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Construction and operationalisation of sectorial brands: The case of the Brazilian winemaking sector from the perspective of different stakeholders

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Abstract

The objective of this article is to understand the process of construction and operation of sectorial brands (a type of shared brand) for the Brazilian winemaking sector, considering the perspective of different stakeholders: government agencies, associations, and managers of the wineries. The research was exploratory and qualitative, using techniques such as direct observation and in-depth interviews. The results showed that gains of dissemination and image are foreseen with the participation of the Brazilian winemaking sector in international fairs, in relation to the external market. In relation to the domestic market, it is concluded that it is necessary to continue investing in actions and projects, with the participation of the associations and commitment of the producers so that the Brazilian consumer knows and consumes the national product. The contributions of this article show that government agencies, associations, and wineries understand that the brand of the Brazilian winemaking sector is contributing to the development of the sector and that these actions must be continued. Thus, the joint work of all stakeholders involved should seek to improve the production process and improve the quality of the products to be marketed in the internal and external market.

Keywords: Shared brands; Sectorial brand; Brazil winemaking sector

1. Introduction

The foundation of branding in the wine market relates to the idea that a consumer does not buy the wine, the bottle, the aroma, or even the taste but first, the idea of quality associated with the brand (Atkinson, 1999). Brands bring important signs of quality and potential to be barriers against competitors (Srivastava et al., 2001). According to Tregear and Gorton (2009), the concept of shared brands indicates brands that are shared by a collective, often having an association that represents them. These can be Geographical Indication, Collective Brands and Sectorial Brands. According to Castro and Giraldi (2015), sectorial brands in Brazil are projects developed and supported by the Brazilian Agency for the Promotion of Exports and Investments (Apex-Brasil - *Agência Brasileira de Promoção de Exportações e Investimentos*) with the aim of promoting products in the foreign market through trade fairs and other promotions.

Sectorial brands can be considered shared brands from the perspective of Tregear and Gorton (2009), because they represent a collectivity, even though in Brazilian legislation it is not necessarily mandatory that a sectorial brand be registered with the responsible body, the National Institute of Industrial Property (*Instituto Nacional da Propriedade Industrial*) - INPI (Barbosa et al., 2013).

In Brazil, sector brands are linked to sectorial projects developed by Apex-Brasil, which works with eight sectors of the economy: Food, Agribusiness, Home and Construction, Creative Economy, Machinery and Equipment, Fashion, Technology, and Health. Of each sector, there are specific projects for each type of product or service offered, totaling 65 projects

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in these 8 sectors. Apex-Brasil works with the concept of a sectorial project in order to promote Brazilian industry in the international market (Apex-Brasil, 2015).

Sectorial brands differ from collective brands because they encompass a global sector, such as the wine sector for example, and are relevant because they promote the entire industry both in the domestic market and in the foreign market. Collective marks, in turn, represent the union of a collectivity that does not always represent the entire sector in question.

Shared brands can be considered intangible resources to be developed internally by a sector, as in the case of the sectorial brand. Internal resources start from the logic of the Resource-Based View (RBV), which gained evidence in the field of strategy from the work of Wernerfelt (1984), with the notion that the company is made up of a set of resources and that resources produce effective strategies for the specific market.

A company or sector that purchases resources or wants to build them in-house can develop unique intangible assets such as sectorial brands that bring sustainable competitive advantage. Such thinking is aligned with the purpose of studying the construction of internal resources to the sector through the sectorial projects developed by Apex-Brasil.

Thus, the RBV can be a theoretical lens for the understanding of sectorial brands in the wine sector, since the development of sectorial brands as internal resources can leverage sales, brand promotion and lead to the reach of SCA with differentiation from the competition (Barney, 1991; Robinson & Lifton, 1993; Zamparini et al., 2010).

In this context, the objective of this article is to understand how the process of construction and operation of sectorial brands for the Brazilian winemaking sector takes place, considering the perspective of different stakeholders: government agencies, associations, and managers of the wineries. There are few works developed on shared brands - in particular sectorial brands - and integration of this resource is a source of sustainable competitive advantage in RBV. No additional work was identified than those found by Castro, Giraldi and Galina (2014), investigating whether the concepts related to the country brand/country image/country of origin can generate competitive advantage, lacking a concise framework that shows the relationship and the generation of competitive advantage from the development of these constructs.

The choice of the Brazilian winemaking sector is due to the fact that this sector has grown in the foreign market due to the quality of the fine wines produced, and promotional actions such as participation in fairs, which has brought Brazilian wine to the knowledge of consumers of countries that are already references in this product such as France, Spain, Portugal, and Italy (Copello, 2015).

In addition, the sector is highlighted in the national economy, being the first to obtain Geographical Indication in the Indication of Origin in 2002, and Denomination of Origin in 2012. The sector already has six certified regions, namely: *Vale dos Vinhedos*, *Pinto Bandeira*, *Monte Belo do Sul*, *Flores da Cunha*, *Farroupilha*, *Urussanga* and some collective brands such as *ACAVITIS*, *CPEG*, and *Vinhateiros do Vale*. Finally, there is the Wines of Brasil sectorial brand, developed as a sectorial project of Apex-Brasil in a joint work with the Brazilian Wine Institute (IBRAVIN - *Instituto Brasileiro de Vinhos*).

2. Sectorial brands

The study by Florek and Conejo (2007) shows that in the absence of historical traditions, wine producers in emerging countries use alternative means for the "brand of origin", focusing on rural bucolism. Thus, regional wine brands in some cases, such as Australia, are built and communicated with government assistance, linking the dissemination of local tourism with products produced in that region.

