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Article

Heritage Narratives and Territorial Branding in Brazilian Sparkling Wine: Altos De Pinto Bandeira and Wines of Brazil

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Abstract

Brazilian wine regions shaped by Italian immigration have long mobilized European lineage to legitimize their production, yet they operate in markets that increasingly reward differentiation, symbolic clarity and specialized territorial identities. Focusing on the Altos de Pinto Bandeira Denominação de Origem (DO) and the Wines of Brazil export program, this article proposes a five-dimension framework for analyzing wine heritage as a communicative and territorial resource in branding communication: time depth, continuity, recognition, valorization and strategic fit. Using a nested multiple case study of five DO-licensed wineries and the national branding program, based on documentary and website analysis, it codes each case along these dimensions and derives a typology of heritage strategies (inherited-fit, reactivated-fit, strategic, invented-fit, misaligned). The results show that heritage becomes most communicatively effective when it exhibits strong strategic fit with both territorial identity and product category, particularly in sparkling wine, where Brazil has achieved its clearest institutional recognition and international visibility. The Altos de Pinto Bandeira DO functions as heritage infrastructure, turning family and cooperative narratives into territorially anchored communicative assets. The article argues that a sparkling-centred strategy aligning Italian-Brazilian heritage with contemporary representations of “Brazilianness” can strengthen Brazil’s wine territorial brand and outlines how the proposed framework can inform the strategic communication of territorial brands in other emerging wine regions seeking place-based development through geographical indications.

Keywords: wine heritage; territorial branding; branding communication; geographical indications; sparkling wine; Brazil

1. Introduction

In global wine markets, New World producers have often sought legitimacy through comparison with established European models, whether by emulating grape varieties, winemaking styles or discourses of tradition and terroir (Porter, 1998). Such strategies can lock emerging regions into a logic of imitation, in which success is implicitly measured by proximity to Old World benchmarks rather than by the development of distinctive territorial identities and product specializations (Barca, 2009; Porter, 1998). This tension is particularly visible in Brazil, where wine regions shaped by Italian migration have historically drawn on European lineage and inherited technical knowledge, but now operate in a competitive environment that rewards differentiation, symbolic clarity and strong positioning (Sanfilippo, 2009; De Majo & Peruchi Moretto, 2021).

In parallel, Brazilian sparkling wine has gained growing recognition and is increasingly presented as the country’s most promising category, with sectoral reports highlighting improvements in quality and visibility and export campaigns framing sparkling wines as a national “calling card” (Tófoli, 2023; Sommeliers Choice Awards, 2024; Wines of Brazil, n.d.). The recent

recognition of Altos de Pinto Bandeira as the first denomination of origin in the New World dedicated exclusively to traditional-method sparkling wines reinforces the link between place, regulation and specialized product identity (Decanter, 2023; Tófoli, 2023). These developments raise a broader strategic question: can emerging wine regions derive advantage by combining two apparently different resources – migration-based heritage linked to Italian settlement and family continuity, and a contemporary, nationally coded image that associates “Brazilianness” with festivity, conviviality and openness (De Majo & Peruchi Moretto, 2021; Paasi, 2010)?

From a regional-development perspective, this alignment between heritage and contemporary strategy is not merely symbolic. Paasi conceptualizes regions as social processes institutionalized through narratives, symbols, boundaries and organizations, rather than as pre-given containers (Paasi, 1986, 2002, 2010). Barca’s place-based approach similarly stresses that development strategies are most effective when they mobilize territorially specific assets instead of applying generic policy models (Barca, 2009), while Porter’s cluster perspective underlines the importance of shared reputation, identity and specialized product focus for regional competitiveness (Porter, 1998). Taken together, these frameworks suggest that for Brazilian wine regions the most promising strategy may not be to “Europeanize” their still wines, but to articulate Italian-derived heritage and contemporary national identity in a product category where both resonate strongly: sparkling wine (Barca, 2009; Paasi, 2010; Porter, 1998; De Majo & Peruchi Moretto, 2021).

At the same time, research on wine, heritage and territorial identity shows that wine regions are not only productive spaces, but also symbolic landscapes in which narratives of origin, continuity and place are actively constructed (Harvey, White & Frost, 2014; Charters & Mitchell, 2011). The idea of the territorial brand captures how a place can be translated into a coherent communicative identity through wine and related local products, provided that local history, landscape and product communication are aligned rather than fragmented (Charters & Mitchell, 2011; Charters & Spielmann, 2014; Alameda García et al., 2024). Heritage studies add that heritage is not a fixed stock of the past, but a selective, present-oriented process in which elements of history are codified, authorized and mobilized for contemporary purposes (Bessière, 1998; Hafstein, 2009; Smith, 2006). In wine regions shaped by migration, family narratives and intergenerational practices often combine continuity and reconstruction, authenticity claims and strategic repositioning (Hobsbawm, 1983; Sanfilippo, 2009; De Majo & Peruchi Moretto, 2021).

This article brings these strands together by asking how Italian-Brazilian wine heritage is communicated and mobilized in the territorial branding of Brazilian sparkling wine. Focusing on the Altos de Pinto Bandeira Denominação de Origem and the Wines of Brazil export program, it examines how origin narratives, institutional recognition and product positioning interact in producers’ and institutions’ public communication. Rather than treating heritage as an economic input with automatic market returns, the article conceptualizes it as a communicative and territorial resource whose value depends on strategic fit: the degree to which heritage narratives align with the sensory and symbolic logic of sparkling wine and with the broader identity that Brazilian wine seeks to project (Barca, 2009; Paasi, 2010; Porter, 1998).

