



## Brazilian grape juice exports: an institutional analysis in the Serra Gaúcha Region, RS

 Tatiane Pellin Cislaghi<sup>1a</sup>  Marcela de Toni<sup>2b</sup> and  Elieti Biques Fernandes<sup>3c</sup>

 <sup>1,2</sup> Instituto Federal de Educação, Ciência e Tecnologia do Rio Grande do Sul - IFRS - Campus Bento Gonçalves, Bento Gonçalves, Rio Grande do Sul, Brazil

 <sup>3</sup> Universidade Federal do Rio Grande (FURG), Santo Antônio da Patrulha, Rio Grande do Sul, Brazil

### Abstract

**Objective:** to identify opportunities and constraints in the export process of grape juice by winemaking companies in the Serra Gaúcha region (RS), Brazil. **Methodology/Approach:** the study follows a qualitative approach with an exploratory-descriptive design and utilizes a multiple case study as its research strategy.

**Relevance/Originality:** the study provides empirical contributions to the literature on business internationalization by addressing the export dynamics of organizations within the winemaking context, with a specific focus on grape juice as a product, emphasizing its processes, flows, and certifications.

**Main Findings:** The results emphasize the crucial role of formal institutions in the internationalization process of the organizations studied. Participation in Sectoral Projects, facilitated by affiliation with an entity, stands out as a key factor for achieving a well-structured internationalization.

**Theoretical/Methodological Contributions:** by analyzing the structure and functioning of export processes through the lens of Institutional Theory, the study highlights the importance of formal institutions, such as those supporting the grape and wine supply chain in the Serra Gaúcha region of Brazil, in advancing the promotion and international marketing of grape juice.

**Social/Managerial Contributions:** the research findings are valuable for winemaking enterprises looking to begin their internationalization journeys, as well as for organizations in related industries. The study provides key insights into entering international markets, including a foundational roadmap for internationalization and an overview of existing Sectoral Projects within the grape and wine supply chain.

**Keywords:** business internationalization, institutional theory, food supply chains, winemaking sector

### Authors' notes

Conflict of interest: The authors have not declared any potential conflicts of interest

Corresponding author: Tatiane Pellin Cislaghi - [tatiane.cislaghi@bento.ifrs.edu.br](mailto:tatiane.cislaghi@bento.ifrs.edu.br)

### Cite as / Como citar

American Psychological Association (APA)

Cislaghi, T. P., de Toni, M., & Fernandes, E. B. (2025, Jan./Apr.). Brazilian grape juice exports: an institutional analysis in the Serra Gaúcha Region, RS. *Iberoamerican Journal of Strategic Management (IJSM)*, 24(1), 1-44, e26433. <https://doi.org/10.5585/2025.26433>

(ABNT – NBR 6023/2018)

CISLAGHI, T. P.; De TONI, M.; FERNANDES, E. B. Brazilian grape juice exports: an institutional analysis in the Serra Gaúcha Region, RS. *Iberoamerican Journal of Strategic Management (IJSM)*, v. 24, n. 1, p. 1-44, e26433, Jan./Apr. 2025. <https://doi.org/10.5585/2025.26433>

<sup>a</sup> Ph.D. in Business Administration from the Graduate Program in Business Administration at Unisinos University, Vale do Rio dos Sinos, Porto Alegre.

<sup>b</sup> MBA in Business Administration and Finance from the International University Center (UNINTER), Brazil - [marcela.toni@gmail.com](mailto:marcela.toni@gmail.com)

<sup>c</sup> Ph.D. in Business Administration from the Graduate Program in Business Administration at Unisinos University, Vale do Rio dos Sinos, Porto Alegre, RS - [elieti.fernandes@furg.br](mailto:elieti.fernandes@furg.br)

## Resumo

### Exportações de suco de uva do Brasil: uma análise institucional na Serra Gaúcha/RS

**Objetivo:** identificar oportunidades e restrições do processo de exportação de suco de uva de empreendimentos vitivinícolas da região da Serra Gaúcha (RS), Brasil.

**Método/abordagem:** a pesquisa é de natureza qualitativa e de caráter exploratório-descritivo. A estratégia de pesquisa utilizada é o estudo de caso múltiplo.

**Relevância/originalidade:** o estudo contribui empiricamente para a literatura sobre internacionalização de empresas ao abordar a realidade das exportações de organizações no contexto vitivinícola, com ênfase no produto suco de uva através dos processos, fluxos e certificados que lhe caracterizam.

**Principais resultados:** os achados identificaram a relevância das instituições formais na internacionalização das organizações pesquisadas. A vinculação a alguma entidade, por meio de Projetos Setoriais, é o diferencial para a internacionalização consciente e planejada.

**Contribuições teóricas/metodológicas:** ao analisar a estrutura e o funcionamento dos processos de exportação com a lente teórica da Teoria Institucional, foi possível destacar a importância das instituições formais, como as entidades que atuam na cadeia da uva e do vinho da região da Serra Gaúcha/Brasil, para o incremento da promoção e comercialização internacional do suco de uva.

**Contribuições sociais/para a gestão:** os achados da pesquisa contribuem para outras empresas do ramo vitivinícola que desejam iniciar a sua internacionalização ou até mesmo para organizações de outros setores correlatos, pois o estudo fornece informações importantes a serem consideradas ao ingressar no comércio internacional, como o roteiro básico do processo de internacionalização e alguns dos Projetos Setoriais existentes na cadeia da uva e do vinho.

*Palavras-chave:* internacionalização de empresas, teoria institucional, cadeias de suprimentos de alimentos, setor vitivinícola

## Resumen

### Exportaciones de jugo de uva desde Brasil: un análisis institucional en Serra Gaúcha/RS

**Objetivo:** identificar oportunidades y limitaciones en el proceso de exportación de jugo de uva por empresas vitivinícolas de la región de Serra Gaúcha, RS, Brasil.

**Método/Enfoque:** la investigación es de naturaleza cualitativa, con un diseño exploratorio y descriptivo. La estrategia metodológica utilizada es el estudio de casos múltiples.

**Relevancia/Originalidad:** el estudio aporta una contribución empírica a la literatura sobre la internacionalización de empresas al analizar las exportaciones de organizaciones en el contexto vitivinícola, con un enfoque particular en el jugo de uva, considerando sus procesos, flujos y certificados distintivos.

**Principales resultados:** los hallazgos resaltan la relevancia de las instituciones formales en la internacionalización de las organizaciones investigadas. La vinculación a una entidad, a través de Proyectos Sectoriales, representa un factor diferencial para una internacionalización consciente y planificada.

**Contribuciones teórico/ Metodológicas:** al analizar la estructura y el funcionamiento de los procesos de exportación desde la perspectiva teórica de la Teoría Institucional, se resalta la importancia de las instituciones formales, como las entidades que participan en la cadena de valor de la uva y el vino en la región de la Serra Gaúcha, Brasil, para promover e impulsar la comercialización internacional del jugo de uva.

**Aportes sociales/De gestión:** los resultados de la investigación contribuyen a otras empresas del sector vitivinícola interesadas en iniciar su internacionalización, así como a organizaciones de sectores afines. El estudio proporciona información relevante para el ingreso al comercio internacional, incluyendo una hoja de ruta básica para el proceso de internacionalización y ejemplos de Proyectos Sectoriales existentes en la cadena de valor de la uva y el vino.

*Palabras clave:* internacionalización de empresas, teoría institucional, cadenas de suministro de alimentos, sector vitivinícola

### **Brazilian grape juice exports: an institutional analysis in the Serra Gaúcha Region, RS**

In recent years, Brazil's winemaking sector has significantly expanded its presence in the international market. In 2021, exports of products such as grapes, grape juice, wines, and sparkling wines reached approximately 12 million liters, a notable increase from just over 6.5 million liters in the previous year. Grape juice showed the highest growth rate, with an increase of about 145% in 2022, amounting to approximately 3.3 million liters exported (Uvibra, 2022). In this context, the Serra Gaúcha region in Rio Grande do Sul emerges as Brazil's largest grape producer, contributing around 49.3% of the country's total production.

Data from the Wine Declarations System (Sisdevin), managed by the Secretariat of Agriculture, Livestock, Sustainable Production, and Irrigation (Seapi, 2023), indicate that grape juice production in Rio Grande do Sul increased by 7.8% in 2023 compared to the 2022 harvest, reaching a total of 38,216,760.58 liters. The majority of this production was whole red grape juice, followed by whole white grape juice. Organic products also experienced growth in both juice and wine production (Canal Rural, 2023).

In southern Brazil, internationalized organizations generally adopt low-risk strategies with limited investments to enter international markets. One common approach is direct market presence, typically through direct exports managed by the organizations' own employees, whether or not a dedicated department exists. Another approach involves indirect market presence, facilitated by intermediary companies such as agents or export trading firms. Participation in interorganizational commercial promotion projects targeting international markets is also a widely used strategy (Zen *et al.*, 2013). Examples include *Wines of Brazil* and *100% Grape Juice of Brazil*, which are currently managed by the Brazilian Union of Viticulture (Uvibra) in collaboration with the Brazilian Trade and Investment Promotion Agency (ApexBrasil) (Uvibra, 2023).



The institutional focus on promotion highlights the significance of the winemaking sector to both national and regional economies, providing a strong rationale for numerous studies on winemaking enterprises in southern Brazil. For example, one study examines the efficiency of cooperatives in this sector (Vieira *et al.*, 2023), while another explores how coopetition can create barriers to tourism by prioritizing collective interests that preserve the identity of a Geographical Indication (GI) (Monticelli, Cislighi & Maracajá, 2025).

The findings of Monticelli, Cislighi, and Maracajá (2025) are based on a decade-long qualitative longitudinal study (2012–2022), involving 36 semi-structured interviews with representatives from 16 wineries and 20 formal institutional agents in Vale dos Vinhedos—the first region in Brazil to be officially recognized as a GI. The study revealed that wineries and institutional agents adopted a coopetition strategy to prevent unchecked expansion, particularly in the form of real estate development. This approach effectively blocked the entry of new ventures that could compromise the region's distinctive character.

In the field of international business, Institutional Theory has gained increasing prominence (Ahmadi-Gh *et al.*, 2024; Morrish & Earl, 2021; Pivetta *et al.*, 2021; Monticelli, Garrido, & Dal-Soto, 2016; Rocha & Ávila, 2015), particularly in studies focusing on emerging economies. These contexts offer significant opportunities for research due to their institutional differences compared to developed economies, which have traditionally been the primary focus. In emerging economies, institutional weaknesses amplify the role of institutions in shaping the international competitiveness of firms (Monticelli, Garrido, & De Vasconcellos, 2018).

There is a growing scientific effort to understand the role of institutional agents in the internationalization process, an area that remains underexplored in the literature (Rodrigues, De Vasconcellos, & Nunes, 2022), especially in rapidly developing countries. Future research could focus on mapping both formal and informal agents within the grape and wine industry and analyzing the dynamics among different actors in the supply chain. Since a Supply Chain (SC) is formed through the relationships among its members, these interactions represent a complex phenomenon. Such studies could help assess the connections between actors and how these relationships influence the internationalization process of organizations (Morrish & Earl, 2021).

The role of these agents in complex institutional environments, such as the Food Supply Chains (FSCs) of emerging economies, introduces critical issues that demand further exploration within the field of Sustainable Supply Chain Management (SSCM), where governance structures often face scrutiny (Seuring *et al.*, 2022). SSCM involves managing the flow of materials, information, and capital while fostering collaboration among companies, all guided by the three

pillars of sustainable development—the Triple Bottom Line (TBL) approach, which addresses economic, environmental, and social dimensions (Seuring & Müller, 2008).

As outlined by Seuring and Müller (2008), the integration of sustainability into supply chains is driven by pressures and incentives from various external groups on the demand side. These include customers (the most significant group and the main focus of supply chain management), governments (ranging from local to national and multinational levels), and other stakeholders.

Internationalization within food supply chains, which involve structured processes from the sourcing of food in natural environments to its delivery to consumers, becomes particularly complex in emerging economies. Beyond the need to align supply chain agents and manage the flows and connections across different stages (Tavares, 2022), these processes are shaped by formal and informal constraints imposed by the institutional frameworks of both the country of origin (Hitt, 2016) and the destination country (Petricevic & Teece, 2019).