Orth et al. (2005) presents dimensions to measure the equity of the wine region as price, social, emotional and environmental function. These dimensions can help a regional brand of wines in the selection of target markets and brand positioning with competitive differentials such as uniqueness or superiority of wines. Origin preferences, wine benefits and consumer lifestyle are a tool to increase sales and market share.

The study by Bruwer and Buller (2013) looked at how the COO of wine brands can affect the buying behavior of Japanese consumers. The results showed that loyalty is more affected by consumption characteristics than demography, income, age and sex. It has been found that Japanese women have more specific education on the subject wines. As Bianchi et al. (2014) recall, building a strong brand is one of the strongest drivers of loyalty to wine consumers, and the sectorial brand can enhance identification and loyalty ties in a market where consumption is tending to decline as a result of increasing variety.

The McLaren Vale Australian wine brand study shows that regional promotion can bring benefits to all producers in the region by increasing sales. The region must be positioned so that the consumer understands the regional identity and style of wine produced (Phillips, 1992).

In other cases such as in Europe, communication is made by producer associations such as denominations of origin and quality, e.g. the *Consórcio do vinho Chianti Clássico* (Chianti Classico Wine Consortium) and the *Comitê de produtores de Champagne* (Comité Interprofessionnel des Vins de Champagne). Spain's collective wine brands develop and communicate the brand through advertising agencies that exploit the brand's reputation (Zamparini et al., 2010). The wines of Rioja are a case of Spanish success of a model of high economic efficiency and great corporate synergy of local organizations (Brémond, 2014).

The work of Robinson and Lifton (1993) shows the grape and wine industry in New York State in the 1980s and points out the concepts of Social Marketing and how the development of brands and collective actions can benefit producers and the environment, generating jobs for the local community.

Some studies on shared brands generally linked to the wine sector, such as the Vrontis and Papasolomou (2007) survey, recommend new forms of market development and penetration for the Cyprus wine industry brand, building its brand and improving practices in an increasingly competitive environment.

Often, products such as wine build a reputation through regionality and/or specialty (Alonso & Northcote, 2009).

3. Sustainable competitive advantage - the construction of resources in RBV

When thinking about shared brands, in particular the sectorial as a strategic resource, it can be noted that RBV research has improved over the years, consolidating a map that guided the work since Wernerfelt (1984), Dierickx and Cool (1989) and Barney (1986, 1991, 1995), and in sequence, Amit and Schoemaker (1993), Grant (1991) and Peteraf (1993), who collectively provided the basis for the development of area studies (Maritan & Peteraf, 2011).

According to Barney (2001), RBV can be seen in different ways, depending on the empirical context in which it will be applied. For the study of specific resources of a company to achieve sustainable competitive advantage, the predominant logic is to use the work of Barney (1991) associated with the works of Dierickx and Cool (1989) and Peteraf (1993) among others. In this way, what distinguishes RBV is not the differences in its application, but rather the shared criteria, and that these differences remain over time and help in explaining how companies perform better than their competitors (Barney, 2001).

Thus, in order to discover resources and capabilities, managers must examine the company internally, returning to resources that are valuable, rare and have a high cost of imitation, exploiting them to obtain a sustainable competitive advantage for the organization (Barney, 1995). Resources, in this perspective are understood as having an external and objective face and also an inter-subjective and symbolic face, due to the fact that resources and competences are also part of socially constructed reality. Resource is something that the company has and includes physical and financial assets, employees' skills, and the organizational process, which are internal and can be developed over time, and can have effects on the brand, image and visibility of the company (Crubellate et al., 2008; Hart & Dowell, 2011).

For Baker and Ballington (2002), at the moment the competition comes close to having a perfect substitute competitor in terms of price and quality, consumers begin to look at other attributes that help them choose between brands in different countries. When this analysis is performed, quality judgment based on the country of origin may influence the company's pricing decisions. Thus, it may also affect the achievement of competitive advantages or disadvantages in certain countries (Agrawal & Kamakura, 1999).

In the work of Dierickx and Cool (1989), it is clear that the characteristics that delineate the process of resource accumulation contribute to the difficulty of being imitated and the sustainability of competitive advantage, greatly influencing the RBV literature. Research on resource accumulation has started from the premise that markets for certain resources are incomplete; consequently, many resources are produced/developed internally, such as brand development, for example (Maritan & Peteraf, 2011).

In this way, intangible resources such as shared brands do not deteriorate with use, being able to manage several of these at the same time and are impalpable, which hinders the exchange and cannot separate the resource from who owns it. In this way, it is more difficult for competitors to imitate intangible resources such as the sectorial brand, for example (Molloy et al., 2011).

The study by Wilk and Fensterseifer (2003) was carried out in a cluster of wineries in southern Brazil to identify the resources and strategic capabilities of this cluster and the scope of SCA. The work comprised the links between the company's internal resources in the RBV vision and the collective, systemic and sectorial resources of the industry. Thus, the collective and shared resources in the cluster together with the strategies of the companies must be formulated from the point of view of the theory of resources and capacities.

In addition, the essential reason lies in the fact that the brand's intangible factor makes its copying very difficult because it involves unique elements developed by a corporation over time, with a peculiar organizational culture of its own. To avoid substitution by some competitor the corporation must continually invest its efforts, articulating investment strategies to protect the brand from its natural depreciation, with investments in performance, innovation, design and style (Balmer & Gray, 2003).

