






Grassroots initiatives of digital food markets in southern Brazil: the barred window of opportunity for institutional changes opened by the pandemic

Iniciativas populares de mercados alimentares digitais no sul do Brasil: a bloqueada janela de oportunidade para mudanças institucionais aberta pela pandemia

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Abstract: Debates about the effects of covid-19 on the dynamics of food systems abounded in the last years. Initial analyses projected major changes in these dynamics due to, among other things, the digitisation of markets. Based on data collected between 2020 e 2023 by means of direct observations and 64 semi-structured interviews with farmers, rural extensionists, public officials, and community leaders in the scope of a multi-case study, and in dialogue with the sociological literature on institutional change and social construction of markets, this article analyses grassroots initiatives of market digitisation in two regions (Litoral Norte and Médio-Alto Uruguai) of the state of Rio Grande do Sul, Brazil. Findings suggest that the pandemic promoted a barred window of opportunity for social movements' initiatives of alternative food markets. By the end of 2023, half a year after the World Health Organization declared "with great hope" an end to covid-19, it did not seem to be much hope for these initiatives. This is because neither the pandemic proved to be a "critical juncture" that opened the space for significant institutional changes, nor the challenging actors in the field were able to become "institutional entrepreneurs" of these changes.

Keywords: institutional change, food markets, pandemic, social movements, digitisation.

Resumo: Os debates sobre os efeitos da covid-19 na dinâmica dos sistemas alimentares abundaram nos últimos anos. Análises preliminares projetaram mudanças expressivas nesta dinâmica devido, entre outras coisas, à digitalização dos mercados. Com base em dados coletados entre 2020 e 2023 por meio de observação direta e 64 entrevistas semiestruturadas com agricultores, extensionistas rurais, gestores públicos e lideranças sociais no âmbito de um estudo de múltiplos casos, e em diálogo com a literatura sociológica sobre mudança institucional e construção social de mercados, este artigo analisa iniciativas de digitalização de mercados da agricultura familiar em duas regiões (Litoral Norte e Médio-Alto Uruguai) do estado do Rio Grande do Sul, Brasil. As descobertas sugerem que a pandemia promoveu uma janela de oportunidade bloqueada para iniciativas de mercados alimentares alternativos. No final de 2023, meio ano depois a Organização Mundial de Saúde ter declarado "com grande esperança" o fim da covid-19, não parecia haver muita esperança para estas iniciativas. Isto porque nem a pandemia provou ser uma "conjuntura crítica" que abriu espaço para mudanças institucionais significativas nestas regiões, nem os atores desafiantes no campo foram capazes de se tornarem "empreendedores institucionais" destas mudanças.

Palavras-chave: mudança institucional, mercados alimentares, pandemias, movimentos sociais, digitalização.



1. Introduction

The analysis of institutional changes brought about by covid-19 became one of the main global research agendas in several areas (Bentkowska, 2021; Leach et al., 2021; Carducci et al., 2021; Hwang & Höllerer, 2020). Nevertheless, apart from specific areas such as teaching and learning (Ratten, 2023), in May 2023, when the World Health Organization (WHO) declared an end to the pandemic, analyses linking the health crisis to a “critical juncture” capable of redirecting the course of world development became quite uncommon. On the contrary, despite persisting uncertainties about the long-term effects, especially regarding changes in daily practices of individuals, most recent research has pointed out the strength of prior institutional trajectory (path dependence) and, therefore, has defined the pandemic as a “window of opportunity” (McAdam, 1982; Tarrow, 1994) for institutional changes that are more gradual, partial, and limited than anticipated by many (Béné et al., 2021; Knill & Steinebach, 2022).

An area in which discussions on the effects of the pandemic have been most intense concerns the dynamics of agro-food systems (Singulano et al., 2023; Borghesi & Morone, 2023; Preiss et al., 2022; Gliessman & Ferguson, 2021; Chiffolleau et al., 2021; Clapp & Moseley, 2020; Maluf, 2020). Restrictive measures adopted by many countries brought about instabilities in food distribution, acceleration of digitisation, economic concentration, and increased profitability of corporations that control global marketplaces (Gazolla & Aquino, 2022; Hobbs, 2020; Béné, 2020; Schneider et al., 2020; Niederle & Wesz Junior, 2020; Niederle et al., 2021). Although some of these effects are still felt, many doubts remain about their permanence and, above all, their magnitude in the long term. Furthermore, it is still unclear what factors have triggered them, since the health threat intertwined with other global crises (energy, economic, climate, geopolitical, military), thus exacerbating the uncertainties and complexity of institutional change processes and entailing a “more distributed, multi-source view of change” (Geels, 2018).

This article analyses grassroots initiatives of digital food markets that were created or expanded in response to covid-19 in two regions (Litoral Norte and Médio-Alto Uruguai) of the state of Rio Grande do Sul, Brazil. The analysis is based on a multi-case study carried out between May 2020 and December 2023. The systematic observation of five cases (Fitt Delivery, Rede de Orgânicos, Quitandeiros, Alimentos de Origem and Produtos do Sítio) revealed that, at first, when more restrictive measures to control the pandemic were imposed – closure of restaurants, interruption of school activities and even momentary suspension of street markets –, these initiatives gained momentum and, in some cases, replaced in-person market channels. Over time, however, three of them drew back and vanished, while only two became established as part of the “new normal”. This finding led us to the questions that guided the study: what factors explain the resilience of initiatives that succeeded in adapting to the changes resulting from the pandemic? And, how significant were these changes?

To answer these questions, we established a dialogue with a wider debate on the characteristics of institutional changes in capitalist societies (Mahoney & Thelen, 2009), and, particularly, to the controversies on how social movements can intervene in the production of an institutional order more favourable to their interests, motivations, and projects (Fligstein & McAdam, 2011; Hogan, 2006). In doing so, the article does not pursue a new response to the longstanding agency-structure sociological dilemma, but more precisely it contributes to an understanding of how specific fields (territorial food systems) respond to external shocks that, in theory, can generate profound institutional transformations. Findings show that measures to curb the health crisis opened a barred window of opportunity, mainly favouring the expansion of initiatives that were already in place and/or were driven by other factors, such as the socioeconomic dynamics of the territories where they are embedded, as well as by “the active role of entrepreneurs in

shaping paths by setting in motion processes that actively shape emerging social practices” (Hogan et al., 2022).

