

Territory and governance: an analysis of the Beer Sector Chamber in Brazil

Território e governança: uma análise da Câmara Setorial da Cerveja no Brasil

Territorio y gobernanza: un análisis de la Cámara del Sector Cervejero en Brasil

Territoire et gouvernance : une analyse de la Chambre du Secteur de la Bière au Brésil

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ABSTRACT

This article aims to analyze the territorial governance of the beer sector in Brazil through the establishment of the Beer Sector Chamber. The methodology involved a literature review on the concepts of territory, governance, and development; an examination of the legal framework of Sector Chambers; a historical analysis of power disputes; and the framing of the territorial governance of the beer sector according to the research methodology. Additionally, interviews were conducted, and participation in the chamber's meetings was undertaken. The findings reveal the formation of socio-territorial blocs around the beer sector and their role in negotiation, sharing, agreements, consensus-building, and power struggles, resulting in specific configurations of networked territorial governance through the Beer Sector Chamber.

KEYWORDS: territory; governance; beer.

RESUMO

Este artigo tem como objetivo analisar a governança territorial do setor cervejeiro no Brasil mediante a criação da Câmara Setorial da Cerveja. A metodologia utilizada abrangeu uma revisão bibliográfica dos termos território, governança e desenvolvimento; a estruturação do arcabouço legal das Câmaras Setoriais; o histórico das disputas de poder e o enquadramento

da governança territorial do setor cervejeiro de acordo com a metodologia proposta pela pesquisa. Além disso, foram realizadas entrevistas e a participação nas reuniões do colegiado. Como resultado, foi possível verificar a formação de blocos socioterritoriais em torno do setor cervejeiro, bem como sua posição de articulação, partilha, pactuação, consensos e disputas de poder, gerando configurações específicas de governança territorial em rede por meio da Câmara Setorial da Cerveja.

PALAVRAS-CHAVE: território; governança; cerveja.

RESUMEN

Este artículo pretende analizar la gobernanza territorial del sector cervecero en Brasil a través de la creación de la Cámara del Sector Cervecero. La metodología utilizada abarcó una revisión bibliográfica de los términos territorio, gobernanza y desarrollo; la estructuración del marco legal de las Cámaras Sectoriales; la historia de las disputas de poder y el encuadramiento de la gobernanza territorial del sector cervecero de acuerdo con la metodología propuesta por la investigación. Además, se realizaron entrevistas y la participación en las reuniones colegiadas. Como resultado, fue posible verificar la formación de bloques socioterritoriales en torno al sector cervecero, así como su posición de articulación, intercambio, acuerdo, consenso y disputas de poder, generando configuraciones específicas de gobernanza territorial en red a través de la Cámara Sectorial de la Cerveza.

PALABRAS CLAVE: territorio; gobernanza; cerveza.

RÉSUMÉ

Cet article vise à analyser la gouvernance territoriale du secteur de la bière au Brésil à travers la création de la Chambre Sectorielle de la Bière. La méthodologie utilisée comprenait une revue bibliographique des termes territoire, gouvernance et développement ; la structuration du cadre légal des Chambres Sectorielles ; l'histoire des conflits de pouvoir et le cadrage de la gouvernance territoriale du secteur de la bière selon la méthodologie proposée par la recherche. De plus, des entretiens et la participation aux réunions collégiales ont été réalisés. En résultat, il a été possible de vérifier la formation de blocs socio-territoriaux autour du secteur de la bière, ainsi que leur position d'articulation, de partage, d'accord, de consensus et de conflits de pouvoir, générant des configurations spécifiques de gouvernance territoriale en réseau par le biais de la Chambre du secteur de la bière.

MOTS-CLÉS : territoire ; gouvernance ; bière.

INTRODUCTION

In the context of studies at the intersection of Political Geography and Economic Geography, there is an extensive debate regarding the role of the state. Generally, these studies tend to adopt a hierarchical perspective on power, portraying the state as a dominant agent. From this standpoint, the state exerts its authority vertically through economic force, functioning as an investment catalyst, treasury controller, regulatory entity, fiscal authority, and enforcer of laws that directly impact both macro- and microeconomic dynamics. This process unfolds while maintaining the legal monopoly on force and managing the risks of internal and external threats to democratic regimes.

