in tons) in SP in 2011**



Source: IBGE, 2013.

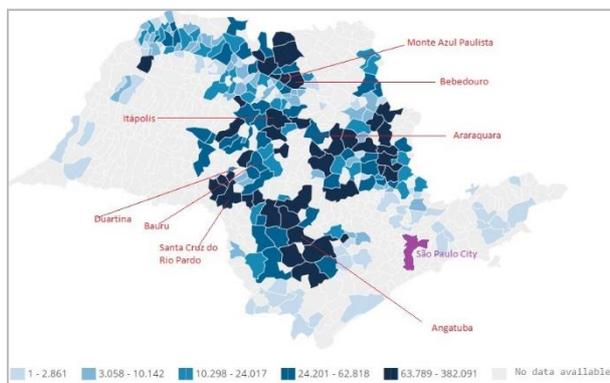
In 2017, São Paulo held 78.7% of the Brazilian production of oranges, with 10.77 million tons being produced in 320 municipalities of that state. This production level corresponds to 188 million trees cultivated over 388 thousand hectares.<sup>8</sup> Despite its dominance, the state was affected by the crisis in the sector in 2012, which led to a decline in the state's production since

<sup>7</sup> Original text: “Entre os inventários 2015 e 2018, 1.713 propriedades deixaram de cultivar laranja”.

<sup>8</sup> Available at <https://g1.globo.com/sp/sao-carlos-regiao/noticia/2019/01/21/interior-de-sao-paulo-produz-quase-80-da-laranja-brasileira.ghtml>. Last accessed on January 31<sup>st</sup>, 2020.

2010. This trend, however, was reversed by a rapid recovery in 2016 and 2018 (Instituto de Economia Agrícola, 2019).<sup>9</sup>

**Figure 4**  
**Municipal orange production (in tons) in SP in 2017**



Source: IBGE, 2017.

After 2015 there was thus both property and profit concentration in the hands of large landowners and corporations. The most delicate outcome of these modifications in power in the chain have been faced by medium and small-scale producers. Squeezed by low prices paid per box by the oligopolistic producers, and increasing costs for labor, inputs and transport, these producers face(d) difficulties to maintain their position in the chain and in their level of income (SOMO, 2017; CADE, 2019; PRT, 2013).

Small-scale producers have few options:

1. Not being able to follow developments in scale, cost efficiency, and in the renovation of orchards due to disease, they are forced to sell their land, increasing the enlargement of farms, especially those owned by large firms;
2. They may change to more attractive crops, which require less investment, less time and better returns (such as soy and sugar cane);
3. They transfer the cost to actors at lower levels of the OJVC, as illustrated in the case of other agriculture value chains, i.e. outsourcing (of labour relations and other “risks”), using intermediaries to define wages and labour conditions, organizational flexibility, gendered and insecure forms of employment, unprotected and exploitative forms of work and employment, and “modern slavery” (Barbosa, 2008; Dolan, 2004; Pegler et al, 2010; Philips & Sakamoto, 2011).

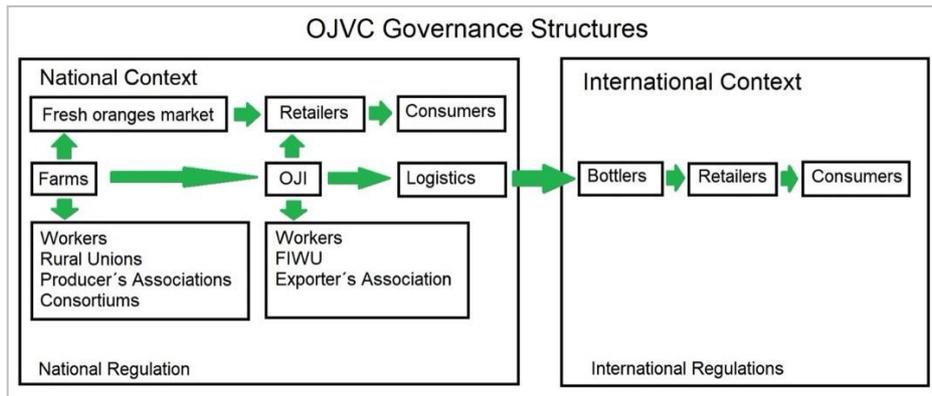
Although it is impossible to measure the full impacts of cartelization for small-scale farmers and workers, as this is an illegal practice, impacts on outsourcing are well registered in recent reports and in the Brazilian labour courts. According to SOMO (2017), pickers are exposed to pesticides and paid insufficient wages, labour conditions are extremely poor, “neo slavery” and child labour have been identified, work shifts sometimes reach 14 hours in length and, as joining a union is risky, as one might lose her/his job. It is relevant to note also that verticalization and market concentration (accompanied by human rights violations) have had effects along the chain and up to northern consumers, as supermarkets have no other option but to buy from the largest players:

<sup>9</sup> Available at <http://www.iea.sp.gov.br/out/TerTexto.php?codTexto=12856>. Last accessed on 31 January 2020.

it highly unlikely that Dutch supermarkets can avoid doing business with Citrosuco, Cutrale and LDC (for both branded and private label juices). They thus encounter significant risks of severe human rights violations and labour standard violations in their supply chains in Brazil. And they must take responsibility for this (SOMO, 2017, p. 6).

Even though the Brazilian Labour Court has required these large firms to pay R\$ 455 million for collective moral prejudice and to end outsourcing their production in “false cooperatives (Repórter Brasil, 2013), the sectors structure has remained little changed. The OJVC is summarized in Figure 5 below.

**Figure 5**  
**The OJVC**



Source: created by authors, based on Barbosa (2012) and Neves (1999).

Having contextualized the concentration and other structural changes in the OJVC, some questions are worth analysing: How are workers at each node affected by these changes? Does this Brazilian chain dominance imply any positive outcomes for labour at farms, factories and port? The next subsection focuses on the workers and their activities at work, to give a picture of how (Brazilian) chain governance dominance affects worker security and livelihoods.

### 3.2 Labour outcomes in the OJVC

The majority of workers involved in the chain, both in factories and in farms, are temporary. Modifications in the overall governance structures of the chain have led to an overall reduction in the number of work positions in the sector. In rural areas, rising outsourcing and increased presence of migrants and women, resulting in modifications in the methods of hiring across the chain, have been observed. Lower labour costs are a key competitive advantage of orange production in Brazil, in comparison with Florida, for example. (Neves et al, 2011; Secco & Patury, 2003). According to SOMO (2017), in total, in Brazil, around 420,000 rural workers are employed in the orange sector.

A summary of the findings of the research regarding workers (tasks, impressions and attitudes) are broadly summarised in Table 2 below and discussed in the subsequent narrative by group.

**Table 2**  
**LABOUR – Value chain characteristics in different nodes of the chain**

|                      | <b>Agricultural</b>                | <b>Local Transport</b>                | <b>Juice Factories</b>                              | <b>Exportation Transport</b>      | <b>Port workers</b>                        |
|----------------------|------------------------------------|---------------------------------------|---|-----------------------------------|--|
| Type of workers      | Unskilled workers                  | Semiskilled                           | Semiskilled   | Semiskilled                       | Semiskilled                                |
| Employment condition | Formal<br>Temporary<br>No training | Informal<br>Temporary<br>Unstructured | Formal<br>Temporary<br>Highly pressured             | Formal<br>Permanent<br>Controlled | Formal<br>Permanent<br>Some responsibility |
| Livelihoods          | Moderate<br>Low wage               | Low<br>Adequate wage                  | Low (temporary workers)<br>High (permanent workers) | High                              | High                                       |
| Labour market        | Low beyond agriculture             | Uncertain<br>Low                      | Moderate  | High                              | High                                       |

Source: created by authors.