The article is organised as follows. Firstly, we introduce the concept of critical junctures, discussing how it has been employed in debates on institutional change. Then, we describe the empirical universe and methodological procedures. The subsequent session briefly describes the context of the pandemic in Brazil, in which attention is paid to the magnitude and effects of the crisis, worsened by the dismantling of public policies. Each one of the five cases is summarized in the subsequent section. The following section discusses the main factors differentiating these initiatives in terms of their capacity to adapt to the not-so-new institutional order. The final remarks summarize the main conclusions of the study and suggest avenues for further research.

2. Theoretical framework

In line with more general theoretical debates on institutional changes (Mahoney & Thelen, 2009), in the last two decades there has been a growing perception that changes in food systems are more gradual and cumulative than suggested by readings that emphasize the concepts of ruptures and critical junctures (Wiskerke & van der Ploeg, 2004; Caron et al., 2023). Even among supporters of what has become internationally recognized as “the food regime approach” (McMichael, 2013) – which, for its very origin in the French school of regulation, tends to understand institutional transformations as products of successive crises of diverse intensities – some have been reluctant to admit the emergence of a new regime and, therefore, have highlighted the resilience of institutional devices that defined the trajectory of the global food system in the post-WWII (Friedmann, 2016).

The international financial crisis of 2008 strengthened the debate over the role of critical moments in the transitions of contemporary capitalism (Armingeon, 2012). Nevertheless, it was the most recent political-institutional ruptures observed in Western democracies – of which the Brazilian experience has been a prime example (Niederle et al., 2019) – that revived the interest of many scholars on the pertinence of “punctuated equilibrium” models (Baumgartner & Jones, 1993) to explain abrupt institutional changes (Hogan, 2019; Beland & Powell, 2016; Capoccia, 2015). Finally, the pandemic outbreak of covid-19 became the “mega-disruption” (Marsden & Docherty, 2021) expected by some scholars to re-establish the concept of critical junctures as the cornerstone of their analyses (Hogan et al., 2022; Dupont et al., 2020; Amri & Drummond, 2020; Capoccia, 2016).

This discussion is closely related to the interpretation by some strands of the institutionalist approach that social changes are caused by exogenous shocks (revolutions, ecological catastrophes, wars etc.) that disrupt relatively long periods of stability. Historically, such strands have been criticized for concealing the importance of endogenous drivers (Mahoney & Thelen, 2009). Furthermore, as Mahoney (2001, p. 112) underlines, “not all choice points represent critical junctures; only those that close off important future outcomes should be treated as critical junctures”. The question that arises, therefore, concerns the parameters for considering the covid-19, or any other crisis, a “turning point” (Abbott, 1997) in the history of food systems.

One of the most prolific authors in defining critical junctures, John Hogan argues that the analytical strength of the concept improved as other strands of the institutionalist approach included concerns about the role of interests, ideas, and actors’ agency in explaining changes (Hogan, 2006, 2019; Hogan & Doyle, 2007). Hence, it was recognized that significant changes in institutional trajectories are dependent not only on external shocks, but also on the ability of “challenging” actors to make the most of the “window of opportunity”. Developed in McAdam’s

(1982) work on social movements, this concept supports that changes require not only the movement's collective resources but also a favorable socio-political environment. In a similar way, Tarrow (1994, p. 18) talks about the "political opportunity structure", which he defines as "consistent dimensions of the political environment, which either encourage or discourage people from using collective action".

While assuming that not every crisis can be seen as a critical juncture, someone could highlight the role of political or institutional "entrepreneurs" in building ideas and narratives that can be strategically handled to legitimize and guide institutional changes (Baumgartner, 2014). This understanding is in line with what Frizo & Niederle (2019) suggest regarding the determinants of institutional change in markets. Building upon elements of Jens Beckett's (2013) cognitivist approach, the authors argue that, besides altering the way resources available to actors are distributed, transformations in other fields also affect the "fictional expectations" that substantiate actors' adherence to the rules of their own field. Therefore, these external events can become a window of opportunity depending also on the meanings attributed (interpretative frame). It means that an event such a pandemic would become a critical juncture not only because of the intrinsic characteristics of the health crisis and its economic effects, but also depending on the existence of institutional entrepreneurs that are able to design "fictional expectations" (Beckett, 2013) about the severity of the crisis and its disruptive effects.

Discussing precisely the crisis represented by the pandemic, Hogan et al. (2022, p. 43) draw attention to the fact that "many empirical studies have also found that most crises are followed either by policy continuity or incremental change and do not serve as critical junctures or lead to trajectory altering policy shifts". According to them, these studies emphasize the resilience of institutional trajectories and contradict the most recurrent view that crises always offer opportunities for reform. Referring to the 2008 financial crisis, the authors show that, on the contrary, in moments of uncertainty social actors tend to reproduce institutionalized behaviors, rejecting innovation. Therefore, they suggest that institutional trajectories develop as a sequence of moments whose meaning is not predetermined by the nature of the external shock, and that, as to the effects of the pandemic, rather than a change of direction (the classical "critical juncture"), what predominates is a change in the speed of transformations that were already underway, what they term "path clearing" (Hogan et al., 2022).

3. Methodology

The study was carried out in two territories in the southernmost state of Brazil, Rio Grande do Sul: Litoral Norte and Médio-Alto Uruguai (Figure 1). Both are made up of small municipalities in which family farming is a relevant social actor. According to data from the latest Agricultural Census (Instituto Brasileiro de Geografia e Estatística, 2019), Médio-Alto Uruguai comprises 34 municipalities with an average population of 6,377 inhabitants per municipality. In turn, the Litoral Norte is made up of 20 municipalities and has an average of 15,656 inhabitants. From the point of view of agricultural establishments, the Litoral Norte is made up of 9,184 establishments, of which 81% are considered family farms. In Médio-Alto Uruguai this percentage is 88% of a total of 21,314 establishments (Instituto Brasileiro de Geografia e Estatística, 2019). These data highlight the strong presence of family farming and small municipalities in both territories. However, while the Litoral Norte is geographically close to the metropolitan region of Porto Alegre and Serra Gaúcha, Médio-Alto Uruguai is far from large consumer centers, which significantly changes the dynamics of markets (Tonin et al., 2024).