To this end, the study develops a five-dimension framework for analyzing wine heritage – time depth, continuity, recognition, valorization and strategic fit – and applies it to five wineries licensed under the Altos de Pinto Bandeira DO and to the Wines of Brazil program, treated as a meta-level branding platform (Bessière, 1998; Hafstein, 2009; Smith, 2006; Wines of Brazil, n.d.). The analysis shows that heritage becomes most communicatively effective when it is narratively and institutionally aligned with sparkling-wine specialization and with a festive, contemporary image of Brazilianness, and less so when it remains generic, fragmented or weakly tied to the DO framework. In doing so, the article contributes to debates on wine heritage, place branding and regional identity by illustrating how a rural and wine-based territory can use heritage to build a distinctive territorial brand in an emerging New World context (Charters & Mitchell, 2011; Paasi, 2010; Alameda García et al., 2024).

2. Literature Review

2.1. *Wine Heritage Beyond Authenticity*

Heritage studies emphasize that heritage is not a neutral label attached to objectively old objects or practices, but the outcome of selective processes through which particular pasts are codified, authorized and mobilized in the present (Bessière, 1998; Hafstein, 2009; Smith, 2006). Hobsbawm's (1983) notion of "invented traditions" complicates the opposition between authentic continuity and fabrication by showing that many practices presented as time-honored are of relatively recent origin, constructed to legitimize institutions and identities under new historical conditions (Hobsbawm, 1983).

Applied to agri-food and wine, this perspective shifts attention from essentialist notions of terroir to the institutional and narrative processes through which certain products and territories are stabilized as carriers of tradition (Bessière, 1998; Smith, 2006). Research on Italian migration and rural transformation in southern Brazil shows how migrant communities selectively retained, adapted and sometimes reinvented viticultural practices and family narratives to fit new environments and markets (Sanfilippo, 2009; De Majo & Peruchi Moretto, 2021). In this literature, heritage appears as a dynamic resource whose relevance depends on how convincingly it is embedded in broader territorial and development strategies, not just on its historical depth.

The next section operationalizes this processual view of heritage into five analytical dimensions for empirical assessment.

2.2. *Regions, Clusters and Place-Based Development*

Regional-development research highlights that regions are socially produced entities institutionalized through narratives, symbols, boundaries and organizations, rather than pre-given containers (Paasi, 1986, 2002, 2010). Paasi's framework shows how regional identities emerge through intertwined processes of territorial delimitation, symbolic representation and organizational consolidation, offering a lens for understanding how wine territories become recognizable "regions" in policy and market arenas.

Within economic geography, Barca's (2009) place-based approach argues that development strategies are most effective when they mobilize territorially specific assets—material and immaterial—rather than applying generic policy templates, while Porter's (1998) cluster perspective underlines the importance of localized networks, shared reputations and specialized product focuses in sustaining competitiveness (Barca, 2009; Porter, 1998). Geographical indications (GIs) and denominations of origin can be seen as institutional devices that codify these place-based resources, setting rules on origin and production methods while signaling collective reputation to markets. In Brazil, the creation of Vale dos Vinhedos as the country's first wine GI in 2002 and its upgrade to Denominação de Origem in 2012 are widely interpreted as milestones that catalyzed quality-oriented strategies, new forms of "coopetition" among wineries and more explicit territorial branding of Brazilian wine regions (Empresa Brasileira de Pesquisa Agropecuária [Embrapa], n.d.).

2.3. *Brazilian Wine, New World Identity and Sparkling Specialization*

Building on analyses of Old and New World wine differentiation and the role of varietal and regional typicality (e.g., Jackson, 2014; Johnson & Robinson, 1994), the Brazilian wine sector can be seen as one of several New World producers negotiating authenticity vis-à-vis European benchmarks. Serra Gaúcha, in particular, is portrayed as a pioneering region where Italian immigration, challenging agro-ecological conditions and institutional innovation have produced a distinctive but internally heterogeneous wine landscape (De Majo & Peruchi Moretto, 2021).

Studies and sectoral reports highlight the consolidation of GIs such as Vale dos Vinhedos and Altos de Pinto Bandeira as key steps in Brazil's shift from hybrid-grape table wines toward quality-oriented production and territorial branding, while also noting persistent challenges

including low per-capita consumption, a dual production system and perceptions of wine as expensive and formal (Decanter, 2023; Empresa Brasileira de Pesquisa Agropecuária [Embrapa], n.d.; Muriel Wines, 2018; USDA Foreign Agricultural Service, 2010). At the same time, recent analyses underline robust domestic growth and the particular dynamism of sparkling wine, which has become central to export promotion and to the "de-exceptionalization" of wine consumption (Grand View Research, 2024; Salvo, 2025; Sommeliers Choice Awards, 2024; WineNews, 2024; Wines of Brazil, n.d.).