Institutional Theory (North, 1990; DiMaggio & Powell, 1983) provides a valuable lens for international business studies to examine these dynamics. It enables a focus on how the institutional environment and the role of institutional agents influence the internationalization of firms, particularly in the context of sustainable food supply chain management, as highlighted by Hidalgo et al. (2022).

Building on the context above and focusing on grape juice exports—a product that differs from the more traditionally exported and internationally recognized Brazilian wines and sparkling wines—the research problem can be stated as follows: How do winemaking companies in the Serra Gaúcha region navigate the formal and informal opportunities and constraints of the export process? Accordingly, the objective of this study is to identify the opportunities and challenges faced by winemaking enterprises in the Serra Gaúcha region (RS), Brazil, during the grape juice export process.

This analysis underscored the significance of the environment, institutional agents, and organizations in driving the commercial expansion of winemaking companies in the studied region. It also emphasized the need to monitor production and market trends for grape juice to better align supply with demand, as highlighted by Molle (2021).

This qualitative study uses a multiple case study approach, focusing on six companies in the Serra Gaúcha region of Rio Grande do Sul, Brazil. Its exploratory-descriptive design identified both opportunities and challenges in the grape juice export process within the region. Notably, as global activities resume after the COVID-19 pandemic, renewed planning and initiatives are anticipated to enhance the promotion and commercialization of the product. One





suggested strategy is the revival of Sectoral Projects led by formal institutions such as Uvibra, in collaboration with the Brazilian Trade and Investment Promotion Agency (ApexBrasil), which play a pivotal role in supporting companies in this region to expand into international markets.

### **Theoretical Framework**

The study will first provide an overview of the internationalization of businesses and institutional agents. It will then explore the internationalization of winemaking companies, with a specific focus on grape juice exports. Lastly, it will examine business arrangements, particularly within the context of the food supply chain.

#### **Internationalization of Businesses and Institutional Agents**

Business internationalization refers to the processes of exporting and/or importing products and services, allowing companies to expand their operations into international markets and increase their engagement in global activities (Alaby, 2021). Expanding economic activities across national borders requires meeting specific requirements, such as documentation, certifications, customs procedures, foreign exchange, and international logistics. This process also brings varying levels of complexity depending on the markets and the products or services involved.

The international business literature generally agrees on two main approaches to business internationalization: the economic approach, which frames internationalization as a rational decision to expand operations, and the behavioral approach, which views it as a gradual process (Carneiro & Dib, 2007). Studies on the behavioral approach are grounded in the Nordic School's Uppsala Model, which describes internationalization as a sequential process that combines accumulated experience and knowledge of foreign markets (Johanson & Vahlne, 1977).

Studies following the economic approach, based on Transaction Cost Theory (Williamson, 1975), Internalization Theory, and the Eclectic Paradigm of Production (Dunning, 1988), explain how firms organize their activities using market mechanisms or hierarchical structures. These approaches focus on achieving advantages related to location, ownership, and internalization, while aiming to maximize economic gains. More recent research, however, has introduced new perspectives, such as Institutional Theory (Williams & Spielmann, 2019).

Institutional Theory emphasizes the need to contextualize a firm's internationalization process based on its relationships of autonomy and dependency within the cultural and institutional values of the environments in which it operates (North, 1990). In this context,

institutions act as formal structures that can guide or limit the decisions of participating entities, influencing international integration in positive, negative, or neutral ways. Formal institutions play a critical role in either facilitating or hindering a firm's internationalization efforts. Examples include organizations with formal legal structures, from both the public and private sectors, such as government agencies, industry associations, support organizations, tax authorities, state banks, and trade administration bodies (Monticelli *et al.*, 2018).

Institutional Theory places the relationship between organizations and their environment at its core (Duarte & Tavares, 2012; Williams & Spielmann, 2019). The environment is understood not only as a collection of resources, such as people, materials, and economic factors, but also as including symbolic elements, such as myths, belief systems, and professional practices. This theory has deepened the understanding of organizational phenomena, particularly in explaining how organizations respond to environmental pressures. These pressures, often originating from government actions, can drive companies toward increased homogeneity (Duarte & Tavares, 2012, p. 1).

Institutional Theory also highlights how organizations adapt to socially accepted norms (Caldas, Fachin, & Fischer, 2007). According to Dias Filho (2003, p. 95), Institutional Theory aims to “explain the structure and functioning of organizations as socially constructed entities. From this perspective, organizations are dynamic actors operating within the rules, procedures, beliefs, and values that dominate a given context.”

DiMaggio and Powell (1983) define institutionalization as the process through which organizational fields become structured. They explain that once a field is established, forces of isomorphism and the solidification of structures begin to take shape. These isomorphic mechanisms are tied to the environment, which sets the standards for legitimacy.

Scott (2001) argues that social forces play a key role in shaping organizational fields, which develop their own institutional logics and governance systems. These, in turn, influence the structure and activities of individual organizations. From this perspective, it becomes clear that institutional change involves not only processes of isomorphism but also the creation of new institutions and the transmission and diffusion of existing ones.

To broaden the concept of the organizational field, Scott and Meyer (1999) introduced the idea of the social sector, and later, Scott (1999) proposed the concept of the functional field. According to these authors, the organizational field model typically focuses on horizontal connections among organizations and the relationships between organizations within a specific geographic region.

Scott and Meyer (1999) and Scott (1999) clarify the concepts of social sector and functional field by distinguishing them from organizational set and population. According to the authors, the organizational set model focuses on a single organization's perspective. This approach shifts attention away from the broader system of relationships in which organizations operate, concentrating instead on the specific organization. In contrast, the population model is useful for studying competitive relationships among similar organizations but often neglects or overlooks the supportive relationships between similar and different types of organizations.

The work of these authors expands the possibilities of the institutionalist theoretical framework but leaves the role of social forces in shaping organizational fields, social sectors, or functional fields underexplored. These social forces are diverse, multifaceted, and often implicit. They can be partially understood by (i) identifying the role of institutional agents involved in the supply chain and grape juice export process, and (ii) analyzing the main strategies, motivations, and investments companies use to enter new markets and strengthen their presence in existing ones.

Given this context, empirical research was conducted to explore the internationalization process of Brazil's winemaking sector, with a specific focus on grape juice exports.

### **Internationalization of Winemaking Companies and the Export of Grape Juice**

Several studies examine the Brazilian winemaking sector's participation in the international market, particularly its internationalization strategies. For example, Monticelli, Garrido, and De Vasconcellos (2018) explored the role of institutions in promoting cooperation as a strategy to guide the internationalization of Brazilian winemaking industries. Their findings showed that formal institutions play a crucial role in fostering cooperation within the sector. This collaborative approach helps companies access new resources and capabilities, facilitating internationalization while also boosting their competitiveness in the domestic market. However, the study also highlighted certain limitations in these relationships, primarily due to the diverse nature of the companies involved and differences in how they perceive the benefits gained.

Another noteworthy study is the one by Ramalho, Sousa, and Araújo (2021), which examines the structures and strategies of winemaking companies in Rio Grande do Sul and the emerging hub of Vale do São Francisco. The study identifies several common challenges faced by these companies, including limited internationalization, conservative strategic goals, relatively small company sizes, high levels of organizational informality, and basic information and communication technologies focused mainly on accounting and financial tasks.



Another key strategy used by Brazilian wineries is participation in sectoral projects. Dalmoro (2012) examined the characteristics of wine producer networks and their impact on the internationalization of the wine industry. Case studies focused on two emerging wine-exporting countries: Brazil, through the *Wines of Brazil* sectoral project, and Uruguay, with *Wines of Uruguay*. These networks aim to promote wineries from these countries in international markets and establish a shared organizational structure for all members.

Collaboration among local wine industry stakeholders has been crucial for addressing specific challenges: overcoming domestic market limitations in Uruguay and competing with imported wines in Brazil. The findings showed that forming networks allows companies to access resources that would be difficult to obtain independently, particularly in building a cohesive national wine image.

Several studies also focus on wine and sparkling wine exports, examining the industry's production potential and the effects of the COVID-19 pandemic on exports (Farias, 2021). Other research highlights technical protectionist barriers that hinder Brazilian wine exports (Ioppi, Vieira & Gonçalves, 2020).

While numerous studies examine the internationalization of winemaking companies in Brazil, particularly in the Serra Gaúcha region, research on Brazilian grape juice exports remains limited (Zimieski & Cislighi, 2024; Molle, 2021). This gap is especially evident in studies addressing the decision to enter international markets and the challenges involved. These challenges include the novelty of the endeavor, which demands efforts to acquire knowledge for successful operations abroad, strategies to build legitimacy, and the ability to navigate varying institutional environments based on the chosen entry mode (Cislighi, Fernandes & Wegner, 2017).

For direct market presence, a company must allocate resources to establish a sales or production subsidiary, a representative office, or internal staff (often supported by a structured export department). It can also pursue strategies like cooperations and alliances, export promotion consortia, technology transfers, partnerships with local entities, franchising networks, or joint ventures.

For indirect presence, the company may work with agents, distributors, or trading companies (Minervini, 2008). In essence, indirect export relies on intermediaries to connect the company with international customers, while direct export involves direct interaction between the company and its customers. Typically, direct export reflects a proactive approach, where the company actively seeks to develop new markets for its products.

In the context studied, challenges persist in turning domestic wineries into internationally competitive companies. These challenges include macroeconomic factors, such as shifts in macroeconomic policies and exchange rate fluctuations, climate change impacts, and governance issues. The governance challenges arise from the sector's structure, which consists of many small businesses and numerous institutions representing its stakeholders (Monticelli *et al.*, 2016).

### **Business Arrangements: Food Supply Chain**

The removal of borders and the increase of alliances and partnerships have given rise to business arrangements that reshape the competitive landscape. Competition has shifted from company-versus-company (micro-competition) to group-versus-group (meso-competition). These arrangements are described in the literature using terms such as networks, clusters, supply chains, cooperatives, and constellations, among others. Their primary purpose is to connect companies within broad systems of productive, technical, and commercial relationships, which can range from formal to informal (Silva, 2007, p. 15).

These arrangements differ in competitiveness, scope, power dynamics, bottlenecks, strategies, sectoral policies, and other unique features. This research specifically focuses on food supply chains, also referred to as agri-food supply chains.

These supply chains involve the production and delivery of agricultural products from their origin to the point of consumption, passing through stages designed to add value to the final product (see example in Appendix A) (Yadav *et al.*, 2022). Within the grape and wine supply chain, several national and regional institutions play a significant role in the context of the Serra Gaúcha region, as shown in Table 1.

UVIBRA stands out for its current role in promoting grape- and wine-based products in the international market, in partnership with ApexBrasil. Following the closure of the Brazilian Wine Institute (Ibravin) in 2020, UVIBRA has taken over responsibility for these initiatives. Notably, in 2021, a technical and financial cooperation agreement (No. 46-02/2021) was signed between the Planning and Management Council for the Application of Financial Resources for the Development of Viticulture in Rio Grande do Sul (UVIBRA-Consevitis-RS) and ApexBrasil (Monticelli *et al.*, 2016; Vinho Brasileiro, 2021; ApexBrasil, 2022).

In this context, UVIBRA aims to support organizations that are either entering or already operating in international markets. Its initiatives include participation in trade fairs, promotional events, trade missions, and other specialized activities to promote commercial opportunities

(Vinho Brasileiro, 2021). Table 1 lists some of the key entities directly involved in Brazil's grape and wine supply chain.