In sociohistorical terms, it is also worth noting that the Médio-Alto Uruguai is the birthplace of some of the main Brazilian agrarian social movements that, since the 1980s, have been fighting for the inclusion a huge contingent of smallholders who were excluded from access to public policies. In this territory there are farmers, indigenous and traditional communities to which not even policies aimed at family farming have reached and, when they did, they often resulted in an increase in social vulnerability as they encouraged productive practices – such as grain production – that were inappropriate to regional cultural repertoires and socioeconomic conditions, as well as the ecological characteristics of the territory, which suffers from recurring droughts (Tonin, 2022). The territory is home to a type of family farming that remained relatively out on the fringes of agriculture modernization, mainly because of the rugged topography of many areas on the slopes of rivers, where milk production, fruit growing, and artisanal food processing became predominant. Besides, it is also a territory marked by high rates of poverty and social inequality, what has led social movements to build marketing alternatives aimed at encouraging diversification and value adding to local products.

In turn, the Litoral Norte is a territory with other ecological characteristics. Also forgotten by modernization due to its ecological unsuitability for grain farming, the territory maintains a more biodiverse landscape, which is also due to the presence of smallholders and traditional communities that develop sustainable agricultural systems, such as agroforests. In comparison with the previous case, the Litoral Norte differs in at least three aspects. Firstly, it is a territory where a greater number of agroecological experiences can be found, which managed to get established integrating with the numerous environmental conservation areas of the Atlantic Forest. Secondly, farmers in this region have as their main consumer market the metropolitan region of Porto Alegre, located just 100 km away, and which has 4.0 million inhabitants. Unlike what happened in small municipalities, including those in Litoral Norte itself, Porto Alegre faced more restrictive measures during the pandemic, especially in periods when death toll rose rapidly and hospitals collapsed. Finally, the territory hosts a coastal strip where the main beaches of the state are located, and to where many people moved temporarily or permanently during the period of the pandemic, creating an unexpected demand.¹

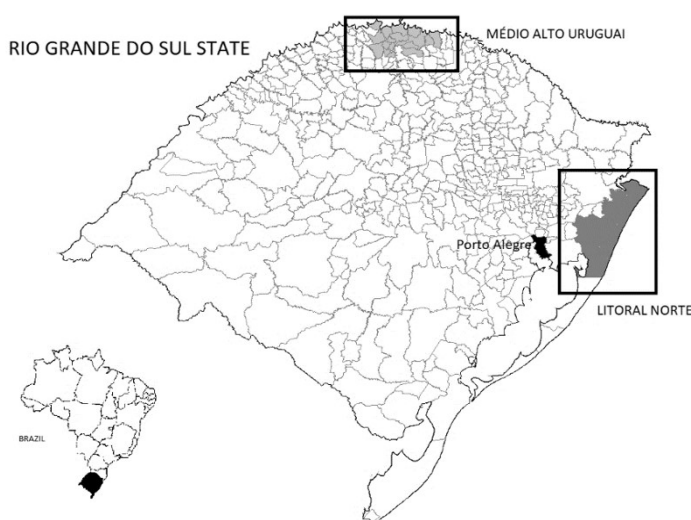


Figure 1 – Empirical universe: Litoral Norte and Médio-Alto Uruguai

¹ Until then, this was a dynamic restricted to summer months (January and February), when cities with 10 to 50 thousand inhabitants can accommodate from 200 to 400 thousand people.

These territories were selected for being contexts marked by a strong presence of family farming movements that have been engaged in building alternative food markets. Another motivation for choosing these territories concerns the researchers' previous connections with grassroots movements, what allowed a research design with active participation of local actors. Indeed, the first methodological step, even before defining the empirical universe, was to build partnerships with local organizations that became partners in the formulation of the study. The criteria for selection of the cases (initiatives) to be analysed were also defined in dialogue with these organizations. Such cases should consist of innovative marketing experiences, mediated by digital devices, and carried out by family farmers and their organizations.

Starting in May 2020, the first months of research were dedicated to approaching initiatives to be analysed in each territory: *Fitt Delivery*, *Rede de Orgânicos e Quitandeiros*, in Litoral Norte; *Alimentos de Origem* and *Produtos do Sítio*, in Médio-Alto Uruguai (MAU). Then, we started collecting data through semi-structured interviews and on-site observation. In 2020 and 2021, due to the pandemic, some of these activities had to be carried out remotely through videoconferences. Even so, using some periods when the health crisis was to some extent controlled, we could carry out face-to-face semi-structured interviews with farmers, rural extensionists, public officials, and community leaders. These interviews were recorded, transcribed, and later coded for content analysis supported by software (NVivo).

At first, mainly based on 35 interviews carried out in November 2020, we coded and analysed the interpretations local actors created to the different initiatives in view of constraints and opportunities that, also according to them, were placed by the pandemic. After that, based on interviews and direct observations we analysed the organizational structure and dynamics of each initiative and contextualize them into the reality of the territory where they are located. In order to do so, it was also relevant the possibility of counting on the results of a participatory study supported by the Brazilian Center for Analysis and Planning (CEBRAP), in which we contributed with technical support to the development of two of these initiatives (*Fitt Delivery* and *Alimentos de Origem*). In November 2021, we returned to 29 new interviews in both territories with the aim of diachronically understanding changes that had taken place in the same dimensions that had been previously coded and analysed. In April 2022 we returned only to Litoral Norte to seek additional data about this territory. Finally, in December 2023 we conducted five additional interviews with representatives from each of the initiatives with the aim of updating information. Unfortunately, due to the conclusion of the project supporting the study, at this moment it was not possible to interview suppliers and other actors that were initially involved with the implementation of the initiatives.

4. Results

This section initially describes the context in which the market digitization strategies we analyzed were designed. After that, it presents the data we collected in the two territories. The first two initiatives (*Alimentos de Origem* and *Produtos do Sítio*) are situated in Médio-Alto Uruguai, while the other three (*Quitandeiros*, *Fitt Delivery* and *Rede de Orgânicos*) in the Litoral Norte.