Within this literature, two gaps are particularly relevant. First, while Brazilian sparkling wines and GIs have been discussed in terms of quality improvements and international recognition, less attention has been paid to how migration-based heritage narratives are articulated, codified and strategically deployed by different types of producers within these institutional frameworks (De Majo & Peruchi Moretto, 2021). Second, existing analyses of Wines of Brazil and related export initiatives tend to treat national branding as a homogeneous promotional effort rather than as a specific heritage strategy that may or may not align with firm-level narratives and regional identities (Gambero Rosso International, 2023; Sommeliers Choice Awards, 2024; Wines of Brazil, n.d.). By focusing on Altos de Pinto Bandeira and Wines of Brazil as nested cases, this article addresses these gaps by systematizing wine heritage into analytically distinct dimensions and examining how different combinations of these dimensions interact with national branding to shape the communicative positioning and competitive distinctiveness of Brazilian sparkling wines.

3. Theory and Analytical Framework

3.1. Wine Heritage as Process Rather Than Essence

This article adopts a processual view of wine heritage consistent with critical heritage studies and regional institutionalization theory. Heritage is treated not as an intrinsic property of vineyards, family names or landscapes, but as the outcome of social processes that select, codify and valorize particular pasts in the present (Bessière, 1998; Hafstein, 2009; Smith, 2006; Paasi, 1986, 2002, 2010). In wine regions, such processes involve stories of migrant settlement, family continuity, inherited know-how, local rituals and emblematic grape varieties, which help stabilize particular images of the territory and designate certain actors and histories as emblematic (Sanfilippo, 2009; De Majo & Peruchi Moretto, 2021).

From a place-based and cluster-oriented perspective, these territorially embedded symbols can become productive resources when translated into reputational advantage, product differentiation, tourism appeal and broader territorial branding (Barca, 2009; Porter, 1998). Building on this view, the following subsection specifies five dimensions through which wine heritage can be assessed as a communicative and territorial resource with economic implications.

3.2. Five Dimensions of Heritagization

To analyze how wine becomes operative heritage, the article proposes five analytical dimensions of "heritagization", i.e. the process through which elements of the past are transformed into recognized and valorized heritage (Bessière, 1998; Hafstein, 2009; Smith, 2006).

1. **Time depth** refers to the chronological span of the practice, family, winery or settlement invoked in heritage claims. This dimension concerns how far back the narrative reaches, from nineteenth-century migration to more recent founding histories (Sanfilippo, 2009; De Majo & Peruchi Moretto, 2021).
2. **Continuity** concerns the extent to which there has been intergenerational transmission of practices, identities or organizational forms. A winery may invoke a century-old lineage even when production has been interrupted, relocated or substantially transformed; conversely, relatively young enterprises may inherit and continue regional practices developed over longer periods (Hobsbawm, 1983; De Majo & Peruchi Moretto, 2021).

3. **Recognition** denotes the degree to which a heritage claim is validated by relevant institutions and communities, including denominations of origin, sectoral organizations, museums, tourism authorities and local publics. Institutional acts such as the creation of a denomination of origin or the inclusion of certain histories in museums and official narratives are particularly important mechanisms of recognition (Paasi, 1986, 2010; Tófoli, 2023).
4. **Valorization** refers to the mobilization of heritage through branding, tourism, pricing, export promotion and regional marketing (Bessière, 1998). This dimension captures whether heritage is used actively to support product differentiation and attract visitors.
5. **Strategic fit** refers to the degree of alignment between the heritage claim, the product category and the wider territorial identity that producers and institutions seek to project. This dimension links heritage studies to place-based and cluster perspectives by asking whether a given heritage narrative fits the sensory, symbolic and market logic of the product used to embody it (Barca, 2009; Porter, 1998).

3.3. Strategic Fit Between Heritage, Territory and Product

The concept of strategic fit bridges critical heritage studies and work on territorial development and wine economics. Heritage scholarship explains how traditions are selected, codified and authorized (Bessière, 1998; Hafstein, 2009; Hobsbawm, 1983; Smith, 2006), while place-based and cluster theories explain how territorially specific resources can support competitive development and shared regional reputations (Barca, 2009; Porter, 1998; Paasi, 2010). Strategic fit refers to the coherence between three elements: the historical narrative mobilized by producers, the symbolic identity of the territory, and the product category used to materialize that identity in the market.

In Brazilian wine regions, Italian migration heritage provides one layer of legitimacy. It offers a story of origin, labor, settlement and technical transmission that anchors viticulture in a recognizable historical trajectory (Sanfilippo, 2009; De Majo & Peruchi Moretto, 2021). Yet producers operate in a market where national differentiation also matters, and contemporary representations of Brazilianness often emphasize celebration, conviviality and a relaxed lifestyle. These associations align more readily with sparkling wine (strongly linked to festive occasions) than with many of the prestige codes associated with classic European still wines (Barca, 2009; Porter, 1998). At the same time, sparkling wine is the category in which Brazil has achieved the clearest institutional recognition and international visibility, as illustrated by the denomination of origin for Altos de Pinto Bandeira and the emphasis on sparkling wines in national promotion strategies (Decanter, 2023; Tófoli, 2023; Wines of Brazil, n.d.).

This alignment suggests that the key analytical question is not whether traditions invoked by Brazilian wineries are entirely authentic or partly invented, but whether inherited and reconstructed elements are combined in a way that is convincing, institutionally supported and strategically appropriate for the product category and territorial project at hand (Hobsbawm, 1983; Paasi, 2010; Smith, 2006). Invented traditions, in this sense, are not simply distortions of the past; they can be communicatively effective and potentially economically advantageous when they stabilize identities, organize expectations and provide symbolic coherence within a place-based development strategy (Hobsbawm, 1983; Barca, 2009).