This article, however, takes an alternative approach to state analysis. Without relegating the state to a secondary role, it seeks to examine its functional plasticity through the lens of governance. Given the polysemic nature of the term, we adopt the perspective proposed by Bob Jessop (2017), who conceptualizes governance as a shift from traditional government structures toward new political practices. According to Jessop, the state is increasingly required to relativize its position as a sovereign authority within a hierarchical command structure and instead play a continuous role in the reflexive self-organization of multiple stakeholders. This involves engagement with complex, heterogeneous, and multi-level networks, underscoring the importance of coordination and the formation of power networks.

A prime example of the state's flexible role in governance is examined through the implementation of Sectoral Chambers (Câmaras Setoriais, CS) in Brazil, with particular focus on the recent creation of the Sectoral Chamber of Beer (Câmara Setorial da Cerveja, CSC).

Sectoral Chambers emerged in Brazil in the late 1980s, coinciding with a period of state repositioning concerning society in political, economic, and social spheres. Politically, the country was undergoing democratization, marked by significant mobilizations to incorporate previously marginalized social actors into representational structures. A notable example is the labor movement, which demonstrated strong national organization.

In the economic sphere, the state's interventionist model gradually gave way to neoliberal directives, marked by economic liberalization and a significant reduction in the Brazilian state's role, primarily through privatization efforts. Meanwhile, in the social sphere, the 1988 Federal Constitution became a milestone in the expansion of social rights, fostering increased participation and organization within civil society, particularly through national councils, non-gov-

ernmental organizations (NGOs), and social forums. This broader democratic opening underscore the urge for a repositioning of the state's role.

The selection of the CSC as the focal point of this study is justified by three key factors. First, it represents one of the most recent sectoral chambers despite the beer industry's long-standing presence in Brazil. Second, beer holds a well-established place in Brazilian consumption habits, driving substantial financial investments in *marketing* campaigns. Lastly, the sector has undergone significant transformations in recent years, notably the simultaneous rise of an oligopolistic market structure dominated by large corporations and the expansion of small breweries and craft beer production.

Thus, this study aims to analyze the territorial governance of Brazil's brewing industry through the establishment of the CSC as a practical example of emerging power structures. Against this backdrop, we examine the country's democratic transition at the end of the twentieth century to understand how new forms of representation and governance have materialized within the broader political framework of state-market-society interactions.

Beyond this introduction, which contextualizes the formation of Sectoral Chambers in the late twentieth century, this article includes a methodological section and explores key themes such as governance, territory, and development; the establishment of Sectoral Chambers within the Ministry of Agriculture as a power dynamic; and the creation of the CSC and its territorial implications. The concluding section reflects on how beer wields power and how its governance unfolds.

RESEARCH METHODOLOGY

The discussions presented in this article are grounded in an extensive literature review on the concepts of territory, governance, and development, aiming to clarify their interconnections and provide a framework for analyzing the CSC and its territorial governance. Additionally, an examination of the legal framework governing the formalization of sectoral chambers within the Ministry of Agriculture (MA) was crucial for understanding power struggles and the formation of socio-territorial blocs within the composition of these representative bodies.

Furthermore, five interviews were conducted with key figures in the sectoral chambers: the president and secretary, who are responsible for coordinating debates on critical issues related to the beer industry, as well as representatives from the three principal brewing associations within the CSC.

These interviews provided valuable insights into the dynamics among actors in the brewing sector and their interactions within the sectoral chambers.

The findings presented here also stem from participation in nine CSC meetings held between October 30, 2019, and October 13, 2021. These meetings allowed for an in-depth observation of the entities' actions, conflicts, and negotiation strategies, revealing the power dynamics that shape decision-making—whether by favoring the most influential stakeholders or by fostering alliances when issues achieve broad consensus. This observational approach was instrumental in categorizing governance types and assessing the extent to which this governance body adheres to the democratic principles established during Brazil's re-democratization process.

THE THEORETICAL FRAMEWORK OF GOVERNANCE, TERRITORY, AND DEVELOPMENT

Although the concept of governance has gained prominence in recent years, its origins trace back to the 1930s, when discussions primarily revolved around corporate governance. It was only in the 1970s that the term began to be more strongly associated with governance capacity in political systems. By the 1980s, governance had become a central theme in World Bank reports, shifting toward discussions on the efficiency of a nation's economic management, a notion later termed "good governance" by the International Monetary Fund (IMF). Today, the term is applied across a range of entities, including corporations, institutions, governmental and non-governmental organizations, and at various scales and intersections of society (Pires *et al.*, 2011).

Thus, governance extends beyond state administration, as it refers to "mechanisms and coordination strategies in response to the complex reciprocal interdependence among actors, organizations, and functionally autonomous systems" (Jessop, 2017, p. 278).