4.1 Facing pandemic in Brazil: health crisis in a context of policy dismantling

Brazil was one of the countries most affected by the covid-19, having reached, by May 2022, more than 665 thousand deaths. The crisis most critical periods were the escalation of deaths

beginning in May 2020, which led the country to one thousand daily deaths on average between June and August 2020. This level was resumed in January 2021, when death toll grew rapidly until reaching a daily 3.5 thousand on average in March and April 2021. Significant reductions in this number only began to be seen from the end of June 2021, reflecting the advance of the vaccination campaign (John Hopkins University, 2023).

While the health crisis was aggravated by the denialist stand of the Jair Bolsonaro's government, which minimized its risks and boycotted vaccination, the economic and social crisis became even more dramatic due to the previous dismantling promoted by the same government of supply and food security policies (Sabourin et al., 2020; Niederle et al., 2022), and the delay in creating and implementing emergency financial aid for companies and individuals.² This scenario led social movements to demand not only greater speed in vaccination (which proved to be widely accepted by the Brazilian population), but also the resumption of policies to fight hunger. Finally, in view of government lethargy, these movements had to engage in autonomous construction of grassroots initiatives (Carvalho et al., 2022).

The southern region of Brazil is home to important experiences of political activism aimed at building food markets (van der Ploeg et al., 2022; Gazolla & Schneider, 2017). Regarding specifically direct-to-consumer sales initiatives, two types of markets have proved to be more relevant in this region: street markets and public procurement. Their relevance is not always related to traded volumes, since sales to companies, cooperatives, and supermarkets are still the main options for most family farmers. The fundamental difference lies in their potential to promote practices anchored in principles of reciprocity, social justice, and food democracy. Although they were not the focus of the study, understanding what happened to these markets during the pandemic is essential to explain the construction of other alternatives (Alpino et al., 2020).

At the beginning of 2020, among the first measures taken by municipal and state governments (contradicting the federal government) there was the closure of several establishments of food commerce and consumption, with an immediate impact on farmers, especially those who sold perishable products. In the case of street markets, after a few weeks of stoppage to discuss health protocols, they were resumed. However, due to the surge in death toll, both farmers and consumers were then afraid to attend such spaces. Although the country has not officially adopted the lockdown at any time during the pandemic, a large part of the population has voluntarily adopted social isolation in the first months. Therefore, besides making arrangements for online sales and home delivery, also sales practices at street markets, especially in large cities, had to be modified. Greater distance between stands, sale of packaged baskets and payment with digital systems were some of the innovations.

They [farmers] are very close to consumers. So, they exchanged their phone numbers [...] and then, at times, they set up meeting points in the city because they couldn't hold a street market [...] setting delivery schedules to avoid confusion, and thus they organized themselves. When street market resumed [...], it was just one more meeting point for delivering baskets. It wasn't that thing of selling products at the stand, as it used to be. They prepared the orders at home, what increased the work, they had to organize the products and this communication also takes time. But people managed to do it, they got to organize themselves and, in some cases, people started to deliver products to houses in Porto Alegre. (Interview with rural extensionist, held in November 2020).

Gradually, however, many consumers understood that shopping at open-air environments with less movement of people, such as street markets, was a relatively safe practice. Furthermore,

² Del Grossi (2020) points out that 33% of Brazilian families faced reductions in their income in May 2020 and only half of them were able to access the benefit of R\$ 600 granted by the federal government. In rural areas, 51% of family farmers faced income reduction and 67% of these were granted emergency aid.

as street markets offer cheaper options than those found in supermarkets, the economic crisis stimulated consumers get back to them. Thus, in the second half of 2020, besides recovering initial losses, many farmers increased their sales in relation to the period preceding pandemic. For some of them, this meant a return to exclusively face-to-face sales, but others took advantage of the forced learning of the first months of crisis to reconcile the street market with sales through digital systems and delivery of baskets (see below).

Concerning public procurement, the main effects were associated with the stoppage of the National School Feeding Program (PNAE) due to schools' closure in March 2020. This measure had immediate impact both on beneficiaries, for worsening their food insecurity, and on farmers, for reducing sales. Cooperatives, which are primarily responsible for operating the program, were forced to find alternatives to sell their members' products, which resulted in: (a) increased sales to supermarkets; (b) partnerships with urban social movements that organized initiatives to donate baskets to people in situations of social vulnerability; and (c) the construction of digital marketing platforms (Carvalho et al., 2022; Gazolla & Aquino, 2021).

Over time, the pandemic's worsening and the economic crisis escalated food insecurity, forcing governments to respond to social pressures. In many cases, these responses came in the form of distribution of ultra-processed food baskets purchased from large retail chains. Nevertheless, there was also a resumption of programs aimed at food acquisition from family farming. In the case of PNAE, as schools remained closed, the alternative negotiated with cooperatives was the purchase of baskets for direct distribution to the students' families. This measure mitigated the problem in part, but besides being sporadic (unlike the weekly supply to schools), these purchases favoured non-perishable food, excluding farmers who traditionally provided fresh food.

4.2. Alimento de Origem

One of the main initiatives undertaken by local movements in the Médio-Alto Uruguai was the *Alimento de Origem* online platform (alimentodeorigem.com.br). Developed through a partnership between a local NGO, the Agência de Desenvolvimento do Médio-Alto Uruguai (Admau), and Federal University of Santa Maria (UFSM), the platform was initially aimed at organizing the operations of public procurement programs, in response to a perception that local family farming was not leveraging the full market potential created by programs such as the Pnae (Vattathara et al., 2021).

In 2013, nobody knew who had products, what were the needs of schools. There was merely a legislation establishing that 30% [of supply] should come from family farmers. So, together with Emater and the people from the cooperative [...], what have we done: we tabled the data on purchases made in the last period by all schools, products purchased and their origin; and then we noticed that most of fruit and vegetables were purchased from supermarkets. So, we started [...] to discuss the need to create a software, an online platform that allowed for knowing who the suppliers are and what PNAE demand would be... (Interview with the manager of the platform, held in 2020).