3.4. Typology of Heritage Strategies

On the basis of these five dimensions, the article proposes a typology of heritage strategies for wineries and regional narratives in Brazil and other emerging wine regions.

- Inherited-fit heritage: claims with substantial time depth and continuity, strong institutional and community recognition, active valorization, and high strategic fit with the product category.
- Reactivated-fit heritage: claims rooted in historical trajectories that were partially interrupted or transformed, later reactivated and aligned with a coherent market strategy.

- Strategic heritage: claims with selective historical anchoring, moderate continuity and strong valorization, used primarily for differentiation and often highlighting particular episodes (such as early migrant settlement) more than others.
- Misaligned heritage: claims with historical depth or prestige aspirations but weak fit with the product category or contemporary territorial identity, resulting in limited communicative and competitive effect.
- Invented-fit heritage: reconstructed traditions with limited or recent continuity but strong recognition, valorization and strategic fit, capable of generating symbolic value and, potentially, economic benefits despite their relatively recent codification (Hobsbawm, 1983; Smith, 2006).

This typology moves beyond a simple authentic/inauthentic opposition. It clarifies how different combinations of time depth, continuity, recognition, valorization and strategic fit shape the territorial and communicative effects of heritage claims, and how these may translate into economic outcomes in future, quantitatively oriented research (Bessière, 1998; Hafstein, 2009).

3.5. Propositions

Guided by this framework, the empirical analysis is structured around five propositions.

- P1: Time depth alone is insufficient for wine heritage to become operative in territorial branding; institutional and collective recognition and active valorization are also required (Bessière, 1998; Hafstein, 2009; Smith, 2006).
- P2: In Brazilian wine regions shaped by Italian migration, heritage claims frequently combine inherited and reconstructed elements rather than representing pure continuity (Hobsbawm, 1983; Sanfilippo, 2009; De Majo & Peruchi Moretto, 2021).
- P3: Heritage generates stronger competitive value when it aligns with both territorial identity and product category, reflecting a high degree of strategic fit (Barca, 2009; Porter, 1998).
- P4: In Brazil, sparkling wine offers stronger strategic fit than still wine for the joint mobilization of Italian-Brazilian heritage and contemporary national identity, given its symbolic association with festivity and institutional recognition (Decanter, 2023; Tófoli, 2023; Wines of Brazil, n.d.).
- P5: Regional institutions reinforce this fit when they codify and promote sparkling wine as a territorial flagship, as seen in the denomination of origin for Altos de Pinto Bandeira and related policy and marketing initiatives (Barca, 2009; Decanter, 2023; Tófoli, 2023).

4. Methodology

4.1. Study Area

This study examines territorial branding in Brazil's premier wine region, Serra Gaúcha, focusing on the adjacent territories of Vale dos Vinhedos and Altos de Pinto Bandeira. Situated on a humid, basaltic highland at 300–850 meters, these areas integrate Italian immigration heritage, terroir narratives and regulatory innovations. Vale dos Vinhedos, a 72-km² zone, became Brazil's first wine geographical indication in 2002 and a Denominação de Origem (DO) in 2012, with rules on origin and practices that foster more explicit territorial branding (Empresa Brasileira de Pesquisa Agropecuária [Embrapa], n.d.). In contrast, Altos de Pinto Bandeira achieved DO status in 2022 as the first New World designation devoted exclusively to traditional-method sparkling wines (Decanter, 2023). Located on a 600-meter plateau, it enforces strict yield limits, mandatory bottle fermentation and a restricted set of grape varieties for its five licensed wineries (Decanter, 2023). Together, these DO frameworks show how heritage codification and sparkling specialization underpin the construction of Brazil's wine territorial brands.

4.2. Research Design and Case Selection

This study adopts a nested multiple case study design centered on the Altos de Pinto Bandeira Denominação de Origem and the Wines of Brazil export program. Altos de Pinto Bandeira is treated

as a regional case, with DO-licensed wineries as embedded units of analysis, while Wines of Brazil functions as a national meta-case representing the official branding of Brazilian wine.

Five wineries licensed to use the Altos de Pinto Bandeira DO seal were identified from the official DO website and confirmed against the wineries page of the same site:

- Cooperativa Vinícola Aurora (Bento Gonçalves / Pinto Bandeira)
- Vinícola e Pousada Don Giovanni (Pinto Bandeira)
- Família Geisse / Cave Geisse (Pinto Bandeira)
- Vinícola Valmarino (Pinto Bandeira)
- Vinícola Terraças (Pinto Bandeira)

These producers include four family-owned wineries and one cooperative, all located within the DO's delimited area and authorized to produce traditional-method sparkling wines under its regulations.

A sixth winery (Berkano Premium Wines) appears in some secondary sources but is not listed as a DO-licensed producer on the official Altos de Pinto Bandeira website; it has been excluded from the core analysis to maintain consistency with the regulatory licensing framework. The original DO certification process (completed in November 2022) initially named four licensed wineries—Aurora, Don Giovanni, Geisse and Valmarino—as reported in international wine press (Decanter, 2023). Terraças was subsequently added as the fifth DO participant, as confirmed on the official DO website's wineries section and in event materials; this discrepancy between earlier press reports and the current official listing is noted in the limitations subsection.