**Table 1**

*Entities in the Brazilian Winemaking Supply Chain*

Entities	Description	General Objective
Ministry of Agriculture, Livestock, and Supply (MAPA)	Federal governmental body that regulates the production and commercialization of food (Brazil, 2023).	“To promote the sustainable development of agricultural supply chains for the benefit of Brazilian society. It is responsible for managing public policies that stimulate agriculture, fostering agribusiness, and regulating and standardizing services related to the sector” (Brazil, 2023; 2024).
Brazilian Trade and Investment Promotion Agency (ApexBrasil)	National governmental agency that promotes Brazilian products and services abroad and attracts foreign investments (ApexBrasil, 2022).	“To promote exports, the internationalization of Brazilian companies, and foreign direct investment, in support of national public policies and strategies, to contribute to the sustainable growth of the Brazilian economy” (ApexBrasil, 2022).
Brazilian Union of Viticulture (UVIBRA)	National and international civil association, founded on September 28, 1967 (UVIBRA, 2022).	“Its social purpose is the growth, efficiency, and competitiveness of the sector it represents, seeking to defend, regulate, and harmonize the institutional framework for the production, commercialization, and promotion of the Brazilian productive chain across the national territory and abroad. It is composed of companies producing wines, sparkling wines, whole or concentrated grape juices, wine-based spirits, and other products derived from grapes and wine in Brazil, as well as their regional and/or state associations” (UVIBRA, 2022).
Brazilian Association of Oenology (ABE)	National civil association with international recognition, founded on October 22, 1976 (ABE, 2022).	“Its objective is to promote winemaking culture and establish a harmonious relationship between oenologists and consumers” [...]. “The entity develops initiatives aimed at improving the skills of professionals in the fields of oenology and viticulture” (ABE, 2022).
Union of the Wine, Grape Must, Vinegar, and Grape-Derived Beverage Industry of the State of Rio Grande do Sul (SINDIVINHO RS)	Employer union entity, founded in 1948. Currently, it legally represents the interests of over 400 wineries in Rio Grande do Sul (SINDIVINHO RS, 2022).	“Its purpose is [...] to study, coordinate, protect, and legally represent the economic category of wine and derivative industries” (SINDIVINHO RS, 2022).
Gaúcha Association of Winemakers (AGAVI)	Regional civil association, founded on August 19, 1981, in Flores da Cunha. It plays a prominent role in addressing issues related to foreign trade, such as the Federal Wine Law in 1998 and Mercosur wine	“Its goal is to bring together and create favorable conditions for production and competitiveness for wine producers in Rio Grande do Sul, whether small, medium, or large” (AGAVI, 2022).



Entities	Description	General Objective
	regulations (AGAVI, 2022).	
Federation of Wine Cooperatives of Rio Grande do Sul (FECOVINHO)	Representative entity of Family Agriculture in Serra Gaúcha (more than 4,000 families associated with six wine cooperatives) (FECOVINHO, 2022).	“Its objective is to defend and project the future of cooperative winemaking and help organize the grape and wine production chain in Brazil” (FECOVINHO, 2022).
Brazilian Association of Pure Grape Juice Producers	National civil association, founded on January 11, 2018, by 12 companies/wineries (Brazilian Association of Pure Grape Juice Producers, 2022).	“Its aim is to enhance the value of pure grape juice. A process that requires more technology, rigorous controls, and laboratory analyses to ensure that consumers are consuming only pure grape essence. [...] The mission of the Association and its members is to ensure that consumers, when purchasing a product with the pure juice guarantee seal, are bringing home and to their families ‘only grapes’” (Brazilian Association of Pure Grape Juice Producers, 2022).

Source: Prepared by the authors based on data available on the entities' websites (2022-2024).

In addition to the institutions listed in Table 1, several other organizations play important roles, such as the Association of Fine Wine Producers of Vale dos Vinhedos (APROVALE), the Association of Winemakers of Monte Belo do Sul (APROBELO), the Association of Producers of Altos Montes (APROMONTES), and the Association of Wine Producers of Pinto Bandeira (ASPROVINHO), among others.

On the international stage, the International Organisation of Vine and Wine (OIV) serves as a key scientific and technical authority in the grape and wine sector. This intergovernmental organization is recognized for its expertise in areas such as grapes, wine, wine-based beverages, table grapes, raisins, and other derived products (OIV, 2022). The research method is outlined below.

### Method

This research follows a qualitative approach with an exploratory-descriptive design, using a multiple case study strategy (Yin, 2010). The unit of analysis focuses on the export activities of the studied companies. For case selection, the primary criteria were the prominence of the companies in grape juice exports, along with recommendations from experts.

The research aimed to explore new developments in the empirical field while offering theoretical, managerial, and organizational insights. It also sought to contribute to the refinement of Institutional Theory, highlighting that "formal institutions play a fundamental

role in the evolution and consolidation of the wine industry in Brazil. Institutionally, the Brazilian winemaking industry, particularly the fine wine sector, has experienced significant changes in recent years." The growth of the winemaking sector has been driven by technological innovations, increased bargaining power among retailers, and rising competition at both national and international levels (Monticelli *et al.*, 2016, p. 358).

The chosen method is justified by its capacity to allow direct field observation and its suitability for exploring new areas. However, a key challenge of this approach is ensuring the external validity of the findings for other contexts. To address this, the case study in this research includes a variety of company types—small, medium, and large enterprises, cooperatives, and industries—providing a broader perspective.

This research followed the steps outlined by Eisenhardt (1989) for conducting multiple case studies: (i) initial steps, including defining objectives, the research problem, and potential constructs; (ii) case selection, determining the field of analysis and the number of cases; (iii) creation of data collection instruments; (iv) entry into the field; (v) data analysis; (vi) development of assumptions; (vii) linking collected data to the literature by comparing findings to existing studies, identifying similarities or conflicts; and (viii) final steps, including drafting the final report and drawing conclusions.

### Data Collection Technique

To ensure data triangulation—using multiple sources of evidence to enhance the study's validity (Flick, 2012)—data collection included: (i) document analysis, (ii) on-site observations of the studied organizations (when valid), and (iii) in-depth semi-structured interviews conducted either in person or online (Table 2). The triangulation process allowed the results to address different aspects of the research question, providing a more comprehensive understanding of the problem. For instance, the analysis revealed convergence between formal documents defining relationships between institutions and organizations, observations of joint initiatives carried out by these entities, and interview accounts emphasizing the importance of institutional involvement in promoting actions in international markets.

Contact with the companies started in April 2022 and included several informal discussions to explain the research objectives, conduct related studies (mainly with industry specialists), and secure permission for final data collection. While no formal documentation was required from participants to use the collected data, the decision was made to keep the companies' identities confidential by using fictitious names.



The primary documents analyzed included promotional materials used by the companies in international negotiations. Additionally, secondary data were gathered from participants' websites, government websites, and public and private sector institutions, among other sources. This information helped contextualize the grape juice export sector.

The observation framework focused on aspects such as information exchange, signs of conflict or dissatisfaction with sectoral institutions, trust, commitment, cooperation among companies in the sector, and other dynamics observed during the interviews. For the interviews, participants were key informants at strategic and tactical levels. A case study protocol (Appendix A) and a question guide (Appendix B) were used. The guide included 21 open-ended questions divided into three sections aligned with the research objectives: (i) identifying the role of participating agents in the supply chain, including contextual and institutional factors; (ii) describing the main strategies, motivations, and investments made by companies to enter new markets and strengthen their presence in existing ones for grape juice exports, and (iii) identifying the opportunities and challenges faced during the grape juice export process.

The question guide was validated in April 2022 by three experts: a Ph.D. in Marketing, a Ph.D. in Business Administration, and the Executive Director of a well-known company in Rio Grande do Sul with over 15 years of experience in marketing and international trade of wine, grape juice, and sparkling wines. The validation ensured the content and questions were clear, with minor adjustments made based on their feedback. Details about the interviews and participants are provided in Table 2.



**Table 2**

*Coding of Participating Companies and Interviewees*

Company Code	Description	Interview Code	Position	Date and Duration of the Interview	Location of the Interview
Juice Industry 1	EcoFactory, founded in 1996, sources its raw materials from family farming. It produces organic products such as juices (grape, apple, etc.), red wine and balsamic vinegars, grape peel and grape seed flours, and grape seed oils.	E1	Administrative/ Commercial Manager	04/22/2022 33min	Company Headquarters – Garibaldi, RS
Winemaking Cooperative 1	Founded on February 14, 1931, it is currently composed of 1,100 associated families, making it the largest winemaking cooperative in Brazil. It exports to several countries, with China being the main destination for its carbonated grape juice.	E2	Export Supervisor	04/26/2022 02h	Company Headquarters – Bento Gonçalves, RS
Winemaking Cooperative 2	Founded in 1931, it currently includes around 900 producer families. It produces whole grape juices, organic juices, nectar juices in various flavors, carbonated juice, and reconstituted juice, as well as wines and sparkling wines. It primarily exports organic grape juice to Libya.	E3	Commercial Director	04/28/2022 30min	<i>Online – Google Meet – Flores da Cunha, RS</i>
Juice Industry 2	Founded in 2015 by a family of farmers who have lived in the Serra Gaúcha region for five generations. It currently collaborates with 250 producer families. Its product line is highly diversified, including whole juices, mixed juices, and teas. It primarily exports white whole juice to Portugal and mixed juices to China.	E4	Southern Region Commercial Manager	04/29/2022 43min	<i>Online – Google Meet – Caxias do Sul, RS</i>
Winemaking Industry 1	Founded in 1989, it began producing and bottling its own wine under its own brand in 1994 and entered the international market in 2003. Its product line is highly diversified, including wines, juices, sparkling wines, and spirits. It primarily exports wines.	E5	Export Analyst	05/03/2022 36min	Company Headquarters – Vale dos Vinhedos, RS

Company Code	Description	Interview Code	Position	Date and Duration of the Interview	Location of the Interview
Winemaking Cooperative 3	An agroecological cooperative founded in 1931 by 73 producers. Its product line includes sparkling wines, wines, and organic and biodynamic juices. It has international recognition, with its sparkling wines being the most awarded in Brazil and the most exported product.	E6	Export Assistant	05/10/2022 48min	Company Headquarters – Garibaldi, RS

Source: prepared by the authors (2022).

### Data analysis techniques

Following the case study protocol (Appendix A), the data analysis used multiple sources of evidence to develop convergent lines of inquiry. This approach increases the accuracy and reliability of findings, as conclusions are more convincing when supported by diverse information sources (Yin, 2010). The analysis applied a content analysis method, which was organized into three key phases: (i) pre-analysis, (ii) material exploration, and (iii) result processing, inference, and interpretation (Bardin, 2010).

The pre-analysis phase involved developing theoretical propositions aligned with the study's objectives. These propositions served as the foundation for creating the case study protocol and the question guide. During the material exploration phase, several case study analysis techniques outlined by Yin (2010) were used. These included creating a category matrix, organizing evidence within these categories, classifying data into tables using text documents for initial coding and refinement, and utilizing graphic schemes to visualize the data.

In the final phase—treatment of results, inference, and interpretation—the findings were supported by researcher-prepared reports, expert validations (through discussions in meetings and email exchanges), and participant verification (via informal conversations with some interviewees).

Each interview was conducted in person at the headquarters of the participating companies, recorded, and later transcribed into a text document (totaling 24 pages). The transcription was adapted (*not verbatim*), with minor language habits that did not affect the content omitted. The interviews were analyzed in two ways: individually and across cases (Eisenhardt, 1989). Differences and similarities among the companies were identified and carefully maintained throughout the analysis.

To ensure the validity of data collection and the reliability of evidence in the case studies, the research followed principles and criteria outlined by Yin (2010): (i) triangulation, (ii) a case study database, (iii) evidence chaining, (iv) construct validity, (v) internal validity, and (vi) external validity. External validity focuses on defining the scope to which the study's findings can be generalized through replication logic (both literal and theoretical). In this research, the goal is analytical generalization, meaning the findings from the multiple case studies can be applied to situations beyond the original cases, given the importance of the topic and the relevance of the research sector (Yin, 2010).

### **Data Analysis and Discussion of Results**

To provide a clearer understanding of the results, the analysis begins by contextualizing the study's focus. It is then organized around two specific objectives: identifying the role of supply chain participants and examining the main strategies, motivations, and investments companies use to enter new markets and strengthen their position in existing ones for grape juice. Finally, the analysis addresses the opportunities and challenges faced in the grape juice export process.

