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Mapping of the Wine Production Chain in the Gaucha Region

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Abstract
The Gaúcha Campaign, located in the state of Rio Grande do Sul (RS), Brazil, is the second largest wine-producing region in the state and one of the most important in the country. Although soybeans and beef cattle predominate in the region, the wine production chain stands out for adding economic value and offering potential for environmental sustainability. In this context, this study aims to map the wine production chain in the Campanha Gaúcha and analyze the prospects for its development, identifying its potential and challenges. The research, which was qualitative and exploratory-descriptive in nature, involved collecting data from eighteen wineries associated with the Associação Vinhos da Campanha Gaúcha (Wines of the Campanha Gaúcha Association) through semi-structured interviews. Content analysis was used to analyze the data. The results indicate that viticulture in the Campanha Gaúcha has competitive advantages linked to climate, terrain, and institutional organization, which favor the production of fine wines and the growth of the sector. Despite challenges such as infrastructure and dependence on external inputs, the production chain shows prospects for expansion and strengthening in regional development, especially in wine production and the strengthening of wine tourism, adding value to the grapes grown in the region.
Keywords: Agribusiness. Production Chain. Viticulture. Campanha Gaúcha.

1 Introduction

The wine production chain comprises an integrated system that begins with the cultivation of grapes, continues through winemaking and industrial processing, and culminates in the marketing and consumption of grape-derived products such as wines, juices, and sparkling wines. It is an activity marked by a strong relationship with the territory, cultural identity, and high added value (Borsellino et al., 2020).

In this context, institutional governance plays a central role in coordinating the different actors involved in the wine and tourism chain. Research by Dolci et al. (2023), Tonietto et al. (2022), and Manfio et al. (2019) highlight the importance of viticulture as an alternative for diversifying agricultural activities, traditionally associated with low added value, in addition to highlighting its contribution to regional development, job creation, the establishment of wineries, and the expansion of rural tourism (Dolci et al., 2023; Tonietto et al., 2022; Manfio et al., 2019).

According to Santini et al. (2021), the structure of the wine chain should be understood as an ecosystem that integrates input suppliers (such as winegrowers, seedling and fertilizer producers), wineries, distributors, regulatory institutions, and consumers. Mapping this ecosystem reveals logistical bottlenecks, information asymmetries, and opportunities for value addition, providing important inputs for public policies and territorial development strategies.

In Brazil, viticulture has a significant socioeconomic impact, with a relevant share in the generation of direct and indirect jobs. According to Pereira (2021), the production chain can be segmented into three main links: primary (grape production), industrial (processing and winemaking), and tertiary (logistics, distribution, and marketing). Efficient integration between these links is crucial to increasing the sector's competitiveness.

The strengthening of national viticulture has been driven by Geographical Indication (GI) policies, which already recognize more than nine wine-producing regions in Brazil by 2024, giving greater territorial value to products (INPI, 2024). At the same time, the National Wine Register, implemented in 2023 by the Ministry of Agriculture (MAPA) and Embrapa, seeks to systematize information on grape production in the country, offering technical and statistical support for public policy planning (MAPA, 2023). According to IBGE (2023), Brazilian grape production reached 1.58 million tons, of which about 48% was used for winemaking.

In Rio Grande do Sul, the country's main wine-producing region, the 2021 harvest recorded 735 million kilograms of grapes (UVIBRA, 2022). The National Wine Register identified more than 1,100 active winegrowers in this state and an area of over 13,000 hectares under cultivation, mainly with American and hybrid cultivars (MAPA, 2023). In the Campanha Gaúcha region, in particular, mapping of the chain highlighted the importance of institutional coordination between producers, cooperatives, and development agencies, consolidated with the recognition of the "Vinhos da Campanha" GI.

According to Corrêa et al. (2022), "territorial governance was decisive for the consolidation of a competitive wine hub in the Pampa biome." Currently, the Campanha Gaúcha region stands out both for its volume—with an average production of 10 million bottles of wine per year—and for its quality, generating more than R$ 500 million annually (Associação Vinhos Da Campanha Gaúcha, 2022).

This raises the following question: what are the potentialities and challenges of the wine production chain in the Campanha Gaúcha, and how can coordination

between its agents and links contribute to strengthening territorial identity, productive inclusion, and the long-term sustainability of the sector? Based on the assumption that wine production in the Campanha Gaúcha has high potential for economic and territorial development, supported by regional identity and GI recognition, its consolidation depends on institutional coordination between the different links in the chain, overcoming logistical bottlenecks, and implementing public policies that promote integration, competitiveness, and socio-environmental sustainability.

Given the following issues, the objective of this study is to map the wine production chain in the Campanha Gaúcha region and analyze the prospects for its development. The structure of the study is organized into five stages: introduction; theoretical basis; materials and methods; analysis and discussion of results; and, finally, conclusions.

2 Systemic View of Agroindustrial Systems (SAGs)

The first discussions on the concept of agribusiness began around 1957, by scholars John Davis and Ray Goldberg at Harvard, giving rise to the concept of "agrobusiness," which today has the same meaning as agribusiness. Davis and Goldberg (1968) expand on the concept of agribusiness by adding the participation of actors involved in all agricultural spheres, in the production, processing, and distribution of a product in the theoretical aspect of the commodity system approach.