Eventually the platform was reconfigured to meet three objectives: marketing, traceability, and formalization of small-scale food processing through the Municipal Inspection System (SIM-Digital). With regard specifically to marketing products, it was organized to favor territorial proximity between supplier cooperatives and consumers, by means of identifying the municipality's postal code when accessing the platform. Initially, two cooperatives used the system: Cooperbio (Cooperativa Mista de Produção, Industrialização e Comercialização de Biocombustíveis do Brasil Ltda) and Coopraf (Cooperativa dos Produtores Rurais de Frederico

Westphalen). While the latter is made up of families whose main source of income is artisanal agri-food processing, the former is linked to the Movimento dos Pequenos Agricultores (MPA) and works in the production of bio-inputs and in supporting ecologically based production.

Data provided by the platform managers show an increase in sales in the first months of the pandemic, followed by a gradual reduction in subsequent months. Nonetheless, sales have never reached significant figures. In May 2020, the total amount sold was only R\$ 1,500 and, by the end of 2020, this value had already dropped to less than R\$ 200. Despite having 191 products registered for sale, in one year of operation of the platform, Coopraf had only thirty orders. Cooperbio had 159 requests from its list of 73 products (Vattathara et al., 2021). The second wave of Covid-19 (see above) allowed some survival to the platform's marketing module. However, soon after, sales dropped again and, by mid-2021, there were weeks when not a single order was placed.

Such low demand is due, firstly, to the territorial context itself: small municipalities, with low population density and consumers not used to buying food on digital platforms. In addition, health protocols adopted in these municipalities only temporarily and partially affected the operation of physical markets and thus supermarkets and street markets remained the main marketing channels. The relaxation of social distancing protocols, associated with the strong repercussion of the denialist discourse adopted by the federal government on more conservative segments of the population, also meant that many consumers did not change their eating routines and practices. In addition, the platform proved to be complex and time consuming, so that, due to the small scale of sales, not only consumers, but also the cooperatives themselves preferred to operate with simpler applications, such as WhatsApp.

Finally, the platform managers themselves were never really convinced that, in this territory, this type of direct-to-consumer market constitutes a long-term feasible strategy given that, according to them, the scale of production with which those cooperatives operate demands the access to national and international value chains. In this sense, not even the strong criticism that the pandemic provoked about the effects of the food systems "delocalization" (Bentsen & Pedersen, 2021; Gliessman & Ferguson, 2021) resulted in new fictional expectations supporting the political construction of territorial food markets (Schneider et al., 2020). Since these actors did not face strong pandemic-related restrictions in this rural region, they never really framed the crisis as a critical juncture that would oblige them to change their marketing strategies. This impacted their ability to find institutional allies and engage consumers or, in other words, to constitute themselves as "institutional entrepreneurs".

4.3. Produtos do Sítio

The Produtos do Sítio brand was created in 2017, on the initiative of a family of young neo-rural farmers who produce and sell organic food. From the start, the strategy of this initiative is fully based on delivery. However, that was not what drew research interest, but the fact that, during the pandemic, it organized a marketing network that involved nine other families, all of them linked to the Ecovida Agroecology Network, which is one of the main Latin American movements engaged in food systems' agroecological transitions (van der Ploeg et al., 2022; Niederle & Wesz Junior, 2020).

In Médio-Alto Uruguai, agroecology experiences have been limited by various factors that include strength of the institutional apparatus that favors grain production, geographical distance between ecological farmers, and limited demand due to the small number of consumers. The network built around the Produtos do Sítio brand is one of the first local initiatives that managed to overcome

these challenges by expanding the scale and scope of supply, reducing logistics costs through collective action, and, implementing a digital marketing strategy around healthy eating.

In 2021, about 80% of production were sold through digital channels, of which 60% of orders are placed through a website and 40% via WhatsApp. According to the farmer who heads the initiative, this site only started to be used in 2021 and, unlike the case of the Alimento de Origem platform, it is an adaptation of a sales system (Goomer) aimed at restaurants, which proved to be easily handled by both farmers and consumers. Furthermore, although not being as popular as WhatsApp, the site facilitates logistic and accounting processes as it allows for automatically generating purchases reports.

As compared to the period prior to the pandemic, the number of orders more than doubled in the first months of 2020 (reaching 140 deliveries per week). In the second half of the year, however, it dropped to about 90. In addition to the relaxation of restrictions and resumption of physical markets, the economic crisis affected purchasing power of a significant part of consumers. Even so, as these effects did not affect all social groups in the same way, the amounts per order continued to increase, what ensured maintenance of the income obtained by farmers during the most critical months of the pandemic.

Then, it reduced and returned to the same level we had before the pandemic as to the number of orders. But, at the same time, we prepared ourselves for the pandemic. So, production scale was increased. Instead of planting 50 lettuce seedlings, we planted 200. The cool thing about it all, orders dropped by half as compared to pandemic, but we meet everything the customer wants, and we partnered too. So, we deliver half of what we did during pandemic peak but take the full amount. So, in terms of values, it's at the same pace as during the pandemic. (Interview with the farmer who manages Produtos do Sítio brand, held in 2021).

This case illustrates a successful collective action that was made possible through the institutional entrepreneurship of a family of young ecological farmers, who took advantage of the window of opportunity opened by the pandemic to engage, on the one hand, other family farmers linked to Ecovida Agroecology Network around a project aimed at direct sales of organic food, and, on the other hand, consumers more and more interested in healthy food. In this sense, it is important to note how this actor took advantage of a fictional expectation regarding the importance of healthy eating that gained strength during the pandemic and helped boost the organic food market in several countries (Schneider et al., 2020; Wang et al., 2022).

A more recent development in this case involved the transfer, in 2023, of the commercial operation from the Goomer website to the Alimento de Origem. At the end of this year, whereas Cooperbio and Coopraf practically stopped selling their products by this platform, Produtos do Sítio became the only organization using it for this purpose. This was not an option before because some of farmers that supply Produtos do Sítio did not fit formal exigences of the platform related to sanitary rules. At this point, it is essential to take into account that, because of its weak commercial performance, the economic viability of the platform is only assured by the service it offers related to the SIM-Digital (see above). Therefore, besides of selling around 40 food baskets per week by the platform, Produtos do Sítio started to use this formalization system that allows the access to other market channels, but at the cost of reducing to only four the number of other families supplying products. Indeed, the network component lost importance since now 90% of the sales are related only to food offered by the Produtos do Sítio itself.