### **Characterization of the Study Object**

Rio Grande do Sul is home to Brazil's largest vineyard cultivation area, producing 90% of the country's grapes, wine, and other grape-derived products. The Serra Gaúcha region leads in production, contributing about 85% of the state's total grape output. Other significant regions include Campanha Gaúcha, Serra do Sudeste, Campos de Cima da Serra, and Vale Central. In the Serra Gaúcha, approximately one-third of grape growers are part of cooperatives, a defining characteristic of the sector. Some cooperatives exclusively accept grapes from their members (Conab, 2019).

Grape juice is recognized as a unique beverage due to its energy, nutritional, and therapeutic properties. It is described as "a drink that is both sweet and acidic, with low levels of lipids, proteins, and sodium chloride" (Rizzon & Meneguzzo, 2007, p. 9). It also possesses specific characteristics: "high amounts of sugars, organic acids, and mineral salts, along with vitamins, and is easily digestible, with all components readily absorbed by the human body" (Rizzon & Meneguzzo, 2007, p. 9).

Several studies have shown that "red or white grape juice offers similar health benefits to wine because it contains antioxidants known as polyphenols." These polyphenols "help



prevent the oxidation of bad cholesterol, Low-Density Lipoprotein (LDL), which contributes to the formation of plaques in artery walls" (Dani, 2022).

Appendix C provides an overview of the types of grape juice produced by the juice industries, winemaking cooperatives, and wineries interviewed for this study. The nutritional value of grape juice, along with the convenience of its ready-to-drink format, has contributed to the growth of the global fruit juice market. This expansion is fueled by rising demand for healthy beverages among increasingly health-conscious consumers.

The growth of this market is reflected in the increase in Brazilian exports between 2018 and 2023, as shown in Table 3, compiled using data from the Comexstat website (2024). The analysis does not focus on a specific destination country, but key markets include Japan, the United States, China, and Paraguay. The classifications used follow the Mercosur Common Nomenclature (NCM): 2009.60.00: Grape juices (including grape musts), unfermented; 2009.61.00: Grape juice (including grape musts) with a Brix value not exceeding 30, and 2009.69.00: Other grape juices.

**Table 3**

*Grape juice exports (2018-2023)*

Ano	FOB value
2023	USD 63,766.61
2022	USD 47,717.13
2021	USD 20,820.90
2020	USD 11,277.20
2019	USD 32,777.89
2018	USD 23,778.03

Source: prepared by the authors based on ComexStat data (2024).

Along with the market expansion, there is a growing complexity in the roles of the agents involved in the grape juice supply chain, as will be explored in the next section.

**Identification of the Role of Participating Agents in the Supply Chain**

Table 4 provides a summary of each organization's internationalization history, including the main products they export, their destination countries, and the institutional agents they collaborate with or are connected to



**Table 4 - Internationalization History of the Surveyed Companies and Institutional Agents**

Companies	Summary of Internationalization History	Exported Products	Type of Exported Grape Juice	Main Markets and Type of Grape Juice	Entities/Projects the Company Participates in/Relationships (Institutional Agents)
Juice Industry 1	The company began its internationalization more effectively through the owner's sister, who resides in the United States (2015–2016). They had previously attempted to start exporting for several years but achieved little success; it was only through this family contact that it became possible.	Grape juice, apple juice, tangerine juice, orange juice. Grape and apple vinegars, grape seed flour, and grape seed oils.	Organic Grape Juice	USA – Organic Grape Juice	Association in the Project Organics Brasil – ApexBrasil
Winemaking Cooperative 1	The company has been exporting since 1960. It started with sales in Japan and now serves several countries. When the <i>Wines of Brazil</i> Project began, they hired an employee to invest in the export sector.	Juices – whole white and red, organic juice, carbonated juice, wines, sparkling wines.	Organic Grape Juice Juice – the most exported products are carbonated white (export-only) and carbonated red juices Whole Grape Juice Organic Juice in small quantities	China – Carbonated Grape Juice Paraguay Russia; USA; Canada; Japan; Colombia	FECOVINHO UVIBRA Sectoral Project Wines of Brazil and 100% Grape Juice of Brazil Program – ApexBrasil
Winemaking Cooperative 2	Internationalization emerged from the need to diversify the company's business, as they felt "threatened" by the influx of products from other countries. They entered the international market in 2012.	Grape juice – organic, whole, reconstituted, carbonated, table wine, fine wine, and sparkling wines.	Organic Juice	Libya – Organic Grape Juice	Sectoral Project Wines of Brazil and 100% Grape Juice of Brazil Program – ApexBrasil
Juice Industry 2	The company is family-owned and used to deliver its production to another cooperative. In 2005, they began purchasing juice production machinery. In 2015, they started selling independently and separated from the other cooperative. They entered the international market through contacts with companies and export agents interested in taking their products abroad, and through these contacts, they began exporting in 2018.	Juices – whole white, whole red, whole rosé, mixed juices (various flavors such as grape and blueberry, grape and açaí, grape and blackberry), and teas.	Whole Red Juice	Portugal – Whole White Grape Juice China; Costa Rica; United Arab Emirates	Participants in the 100% Grape Juice of Brazil Program – ApexBrasil
Winemaking Industry 1	The winery began its operations in the wine industry in 1989. It started exporting to the United States in 2003 and later expanded to other countries. It now exports to over 20 countries and has a well-structured export sector with qualified professionals and significant expertise.	Sparkling wines, whole juices (white, red, rosé), fine wines.	Whole Red, White, and Rosé Juices	China – Whole Red Grape Juice United Kingdom; Paraguay	APROVALE UVIBRA Sectoral Project Wines of Brazil and 100% Grape Juice of Brazil Program – ApexBrasil
Winemaking Cooperative 3	The cooperative has been in operation for 91 years but has only been exporting for three years—just beginning its formal internationalization process. While it has an export department, it relies on a sales agent.	Sparkling wines, whole red juice, biodynamic juice.	Whole Red and Biodynamic Juices	USA – Whole Red Grape Juice London; Canada; Colombia	Sectoral Project Wines of Brazil and 100% Grape Juice of Brazil Program – ApexBrasil

Source: prepared by the authors based on interviews and documents (2022).



According to interviewees E1, E4, and E6, the internationalization process of their organizations (Juice Industry 1, Juice Industry 2, and Winemaking Cooperative 3, respectively) aligns with the principles of the Behavioral Approach. This approach emphasizes that decision-making is strongly influenced by attitudes, perceptions, and behaviors, with a focus on reducing risks when deciding how and where to expand (Johanson & Vahlne, 1977; Carneiro & Dib, 2007; De Souza & Fenili, 2012; Da Silva Alchieri, Dalbosco, & Do Nascimento, 2017).

E6's comment illustrates this perspective: *"The Cooperative has been operating for 91 years, but we have only been involved in exports for three years. It's still very new, nothing particularly significant."* According to this approach, internationalization occurs gradually, following a step-by-step process that combines experience and market knowledge before expanding further (Johanson & Vahlne, 1977).

E2 from Winemaking Cooperative 1 explained, *"We've been selling abroad since 1960—just a box here, a box there, to Japan. There were always sales abroad. When Ibravin was created, the Wines of Brazil Project was launched, and that's when we hired someone to handle exports and joined the wine export market."* This statement reflects elements of the Economic Approach. Similar observations were made with Winemaking Cooperative 2 (*"Internationalization emerged from the need to diversify the business; exporting is a diversification of the company's activities"* – E3) and Winemaking Industry 1.

The internationalization processes of these companies align with economic theories, which prioritize planned and rational decisions based on economic criteria. These companies structure their activities using market mechanisms or hierarchical frameworks, seeking advantages in location, ownership, and internalization while aiming to maximize economic gains (Williamson, 1975; Dunning, 1988).

A key observation is that Institutional Theory is highly relevant to all six organizations studied. As noted by Monticelli, Garrido, and Dal-Soto (2016), Brazilian wineries often rely on strategies involving intermediaries, such as entities operating through institutional projects. In this study, institutional initiatives like *Wines of Brazil* and *100% Grape Juice of Brazil* (Suco de Uva 100% do Brasil), both developed in partnership with ApexBrasil, have played a central role in facilitating entry into and consolidation in international markets. These companies actively participate in trade fairs, trade missions, business matchmaking events, and other activities organized by Uvibra and ApexBrasil (formerly Ibravin-Apex).

Winemaking Cooperative 1 actively participates in events organized by the project. According to E2, *"The last in-person fair we attended was in Colombia; the one in China was postponed due to COVID. During the pandemic, we also participated in several online fairs"*





*and business matchmaking events.*” Similarly, E5 from Winemaking Industry 1 shared, *“Every year, we have a fair in Germany scheduled for March. We showcase our wines, and alongside them, the juice, offering a bundled package. During the pandemic, we also took part in online fairs and business matchmaking events.”* Winemaking Cooperative 3 is also involved in fairs. E6 noted, *“We’ve only recently started exporting... we participated in a fair in Germany and through Apex.”*

In recent years, significant changes have taken place in the organization of the project. Currently, Consevitis-RS, headquartered in Bento Gonçalves, RS, ensures equal representation from key stakeholders: grape producers, represented by the Rural Workers’ Unions and the Interstate Grape Commission (CIU); the winemaking industry, represented by the Brazilian Union of Viticulture (Uvibra) and the Gaúcha Association of Winemakers (Agavi); and wine cooperatives, represented by the Federation of Wine Cooperatives of Rio Grande do Sul (Fecovinho).

“Consevitis-RS focuses on fostering cooperation within the grape and wine production chain and implementing the sectoral policies proposed to Fundovitis. Since December 2020, the council has managed resources across three key areas: promotion, management, and sectoral organization” (Wines of Brazil, 2022).

In this context, several key aspects emerge. Juice Industry 1 (E1) and Juice Industry 2 (E4), which have broader grape juice export operations, report challenges in participating in events due to the lack of fairs specifically dedicated to this product. Most fairs are focused on wine, with limited inclusion of other grape-derived products.

E4 explains, *“The grape juice that sells the most in exports is mixed with açaí because açaí is perceived as more distinctly Brazilian. We participate in a fair in Canada, but only occasionally, just to spark customer interest. The company’s main priority is the domestic market.”*

Similarly, E1 notes, *“There is a lack of recognition for grape juice as a product. It’s not like Wines of Brazil, where there was a significant effort to promote it. For juice, that hasn’t happened. Currently, we don’t participate in fairs and are represented by an Export Trading Company because 90% of our products are for the domestic market. However, we do plan to focus more on the U.S. market.”*

Regarding specific projects dedicated to grape juice, several suggestions were shared by the participants. E2 (Winemaking Cooperative 1) stated, *“There should be a project like the one we had before with Ibravin. Today, UVIBRA is restructuring, and there’s no clear reference point.”*



E3 (Winemaking Cooperative 2) added, *“When Ibravin was active, it did a lot of work with wine, and that effort could be revived and applied to juice. We really miss having a project focused on juice. We participated in fairs in Paraguay with support from our distributor, as well as in the U.S., China, and Germany through Apex. We present all our products and also try to bring customers to the cooperative to show them the entire grape juice process.”*

Similarly, E1 (Juice Industry 1) noted, *“There was a significant effort for wine, but nothing comparable for juice.”*

From this perspective, we gain a clearer understanding of the role of institutional agents in the production chain. These agents were primarily established to support wineries in growing in a structured way, boosting domestic sales, and facilitating their internationalization efforts. Organizations like UVIBRA play a key role in helping wineries participate in international fairs by sharing costs and information—essential support, given the high expense of individual participation. They also promote initiatives such as technical, legal, and marketing assistance for both domestic and international markets, focusing on commercial promotion (Monticelli *et al.*, 2018).

Reports, observations, and analyzed documents highlight the crucial role of these entities in supporting the internationalization process of the studied sector. It was also noted that the sectoral project *Wines of Brazil*, managed by UVIBRA-Consevitis in partnership with Apex-Brasil, has focused heavily on wine in recent years. However, the companies studied are now seeking more support for grape juice and sparkling wines. E5, a key informant from Winemaking Industry 1, emphasized this importance: *“UVIBRA, together with Apex, is essential because it provides support and shares costs. The company cannot handle everything on its own.”*

However, cooperation among participants is still minimally encouraged by the entities involved. As E3 from Winemaking Cooperative 2 noted, *“There is no real cooperation—very little among the companies. Cooperation happens only among the people working in exports.”*

This highlights the role of institutions such as UVIBRA, which manages the financial aspects of the *Wines of Brazil* and *100% Grape Juice of Brazil* projects, as well as the knowledge and relationships within the supply chain. As a formal structure, UVIBRA has the capacity to guide or constrain the decisions of participating entities. Its influence can be positive, negative, or neutral in promoting international integration. The effectiveness of these entities in facilitating or hindering the internationalization process depends on contextual factors, as demonstrated in this case study (Monticelli, Cislighi & Maracajá, 2025).