### *Agricultural workers*

Farms usually employ a few permanent workers and a large number of temporary workers during harvest (from June-July to January) (Barbosa, 2012). Among permanent workers, there is the “turmeiro”,<sup>10</sup> a central actor in intermediating workers and farms<sup>11</sup> (Barbosa & Alves, 2009; Barbosa, 2008; Goodman et al, 1985), as in other agricultural chains (Pegler et al, 2010). Also known as contractor, supervisor, controller or leader, the “turmeiro” is usually a male permanent worker of the farm or condominium,<sup>12</sup> who is responsible for finding, selecting, hiring and transporting workers for the harvest (Barbosa, 2008; Barbosa & Gitahy, 2010; interviews, SP, July, 2013). In general, the “turmeiro’s” payment consists of a fixed salary, a percentage rate over the boxes his group picks and a fixed amount to cover local transportation (interviews, SP, July 2013).

Besides the “turmeiro” and few permanent workers, the majority are temporary workers, though regularly hired, which means they have access to social security benefits, such as legal minimum wage, protection equipment, transport, weekly resting day and so on. On average, the tenure of work among the interviewees in the orange sector is 6,5 years. There is no significant gender division<sup>13</sup> of labour and the presence of women is perceived to be slightly

<sup>10</sup> The evolution of labour force hiring in the orange sector has followed a specific trend, from informal verbal contracts to the condominiums arrangements, passing through direct orange juice companies hiring. For more information about it, see Barbosa & Alves (2009), Barbosa (2008), Barbosa & Alves, (2009), Barbosa & Gitahy, 2010, Duarte (2013).

<sup>11</sup> As a comparison, in Bhutan, the presence of middlemen is different. The middleman is the one who intermediate the sales and purchasing of oranges and is really important. The producers sell their oranges to the middlemen who are in general responsible for transporting, and, sometimes, for harvesting. The middlemen transport the oranges to wholesale markets or sell them to exporters (Joshi & Gurung, 2009).

<sup>12</sup> Condominiums are the last stage of the evolution in the manner of hiring labour force for orange harvesting. In short, a group of farmers create sort of a cooperative to hire workers during the harvest, in order to share costs. The workers are hired for a longer period, since they work in a range of different farms. The changing in the way labour force is recruited has strong impacts in the livelihoods of workers, farmers and unions. Due to that it will be studied in more detail in the next section.

<sup>13</sup> Nonetheless, since the payment is a piece rate system, men earn more because they pick more oranges daily. On average, the female interviewees pick 82 boxes per day, while men 120. Each box has around 35kg.

lower than half of the workers, except in those orchards that require more product selectivity.<sup>14</sup> (Figure 6 shows a female picker.) Due their low levels of education, possibilities of work outside the orange groves or in other agricultural jobs are quite narrow.<sup>15</sup> Women seem to be more positive about future possibilities than men, including perceived security about the labour market, the likelihood of keeping the job for the next season and of finding other jobs at other farms.

The typical worker is on average 42 years-old, married, with grown-up kids, white and with incomplete primary education. The workers usually have some assets, especially physical (housing, motorbikes, car), natural (land), and financial (savings and access to formal banking and shopping loans). His/her household is small (on average about 3 members). Concerning household tasks, in general, both men and women work outside, and reproductive work is carried out by women or shared. The responsibility for household expenditures is, in most of the cases, shared between men and women, or men are responsible. Usually their previous occupation is related to agriculture services in other sectors, such as coffee, corn or in subsistence activity. Their parents are illiterate or with basic literacy and were also usually agricultural workers. Their children have higher educational levels and do not work in agriculture. Although the literature says the number of migrant workers is increasing (Barbosa & Gitahy, 2010), the workers interviewed were mainly local or long-term migrants settled in the region for a long time.

**Figure 6**  
**Female worker in orange orchards in Itápolis, SP, carrying ladder, bags, and personal objects**



Source: fieldwork, Itápolis, July 2013.

As wages depend on the number of boxes picked (around US\$0.30 per box picked), workers tend to work hard. However, a minimum monthly wage of around US\$308 is defined, throughout a season, even if the picker does not reach the minimal number of boxes and they all mention they experienced autonomy and fair and good supervision. None of the workers mentioned a competitive working environment or lack of autonomy for resting or eating. Some

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<sup>14</sup> Selected oranges are those which are going to be sold in the fresh fruit market. These oranges have to be more beautiful, clean and with no spots. As in the case of horticulture in Kenya (Dolan, 2004), women are generally preferred for this type of collection, because they are seen to be more attentive and have more dexterity (interview with farm manager and Agroterenas manager, Angatuba & Santa Cruz do Rio Pardo, July, 2013).