Jessop's (2017) conceptualization of governance emphasizes network-based governance, which emerges through "various forms of control exerted by different public and/or private agents, as well as non-state social actors who influence the social, political, and economic coordination of key activities" (Bezerra, 2017, p. 110). Governance, therefore, operates as an intermediary concept between state and market, as well as between the global and the local, "encompassing diverse forms of territorial regulation and control, implemented through networks and agreements among social actors,

who jointly define formal or implicit mechanisms to address unprecedented challenges" (Pires *et al.*, 2011, p. 2).

In this context, governance emerges as an organizational and institutional construction process, shaped through formal consensus among geographically proximate actors who seek different coordination mechanisms to address challenges posed by the evolving production of territories (Pecqueur, 2000). Territory thus becomes both the locus and the medium through which governance unfolds, linking to the concept of territorial governance. This notion is based on the continuous, albeit partial and temporary, alignment of commitments among actors, structured in two keyways: first, through interactions between economic actors and institutional, social, and political agents; and second, through the mediation of locally embedded actors who bridge the gap between global economic and institutional frameworks (Gilly & Pecqueur, 1997).

The governance process is driven by the formation of socio-territorial blocs, defined as heterogeneous groups of territorial actors who, at a given historical moment, assume a hegemonic position, shaping socio-territorial power networks. The agreements forged through these governance practices result in socio-territorial pacts (Dallabrida, 2007).

Socio-territorial power networks reflect the organized territorial structure of society, represented by its leadership, which, at different historical junctures, takes on a hegemonic role, setting the ideological and political course for development. These leadership groups, often in competition, are compelled to negotiate agreements—whether temporary or lasting—to maintain hegemony, forming power blocs that shape territorial development (Dallabrida, 2007).

It is crucial to emphasize that the interplay of actors, institutions, and historically embedded societal structures defines territorial dynamics and governance structures. Based on this understanding, governance materializes as a territorial phenomenon, shaped by the interactions between diverse actors and institutions that establish rules and routines, ultimately defining the local specificity of a given productive system within the national framework. The regulation of territorial governance considers actors' strategies, the territory's capacity for adaptation and learning, and the influence of external sectoral logics (Gilly & Pecqueur, 1997).

Governance becomes territorial when the territory itself is recognized as the spatial arena where businesses, states, and civil society interact, manifesting varying degrees of conflict and cooperation and, consequently, steering the ter-

territorial development process. In this sense, “territorial governance, as a concept, instrument, and process of action, could be understood as the new ‘pilot’ of decentralized economic and social development” (Pires *et al.*, 2011, pp. 26–27).

A first conceptual alignment among these elements can be established through a prism in which articulations are structured around development-oriented actions, with territory understood as the spatial projection of power relations (Souza, 2013). Development—conceived not as an abstract, linear progression but as an intrinsically spatial process—presupposes a “transformative improvement in social relations and space, fostering a better quality of life and greater social justice” (Pires *et al.*, 2011, p. 286).

In governance debates, the concept of development is closely tied to efforts to counter heteronomy, that is, the structural asymmetry of power. Within this framework, private actors, state institutions, and civil society interact to devise innovative strategies for economic and spatial development, organizing themselves through various power structures.

Each dynamic generates distinct forms of spatial organization that evolve according to the degree of articulation and maturity of projects, resulting in different modes of territorialization. Governance structures, in turn, function as levers for competitiveness and territorial development within regions and productive clusters.

The diverse ways in which territorial governance is structured allow for the classification of different models (Table 1), based on the level of cooperation among territorialized actors, their origins, and their objectives. Thus, we can verify the role of agents and institutions and their organization, as well as that of the State in its three spheres (federal, state, and municipal) to interpret their importance in the construction of territorial governance.

Table 1 – Types of territorial governance

Type of Governance	Characteristics
Private Governance	Refers to dominant private organizations that drive and manage resource coordination mechanisms with the objective of private territorial appropriation. In this model, a large corporation (or corporate group) functions as the central engine of the system, shaping local and regional productive spaces.
Private-Collective Governance	The key actor is a formal organization that brings together private operators and drives resource coordination and strategic planning. This category includes employer associations and business unions that organize private actors and structure local and regional production spaces.

