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Measuring the maturity of the basket of territorial goods and services: evidence from Southern Brazil

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The concept of a Basket of Territorial Goods and Services (BTGS) is a theoretical-methodological approach aimed at identifying and strengthening the unique material and symbolic elements that contribute to sustainable development in rural contexts. The BTGS considers three main axes: the construction of a territorial image, the valorization of local markets, and governance of territorial development initiatives by diverse social actors. Although the theoretical literature on BTGS has advanced in recent years, the lack of standardized empirical indicators has limited the ability of the BTGS framework to be used in longer-term and comparative monitoring and assessment programs related to sustainable rural and economic development. This study developed and tested an indicator panel for assessing the level of maturity of the BTGS in Southern Brazil. Since the 1990s, the Rural Credit Cooperative of Seara (Crediseara), has implemented a collective action project to enhance the recognition and value of the region's environmental, cultural, landscape, and productive attributes. We piloted the BTGS indicator panel using a participatory approach with 14 civil society organizations, cooperatives, and public institutions. The results indicate a BTGS at a moderate stage of maturity, with Crediseara and the Family Agriculture Forum standing out as important regional governance hubs for rural development. Significant challenges were also identified, such as Indigenous voices being underrepresented in shaping local strategies and the limited collaboration between public policies and local initiatives. The study reinforces the importance of social participation in building sustainable territorial development processes and proposes the BTGS Panel as a strategic tool for planning, monitoring, and political dialogue. The research contributes to Sustainable Development Goal (SDG) 17, particularly target 17.16, by strengthening collaborative models of evaluation and multisectoral governance.

KEYWORDS

Crediseara, governance system, monitoring indicators, sustainable territorial development, territorial governance

1 Introduction

Global food systems, despite increasing food availability and market access, also perpetuate socioeconomic and environmental inequalities that compromise the sustainability of rural territories (Grisa, 2022). When based on large-scale industrial and agro-industrial models, these systems prioritize productive specialization, intensive use of chemical inputs, and the standardization of processes and products, leading to soil and ecosystem degradation, biodiversity erosion, and the systematic exclusion of family farmers and traditional peoples (Grisa, 2022; IPES, 2016). Additionally, they concentrate political and economic power in few actors, weakening territorial governance mechanisms and limiting the equitable distribution of benefits along productive chains (Requier-Desjardins, 2010; Rastoin, 2015).

In response to these challenges, alternative approaches emerged in the late 1980s, valuing regionalization, diversity, and sustainability of food systems. Models such as Localized Agri-Food Systems (LAFS) and Territorialized Agri-Food Systems (TAFS) highlight the importance of geographic, social, and institutional proximity among food system actors, promoting fairer and more resilient agri-food chains (Requier-Desjardins, 2010; Rastoin, 2015; Schneider and Ferrari, 2015). These initiatives not only strengthen identity and promote the recognition of regional resources but also align with the principles of Sustainable Territorial Development. This approach involves the coordinated and multi-stakeholder integration of social, economic, cultural, and environmental resources of a territory to enhance wellbeing, resilience, and territorial identity while avoiding ecological degradation and social inequality (Amartaya, 1993; Pecqueur, 2005; Vieira, 2009; Denardin et al., 2022).

In this context, the Basket of Territorial Goods and Services (BTGS) is a theoretical-methodological approach that has gained increasing relevance for analyzing processes of Sustainable Territorial Development, particularly in rural spaces with actors excluded from hegemonic development dynamics. Conceived in France in the 2000s by researchers Pecqueur (2001) and Mollard (2001), the approach seeks to understand how a combination of goods and services specific to a territory, along with sociocultural, landscape, and economic aspects, can contribute to the sustainability and resilience of rural territories. In recent years, the BTGS framework has been expanded and adapted to new empirical and theoretical contexts, reinforcing its applicability and analytical potential. For example, research on Geographical Indications (GI) illustrates how locally rooted resources and knowledge can generate products and experiences that embody the identity and values of the territory (Milano and Cazella, 2022). BTGS is an analytical tool expanding on the GI literature, going beyond a product specific-approach to consider positive environmental, social, and historical externalities, such as landscapes, biodiversity, cultural heritage, and know-how (Denardin et al., 2022; Pecqueur, 2001; Hirczak et al., 2008; Capellesso et al., 2022). The BTGS also has the potential to assess progress toward Sustainable Development Goal (SDG) 17 “Partnerships and Means of Implementation”, particularly target 17.16, which aims to strengthen partnerships for sustainable development through the mobilization and sharing of knowledge, expertise, technology, and financial resources.

This indicator assesses progress in the effectiveness of multi-stakeholder monitoring frameworks, strengthening participatory and collaborative governance to achieve SDGs in local and national contexts, which align strongly with the BTGS framework.

Based on studies conducted in different regions such as the Baronnies Provençales, several French researchers structured the BTGS analysis model with interconnected components (Hirczak et al., 2008; Campagne and Pecqueur, 2014). This model allows the identification of present, absent, or dormant elements, aiding in understanding territorial dynamics and developing strategies for their consolidation (Mollard, 2001; Hirczak et al., 2008; Turnes et al., 2022). These elements include:

- i) Supply of complementary goods and services with a common territorial origin, characterized by high quality and specific production methods, such as territorial gastronomy and tourism;
- ii) Public goods that embody territorial quality such as landscapes, biodiversity, cultural heritage, and traditions that reinforce the BTGS identity;
- iii) Territorial governance system involving a network of actors responsible for coordinating the development and promotion of locally-branded agricultural activities, goods and services. This “value added” component of the BTGS refers to collective value or premium derived from the reputation, quality, positive externalities of the territory and identity associated with local goods and services (*rente de qualité territoriale* in the original French framework) and
- iv) Specific territorial goods and services that generate inelastic demand difficult to replace with generic alternatives.

To record and evaluate these components, a territorial analysis diagram was composed of two axes: the horizontal axis represents the governance system and the vertical axis encompasses the provision of high-quality private and public goods and services, as well as the territorial scenario, such as landscape, climate, and relief. Although this tool represented an important theoretical and methodological synthesis, its empirical use revealed significant limitations, such as the difficulty in comparing different territories, the impossibility of monitoring changes over time, and insufficient detail of the components integrating the basket (Cazella et al., 2020).

Facing these limitations, researchers from the Laboratory for Studies on Agricultural Multifunctionality and Territory at the Federal University of Santa Catarina (LEMATE/UFSC) and partner organizations developed an Indicator Panel to monitor BTGS implementation (Turnes et al., 2022). This panel represents a relevant methodological improvement, enabling more precise systematization and analysis of BTGS components, allowing both technical evaluations conducted by researchers and participatory diagnostics carried out with territorial social actors.

