The Export of Food Made in Italy
The case of Italian Sounding

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INTRODUCTION

In a world where million people are searching for healthier, safer and taster food, there have been developing, in the context of agro-food market, new methods and strategies by several companies to achieve their business aims easily and without any quality certifications.

Nevertheless, the agro-food market, especially through new European Legislations, is providing companies more and more opportunities to make consumers aware about the quality of their offer. Often, as the data given in this work reveals, Italian companies demonstrate not to be able to take advantages of these opportunities given by the market, and usually do not succeed in fighting against foreign companies that try to sell fake-Italian products. The aim of the thesis is to analyse the sector taken into account, to emphasize the main features of made in Italy specifications, to come up with “the needs to act and the way forward”.

The first chapter is divided up in three paragraphs. The first one introduces the food market from a historical point of view and it emphasizes the changes in market conditions before and after the Financial Crisis of 2008. The second paragraph analyses the main players in Italian food-market through the supply chain of the sector in order to bring the relationship between farmers, producers, retailers out. The last paragraph compares data about Italian food-export in order to point our main target Countries out. It measures the export volume based on transformation degrees of Italian products.

The second chapter aims to define chronologically the concept of Country of Origin, its evolution in the literature and the general phenomenon of Made in Italy, then particularly associated to the agro-food system. The agro-food system made in Italy is analysed on one hand based on European legal framework, in order to indicate concrete information about our COI, and from the other hand based on values people usually attach it to.

The third chapter aims to analyse the strategies of Country Sound Branding, using the definitions given in the previous chapter; through the different meanings of Country of Origin, it pointed out that companies are used to implement several brand strategies based on the origin of the product. As stated before, according to the theme of Consumer Awareness, these strategies stem from the incapability by the consumer to recognize the real origin of the product. For this reason, the chapter focuses on the theme of Italian Sounding, distinguished from the other counterfeiting methods of Made in Italy. Finally, a last paragraph compares the theories that consider it as an opportunity of growth with the ones that consider it as a threat for the agro-food system made in Italy. In this regard, a SWOT analysis emphasizes strengths, weaknesses, opportunities and threats in Italian agro-food system taking into account the impact of Italian Sounding on our market.
1. The food market

1.1 Historical Dynamics

The globalization, that is the trend of the markets to take on an international dimension, is not the latest phenomenon (Baldwin e Martin, 1999). The trading and financial integration, known as globalization, has been going through important changes: these changes are surely due to membership in E.U. that determined the adoption for the Members of common rules that have to confer same rights and responsibilities.

In particular, the globalization of the agro-food system and the growing variety of food products and technologies have made it increasingly difficult for nation-states to regulate food safety and quality practices (Sodano, 2006). Effectively, the E.U. laws restructured the agro-alimentary legislation, as consequence of the crisis of agro-alimentary sector in 80’s that risked consumers’ lives through pathologies such as B.S.E. and F.M.D.

For this reason, the whole food supply chain\(^1\) has to be considered in order to guarantee higher safety to consumers. Therefore, the principles on this subject have been developing and listing in the “Green Paper” (From farm to fork, 30/04/1997) and then in the “White Paper” (12/01/2000), thus in this chapter it is given only a sketch.

In this context of globalization, the dynamics of food market in the last fifteen years have been observed and explained. Actually, the first ten countries exporting agro-alimentary products cover the 53% of the whole export of these products; therefore, the global export of agro-alimentary products belongs to the 20% of the countries considered\(^2\). The data evaluated are referred to time series between 2010 and 2011. Most of the occidental countries have registered high growth-rates, and, in particular, Italy has pointed out good performances in the agro-alimentary, higher than in the other sectors (Romano, 2011). In order to measure the weight of these performances on countries ‘economy and to establish indications about the specialization

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1 The food supply chain is distinguished in two main types:
- Agro-food chains for fresh agricultural products’ (such as fresh vegetables, flowers, and fruit). In general, these chains may comprise growers, auctions, wholesalers, importers and exporters, retailers and specialty shops and their input and service suppliers. Basically, all of these stages leave the intrinsic characteristics of the product grown or produced untouched. The main processes are the handling, conditioned storing, packing, transportation and especially trading of these goods.
- Agro-food chains for processed food products’ (such as portioned meats, snacks, juices, desserts, canned food products). In these chains, agricultural products are used as raw materials for producing consumer products with higher added value. In most cases, conservation and conditioning processes extend the shelf-life of the products. (Jack G.A.J. van der Vorst, FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS, Rome, 2007).

