

# Wines of Brazil: From the past to the future

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**Abstract.** How was the wine industry born in Brazil? What were the most striking facts of the 20th century? What was the nature of the relationship between the wine cooperatives and the wine industry? What were the impacts on the Brazilian market of the entry and exit of multinationals companies? What are the strategies of the Brazilian wines companies that were established essentially after the departure of the multinationals, when it was necessary to face the high cost of the Brazilian production and the strong competition of the imported wines? This research aims to present a panorama of the development of the wine industry in Brazil through the testimony of descendants of Italian immigrants who settled in the Serra Gaúcha at the end of the 19th century to devote themselves to vitiviniculture. To this end, we used the methodology of oral history, which involved, in the first place, a consistent and extensive research on the subject to be treated. To this end, we carried out historical and documentary interviews which made it possible to construct a representative panel and gave rise to an excellent tool for reflection.

## 1. Introduction

In the final decades of the nineteenth century a strong migratory current left the north of Italy for Brazil. The majority settled in São Paulo. However, between 1875 and 1894 a large number went to colonize the Serra Gaúcha mountain range in Rio Grande do Sul, where over 60,000 Italians established themselves. They purchased colonial lots where to survive they practiced subsistence agriculture with primary foodstuffs, such as corn, potatoes, and beans, as well as raising domestic animals such as goats, pigs, cows, and mules, amongst others.

By 1879 they were already making the first wine in the Italian colony. This activity soon came to be the one to which the colonists devoted most efforts because it produced the best results. The possibility of practicing vitiviniculture was an important and decisive factor in the decision of Italian immigrants to settle in the Serra Gaúcha.

1886 records show that some immigrants in Campo dos Bugres (Caxias do Sul) had imported and planted European varieties of grape such as *Barbera*, *Trebbiano*, *Traminer*, *Vernaccia*, starting a movement which would strongly contribute to the development of the nascent Brazilian vitiviniculture.

Among the colonies established, Conde d'Eu (Garibaldi), Dona Isabel (Bento Gonçalves), and Campo dos Bugres (Caxias do Sul) are most noteworthy, due to their decisive importance in the development of vitiviniculture in what would be transformed into the most important Brazilian winegrowing region.

### The first Brazilian wineries, cooperatives, and the important crises of the sector

Grape production expanded, generating excess which permitted commercial exchanges between neighbors and traders. By the beginning of the twentieth century

some families were able to commercially undertake vitiviniculture. Some examples are Carlos Dreher Filho & Cia (1908), Paulo Salton & Irmãos (1910), and Armando Peterlongo (1913).

In parallel, in 1911–13 there occurred the first attempt to create a cooperative movement, when under the leadership of Stefano Paternó various cooperatives were created and disappeared. In 1929, at the peak of one of the important crises of the wine sector which occurred in 1928, 1935, and 1958, this movement would be returned to.

Blamed for these serious crises were the large harvests which, in an environment with a total lack of control of production associated with low consumption in the internal market, created strong oscillations in the price paid for grapes, the formation of elevated stocks of wines, and an accelerated fall in their prices. Moreover, particularly in the 1935 and 1958 crises, this was aggravated by the emergence of new centers of production in the state.

During the 1928 crisis, with government support wine producers created the *Sindicato Vitivinícola do Rio Grande do Sul* to organize the sector. The following year its commercial arm, *Sociedade Vinícola Riograndense*, was created, amongst whose founding partners were 49 of the largest wine producers in the region. Their actions provoked numerous conflicts with grape growers, who in a defensive action between 1929 and 1936 resurrected the cooperative movement. More than 50 cooperatives were created at this moment, including Aurora, Aliança, and Garibaldi.

In the 1940s *Sociedade Vinícola Rio Grandense* innovated by strategically establishing bottlers outside Rio Grande do Sul, creating units in Bahia, Paraná, Rio de Janeiro, and São Paulo, as well as the *Porto do Rio Grande* (RS). At its peak it was responsible for 25% of wine production in the state and was fundamental in the

increased sale of Brazilian wines. Its policy of regulating stocks to avoid shortages or excess supply in the market was important in avoiding disastrous oscillations in prices.