The institutional environment of the studied sector includes organizations and institutional agents with distinct resources and specific interests. On one hand, certain changes, such as the closure of Ibravin and the restructuring of UVIBRA, have disrupted efforts to support the sector's international integration, especially for grape juice (Monticelli *et al.*, 2018). On the other hand, some organizations and institutional agents have benefited from these changes, focusing their efforts on expanding the commercial reach of traditional products like wine.

The creation, reproduction, and decline of institutions (deinstitutionalization) cannot be understood without considering conflicts of interest and the resources available. As DiMaggio (1988, p. 14) explains, all actors, whether individual or collective, have some level of interest and resources. He states that "*new institutions emerge when organizational actors with sufficient resources (institutional entrepreneurs) identify an opportunity to pursue interests they value.*" Similarly, institutions are either sustained or dismantled based on these dynamics.

In these processes, organizational fields take shape, with certain actors, like UVIBRA, holding central roles. These actors have the interests and resources needed to establish their own institutional logics and governance systems, which, in turn, influence the structure and activities of individual organizations.

The data indicates that UVIBRA, through its projects promoting the internationalization of the winemaking sector, operates in two distinct organizational fields—one focused on traditional wines and sparkling wines, and the other on grape juice. These projects are designed to reach specific target audiences by implementing actions tailored to the needs of each sector. These actions are connected to the development of public policies and the strategic allocation of available resources, directed toward their respective areas of interest.

### **Main Strategies, Motivations, and Investments Made by Companies to Open New Markets and Consolidate Existing Ones for Grape Juice**

The organizations in the studied context are adapting to meet the specific needs of each importer. However, there is little alignment between supply and demand, as few studies focus on production and market trends. This lack of research limits direct cooperation and strategic production planning for companies in the sector (Molle, 2021).

The main strategies currently employed by the companies, as discussed in subsection 4.2, include participation in international fairs. Some companies, such as Winemaking Cooperative 2 (E3), Winemaking Industry 1 (E5), and Winemaking Cooperative 3 (E6), have dedicated budgets for exports. Winemaking Industry 1 (E5), which is one of the most internationally advanced, shared, "*We have specific stores in the international market with our*



*brand.*" Juice Industry 1 (E1) noted, *"We want to expand the market, but we are being cautious since we've invested many years without seeing significant returns."* Meanwhile, both Winemaking Cooperative 1 (E2) and Juice Industry 2 (E4) stated that they operate based on market demand.

During the pandemic, juice exports increased, as noted by Winemaking Cooperative 1 (E2): *"We were very active during the pandemic. China was buying as usual, and we participated in many online business matchmaking events."* Similarly, Winemaking Cooperative 3 (E6) stated, *"Things continued as normal; we also participated in online business matchmaking events."* Juice Industry 2 (E4) added, *"We saw a significant rise in juice exports. We began receiving more price inquiries and sample requests because, with the currency devaluation, the product became more attractive to importers."*

When discussing plans to increase grape juice exports, the interviewee from Winemaking Cooperative 1 (E2) shared, *"We run campaigns for the international market if requested by customers, as grape juice caters to a niche audience."* Similarly, Winemaking Cooperative 2 (E3) noted, *"We are focusing more on juice to drive further growth."* E5 and E6 also expressed their intent to expand their presence in the international market.

In international negotiations, successful global marketing depends on a well-structured strategic plan. This plan should analyze the industry, assess competition, and identify the organization's competitive advantages, enabling it to develop and differentiate itself in foreign markets (Keegan, 2005).

In this context, the unique qualities of grape juice identified by the interviewed companies stand out. For Winemaking Cooperative 1 (E2), *"Our differentiator is the taste—higher acidity and not overly sweet. Exporting carbonated juice was also a big advantage"*; for Winemaking Cooperative 2 (E3): *"Our edge is having multiple packaging options, all filled by us, ensuring quality and reliable delivery."* E5 from Winemaking Industry 1 comments, *"he differentiator is that the juice is 100% natural, healthy, and tastes great."* E6 from Winemaking Cooperative 3 summarizes, *"We focus on the story of family farming and care for our producers."* Therefore, creating value for the customer and other stakeholders emerges as one of the main challenges in the food supply chain. Meeting the product safety and quality requirements at all stages along the chain is crucial for the success of international negotiations (Tavares, 2022).

It is important to highlight that all six companies interviewed expressed, during the interviews, and through observations and analysis of internal documents such as negotiation

materials, the need to adapt their processes to meet the demands of the international market. This is illustrated by the following statements from E1, E2, E4, E5, and E6.

Winemaking Cooperative 1 (E2) emphasized the need to modify labels for different countries: *“In addition to the label, we sometimes need to adjust the bottles and, in rare cases, even the liquid. The product doesn’t carry the cooperative’s brand but the one requested by the customer.”* E3 from Winemaking Cooperative 2 noted, *“These are logistical challenges that we need to adapt to.”* E6 from Winemaking Cooperative 3 mentioned, *“For biodynamic juice, the documentation is different.”* E5 from Winemaking Industry 1 added, *“We change the label based on the country, but most of the time, it’s under our own brand.”*

When a company decides to enter international markets, it often encounters challenges, particularly those related to being new in the market. To address this, organizations need to focus on building knowledge in areas such as marketing, international logistics, and multiculturalism. This helps them gain legitimacy and develop the expertise needed to operate effectively in different institutional environments (Cislaghi *et al.*, 2017).

### **Identification of Opportunities and Challenges in the Grape Juice Export Process**

The final section of the question guide focused on identifying the opportunities and main challenges in the grape juice export process. In addition to the basic documents required for export (Proforma Invoice, Commercial Invoice, Packing List, Bill of Lading, Certificate of Origin, and Transport Insurance Certificate or Policy) and customs clearance—a legal process for authorizing cargo entry or exit through Customs—there are additional steps specific to grape juice exports. These include specialized certificates and documentation that go beyond a "standard" export operation.

At this stage, Juice Industry 1 explains, *“We need international organic certifications.”* Similarly, E2 and E3 mention the same requirement. According to Winemaking Cooperative 1 (E2), *“For the European Union, we need the VII form, as well as a product analysis and a quality report. The lab authorized by the Ministry of Agriculture, Livestock, and Supply (MAPA) for this is located only in São Paulo. Additionally, for China, we require a certificate of origin.”* Winemaking Cooperative 2 (E3) adds, *“We need Halal certification for the Muslim market, and by 2025, Fair Trade certification.”* Halal Certification is a process where a government-regulated agency or a recognized Islamic organization certifies that the industry complies with Halal procedures and can produce, store, and market products suitable for Muslim consumers (Siscomex, 2022).



According to Sebrae (2016), *“The International Federation of Alternative Trade defines Fair Trade as a commercial partnership grounded in dialogue, transparency, and respect, with the goal of promoting greater equity in international trade.”* Its purpose is to contribute to *“sustainable development by ensuring better trading conditions and protecting the rights of producers and workers who are marginalized in the market, particularly in the Global South.”* Additionally, *“licensees are companies authorized to use the Fair Trade label by paying licensing fees, which are granted by national initiatives or the Fairtrade Labelling Organizations International (FLO).”*

E5 from Winemaking Industry 1 notes, *“We have the Vegan certificate—Vegan Society.”* The Vegan Certificate, also known as the Vegan Seal, is similar to the *kosher* or organic label. It certifies that products are not tested on animals, contain no animal-derived ingredients, and are cruelty-free—free from harm or exploitation of animals (Veganism, 2022).

For the U.S. market, as is the case with Juice Industry 1, Winemaking Cooperative 2, and Winemaking Industry 1, notification to the Food and Drug Administration (FDA) is required. The FDA is the federal agency responsible for safeguarding public health in the United States and regulating food, beverages, tobacco, cosmetics, medical devices, medications, and vaccines. *“Every food shipment to the U.S. must be reported to the FDA before it arrives at a U.S. port; this process is known as Prior Notice”* (ApexBrasil, 2018).

The need for international certifications is a crucial part of international trade routines. Supplying food to other countries requires investments in the product, production processes, workflow, and coordination among supply chain participants. It also demands a thorough understanding of current regulations. Aligning all involved parties is essential to ensure a seamless process and to guarantee that the juice reaches consumers safely (Tavares, 2022).

To better understand the challenges in the grape juice export process, secondary documents and interview excerpts were analyzed. According to E1 from Juice Industry 1 and E2 from Juice Industry 2, the primary difficulty lies in international freight. E4 explained, *“Freight costs rose from \$1,500 to \$10,000 during the pandemic and post-pandemic years.”* Another significant obstacle is the shortage of bottles in the market. E2 from Winemaking Cooperative 1 shared, *“We had to stop selling because we ran out of bottles.”* Similarly, E4 from Juice Industry 2 stated, *“We are looking for alternatives, like exporting with PET bottles. This allowed us to export 37% more since PET is lighter than glass, but the foreign market is somewhat resistant to PET bottles.”*

Another challenge highlighted by E2 from Winemaking Cooperative 1 and E6 from Winemaking Cooperative 3 is the difficulty in finding the right importer. Both noted, *“We still*



*haven't found the right importer.*” This reflects the core reality of internationalization, which requires long-term effort, strategic planning, and key decisions, such as selecting the best entry mode and forming partnerships. Sectoral Projects can play a crucial role in collectively promoting the industry rather than focusing on individual efforts, helping to strengthen Brazil's brand (Minervini, 2008).

Despite the challenges, the participants in the study also highlighted opportunities related to internationalization. E1 from Winemaking Cooperative 1 stated, *“Without an export sector, we would need to invest in marketing to understand what's happening abroad. For example, from 2020 to 2021, we grew by about 89%.”* E3 from Winemaking Cooperative 2 noted, *“Exporting drives progress in the company's culture because it pushes us to improve technical and bureaucratic processes, leading to greater specialization.”* E4 from Juice Industry 2 added, *“Exporting adds value to the product since we serve more demanding and selective customers. This also boosts our domestic sales because we're exporting.”*

According to Minervini (2008), a common mistake companies make is failing to evaluate their export culture and not promoting it within their internal management. Another overlooked aspect is the failure to consider the cultural differences and specific requirements of target countries. However, when organizations recognize and promote their export potential and culture, while making improvements and adjustments in areas like marketing, communication, project management, human resources, overall management, and production, all departments can work together more effectively. This coordinated effort optimizes processes, facilitates quick information sharing, and fosters a deeper understanding of internationalization. Such a collective approach significantly increases the chances of success in foreign markets.

### **Summary of Findings and Contributions of the Research**

In terms of grape-derived products, Serra Gaúcha is the leading producer, particularly of grape juice, which is the focus of this study. The research indicates that the participating companies have a history of internationalization, guided by either behavioral or economic approaches, and prominently influenced by aspects of Institutional Theory.

Several factors explain why some companies have not yet achieved greater success in international trade: (i) they see the process as merely an extension of the domestic market; (ii) they do not approach exports strategically; (iii) they lack clear strategic objectives and dedicated budgets; and (iv) they attempted to export but were unsuccessful due to insufficient evaluation of both internal and external factors (Minervini, 2008).



It is important to note the influence of symbolic elements in the international market. These elements limit the expansion of products that differ from those traditionally exported by Brazil. Consequently, there are no dedicated negotiation spaces abroad, such as international fairs, for these products. Another noteworthy aspect is how organizations respond to these symbolic pressures, such as by “Brazilianizing” grape juice with the addition of açaí, a fruit widely recognized as uniquely Brazilian.