4.4. Quitandeiros

In the Litoral Norte, Quitandeiros (greengrocers) is how family farmers who sell food door to door are known locally. These sales occur mainly in beach towns where most consumers

in the territory are located and where there is practically no agricultural production due to environmental (soil and climate) and economic factors (opportunity cost of land use due to urban expansion). In general, these farmers have a diversified production and sell small amounts to regular consumers who are approached directly at their homes on specific days of the week. Instead of ready-made baskets, farmers traditionally take different products for consumers to choose at the time of purchase.

As the beaches had a significant population increase during the pandemic, many consumers were afraid to go to supermarkets, leading demand in other channels to increase. However, traditional door to door sales, in which consumers handled the food and maintained close contact with the greengrocers, was also avoided, including by farmers themselves. The alternative was to move to a WhatsApp sales system, in which greengrocers offer a weekly list of products for consumers to select. As interviews carried out in November 2020 demonstrated, the result was a significant growth in demand, to such a degree that greengrocers chose their customers.

According to interviews carried out in 2021, over time, relaxation of restrictions, restructuring of face-to-face markets and, above all, the worsening of the economic crisis led to a significant reduction in this demand. Even so, the dynamics of selling via WhatsApp was incorporated and remained predominant, allowing for an improvement in the logistical organization. Added to this, money was mostly replaced with digital payment systems.

At first it boomed. The pandemic came and people panicked. [...] So I wrote on Whats: I'm going to keep selling and I'm going to use alcohol gel and gloves and mask; and I wouldn't let them get to the car. Then, that's when the bag part started off, something I had been brooding over for a while, because it would be a more practical way. You deliver very quickly and don't keep walking. You arrive, deliver, and receive. And they paid me with Pix or bank card and some pay to my bank account. [And in the last year and a half, has it increased or decreased?] It got a lot worse. [...] My sales decreased; I think they dropped to about 30%. They had a peak in the pandemic, it was crazy. I was even a little afraid, if the pandemic was going to be always like this, I would have to plant a lot of things to supply, because there was a desperation to take things. It looked like people wanted to stock up on food. (Interview with a greengrocer in November 2021).

Therefore, what was noticed in this type of initiative was an acceleration of the digitization, revealing the "path clearing" effect of the pandemic (Hogan et al., 2022). Instead of a sophisticated marketing and payment platform such as those created by Alimento de Origem, this was done with simple tools that were already widespread in rural areas in southern Brazil, such as WhatsApp and PIX (a type of digital payment system). This phenomenon echoes a narrative supporting that this type of small-scale direct selling initiative is more efficient when implemented individually, as it allows operating with low-cost, widely available tools, and does not require formal regulations and controls such as those related to the sanitary certificates demanded by Alimento de Origem to meet the requirements of public laws.

This interpretation is strongly connected with a reality well known by family farmer's organizations that, since the 1990s, have been demanding for policies supporting small-scale food processing structures. Such initiatives are generally blocked by legislation that imposes to these farmers practically the same requirements imposed on large food processing companies. Family farmers are then forced to work informally, which prevents access to certain markets, including public purchasing programs. No significant changes in this regard were produced as an effect of the pandemic. On the contrary, the crisis contributes to exacerbating consumers' fears regarding food contamination, which contributed to increasing the consumption of ultra-processed products (Malta et al., 2020). The Quitandeiro's case only reinforces marginal experiences that, due to their individualized configuration, have a very low capacity to produce more significant institutional changes.

4.5. Fitt Delivery

This is an initiative of the Cooperativa Mista de Agricultores Familiares de Itati, Terra de Areia e Três Forquilhas (Coomafitt), which was formed in 2006 and currently represents 175 family farmers who mostly sell fruit (mainly bananas) and vegetables. The cooperative formation was prompted by the difficulty faced by these farmers in escaping dominance of the market by middlemen. However, this was only possible following the strengthening of public procurement programs such as the PNAE. Like several other family farming cooperatives created in the same period, before the pandemic Coomafitt's sales were mainly aimed at these markets. Schools closure, then, seriously affected this organization and its associates. Seeking alternatives to the crisis, in March 2020, and trying to associate the image of the cooperative to the discourses on healthy food that has boosted by the pandemic, the cooperative created *Fitt Delivery*, a project to sell baskets for home delivery in the municipalities of the Litoral Norte.

Although some members already worked with this type of sale as *quitandeiros*, *Fitt Delivery* opened digital markets and direct sales at Coomafitt. Initially, orders were placed directly on WhatsApp. However, the growth in demand forced the cooperative to implement an electronic form. Between April and September 2020, 2,500 baskets were sold, which meant an average of 97 weekly orders. The success experienced prompted Coomafitt to seek a more sophisticated digital platform where consumers could freely choose products. But, giving up the basket mode entailed increased work to manage orders, what was aggravated by the fact that the new platform did not automatically generate a list with the total quantities ordered.

The adoption of a suitable platform was made possible at the end of 2020 through a partnership with GiraSol, a consumer cooperative from Porto Alegre that already purchased Coomafitt products to supply its own digital marketing platform (see Preiss et al., 2022). In January 2021, the cooperatives jointly launched the "Healthy Summer Project", whose target audience was the "vacationers" who move to the beaches in summers. In addition to exchanging products to increase supply diversity, the partnership allowed Coomafitt to move to a new digital platform, which consisted of a copy of GiraSol's virtual store. Besides enabling a more dynamic interaction with consumers, it allowed the digitisation of the management processes and accounting control of sales.

Nevertheless, the project's result in terms of turnover was below expectations. From its launch to the end of April 2021, the cooperative registered 498 orders, which represents an average of just 35 orders per week. In October 2021, sales were interrupted because orders had dropped to just ten per week. Explanations given by managers for such performance include relaxation of restrictive measures, resumption of in-person purchases, economic crisis and decrease in purchasing power, poor awareness of the platform by consumers and the fact that the target audience of Healthy Summer Project, the vacationer,³ is not accustomed to this type of purchase. Two excerpts from interviews conducted in 2020 and 2021 summarize these changes over time, also highlighting the growing relevance of sales to supermarkets.