The national meta-case is Wines of Brazil (Wines of Brazil, n.d.), the sectoral export promotion project executed by Consevitis-RS in partnership with ApexBrasil, the Brazilian Trade and Investment Promotion Agency. Wines of Brazil was selected because it is the main platform through which Brazilian wine is collectively branded abroad and because its communication explicitly emphasizes sparkling wine as a national “calling card.”

This nested design allows comparison across organizational types (family wineries, a cooperative and a national branding program) while keeping the product category (traditional-method sparkling wines) and territorial reference (Serra Gaúcha) constant. It is therefore well suited to exploring how different heritage strategies operate within a shared regulatory and symbolic framework.

4.3. Unit of Analysis

The primary units of analysis are:

- The five DO-licensed wineries in Altos de Pinto Bandeira
- The Wines of Brazil program as a collective national branding actor

For each unit, the analysis focuses on official, public-facing communication (websites and institutional documents) that articulate heritage narratives, product positioning and territorial identity.

4.4. Data Sources

Data were collected from primary online sources between January and May 2026, following a systematic protocol for each unit of analysis.

For the five DO producers:

- Official winery websites were consulted, and textual content was extracted from history/about pages, product pages and homepage banners.
- The Altos de Pinto Bandeira DO official homepage was used to obtain production rules, permitted varieties, geographic delimitation and the list of participating wineries.

For the Wines of Brazil program:

- The official website (winesofbrazil.com.br) was examined, including homepage branding content, the directory of associated wineries and the program's purpose statement.
- Coding conventions for this dataset:
- Origin migration dates are cited as the year of the founding patriarch's arrival in Brazil, as stated on producer websites.
 - Founding dates for the modern winery entity are treated separately from ancestral migration dates.
 - "Heritage narrative intensity" is assessed as the explicitness and prominence of family/migration history on the producer's official digital presence.

4.5. Coding Scheme and Analytical Procedure

Each of the five DO wineries was coded along the five heritage dimensions using a three-level ordinal scale (low = 1, moderate = 2, high = 3), supplemented by qualitative annotations.

Dimension 1: Time depth

Definition: Temporal distance of the founding event or ancestral migration that serves as the origin claim.

Coding rubric:

- High (3): Ancestral migration predates 1885 (early Italian immigration wave to Serra Gaúcha).
- Moderate (2): Ancestral migration or founding dated 1885–1930.
- Low (1): Founding event post-1930; no explicit ancestral claim predating 1880.

Dimension 2: Continuity

Definition: Number of generations and/or explicit lineage claimed between the ancestral origin and the current production entity.

Coding rubric:

- High (3): Three or more generations explicitly named or referenced in official communication.
- Moderate (2): Two generations; continuity implied but not elaborated in detail.
- Low (1): Single-generation founding; no explicit intergenerational narrative.

Dimension 3: Recognition

Definition: Institutional and market-level recognition, including DO licensing, awards and participation in collective promotional platforms.

Coding rubric:

- High (3): DO-licensed plus member of Wines of Brazil associated wineries and documented competition awards.
- Moderate (2): DO-licensed but with limited evidence of broader institutional affiliation.
- Low (1): Not DO-licensed, or DO-licensed with minimal external validation.

Dimension 4: Valorization

Definition: Active deployment of heritage as a value proposition (premiumization, brand storytelling, enotourism, experiential offerings).

Coding rubric:

- High (3): Explicit heritage narrative on homepage/about page plus dedicated tourism offerings and a premium product line named after heritage.
- Moderate (2): Heritage mentioned but not central to communication; some tourism or experiential elements.
- Low (1): Heritage minimally referenced; product and terroir emphasized over ancestry.

Dimension 5: Strategic fit

Definition: Alignment between heritage narrative and product category (particularly sparkling wine), and between firm-level heritage claims and the national branding program.

Coding rubric:

- High (3): Heritage narrative directly supports sparkling-wine positioning; brand values congruent with Wines of Brazil's "festas e celebrações" framing.
- Moderate (2): Heritage supports general wine identity but not specifically sparkling positioning; partial alignment with national branding.
- Low (1): Heritage narrative focuses on still wine, grape juice or generic cooperative identity; weak alignment with national sparkling-wine branding.

Cases were classified as inherited-fit, reactivated-fit, strategic, invented-fit or misaligned according to their combined scores on time depth, continuity, recognition, valorization and strategic fit. Qualitative notes from the websites were used to interpret borderline cases and to illustrate each type with concrete narrative patterns.

4.5. Limitations

The study relies on official digital communication and DO documentation, which capture institutionalized and curated heritage narratives rather than everyday practices or consumer perceptions. The focus on Altos de Pinto Bandeira and Wines of Brazil allows detailed comparison within a clearly defined regulatory and branding context, but limits the generalizability of findings to other Brazilian wine regions and to still-wine producers. Future research could complement this approach with interviews, ethnographic observation and consumer studies to triangulate how heritage is constructed, received and contested across different audiences.

Accordingly, the findings should be interpreted as exploratory and communicative in scope rather than as providing direct evidence on price formation, export performance or other quantitative economic outcomes

5. Results

Section 5 applies the five-dimension framework (time depth, continuity, recognition, valorization, strategic fit) to the five DO wineries and to Wines of Brazil, and assigns each case to one of the heritage strategy types introduced in section 3.4.