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Type of Governance	Characteristics
State-Private Governance	The state and public institutions guide the coordination of territorial resources and strategies in partnership with the private sector through public agencies, autonomous entities, and collective services, responding to the demands of public or private actors within the territory.
Private-State Governance	Private organizations leverage privileged forums and arenas of dialogue with the state to propose and steer power network articulation processes, aiming to organize and develop their sectors and territories.
Public-Tripartite Governance	Involves public institutions, private organizations, and civil society, which collectively drive the shared coordination of territorial resources and strategies through chambers, councils, consortia, committees, agencies, or forums dedicated to public policy management. These are hybrid and relatively rare governance arrangements, characterized by relative autonomy and the absence of unilateral control.

Source: Adapted from MARCUSSO (2018).

The typology of governance defines the leading actors responsible for territorial organization, identifying those who govern the territory and the key agents initiating coordination among stakeholders. This framework enables the classification of governance models present in real-world contexts.

The first experiences of territorial governance in Brazil emerged in the 1990s, beginning with the Regional Development Councils (COREDES) in Rio Grande do Sul. These were later followed by initiatives such as Sectoral Chambers, Local Productive Arrangements, Intermunicipal Tourism Circuits, Intermunicipal Consortia, and Watershed Committees (Pires *et al.*, 2011).

A deeper analysis allows us to outline the fundamental principles of territorial governance, which help assess the level of commitment among actors to a collective governance logic and demonstrate the degree of adherence to governance structures (Table 2).

Table 2 – Fundamental principles of territorial, democratic, and tripartite governance

Basic Principles	Characteristics
Focus	Clear definition of institutional objectives, facilitating the work of managers and participants while aligning actions with public policies at local, regional, state, and national levels.
Mechanisms	Instruments designed to promote and operationalize territorial governance principles (meetings, working groups, public hearings, negotiation tables, etc.), aimed at meeting stakeholders' expectations.
Transparency	The quality of social relations among actors, ensuring clarity in actions, well-defined roles and responsibilities, and a commitment to publicizing and granting access to relevant data and information.

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Basic Principles	Characteristics
Participation	The quality and balance of social and political representation, ensuring equal or differentiated participation conditions for actors, organizations, and institutions in decision-making processes.
Representativeness	The democratic quality of social and political participation, guaranteeing that representatives articulate a collective discourse that clarifies who participates, how participation occurs, and its implications.
Accountability	The responsibility and obligation to provide data, report on actions taken (or omitted), justify decisions, and engage in argument-based interactions.
Coherence	The consistency of actions and integration of stakeholders with the governance focus, ensuring alignment between situations, events, and ideas, thereby strengthening decentralized territorial management for agreements and development strategies.
Trust	The effectiveness and consensus of actions, as well as the credibility of leaders and managers, fostering cooperation and best practices in decentralized territorial management to facilitate agreements and governance development.
Subsidiarity	The structural capacity to provide auxiliary resources, support mechanisms, or complementary elements that reinforce or contribute to broader governance initiatives.
Autonomy	The relative capacity of the governance structure to self-regulate independently of the state and public policies.

Source: Pires *et al.* (2017).

From the perspective of the principles guiding the notion of governance, it is possible to consider governance as a specific territorial resource, structured in service of its development (Benko & Pecqueur, 2001). The greater the degree of shared decision-making within a territorial governance structure, the higher the level of satisfaction among its participants, as their objectives are more effectively addressed. In this sense, governance emerges as a theoretical approach precisely when diverse modalities of political-regional and local administration are established, fostering consensus and power networks among businesses, public authorities, and civil society organizations (Pires *et al.*, 2011).

Territorial governance is made through the interaction of various actors, institutions, state agencies, and civil society organizations within socio-territorial power networks. In these new forms of organization, territories become the “guiding thread” of governance strategies and territorial development (Veiga, 2002).

Thus, territories serve as “sources of development” (Aydalot, 1986), establishing an intrinsic link between development and governance through the

notion of territory. Consequently, in the context of globalization, development must be understood as fundamentally conditioned by the territory itself, where policies, organizations, and governance function as both existing and potential resources to be cultivated.

Territorial development, therefore, results from an intentional, locally driven collective action that constitutes a mode of territorial regulation. It is intrinsically tied to local institutional and cultural frameworks, shaping regulatory arrangements for social practices (Pires, Muller & Verdi, 2006).

Considering the interrelation between the concepts of territory, governance, and development, governance functions as a crucial resource for territorial development. These three dimensions are interconnected through power relations, shaped by agreements and commitments among socially, culturally, and economically embedded actors. If territorial development is the main goal, its success increasingly relies on social organization and the creation of spaces for dialogue and negotiation among different social actors, ensuring an economically balanced, socially just, and environmentally sustainable territorial development (Pires, 2016).