Its application makes it possible to identify a territory’s strengths, measure how BTGS components are being incorporated into regional governance processes and dynamics and track the evolution of development processes over time. Beyond its evaluative function, the Indicator Panel plays a strategic role in strengthening the BTGS approach by encouraging the active

participation of social actors and providing inputs for territorial decision-making. In contexts marked by limited social participation and lack of understanding of territorial development processes, these conditions help explain the low level of BTGS adoption (Cazella et al., 2020), and highlight the relevance of the Panel as a capacity-building tool. By promoting a critical perspective on territorial dynamics, the panel contributes to improving strategies for valorizing territorial resources and implementing policies aimed at sustainable development. This study reports on the first field application of the Indicator Panel, validating the tool and analyzing its applicability in concrete and complex rural development contexts. This validation advances the BTGS approach by enhancing its analytical precision and supporting its transformation into an operational tool for territorial governance and decision-making.

We tested the panel in the territory of the Rural Credit Cooperative of Seara (Crediseara), located in the southern region of Brazil and the western part of Santa Catarina state. Situated in a region with a strong presence of family farming and significant activity of agro-industrial conglomerates, the Crediseara territory expresses a hybrid and tense scenario where different development models compete for space and legitimacy. The Cooperative, created in the 1990s by civil society organizations supporting family farming as well as researchers from the Federal University of Santa Catarina, established itself as a reference in solidarity finance, agroecology, and collective organization, articulating practices that strengthen the family farming economy and territorial circuits of valorization (Giombelli et al., 2022c).

This study, by conducting the first test of the BTGS Indicator Panel, seeks to provide inputs for strengthening sustainable territorial development strategies based on valuing endogenous resources and the active participation of territorial actors. In this context, the general objective of this study is to evaluate the maturity level of the Basket of Territorial Goods and Services in the territory of the Rural Credit Cooperative of Seara (Crediseara). In what follows, we (i) characterize the Crediseara's territory of operation, emphasizing its historical trajectory, counter-hegemonic rural development experiences, and the potential for BTGS consolidation; (ii) cap the main social and institutional actors involved in these experiences, analyzing their interactions, roles, and contributions to territorial governance; (iii) refine and field-test the new version of the Indicator Panel, based on the perspectives of different participant groups engaged in sustainable territorial development actions.

2 Methodology

The research was conducted between July 2022 and October 2023, involving semi-structured interviews with representatives of social organizations, public institutions, and cooperatives active in the territory, as well as participatory workshops for testing and validating the indicators. We conducted the research in partnership with directors and technical advisors of Crediseara, whose active participation involved contextualizing the territory and mapping key actors and conducting interviews.

This methodological strategy enabled the refinement of the evaluation tool and fostered the engagement of territorial actors in the collective knowledge-building process. By contributing to the improvement of participatory evaluation instruments and the strengthening of territorialized approaches to sustainable rural development, this study seeks to expand the understanding of the conditions for the emergence, consolidation, and institutionalization of territorial valorization processes guided by the BTGS approach. At the same time, it aims to provide inputs for designing more integrated public policies, sensitive to territorial specificities and committed to the sustainability of Brazilian rural territories.

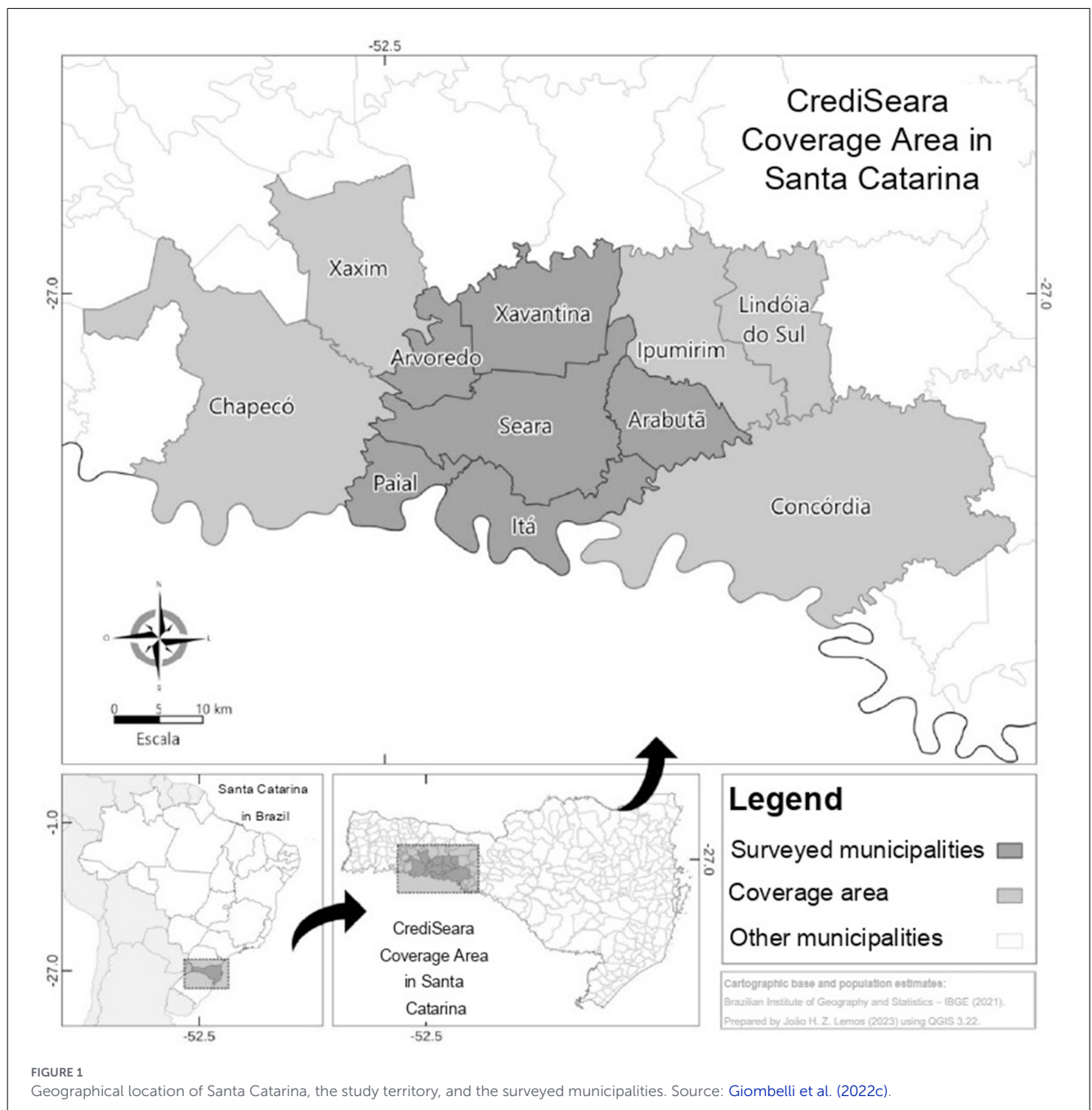
The research was structured into three main stages: characterization of the territory, mapping of key actors, and review and field application of a version of the BTGS Indicator Panel (see [Supplementary material](#)). Semi-structured interviews were conducted with different types of territorial actors, aiming to assess the three main dimensions of the BTGS approach: the provision of regionally specific goods and services, the provision of public goods that embody territorial quality and services, and the maturity of a territorial governance system. The field research allowed direct contact with territorial actors, promoting a deeper understanding of Sustainable Territorial Development dynamics.