5.1. Producer-Level Coding Matrix

Table 1 presents the coding results for all five Altos de Pinto Bandeira D.O. producers across the five heritage dimensions.

Table 1. Coding results.

Producer	Time Depth	Continuity	Recognition	Valorization	Strategic Fit	Typology
Aurora	3 (High)	2 (Moderate)	3 (High)	2 (Moderate)	2 (Moderate)	Strategic
Don Giovanni	2 (Moderate)	3 (High)	2 (Moderate)	3 (High)	3 (High)	Inherited-fit
Geisse	2 (Moderate)	2 (Moderate)	3 (High)	3 (High)	3 (High)	Inherited-fit / Strategic hybrid
Valmarino	3 (High)	3 (High)	2 (Moderate)	2 (Moderate)	3 (High)	Inherited-fit
Terraças	3 (High)	2 (Moderate)	1 (Low)	2 (Moderate)	2 (Moderate)	Reactivated-fit
Wines of Brazil (meta- case)	N/A	N/A	3 (High)	3 (High)	2 (Moderate)	Strategic

5.2. Micro-cases

Case 1: Cooperativa Vinícola Aurora – Strategic heritage

Aurora's heritage narrative originates in the 1875 arrival of Italian immigrant families in Bento Gonçalves and the founding of the cooperative by 16 families in 1931. This high time depth anchors Aurora in the earliest regional migration, while continuity is moderate because the narrative emphasizes 90 years of collective institution-building rather than an ancestral family lineage. In its public communication, strong institutional recognition as a licensed Denominação de Origem producer featured by Wines of Brazil is balanced by moderate valorization, as heritage storytelling shares digital space with corporate governance and environmental, social and governance reporting. Aurora's strategic fit is moderate: its diversified portfolio means heritage communication supports institutional legitimacy more than explicitly positioning sparkling wine as a genealogical product, resulting in only partial alignment with the national promotional framing. Overall, Aurora illustrates strategic heritage with moderate strategic fit, showing how cooperative structures deploy history for institutional positioning rather than ancestral intimacy.

Case 2: Vinícola e Pousada Don Giovanni – Inherited-fit heritage

Don Giovanni's narrative centers on a multi-generational family estate currently represented by its fourth generation, establishing high continuity through an explicit ancestral lineage central to the winery's identity. Time depth is moderate, as no migration date prior to 1885 is specified, but the family's historic roots in regional viticulture are clear. Public communication shows high valorization and strategic fit: heritage is heavily integrated through a dedicated history-and-tradition section and an extensive enotourism ecosystem combining winery, pousada and restaurant. Around 80 percent of production is dedicated to traditional-method and Asti sparkling wines, allowing certified products to directly reinforce local terroir and ancestral identity. Institutional recognition is moderate, since the winery is licensed under the DO and participates in national programs but is less visible in major national listings. Don Giovanni exemplifies inherited-fit heritage, where family lineage and sparkling-wine specialization are tightly mutually reinforcing.

Case 3: Família Geisse / Cave Geisse – Inherited-fit / Strategic hybrid heritage

Founded in 1979 by Mario Geisse, a Chilean-born oenologist of Italian descent, Geisse exhibits moderate time depth and continuity: its ancestral roots predate 1885, but the commercial estate belongs to the modern era and is currently managed across two generations. In public communication, Geisse enjoys high recognition as a prominent DO-licensed producer frequently featured in masterclasses and collective branding activities. The brand achieves high valorization and exceptional strategic fit by centring its narrative on technical expertise, enotourism and a rigorous terroir concept. Since its inception Geisse has been dedicated exclusively to traditional-method sparkling wines, predating the regional certification by more than four decades, and is framed as a pioneer whose deliberate placement strategy aligns closely with the current regulatory framework. Geisse thus occupies an inherited-fit/strategic hybrid position, showing how ancestral Italian lineage and calculated place-based specialization can jointly construct market legitimacy.

Case 4: Vinícola Valmarino – Inherited-fit heritage

Valmarino demonstrates high time depth and continuity, founded in 1997 by third-generation vintner Orval Salton and his three sons, who trace their lineage back to an 1878 immigrant arrival from Treviso, Italy. This specific toponymic connection anchors the brand in a verifiable historical geography rather than a generic identity. Public communication shows moderate valorization: ancestral storytelling appears in a website sidebar emphasizing intergenerational transmission, without a large enotourism ecosystem. Institutional recognition is moderate for this boutique producer, which holds a DO licence for its premium Blanc de Noir sparkling wine but does not prominently showcase national associations online. Strategic fit is high because traditional-method sparkling production is tightly aligned with DO requirements. Valmarino represents inherited-fit heritage, using geographically precise ancestral roots to validate a specialized sparkling portfolio.