The view of Agroindustrial Systems (SAGs) is directed toward an institutional and economic structure composed of interdependent segments, whose analysis requires a systemic and integrated view of agri-food chains" (Zylbersztajn, 2005, p. 388). For Zylbersztajn and Farina (1999), SAGs are organizational networks composed of various agents that operate in a coordinated manner throughout the production chains, from the production of inputs to final consumption.

Thus, SAGs are complex structures formed by networks of economic agents that act in a coordinated manner around agri-food production chains. These systems encompass everything from the production of inputs to the processing, distribution, and consumption of agricultural and agro-industrial products, with the aim of generating added value throughout the chain (Batalha, 2012; Zylbersztajn; Farina, 1999).

The dominant logic is that of economic efficiency, verticalization, and standardization of processes, with a strong presence of agroindustry and large-scale logistics. Thus, "agroindustrial systems are structured as chains coordinated by contractual or vertical mechanisms, with a focus on productivity, food security, and access to global markets" (Wilkinson, 2021, p. 344).

Therefore, Alternative Agri-Food Systems (AAFS) emerge as a critique and alternative to the hegemonic model of AFS. They prioritize local production, agroecology, short marketing circuits, and social relations based on solidarity and sustainability (Hinrichs, 2021; Grisa; Schneider, 2020). In these systems, the links in the chain are articulated by networks of trust and territorial governance.

AFSs are built on the basis of valuing territories, food culture, and social cohesion, in contrast to the logic of globalized agribusiness" (Grisa; Schneider, 2020, p. 48). From the perspective of production chains, SAGs tend to be linear, hierarchical, and oriented by large corporate players, while SAAs take on more horizontal, decentralized, and territorially contextualized forms (Filippi; Souza, 2022).

The analysis of filières is also fundamental to understanding vertical coordination and power structures in agro-industrial chains, where the focus is on the succession of vertically associated activities necessary to produce related products. This transformation occurs through a commodity ready for the buyer (Davis; Goldberg, 1968). That said, this perspective is useful both for economic diagnoses and for the formulation of public policies and territorial development strategies.

2.1 The wine production chain

A production chain consists of a system composed of multiple interconnected and interactive elements and processes, including production systems, suppliers of inputs and services, processing and manufacturing, distribution and marketing agents, and the supply of goods and services to the end consumer. According to Zylbersztajn and Neves (2000), this set of processes is linked by common interests and objectives, forming a system and subsystem.

According to Farina (2000), when analyzing a chain, it is necessary to consider a number of factors, among which the following stand out: (a) factors related to the macrostructure in which the chain is inserted, restrictions imposed due to this structure; (b) different types of processes that occur in the chain, such as buying and selling, exchanging information, establishing and renegotiating agreements, etc., and (c) the behaviors of the actors that form the chain, as well as the organizations linked to it. Batalha (2021) demonstrates that agro-industrial chains can be segmented, and this segmentation can vary according to the objective of the analysis and the product being analyzed.

This makes it possible to find flaws or potentialities and identify bottlenecks, market strategies, and all movements in the chain (Farina, 2000). In this vein, institutional governance in production chains concerns the coordination and control mechanisms that regulate interactions between the links in the chain.

According to Gereffi (2020, p. 103), "governance in production chains represents the way in which power, information, and control relationships are organized throughout the chain, influencing the distribution of value and access to markets." In short, it involves contracts, standards, public policies, formal and informal institutions, as well as forms of cooperation and power among agents.

According to Triches, Siman, and Caldart (2004), the basic links in the chain are characterized by nurseries, grape producers for wine production, and wineries that process grapes for wine production. Between these two ends are the channels for marketing and distribution of raw materials, passing through processing and industrialization units and again the distribution of products to wholesale and retail marketing or direct sale to the final consumer.

That said, understanding the production chain involves investigating the complexity that surrounds all stages of the chain as well as governance, i.e., from wine producers, tourism agencies, public authorities, local communities, and even

other actors in the territory. This context drives not only the transformation of the wine production chain, but also the narratives, hospitality, and cultural identity (Pencarelli et al., 2021).

2.1.1 Stages of the wine production chain

According to Sarmento (2017), the production chain begins with the establishment of vineyards, which includes nurseries, suppliers of certified seedlings, fertilizers, pesticides, irrigation, and genetic technology. This stage directly influences the quality of the vineyard and the sustainability of cultivation. According to Rizzon et al. (2020), the genetic origin of the vine and the inputs used in production have a direct impact on the quality and traceability of the wine.

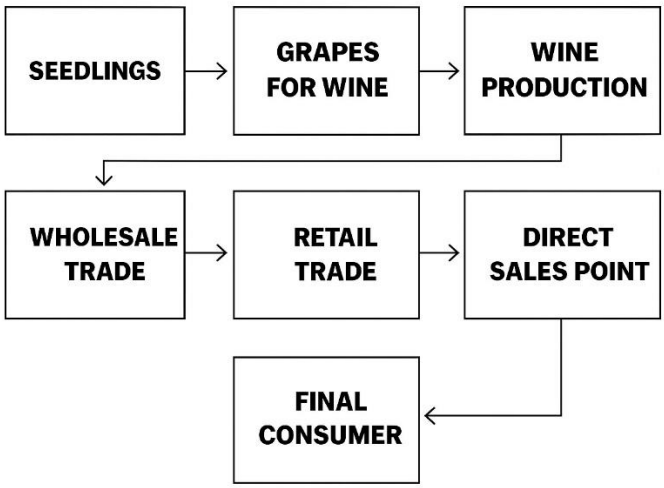
The second stage is grape cultivation, which includes activities such as fertilization and pruning, where vineyard management takes place. Factors such as terroir, climate, pruning, and harvesting practices determine the characteristics of the grape. According to Tonietto and Pereira (2022), viticulture is the basic link in the chain and largely determines the oenological potential of the grapes.