2.1 Site description

The study territory in western Santa Catarina has a history marked by the historical presence of the Kaingang people since 5,500 B.C., followed by the establishment of a mixed-race population of white, Indigenous, and African descendants in the late 19th century after the arrival of European settlers. The latter consolidated family farming as the productive base of the region, later driving the emergence of large poultry and pork agro-industries, such as JBS, BRF, and Aurora Alimentos, which continue to dominate the local economy (Giombelli et al., 2022c; Dorigon and Renk, 2018; Tecchio and Cazella, 2021).

Agricultural modernization imposed by these companies favored production concentration among better-capitalized family farmers of European descent, while marginalizing less capitalized family farmers from the same group, as well as Indigenous and mixed-race populations—the poorest groups in western Santa Catarina (Tecchio et al., 2020). In response, families from these groups organized into social movements in the 1990s, notably the Landless Workers' Movement (MST), the Peasant Women's Movement (MMC), the Movement of People Affected by Dams (MAB), and the movement to renew rural unionism, resulting in the Association of Small Farmers of Western Santa Catarina (APACO) and the Family Agriculture Union (Sintraf), affiliated with the Federation of Family Agriculture Workers (FETRAF). These movements have sought to construct alternative rural development models guided by sustainability values (Vieira, 2009; Giombelli et al., 2022c), resulting in the coexistence of different food systems often in tension with large companies' interests.

Created in 1994 by civil society organizations, Federal University of Santa Catarina researchers, and family farming organizations, the Rural Credit Cooperative of Seara (Crediseara)



began operations in 1995 to facilitate farmers’ access to financial markets and promote sustainable rural development (Giombelli et al., 2022a,b). Its operational territory covers 11 municipalities (Figure 1), with service points in Arabutã, Arvoredo, Itá, and Paial, with headquarters in Seara. Xavantina was included in 2006 with the creation of the Union of Family Agriculture Workers of Seara and Region, supported by the Cooperative (Giombelli et al., 2022c).

This research focuses on six municipalities (Seara, Xavantina, Arabutã, Arvoredo, Itá, and Paial) (Figure 1) totaling about 38,000 inhabitants, with Seara the most populous at 18,500 inhabitants (IBGE, 2022). The territory is close to regional hub cities like Concórdia (81,646 inhabitants) and Chapecó (254,785 inhabitants), which have greater urban infrastructure. Crediseara’s membership exceeds 7,000 people, mostly family farmers, but with recent

growth in urban workers, including migrants from the Northeast, Venezuela, and Haiti, attracted by jobs in large agro-industries (Giombelli et al., 2022c).

2.2 Actor mapping

To map the main actors participating in collective actions related to BTGS components, we selected key actors from a network formed by groups historically excluded from hegemonic agriculture. This network configures the “abstract territory” conceptualized by Pecqueur (2024), corresponding to a relational space that transcends geographic boundaries, uniting actors and resources for sustainable development. Our partnership with

Crediseara supported the identification of representatives of the three categories of the territorial governance system: public, private, and civil society. According to [Campagne and Pecqueur \(2014\)](#), private actors produce and valorize territorial resources, public actors manage policies and offer indirect support, and civil society actors connect territorial demands to public policies.

Fourteen actors were selected: eight from civil society, three private sector actors, and three public sector actors. Ten reside in Seara and four in other municipalities (Paial, Arvoredo, Xavantina e Concórdia). [Table 1](#) describes the institutional affiliations of territorial actors that were interviewed. Some actors play multiple roles in different organizations, highlighting the interconnection of distinct initiatives and the complexity of territorial governance. This diversity ensured a broad view of territorial dynamics and BTGS implementation. Initial participant selection was generated from Crediseara’s existing relationships in the community and further triangulated with contacts from previous research by members of the research team, participant observation at regional food and agricultural events with diverse stakeholders, and suggestions from interviewees themselves. The private sector actor sample was intentionally focused on capturing key territorial stakeholders, which limits generalization but provides in-depth insight into local interactions. Additionally, some interviewees held dual roles within different civil society organizations, which may have influenced their responses by reflecting overlapping or combined perspectives rather than fully independent views on territorial interactions.

2.3 Update and application of the indicator panel

The “Indicator Panel for Monitoring the Implementation of a Basket of Territorial Goods and Services,” conceived by [Turnes et al. \(2022\)](#), is based on an earlier conceptual framework for assessing Sustainable Territorial Development in rural areas. Its indicators were derived from empirical research that directly analyzed the BTGS components in France and in several territories of Santa Catarina, Brazil, identifying the specific goods, services, and governance elements present in each territory. The panel is grounded in the Delos Methodology ([Turnes, 2004, 2019](#)), a participatory approach in which indicators are constructed through the systematic exchange of information among actors involved in social and territorial processes, aiming to support the co-construction of knowledge and sustainable territorial development. While this first version provided a structured framework, refinements were needed to improve clarity and applicability, including the creation of metadata sheets for each indicator.

In this study stage, the original BTGS Panel was first reviewed and subsequently revised before being field-tested to assess the maturity of its three components: public goods and services that embody territorial quality, high-quality private goods and services, and territorial governance. Two collaborative workshops, held in July and September 2022, brought together experienced researchers to review the original Panel’s dimensions, descriptors, and indicators. The first, with

TABLE 1 Institutional affiliations of interviewed territorial actors.