The prognosis is that we boost delivery for the summer. [...] Despite the pandemic, people will go to the beach the same way, as it has been happening with holidays and weekends. We want to make the most of this opportunity to boost sales and consolidate this delivery project partnered with GiraSol (Interview with cooperative manager in November 2020).

With regard to markets, we challenged ourselves with delivery, and there was a high demand at the time of the pandemic. There was a great demand and then, later, it decreased, because people went back to supermarkets, to their activities, and we had to stop now and evaluate what we should do to be able to continue, because it

³ The "vacationers" profile differs from both permanent residents and tourists. They are, generally, families from municipalities in the state that, either for convenience or economy, purchase their food in supermarkets in their own cities before traveling for a brief vacation on the beach.

was no longer viable for the logistics implied. But, at the same time, with the pandemic, we also noticed that we shouldn't focus only on school meals, that this shouldn't be our main market. So, one thing we've been considering is supermarket chains. (Interview with cooperative manager in November 2021).

Coomafitt's trajectory during the two years following the beginning of the pandemic demonstrates, therefore, that the construction of a digital platform was a response to the crisis of food procurement policies, which nevertheless did not consolidate for lacking an adequate number of consumers to make it economically viable. The immediate consequence was the emergence of another narrative that was widespread among managers of family farming cooperatives, which questioned the potential of local direct sales markets, extolling the advantages of insertion into supermarket chains, especially in terms of scale and reduction of logistic costs. The counterpart of this discourse is the idea that, given the limited demand, direct sales should rest on farmers own initiatives, as is precisely the case for some Coomafitt partners who are *quitandeiros*. Because of that, from 2023 onwards, with the resumption of public purchasing programs, the cooperative's focus has once again turned to this type of market.

4.6. Rede de Orgânicos de Osório

The last initiative stemmed from an alliance between consumers and producers of organic food in Osório, a city in the Litoral Norte with 46 thousand inhabitants that has a relatively stable urban population throughout the year (it has no beaches) and a rural area with diversified economic activities (agriculture, tourism, gastronomy, and artisanal food processing).

Created in 2016, *Rede de Orgânicos* (Organics Network) stemmed from the initiative of university students and professors to form a consumer group inspired by the well-known international experiences of community-supported agriculture (CSA). This group contacted five farmers who either produced organic food or were willing to enter a transition process to organic production. Over time, the network has expanded and, in 2020, involved 13 family farmer who met an average of 200 orders per month.

At the start of the project a list of foods available was sent once a week to consumers. Requests were then made via WhatsApp and a member of the group was responsible to collect the orders and organize the supply distribution among the farmers. With the support of students from the Federal Institute of Rio Grande do Sul (IFRS), in 2019 an online platform was created, which enabled retrieval of aggregated data and allowed the farmers themselves to register their products, while consumers still can freely choose the items to fill their baskets.

Before the pandemic, individual baskets were assembled together with the consumers when they went to fetch them. Concentrating distribution in certain locations (generally public agencies that are partners in the initiative) sought to increase direct participation of consumers. According to one of the entrepreneurs of the initiative, this was possible because "70% are activists of active consumption" or, as the literature has defined, of "political consumption" (Stolle & Micheletti, 2013). However, due to health control measures, this system was changed at the beginning of 2020. Since then, all farmers take their products to the place where consumers will fetch them, but the baskets are assembled and packed one hour before distribution by a single member of the group.

The strategy of bringing producers and consumers closer also became more difficult as the pandemic pressed for the opening of the Network to new entrants. Besides these latter being consumers rather concerned with their individual supply than with strengthening a collective strategy, the new demand generally entailed the creation of a new distribution site and, therefore, an increase in logistic costs. Following a lengthy discussion on this subject, the

decision to restrict the network's activities to the sites already established resulted, on the one hand, in internal disagreements and even withdrawal of farmers who started to operate individual delivery systems and, on the other hand, in a relative stability of the number of consumers over the two years of the pandemic. As in the case of *Produtos do Sítio*, the most significant variations were in the volume purchased per consumer.

When I noticed that there were growth prospects, that it could be greater, that's when they said no; said that new entrants should meet the criteria. [...] They put a lot of barriers for people to enter. But I think it should not be complicated, because if a certain product is missing and I have a producer who can supply that product, why not add it?! (Interview with farmer in November 2020).

And then, with the website, in the pandemic, we grew as regards consumption. What I noticed is that the number of baskets did not increase, but the size of the baskets, the volume of consumed products increased, the average basket per consumer was valued 20 to 25 reais and now it is 50 reais. So, people started to spend more on organics, invest more in organics. [...] Consumers remained more or less the same as always. (Interview in November 2020).

This case shows that the pandemic opened opportunity for the expansion of direct sales markets mediated by digital tools, but that, unlike what happened with the other initiatives, *Rede de Orgânicos* adopted a conservative strategy, favoring the strengthening of already constituted social ties. Although producing internal conflicts and limiting farmers' economic gains, on the one hand, it ensured a greater stability over time, so that the retraction caused by the pandemic and the worsening of the economic crisis did not jeopardize this initiative. On the other hand, this strategy considerably limited the capacity of these actors to challenge the field structure. In Hirschman's (1972) terms, while they adopted a sort of "loyalty" strategy, internally, they had to deal with members that opted for "exit" the network.

5. Discussion

The two interrogations that oriented this study are related to the factors explaining the resilience of grassroots initiatives of digital food markets that succeeded in adapting to the changes resulting from the pandemic, and, at the same time, to the significance of these changes in two specific social contexts, Litoral Norte and Médio-Alto Uruguai. In both regions, we note that the impact of covid-19 was partial, limited, and intermittent, prevailing in very short periods when a few face-to-face marketing practices were restricted. Most of the time, however, the basic measures of sanitary control did not cause significant disruptions in local markets, except for those based on government demand. And it was precisely this exception that made the situation of family farmers' organizations much more critical than those experienced by other market agents. The suspension of public purchasing programs, as an indirect effect of the pandemic, was the stimulus for the *Alimento de Origem* and *Fitt Delivery* marketing digitisation initiatives.