<sup>15</sup> Orange pickers' options usually are side jobs in agricultural activities, such as cleaning fields or wood cutting, renting rooms in their houses and house cleaning and sewing for women.

of them enjoy the work due to the friendly environment, friendship with colleagues and, especially, autonomy to make their own routine. Even so, due to the high weights carried every day, the main health issues are related to backache, with people also reporting falls, insects, snakes and respiratory diseases.

### ***Local transport workers***

The workers who transport oranges from the farms to a factory (almost exclusively men) are not regularly employed. They are paid a fixed amount for each load of freight they carry, not considering the distance they cover. They usually own the truck, and are responsible for all costs of transport they incur, such as tolls, maintenance, assistants, fuel, etc. Since the harvest is temporary, between seasons these truckers find work in other agricultural activities, such as transporting soy and cotton. As informal/irregular workers, they do not have access to any social security benefits and, in general, are not connected with any workers' association or union, though they know about their existence.

Due to these characteristics of their work, their level of insecurity is high. Their coping strategies are limited. In order to earn more money, they work long hours with few resting and breaks. They also cover longer distances searching for freight that is further and further away from factories. Their insecurity becomes more visible due to chain integration, with factory owned farms increasingly outsourcing local transport to medium sized transport companies, reducing even more these truckers' opportunities.

### ***Factory workers***

The OJC factories are spread across São Paulo state. In general, the factories are located in small/medium size cities and are an important source of jobs, income and local development. In the high season, each plant works 24h/7 days per week and the workers are distributed in 3 shifts, with 2 days off weekly before changing shift. The activities are performed in small groups of 3 to 4 people, the third and/or fourth being a temporary worker hired during the season. Although most workers are temporary, some are permanent. All of them are formal workers, with access to social security and some extra benefits such as extra meals, medical assistance (including family and dependents) and groceries purchasing assistance. Safety, health and good working conditions are the main issue for workers in factories. OJC factories are regulated on this issue and both permanent and temporary workers receive personal protection equipment (PPE) and safety training.

The gender division of labour is clearer than in farms. Women are concentrated in cleaning, quality and bottling activities. There is also a clear division of labour among temporary and permanent workers. Temporary, usually unskilled workers, are hired for a wide range of support activities in the factory, giving them a multifunctional profile. Usually temporary workers are younger, single, with no assets such as housing or vehicles. In between season, they work in construction or other industrial activities. Their work is very unstable, with high turnover rates, and the expectation of re-hiring is low. In contrast, permanent workers face a more secure picture. They all have their own houses, cars and motorbikes. They were all born and raised in the region. Their previous occupation is related to agriculture and other factory jobs. These workers are more skilled. On average, their tenure of work is 22,6 years in the same factory. Some of them are already retired.

Most of interviewees were white married men, with an average age of 48 years with 2-3 children, giving an average household size of 4 to 5 people, which is higher than the average for rural workers. Reproductive tasks are carried out by women (wife or daughter), while HH

expenses responsibilities are mainly shared. Their level of education varies from incomplete primary school to complete high school. Younger workers usually have completed high school. Concerning their parents' educational level and occupation, the father is literate, while the mother is illiterate and was/is a housewife or agricultural worker.

Low wages, especially in comparison with other jobs in the region, and lack of career possibilities, together with the system of shifts and higher qualification, are motives that discourage young people from working in the factors and helps to explain high turnover rates and the maintenance of retired workers (interviews with FIWU, Matão, July 2013). Yet, even still, most of the interviewees do not see their income as adequate relative to their living costs.