4. The Brazilian winemaking sector

The wine connoisseur has at his/her disposal more than 40 thousand labels from more than 30 countries. As Banks and Overton (2010) recall, such a complexity of options can no longer be distinguished in the traditional dichotomous classification between New World and Old World wines. Brazil, in this context, imports wines mainly from Chile, Argentina, Portugal and Italy. Brazilians have educated their palate in the last decades, consuming wines of Chile and Argentina, preferring full red wines, soft, fruity, woody and alcoholic, and preferably in imposing heavy bottles. And they also associate the experience of consuming wine to winter, fireplace and cheeses (Copello, 2015).

However, Brazil's average consumption is still below the world average, showing that there is growth space for the sector. In France, for example, the per capita consumption of wine is 45 l/year and in Brazil, on average, each Brazilian consumes 50 l of beer per year and 6 l of cachaça and only 2 l of wine in general (table and fine wine). If only fine wines are considered, per capita consumption is only 0.7 l/year (Copello, 2015).

A total of 212.01 million liters of table wine, 78.2 million liters of grape juice and 34.9 million liters of concentrated juice of American grapes are produced, being the fifth largest wine producer in the Southern Hemisphere. Brazil currently has 89 thousand hectares of production. There are approximately 150 wineries making fine wines scattered throughout the country. The Brazilian wine industry is still formed by about 1000 other wineries, most of them installed in small farms (an average of 2 ha per family), dedicated to the production of table wines or artisanal wines (Apex-Brasil, 2014; Farina and Roloff, 2015; Ibravin, 2014, Wines of Brasil, 2016).

Currently, wine production is already present in 13 Brazilian states: Santa Catarina, Paraná, São Paulo, Minas Gerais, Espírito Santo, Rio de Janeiro, Goiás, Mato Grosso, Bahia, Pernambuco, Ceará, Maranhão, and Rio Grande do Sul being the state which represents the epicenter of Brazilian wine production (Copello, 2015, Grizzo et al., 2015).

From this data of the winemaking sector, it can be said that the sectorial brand becomes an essential strategic resource to help the development and diffusion of the sector in the domestic market as well as in the external market.

5. Methods

The research was exploratory and qualitative, seeking information that would help to refine the research question in subjects that were little studied or were not studied previously, improving ideas or realizing intuitions (Cooper & Schindler, 2003; Sampieri et al., 2006). As for the technical procedures, the research was bibliographical, and direct observation and in-depth interviews were used. The direct observation allowed a contextualization of the studied scenario and direct contact with the owners and employees, collecting informal and indirect data that complemented the information verbalized through the interviews.

Interviews were conducted with Brazilian government agencies and associations such as SEBRAE, MAPA, INPI, Apex-Brasil represented by IBRAVIN and EMBRAPA UVA & VINHO (EMBRAPA GRAPE & WINE), APROVALE (Association of Fine Wine Producers of the Vale dos Vinhedos - *Associação dos Produtores de Vinhos Finos do Vale dos Vinhedos*), ASPROVINHO (Association of Wine Producers of Pinto Bandeira - *Associação dos Produtores de Vinho de Pinto Bandeira*), APROBELO (Association of Winemakers of Monte Belo do Sul - Associação dos Vitivinicultores de Monte Belo do Sul), APROMONTES (Association of Producers of Altos Montes Wines - *Associação de Produtores dos Vinhos dos Altos Montes*) and AFAVIN (Farroupilhense Association of Wine Producers, Sparkling Wines, Juices and Derivatives - *Associação Farroupilhense de Produtores de Vinhos, Espumantes, Sucos e Derivados*), CPEG, AVIGA (Association of winemakers of Garibaldi - *Associação dos Vinicultores de Garibaldi*) and SINDIVINHORS (Union of the industry of wine, grape must, vinegar and beverages derived from the grape and wine of the state of Rio Grande do Sul), and the Secretariat of Tourism of the City Hall of Garibaldi.

Lastly, the winery managers were interviewed, with 18 interviews in 15 wineries: Don Laurindo, Lídio Carraro, Miolo, Peculiare, Pizzato, Cooperativa Aurora, Valmarino, Faé, Fantin, Mioranza, Batistello, Cooperativa Garibaldi, Milantino, Casa Pedrucci and Vaccaro. Cooperativa Aurora, Cooperativa Garibaldi, Miolo and Mioranza have on average 900 ha of vineyards of their own and produce 20.000.000 l of wine per year. The wineries Pizzato, Lídio Carraro, Vaccaro, Valmarino and Don Laurindo in average 30 ha of own vineyards and 197,600 l of wines / year. While the others are smaller with an average of 8.5 ha of vineyards and 20,625 l wines per year.The interviews were conducted in May 2015 and had an average duration of 40 minutes.

For the codification of the subjects interviewed, the following standard terminology was used: "O" for Government Agencies, "A" for Associations and "V" representing winery managers, followed by numbering in the order in which interviews were conducted. The interviews were transcribed and analyzed according to the method of content analysis proposed by Bardin (2011). The Tables 1–3 presents this detailed information.

For the analysis of the data, we used the content analysis, which is a set of techniques of analysis of communications, in which the analyst delimits the units of codification or registration and the documentary analysis aims to give shape or represent the content of a document (Bardin, 2011).

Categorization aims to provide a simplified representation of raw data. Among the different possibilities of categorization, the investigation of the themes or thematic analysis consists in discovering the "cores of meaning" that may have meaning for the proposed objective and is fast and effective in the condition of applying to direct and simple discourses. The analyst can carry out a classic content analysis, with a categorical framework, privileging the frequency of the themes with all the interviews together (Bardin, 2011).

Thus, from the transcripts of the interviews, in an inductive way, we proceeded to identify categories of analysis within the topic sectorial brand as an internal resource. The developments within the findings of the interviews in Wines of Brazil and Wines of Brazil, representing the sectorial projects of the Brazilian government agency.