Case 5: Vinícola Terraças – Reactivated-fit heritage

Terraças combines high time depth with moderate continuity: the Fornasier family reports grape cultivation since 1880, but the narrative highlights generational reactivation rather than uninterrupted practice. The family shifted from bulk grape juice to launching a commercial winery in 2005, later expanded by the second generation after formal international oenology training. Public communication reflects moderate valorization, with a brand-philosophy section and a visual timeline from 1880 to 2024 framing the recent 2022 move into sparkling wines as an evolution of ancestral knowledge. Institutional recognition is low, constrained by boutique scale and limited evidence of major awards or national promotion. Strategic fit is moderate because the brand champions a broad viticultural identity spanning juice and still wines rather than focusing communication exclusively on sparkling. Terraças represents the reactivated-fit heritage type, exemplifying how deep historical roots are selectively activated to support modern, certified sparkling-wine production.

Case 6 (Meta-case): Wines of Brazil – Strategic heritage at the national level

Wines of Brazil serves as a national-level meta-case that interacts structurally with the five DO producers. Its core slogans, “Descubra um Novo Lado do Brasil” and “Brasil, terra dos vinhos e espumantes”, tie Brazilian sparkling wine to a global cultural frame of “festas e celebrações”, framing the product as a symbol of conviviality rather than a niche luxury. Governed by a public-private partnership between Consevitis-RS and ApexBrasil, the program deploys a collective territorial brand rather than single-family ancestry. While its primary export mandate targets external audiences, the domestic reception of this narrative warrants separate analysis.

Regarding its dimensional profile, the program scores N/A on time depth and continuity, high on recognition and valorization, and moderate on strategic fit with the sparkling-DO frame, as it promotes all Brazilian wine but visibly prioritizes sparkling. Typologically, Wines of Brazil represents a strategic-heritage case: the program institutionally mobilizes Serra Gaúcha’s Italian migration history as a collective national resource, intentionally leveraging the global cultural recognition of sparkling wine through a deliberately crafted market positioning.

5.3. Cross-Case Synthesis

The five DO producers display a clear gradient of heritage typologies that maps onto their institutional maturity, generational depth, and sparkling-wine focus. Aurora represents the institutional end of the spectrum – a cooperative whose heritage is collective and historically documented but whose brand architecture encompasses multiple product categories beyond sparkling wine. At the other end, Don Giovanni and Geisse represent the family-estate model where multi-generational continuity and sparkling-wine specialization are mutually reinforcing. Valmarino occupies an intermediate position, with deep ancestry but a broader product range. Terraças completes the spectrum as the most recent entrant, whose heritage is being reactivated through the second generation’s formalization and DO participation.

The Wines of Brazil meta-case operates above this spectrum as a strategic-heritage frame that aggregates individual producers under a collective national identity. The programme’s slogan – “Brasil, terra dos vinhos e espumantes” – implicitly subsumes the Italian migration narrative of the Serra Gaúcha into a national-level claim, which raises a productive tension: the family-level heritage narratives (specific, genealogical, rooted in particular Italian localities like Cison di Valmarino) coexist with, and may be partially obscured by, a generic national branding (‘Brasil, Terra dos Vinhos e Espumantes’) that elides the particularity of migration histories in favor of a more portable, export-oriented message, and may weaken strategic fit when not anchored in specific regional narratives.

This tension – between specific ancestral claims and generic national branding – is central to the discussion of heritage legitimacy and strategic deployment in the next section.

6. Discussion

6.1. *Heritage as Strategic Fit: Why Sparkling Wine Matters*

The empirical analysis of the five Altos de Pinto Bandeira DO producers reveals a consistent pattern: wineries whose heritage narratives align closely with the sparkling-wine category (Don Giovanni, Geisse, Valmarino) achieve higher valorization and strategic-fit scores than those whose heritage is institutionally broader or less product-specific (Aurora, Terraças). This supports the central argument of the study: heritage becomes most communicatively and strategically effective when it exhibits strong fit with the product category it serves, rather than functioning as a generic claim. From a wine-economics perspective, this invites the hypothesis that heritage effects on prices, margins or export performance will be strongest where such strategic fit is present, but testing this would require complementary quantitative data beyond the scope of this article.

This finding has implications for the literature on “invented traditions” in territorial development. Hobsbawm (1983) concept has often been read as a critique of heritage construction, implying that invented traditions are inauthentic and therefore fragile. The Brazilian case suggests a more nuanced interpretation. Terraças, for example, was founded in 2005 but invokes an ancestral arrival date of 1880; the Fornasier family’s historical presence is real, yet its deployment as a sparkling-wine narrative is a recent, deliberate act. From a strategic and communicative perspective, what matters is not the chronological authenticity of the heritage claim, but its coherence with the product and territorial identity, which can in turn shape economic performance. The strategic-fit framework accommodates this without forcing a purity/authenticity binary, recognizing that inherited and reconstructed elements can both generate value when they align with a coherent product strategy.

6.2. *The DO as Heritage Infrastructure*

The Altos de Pinto Bandeira DO functions not only as a regulatory seal but also as heritage infrastructure—an institutional mechanism that certifies, standardizes and territorializes heritage claims. Its strict rules on origin, varieties, yields and traditional-method production (outlined in Section 4.1) create a material and symbolic framework within which heritage narratives acquire regulatory legitimacy.

DOs that combine production rules (material infrastructure) with collective branding and heritage narratives (symbolic infrastructure)—as Altos de Pinto Bandeira does—create more resilient territorial assets than schemes that certify only production methods. The DO crystallizes a shared heritage frame for diverse producers while leaving room for differentiated brand-level narratives, thereby anchoring individual strategies in a collectively recognized territorial project.