### ***Transport to port workers***

As also mentioned by management interviewees,<sup>16</sup> logistics is one of the core reasons for Brazilian leadership in the OJVC. The development of bulk transport has made export more efficient. Notwithstanding, this kind of transportation requires high production loads and substantial investments in technology. Highly modern trucks and cold and aseptic tanks, in turn, require qualified workers. Therefore, transport workers are formal, permanent, more qualified, receive better payment and have access to social security and extra company benefits, such as meals vouchers, food basket, health insurance. Their level of education is usually high school, as is their family members' (wife, kids and even parents). Another characteristic in this node of the chain is a high gender division of labour. Driving these highly technological trucks is a predominantly male task, while household activities are mainly performed by women, be it his wife, daughter or a female housekeeper (when family members work outside).

Nonetheless, truck drivers face not so pleasant working conditions. They usually work around 10-12h per day, facing huge traffic jams, pollution, stress and the risk of accidents. The driver always has to be on standby to attend company needs. Then, when called, he usually drives from 500km to 800km from a factory to the port of Santos. There, he waits in a line for his turn to unload the juice and drives back to his hometown. Usually the standby time is shorter during season (each 15h), while 30 hours in-between seasons. Although direct supervision is less strict in this type of job, the transport companies use payment as a tool: it is based on a fixed salary in addition to a bonus, depending on the distance covered, the time and the amount of fuel spent, reaching an average of US\$ 1333.33 per month.<sup>17</sup> Being involved in car crashes is also another point of insecurity and is the only reason for which one might get fired. The drivers enjoy their work and feel very secure about it. Truckers are the main transport modal in Brazil. Thus, there is a large number of highly paid jobs in this area, and also for autonomous drivers, though they are a bit more insecure. Most of the interviewees are long term drivers (20 to 30 years), and own assets such as houses, cars, motorbikes and even trucks.

### ***Port workers***

The port in Santos is the main export point for Brazilian goods. All the orange juice exported passes through Santos. The main companies (Citrosuco and Cutrale) own their terminals and outsource part of their capacity to other companies. Both terminals are located in the old terminal at Santos Port. Due to this arrangement, their port workers related to the OJVC are

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<sup>16</sup> Farm and industrial managers in Bebedouro, Santa Cruz do Rio Pardo and Santos mentioned this during interviews in July 2013.

<sup>17</sup> The salary is calculated using the Exchange rate of US\$1=R\$2,25 in 09/02/2014.

OJC employees and have the same sort of benefits of factory workers, presented in previous sections.

Access to workers and the workplace at private port terminals was very difficult during fieldwork. We were able to access the private port terminal once and not allowed to apply any questionnaire directly to employees. Data were collected through general questions during visits and observation.

## 4 Representation

Brazilian labour laws set a range of rules covering union representativeness. For example, there is only one union per category of workers in a determined region, which might include one or more municipality. (Scherer, 2007; Consolidação das Leis do Trabalho, 1943; Constituição da República Federativa do Brasil, 1988). However, to a small degree each union has the right to decide its internal structure, regarding contribution fees, number of members, frequency of meetings, etc. Due to space limits, we will draw some basic features of unions in each node, based on the models presented in Section 2.2, and show some of the challenges unions face in different nodes in value chains. Table 3 shows representation indicators based on interviews and observations across the OJVC.

**Table 3**  
**Indicators of Workers Perceptions / Union Conditions**

| Indicator                                     | Description                               | Rural      | Factory            | Local Transport | Export Transport | Port             |
|---|---|------------|--------------------|-----------------|------------------|------------------|
| <b>Freedom of association</b>                 | Existence of union                        | Yes        | Yes                | Yes             | Yes              | Yes              |
|   | Ability of workers to unionize            | Moderate   | Good               | Low             | Low              | Low              |
|   | Willingness of workers to unionize        | Low        | Low                | Low             | Low              | N/A              |
| <b>Representativeness</b>                     | Share of workers unionized and associated | around 20% | around 20%         | N/A             | N/A              | No accurate data |
|   | Territorial coverage                      | Municipal  | Municipal/Regional | Municipal       | Municipal        | Municipal        |
| <b>Freedom of union action</b>                | Access to workplace                       | Difficult  | Difficult          | Difficult       | Difficult        | Easy             |
|   | Presence at workplace                     | Low        | High               | Low             | Low              | Inexistent       |
| <b>Effectiveness and recognition of union</b> | Workers' knowledge about union            | Low        | Low                | Low             | Low              | N/A              |
|   | Workers' satisfaction with union          | Moderate   | Moderate           | Low             | Moderate         | N/A              |

Source: created by authors based on interviews/documents.