Table 1
Interest Groups - Governmental Agencies. Source: Elaborated by the authors

Governmental agencies	Positions	Form of identification of the interviewees in the results
SEBRAE	Responsible for the Unit for Access to Innovation and Technology	
MAPA	Head of Division / DPDAG / SFA-RJ	
INPI	Director of Trademarks	
	Coord. group of trademarks and certification marks	
	Coord. group of trademarks and certification marks	
IBRAVIN	Business Analyst	O_1
		O_2
	Business Analyst	O_3
EMBRAPA UVA E VINHO	Business Analyst	O_4

Table 2
Interest Group – Associations. Source: Elaborated by the authors

Associations	Positions	Form of identification of the interviewees in the results
APROVALE	Administrative coordinator	A_1
	Consultant	A_2
ASPROVINHO	Administrative coordinator	A_3
APROMONTES	Secretary of the Association	A_4
APROBELO	Member of the Administrative Council of the Association	A_5
AFAVIN	President of the Association	A_6
CPEG	President of the Consortium	A_7
AVIGA	President of the Association	A_8
SINDIVINHORS	President of the Union	A_9
PREFEITURA DE GARIBALDI	Secretary of Tourism and Culture	A_{10}

Table 3
Interest Group – Wineries. Source: Elaborated by the authors

Associations	Wineries	Positions	Form of identification of the interviewees in the results
APROVALE	Don Laurindo	Director and Winemaker	V_1
	Lídio Carraro	Owner partner	V_2
		Tourism and Customer Service	V_3
	Miolo	Brand Manager	V_4
	Peculiare	Owner and Winemaker	V_5
	Pizzato	Owner and Winemaker	V_6
ASPROVINHO	Cooperativa Aurora	Export	V_7
		Marketing	V_8
	Valmarino	Owner and Winemaker	V_9
APROBELO	Faé	Owner and Winemaker	V_{10}
	Fantin	Owner and Winemaker	V_{11}
APROMONTES	Mioranza	Owner	V_{12}
CPEG/AVIGA	Batistello	Owner and Winemaker	V_{13}
	Cooperativa Garibaldi	President of the cooperative	V_{14}
		Tourism	V_{15}
	Milantino	Owner and Winemaker	V_{16}
	Pedrucci	Owner and Winemaker	V_{17}
	Vaccaro	Owner and Sommelier	V_{18}

The triangulation occurred with the interaction of the theory seen in the review of the literature, with the categories of analysis established and the findings of the interviews in the three spheres: government agencies, associations and vitivinicultores.

6. Results

Following is presented the sectorial brand of the wine-making sector "Wines of Brasil", directed to the foreign market, and the sectorial brand "*Vinhos do Brasil*" for the domestic market.

6.1. Wineries and Sectorial Brand

Table 4 presents a complete listing of the wineries that are part of the Wines of Brasil sectorial brand. It is noteworthy that the work developed by IBRAVIN with the support of Apex-Brasil is not restricted to the state of Rio Grande do Sul, since wineries throughout Brazil may have an interest and participate in this sectorial project, with a focus on exports.

In 2016, 27 wineries were involved in the project, mostly located in the state of Rio Grande do Sul. The wineries *Quinta da Neve*, *Sanjo*, *Santa Augusta*, *Suzin* and *Villa Francioni* belong to the state of Santa Catarina and the wineries *Ouro Verde* and *Vinibrasil* are located in the northeast of Brazil.

> "So if we do not have very objective results when we talk about evolution, marketing, wines, with geographical indication, if that is not statistically quantifiable in growth … We have a growth of other elements that make up this, which do not it is only the sales volume, which is important, of course, that this is definitive for the success of the company, but this made the growth very viable, I think it was the seed of this whole process. "(A2)

Thus, even though the Apex-Brasil sectorial project is aimed at the whole country, the concentration of wineries belonging to the wines of Brazil sectorial brand is in the southern region of the country.

Table 4
Complete list of wineries belonging to the sectorial brand.Source: Elaborated by the authors based on Wines of Brasil (2016)

Sectorial brand of the winemaking sector - Wines of Brasil
Almadén
Aurora
Basso
Campestre
Campos de Cima
Casa Valduga
Cave Geisse
Cooperativa Garibaldi
Dom Giovanni
Dom Guerino
Domno
Hermann
Laurentia
Lídio Carraro
Miolo
Mioranza
Ouro Verde
Perini
Peterlongo
Pizzato
Quinta da Neve
Salton
Sanjo
Santa Augusta
Suzin
Villa Francioni
Vinibrasil
Total = 27

6.2. Objective of the creation of the sectorial brand Wines of Brasil

The objective of the creation of the Wines of Brasil sectorial brand was the ordering - support to inspection bodies such as the Ministry of Agriculture - and promotion of the sector (through national and international fairs). For this purpose IBRAVIN was created, which is linked to Apex-Brasil through the promotion project for actions in the foreign market. The entity works with resources of the state government, by an agreement called *Fundo de Desenvolvimento da Vitivinicultura do Rio Grande do Sul* (*Fundovitis*). It also has an agreement with SEBRAE, for promotional actions. IBRAVIN does not work with specific wineries, but with the sector as a whole (O_1).

