

Lula and Morenóite-led union promote arms industry amid US offensive against Brazil

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On Friday, July 24, President Luiz Inácio Lula da Silva (Workers Party–PT) attended the official reactivation of Avibras, for decades Brazil’s largest defense industry company. The ceremony brought together the three chiefs of the Armed Forces, government ministers, businessmen and officials of the Metalworkers Union of São José dos Campos and Region (SindMetalSJC), affiliated to the CSP-Conlutas trade union federation led by the Morenóite Unified Socialist Workers Party (PSTU). The event represented the convergence, on the same platform, of the bourgeois state, the military high command, big private capital and the pseudo-left trade union bureaucracy.

The reactivation is the centerpiece of a drive Lula has pressed forward over the past month to expand Brazil’s defense industry. The US invasion of Venezuela and the kidnapping of President Nicolás Maduro on January 3, 2026 set off alarm bells through the Lula government. The threat of direct US military aggression against Brazil was recently acknowledged officially by the Ministry of Foreign Affairs, which warned that the Trump administration’s designation of the criminal factions Primeiro Comando da Capital (PCC) and Comando Vermelho (CV) as “Foreign Terrorist Organizations” in late May “could be invoked as justification for extraterritorial actions.”

That designation comes on top of the punitive tariffs imposed against Brazil since July of last year—part of a broader US offensive against Brazil and Latin America aimed at rolling back Chinese influence and installing governments aligned with Washington’s interests across the region. A new round of US tariffs was imposed on July 15, designed to help Trump’s fascist ally Flávio Bolsonaro win the October presidential election against Lula. The Lula government answers this offensive with rearmament: a nationalist and militarist response to the crisis of global capitalism.

Founded in 1961, Avibras produced missiles, rockets, armored vehicles and space launchers for the Brazilian Armed Forces and dozens of international clients. In March 2022, the company entered bankruptcy proceedings. More than 400 workers were laid off, though the courts suspended the dismissals.

Without receiving their wages, the workers carried out a strike lasting three and a half years—from September 2022 until March of this year, when a fund led by billionaire businessman Joesley Batista of the JBS group announced an investment of R\$300 million (US\$59 million) to resume production. The largest meat processing enterprise in the world, JBS is also one of the largest beneficiaries of state credit programs under the first PT government. The Lula government announced a further R\$300 million, not yet invested in Avibras, whose primary stated purpose is to cover workers’ back wages.

The first to speak at the ceremony was Vice President Geraldo Alckmin. Turning to the Army chief, Gen. Tomás Paiva, Alckmin captured the militarist logic driving the event: “The army can go 100 years without being used, but Brazil cannot go a single minute without being prepared. Defense, the capacity for persuasion.”

Alckmin also highlighted the unblocking of public financing for defense industry exports through the Export Stimulus Program. The figures he announced speak for themselves: Brazilian defense industry exports leapt from US\$600 million in 2022 to US\$1.7 billion in 2024, doubling again in 2025 to reach US\$3.4 billion. Another figure sheds further light on the PT government’s militarist program: last year, military spending in Brazil rose by 13 percent—far above the global average of nearly 3 percent over the same period.

In his speech, Lula declared it “a special day,” explaining that since the beginning of his government in 2023 he had held meetings with military chiefs and ministers with the aim of reactivating the company. For Lula, keeping Avibras idle was unacceptable: “There was no political, economic, or social explanation, and there is no explanation either as a sovereign nation, for us to preside over a country that had a company which had accumulated the technological knowledge of Avibras—producing something so important for the country’s security—shut down and being destroyed.”

The most revealing passage of the speech, however, was Lula’s comparison of the Armed Forces to God—an institution one turns to in every crisis. “I want the Armed Forces well prepared, well trained, with enough soldiers to take care of this country,” he declared. The president enumerated the resources that would make the country a coveted target: critical minerals, rare earths, the world’s largest tropical rainforest, 12 percent of the planet’s fresh water.