These regions present peculiarities due to locational and demographic factors. In the Litoral Norte, the proximity to wider consumer centres favoured *Coomafitt's* operations in the first months of the pandemic. However, contrary to initial expectations of both its managers and the researchers themselves, *Fitt Delivery* had to be interrupted when the relaxation of health control measures caused an abrupt drop in demand, entailing an increase in distribution logistic costs. As we observed from interviews, the reduction in the number of orders was mainly a repercussion of both resumption of in-person shopping at street markets and supermarkets and the economic crisis with its resulting sharp drop in consumer income. Then, in 2023, the cooperative once again reoriented its efforts towards this food acquisition programs, which suggests that, in this case, another external institutional change, resulting from the political reconfiguration after the 2022 presidential election, appears to have had more relevant implications than the pandemic.

In Médio-Alto Uruguai, a region mostly composed of small rural municipalities, in addition to the limited number of consumers for whom shopping on digital platforms is not a common practice, there are also intrinsic difficulties faced by some local actors in performing as “institutional entrepreneurs” (Fligstein & McAdam, 2011) of the new markets. Such difficulties were not so much related to mobilization of resources – since Alimento de Origem digital platform got established as a viable option for services other than direct marketing (traceability and health inspection) – and rather to the construction of an “imagined future” (Beckert, 2013) capable of effectively include the new digital marketing devices as a central component of the territorial development strategy. Indeed, as soon as the restrictions imposed to control the pandemic began to ease, Admau’s discussions focused again on old projects, such as how to add value to products aimed at national and international markets.

In both regions we found actors who took advantage of the “window of opportunity” opened by the pandemic to consolidate previously existing initiatives. This was the case of Quitandeiros and Rede de Orgânicos in the Litoral Norte and of the Produtos do Sítio in the Médio-Alto Uruguai. Betting on more simple and cheaper digital tools, such as WhasApp, at the beginning of the pandemic these actors were forced to quickly adapt their sales systems to serve primarily consumers with whom they had well-established relationships, and gradually adding new consumers only insofar as they would not compromise, on the one hand, the financial balance of the logistic system, and on the other hand, the values and principles that guide the initiative (in the case of Rede de Orgânicos). Thus, they found a way to settle themselves as viable marketing alternatives in the post-pandemic new territorial arrangement of markets.

Nevertheless, unlike the broader and more heterogeneous coalitions of grassroots movements that created Alimento de Origem and Fitt Delivery, these initiatives have a limited reach both in terms of the number of actors involved (and, therefore, market scale) and political capacity to produce a new narrative about “*les mondes d’après*” (Jahel et al., 2021). Indeed, the development of these initiatives on the margins of the field is likely to confirm the perception that, in these territories, the pandemic did not entail a disruptive effect on the dynamics of territorial food markets. What prevailed, as suggested by Hogan et al. (2022), was a process of “path clearing”, that is, a change of speed in processes that were already underway. Then, contrary to expectations of who saw a window of opportunity to speed transition to agroecological food systems up (Gliessman & Ferguson, 2021; Montenegro de Wit, 2021; Altieri & Nicholls, 2020), in these two regions the pandemic made little room for new imagined futures.

In the two regions, it was also possible to notice a very limited performance of actors who could play the role of “institutional entrepreneurs”, challenging the prevailing structure of territorial food markets. Nevertheless, while more individualized initiatives such as those formed by Quitandeiros have not even engaged the construction of a narrative about the pandemic as a critical juncture, more limited articulations such as the networks constituted by Produtos do Sítio and Rede de Orgânicos abdicated from doing so due to lack of resources, and the cooperatives that could catalyse a more expressive critical movement created their initiatives only as secondary options, being unable to connect their digital platforms to an image of future in which they could play a relevant role in a more diversified arrangement of territorial markets.

6. Conclusions

Studies suggest that the pandemic has brought about changes in food systems from farm to fork (Schneider et al., 2020; Preiss, 2020; Gazolla & Aquino, 2022; Béné et al., 2021; Soendergaard et al., 2020; Food and Agriculture Organization, 2021; Burnquist et al., 2020,

among others). There are also those who suggest that, along with differences between countries due, for example, to the degree of dependence on global commodity chains and the type of response adopted by governments, companies, and individuals (Ajayi et al., 2020), the repercussions within a same country differ significantly between social groups (Tittone et al., 2021; Power et al., 2020). Despite the relevance of these findings, long-term effects of the pandemic are yet to be carefully analysed, considering that the confluence of multiple crises makes it extremely difficult to isolate causal factors.

The cumulative and persistent effect of these different crises advises against an approach from the perspective of “punctuated equilibrium”. Long-term stability in food systems seems to be getting farther and farther away. The predominance of what Wilkinson (2008) had already called a “permanent tension” suggests being unlikely for a single great external shock to be capable, independently, of altering the course of social changes, as occurred in the past as a result of certain wars, economic crises, and epidemics. Furthermore, as Hogan et al. (2022) warn, many of these critical junctures may just accelerate or reduce the speed of changes that are already underway, without causing changes in their direction.

The fulfilment of lasting changes in institutional trajectories depends not only (and perhaps not even mainly) on the existence of an external shock, but on the abilities of challenging actors to take advantage of the “window of opportunity”. On the one hand, these skills are expanded in proportion with a greater ability to engage other actors in building coalitions that facilitate access to resources and, at the same time, strengthen narratives about new futures (Beckert, 2013; Fligstein & McAdam, 2011). The initiatives we analysed in this article suggest the challenging actors that had resources and coalitions to defy the institutionalised order in the field have not been able to establish themselves as institutional entrepreneurs and, because of that, once the pandemic ended, they moved back to their previous strategies. On the other hand, it is important to recognize that their abilities are limited not only by the critical juncture itself (pandemic-induced economic downturns that affected the demand), but also by other related critical factors such as the dismantling of public policies (that reduced the resources availability) and the denialist discourse of the Bolsonaro government concerning the pandemic (stimulating people to carry on with their lives as normal).

7. References

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