"Wines of Brasil" is, therefore, a sectorial project with the objective of promoting Brazilian products in the world of wine, in domestic and foreign markets. The project works to participate in international fairs, and the other project *"Vinhos do Brasil"* carries out actions for the domestic market. In relation to international fairs, participation costs are very high and the feasibility of participation in such events is made possible by the existence of the Wines of Brasil project (O_1, A_3). These excerpts represent the opinion of the interviewees:

> "IBRAVIN started operating in 2000. And IBRAVIN brought an industry idea that we did not have before. We had a lot of associations and that lived each one thinking about their association, their navel. IBRAVIN was created to bring together farmers, cooperatives, companies, and then winemakers. "(A2)

> "… it does not help to want to work alone I think the sum is important, for this Wines helped a lot because who had in the beginning, supported and had the courage to face the foreign market dragged along with some who did not have that vision and who did not had this courage … after he went to the first international fair he did not let go any more. "(A2)

In this sense, the work performed by IBRAVIN is described in the literature according to some references (Apex-Brasil, 2014, 2015; Ibravin, 2014; Wines of Brasil, 2016). The sectorial brand project is detailed below.

6.3. Structure of the Sectorial Brand Project

The sectorial brand project for the Brazilian winemaking sector is currently structured under the management of IBRAVIN, with the support of Apex-Brasil. The presence of a government entity is in line with theoretical thinking that shows that governments can establish projects for the construction and maintenance of the country brand and, more specifically, the sectorial brand to promote, protect and oversee its performance (Agrawal & Kamakura, 1999; Barney & Zhang, 2008; Fetscherin, 2010).

IBRAVIN works with funds from *Fundovitis*, paid by the producer to the state of Rio Grande do Sul on the quantity of grapes crushed. Half of the amount collected is sent directly to IBRAVIN and the rest to the state, of which the company can credit ICMS (value added tax). Companies adhering to Wines of Brasil pay a symbolic fee to participate in the project. In relation to *Vinhos do Brasil* the payment is made by participation of each event (O_1, O_2).

In this way, the Wines of Brasil project has existed since 1998 and the wineries associated with the project pay a monthly fee to enjoy the benefits, such as training for the first export. As for the *Vinhos do Brasil* project, which emerged ten years after the initiatives of Wines of Brasil, the winery pays a value for each event that it is interested in participating (O_1).

On the advantages of participating in the Wines of Brasil and *Vinhos do Brasil* projects, were described:

> "…the alliance with Wines of Brasil allowed us to go to countless countries, exhibiting in many fairs and opening many markets, and being alone we would not go, because the investment is very great. In the same way *Vinhos do Brasil* allowed us today to make many events where alone we would not go, because it demands a lot of investment. All in all it was very valid and very important, it allowed many small companies to leverage their exports" (V_4)

> "IBRAVIN is a state institution and is doing a national job. That's why I say it just has to grow and strengthen. The way to participate in fairs, events and such, everything shared is much easier than a business paying alone. And being on this project is very important for sure." (V_7)

In relation to exports, in 2014 the country that most imported Brazilian wines was the United Kingdom, and in previous years the largest importer was China. In 2015, export work focused on three target markets (United Kingdom, Germany and United States). For promotion of the products in these importing countries there is a Brazilian wine ambassador, who works for IBRAVIN, and performs specific actions at the sales points, as well as account and new business development (O_1).

Participation in international fairs includes for 11 consecutive years, ProWein (in 2015 this fair was the largest wine fair in the world, being held in Germany). IBRAVIN sends the proposal of the fair to the members, and the interested parties sign an agreement of acceptance. The producers must send the wine and a representative of the winery to present the product at the Brazilian stand. All necessary infrastructure is provided by IBRAVIN.

Most of the fairs are visited by business owners such as restaurant owners and contracted stores. In other fairs, such as ViniExpo, the target audience are journalists and bloggers. Expovinis - which is the largest in Latin America - receives visitors who are final consumers, although the main focus of the fair is also the entrepreneurs (O_1, O_2,V_4).

Table 5 presents the wineries interviewed, the region to which they belong, and whether or not they participate in the Wines of Brasil and *Vinhos do Brasil* projects. The table also details to which countries the exports are made and which fairs they usually attend.

As can be seen in Table 5, of the 15 wineries surveyed, seven are part of Wines of Brasil/*Vinhos do Brasil* and export, participating in international fairs such as Prowein and ViniExpo. These wineries also participate in ExpoVinis in São Paulo. Of the 8 wineries that do not export, there were the following positions:

> "In fact it is like this: to have an interest I have, but today we have to prepare the company for this, today if we worked with export we would shoot ourselves in the foot. You have to have a whole base so can work with it, so today I am focused on the domestic market and the final consumer, not that I have wines in some stores and restaurants, I have, but my main audience is the final consumer" (V_5)

> "Not yet … we are not exporting … if I export there will be less of the product to serve the national market … and thus for the domestic customer" (V_9)

> "We are still not exporting … first let's do the theme of home … let's do the domestic market … so I have no contact with the staff of Wines of Brasil … they already

Table 5
Wineries and Sectorial Brand. Source: Elaborated by the authors

Winery	Region	Belongs to Wines of Brasil/*Vinhos do Brasil*	Countries to which it exports	Participation in fairs
Don Laurindo	Vale dos Vinhedos	Yes	Canada, Czech Republic, Belgium	ViniExpo Prowein ExpoVinis
Lídio Carraro	Vale dos Vinhedos	Yes	More than 20 countries, the USA being the principle	ViniExpo Prowein ExpoVinis
Miolo	Vale dos Vinhedos	Yes	More than 32 countries	ViniExpo Prowein ExpoVinis
Peculiare	Vale dos Vinhedos	No	Not exported	–
Pizzato	Vale dos Vinhedos	Yes	12 countries, the UK being the principle	ViniExpo Prowein ExpoVinis
Milantino	Vale dos Vinhedos/ Garibaldi	Wines of Brasil no, *Vinhos do Brasil* Yes	Not exported	Expo Vinis in São Paulo
Cooperativa Aurora	Pinto Bandeira	Yes	UK, Belgium, Germany, Japan, USA, France and others	ViniExpo Prowein ExpoVinis
Valmarino	Pinto Bandeira	No	No	–
Mioranza	Flores da Cunha	Yes	South America, USA, Nigeria, Cameroon	Participates in the fairs as a spectator, but does not exhibit products. Working a new line of sparkling wines and these in the future will be at the fairs and exporting with the same purpose as Wines of Brasil.
Faé	Monte Belo do Sul	No	Not exported	–
Fantín	Monte Belo do Sul	No	Not exported	–
Cooperativa Garibaldi	Garibaldi	Yes	Germany, Sweden, USA, Canada and China	ViniExpo Prowein ExpoVinis
Battistello	Garibaldi	No	Not exported	–
Pedrucci	Garibaldi	No	Not exported	–
Vaccaro	Garibaldi	No	No	–