This theoretical framework linking territory, governance, and development provides the foundation for understanding governance structures within the brewing sector. One of the key elements of territorial governance in the beer industry is its Sectoral Chamber within the Ministry of Agriculture. However, to grasp its operational dynamics, it is necessary to examine the establishment of Sectoral Chambers within the ministry and analyze their power relations within territorial spaces.

THE SHIFTING DYNAMICS OF POWER WITHIN SECTORAL CHAMBERS IN THE MINISTRY OF AGRICULTURE

As discussed earlier, Brazil's democratization process was crucial in expanding channels for social participation and redefining the regulatory framework governing relationships between capital, the state, and organized civil society. Within this context, President Sarney issued Decree No. 96,056/1988, which, as part of industrial development policy, established Sectoral Chambers (Câmaras Setoriais) with the objective of fostering power-sharing between government agencies and the private sector. At that time, these chambers primarily focused on policies related to incen-

tives and pricing across various industrial sectors, with the most successful case being the automotive industry in the early 1990s¹.

The transition of Sectoral Chambers (SCs) to the Ministry of Agriculture (MA) was formalized through Law No. 8,028/1990, which restructured the executive branch and established the National Council of Agriculture (CON-AGRI). This legislation paved the way for the creation of specialized sectoral chambers dedicated to specific agricultural products, inputs, or activities. The subsequent Law No. 8,171/1991, known as the Agricultural Law, further institutionalized this framework by establishing the National Council for Agricultural Policy (CNPA), designating SCs as its functional mechanism.

This legal framework marked a significant step toward representing socio-territorial power blocs, providing opportunities for greater participation, and creating democratic forums for stakeholder engagement. However, a major limitation of this framework—left unaddressed by the law—was the privilege of large agricultural producers in policymaking, effectively consolidating their influence in shaping public policy (Delgado, 1994).

This period saw the creation of multiple Sectoral Chambers, comprising representatives from various productive sectors, public agencies, and labor organizations. However, the National Confederation of Agricultural Workers (CONTAG) remained the sole representative of workers within these chambers (Takagi, 2000).

The Ministry of Agriculture's Ordinance No. 535/1996 then established the National Agriculture Forum (FNA), which, through a public-private partnership model, formulated agricultural policies with input from approximately five hundred leaders in the agribusiness sector. Bolstered by its strong political backing, President Fernando Henrique Cardoso positioned the FNA as a key mechanism to enhance Brazilian agribusiness, emphasizing the private sector's role in the country's economic development. In an interview, the former president stated: "The government plays its part in supporting production, directing resources, ensuring fair competition, developing infrastructure, and providing a robust legal framework" (Cardoso, 1997, p. 3).

The Ministry of Agriculture's forum was heavily influenced by the private sector, particularly through Roberto Rodrigues, then Vice President of the

1 Between 1992 and 1995, the Automotive Sectorial Chamber facilitated agreements on pricing, taxation, and capital-labor relations, pioneering new forms of coordination between business owners and workers (Oliveira, 1993; Zauli, 1997). However, external agreements, such as those concerning economy cars, disrupted the institutional landscape.

Brazilian *Agribusiness* Association (ABAG). Rodrigues advocated for the FNA as a cornerstone of the neoliberal restructuring of the state, shifting away from the corporate model of a protective and interventionist government to a more market-driven governance approach. He asserted: We must seek interaction and momentum within the market. The FNA is the result of a new attitude, the search for new paradigms, and the formation of a new consciousness of partnership and citizenship for the collective construction of our future” (Rodrigues, 1997, p. 7).

Among the key FNA initiatives was a proposal to restructure the National Council for Agricultural Policy (CNPAs) as part of the Institutional Reorientation Program of the Ministry of Agriculture (PRIMA), established by Decree No. 2,001/1996². The PRIMA aimed to bifurcate power between the government and private sector, guiding the institutional restructuring of the Ministry of Agriculture in response to global economic shifts, increasing agribusiness competitiveness, and broader state reform efforts.

This strategy decentralized state authority, creating greater space for private-sector engagement in public decision-making—a private-state governance model (as classified in Table 1). This transition became more apparent in 1997 when the FNA established thirty-four thematic working groups to discuss pressing agribusiness issues in Brazil. These groups laid the foundation for new Sectoral Chambers.

Further reinforcing the argument presented in this study regarding the transition from state-private governance to private-state governance (Table 1).