The third stage refers to harvesting and winemaking, comprising the processes of fermentation, aging, and stabilization. This stage is technically complex and involves decisions that affect the style, quality, and durability of the wine. In other words, winemaking is the heart of the production chain, where the symbolic and sensory value of wine begins to be constructed (Pencarelli et al., 2021).

The next stage concerns the bottling process, with the wine entering a bottling machine, from where it is transferred to the bottle, including labeling, use of bottles, corks, boxes, and product design. This is an essential stage for market positioning and consumer perception of value. According to Alonso and Liu (2021), packaging is a strategic part of sensory wine marketing, influencing purchasing decisions and perception of quality.

Finally, after the aging process in bottles in cellars, the final stage is distribution and consumption, covering phases such as the choice of supply channels (retail, e-commerce, export, distributors, specialty stores, and direct sales at wineries), including marketing and commercialization strategies (Sánchez-Pérez et al., 2023). Finally, there is the consumption and wine tourism stage, where the end consumer can experience the product in different contexts, including visits to wineries, tastings, and wine tourism experiences. Thus, wine tourism adds value to the chain by connecting the consumer to the origin of the product and the stories surrounding it (Mitchell; Hall, 2020). Figure 1 illustrates the central structure of the wine industry chain composed of its links.

Figure 1 - Structure of the grape and wine chain



Source: Prepared by the authors (2023) based on Triches, Siman, and Caldart (2004).

The production chain approach allows us to understand all stages, from grape cultivation and winemaking to consumption and the tourist experience, and how wine tourism is linked to the various stages of wine production. Thus, this study aims to understand a coordinated set of activities ranging from the production of agricultural inputs to the marketing and final consumption of wines and their derivatives.

2.2 The Organizational Environment

Institutional economics theory assumes that the organizational environment is composed of formal and informal institutions that shape the behavior of economic agents and organizations. According to North (1990), these institutions define the "rules of the game" by influencing incentives, transaction costs, forms of coordination, and the stability of productive systems.

Institutions are determining factors in the performance of rural organizations. Therefore, to understand the dynamics of the rural world, it is essential to understand human behavior, which is expressed in the habits, actions, and rules established by individuals, and their relationship with time (Viana et al., 2020). According to the authors, productive systems are formed by a complexity of institutions, which have been shaped over time through the sharing of habits, traditions, and cultures (Viana et al., 2020).

The organizational environment, therefore, refers to the set of external and internal conditions that influence the functioning of organizations within a productive chain. Azevedo (2000) points out that agencies and institutions, which act as stimulators and regulators of productive activity, are structures created to support the functioning of the chain, such as research institutes, associations, and government agencies.

For Porter and Kramer (2021), the organizational environment in production chains is dynamic and directly affects the efficiency, innovation, and ability of companies to adapt to the challenges of the global market. From this perspective,

the organizational environment is not neutral: it shapes economic incentives and affects the efficiency of organizations by conditioning their strategic choices, their adaptability, and their contractual arrangements.

That said, this environment includes institutional, technological, market, regulatory, and sociocultural factors that shape strategies, structures, and relationships between economic agents. In this vein, institutional governance is also related to territorial development and the strengthening of local production chains which, according to Wilkinson (2021), the success of public policies and productive arrangements depends on strong local institutions, cooperation networks, and the participation of local actors.

Based on this, understanding the institutional environment enables actions and policies aimed at greater efficiency in production, reduction of risks and uncertainties, and also in conflict management (Valle; Dorr, 2020). Furthermore, according to Scott (2014), the institutional environment influences organizations, and its analysis contributes to understanding the insertion of organizations in global or territorial value chain contexts.

That said, building efficient institutional governance in production chains requires coordination between the state, the market, and civil society, with a focus on inclusion, sustainability, and territory (Wilkinson, 2021). Thus, the organizational environment is both an economically regulated space (costs, contracts, incentives) and a symbolic institutional field, where actors seek recognition and acceptance by adhering to practices considered legitimate in that territory.