asked us to be part of Wines of Brasil, but I think it's still early … At *Vinhos do Brasil* we are already in … we already participated in ExpoVinis in São Paulo."(V_{16})

It is seen that for those who do not export, there is still work to be done in face of the domestic market and a better structuring to later cover actions aimed at the foreign market. Some producers already dispose of all their production internally and would not have sufficient volume of production to meet the demand of the external market. In addition, small producers are still struggling with knowledge about export mechanisms, price formation, legislation, and sometimes cannot make investments of this nature ($V_{17,}$ O_3). The Wines of Brasil project is explained below.

6.4. *Wines of Brasil project and competitiveness in the external market*

The Wines of Brasil project is seen by the interviewees as a fundamental mechanism for the visibility of Brazilian wine abroad. With the project, it is possible to participate in relevant international fairs, which would be difficult for each individual company due to the need for high investments (V_3,V_{12}). This can be seen in the following excerpts:

"…as a brand, out there without Wines of Brasil we would be nothing, it is Wines of Brasil that shows Brazil has influence out there, it is not the Brazilian wine, so we take advantage of these mechanisms to be able to open the market. In my opinion, because in a country where 80% is imported wine and 20% is national wine, national wine has to embrace and try to grow together" (V_8)

"I speak to you so … abroad if I did not have the Wines of Brasil brand … difficult … in terms of promotion it is Wines of Brasil … hence not as a mark stamped on the label, but as an organism that in a way is a brand … because no winery alone in Brazil for years participated in ProWein … would not have money … but then together can share resources"(V_6)

Brazil is part of the bloc of the so-called New World of wine (Chile, Argentina, United States, Australia, South Africa, New Zealand), which in international fairs have few stands. Other more traditional countries and belonging to the so-called Old World of wine have larger stands that occupy almost the entire space of the exhibition area. One such interviewee reported:

"Wines of Brasil only helps the group because if we are alone we need lots of money to invest or we will not get anything. Brazil is small in the fairs, the other countries are much larger. We are talking about 2000 years of history of Portugal for a hundred years of Brazilian history, and fine wines 20 years of history, so we have gone too far if we think about time" (V_8)

In other countries, there are also export projects similar to Wines of Brasil. There are, for example, Wines of Chile, Wines of Argentina, Wines of Portugal, Wines of Romania. These countries, through these export promotion mechanisms, also participate in international fairs. In the cases of large companies, these have their own and independent stands of the country of origin (O_1).

It is noteworthy that there has been a major change in the global wine market from the 1950s to the present, with a strong increase in competitiveness (Martínez-Carrión & Medina-Albaladejo, 2010). In terms of competitiveness, Brazil has sought strategically to position its wines differently from the competition in Latin America. Competitors such as Chile and Argentina have already positioned themselves in the European market as wines in large quantities at low prices and widely distributed in supermarkets. In this way, the distribution channel used by Brazilian wineries is not the supermarket chains, but the specialized stores such as delicatessens and specialized wine merchants (O_1, O_2, O_3).

In this sense, the wineries seek to create an image that influences the country brand with the wine product. According to Baker and Ballington (2002), Hakala et al. (2013), this creates the possibility for individual companies to benefit in terms of price and access, from the promise given by the country brand.

Moreover, Viot and Passebois-Ducros (2010), Zamparini, Lurati & Illia (2010), Rubini, Motta & Di Tommaso (2013), and Cazurra & Un (2015), show that there is a relationship between product and country of origin, and this relationship communicates quality of products to consumers. In this sense, the interviewees made the following statements about the relation of the wine product with the country of origin, Brazil:

"Our advantage is that when we carry the brand Brazil … we carry Brazil together … and Brazil has a strong brand … everyone would like to be Brazilian in their free time … Brazil is admittedly the smiling country… the brand Brazil is a strong brand despite our several problems … we have this advantage that Brazil is known and admired"(V_6)

"The basic work, which already treats people with more seriousness, who no longer see as that exotic thing that can fade from one hour to another" (O_3)

"…so people will begin to understand and know that Brazil is a wine producer … who sometimes think of Brazil such as the Amazon, Carnival, Rio de Janeiro, but do not have the view that it has a part of the country that has this type of product and in highly awarded products including by magazines, journalists" (V_3)

In this way, competitive advantage comes from the sum of the individual actions of each company plus the joint actions carried out by Wines of Brasil with the companies linked to the territory of origin. The *Vinhos do Brasil* project is described below.