| Civil society actors |
|--|
| Rural Tourism Route “Flavors and Knowledge in the Valley of Butterflies”: Conceived in 2016, the route includes visits to agroecological establishments and performances in a rural theater. |
| Pastoral Youth Ministry of Seara: The ministry brings together Catholic youth who engage in educational activities and political discussions, based on Liberation Theology. This doctrine inspired many rural social movements that emerged in Brazil and in the region from the 1980s onward. |
| National Association of Phytotherapists, Psychoanalysts and Producers of Popular, Traditional and Cultural Flower Essences of Brazil (ANAFIP): Founded in 2018, the association is national in scope, headquartered in Seara due to initiatives promoted in the municipality through alternative therapy courses offered by Crediseara. Its purpose is to disseminate therapies based on medicinal plants, focusing on physical, mental, and emotional health. |
| BambuSol Group: Established in 2012, the group brings together 25 farmers who grow bamboo used for handicrafts, furniture, construction, and food. |
| Association of Small Farmers of Western Santa Catarina (APACO): Created in 1989 in the municipality of Chapecó. Its initial purpose was to formulate and disseminate new productive alternatives for family farmers excluded from the main livestock production chains, with a focus on different forms of cooperation. It played a key role in establishing a statewide network of NGOs that supported the creation of rural credit cooperatives among family farmers in the early 1980s. Crediseara was one such cooperative. |
| Slow Food “Colonial Cheese Fortress”: Created in 2017 with the purpose of organizing raw milk cheese producers. The idea is to preserve and enhance the know-how of farming families producing this type of cheese for self-consumption and sale, combined with innovative management practices to generate greater socioeconomic stability and sanitary and environmental guarantees for family production units. |
| Union of Family Farming Workers of Seara and Region (SINTRAF): Covers the municipalities of Seara, Itá, Paial, and Xavantina and represents a group of family farmers who did not feel represented by the existing rural workers’ union. |
| Seara Rural Credit Cooperative (Crediseara): Founded in 1994 with support from APACO, aiming to increase access to financial resources and services and encourage various forms of cooperation, thus fostering new productive and commercial experiences among members and supporting the construction of projects that promote rural territorial development. |
| Private Actors |
| Smallholder farmer |
| Artisanal baker |
| Colonial cheese producer |
| Public Sector Actors |
| Paial Municipal Government |
| Federal Institute of Santa Catarina (IFC) – Concórdia campus |
| Santa Catarina Agricultural Research and Rural Extension Company (EPAGRI) – Seara regional office |

five researchers, analyzed aspects such as topic delimitation, dimension and indicator definitions, and measurement scales. The second workshop, organized remotely with fifteen participants, including researchers and civil society groups, consolidated suggestions, resulting in the addition and removal of indicators to eliminate redundancies and broaden the scope of the revised Panel.

Some indicators were removed, such as “Complementary goods that can be replaced by generic goods” due to measurement difficulties, and redundant descriptors related to the supply and demand of territorial quality products and services. Indicators on the recognition of traditional peoples, the influence of edaphoclimatic conditions, and the relevance of public policies were added, making the Panel more comprehensive. After revisions, the Panel included 36 indicators, reflecting territorial specificities and governance dynamics. The formulation of metadata sheets for each indicator allowed constructing parameters to reduce misunderstandings among interviewees and greater consistency in the Panel’s application. These sheets include detailed descriptions and an adapted Likert Scale, avoiding ambiguities by representing indicator maturity levels on a gradient from 1 to 5 (see [Supplementary material](#)).

In the application stage, 14 semi-structured interviews were conducted in person and remotely with territorial actors, averaging 1 h each, and the collected data were recorded and transcribed. During the interviews, in which each indicator corresponded to a specific interview question, participants were asked to evaluate each indicator according to their perception of its level of implementation and to provide qualitative explanations or examples. This allowed the Panel to be completed in real time, using a deductive approach, based on the participant’s responses. This process facilitated a mixed-methods assessment in which the quantitative maturity indices were complemented by qualitative insights to contextualize the development of BTGS components in the territory.

The BTGS maturity indices were calculated directly from the responses to the Indicator Panel. For each dimension, the scores of the relevant indicators were averaged to produce indices, and the overall BTGS maturity index was obtained as the average of the three dimension indices. For this study, a new version of the Territorial Analysis Diagram was created to visualize the results; the diagram shown in [Figure 2](#) represents the original version for reference purposes.

Finally, the data were validated through an expert review process involving researchers specialized in Sustainable Territorial Development and BTGS with prior experience in the study area, together with knowledgeable local stakeholders. The validation consisted of cross-checking data consistency and alignment with observed territorial dynamics.

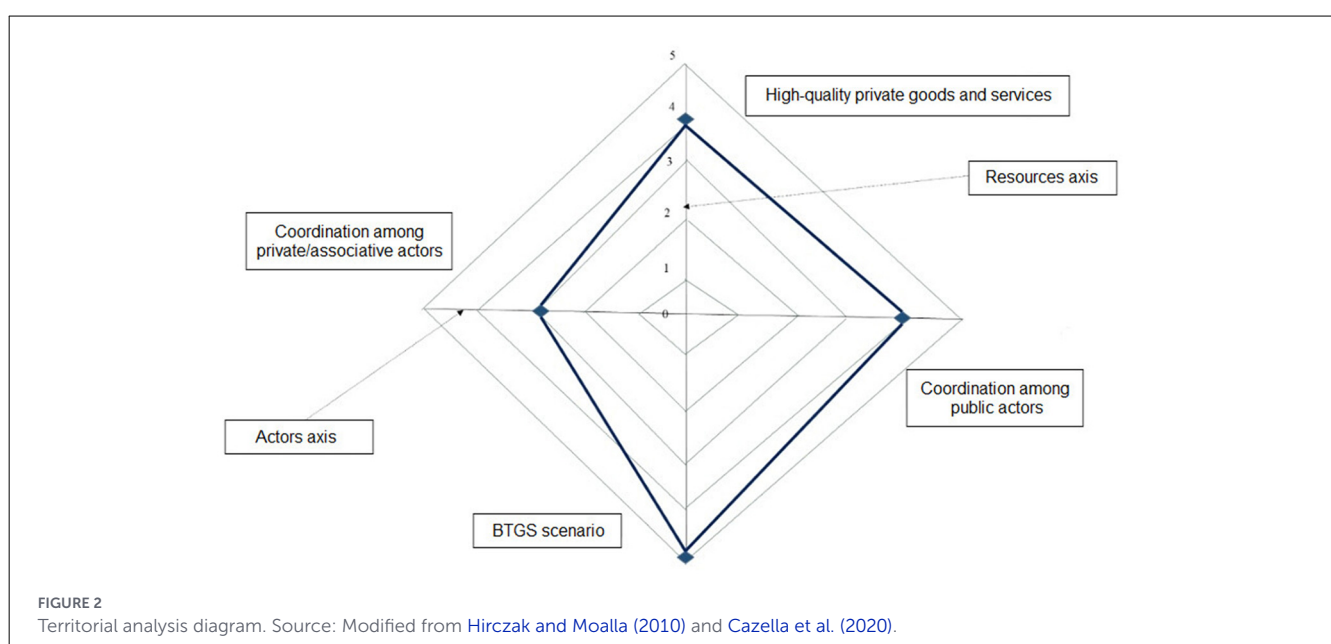
3 Results and discussion

3.1 Characterization of the territory and institutional context

Information regarding Crediseara’s institutional profile and membership dynamics was obtained through a review of secondary literature and complemented by participant observation conducted during field activities.

In the BTGS context, the Crediseara territory is conceived as an abstract territory, constructed from social interactions and collective organizations in addition to ecological and biophysical characteristics. Unlike a territory delimited solely by geographic parameters, it is structured based on cooperation and the valorization of territorial resources to address challenges shared by social actor collectives ([Cazella et al., 2020](#); [Glon and Pecqueur, 2006](#); [Pecqueur, 2006](#); [Kato et al., 2022](#); [Hirczak et al., 2022](#)).