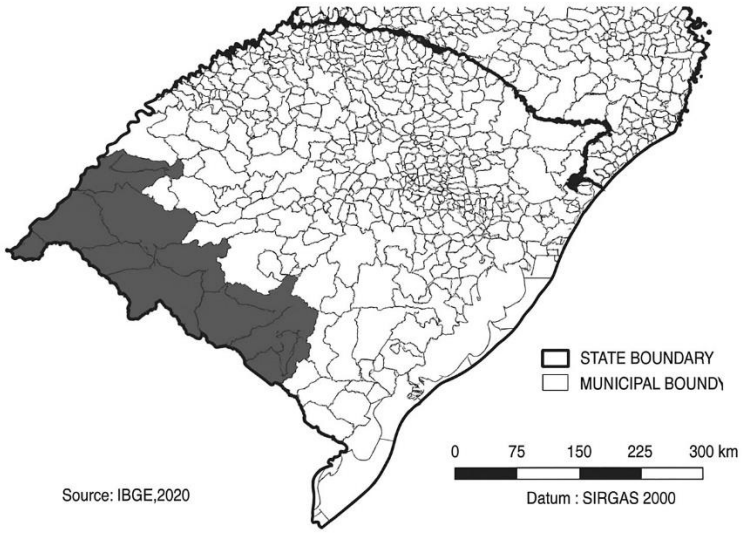
3 Materials and Methods

In terms of the type of research used to achieve the research objective, this study is classified as qualitative, exploratory-descriptive in nature. According to Stake (2011), qualitative research does not use statistical data analysis; descriptive data is obtained through this method. This study is defined as exploratory-descriptive because it aims to obtain more information on the subject, thereby facilitating further studies.

Exploratory studies generally serve to familiarize the researcher with a subject about which they have questions. Just as exploratory studies serve primarily to discover and hypothesize, descriptive studies are useful for accurately showing the angles or dimensions of a context or situation (Sampieri, Collado; Lucio, 2013).

The Campanha Gaúcha region is located in the Pampa Biome, in the southwestern part of the state of Rio Grande do Sul, a wine-growing region that began to strengthen in the 1980s. The area represented by the Campanha Gaúcha Wine Association consists of the territories of the following municipalities: Aceguá, Barra do Quaraí, Candiota, Hulha Negra, Itaqui, Quaraí, Rosário do Sul, Santana do Livramento, and Uruguaiana. In addition to some districts that are part of the following municipalities: Alegrete, Bagé, Dom Pedrito, and Lavras do Sul (IBGE, 2020), as shown in Figure 2.

Figure 2 - Location map: Municipalities where the Associação Vinhos da Campanha operates



Source: Prepared by the authors (2023), based on IBGE (2020).

The local vegetation provides favorable conditions for pastoral activities, along with annual crops. Extensive livestock farming has been established in the region for over 300 years, and is therefore present in the regional culture and tradition, as well as contributing to the income of many families (Sarmento, 2017).

According to data from the Brazilian Institute of Geography and Statistics (IBGE, 2010), agriculture and livestock farming are very important to the local economy and represent a larger share than the state average. While the state average for the sector is 8% of Gross Production Value (GPV), COREDE Campanha accounts for 17.2% of GPV. However, industry has a less significant share than the state average, which represents 25.2%, while COREDE Campanha accounts for only 20.6% (IBGE, 2010).

Data collection was carried out through semi-structured interviews which, as indicated by Stake (2011), aid in the understanding of social phenomena. To identify the interactions between the segments of the wine chain, 21 interviews were conducted with winegrowers or agents linked to wineries, which are part of the Associação Vinhos da Campanha (Campanha Wine Association). These wineries were chosen because they account for 31% of all red wine produced in Brazil (EMBRAPA, 2021). Table 1 shows the mapping of the wineries that make up the Associação Vinhos da Campanha and their respective locations.

Table 1 – Mapping of wineries that make up the Vinhos da Campanha Association (2023).

Winery	**Municipality**
Almabaska	Santana do Livramento/RS
Almadén (Miolo)	Santana do Livramento/RS
Batalha Vinhas & Vinhos	Candiota/RS

Bodega Sossego	Uruguaiana/RS
Bueno Wines	Candiota/RS
Campos de Cima	Itaqui/RS
Cerros de Gaya	Dom Pedrito/RS
Cordilheira de Santana	Santana do Livramento/RS
Dunamis	Dom Pedrito/RS
Estância Guatambú	Dom Pedrito/RS
Estância Paraizo	Bagé/RS
Nova Aliança Coop.	Santana do Livramento/RS
Peruzzo Vinhas & Vinhos	Bagé/RS
Pueblo Pampeiro	Santana do Livramento/RS
Routhier & Darricarrère	Rosário do Sul/RS
Salton	Santana do Livramento/RS
Seival Estate (Miolo)	Candiota/RS
Vinhética	Santana do Livramento/RS

Source: Prepared by the authors (2023), based on data from Associação Vinhos da Campanha.

The interviews with wine industry stakeholders were conducted virtually, using open-ended questions sent in a Word file via email and Google Meet, between September and November 2023. Representatives from some of the main institutions linked to the sector were also interviewed, according to the collection instrument, namely: Brazilian Agricultural Research Corporation Grape and Wine; Technical Assistance and Rural Extension Company; and Federal University of Pampa. Table 2 shows the agents involved in the field research.

Table 2 - List of agents involved in the research.

Agents	Collection instrument	Analysis technique
15 winegrowers (A) 3 institutional actors: Embrapa (B); Emater (C); Unipampa (D) 3 organizational actors: producers' association (E) and union (F)	Semi-structured interview	Content analysis

Source: Prepared by the authors (2023).

Content analysis (Bardin, 2011) was used to analyze the data, whereby the entire data set was transcribed and organized into categories defined a priori, in line with the research objective and theoretical framework. The categories of analysis are presented in Table 3.