Rural workers are represented (mainly) by two different unions: SERs (rural employee union), and STRs (rural worker union). The division of unions in rural areas is related to internal disputes and alleged differentiation among rural workers in terms of family farmers vs paid workers. SERs are considered to have more radical roots, at least theoretically. They are connected to a Single Worker's Confederation (CUT, in Portuguese) via the National Confederation of Food Industry, Agroindustries, Beans Cooperatives and Rural Employers (CONTAC, in Portuguese). Back in the 1980s, CUT founded "the new unionism" in Brazil, one with more combative characteristics.

Applying the model of union identity to these rural unions, we found that their efforts are addressed to rural workers, whether employees or family farmers, including women, retired and active workers in a diverse range of agriculture types. Especially at state level, unions also include a broad range of interests which go beyond labour relations, such as the environment, gender issues, education and child labour. São Paulo Rural Workers Unions Federation (FERAESP) and SERs seem to be even more connected with those broader issues. Such as in tomato farms, these unions face “seasonal work patterns, [is] [...] they are resource poor and are faced with a very small population of active members” (Pegler, 2009: 23). This might influence the development of their agendas.

The rural unions’ actual agendas, however, seem stricter: salaries, working conditions, health and safety – issues of more practical interest to workers. Only one union (SER Duartina) mentioned workers political organization as one its priorities. The strategies of unions to achieve their priorities have followed what the literature calls “citizen unionism” (Martins, 2012), which means a substitution of more radical forms of fight by more pragmatic negotiations, although it does not mean ignoring traditional means of conflict/concertation.<sup>18</sup>

Considering their power, the fragmentation of rural unions has nonetheless weakened their bargaining power towards companies in negotiating salaries and other benefits. Collective agreements are only negotiated at local level in the orange sector. This results in a fragmented, non-uniform payment system, one in which a farmer with orchards in different municipalities may face different labour costs. There is little or no coordination both horizontally (with neighbour rural unions) or vertically (with unions across the chain), except for a (unsuccessful) initiative between FERAESP and the Food Industry Workers’ Union in Mogi-Guaçu, through CONTAC. These unions also check security items, such as PPE and transport. Further, they have an important role in receiving and responding to complaints about incorrect work conditions. Yet rural unions are facing a change in their potential base due to the spread of highly mechanized processes in alternative, and emergent, sectors, and in the geographical relocation of orange cultivation.

Regarding democracy and participation, although most rural workers know that their union exists, few know about what it does and even fewer have ever participated in meetings or assemblies. At best, when unions deliver some sort of services, such as dentistry, legal assistance, training courses, health insurance, etc., unionization is higher, though active political participation continues to be low. As a result, most union representatives are long term ones, sometimes work another job, and are often connected with local political processes. As in the tomato case (Pegler, 2009), getting involved in local politics seems a reasonable platform for visibility and social dialogue, so does union provision of services. Indeed, unions, at local level, are not much more than piece rate payment negotiators. The main point of their agenda does not come from actual workers’ debate about their situation. It is a top-down approach, mainly focused on wages, and it is based on previous agreements with employers, which ends up reproducing previous arrangements in the sector. However, unions connected with FERAESP tend to be more proactive, something that seems to be reflected in their bulletins, political debate during interviews and coordinated acts with other unions and social movements.

In contrast, the food industry (factory) workers unions (FIWU)<sup>19</sup> have a more cohesive model of representation. There are 54 unions at local/ regional level in SP, from which 50 are

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<sup>18</sup> E.g. at the end of July 2013, rural workers in Itapetininga, SP, started a strike to claim for better working conditions, transport and wages (Blog FETAESP, 2013).