Weakened and pressurized by the serious economic crisis of the 1990s, *Sociedade Vinícola Riograndense* closed its industrial units in Brazil and diversified its activities, looking for business opportunities in other sectors. Part of its large wine-growing property of Granja União, which had been created in 1931, was divided into urban lots due to its proximity with the urban perimeter of Flores da Cunha.

In 1997 there occurred the inevitable dismantling of *Sociedade Vinícola Riograndense* as the company closed down and its trading name sold. The brands it owned like Granja União label were sold to the Cordelier Winery.<sup>1</sup>

### **The arrival of multinationals and their impact on Brazilian viticulture**

In 1973 and 1974 various multinationals effectively entered the Brazilian markets, including Martini & Rossi/De Lantier, Heublein, Provifin/Moët&Chandon, Seagram's do Brasil/Maison Forestier, National Distillers/Almadén.

The entrance of these large companies into the national market considerably improved the quality of Brazilian wines. Using their economic strength they propelled the development of winegrowing in the country through important policies for viticulture, the introduction of new equipment and technology, and innovation strategies for operating in the market including: differentiated prices and bonuses for grape growers who produced higher quality grapes; incentives for the conversion of vineyards from the *trellis* or *pergola* vine training system to *espalier*; the planting of fine European grapes which permitted an improvement in the quality of wine; the introduction of advanced technologies which made the production of superior white wine feasible; and aggressive marketing campaigns for the expansion of the consumer market.

This provoked a strong reaction from Brazilian producers who had no other alternative than to improve the quality of their products. Technological investments were made in industrial installations, in viticulture, and in enology courses for members of the families which owned the wineries. Furthermore, practical enologists began to be replaced by enologists with technical and scientific training.

During the 1970s and 1980s, in the wake of the success of the multinationals, many new wineries producing fine wines emerged: Jota Pe/Perini (1972), Luiz Valduga providing wines for Dreher (1973), Monte Lemos/Dal Pizzol (1974), Wizard/Monte Reale (1975), Courmayer (1976), Provino (1978), Cave de Amadeu/Vinicola Geisse(1979), Don Giovanni (1982), Boscato (1983), Adegas Domecq/AlliedDomecq (1985), Casa Valduga (1985), Giacomin (1985), Dom Cândido (1986), Cavalleri (1987), and Cordelier (1987). Some older wineries, such as Salton (1910), Marco Luigi (1946), and Cave Marson (1970) also began to produce fine wines.

One of the most important was Casa Valduga, currently part of Grupo Famiglia Valduga Co. Founded in 1985, in

the 1990s the winery effectively and definitely migrated to the fine wines sector, in a development which placed it among the leaders of the Brazilian market. In 1992 it expanded its activities aimed at enotourism with the establishment of restaurants and *pousadas* (rural guest houses). Following this it constructed the first enotourism complex in Brazil.

The opening of the Brazilian market in the 1990s to imported wines provoked an immediate improvement in the quality of products offered, but at the same time it created difficulties for the permanence of the multinationals. As a result, all departed from Brazil or left the fine wines market. Their departure caused a serious crisis in Brazilian viticulture as they left the large grape producers of the Serra Gaúcha without purchasers. The only multinational which remained was Moët & Chandon.

Another consequence was the emergence of small and mid-sized wineries with the aim of producing fine wines to compete with the imported ones.<sup>2</sup> Various of their owners were small or mid-sized grape growers who had traditionally sold their grapes to the large wineries.

To improve the quality of their wines, the education level of their children was increased by sending them to study enology in Brazil and abroad. The principal strategy adopted was the construction of small wineries, retail shops, and hotels to attract rural tourism, commencing the by now sophisticated enotourism in the Serra Gaúcha.

Outstanding in this group was Vinícola Miolo, which between 1990 and 1998 moved from being a small winery to becoming part of the group of the largest wine producers, transforming itself into the largest producer of fine wines in Brazil. Between 1979 and the creation of the winery in 1990, the Miolo family had already been recognized by the large wineries established in the market, such as Salton, Dreher, Martini & Rossi, Maison Forestier, due to the quality of the grapes it produced. Due to difficulties in grape sales, in 1989 Miolo started to produce its own wine.

### **In search of modernity**

Traditional Brazilian wineries and grape growers who managed to resist the hurricane of multinationals and investors had no other alternative but to fight. Resulting from this was the commencement of investments in viticulture and training in enology for family members who stopped being practical and curious and transformed themselves into professionals with scientific backgrounds, as well as improvements in organization and administration.