Table 3 - Categories of analysis.

Category	Dimensions	Description	Authors
Production Chain	**Economics**	Main producing regions; Import and Export; Economic relevance.	Sarmento (2017); Silveira and Protas (2021)

	Organizational environment	Stimulators and regulators of productive activity.	Azevedo (2000); Viana et al. (2020); Dalla Valle and Dorr (2020).
	Description	Characterization of component segments; Interrelationships between actors.	Zylbersztajn; Neves (2000) Batalha (1997).

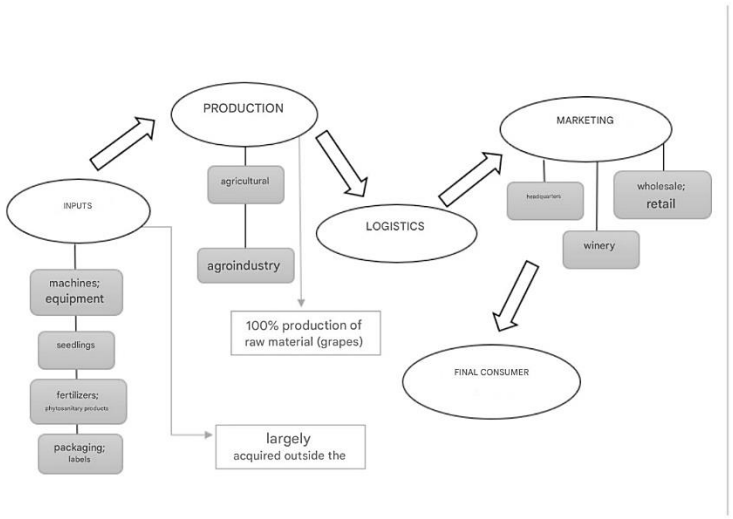
Source: Prepared by the authors (2023).

4 Results and Discussions

4.1 Mapping the wine industry chain

The wine production chain in the Campanha Gaúcha region is composed of various agents and links, each with its own individual role, which will be discussed in this section. Figure 3 shows the upstream and downstream characterization corresponding to the wine production chain in the Campanha Gaúcha region.

Figure 3 - Organization chart of the wine production chain in the Campanha Gaúcha region.



Source: Prepared by the authors (2023), based on survey data.

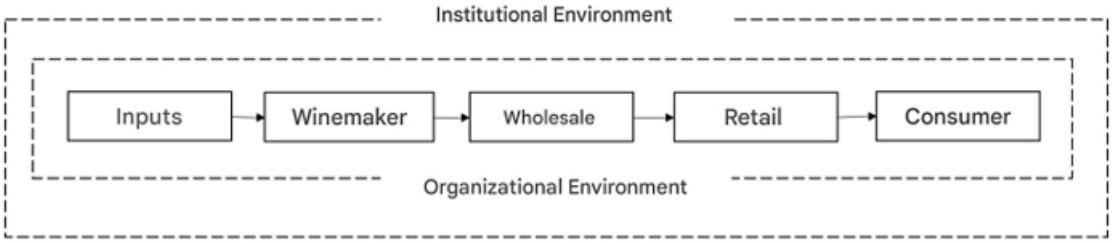
The data reveal that wineries are integrated, meaning that the producer and processor are the same entity. According to studies conducted by Pomarici et al. (2020), the wine industry chain integrates agricultural and industrial activities in a continuous process involving multiple agents, such as rural producers, cooperatives, wineries, distributors, and consumers.

However, according to the research data, in some cases analyzed, the winery is unable to produce all the grapes it needs and therefore purchases grapes from third parties, in this case, winegrowers linked to the producers' association. One of the justifications presented refers to the quality of the grapes, a determining factor for the quality of the final product (the wine).

> "As everyone knows, grapes are the basic raw material for wine, and they are the biggest determinant of wine quality. Therefore, it is essential that you harvest high-quality fruit to ensure a good final product" (Interviewee A.4).

In this sense, it is essential to have greater control over the origin of the fruit in order to ensure high levels of quality, even if this means increased production costs. Figure 4 illustrates the integration between the links in the production chain.

Figure 4 - Integration of wine production and industrialization.



Source: Prepared by the authors (2023).

One of the main links in the wine production chain is the suppliers of inputs. In this study, most of the fertilizers, pesticides, packaging, corks, and industrial and agricultural equipment are not purchased regionally, but rather in other regions of the state and country, such as the Serra Gaúcha region. Table 4 shows the location of the main suppliers of inputs for vineyards.

Table 4 - Location of main suppliers

Products for vineyards	**Location of main suppliers**
Pesticides	*Serra Gaúcha; São Paulo; Paraná; Santa Catarina.*
Chemical fertilizers	*Porto de Rio Grande; Norte do Rio Grande do Sul; Região da Campanha Gaúcha.*
Organic fertilizers	*Serra Gaúcha; Norte do Rio Grande do Sul.*

Source: Prepared by the authors (2023), based on survey data.

The interviewee (A.2) adds that, "with the popularization of the internet, some purchases are also made online, but on a smaller scale," usually limited to products that are new to the market or have more attractive prices and that arouse the producer's curiosity to try them out. Corroborating this, the authors Nunes et al. (2024) point out that public policies aimed at rural areas have driven innovative initiatives in family agribusiness, contributing to the emergence of "productive innovations" and the consolidation of a dynamic regional agri-food system with potential for expansion via digital markets.