The “sovereignty” Lula invokes is entirely that of the bourgeois state and its Armed Forces—the same forces that harbored and protected the conspirators behind the January 8, 2023 coup attempt, whose apparatus remains intact and closely intertwined with the US military. In a country that has not fought a war involving its national sovereignty in more than a century and a half, and which was ruled by a blood-soaked military dictatorship for some two decades beginning with a Washington-backed coup in 1964, there is an infinitely greater likelihood that a revamped military will turn its guns against the Brazilian working class than fight a war of national defense.

At the delivery of a frigate to the Navy at the TKMS Estaleiro Brasil Sul shipyard in Santa Catarina on June 26, Lula portrayed that apparatus as the foundation of “the beginning of a country that will assume, in fact and in law, the right to be sovereign,” emphasizing that his governments—the 2003-2010 period and the current one alike—have always been marked by a “good relationship with the military.”

The program Lula announced is that of a government preparing to become an arms exporter on a growing scale. Pledging that “the Armed Forces, together with the Defense Ministry, will prepare to place whatever orders need to be placed,” he went further still: “We are going to have to travel, Zé Múcio [Defense Minister], selling things.”

To obfuscate what amounts to the transformation of Brazil into a major international arms dealer, Lula reached for a cynical formulation typical of bourgeois militarism: “When I sell a weapon abroad, I say: it was made

by Brazilian workers—men and women—and they don't want to kill anyone. This weapon is for peace. It's just so you can say you have it, so nobody messes with you."

Lula has invoked Washington's expansionism to justify this program: "Right now the American president wants to take Greenland, Canada is going to become his state, he wants to take the Panama Canal," he declared in June. His "weapons of peace," however, have a precise destination in the real world. In the 1980s and 1990s, Avibras supplied equipment for the Iran-Iraq War and the Gulf War. Today, four of Brazil's five largest defense export customers are NATO members, including Germany and the United States, and Brazilian equipment is being used in the wars in Ukraine and Iran.

At the same Santa Catarina ceremony, Lula spelled out the place this program now occupies in his government: "Beyond education, beyond healthcare, beyond the energy transition, beyond artificial intelligence, defense is part of my priorities to transform this country into the true country it needs to be." He added: "For the first time, I will include the question of defense in my government program."

With the reactivation of Avibras and the approval—late last year—of an opposition bill backed by the Lula government allowing the Defense Ministry to spend R\$5 billion annually outside the "new fiscal framework" that limits government expenditure, for the next six years, both the defense budget and exports will almost certainly continue to rise, drawing Brazil ever deeper into the gears of the global imperialist war machine.

Lula government, military and Morenito-led union: a division of labor against Brazilian and international working class

In his speech at the ceremony, Lula was effusive in his praise for the Metalworkers Union of São José dos Campos and Region (SindMetalSJC). "The union is a source of pride for the maturity of its understanding of the importance of the company and the political moment we are living through." The phrase captures the role played by the Morenito leadership of SindMetalSJC: that of a bureaucracy which, over three and a half years, "matured" in the direction of the negotiating table and in accordance with the interests of the bourgeois state, militarism and national private capital.

Present at the ceremony, Weller Gonçalves, the union's president and a PSTU member, addressed Lula directly, advancing essentially the same nationalist and militarist program as the PT government. He recounted the "many meetings held with Vice President Geraldo Alckmin, with Defense Minister Múcio and with other ministers." What was conspicuously absent from Weller's remarks, however, was his own intensive campaign of engagement with the Brazilian military, whose principal interlocutor was the reactionary military commander Robinson Farinazzo. This partnership culminated most recently in a public campaign for SindMetalSJC to receive the Order of Military Merit, the Brazilian Army's highest decoration.

At the ceremony, Weller handed Lula a document that encapsulates the program the Morenito bureaucracy has pursued throughout this entire period. "The return of Avibras is a great victory for our country," the document declared, crediting the union's struggle with having prevented "Brazil's main defense industry from being handed over to foreign capital." Addressing Lula directly, Weller was still more emphatic: "We did not waver in defending Avibras as a national company."

The document also put forward what it called a "strategic proposal for national development": the re-nationalization of aviation giant Embraer—which also produces military aircraft—the nationalization of

Avibras and all strategic companies in the defense sector, and their merger into a large state-owned industry integrated with universities and research centers.