<sup>2</sup> We can cite here: Vinicola Miolo (1990/2006), Vinícola Don Laurindo (1991), Cantina Strapazzon (1992), Vinícola Monte Rosário (1993), Famiglia Tasca (1994), Vinícola Salvati & Sirena (1994), Vallontano Vinhos Nobres (1995), Terrasul (1996), Adega Esplendor (1997- closed), Lovara Vinhas e Vinhos (1967/1997), Vinícola Valmarino (1997), Velha Cantina (1997), Cave de Pedra (1997), Lídio Carraro (1998), Vinicola Pizzato (1998), Luís Argenta Vinhos Finos (1999), Vilmar Bettú (end of the 1990s), Vinícola Salvador (1998), Cristófoli Vinhedos e Vinhos Finos (1998), Máximo Boschi (1998), Angheben Adega de Vinhos (1999), Cordilheira de Santana (1999), and Vinho Laurentis (2000).

<sup>1</sup> Ferreira, Valdiney and Ferreira, Marieta. *Vinhos do Brasil; do passado para o futuro*. Rio de Janeiro, FGV Editora, 2016.

In 1995, at the initiative of wine producers, Brazil became a member-state of the International Organization of Vine and Wine (OIV).

At the end of 1997 the Brazilian Wine Institute (IBRAVIN) was created in Bento Gonçalves. It represents around 13,000 wine producing or grape growing families, and more than 600 vinification units in the state of Rio Grande do Sul alone. These bodies are organized as grape producers, wine producers, and cooperatives. The fundamental role of the Institute is to unify the viticulture sector and keep it cohesive, guaranteeing the egalitarian participation of grape producers, the producers of wine, and cooperatives in its decision-making.

In 1999 the President JK Federal Agrotechnical School (founded in 1959 as the School of Viticulture and Enology and altered in 1964 to the College of Viticulture and Enology – CVE), which offered a technical course in enology, also began to offer third level courses. In 2002 school changed its name again to the Federal Center of Technological Education (CEFET). Almost all current Brazilian enologists have graduated from this school. Another result attributed to the entrance of these enologists to the market is the increase in the number of small and mid-sized wine producing companies.<sup>3</sup>

In the following years, a significant number of recently created wineries, or previously existed ones which had undergone modernization processes, expanded their activities enormously, ranging from investments aimed at intensifying the use of technology to enotourism development programs with the purpose of attracting a new consumer public who would associate wine with history and culture. Some central elements have been consolidated as directives to be followed, while the focus on the quality of wine has come to be an obsession for the new generations who have come to occupy the commanding positions of command in the new business of these families.

These important transformations can be perceived in the statements collected<sup>4</sup> from different generations of the

<sup>3</sup> After 2000 more than 100 wineries producing fine wines were created. Of these only four have since closed down. Among these new wineries are: **2000:** Cordilheira de Sant'Ana, Don Bonifácio, Don Guerino, Ouro Verde, Quinta Ribeiro de Mattos (closed), Vinhedos Hood, Villagio Grando; **2001:** Décima X, Hermann, Larentis, Terragnolo, Villa Francioni (SC); **2002:** Campos de Cima, Cave Ouvidor (closed), Don Miguel, Don Pedrito, Dunamis, Routhier & Darricarrère, Sanjo, Sozo, Terras Altas; **2003:** Copetti & Czarnobay, Don Guerino, Pericó, Peruzzo, Santa Augusta, Villa Bari, ViniBrasil; **2004:** Adolfo Lona, Antonio Dias, Coopernatural, Dezem, Ducos (SF), Monte Azurro, Quinta Santa Maria, Santo Emilio; **2005:** Abreu Garcia, Aracuri, Bella Quinta, Don Abel, Estrada Real, Estrelas do Brasil, Generoso (closed), Pirineus, Villagio Bassetti; **2006:** Almaúnica; **2007:** Batalha, Era dos Ventos, Kranz; **2008:** Arte da Vinha, Bellavista Estate, Éléphant Rouge, Quinta da Figueira, Ravanello, Vicari, Villagio Conti, Wine Park; **2009:** Camponogara, Guatambu; **2011:** Leone di Venezia, Villa Cristina; **2014:** Negro Ponte Vigna, Vinha Unna; **2015:** Casa Ágora.