<sup>19</sup> The interviews were carried out with the FIWU in Matão and Mogi-Guaçu. Matão has two OIC: Citrusuco and LDC. Citrusuco’s plant in Matão is the largest OIC in Brazil

affiliated with the São Paulo State Federation of Food Industry Workers (FETIAESP, in Portuguese). This worker's federation is affiliated with the National Confederation of Food Industry Workers (CNTA, in Portuguese). In turn, this confederation is linked to Força Sindical, a (generally considered more conservative) central that links several workers' confederations and is the second largest in Brazil, after CUT. Only 4 of the FIWU in this study region are linked with the more combative CONTAC and CUT. They represent workers in the food industry, which encompasses bakeries, candies, animal food, dairy products, etc., accounting for more than 15 different sectors, something which potentially increases their bargaining power with companies. This might influence the comprehensiveness of FIWU's interests. Yet, as noted, most factory unions and the federation in our study did not demonstrate having broader interests.

Health and safety are the major priorities of FIWUs, along with wages and better working conditions. The main strategy is to achieve wage improvements, following the tradition of Brazilian unionism, in negotiation with employers. Different from rural unions, the orange juice manufacturing sector has a state agreement, which is negotiated by FETIAESP. It involves economic (wages) and social clauses (other benefits).

Every union has a period to discuss issues with workers in assemblies, which are then brought to the federation, to combine in a single agenda. The participation of workers is made in these assemblies and other meetings, advertised through a website, newspapers and cars with sound systems. Nonetheless, as in the rural sector, unionization is low – around 17% paying members and only 1.5% active participant members. As for rural unions, representatives are usually in power for a long period and most of them are still working in a factory.

FIWUs have partnerships with the International Union of Food Workers (IUF), although practical outcomes are limited. A notable example was the more active FIWU union in Mogi-Mirim who mentioned a partnership with other unions across food chains – an initiative called “From earth to plate”. This initiative was pursued by CUT and connects rural and food unions. As in the case of rural unions, the FIWU (Mogi-Mirim) with connections with CUT has a more political and proactive attitude, dealing with issues beyond the workplace, as is reflected by the culture inside the union. They have an active website and a long-term newspaper, one which is widely distributed to workers.

In terms of transport workers, no interviews ended up being possible with union representatives. Notwithstanding that, among the sample of truckers interviewed, whilst many were members, none of them mentioned much knowledge of the union, its work, duties and benefits. The type of work (driving and spending most of the time on the road) is probably another reason for minimal contact/connection with the union. However, against this picture, the transport workers union is a very powerful one, since roads and trucks are the main method of goods and other transport in Brazil, especially for exports and internal supply. Many truckers' strikes in Brazil have caused significant supply stoppages, been well highlighted in the media and have reached many of their goals. Yet, among orange juice truckers, this is not the case. Conversely, despite their quite high level of security and livelihoods, their level of participation in political processes and active voice is not well developed.

The case of port workers in Santos is even more particular. Port workers involve a range of labour categories which are represented by two main unions. One is the Sindicato dos Empregados Terrestres em Transportes Aquaviários e Operadores Portuários do Estado de São Paulo (SETTAPORT), representing shipping agents and port terminal workers. The other one is the Sindicato dos Trabalhadores Administrativos em Capatazia, nos Terminais Privativos e Retroportuários e na Administração em Geral dos Serviços Portuários do Estado de São Paulo (SINDAPORT), which represents operative and administrative terminal workers from private and public initiatives. Around 40% of port workers are associated and have access to a range

of secondary benefits, such as school allowances, legal and health assistance, etc. Their main priorities are health and safety, as well as the reduction in working hours and increase in wages. Another important issue that came up during interviews is the construction of new terminals, operated by private companies. This has initiated a large debate about reform and privatization of labour relations, which is also a matter of representativeness dispute between these two unions. SETTAPORT tend to be more combative in the negotiations, while SINDAPORT is more willing to yield in order to gain terrain. The new terminal brings into the debate problems of multifunctionality, differences in wages, career plans, training and the qualifications of workers – issues that open up a potential point of contestation for improving labour conditions and livelihoods.