With regard to joint purchases, there are some initiatives with the producers' association that carry out group quotations and purchases, with the aim of increasing volume and thus reducing the final price. However, the practice only covers products used in vineyards, as each winery has its own particularities for the products it uses.

As for labor, based on the establishments interviewed, the average number of formal employees in wineries is approximately nine. It was mentioned that some larger companies have mechanized harvesting, reducing the demand for labor. When there is less work in the fields, workers can engage in other activities or operations.

Regarding Technical Assistance (ASTEC), all interviewees stated that they have some type of professional who monitors production, either in their own vineyard or in another winegrower's vineyard. The specialty/training of ASTEC is restricted to Agronomists, Agricultural Technicians, or Oenologists.

In this sense, 100% of the wineries showed great concern for the quality of grape production, ensuring care in the production and processing stages through technical monitoring. Thus, all of them have specialized Technical Assistance to monitor quality control, first of the grapes and then of the wine production.

4.1.1 Processing, marketing, and consumption

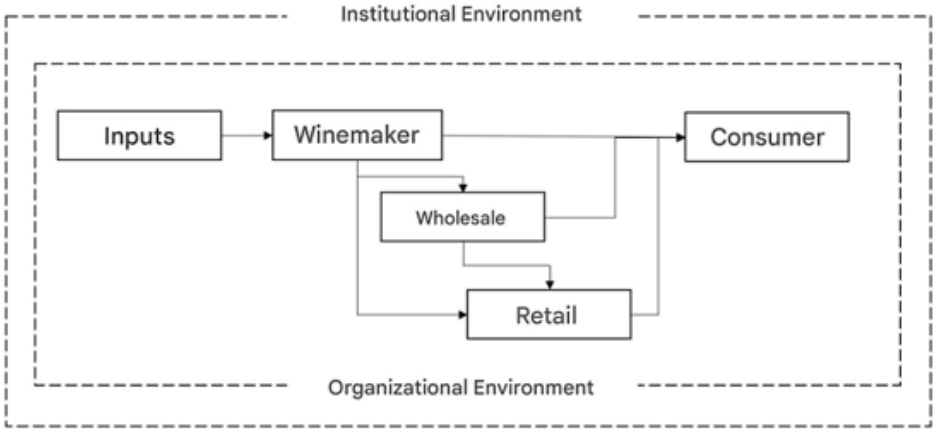
Wineries process wine at their own facilities or in partnership with local wineries, sending fresh grapes to the Serra region to be vinified at the company's headquarters. According to interviewees, the municipality of Bento Gonçalves is the main destination for processing. The processing stage can be considered a bottleneck in the chain, given that an effective logistics process is necessary to ensure product quality.

Research conducted by Ferreira (2018) argues that grape processing is a critical stage in the wine chain, directly influencing the quality and added value of wines. As observed, in Santana do Livramento (RS), for example, only Vinícola Cordilheira de Santana carries out the entire winemaking process locally, from cultivation to bottling.

Other companies in the region send their production to Serra Gaúcha for finalization, highlighting logistical and structural challenges. As pointed out by Gomes and Ribeiro (2020), transportation (downstream and upstream) is a link that loses competitiveness. In this regard, logistics is a determining factor for the chain, as it tends to compromise quality, and consequently, the producer may see their profitability reduced (Gomes; Ribeiro, 2020).

With regard to marketing, wines are sold at direct points of sale, such as at the winery itself or wholesale and retail, with all wineries having some direct point of sale. However, less than half of those interviewed also sell wholesale and retail, as shown in Figure 5.

Figure 5 – Marketing and distribution



Source: Prepared by the authors (2023).

That said, one of the reasons highlighted by respondents with regard to marketing and distribution is their low bargaining power vis-à-vis large chains, which seek to reduce the price paid to producers, as well as the fact that some wineries do not have high production volumes and therefore prioritize direct sales to consumers. Thus, one of the strategies used by winemakers is to sell in differentiated stores that cater to a public that values the differentiation of wines.

The exclusive use of direct sales is a strategy adopted by most of the wineries interviewed, which only market their products at direct points of sale, where the producer approaches the subsequent links in the chain. Based on this analysis, the producer's potential to formulate their knowledge frames them as capable of creating innovations, making new adjustments and adaptations in the production process (Nunes et al., 2023).

Similar studies indicate that the marketing of wine products faces challenges related to logistics and market structure. According to De Souza et al. (2025), in Espírito Santo, the grape production chain has potential for expansion but lacks effective marketing strategies to reach broader markets.

According to Nunes et al. (2018), the adoption of more advanced technological and management practices that are internalized in the territory can constitute a cutting-edge action in rural development dynamics. From this perspective, Gazolla et al. (2018), in their studies, point out that agro-industrial systems have lower production costs compared to other local experiences and higher levels of added value and profitability, thanks to the combination of ecological production and agro-industrialization. This corroborates the findings of this research, where wine tourism generates added value for the region.

De Rosa et al. (2024) investigated how Italian farmers, cooperatives, and associations structure their marketing practices in short chains (such as fairs, local markets, their own stores, and digital channels). The authors reveal that value creation in short chains depends not only on the product, but also on the ability to build a symbolic and territorialized experience, aligned with sustainability and cultural identity.