<sup>4</sup> A fundamental source for this paper was the Gaúcho Wine Oral History Project, whose objective was to produce a database of interviews about the origin and trajectory of families descended from Italian immigrants who had settled in the Serra Gaúcha. This source of data offers an important set of information and

owners of the companies and their families. It is clear in their reports how they have connected past, present, and future, and how family memories are tools for the construction of new identities. In this valorization of memories, elements such as *family, discipline, education, work, and professionalization* are selected as references to integrate and guide the construction of future projects and the formatting of family business.

### A distant past

In the interviews with the older and newer generations we sought to identify which elements were fundamental in the recovery of the past. In the account of Juarez Valduga, president of Grupo Famiglia Valduga Co., about his time in the seminary where he studied to become a priest, we can observe how important the values of discipline and family are:

*"What made me behave like that, I believe, was the fact of my foundations, which are family, simplicity, modesty, and work. It was this which led me to the seminary. In the seminary, there was a lot of discipline, but I had already been disciplined in my family. And I am like that still today."*

In another part of his statement Juarez Valduga shows how the notion of family, portrayed in the figures of his parents, had a powerful influence on his behavior as a man, father, and businessman:

*"I would say that my parents influenced by behavior. They did not speak much. They did. This attitude of theirs is probably the strongest thing that I have. My father did not need to say that he had to work. He worked. He did not say that he had to be honest. He was extremely honest. He was not a cultivated man. For me he was more wise than cultivated."*

Alexandre Miolo, commercial director of Miolo Wine Group and who is from a younger generation, in his account of his daily life in the colony showed how important the values of education and work were:

*"All the family worked directly in the colony since they were young. We lived close to where the winery is now, in Linha Leopoldina. Five hundred meters below, along that little road. The houses are still there. My father and uncles now live in the city of Bento and go there occasionally. But it was there that they all lived. We studied there in the morning, or the afternoon, depending on the year. If we studied in the morning, in the afternoon we worked in the colony; if we studied in the afternoon, we worked there in the morning. Afterwards I went to study in Bento and later to Caxias. The work was in the fields. In the vineyard, we did the pruning, harvesting, the phytosanitary treatment. Moreover corn and sugarcane were planted, and everything necessary for our subsistence. The principal business was grapes, which was where we made money. We worked, we studied, and for the reality of the time, we lived well."*

As can be seen, the statements, even when from different generations, present common elements, amongst

constitutes an extraordinary instrument of reflection. Carried out in 2015 and 2016, the project has 32 statements related to 17 companies and around 40 hours of recording. The material is published in Ferreira, Valdiney and Ferreira, Marieta. *Vinhos do Brasil- do passado para o futuro*. Op. cit.

which the valorization of work, discipline, the family, and determination are especially important.

### The challenges of the present

Another important point illustrated by the selected statements is their visions of the present, in which there stand out elements such as *work, innovation, planning, professionalization*, and the obsessive search for *quality* in wine production.

Adriano Miolo, executive director of the Miolo Wine Group, highlighted at different moments of his interview the importance of these values in the traditional family company which has become one of the largest in the Brazilian wine industry; here he discusses the motivation to study enology as a means of evolving his activities:

*"What led me to study enology was the obvious – I had spent my entire life in the vineyards with my father. I imagined I could advance, I mean study, to find out more, but always in viticulture."*

Talking of his experience in contacts with multinational companies who came to Brazil in the 1970s, his fixation with education and professionalization is evident:

*"The almost four years I spent in Martini & Rossi was my foundation in viticulture and enology. I learned a lot. For a young graduate, to join a top company was really very important. I had done my basic training, but since I wanted to understand more, to grow, I decided to study in Mendoza, because at the time we did not have a third level school of enology in Brazil, just the course in the Agrotechnical School. The closest third level course was in Mendoza. So I went there at the end of 1988 and stayed until 1995. It was a long time, obviously, and of course I completed my education."*

Eduardo Valduga, director of Casa Valduga, where he shared the helm with his father Juarez, is from a later generation than Adriano Miolo but following a similar trajectory in his education and professionalization, going to Mendoza to complete his studies before assuming his current function in Grupo Famiglia Valduga Co:

*"I went to Novo Hamburgo to Fevale, Faculdade do Vale, but did not like it. So, I decided to follow the family tradition and went to do a course in enology. When I left my other dreams behind, I fought tooth and nail to follow the dream of enology. It awoke a great interest in me, it was an enormous pleasure to study enology. And due to the influence of other Brazilian professionals who were going to Mendoza – there were four Brazilians from other companies making names for themselves in the wine market –, there emerged the idea of also taking advantage of this opportunity."*

The obsession with quality is constant in the narrative and practice of these companies. It had long since been perceived that without quality investments they would not go far. Let us look at what Adriano Miolo said about the quality project and use of new technology in the pioneering Miolo, years before the creation of the Miolo Wine Group:

*"In 1998 we began to invest in a quality project, starting with the vineyards. We knew that 'trellis' vineyards could not obtain the quality intended. So, the conversion of 'trellis' or 'pergola' vineyards to 'espalier' began and also the importation of shoots. We started the constructing of a new winery, because since 1989 we had only had a small*

*winery. We introduced new technologies, such as reverse osmosis and vacuum concentration."*

His brother Alexandre Miolo also spoke of the investments made in new technology in the implementation of the Quality Project as an important and necessary step to improve the product quality, particularly in the production of white wine:

*"We invested in a lot stainless steel equipment such as pneumatic press, tanks with automatic control of temperature. We bought the most modern equipment at the time. When we produced the first sauvignon blanc, the temperature control of the fermentation tank was done with a small hose and very cold water from an artesian well. Can you imagine this? Just as well that the tank only held three thousand liters. It what was possible at that time. Summarizing, I would say that the Quality Project fundamentally consisted of a radical change in viticulture to improve grape quality and in the use of modern equipment in the industrial plant."*

This is repeated by Juarez Valduga when he comments on the radical position of his company in relation to the preparation of still red wine during the most difficult harvests that are so common in the Serra Gaúcha:

*"I do not make the wine. Even if it is a great success in terms of sales, with which I will make money, but I would lose prestige, so I would prefer not to make it. Because in the future the demanding consumer will penalize me. Some of my products which people ask to return, I prefer not to make."*

In addition, in the statement of Jones Valduga, from Domno do Brasil, we can see that themes such professionalization and quality were present in his father's generation. Here they are cited by him, as he is preparing to assume control, as a motive of pride:

*"The desire to evolve in business and to begin to make a high quality bottle of wine with modern techniques was always present. My father studied and decide to use his knowledge to grow. Casa Valduga was the first company in Vale dos Vinhedos to produce in stainless steel tanks and to use cold fermentation processes. In 1988, Valduga was the first winery to use stainless steel tanks in Vale dos Vinhedos."*

Talking of the strategy of Domno do Brasil to diversify the activities of Grupo Famiglia Valduga Co, beginning to import wine and launching more competitive sparkling wines to sell large volumes, Jones even cites the obsession with quality as a problem:

*"The focus is on quality. We cannot simply open an importer and bring any wine. This could create a problem with the position of Valduga's premium products. So, the philosophy was always to do the best in Domno as well. When we started the Domno project it was to produce competitive products that sold well. But we have a problem because we always want to improve a label, use a bit of a better bottle. And in this improvement the products ended up being very good."*

The new generations who are assuming control of companies have no doubt that quality is the fundamental prerequisite for survival in the competitive Brazilian market. However, dialogue with their parents, who still participated in the business, was not always easy. The interview with Giovanni Carraro, the youngest son of Lidio Carraro founder of the winery which bears his name,

shows this in the changes made in the vineyards to improve the grape quality:

*"The preponderant vision was to produce more grapes per plant, and per hectare, as for many this was their only source of revenue. And when the moment for espalier production arrived, in which it was necessary to cut branches, I remember that in the first harvest we had to fight with Lídio. Even when he wanted to do something different, this hurt him a lot. After all it was fruit. It was there on the plant, sometimes it was already becoming ripe, and we cut it off and threw it away. At the time this was inadmissible."*

While elements of work and family appear as relevant when the focus is the past, what changes or remains when the perspective is turned to the present and the future? The statements analyzed continue to place work as a fundamental value, but now associated with professionalization and planning to also achieve a high level of quality in business.