Since its creation, Crediseara has acted as an institutional countermovement, promoting short commercialization circuits



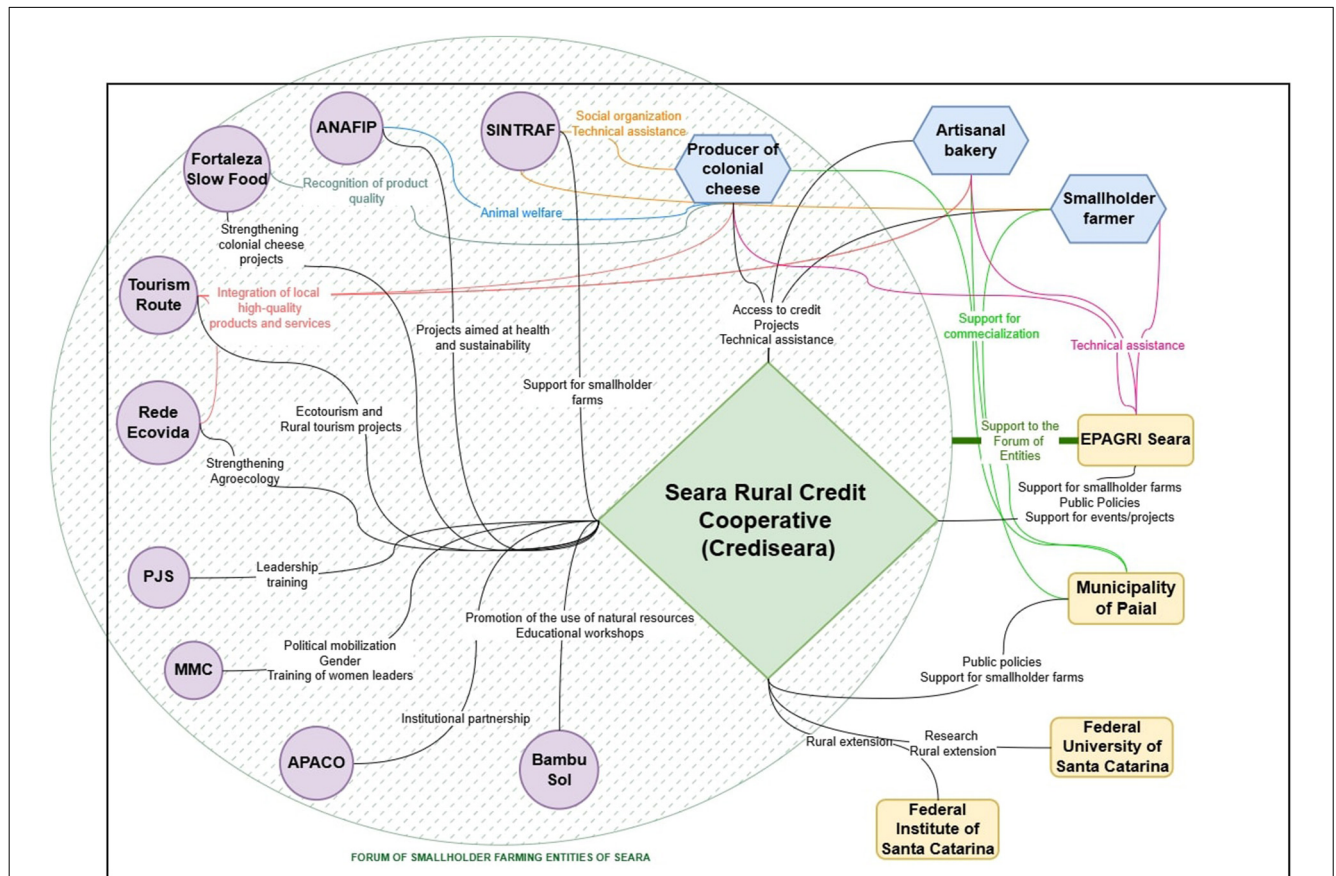


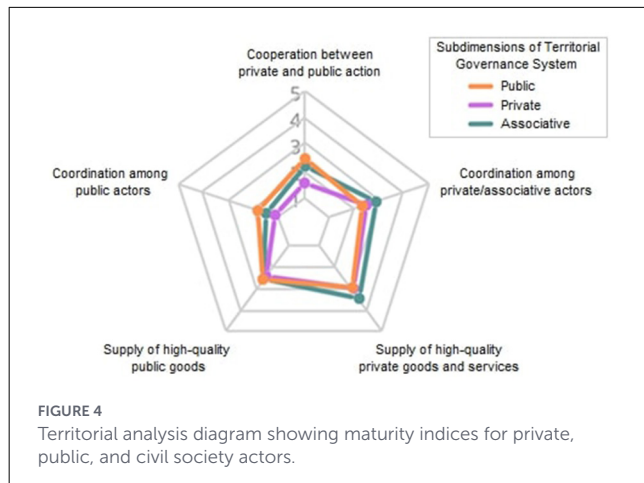
FIGURE 3 Mapping the actors in the Seara Rural Credit Cooperative's Territory and their relationships.

and technical assistance for families excluded from intensive production systems. Its main initiatives include rural credit access through the National Program for the Strengthening of Family Agriculture (Pronaf), the Colonial House and fairs for product commercialization, and implementation of the Municipal Inspection System (MIS) for animal-origin products processed in small family agro-industries. The Cooperative also drives sustainable practices, such as organic and agroecological inputs and social technologies, strengthening territorial identity and expanding economic opportunities (Giombelli et al., 2022c; Tecchio et al., 2022a).

Crediseara articulates a network of decentralized cooperatives, unions, and family agro-industries to strengthen short commercialization circuits and natural resource preservation. Its activities include campaigns like Green September on healthy eating and the promotion of agroecological practices. In 2008, Crediseara led the creation of the Forum of Family Agriculture Entities, bringing together nineteen social organizations and coordinating territorial governance strategies aimed at sustainable development (Giombelli et al., 2022c). For almost two decades, the Forum has played a central role in articulating demands and constructing collective solutions, promoting cooperation among public, private, and civil society actors. In the Crediseara territory, territorial governance is driven by civil society, which

assumes unique protagonism in implementing strategies such as the coordination of farmers market and training programs for family farmers, and the promotion of traditional cheese production and artisanal handicrafts (Giombelli et al., 2022a). These initiatives leverage local specificities and territorial resource valorization, consolidating a sustainable and inclusive development model.