Within this framework, the Agribusiness Council (CONSAGRO) was created by Decree of September 2, 1998, establishing an equal representation model between the public and private sectors and formalizing a structure for policy negotiation and strategic planning for Brazilian agribusiness in the medium and long term, based on the FNA’s proposals.

The first meeting of CONSAGRO took place on April 8, 2003, under President Lula’s first administration, during which Roberto Rodrigues, then serving as Minister of Agriculture, defined Sectoral Chambers for key agribusiness sectors and themes. The council reaffirmed six fundamental principles for public-private dialogue: equitable treatment across different segments of the production chains, service quality, food security assurance, competitive-

2 The PRIMA program was established as a pilot unit of the Master Plan for State Apparatus Reform, a document that guided state reform under President Fernando Henrique Cardoso (FHC) (Brasil, 1995).

ness, sectoral harmonization, and parity between public and private entities in governance (Vilela; Araujo, 2006).

Over the following years, numerous Sectoral Chambers were established. The number increased from 11 in 2003 to 17 in 2004, 20 in 2005, 23 in 2006, 29 in 2017, and 31 in 2019. During this period, Thematic Chambers (CTs) were also introduced, reaching a peak of seven, before stabilizing at five (Marcusso, 2018). The diversity of³ themes covered by these forums underscores their significance as platforms for public-private debate and channels for advocating sectoral demands before the government.

However, the election of Jair Bolsonaro in 2019 marked a rapid decline in democratic participation mechanisms. This shift was formalized through Decree No. 9,759/2019, which dissolved federal public administration councils, established new constraints and revoked their legal standing. This decree threatened to dismantle all national councils, including CONSAGRO. However, since the CNPA was established by law, the Supreme Federal Court (STF) intervened, limiting the decree's scope (Pontes, 2019, *online*).

This measure represented a significant regression in participatory democracy, effectively concentrating power within the federal government, which no longer had to engage in democratic debate. In response, the Attorney General's Office (PGR) questioned: How many voices are silenced by this decree? What is left unsaid when councils are dissolved? What are we refusing to hear⁴?

With CONSAGRO dismantled, concerns arose about the future of the Ministry of Agriculture's Sectoral Chambers (SCs). However, because SCs were legally tied to the CNPA under Agricultural Law, they required administrative realignment rather than outright dissolution. Consequently, Ordinance No. 253/2019 approved a new internal regulation for the CNPA, ensuring the continuation of SCs. However, this required revoking all thirty-six ordinances that had initially established SCs under CONSAGRO and reinstating them under the CNPA, which was formalized through Ordinance No. 13/2020.

Ironically, during this period of political instability, when SCs were most at risk, the Sectoral Chamber for the Beer Production Chain (CSC) was created.

3 All 36 sectorial chambers within MAPA, along with their meeting agendas and minutes, can be accessed on the ministry's website: <https://www.gov.br/agricultura/pt-br/assuntos/camaras-setoriais-tematicas>. Accessed in: July 17, 2024.

4 According to Luciano Mariz Maria, Deputy Attorney General of the Republic, "While we must respect the President's authority to exercise his prerogative in structuring public administration, there is a clear need to explicitly state the reasons, figures, and names of the entities he seeks to dissolve." (STF, 2019, *online*).

As highlighted, Sectoral Chambers serve as power hubs and socio-territorial representation mechanisms, positioning Brazil's agribusiness leadership while also providing small producers a voice—a crucial alternative to the traditional *lobbying* and influence mechanisms that favor large economic players.

THE ESTABLISHMENT OF THE BEER SECTORAL CHAMBER (CSC) AT MAPA AND ITS TERRITORIAL IMPLICATIONS

The power dynamics within the beer industry have long been significant and contested, given that the sector accounts for more than 2% of Brazil's GDP and hosts some of the world's largest brewing corporations. More recently, small breweries have gained market share and political representation, intensifying conflicts over competing interests (Marcusso, 2021).

Amid these power struggles, the Beer Production Chain Sectoral Chamber (CSC) was formally established at MAPA through Ministerial Ordinance No. 201/2019, following two years of negotiations with institutions, advocacy efforts targeting public authorities, and academic studies supporting its formation (Marcusso & Limberger, 2019).

After a lengthy negotiation and persuasion process, the first official meeting was held on October 30, 2019, with the participation of Minister of Agriculture Tereza Cristina, members of the Parliamentary Front for Agribusiness (FPA), and the Mixed Parliamentary Front for the Defense of the Beverage Industry. This scenario underscores the need for extensive coordination across multiple power networks to overcome obstacles and push the initiative forward.