In addition, according to the interviewees, an opportunity that has grown significantly in the region is wine tourism, where consumers and/or visitors can visit wineries and, in some cases, have the option of staying on site and tasting wines, as well as immersing themselves in the history and identity of the winery. The study by Dolci et al. (2023) shows that wineries (organizations) that offer wine tourism experiences know how to take advantage of opportunities within the institutional matrix to develop this activity in their organizational context.

Studies indicate that the experiences of tourists in wine regions positively influence their perceptions and consumption behaviors (Gómez-Carmona et al., 2023). The quality of service, the authenticity of the experiences, and the connection with the local culture are determining factors for visitor satisfaction.

In addition, Londoño and Barton (2024) highlight that the identification of wine landscapes is a central element of wine tourism experiences, in addition to visits to wineries and wine tastings, and emphasize the role of wineries as drivers of territorial development. In this vein, Sthapit et al. (2024) mention that territorial experiences, such as landscape and hospitality, affect the perception of wine and willingness to pay, while connecting tourism, identity, and value.

Turčinović et al. (2025) emphasize the collective construction of wine tourism itineraries in small communities, strengthening territorial identity and local empowerment. Vaquero-Piñeiro et al. (2025) address in their studies that wineries are more likely to seek agrotourism activities than other farms, with high-quality wine producers offering a more diversified tourism option.

4.2 Organizational Environment

When addressing the organizational environment, different agents involved in the wine production chain in the Campanha Gaúcha region were observed, as shown in Table 6.

Table 6 - Organizational Environment of Wine Production in the Gaucho Region

Institution	Responsibilities
Ministry of Agriculture, Livestock, and Supply (MAPA)	It is a public institution that manages public policies to stimulate agriculture and promote agribusiness.
Union	It aims to increase productivity, seen as an observed demand, through the adoption of improvements in work methods and processes, guiding activities in the field.
Brazilian Agricultural Research Corporation - Grapes and Wine (EMBRAPA)	They enable technological solutions to maintain the competitiveness and sustainability of the Brazilian wine industry through scientific studies and research. In the case of viticulture, they develop research initiatives to improve management and processes. An example of this is the structuring of the IP Vinhos da Campanha project.
Brazilian Company for Technical Assistance and Rural Extension (EMATER)	They work to increase production, productivity, and product quality for the families they assist, as well as planning and managing the UPAs. This is achieved through training, courses, and technical assistance, for example.
Federal University of Pampa (UNIPAMPA)	They produce scientific knowledge and interact with society through teaching, research, outreach, and innovation. In addition, they were responsible for implementing wine tourism models in the region.

Source: Prepared by the authors (2023), based on survey data.

Based on the data obtained, there are several organized entities that aim to represent the interests of producers. First, at the municipal level, there are unions that support rural producers, providing information and contributing to the most diverse needs of agricultural management. These are entities that work closely with rural producers.

At the national level, among associations and institutional bodies, it is worth noting that the Brazilian Viticulture Union (UVIBRA) is responsible for the institutional organization of production, commercialization, and promotion of the Brazilian production chain within and outside the national territory. At the regional level, the Campanha Wine Association has the central objective of strengthening and promoting the wine culture of Campanha.

From this perspective, institutions that do not promote autonomous adaptations but favor some type of coordination and play a crucial role in territorial governance, especially in contexts where wine tourism is an emerging activity, are

responsible for establishing regulatory frameworks, fostering cooperation among local actors, and promoting development strategies that integrate wine production with tourism. According to authors Valle and Dörr (2020), the agencies and institutions that act as promoters and regulators of the activity also operate within the structures created to support the functioning of the chain.

It is important to highlight that all interviewees emphasize the importance and role of the Associação Vinhos Campanha Gaúcha (Gaucho Wine Association) in representing the interests of winegrowers, which is considered a key player in the development of the production chain. According to Pinheiro (2001), associationism is a possibility for enabling economic activities, offering a means of market participation under more competitive conditions.

Through cooperation between partners, the production and marketing of certain products or services can be more profitable, given that the objective of an association is to build a collective structure that benefits all participants. According to the author, the central objective of this organizational model is not economic activity itself, but rather to defend the interests of the group and seek solutions to its impasses (Pinheiro, 2001).

The organizational environment and efficient institutional coordination allow for the integration of tourism, production, and cultural heritage, promoting balanced development. That said, territorial governance based on local institutions favors processes of social innovation and the consolidation of food and wine tourism destinations (Sonnino; Marsden, 2021).

Based on the data, it was observed that territorialized viticulture refers to wine production that values the specific characteristics of a region, such as climate, soil, cultural practices, and local history. According to interviewees, wineries not only value product quality but also the strengthening of regional identity and sustainable socioeconomic development.

In this approach, Sánchez-García et al. (2025) reveal in their studies of Argentine wineries that wine tourism drives territorial competitive advantages based on authenticity, heritage, and immersive experiences. For authors Camprubi and Goncalves (2025), the importance of external ties, different levels of competitiveness, website performance, and geographical differences contribute to the formation of strategic alliances between wineries and tourism as a means of strengthening destinations and expanding markets.