The mapping of key actors revealed the complexity of interactions among public, private, and civil society sectors (Figure 3). Civil society actors play a central role mediating between public policies and private initiatives, connecting territorial demands with access opportunities to public policies. Crediseara stands out as a strategic articulator, promoting actions linked to family farming, rural tourism, and local product valorization, focusing on family agro-industries. Public actors, such as municipalities, technical assistance agencies, and the technical education institute of Concórdia, are fundamental in supporting family farming and sustainable development but face limitations in integrating different government levels. Paial Municipality stood out for greater collaboration, by supporting local markets and cultural events with Crediseara, but overall, the relationship between the cooperative and municipalities is marked by political disputes, limiting municipal government involvement in BTGS implementation. Thus, territorial governance falls primarily on civil society organizations. Private actors, such as colonial cheese



producers and other family farmers processing agri-food products, strengthen territorial identity by preserving traditional knowledge and direct commercialization in different territorial market channels. Rural tourism, including visits to cheese factories and tastings, brings consumers closer to local productive culture.

Figure 3 illustrates these connections, with Crediseara at the center, articulating civil society, private, and public actors. Interactions include commercialization support, credit and technical assistance access, and initiatives for local product valorization and leadership training. The Forum of Family Agriculture Entities plays a key role in territorial governance, promoting interfaces with the urban population on healthy eating. The diagram aims to show the interdependence among the various segments composing the territorial governance system, by showing each category's role in constructing and implementing the BTGS.

3.2 Application of the indicator panel to evaluate the basket of territorial goods and services

To assess the maturity level of the Basket of Territorial Goods and Services in the Crediseara territory, maturity indices for dimensions and sub-dimensions were calculated based on interviewed actors' perceptions regarding BTGS component development levels. The overall Maturity Index (MI) was 2.7, indicating moderate BTGS maturity in the Crediseara territory. This result is consistent with the literature that characterizes BTGS consolidation as a gradual, non-linear process dependent on governance capacity and actor coordination (Pecqueur, 2001; Mollard, 2001).

The territorial analysis diagram (Figure 4) offers a comparative view among dimensions and evaluated actor groups, showing that while civil society actors have more positive perceptions across various dimensions, private sector actors express more critical views, especially regarding territorial governance. All three actor categories recognize the supply of high-quality private goods but identify challenges in internal coordination of public actors and articulation with other sectors.

The analysis revealed variations in BTGS maturity perceptions among different actor types. As shown in Figure 4, for "supply of high-quality private goods and services" (e.g. food products) civil society actors' perceptions were closest to the maximum index (5), with 3.52, followed by private actors (3.08) and public actors (3.04). This suggests that actors, regardless of category, recognize high quality levels in these goods and services. Regarding perceptions of the "supply of public goods that embody territorial quality," (for example, agritourism routes, cultural events, landscapes) public sector participants had the highest score (2.61), while civil society (2.59) and private sector actors (2.44) presented slightly lower perceptions. The value indicates the need to strengthen public services aimed at promoting the recognition of territorial resources.

In the sub-dimensions of territorial governance system, "Coordination between private and civil society actors" was perceived more positively by civil society (2.95) and private actors (2.67), while public actors (2.42) had perceptions closer to average (2.5). In contrast, "Coordination among public actors" received the lowest scores, perceived more critically by private (1.13) and civil society actors (1.49). "Cooperation between private and public action" showed intermediate scores, with public actors rating it highest (2.40), followed by civil society (2.26) and private actors (1.73).

These results highlight ongoing challenges in integrating different social segments and aligning public policies with local initiatives. In fact, previous research in the same territory corroborates these findings: Giombelli et al. (2022a) show that civil society, public, and private actors hold differing perceptions regarding coordination and decision-making processes in territorial governance. Similarly, Milano and Cazella (2022) emphasize that actors' perceptions and priorities vary according to their position and function within governance structures, reinforcing the idea that diverse perspectives among social groups strongly shape the dynamics and effectiveness of territorial governance. Together, these studies underscore the importance of considering multiple actor viewpoints when assessing BTGS maturity and implementing policies to strengthen territorial coordination.

3.3 Supply of quality goods and services

The BTGS brings together products that combine sensory characteristics with symbolic attributes, reinforcing their territorial connection. Rooted in local culture and history, these products depend on territorial characteristics and traditional know-how. Their consumption and valorization are driven by structuring services, such as tourism and gastronomy, which articulate specific territorial resources and enrich consumer experiences (Hirczak et al., 2008). The Forum of Entities and Crediseara's actions play relevant roles in promoting the recognition of these resources, contributing to dialogue, production, commercialization, and incentive processes at the territorial scale. These initiatives strengthen and diversify territorial products and services, highlighting the importance of strategies connecting producers and consumers while promoting territorial attribute recognition (Giombelli et al., 2022a).

“Supply of high-quality private goods and services” obtained an index of 3.29, indicating a moderate level of territorial resources. According to the interviews, BGTS components are connected but do not yet work in full coordination; there are up to ten specific products and services, including knowledge of up to five distinctive local goods and associated visitor services. These results show that although high-quality products and services are recognized for their value, challenges remain in expanding visibility and strengthening networks. This scenario reinforces the need for integrated strategies promoting complementarity among products and services, ensuring not only their maintenance but also market expansion and territorial identity anchoring.

Among examples of specific goods and services with valorization potential identified in the territory, agroecological production (Nerling and De Abreu, 2007), bamboo (Tecchio et al., 2022a), raw milk cheese (Carvalho et al., 2016), and pork products stand out. Interviewees emphasized product and service diversity’s importance in constructing strong territorial identity. Reports indicate that valorizing traditional know-how and product quality are central elements for differentiation and supply competitiveness:

Our family holds a fair at Unochapecó [public-private university] and a regional fair. There, we sell pastries made on the spot. People might say, ‘All pastries are the same.’ But we highlight our grandmother’s recipe. My grandmother learned it from her mother, my great-grandmother. And my mother adapted it, but this recipe has been in our family for at least 90 years. It’s a know-how. (Civil society actor interviewee n° 2)

Rural tourism also appears as an important resource operator, connecting visitors to local products and contributing to their valorization. Despite the territory’s touristic potential, the indicator related to regional tourist route existence presented the lowest results within this dimension, evidencing the absence of an integrated route connecting different municipalities. Although Seara and Itá municipalities have tourist attractions (Giombelli et al., 2022a; Ferreira and Bernardy, 2018; Tumelero, 2022), there is no articulation among actors to create a regional tourist route. Rural and ecotourism, which could be alternative income sources for farming families, are not explored in an integrated manner (Bosetti and Oliveira, 2016). Creating a regional tourist route by private and civil society actors, with public support, could valorize rural families’ way of life, traditional knowledge, and artisanal practices, promoting gastronomic and cultural traditions often threatened by oblivion. Additionally, the diversity of territorial resources, including preserved cultural and landscape heritage, offers opportunities to consolidate an integrated supply of local and rural goods and services, strengthening sustainable territorial development (Cardoso, 2002; Blanco, 2004).