The competition between large and small breweries dates to the 19th century, particularly with the advent of refrigeration technology, which revolutionized the production of bottom-fermented beers. The collective mobilization of brewers in defense of their interests shaped the industry's power dynamics, leading to the dominance of bottom-fermented beers and the near disappearance of top-fermented varieties in many beer-producing countries.

Marques (2014) offers a detailed analysis of the ongoing battles between large and small breweries for market share and differentiated tax policies, highlighting the complexity of public-private power relations, where the private sector itself can never be viewed as a monolithic entity.

Acknowledging the historically contentious nature of the beer industry in Brazil, the creation of the CSC represents a breakthrough, as it brings together a diverse range of stakeholders from “field to glass”—an unprecedented development in previous centuries.

As outlined in the existing regulatory framework, Sectoral Chambers serve as advisory bodies to the Minister of Agriculture, meaning that dominant actors within these forums gain privileged access to decision-making and ministerial influence within MAPA. A clear example of this power struggle was the contentious election of the CSC president. After negotiations between representatives of large and small breweries, an agreement was reached for a rotating presidency, with the first term assigned to a representative of microbreweries.

The CSC was founded with 24 entities representing various segments of the beer production chain, including agricultural producers, research institutions, suppliers of raw materials (such as bottles and cans), production companies, workers, trade associations, retailers, points of sale, and tourism representatives.⁵ Notably, 83% of these entities are headquartered in the Federal District and operate at the national level, centralizing their influence within the country's political and economic power structures. In terms of sectoral representation: 42% of the CSC's participants represent the beer industry; 21% are from the commerce sector; 17% represent agriculture; 8% come from government institutions, workers, researchers; and civil society organizations account for just 4%.

This distribution of power reflects the long-standing tension between agriculture and industry within MAPA's Sectoral Chambers, particularly in agroforestry and animal protein production sectors. However, this conflict is less pronounced in the CSC, as Brazil imports nearly 100% of its hops and 70% of its malt for domestic beer production (Beer Art, 2018, *online*). A major concern is the low representation of workers and civil society organizations within the CSC, reinforcing a bipartite governance model dominated by government and business interests, rather than a truly democratic tripartite structure (Marcusso, 2018). However, despite these limitations, the CSC's training was only possible due to MAPA's involvement, ensuring the broadest possible representation, including workers and consumers. This highlights the role of the state as a coordinating entity, demonstrating its functional adaptability within governance structures.

As seen, territorial power networks are widely distributed, with each entity drawing its legitimacy from its respective territory to advocate for its interests within the CSC. This is especially evident in regional debates within the

⁵ The complete list of chambers is available in MAPA Ordinance No. 13, dated January 15, 2020, which formalized the creation of the CSC.

chamber, where representatives organize local events to attract investment and foster regional development.

To assess the CSC's alignment with the principles of democratic tripartite territorial governance (as outlined in Table 2), a subjective rating system was applied based on participation and meeting dynamics. Scores were assigned on a scale from 1 to 5 for each of the 10 governance principles, where: 1 = Low; 2 = Medium-Low; 3 = Medium; 4 = Medium-High; 5 = High. With ten criteria evaluated, total scores ranged from 10 to 50, providing a qualitative assessment of the CSC's governance framework.

Table 3 – Assessment of governance principles in the Beer Sectoral Chamber

Nº	Basic Principles	Evaluation	Score
1	Focus	Medium-High	5
2	Mechanisms	Medium	4
3	Transparency	Medium-Low	3
4	Participation	Medium-Low	4
5	Representativeness	Low	3
6	<i>Accountability</i>	Medium-Low	3
7	Coherence	Medium	4
8	Trust	Medium-High	5
9	Subsidiarity	Medium	4
10	Autonomy	Medium-High	3
Total			38

Source: Marcusso, 2021.

The strong evaluation of the Beer Sectoral Chamber (CSC) stems from the agreements and understandings previously mentioned, which facilitate the smooth operation of its activities. The highest-rated principles were focus, mechanisms, and trust, while *accountability* and transparency revealed the absence of democratic characteristics within this specific governance model in the ministry. The CSC demonstrates a greater representation of small producers, ensuring coherence in actions alongside subsidiarity due to both explicit and implicit agreements within the chamber, which contributed to its positive evaluation.