6.5. *Vinhos do Brasil project and competitiveness in the internal market*

The *Vinhos do Brasil* project makes it possible for Brazilian wineries to participate in the ExpoVinis fair - the largest wine fair in Latin America - which takes place in São Paulo:

> "By 2008/2009, only five or six wineries were going to ExpoVinis, from then on this became 30 because IBRAVIN, branded as *Vinhos do Brasil*, has agglomerated 20 to 30 wineries in a single space."(V_6)

In addition, IBRAVIN promotes events such as the Brazilian Tasting Circuit (*Circuito Brasileiro de Degustação*) directed mainly to the public trade that takes place in Brazilian capitals. Directors, managers, and sommeliers are invited through telemarketing. There is also an image project, which is carried out with journalists and ABS (Brazilian Sommelier Association - *Associação Brasileira do Sommelier*) (O_3).

Within the project, there are actions performed specifically for sommeliers. They are invited and visit the producing region, getting to know the wineries and their products with tastings and dinners. It is understood that sommeliers are the communicators of the brand, since they will have direct contact with the final consumer and can indicate Brazilian wines in the specialized wine merchants, delicatessens and restaurants (V_3, V_4, V_5).

There is also a project with national SEBRAE to train the intermediaries in partnership with ABRASEL - Brazilian Bars and Restaurants Association (*Associação Brasileira de Bares e Restaurantes*), present in 18 states, 1000 restaurants and with 13,000 participants (waiter, sommelier or restaurant owner). They have a distance and face-to-face workload and, at the end receive a certificate (O_3).

Additionally, in the domestic market the grape juice (*suco de uva*) is worked in the *Vinhos do Brasil* project, which will lead to the change in the name of the project, which will be *Vinhos do Brasil e Suco de Uva*. Regarding the grape juice market was reported:

> "…It is practically all consumed internally. It is a product that grows alone, sells itself because everyone is looking for healthier foods" (O_3)

With regard to the Brazilian consumer, wine is associated with special occasions such as a romantic dinner, lunch, and commemorative dates. Sparkling wines are also associated with birthdays and holidays, but this is beginning to change, as sparkling wine is already consumed at parties, music bars/clubs, and sushi bars (O_3).

One of the factors pointed out by the interviewees is the low consumption of wines by the domestic market. This is due to lack of tradition and lack of knowledge, as well as because culturally the Brazilian gives preference to the products that are imported and which translate, in the view of many consumers, the idea that something from outside the country is more imposing, and has more quality than internal production. To corroborate this information, the reports of the interviewees follow:

> "When you have access to take a trip abroad, for example, what comes back in the suitcase, perfume, clothes, everything right? So, the difficulty that we feel in the wine market, is also felt in the fashion market, the perfume market also feels, because it is Brazilian culture. "" (O_3, V_5)

> "The biggest competition of ours is … how can I tell you … the Brazilian is not a nationalist … rejection of the Brazilian product … the Brazilian has rejection of the country itself … it is a cultural thing of the Brazilian … Out there you see that the people defend much the product of their own country or the region itself … you go to Italy … you are in Piedmont and it is Piedmont wines that they offer … You go to France, in Burgundy, it's Burgundy wine … they are proud … it's not just the producer, the waiter, the wine drinker … and here we don't do this … here in Brazil today at any event if Brazilian wine is served, the person thinks that it is a non-fashionable party … to be chic we can put any wine from outside that the Brazilian thinks is chic thing … it is a cultural thing … that has to work the head of the Brazilian" (V_1)

> "I see that the Brazilian consumer is migrating from the imported to the national. We can communicate to him that we do it too. The Brazilian has a big problem that he always sees imported as better than national. Anything that is imported is better than the national one." (V_4, $V_{12,}$ A_3)

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This aspect of the Brazilian preference for foreign products was described in the work of Falcão and Révillion (2010), which showed that 62% of wine connoisseurs consulted considered a high relation between GI and wine quality, but for 64% of the sample the foreign GIs are more reliable than the national, which points to the need for actions that promote Brazilian GIs in order to increase the credibility of wineries and the production of national wines.

In conclusion, in the opinion of the interviewees, the *Vinhos do Brasil* project is a promoter agent that searches the contacts and makes it possible to develop all the promotion work (V_3,V_5,V_7). Fig. 1 presents the conceptual map that synthesizes the main ideas of the sectorial brand as an internal resource for the construction of competitiveness of the Brazilian winemaking sector.

Thus, although the processes of development of sectorial brands are still in the implementation phase, being little measured and recent, as presented in the work of Capellaro and Giraldi (2015), one can consider the sectorial brands Wines of Brazil and *Vinhos do Brasil* as an internal resource developed by the Brazilian winemaking sector that brings

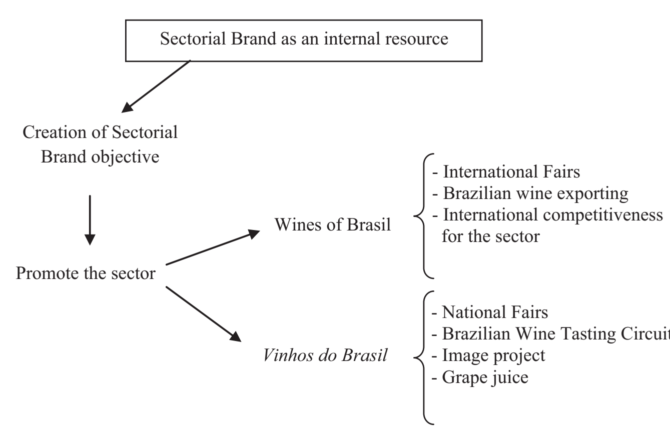

Fig. 1. Sectorial Brand as an internal resource in the winemaking sector. Source: Elaborated by the authors

Table 6
Sectorial Brand as a resource in the winemaking sector.Source: Elaborated by the authors