... what we call rural tourism, but behind it, there’s much more than just receiving a tourist, having them experience something and leave. [...] It’s not just a simple itinerary, not just a simple route. Not that we do this on purpose, but it’s in our nature to make people who interact with us take away more than just an informative product, but something that

can actually impact their lives, in a way that redefines or makes them look at agriculture with different eyes. I see that these experiences can also be a product. (Civil society actor interviewee n°5)

Public goods that embody territorial quality, such as environmental amenities, landscapes, biodiversity, heritage, architecture, history, culture, and traditions play a central role in territorial valorization because they shape the context in which supply and demand interact. These elements condition territorial development sustainability by generating positive externalities (Hirczak et al., 2008).

“Supply of Public Goods that Embody Territorial Quality” obtained an average index of 2.56. The best-evaluated indicators within this dimension were those related to architectural heritage associated with local identity, the valorization of history and traditions, and territorial landscape, such as mountainous relief, a striking feature directly influencing sectors like agriculture and tourism.

Besides landscape, architectural heritage, history, and local traditions continue to be valued, manifesting in typical festivals, cultural events, and cuisine influenced by Italian and German heritages. Interviewees highlighted the presence of cultural spaces and traditional events contributing to territorial identity. The Fritz Plaumann Museum, considered the largest entomology museum in Latin America, and the House of Culture were mentioned as significant local heritage elements.

Additionally, typical festivals represent a space for maintaining and celebrating local culture.

There’s the Cuca Festival, the Italian Group, German Dance, the Elderly Festival... also, in fact, groups. I see, there’s a lot about the Italian Festival. (Public actor interviewee n°3)

Despite the territory’s cultural richness, one of the lowest-scoring indicators in this dimension was the recognition of traditional peoples and communities. The history of colonization and land disputes in western Santa Catarina generated exclusion of indigenous and mixed-race populations, marginalizing their cultures and ways of life (Dorigon and Renk, 2018). The territory is home to the Toldo Pinhal Indigenous Land, where 644 Kaingang people live (IBGE, 2022), and communities of mixed-race origin preserving unique cultural expressions. However, sustainable territorial development actions reach these populations less (Cazella, 2006), resulting in the invisibilization of their cultural practices and traditional knowledge. One interviewee reported how this marginalization persists:

Look, what I see is that this indigenous area was a region where... there were residents, farmers, who lived there, and then there was a dispute. A dispute, the indigenous people proved it was their land, the farmers were evicted. And then a bad feeling was created. A rivalry between (inaudible) farmers, and to this day, it hasn’t been resolved. (Civil society actor interviewee 6)

Another low-scoring indicator was related to the diversity of collective trademarks and quality seals. Although western Santa Catarina concentrates the largest number of collective trademarks in the state associated with family agro-industries, interviewees did not identify significant diversity of specific initiatives in the territory. Currently, the “Sabor Colonial” collective trademark is used by about 130 family agro-industries processing diverse products like meat derivatives, eggs, cereals, jams, honey, and sugarcane-based items (Tecchio et al., 2022b; Cazella et al., 2024; Ramos et al., 2024).

According to the Brazilian National Institute of Industrial Property (INPI), a collective trademark is intended to identify and distinguish products or services originating from members of a legal entity that represents a collective group. Its main purpose is to indicate to consumers that the product or service comes from members of a specific organization [Instituto Nacional da Propriedade Industrial (INPI, 2022)]. Unlike Geographical Indications (GIs), which are formal state recognitions linked to a specific territory, collective trademarks are often locally developed and managed by producer associations or cooperatives. Their establishment enables small producers to join efforts, strengthen market competitiveness, and promote a shared identity of origin, aspects that signal processes of territorial development (Souza et al., 2019). Literature highlights that collective trademarks are fundamental for valorizing territorial identity, as they highlight attributes like origin, know-how, and differentiated production methods (Ramos et al., 2024). The low score of this indicator reflects a fragility in structuring the BTGS but also points to opportunities. Strengthening collective trademarks could bring benefits like access to new markets, protection against competition, and expansion of territorial identity (Tecchio et al., 2022b; Barbosa et al., 2015).

3.4 Territorial governance system

In the interviewees’ evaluation, this dimension obtained the lowest index among those analyzed, with an average value of 2.15. This evidences structural challenges in collaborative territory management and points to the need for improving coordination of policies and actions among different involved agents involved in sustainable development projects. Considering that territorial governance, as a central element for BTGS constitution (Hirczak et al., 2008), transversally impacts other BTGS components, its strengthening can generate positive effects in other dimensions of sustainable territorial development.

The number and diversity of products and services composing the BTGS depend largely on private and civil society actors’ actions. These groups play an essential role in constructing territorial identity, ensuring that goods supply authentically represents local characteristics and promoting complementary quality products. Additionally, collaboration among these actors strengthens BTGS competitiveness against external markets, avoiding exclusion of local productive initiatives (Hirczak et al., 2008).

Among analyzed sub-dimensions, coordination between private and civil society actors presented the highest index, with scores above average (>2.5) for indicators related to these actors’

involvement level, mutual trust, cooperation, and coherence of BTGS perceptions. This performance reflects the central role of associations and cooperatives in territorial articulation and quality services promotion. Interviewees highlighted the importance of collaboration among productive groups and local organizations.

The Forum of Family Agriculture Entities of Seara has been a mobilization space, promoting joint actions among producers, service providers, and consumers.

However, its action is still predominantly municipal, in Seara, which limits its articulation at a broader territorial level and may have impacted this dimension’s overall score (Giombelli et al., 2022a). Despite the coordination capacity demonstrated by these groups, some tensions and challenges persist, like fragmentation among cooperatives and difficulty in establishing broader connections among different productive sectors. Strengthening these relationships and expanding governance beyond municipal boundaries are aspects conditioning greater incidence of sustainable territorial development precepts.

The public sector’s action is essential to mediate divergent interests among private actors and ensure the structuring of policies aimed at sustainable territorial development. The public sector has greater intervention capacity in procedures defining coherent territorial and sectoral scales for quality seals and designations of origin, besides contributing to the visibility and accessibility of territorial goods and services. Initiatives like fairs and events, creation of natural parks, and development of thematic routes are some ways public action can strengthen the BTGS (Hirczak et al., 2008).

However, this sub-dimension’s evaluation revealed the lowest indices among the three coordination types analyzed. This result evidences the absence of public policies aimed at strengthening territorial products and services, as well as the lack of public decision spaces incorporating BTGS principles. The lack of consistent institutional articulation compromises the necessary synergy to drive integrated sustainable territorial development.

The difficulty in coordinating among municipal and state public sectors was one of the main challenges pointed out. Although some public organizations actively participate in promoting Sustainable Territorial Development, this dynamic doesn’t occur in all municipalities of the studied territory. The lack of involvement from various municipal governments and rural technical assistance and extension service units compromises the consolidation of broader and articulated territorial governance (Giombelli et al., 2022a,b).