As expected, the creation of a sectoral chamber does not occur without conflict. From what was observed in the research, particularly during the first meeting, there was a dispute over the chamber's presidency. On opposing sides were representatives of large breweries, through the National Union of the Beer Industry (SINDICERV), and microbreweries, represented by the Brazilian Association of Craft Beer (ABRACERVA). After a debate over which

entity should lead the chamber, an agreement was reached to rotate the presidency⁶ between large and small businesses, with a representative from microbreweries assuming the first term. This event reaffirmed the positive role of the chamber in ensuring a more balanced representation, rather than merely reinforcing hierarchical power structures in which the most influential actors dominate the discussion agenda.

This event reaffirmed the positive role of the chamber in ensuring a more balanced representation, rather than simply reinforcing hierarchical power structures in which the strongest dictate the discussion agenda. Regarding CSC operations, there have also been numerous instances of convergence, consensus, and mutual support between large and small players. Some key examples include unanimous support for large companies' requests, such as the importation of barley from the U.S. (to diversify supply and provide an alternative in case of crop failure in Argentina, Brazil's primary supplier); the CSC's stance in public consultations with the WHO regarding policies to combat harmful alcohol consumption, supporting such policies but opposing prohibitionist measures; the postponement of the enforcement deadline for IN65/2019 (new beer quality regulations, particularly concerning labeling); and the revision of Decree 6296/2007 (related to animal feed) and the corresponding regulation for redirecting malt bagasse to livestock feed.

Conversely, measures proposed by small breweries have also received broad CSC endorsement, such as the denial of beer style trademark registrations by the National Institute of Industrial Property (INPI), the inclusion of Beer Sommeliers in the National Classification of Economic Activities (CNAE), MAPA's intervention in the Backer brewery case to affirm beer's safety as a product, and a meeting with the Ministry of Tourism to showcase the beer sector's strong tourism potential.

One significant territorial impact of CSC actions was the inclusion of brewing activities in the "Experiences of Rural Brazil" program (Ministry of Tourism, n.d.). While beer tourism is generally an urban activity, rural breweries serve as key drivers in expanding this industry to rural areas. Thus, the CSC's initiatives have played a fundamental role in fostering the development of rural brewing territories.

⁶ As documented in the minutes of the first regular CSC meeting.

CONCLUDING REMARKS

As demonstrated throughout this study, the political-economic liberalization, and the increased participation of organized society in political debates following Brazil's redemocratization created a broad arena of conflicts and power struggles, leaving no domain untouched.

Recalling Bob Jessop's (2017, p. 289) reflections, governance practice is an expression of the recalibration of state power, which occurs "when the government makes greater use of networks and other governance mechanisms to maintain political effectiveness in the face of growing social complexity."

The theoretical articulation of governance, territory, and development provided a privileged analytical position to examine the formation of socio-territorial power blocs within the beer industry, their agreements, governance model, and the CSC's alignment with the principles of territorial governance.

The CSC governance model can be classified as private-state governance, where private actors drive discussions within the council and define strategies for sectoral and territorial development. Insights from interviews and meeting records highlighted key areas of CSC intervention, including barley imports from the U.S., sectoral positions at the WHO, the postponement of the new beer quality standards, and the revision of the decree on animal feed regulation. These actions, led by the chamber's president, influence government, industry, and territorial development—even indirectly, as evidenced by the chamber's success in improving regulatory frameworks for repurposing malt bagasse as animal feed, fostering productive integration between beer-producing and cattle-rearing territories.

An analysis of CSC's operational dynamics suggests that, thus far, it has functioned in line with its objectives and foundational principles. While disputes over representation and sector-specific agendas persist, there is also evidence of consensus-building and protective measures for the industry, demonstrating that agreements are well-established. However, deep-rooted structural conflicts could undermine these sector-wide and territorial negotiations.

Notably, the chamber facilitated closer collaboration among members, prioritizing shared interests while setting aside competitive rivalries, as market competition remains a contentious issue with no consensus among parties (Marcusso, 2021). In this context, partnership initiatives emerged, such as the creation of a quality management program for breweries, marking an unprecedented alliance between large and small producers to enhance beer quality in Brazil.

Thus, it is evident that CSC's existence is beneficial for both the sector and its associated territories. For small producers, it provides a platform for power-sharing and representation, while for large corporations, it serves as a mechanism for legitimizing collective demands. Lastly, from the perspective of democratic tripartite territorial governance, one conclusion stands clear: flawed as it may be, the beer chamber is far better than having none. ●

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