Brazilian Winemaking Sectorial Brands	Objectives with the creation of the Sectorial Brand	Relation with theory and practice - Main authors
	Planning and promotion of the sector (work of the sector as a whole) Resources of the state government of RS, agreement with SEBRAE and APEX-BRASIL To promote viticulture products in the foreign market (Wines of Brazil) and in the domestic market (*Vinhos do Brasil*) Participation in national and international fairs	Tregear & Gorton (2009), IBRAVIN (2014), Apex-Brasil (2014, 2015), Wines of Brasil (2016)
Current Sectorial Brand Project	Wines of Brasil *Vinhos do Brasil* Made possible participation of the wineries in national and international fairs Overview of wineries that belong to Wines of Brazil and export	Agrawal & Kamakura (1999), Barney and Zhang (2008), Fetscherin (2010)
Wines of Brazil Project - external market	Made possible the export of Brazilian wine Brought competitiveness and promotion to the sector International competition	Baker & Ballington (2002), Viot & Passebois-Ducros (2010), Zamparini et al. (2010), Rubini et al. (2013), Hakala et al. (2013), Cazurra & Un (2015), Capellaro & Giraldi (2015)
Vinhos do Brasil Project - Internal Market	Brazilian Tasting Circuit Image project with journalists and sommeliers ExpoVinis Actions for grape juice National culture in relation to wines	Falcão & Révillion (2010)

improved image and visibility, both in the foreign and domestic market. In the end, Table 6 presents a summary of the sectorial brand as an internal resource in the wine sector and presents the subcategories as Wines of Brazil (project of external market) and Vinhos do Brasil (project of internal market), which are the main projects of the Brazilian sectorial brand with actions for the foreign and domestic markets.

The findings answer the research question as it presents the process of construction of the sectorial brand of the Brazilian wine sector, using Wines of Brazil for export and Vinhos do Brasil for the domestic market.

This sectorial brand is built with the intention of promoting the Brazilian wine sector. For the development of the sectorial brand there are two strategies of operation, Wines of Brazil being directed to the foreign market with the participation in international fairs and promotion of the export of Brazilian wines, increasing the international competitiveness. The other way is with the Vinhos do Brasil brand that promotes the development and participation in national fairs, tastings, training of sommeliers and publicity with projection of image, in order to make the wine better known and consumed by the national consumer.

5. Final Considerations

This article aimed to understand the process of construction and operation of sectorial brands for the Brazilian winemaking sector, considering the perspective of different stakeholders: government agencies, associations and managers of the wineries. It showed how the sector projects along with Apex-Brasil in the sector are being worked on. In the same sense as Rocchi and Gabbai (2013), it sought to show the difficulties and challenges to create competitive advantage in this sector, but through sectorial brands.

The interviewees' reports are in line with the theory that the company consists of a set of resources that cannot be negotiated, imitated or replaced and that these resources produce effective strategies for the market of action (Barney, 1991; Crubellate et al., 2008; Dierickx & Cool, 1989; Grant, 1991; Hart & Dowell, 2011; Peteraf, 1993; Vonkrogh & Roos, 1995; Wernerfelt, 1984). It is also in line with strategic objectives in the wine sector related to governance rule models for the best sectorial development (Charters & Michaux, 2014). Therefore, the results indicate that the use of sectorial brands provides the construction of an internal resource as a source of competitive advantage in the opinion of the government agencies, associations and managers of the wineries.

Loyalty is a particularly important challenge for wine producers from regions considered "New World", such as Brazil. This is because, as discovered by Bruwer and Buller (2013), consumers with a high level of involvement tend to choose wines from regions of the "Old World", such as France and Italy. In this context, the sectorial brand becomes even more important as a source of competitive advantage.

For the foreign market the gains of dissemination and image, with participation of the sector in international fairs, are visualized. So, the gerencial implications can be this participation should be increased and encouraged by IBRAVIN and supported by the associations and wineries in conjunction with effective work to increase exports and commercial relations in the wine world with other countries.

In relation to the domestic market, it is necessary to continue investing in actions and projects carried out by IBRAVIN with the participation of the associations and the commitment of the producers so that the Brazilian consumer knows and consumes the national product. Managerial implications at domestic market like to demystify the concept that wine is an expensive product and can only be used in specific situations, thus boosting the consumption of Brazilian wine every day. These results reinforce the conclusions on opportunities and limitations for manufacturers.

The contributions of this article show that government agencies, associations and wineries understand that sectorial brands are contributing to the development of the sector and that these actions should be continued, validating the conclusions of Patel-Campillo and DeLessio-Parson (2016). Therefore, the joint work of the different stakeholders should seek to improve the production process and improve the quality of the products to be marketed in the internal and external market. Thus, the results corroborate with those presented by Dalmoro (2013) regarding the so-called winemaker's network, demonstrating the importance of networks in these three spheres in order to create competitive advantage.

The findings of this research contribute to the understanding that the practice of sectorial brands can leverage and boost the development of a productive sector, making it more attractive in terms of competitiveness and business development. The case presented contributes to the literature by interacting the theory of shared brands and RBV, since there are still few published works in this sense. In practice, the case brings important information to government, associations and producers that can implement improvements in their actions and continue those that have been seen as possible SCA generators. In addition, it can help in learning from other Brazilian sectors that already have sectorial brands and can learn from the pioneering example of the wine sector in the country.

The work presents the limitation of being a qualitative research, that occurs in a place and determined time, and cannot be generalized to other sectors or countries. In addition, there is the subjectivity of the researcher inherent to this type of study. As a suggestion for future research, one can carry out the study in other sectors that also own brand projects. It is also possible to study, in a comparative way, the Brazilian experiences with those of other countries that also have sectorial brands.

Conflict of interest

None declared.

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