To mitigate challenges and support the internationalization process, affiliation with entities such as UVIBRA-ApexBrasil through Sectoral Projects, such as *Wines of Brazil*, serves as a key differentiator for strategic and well-planned internationalization. However, it is evident that specific projects for grape juice are needed. Reactivating the *100% Grape Juice of Brazil (Suco de Uva 100% do Brasil)* project, which is currently inactive, is essential. Support from these entities has proven critical for the studied supply chain, facilitating strategic planning in foreign trade and enhancing the promotion of Brazilian products—not on an individual level, but collectively through a sector-wide approach.

In this context, a decline was noted in the development of a potential organizational field (Scott & Meyer, 1999) that supports the diversification of winemaking companies' production and the commercial growth of traditional products like wines and sparkling wines.

In terms of strategies, motivations, and investments, organizations adjust their approach to meet customer needs. As previously noted, participation in international fairs is one of the main practices. Most participants allocate a specific budget for exports, while others operate based on demand. During the pandemic, exports saw an increase. In this context, the interviewed companies highlighted the distinctive qualities of grape juice and stressed the importance of adapting their processes to meet the requirements of the international market.

In conclusion, an analysis of the opportunities and challenges in the grape juice export process reveals several benefits of internationalization. These include increased product value in the domestic market, enhanced company image among employees, suppliers, customers, and other supply chain members, process improvements, a strengthened organizational culture that supports export activities, and targeted investments in specific sectors, such as recognizing the importance of human resources for the international market, among other advantages.

Among the challenges are the rising costs of international freight and the shortage of raw materials, as well as the lack of coordinated efforts and cooperation within the sector, which entities could help facilitate. Additionally, there are no specific events or projects dedicated to grape juice, as previously mentioned. Significant sector-level work is needed for grape juice to access new markets.

However, several key points were highlighted by the interviewees. The main differentiators include 100% natural juice, which offers advantages over wine due to the presence of polyphenols without containing alcohol. Additionally, the socioeconomic importance of grapes and their derivatives is noteworthy. Over 200,000 people, primarily small families, depend on this product. The history of family farming, cooperativism, and the health benefits of grape juice are valuable selling points for customers and participants in this food chain (Tavares, 2022). Table 5 provides a summary of these contributions.

**Table 5**

*Summary of the Study's Contributions*

Constructs	Main Findings	Empirical Evidence
Institutional Agents	<p>Entities in the Grape and Wine Production Chain</p> <p>The importance of these Entities to Companies</p> <p>The support from these entities has proven essential for the strategic planning of organizations in foreign trade and for better promotion of Brazilian products, not individually, but collectively (sector wise).</p> <p>How Cooperation is stimulated by entities</p>	<p><i>UVIBRA, Consevitis, ApexBrasil, Wines of Brazil Project, and 100% Grape Juice of Brazil Project</i></p> <p><i>“For export, support from APEX. Productive capacity building” (E1).</i></p> <p><i>“Sharing information” (E4).</i></p> <p><i>“It’s difficult to grow alone” (E5).</i></p>
Strategies and Motivations for Grape Juice Exports	<p>Strategies used to acquire (new) and retain existing customers</p> <p>Participation in fairs is crucial for product promotion, especially through tastings.</p> <p>Market reach is carefully managed to ensure the best possible outcomes.</p> <p>Development of strategies that allow for delivering the right product, in the right place, at the exact moment of the buyer's need.</p>	<p><i>“We want to expand the market, but we are cautious because we’ve invested many years and reaped few rewards” (E1).</i></p> <p><i>“The last fair we attended in person was in Colombia; additionally, we participated in several online business matchmaking events during the pandemic” (E2).</i></p> <p><i>“We have a specific budget to acquire new customers and maintain existing ones” (E5, E6).</i></p>
Opportunities and Challenges in the Internationalization Process	<p>What Exporting provides for the company</p> <p>Grape juice must be internationally recognized, just like Brazilian wines and sparkling wines.</p> <p>Differentiated products, quality, organic and biodynamic juices.</p> <p>Key points and main challenges found in the process</p>	<p><i>“Realities abroad and within the country are very different” (E3).</i></p> <p><i>“Consumers abroad are not familiar with the juice” (E3).</i></p> <p><i>“Through export, we’ve made contact with more people, we’ve managed to be seen” (E5).</i></p> <p><i>“Valuing the product, by exporting, we serve more selective and</i></p>



Constructs	Main Findings	Empirical Evidence
		<p><i>demanding customers. The sector competes with the global industry and shows that it has this potential” (E4).</i></p> <p><i>“Efforts should focus on making grape juice as recognized as wine by revitalizing projects specifically dedicated to juice” (E5).</i></p>

Source: prepared by the authors (2022).

### Final Considerations

The primary objective of this study was to identify the opportunities and challenges in the grape juice export process from winemaking enterprises in the Serra Gaúcha region (RS), Brazil. Through a comprehensive literature review conducted during the research, the study explored the internationalization of companies, entry strategies into foreign markets, the role of sectoral entities, and the connections necessary for achieving success in international trade. These entities were established to support wineries in developing in a structured manner, boosting domestic sales, and facilitating the internationalization process.

The findings of this study contribute to and advance the theoretical literature on business internationalization, offering insights that extend beyond the winemaking sector and may be relevant to organizations across various industries. For winemaking companies in particular, these contributions can enhance their competitiveness in the global market while also fostering the growth and preservation of local communities and culture.

Winemaking Cooperative 1 demonstrates extensive knowledge of internationalization, serving numerous countries and participating in the foreign market since the 1960s. Over time, the Cooperative has clearly evolved, learning valuable lessons, including what practices to avoid. In contrast, other companies have more limited experience in international trade. Winemaking Industry 1, active in the foreign market since 2003, has significant experience and operates under its own brand. Similarly, Winemaking Cooperative 2 has been exporting since 2012. However, Juice Industry 1, Juice Industry 2, and Winemaking Cooperative 3 have only recently entered the market, starting their export activities between 2015 and 2018.

The study offers practical contributions by providing insights and guidance to winemaking companies on grape juice exports. It enables a better understanding and analysis of export processes, presents workflows, required certifications, and real-life examples,

demonstrating that exporting is a viable option even for small family-owned businesses or cooperatives.

Another practical contribution, grounded in Institutional Theory and the findings of this study, is the distinction between entities responsible for promoting grape juice products. With the closure of Ibravin and UVIBRA's ongoing restructuring to address this demand, certain challenges have emerged in continuing the sector's initiatives. The reports clearly highlight that support from these entities is essential for strategic planning in the international market and for more effective promotion of Brazilian products—not on an individual level, but collectively, through a sectoral approach.

The institutional environment of the winemaking sector in Serra Gaúcha includes organizations and agents with specific interests and resources within the industry. These entities often focus on strategic actions to differentiate themselves through traditional products like wine. At the same time, other organizations and agents aim to expand commercially, often to support the survival of rural producers by developing alternative products, such as organic grape juice, tailored to the needs of the region.

Understanding the institutional environment in which organizations operate provides insight into the relationships shaped by the interests and resources of certain institutions, which allow them to influence and define organizational fields. UVIBRA, currently the leading institutional agent in the sector due to its legitimacy and resources, plays a key role in managing and shaping public policy applications within interest groups. This ensures the success of its sectoral projects and reinforces its position as a representative and facilitating organization.

One of the social forces influencing the organizational field of the sector is the tendency to prioritize organizations focused on traditionally exported products, such as wine. This focus often comes at the expense of smaller organizations, frequently cooperatives, that concentrate on grape juice.

This research explored how this process takes place and aims to provide insights that support the development of more balanced public policies. These policies should consider factors beyond the economic logic driven by the sector's dominant economic players. Furthermore, the study seeks to contribute to the economic and social growth of the organizations and the region they represent.

Although many studies analyze markets and emerging companies through the lens of Institutional Theory (Kostova & Marano, 2019), few focus on the internationalization of small companies from emerging markets, which are more sensitive to the institutional environment

(Steinhauser, Rocha & Paula, 2022). This empirical study seeks to contribute to the theoretical development of Institutional Theory by addressing this gap.

During the study, challenges were encountered in securing interviews with companies. Not all contacts agreed to participate, which limited the sample to six companies. This constraint impacts the depth of the analysis and restricts the broader applicability of the findings. Additionally, the diversity of participants posed a limitation. Some companies focus exclusively on juice and lack expertise related to wine, while others differ significantly in size and nature, including cooperatives (with their unique philosophies) and non-cooperative industries already established in the global market.

For future studies, it would be valuable to conduct research in a similar context but involving wineries outside the Serra Gaúcha region (RS). Additionally, further investigation into grape juice exports is necessary, as limited secondary data in this area hindered more concrete findings. Comparative studies between different grape juice-producing regions in Brazil are also encouraged to identify similarities and differences in the challenges faced and strategies adopted by companies.

Future research could also explore market trends for grape juice, including consumer demand, product preferences, and opportunities for expansion in specific international markets. Investigating sustainable practices in the production and export of grape juice—considering environmental, social, and economic factors—would provide valuable insights. Lastly, studying the impact of partnerships with formal institutions, such as UVIBRA and ApexBrasil, on the internationalization of winemaking companies and the promotion of Brazilian grape juice in global markets is another promising area for exploration.

## References

Abe (2022). Associação Brasileira de Enologia. *Conheça a ABE*. Disponível em:

<https://www.enologia.org.br/abe/>. Acesso em: 28 mai. 2022.

AhmadI-Gh, Z., Bello-Pintado, A., Bortolotti, T., & Boscarri, S. (2024). Sustainability drivers and national culture in buyer-supplier environmental practices: an institutional perspective. *European Business Review*, Vol. ahead-of-print, No. ahead-of-print.

<https://doi.org/10.1108/EBR-06-2023-0183>



- Alaby, M. A. (2021). *O que é internacionalização de empresas?*. Disponível em: <https://dcomercio.com.br/categoria/opiniao/o-que-e-internacionalizacao-de-empresas>  
Acesso em: 10 ago. 2023.
- Agavi (2022). Agência Brasileira de Promoção de Exportações e Investimentos. *Quem somos*. Disponível em: <https://agavi.com.br/site/>. Acesso em: 28 mai. 2023.
- ApexBrasil (2022). Agência Brasileira de Promoção de Exportações e Investimentos. *Quem somos*. Disponível em: <https://apexbrasil.com.br/br/pt/sobre-a-apex-brasil.html> Acesso em: 15 mai. 2023.
- ApexBrasil (2018). Pesquisa Ibravin-Apex-100% Grape Juice of Brazil. *Whole grape juice and grape juice market research*, USA, 2018.
- Associação Brasileira de Elaboradores de Suco de Uva Puro (2022). *Associação*. Disponível em: <https://www.sucodeuvapuro.com.br/associacao/>. Acesso em: 28 mai. 2022.
- Bardin, L. (2010). *Análise de conteúdo*. (1977). Lisboa (Portugal): Edições.
- Brasil. (2024). Ministério da Agricultura, Pecuária e do Abastecimento (Mapa) (2024). *Institucional*. Disponível em: <https://www.gov.br/agricultura/pt-br>. Acesso em: 23 jan. 2024.
- Brasil. (2023). Ministério da Agricultura, Pecuária e do Abastecimento (Mapa) (2023). *Missão, visão e valores*. Disponível em: <https://www.gov.br/agricultura/pt-br/acesso-a-informacao/institucional/age/plano-estrategico-do-mapa/missao-visao-valores>. Acesso em: 23 jan. 2024.
- Caldas, M., Fachin, R., & Fischer, T. (2007). *Handbook de estudos organizacionais - modelos de análise e novas questões em estudos organizacionais*, v. 1, São Paulo: Atlas.
- Canal Rural. (2023). *Suco de uva e espumantes têm aumento de produção na safra 2023*. Disponível em: <https://www.canalrural.com.br/nacional/rio-grande-do-sul/suco-de-uva-e-espumantes-registram-aumento-na-safra-2023/>. Acesso em: 02 out. 2023.