### **On the horizon future expectations**

A third point which can be perceived in our reading of reports refers to the strong belief in the future, where new business strategies become the principal focus. Values such as differentiation, audacity, planning, professionalization are presented as the basis core in the organization of reports.

Explaining how administration functions with the different shareholders of the Miolo Wine Group, the executive director Adriano Miolo gives us insights about intentions for the future:

*"After completing the structuration, the company also organized itself to open its capital. In the future, we expect to open to the Stock Exchange. From the analyses we have, it is not worth doing this now. But to a certain extent we have already opened our capital. The RAR, Benedetti, and Galvão Bueno groups are now shareholders of the company. Of course, the company has a project. It has the biggest vineyard in Brazil. No one has close to the over 1000 hectares we have. There are four industries, more than 500 employees. This company has to have a strong structure, including in terms of capital. And it is organizing for this."*

When asked about family projects to continuity the successful trajectory of Grupo Famiglia Valduga, Eduardo Valduga, director of Casa Valduga, demonstrated a concern with the professionalization of administration:

*"In the short term, what we are responsible for is organizing the family using the science of administration. Looking for the best practices to organize the company in the form of a company which represents the family organization. Finding the best form to organize the three families as a company. Harmonize and distinguish the corporate bodies and the individuals. Maybe it will be necessary to create other companies, holdings, corporations, councils, administrative bodies, boards. I believe we have this task. Jones can complement this if it wants. For me the long-term is unknown. The family began with a father who created Luis Valduga & Filhos, moved onto brothers who formed Famiglia Valduga Co. Now we are cousins, afterwards will come the second cousins and so forth. This will get ever more complex in the question of*

*family involvement. So, each step of our generation has to be in the search of effective and efficient professionalism."*

Daniel Salton, who holds the positions of CEO and Chair of the Board of Vinícola Salton, the oldest family owned winery in Brazil, in explaining the reasons for the longevity (more than 100 years) of his family company, highlights the professionalization of administration:

*"Today Salton is no longer just the family, it is Salton with a professional family. We have stopped being amateurs. To be a director it is necessary to have minimum requirements. We changed the statutes, the shareholders' agreement, and professionalized the entire company. No one holds a position in the organization just because they are from the family, they have to be competent."*

In commenting on the decision-making process for the wine of the 2016 World Cup, Juliano Carraro mentions the daring posture of Brazilian wineries, which in 2011 ran a serious risk of losing the opportunity to a large Chilean winery. In the end, the Lídio Carraro winery won with its Faces line of wines:

*"In 2011 we participated in Soccerek, the International Football Fair, held in Rio de Janeiro, since Brazil would host the next World Cup. The participation of Concha y Toro was certain. It was to be the exclusive sponsor of the fair and there were many rumors that it was making a deal with FIFA to prepare the official wine of the World Cup. [...]. We paid for space inside to show Brazilian wine, because although it was not a FIFA fair, it was a football fair, and everyone from FIFA would be there. There would even be a stand inside. So, we did this and repercussion was excellent. They decided that it would not make sense to make an agreement with a company from outside Brazil, when we had wineries here with great wines."*

### **The past as a strategy for the future**

Having presented this general vision of the statements as a whole, we can perceive that some of the elements analyzed gained more relevance over time, while others, even though they still remain, have lost prominence. Nevertheless, the *leitmotiv*, the recurrent elements the value of work associated with quality, planning, and professionalization.

In the statements analyzed we can highlight the narrative capacity presented with the organizational and logical connection of the discourse, emphasizing family union and the importance of Italian immigration as an explanatory factor for the dedication to work. The positive valorization of Italian origins and the connection established with their esteem for work justify why the long distant past and the founding moment are always raised as something which reinforces local identity. Conflicts and disagreements do not appear as important elements, in contrast family ties gain importance. One of the manners of strengthening the identity and memory of leaders, communities, and political groups lies in the care taken with the preservation of their memory. The past is important, both as a landmark of an action that has been strengthening over time, and as a reference to more detailed reflections about the paths intended to be followed.

As we know, oral statements are memories which represent different versions of the past and express

contradictory memories, forgetfulness, distortions, conflicts, and cannot be taken as ‘true’ and ‘objective’ reports of the narrated facts; nevertheless, and for this reason, they grant us access to rich material and to information rarely found in other sources.

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