Just as Lula had done moments earlier, the document justified this proposal in terms of the "profound transformations in world geopolitics," the "ongoing wars" and the "rivalry between major imperialist powers," concluding: "no country that intends to preserve its sovereignty can do without a national defense industry."

The interview Weller gave to *Brasil247* on July 24 is still more revealing about the real political role the union has played. He disclosed that at the outset, government representatives argued: "Look, you talk about nationalizing the company, you talk about government investment. Brazil is not at war. If we invest in Avibras, people will question why we're not investing in healthcare, in education, in infrastructure."

That argument—whose substance was subsequently repeated by Alckmin and Lula—reveals that the systematic lobbying by the Morenito-led union helped create the political conditions for the PT government to present rearmament as a national priority on a par with social policies. "The defense industry needs government funding. It's the money from our taxes that the government must invest in Avibras," Weller concluded. He also argued that the company "will need to improve itself" and "pivot to producing drones."

Weller did not ignore the fact that his alliance between a "communist trade unionist" and a military figure like Farinazzo had drawn criticism. In what appears to be a direct reference to the WSW— which has published an extensive record of articles exposing the SindMetalSJC's militarist program amid broad silence from the pseudo-left—he declared: "There are even some websites out there, aren't there, Commander, that stir up controversy saying: 'wow, a communist trade unionist alongside a military man—what's that about?'" He answered his own question: "Each to their own ideas. But when it comes to the struggle for the return of Avibras, it is a united front." Such a nationalist, multi-class front between a union leadership and the military represents a grotesque and reactionary parody of the "united front" policy advanced by Trotsky.

The political content of this fraudulent "anti-imperialism" is further exposed by the positions on the main international conflicts adopted by the PSTU and CSP-Conlutas, the trade union federation to which SindMetalSJC is affiliated. While crying for Brazilian "national sovereignty," they have championed the US-NATO arming of Ukraine in its proxy-war against Russia, the war in Syria and other initiatives by the same imperialist powers.

In the *Brasil247* interview, Weller went still further in his nationalism. He claimed that the Bolsonaroist far-right had hijacked "national symbols," adding: "The real patriot is the worker on the shop floor ... The real patriot is the metalworkers' union that stood on the front lines fighting for Avibras and wants to defend our country. This far-right crowd has nothing to do with patriotism."

Weller's argument is, at its core, a declaration against the international character of the working class. By proclaiming that "the real patriot is the worker" and contesting the "national symbols" with the far right, the SindMetalSJC president advances no independent class perspective. The "patriotism of the worker" Weller invokes is, in practice, the patriotism that leads workers to subordinate themselves to bourgeois nationalism—to accept the sacrifices demanded by the state and capital in the name of the nation, and to identify their interests with those of their own ruling class.

But the working class has no homeland. By its very position in the productive process, it is an international class. A metalworker in São José dos Campos has more in common with a Boeing worker in Seattle, a defense factory worker in Germany or a worker in Iran than with Lula, the Brazilian generals or the businessmen who now control Avibras. What unites them is not the flag, but exploitation—and what divides them is not national origin, but class.

The Avibras ceremony takes place as the imperialist wars enter a new stage. The war between Russia and NATO-backed Ukraine and the war waged by the United States against Iran are intensifying, while the genocide in Gaza continues unabated. Last week, Ukraine struck an Iranian cargo ship in the Caspian Sea, claiming it was carrying drones and missiles bound for Russia. Iran denounced the attack as aggression against a commercial vessel. As the WWSWS analyzed, the attack exposed the global character of imperialist war, with the conflicts in Ukraine and Iran increasingly converging into a single conflagration.

The answer to the escalation of imperialist war and the growing threat of a third world war cannot come from bourgeois nationalism—not from the PT government, not from the military, and not from the trade union bureaucracy that marched alongside them. It requires the independent political mobilization of the Brazilian working class in unity with its class brothers and sisters in the United States, Ukraine, Iran and across the world—in a common struggle against capitalism and the imperialist war system it generates.



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