- Carneiro, J. M. T., & Dib, L. A. (2007). Avaliação comparativa do escopo descritivo e explanatório dos principais modelos de internacionalização de empresas. *Revista Eletrônica de Negócios Internacionais (Internext)*, 2(1), 1-25.  
<https://doi.org/10.18568/1980-4865.211-25>.
- Cislaghi, T. P., Fernandes, E. B., & Wegner, D. (2017). O processo de internacionalização na transformação das capacidades dinâmicas de pequenas empresas. *Revista de Empreendedorismo e Gestão de Pequenas Empresas*, 6(3), 584-615.  
<https://doi.org/10.14211/regepe.v6i3.659>
- Comexstat (2024). Governo Federal. *Exportação e importação geral*. Disponível em:  
<http://comexstat.mdic.gov.br/pt/geral>. Acesso em: 18 jan. 2024.
- Conab. (2019). Companhia Nacional de Abastecimento. *Compêndio de Estudos Conab. Visão Analítica da Viticultura Sul-Rio-Grandense*. ISSN: 2448-3710. v.19. Brasília.
- Dalmoro, M. (2012). The formation of country wineries networks for internationalization: an analysis of two new world wines regions. *Journal of Wine Research*, 24(2), 96–111.  
<https://doi.org/10.1080/09571264.2012.747086>
- Dani, C. (2022). *Benefícios do suco de uva puro*. Associação Brasileira de Elaboradores de Suco de Uva Puro. Disponível em: <https://www.sucodeuvapuro.com.br/beneficios-do-suco-de-uva-puro/#principais-efeitos>. Acesso em: 08 jun. 2022.
- Da Silva Alchieri, A. P., Dalbosco, I. B., & Do Nascimento, S. (2017). Dimensões do empreendedorismo internacional das PMEs exportadoras do Sul do Brasil. *Revista da Micro e Pequena Empresa*, 11(2), 2-17. <https://doi.org/10.21714/19-82-25372017v11n2p217>
- De Souza, E. C. L., & Fenili, R. R. (2012). Internacionalização de empresas: perspectivas teóricas e agenda de pesquisa. *Revista de Ciências da Administração*, 14(33), 103-118.  
<https://doi.org/10.5007/2175-8077.2012v14n33p103>

- Dimaggio, P. J., & Powell, W. W. (1983). The iron cage revisited: Institutional isomorphism and collective rationality in organizational fields. *American Sociological Review*, 48(2), 147-160.
- Dias Filho, J. M. (2003). Gestão tributária na era da responsabilidade fiscal: propostas para otimizar a curva da receita utilizando conceitos da semiótica e regressão logística, 2003. In; *Tese* (Doutorado) – Faculdade de Economia, Administração e Contabilidade, Universidade de São Paulo, São Paulo.
- Duarte, D. V., & Tavares, B. (2012). *Institucionalismo e determinações governamentais: evidências de isomorfismo em empresas de base tecnológica*. Artigo apresentado em ENAPG - Encontro de Administração Pública e Governança, 2012. Disponível em: [http://www.anpad.org.br/admin/pdf/2012\\_EnAPG211.pdf](http://www.anpad.org.br/admin/pdf/2012_EnAPG211.pdf). Acesso em: 16 ago. 2021.
- Dunning, J. H. (1988). The eclectic paradigm of international production: a restatement and some possible extensions. *Journal of International Business Studies*, 19(1), 1-31.
- Eisenhardt, K. M. (1989). Building theories from case study research. *The Academy of Management Review*, 14(4), 532-550. <https://doi.org/10.2307/258557>
- Farias, J. G. (2021). Análise de exportação de vinho em 2020: o caso do Vale do Rio São Francisco. *Revista Brasileira de Gestão, Negócio e Tecnologia da Informação – EmpíricaBR*. 1(1). <https://doi.org/10.15628/empiricabr.2021.13252>
- Fecovinho. (2022). Federação das Cooperativas Vinícolas do Rio Grande do Sul. *Histórico*. Disponível em: <http://www.fecovinho.coop.br/secao.php?pagina=1>. Acesso em: 28 mai. 2023.
- Flick, U. (2012). *Introdução à metodologia de pesquisa: um guia para iniciantes*. Penso Editora.
- Johanson, J., & Vahlne, J.-E. (1977). The internationalization process of the firm - a model of knowledge development and increasing foreign market commitments. *Journal of International Business Studies*, 8(1), 23-32. <https://doi.org/10.1057/palgrave.jibs.8490676>



- Hidalgo, G., Monticelli, J. M., Pedroso, J., Verschoore, J. R., & De Matos, C. A. (2022). The influence of formal institution agents on cooperation in the organic food industry. *Journal of Agricultural & Food Industrial Organization*, 20(2), 61-74. <https://doi.org/10.1515/jafio-2019-0009>
- Hitt, M. A. (2016). International strategy and institutional environments. *Cross Cultural & Strategic Management*, 23(2), 206-215. <https://doi.org/10.1108/ccsm-11-2015-0168>.
- Ioppi, F. S., Vieira, G. B. B., & Gonçalves, R. B. (2020). Barreiras técnicas como protecionismo. Percepção dos exportadores de vinhos brasileiros. *Revista de Política Agrícola*. 1. 6-21.
- Keegan, W. J. (2005). *Marketing global*. São Paulo: Pearson Prentice Hall.
- Kostova, T., & Marano, V. (2019). Institutional theory perspectives on emerging markets. In: Grosse, R., & Meyer, K. E. (eds.) *The Oxford Handbook of Management in Emerging Markets*. New York: Oxford University Press. (pp. 99-126).
- Minervini, N. (2008). *O exportador: ferramentas para atuar com sucesso no mercado internacional*. 5. ed. São Paulo: Pearson Prentice Hall.
- Molle, V. R. D. (2021). *Análise da capacidade de acompanhamento das tendências de comercialização de sucos de uva: um estudo aplicado às cooperativas da Serra Gaúcha*. Dissertação (Mestrado) - Universidade de Caxias do Sul, Programa de Pós-Graduação em Biotecnologia.
- Monticelli, J. M., Garrido, I. L., & Dal-Soto, F. (2016). Do Institutions Matter? The case of wines manufacturer from an emerging economy, The Challenge of Bric Multinationals. In: *International Business Research*, 11, Emerald Group Publishing Limited, Bingley, 349-367. <https://doi.org/10.1108/S1745-886220160000011018>.

- Monticelli, J. M., Garrido, I. L., & De Vasconcellos, S. L. (2018). Coopetition and institutions: a strategy for Brazilian wineries facing internationalization, *International Journal of Wine Business Research*, 30(1), 74-95. <https://doi.org/10.1108/IJWBR-08-2016-0028>.
- Monticelli, J. M., Cislighi, T. P., & Maracajá, K. F. B. (2025). Exploring barriers arising from coopetition: a case study in the brazilian wine tourism industry. In: Chim-Miki, A. F.; Da Costa, R. A. (eds). *Value proposition to tourism coopetition: cases and tools*, Cap. 12, Emerald Publishing Limited, p. 169-183. doi: <http://doi.org/10.1108/978-1-83797-827-420241012.2025>
- Morrish, S. C. & Earl, A. (2021), Networks, institutional environment and firm internationalization, *Journal of Business & Industrial Marketing*, 36(11), 2037-2048. <https://doi.org/10.1108/JBIM-05-2019-0230>
- North, D. (1990). *Institutions, institutional change, and economic performance*. Cambridge, MA: Cambridge University Press.
- Oiv (2022). Organização Internacional da Vinha e do Vinho. *The OIV*. Disponível em: <https://www.oiv.int/en/the-international-organisation-of-vine-and-wine>. Acesso em: 28 mai. 2022.
- Petricevic, O., & Teece, D. J. (2019). The structural reshaping of globalization: Implications for strategic sectors, profiting from innovation, and the multinational enterprise. *Journal of International Business Studies*, 50(9), 1487-1512. <https://doi.org/10.1057/s41267-019-00269-x>
- Pivetta, N. P., Trindade, N. R., Piveta, M. N., De Oliveira, V. R., & Scherer, F. L. (2021). Produção científica sobre internacionalização e teoria institucional: uma análise bibliométrica a partir das bases de dados *Web of Science e Scopus*. *INTERFACE - Revista do Centro de Ciências Sociais Aplicadas*, 18(1), 48-73.

- Ramalho, P. J. P., Sousa, A. J. C., & Araújo, J. L. P. (2021). Estratégias para o setor vitivinícola brasileiro, em contexto global: desenvolvimentos de gestão no Rio Grande do Sul e no Vale do São Francisco. *ROC-Revista Organizações em Contexto*, 17(33).
- Rizzon, L. A., & Meneguzzi, J. (2007). *Suco de uva*. (Coleção Agroindústria Familiar). Brasília, DF: Embrapa Informação Tecnológica, 45 p.
- Rocha, A. da, & Ávila, H. de A. (2015). Teoria institucional e modos de entrada de multinacionais de países emergentes. *RAE-Revista de Administração de Empresas*, 55(3), 246-257.
- Rodrigues, G. Z., De Vasconcellos, S. L., & Nunes, M. P. (2022). Tripé da estratégia: o papel dos agentes institucionais no processo de internacionalização. *Revista Eletrônica de Negócios Internacionais (Internext)*, 17(1), 81-104.  
<https://doi.org/10.18568/internext.v17i1.622>.
- Scott, W. R. (2001). *Institutions and organizations*. Thousand Oaks: Sage.
- Scott, W. R. & Meyer, J. W. (1999) La organización de los sectores sociales: proposiciones y primeras evidencias. In: Powell, W., DiMaggio, P. *El nuevo institucionalismo en el análisis organizacional*. México: Fondo de Cultura Económica.
- Sebrae. (2016). Serviço Brasileiro de Apoio às Micro e Pequenas Empresas. *O que é Fair Trade (Comércio Justo)*. Disponível em:  
<https://www.sebrae.com.br/sites/PortalSebrae/artigos/o-que-e-fair-trade-comercio-justo,82d8d1eb00ad2410VgnVCM100000b272010aRCRD>. Acesso em: 26 jun. 2022.
- Seuring, S., & Müller, M. (2008). From a literature review to a conceptual framework for sustainable supply chain management. *Journal of Cleaner Production*, 16, 1699-1710.  
<https://doi.org/10.1016/j.jclepro.2008.04.020>



- Seuring, S., Aman, S., Hettiarachchi, B. D., De Lima, F. A., Schilling, L., & Sudusinghe, J. I. (2022). Reflecting on theory development in sustainable supply chain management, *Cleaner Logistics and Supply Chain*, 3. <https://doi.org/10.1016/j.clscn.2021.100016>.
- Silva, A. B. (2007). *Proposta de um conjunto de elementos de estratégia para um ambiente mesocompetitivo: o caso da cadeia vitivinícola gaúcha*. Dissertação – Programa de Pós-Graduação em Engenharia de Produção, Universidade Federal do Rio Grande do Sul, Porto Alegre, 2007.
- Sindivinho RS. (2022). Sindicato da Indústria do Vinho, do Mosto de Uva, dos Vinagres e Bebidas Derivados da Uva e do Vinho do Estado do Rio Grande do Sul. *História*. Disponível em: <http://www.sindivinhors.com.br/Sindicato?mobile=False&menu=2>. Acesso em: 28 mai. 2022.
- Siscomex. (2022). Governo Federal. *Certificação Halal*. Disponível em: <https://www.gov.br/siscomex/pt-br/servicos/aprendendo-a-exportar/conhecendo-temas-importantes-1/certificacao-halal>. Acesso em: 26 jun. 2022.
- Steinhauser, V. P. S., Rocha A., & Paula F. O. (2022) Institutional Theory and international entrepreneurship: a review. *Internext*. 17(2), 264-283. <https://doi.org/10.18568/internext.v17i2.684>.
- Tavares, P. (2002). Aplicação de blockchain na cadeia de suprimentos alimentícia. Quais são os impactos e benefícios do blockchain no Food Supply Chain? *Revista Mundo Logística*, n. 87, ano XV, 74-82.
- Uvibra. (2022). União Brasileira de Vitivinicultura. *Mercado Externo - Do Brasil para o mundo*. Disponível em: <http://www.uvibra.com.br/noticias/01-02-2022-mercado-externo-do-brasil-para-o-mundo>. Acesso em: 27 mai. 2022.
- Uvibra. (2023). União Brasileira de Vitivinicultura. *Quem somos*. Disponível em: <http://www.uvibra.com.br/uvibra/quem-somos>. Acesso em: 02 out. 2023.