The following testimonies reinforce this perception:

Tourism is something we’re also exploring, learning to do, doing. Initially, we had a partnership, an agreement with Sebrae [Brazilian Support Service for Micro and Small Enterprises], but then it didn’t continue. We’ve been developing our property, our business, also participating in the Saberes e Sabores do Vale das Borboletas route, an initiative uniting three families. And it’s up to the farmers. There’s no public sector involved, nothing. And we’ve been doing it, right? Our tourism route isn’t even on the [municipality’s internet] page. (Civil society actor interviewee 5)

Besides the lack of institutional support for local economic and touristic initiatives, there's also a generalized perception that the public sector doesn't sufficiently strengthen actions aimed at sustainable territorial development:

From the State, it's fair to say that... it's very little, right. Activities, actions happen here in the municipality. So, the municipality must create means, alternatives to strengthen, right. [...] The municipal administration must be responsible. It's not party A, B, or C managing, but a management with available resources. (Public actor interviewee 4)

Testimonies evidence fragmented and disarticulated public sector action, reinforcing the need for more integrated strategies. Expanding governance spaces and creating public policies aligned with territorial demands are fundamental aspects to overcome these limitations.

For the Basket of Territorial Goods and Services to effectively contribute to sustainable territorial development, it's essential that public and private actions have minimum coordination. The absence of articulation between these sectors results in isolated initiatives, limiting the necessary synergy to strengthen territorial products and services and expand their socioeconomic impacts (Hirczak et al., 2008).

This sub-dimension's analysis revealed significant discrepancies among different evaluated actor types. Particularly, private actors presented an index of 1.73, well below average, evidencing a generalized perception of low cooperation between public and private sectors. This result reflects the absence of shared and debated objectives in public decision-making spaces, besides the scarcity of initiatives aimed at technical training and strengthening the territory's specific products and services. The low dialogue level among territorial actors from different sectors was one of the most recurring aspects in reports. The perception that there's no joint effort among sectors is reflected in the difficulty of establishing partnerships:

We have nothing in this sense. The construction, well, I think... we'd always like it to be collective. But it's hard when it's only one side. We propose, when the proposal is good for them, fine, otherwise they don't want it. It's hard to build. (Civil society actor interviewee 3)

Besides the lack of articulation, there are structural challenges related to the absence of effective public policies to regulate and foster territorial production and services aimed at promoting Sustainable Territorial Development. The rigidity of sanitary legislation, for example, was pointed out as an obstacle for small producers seeking to add value to their products.

The difficulty in implementing and enforcing local laws reinforces the need for greater articulation among municipal, state, and federal spheres. Although municipalities have some autonomy, the lack of integration among public policies and low participation of different sectors in formulating these policies hinder their applicability. On the other hand, there's recognition that building a sustainable territorial development dynamic

requires collective effort, both from the public sector and civil society:

I believe so, right. It's a necessity, right. People always expect the public sector to give many answers, right. For the public to be active, to be a partner. It's important, right. The survival of entities, the public sector, families, municipalities, is this collective effort, this work. It's no use just, say, an action coming and them crossing their arms. Families not getting involved. So, it depends a lot on people's effort, a collective effort. (Public actor interviewee 4)

Thus, results indicate the need for adjustments in policies and public actions executed at the territorial level, as well as governance mechanisms promoting greater collaboration and integration among territorial actors, especially in the family farming context. Strategies encouraging dialogue and creating participatory spaces can contribute to building a more equitable and sustainable development model (Mior, 2007).

Taken together, the integrated analysis of the three BTGS dimensions reveals a territory in transitional development, where the overall maturity index of 2.7 reflects a paradoxical configuration: strong civil society organization coexisting with fragmented governance structures. While the supply of private quality goods demonstrates the effectiveness of territorial valorization initiatives driven by Crediseara and associated actors, the weaknesses in public goods supply and especially in territorial governance indicate that civil society protagonism alone is insufficient to consolidate a mature and comprehensive BTGS.

This scenario evidences both the potential and structural limitations for sustainable territorial development in contexts where civil society actors assume governance leadership in the absence of effective public-private coordination mechanisms. The patterns observed in the Crediseara territory, where strong civil society initiatives coexist with fragmented public governance, may resonate with other rural regions or territories worldwide that rely on multi-actor governance systems. The Indicator Panel methodology and the insights from BTGS maturity assessment could provide a useful framework for analyzing territorial governance, actor coordination, and resource valorization in comparable contexts, making these findings relevant to policy makers and interdisciplinary researchers interested in sustainable rural development.

4 Conclusion

The study evaluated the maturity of the Basket of Territorial Goods and Services in the Crediseara territory, revealing advancements in resource valorization and territorial governance but also structural challenges limiting its consolidation as a sustainable territorial development strategy. The territorial context analysis highlighted sociocultural diversity and the strong presence of family farming but also evidenced persistent inequalities, especially among indigenous and mixed-race populations, who don't integrate the Sustainable Territorial Development actions

encouraged by Crediseara. Regarding territorial governance, civil society and this Cooperative's protagonism were noted, but fragmentation among public and private actors and the concentration of initiatives in the hub municipality limited the BTGS's territorial expansion. Concerning BTGS components, a diversified supply of high-quality private goods and services was identified, but fragilities in public goods supply, access to certifications, and the structuring of a regional tourist route.

These findings have important practical implications for different territorial actors. For municipal managers, the results suggest the need to create institutionalized public-private dialogue spaces, such as territorial councils that include Crediseara, producers, and public authorities, facilitating coordinated decision-making. Additionally, investing in an integrated regional tourist route could leverage the territorial resources identified in the municipalities. For organizations like Crediseara, the results indicate opportunities to expand supra-municipal articulation by strengthening the Forum beyond Seara's boundaries, develop collective trademarks by expanding "Sabor Colonial" and creating new certifications, and invest in governance capacity building to enhance public-private mediation skills among civil society leaders. As suggestions for future research, expanding interview representativeness, incorporating more robust participatory methodologies, and exploring mechanisms strengthening different actors' integration in territorial planning are recommended. Continuing these investigations may contribute to improving the BTGS as a strategy for sustainable development.

Data availability statement

The raw data supporting the conclusions of this article will be made available by the authors, without undue reservation.

Ethics statement

The studies involving humans were approved by Brazilian Ministry of Health – National Health Council – National Research Ethics Commission (CONEP). The studies were conducted in accordance with the local legislation and institutional requirements. The participants provided their written informed consent to participate in this study. Written informed consent was obtained from the individual(s) for the publication of any potentially identifiable images or data included in this article.

Author contributions

IA: Writing – review & editing, Methodology, Writing – original draft, Investigation, Conceptualization, Visualization, Project administration, Data curation, Formal analysis, Validation. HW: Writing – review & editing, Supervision. PR: Conceptualization, Writing – review & editing. AT: Methodology, Data curation, Validation, Writing – review &

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Conflict of interest

The author(s) declared that this work was conducted in the absence of any commercial or financial relationships that could be construed as a potential conflict of interest.

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Supplementary material

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