Chamusca (2023) argues that it is necessary to create networks and partnerships, use smart specialization strategies, and promote sustainable tourism, with greater collaboration between different levels of government and stakeholders, increased investment in infrastructure and innovation, and the development of more sustainable tourism strategies being essential.

That said, institutional governance within agri-food production chains, specifically the Wine Production Chain, reveals deep tensions between economic efficiency and the principles of territorial justice. This justice refers to the equitable distribution of resources, opportunities, and rights to participate in the development of territories, recognizing the diversity of agents, cultures, and rural ways of life (Santos; Silveira, 2021).

In the context studied, producers who occupy the most fragile links in the chain-especially in family-based sectors-are often the most impacted by market

fluctuations, the absence of formal contracts, and the lack of infrastructure. To this end, public policies play an essential role in mediating these inequalities and rebuilding weakened links, acting both through productive development and social organization.

For Belletti, Marescotti, and Touzard (2021), geographical indications are not only economic tools, but also social and cultural ones, capable of reinforcing territorial identity and promoting sustainable rural development. In the academic debate, there is a tension between the standardization of production processes for access to the global market and the preservation of local characteristics that give authenticity to the product, highlighting the need for public policies that support the training of producers and the protection of traditional knowledge.

Stranieri et al. (2024) investigated how Geographical Indication (GI) and technological innovation interact to shape the competitiveness of wine-producing regions in Europe, highlighting trade-offs between tradition and modernization. The authors point out that the presence of GI in a given geographical area encourages innovation outside production specifications and facilitates the production, preservation, and management of the production process of certified products.

Therefore, the consolidation of viticulture in the Gaucho countryside depends not only on the enhancement of its territorial identity, but also on a political project that integrates social justice, institutional strengthening, and socio-environmental sustainability as long-term pillars.

In this sense, public policies play a strategic role in mitigating such weaknesses, promoting greater integration of the links in the chain and fostering long-term sustainability. Measures to encourage regional logistics infrastructure, specific credit lines for small winegrowers, technical training programs, and the strengthening of cooperatives can contribute to reducing external dependence and expanding productive inclusion.

Thus, expectations are for the strengthening of the production chain and the growth of wine tourism, an activity that has been gaining prominence as it promotes the consumption of domestic wine, assists in the expansion of wineries, and promotes regional development, strengthening employment and income for the region, which traditionally has its agricultural activities focused on the production of rice, soybeans, and beef cattle. The interviewees' projection is for the evolution of the chain, which is attracting more investments every day.

Therefore, through territorial identity, the aim is to add value to products in globalized markets, as is the case with the wine production chain in the Campanha Gaúcha region. To this end, it is necessary to adopt legal instruments that link agri-food products to a specific territorial origin, recognizing unique characteristics related to terroir, local knowledge, and traditional practices, as is the case with GI.

In general, the wine production chain in the Campanha Gaúcha region has made significant progress in terms of territorial recognition and value-added generation, but still faces challenges related to territorial justice and productive inclusion. The strong dependence on inputs, equipment, and processes from other regions exposes the fragmentation of local links and limits the territory's ability to fully capture economic benefits.

This situation reinforces inequalities in the distribution of opportunities, as small producers and local workers have less access to technological and logistical

resources, which hinders the consolidation of a more inclusive and resilient productive base. Critically reflecting on territorial justice implies questioning not only the Campaign's insertion in the national and international market, but also the internal equity of its chain, so that economic and social gains are not concentrated in a few agents.

5 Final Thoughts

The objective of this study was to map the wine production chain in the Campanha Gaúcha region. It was possible to identify that in Brazil, wine culture is constantly evolving, due to natural resources favorable to grape production. The choice of variety and type of wine to be produced is strongly influenced by the location of the vineyard and, in this sense, the particularities of the Campanha Gaúcha favor the rise of fine wine production.

Regarding the interaction between the agents that make up the links in the production chain, it is worth noting that the chain depends on other regions and even countries to carry out and/or complete the production, marketing, and distribution processes. Most of the inputs, equipment, and packaging are not supplied locally. Some wineries need to send their wines to regions such as Serra Gaúcha to be bottled, which can represent a bottleneck in the chain and losses to the local economy.

It is clear that viticulture is expanding in the region, with many producers stating that they will continue their investments in grape and wine production, given the climate and terrain conditions. The region's climate allows grapes to ripen, as well as reducing the need for pesticides and thus lowering production costs. The topography allows for mechanized harvesting, as most of the cultivation areas are on flat surfaces, which reduces harvesting time. Thus, it has some advantages over the Serra Gaúcha region, where most of the wineries in Rio Grande do Sul are located.

With regard to the organizational environment, the role played by institutions and organizations is of great value, given all the actions taken to strengthen the segment. As a result, they obtained the Geographical Indication in 2020. This achievement with the INPI was the result of the organization of the Association of Fine Wine Producers of Campanha, scientific research by Embrapa, universities, and other entities mentioned in this study.

In this sense, it can be concluded that despite some weaknesses, such as infrastructure and logistics, the production chain has prospects for growth and overcoming these weaknesses over the years. A suggestion for future studies is the possibility of quantitatively measuring the socioeconomic impacts of the production chain on local development, as well as proposing public policies to promote the segment.

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