Veganismo. (2022). *O que é certificado vegano*. Disponível em:

<https://veganismo.org.br/certificado-vegano/>. Acesso em: 26 jun. 2022.

Vinho Brasileiro.Org. (2021). *Uvibra-Consevitis-RS e Apex-Brasil assinam convênio de promoção ao vinho brasileiro no mercado externo*. Disponível em:

<https://vinhobrasileiro.org/mercado/uvibra-consevitis-rs-e-apex-brasil-assinam-convenio-de-promocao-ao-vinho-brasileiro-no-mercado-externo>. Acesso em: 27 jun. 2022.

Vieira, G. B., Santos, C. H. S., Vidor, G., Gonçalves, R. B., & Giacomello, C. P. (2023).

Efficiency evaluation of cooperatives and wine industries: a study in Southern Brazil.

*International Journal of Productivity and Quality Management*, Inderscience

Enterprises Ltd, 39(3), 287-301. <https://doi.org/10.1504/IJPQM.2023.132258>.

Williamson, O. E. (1975). *Markets and hierarchies: analysis and antitrust implications: a study*

in the economics of internal organization. University of Illinois at Urbana-Champaign's

Academy for Entrepreneurial Leadership Historical Research Reference in

Entrepreneurship.

Williams, C., & Spielmann, N. (2019). Institutional pressures and international market

orientation in SMEs: Insights from the French wine industry. *International Business*

*Review*, 28(5), 101582. <https://doi.org/10.1016/j.ibusrev.2019.05.002>.

WinesOfBrazil. (2022). *Wines of Brazil. Sobre nós*. Disponível em:

<https://www.winesbrazil.org/>. Acesso em: 17 jun. 2022.

Yadav, V. S., Singh, A. R., Gunasekaran, A., Raut, R. D., & Narkhede, B. E. (2022). A systematic

literature review of the agro-food supply chain: challenges, network design, and

performance measurement perspectives. *Sustainable Production and Consumption*, 29, 685-

704. <https://doi.org/10.1016/j.spc.2021.11.019>.

Yin, R. K. (2010). *Estudo de caso: planejamento e métodos*. 22. ed. Porto Alegre. Bookman.

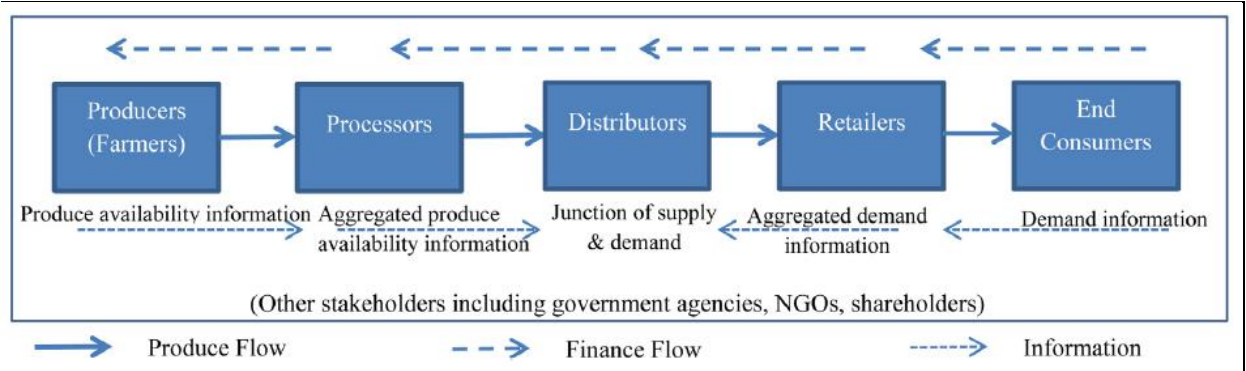
Zen, A. C., Dalmoro, M., Fensterseifer, J. E., & Wegner, D. (2013). The development of resources in interorganizational networks and the internationalization process: the case Wines Of Brasil. *Revista Ibero-Americana de Estratégia - RIAE*, 12(1), 107-130. <https://doi.org/10.5585/ijsm.v12i1.1901>.

Zimieski, R. C. T., & Cislighi, T. P. (2024). Internacionalização do Suco de Uva do Brasil: Oportunidades e desafios do ingresso no mercado italiano. In: *Anais... Simpósio Suco de Uva & Saúde*. Campus Bento Gonçalves do Instituto Federal de Educação, Ciência e Tecnologia do Rio Grande do Sul (IFRS).



ANNEXES AND APPENDICES

Annex A: A diagram of the agricultural food supply chain



Source: Yadav et al. (2022, p. 686).

Appendix A: Case study protocol

Case Study Objective	<ul style="list-style-type: none"> <li>- Understand the export sector of the company, how and in what ways it operates in the foreign market (fairs, strategies, negotiations, adaptations, among others).</li> <li>- Explore the opportunities and challenges related to grape juice exportation.</li> <li>- Analyze the potential impacts of the pandemic on the international landscape of the winemaking industry.</li> </ul>
Sources of Information	<ul style="list-style-type: none"> <li>- Observation (at the time of the visit/interview).</li> <li>- Documents (if available).</li> <li>- In-depth semi-structured interviews (open-ended questions).</li> </ul>
Procedures	<ul style="list-style-type: none"> <li>- Initiate contact via email or WhatsApp (referrals from experts and the companies themselves).</li> <li>- Gather general data on the companies.</li> <li>- Schedule the visit/interview.</li> <li>- Analyze the data collected.</li> </ul>
Data Analysis	<ul style="list-style-type: none"> <li>- Analyze the complete content, both within and between cases.</li> </ul>

Source: prepared by the authors based on Yin (2010).

**Appendix B: Question Guide**

<b>Introductory Questions for the Company</b>		
1: Legal name of the company and location. 2: Interviewee/position. 3: Product line. 4: Duration of the interview. 5: Interview format and location. 6: Date of the interview.		
<b>Objectives</b>	<b>Questions</b>	<b>Authors for reference</b>
Identify the role of the participants in the supply chain (contextual and institutional factors)	1) Comment on how the company's internationalization process unfolded (beginning, processes, lessons learned over time, qualifications, training, challenges). 2) Does the company have a specific department responsible for exports/imports? How many employees are part of it? How are the roles/functions/clients divided? Explain briefly about the daily routines. 3) Which entities in the grape and wine production chain is the company a part of (associations, industry organizations, unions, etc.)? Do any of them provide direct assistance with export activities? 4) What is the importance of these entities for the company? Does the company typically participate in meetings, actions, activities, and training offered by these entities? Are their efforts satisfactory? Explain. 5) In your opinion, is there cooperation among companies in the winemaking sector? Is cooperation encouraged by the entities? Explain.	Dimaggio & Powell (1983) North (1990) Pivetta <i>et al.</i> (2021)
Describe the main strategies, motivations, and investments made by companies to open new markets and consolidate existing ones for grape juice	1) Currently, which products are exported by the company? 2) What is the percentage of the company's revenue that comes from exports? Does the company plan to increase its participation in the international market? 3) Which country does the company export to the most? And which product is the most exported? 4) What are the main costs involved in export operations? Is there a minimum value for an export shipment? 5) What strategies does the company use to acquire (new) and retain current clients? (frequency of visits, marketing campaigns, participation in international fairs, etc.). Is there a specific budget for exports? 6) What are the main adaptations made to products and/or processes to serve international markets? Please provide examples (adaptations/countries). 7) Regarding grape juice: what type of grape juice is exported? 8) What percentage do grape juice exports represent for the company? Is there any plan to increase grape juice exports? 9) What specific strategies, motivations, and investments has the company made in grape juice for international markets? What are the key differentiators of the product in international markets? 10) In your opinion/knowledge, what are the main reasons/motivations why grape juice is not exported in large quantities such as wine/sparkling wine? Are these internal organizational factors or contextual and institutional factors (government, legislation, lack of incentives, market access difficulties, lack of consumer awareness, etc.)? Please provide examples. 11) Are there any "extra" procedures/precautions/certificates/documents that need to be adopted for grape juice exports (and that differ from wine and sparkling wine)? 12) In the context of the pandemic, has there been any change in the grape juice export market? If so, what would those changes be?	Williamson (1975) Johanson & Vahlne (1977) Monticelli, Garrido & Dal-Soto (2016)
Identify opportunities and challenges encountered in the grape juice export process	1) In your opinion, what are the main opportunities that internationalization provides for the sector? And for the company? 2) In your opinion, what are the main difficulties/obstacles encountered in the grape juice export process for the sector? And for the company specifically? 3) In general, what are the challenges encountered in grape juice exportation? Do you have any suggestions for how these challenges could be overcome? 4) In your opinion, what can be learned from the trajectory of Brazilian wine and sparkling wine exports, which are already internationally recognized, in relation to grape juice exports?	Minervini (2008) Monticelli, Garrido & De Vasconcelos (2018) Molle (2021)

Source: prepared by the authors based on the theoretical framework authors (2021)



### Appendix C: Types of Grape Juice Produced by the Interviewed Companies

Interviewed Companies	Juices Produced and Their Characteristics
Juice Industry 1	<b>Organic Grape Juice:</b> No preservatives, not pasteurized, no pesticides, 100% Bordô grape.
Winemaking Cooperative 1	<p><b>Organic Grape Juice:</b> No added sugar, preservatives, or pesticides, made from American grapes from family production.</p> <p><b>Red Grape Juice (100% Pure Juice):</b> No added sugar, water, or coloring. Made from red American grapes.</p> <p><b>White Grape Juice (100% Pure Juice):</b> No added sugar, water, or coloring. Made from white American grapes.</p> <p><b>Carbonated Grape Juice:</b> No added preservatives, coloring, or sugar. Only carbon dioxide added. Made from red American grapes.</p>
Winemaking Cooperative 2	<p><b>Organic Grape Juice:</b> No added sugar, free from agricultural chemicals and preservatives, made from American, Isabel, and Bordô grapes.</p> <p><b>Red Grape Juice (100% Pure Juice):</b> 100% natural, no preservatives, no added sugar, produced with American, Isabel, and Bordô grapes.</p> <p><b>White Grape Juice (100% Pure Juice):</b> 100% natural, no preservatives or sugar. Produced with white American grapes, Niagara white, and Moscato.</p> <p><b>Rosé Grape Juice (100% Pure Juice):</b> No added sugar or water. Made with American grapes, Niagara white, and Bordô.</p> <p><b>Nectar:</b> No preservatives, with 40% juice. In addition to grape nectar juice, Winemaking Cooperative 2 produces nectar juices in other flavors such as pineapple, orange, passion fruit, peach, and apple.</p> <p><b>Reconstituted Juice:</b> Water is removed, and after some time, the water is added back. Considered 100% juice, but it may be sweetened.</p> <p><b>Carbonated Grape Juice:</b> No added preservatives, coloring, or sugar. Only carbon dioxide added. Made from red American grapes. Launched in March 2022.</p>
Juice Industry 2	<p><b>Red Grape Juice (100% Pure Juice):</b> No added sugar, water, or coloring. Made with red American grapes.</p> <p><b>White Grape Juice (100% Pure Juice):</b> No added sugar, water, or coloring. Made with white American grapes.</p> <p>In addition to these, Juice Industry 2 produces mixed juices with grapes, all 100% pure, such as apple and white grape, raspberry and grape, açaí and grape, blackberry and grape, blueberry and grape.</p>
Winemaking Industry 1	<b>Red Grape Juice (100% Pure Juice):</b> No added sugar, preservatives, made with Isabel and Magna grapes, from the São Francisco Valley – BA, a city that allows harvesting throughout the year.
Winemaking Cooperative 3	<p><b>Organic Grape Juice:</b> No added sugar, preservatives, or pesticides, made with Bordô, Isabel, and Concord grapes.</p> <p><b>Red Grape Juice (100% Pure Juice):</b> No added sugar, water, or coloring. Made with Bordô, Isabel, and Concord grapes.</p> <p><b>Astral Grape Juice – Biodynamic:</b> Made through a maceration technology process, the resulting juice undergoes pasteurization and immediate bottling, made with Bordô, Isabel, and Concord grapes.</p>

Source: prepared by the authors based on information from the companies' websites (2022).