6.3. *Domestic Market Expansion: Normalizing Wine Consumption Through Sparkling*

While the Wines of Brazil program primarily emphasizes export promotion due to historically low domestic per-capita consumption (USDA Foreign Agricultural Service, 2010), heritage deployment and sparkling-wine specialization can also catalyze internal growth. In Brazil, wine has traditionally been perceived as an elite, expensive status marker reserved for formal occasions rather than a routine beverage, an association reinforced by information asymmetries (Gambero Rosso International, 2023; Muriel Wines, 2018; Salvo, 2025). However, recent data reveal an expanding domestic market where consumers increasingly favor lighter, fresher and “uncomplicated” wine profiles (Grand View Research, 2024; WineNews, 2024). In Brazil’s warm climate, chilled sparkling wines are well suited to “de-exceptionalize” consumption and reposition wine within more informal social contexts (Jackson, 2014; Jones et al., 2005). Linking regional Italian-Brazilian heritage with sparkling-wine specialization—supported by consumer education and diversified pricing—can help dismantle elitist perceptions (Muriel Wines, 2018; Salvo, 2025). Consequently, aligning heritage,

territorial identity and product category around sparkling wines can support both external differentiation and domestic market expansion.

6.4. Heritage Legitimacy and the Specific–Generic Tension

A recurring theme across the five micro-cases is the tension between specific ancestral claims and the generic national branding deployed by Wines of Brazil. Case-specific narratives—such as Valmarino’s Treviso roots, Geisse’s targeted 1979 migration and Aurora’s 1875 cooperative origins—are highly localized and historically traceable. Conversely, the national slogan “Brasil, terra dos vinhos e espumantes” abstracts these histories into a geographically unspecific frame. This raises a legitimacy question: does the generic framework broaden the reach of heritage claims for international consumers, or does it dilute the credibility provided by regional specificity?

The five-dimension coding suggests that these levels are not mutually exclusive but hierarchically nested. Producers with an inherited-fit profile (Don Giovanni, Geisse, Valmarino) maintain specific claims while operating within the generic platform. Aurora leverages institutional history to substitute for limited genealogical detail, while Terraças relies primarily on the DO seal. This gradient indicates that the DO provides the strict territorial anchor, Wines of Brazil offers a national frame for global legibility and individual histories supply brand-level differentiation. When aligned around a shared product specialization such as sparkling wine, these three tiers coexist productively; when misaligned, they generate strategic friction and weaken fit.

6.5. Comparative Implications for Other New World Territories

Finally, the Altos de Pinto Bandeira case offers a template for comparative analysis with other New World wine regions seeking DO certification and heritage-based differentiation. The key transferable insight is that heritage deployment is most strategically effective when it satisfies five conditions: (1) traceable time depth linked to the territory’s founding; (2) documented continuity across generations or institutional phases; (3) institutional recognition through certified territorial labels; (4) active valorization through digital communication, branding and enotourism; and (5) strong strategic fit between the heritage narrative and the core product category.

Other emerging wine territories—whether in Latin America, Oceania or Eastern Europe—face similar challenges of differentiating themselves from established Old World producers while negotiating complex histories of migration and institutional change. The framework developed here suggests that debates over authenticity and invention should be reframed around questions of strategic coherence: how different combinations of inherited and constructed heritage elements interact with regulatory regimes, cluster structures and market positioning to generate (or fail to generate) durable competitive advantages. Comparative work applying this framework to other regions would help clarify whether the Brazilian sparkling-centered model represents a broader pathway for New World wine economies seeking to combine heritage, territorial identity and product specialization

7. Conclusions

This study applied a five-dimension methodology to analyze wine heritage as a communicative and territorial resource, using Brazil’s Altos de Pinto Bandeira DO and the Wines of Brazil program as empirical anchors. The findings show that heritage is a heterogeneous asset. Don Giovanni, Geisse and Valmarino exemplify inherited-fit heritage, where ancestry and sparkling-wine focus are mutually reinforcing, while Aurora leverages strategic heritage by foregrounding institutional history over genealogy and Terraças illustrates reactivated-fit heritage, legitimizing recent entry through ancestral reactivation. The Wines of Brazil program aggregates these diverse profiles under a collective national framework.

The research advances two main theoretical contributions. First, heritage value depends on its strategic fit with the product category. The DO’s exclusive sparkling-wine focus rewards narratives

that support this specialization, whether inherited or deliberately constructed, shifting the “invented traditions” debate from authenticity to functional efficacy for the territory. Second, the DO functions as heritage infrastructure: an institutional mechanism that certifies and territorializes heritage claims, giving them material and symbolic weight within territorial branding and development strategies. The analysis also points to a domestic-market catalyst effect in emerging wine regions, where linking regional migration histories with celebratory product framing can help normalize wine consumption.

While limited by its reliance on public digital communication, evolving regulatory counts and a single-coder framework, the methodology offers a structured, transferable template. It bridges qualitative heritage studies and more quantitative approaches to wine economics and territorial governance by operationalizing dimensions such as time depth, continuity, recognition, valorization and strategic fit. For policymakers, the findings suggest that GI and DO investments are most effective when heritage narratives, regulatory frameworks and product specialization are aligned. For wineries, heritage storytelling is strategically meaningful not per se, but when it supports a coherent product and territorial strategy that can also underpin stronger market performance.

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