Nonetheless, none of these unions represents workers at the orange juice private port terminals and thus companies of this study. These company employees are represented in Santos by the Union of Brewery, Drinks and Meat and Derivatives of Santos (STIB, in Portuguese), a sector dominated by the drinks giant Ambev. This union is small, fairly organized and quite unrepresentative. Its board consists of the president himself, who has been in power continuously for more than 30 years. This president<sup>20</sup> is the personification of *sindicalismo pelego*, a term used to describe a form of unionism which “cushions employers’ pressure from employees’ exploitation”, offering little in relation to workers real needs and wants. This union has no connection with workers, no mechanisms of participation, no website or bulletin. Its only, single agenda and strategy is (occasionally) to negotiate wages or meal allowances directly with the employers.

Reaching orange juice private terminal port workers for interviews through the union help was impossible. In addition, access to orange juice companies’ port operations was very limited, which did not allow us to talk with many port terminal workers. Considering that most of the world’s orange juice supply goes via these private terminals, having the STIB as a representative of these key workers is a gift for employer prerogative in this sector. The likelihood of mobilization and contestation in this environment is very low; though workers’ potential bargaining power is probably very high. The coordination among workers in these two nodes (final transport and the ports) could paralyze the bulk of Brazilian orange juice exports (and world supply), directly affecting the chain drivers.

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<sup>20</sup> The president was an 80-years-old man with strong connection and affection with the military dictatorship which ruled the country from 1964 to 1985. There is a picture of the last military president, João Figueredo, hanging in the meeting room of the union headquarters.

## 5 Conclusions

The Orange Juice Value Chain in the state of São Paulo, Brazil has become increasingly coordinated, horizontally and vertically, over time. It delivers most of the world's orange juice and is driven by three key producers - two Brazilian & one foreign owned. In order to understand the effects of this on workers' labour and employment relations, this paper analysed worker's security and voice/representation. The methodology included indicators of work, security and worker voice along the chain (on farms, factories, transports and in the port) and applied a model of identity (voice/representation) to unions operating across the chain.

A typology and rank of orange chain workers was made based on findings in terms of these indicators. Differences of labour outcomes depend on the location of workers along GVCs, and the union identity model helped to explain constraints to representation/voice at the local/territorial level. Labour outcomes in the OJVC demonstrate differences among workers along the value chain, in terms of skills, employment conditions and livelihoods. However, results show no direct correlation between such measures of worker's standards and their actual livelihoods. Although most workers are semi-skilled (local transport, juice factory, exportation transport and port), some of them are formal and permanent workers with high levels of livelihoods (exportation and port workers). In contrast, others have less secure job status – local transport workers are informal and temporary, and juice factory workers are formal but temporary workers – and have low levels of livelihood. Still, agricultural workers seem to be the real statistical outlier – they are unskilled but enjoy medium to high levels of livelihood satisfaction in their low skilled, seasonal work.

Representation/voice issues in the chain illustrate the value of grounding studies at the intersection of global chains and local processes of labour control. For the rural workers case, there are internal union disputes and alleged differentiation among family farmers vs paid workers. Some unions also include a broader range of interests which go beyond wages and services. The fragmentation of rural unions has nonetheless weakened their bargaining power, consequently non-uniform payment systems are the norm. The factory worker unions, on the other hand, have more cohesive representation focused on health and safety, and have some (albeit loose) international links. Port workers do not have any real union representation, and the likelihood of mobilization and contestation in this environment is very low, although its potential effectiveness is high, due to oligopolistic type control of the sector (in Brazil and globally). No transport worker mentioned an in-depth knowledge of unions, their work, duties and benefits. Yet transport unions are potentially very strong due to the power of “their” members in other sectors and for other social developments.

The link between unions and social upgrading is thus not clear or consistent. Port workers, whilst virtually not represented by unions, enjoy formal and permanent job status with high standards of livelihoods. Crucial transport workers have considerably better chances to achieve decent work and to upgrade their conditions but have a union they do not engage with. In all cases of workers in this chain, there are difficulties and an absence in global alliance building, despite or maybe because of the degree of vertical and horizontal control by a few key firms in this chain. Most of the labour force has had their conditions squeezed in the face of declining market demand whereas the potential “labour aristocrats” (workers with good conditions and potential bargaining power) are controlled by other (structural and institutional) means.

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