2 The countries considered are here listed according to their market shares. U.S.A. (10,5%); Netherlands (6,4%); Germany (6,4%); Brazil (5,9%); France (5,8%); China (4,4%); Belgium(3,4%); Argentina (3,4%); Canada (3,4%); Italy (3,2%); Spain (3%); Indonesia (2,5%); Tailandia (2,4%); United Kingdom (2,4%); Malesia (2,4%); India (2,0%); Australia (2,0%); Denmark (1,7%); Mexico (1,7%); Poland (1,6%); New Zealand (1,5%); Chile (1,1%); Turkey (1,1%); Ireland (1,0%); Ukraine (0,9%). (Un-Comtrade data).
of the countries in agro-alimentary export, it has to be introduced the R.C.A. index\(^3\). Even if the agro-alimentary market has always been one of the main strengths in Italy, R.C.A index indicates how our country finds low comparative advantages in agro-alimentary export.

### 1.1.1 The crisis

During the period between 2007 and 2011 the international trading of agro-alimentary products endured the distortions caused by the interchange of development and recession. Through the analysis of the variations between those four years, it is stressed that the agro-alimentary market has been going through a great development period until 2008, whereas it has been registering reasonable contractions after the economic and financial crisis in 2009\(^4\). The trend of food market has to be compared with international trends of global demand, the evolution of raw materials’ prices and with the fall of export amounts during the crisis (Finizia, 2011). This crisis has been characterized by a sudden and unexpected fall of the commodities, either for primary energetic consumption, either for agro-alimentary consumption, or by the decrease of demand by Occidental Countries hit by the crisis. After 2009, the countries leader in agro-alimentary trading have been registering dramatic variation rates in the export: in particular, Italian agro-alimentary export had a decline per -11%.

### 1.1.2 Italian performance after the crisis

In 2014, the final outstanding trading balance was about 43 billion €, with an increase of 47%, compared with 2013. As said before, in 2012 there has been a trend reversal compared to the negative dynamics that characterized the international trading balances from 2007. However, the Italian final agro-alimentary balance, in 2014, registered a shortfall that reached 6 billion €, in the European context where there has been going through a growth of agro-alimentary sales’ flows. In facts, the partial growth of Italian economy was due to the positive trading flows of not agro-alimentary products. Nevertheless, the export in 2015 reached 35 billion €, with an overall growth of 2.7%. The Italian positive performance was certainly due to the increasing of the total exported amount and to the direct import that lined up to 41 billion €, with an overall growth of 2.9%.

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\(^3\) The *Revealed Comparative Advantage* (RCA) index indicates the ratio between the shares of agro-alimentary export on the overall export of the country considered and the shares of global agro-alimentary export on the overall global export. A value >1 indicated a specialization of the country in agro-alimentary exports.

\(^4\) The financial crisis of 2007–09, also known as the global financial crisis and the 2008-09 financial crisis threatened the collapse of large financial institutions, which was prevented by the bailout of banks by national governments, but stock markets still dropped worldwide. In many areas, the housing market also suffered, resulting in evictions, foreclosures and prolonged unemployment. The crisis played a significant role in the failure of key businesses, declines in consumer wealth estimated in trillions of U.S. dollars, and a downturn in economic activity leading to the Great Recession of 2008–2012 and contributing to the European sovereign-debt crisis. "Brookings-Financial Crisis". May 1, 2010.
For what concerns the distribution of agro-alimentary trades, in 2014 the Eurozone covered the 66% of Italian total export, and the 70% of Italian total import. The North America has been our second end market: in facts, it absorbed 11% of Italian export and it represents the 4% of agro-alimentary raw materials import. Thus, the most relevant trading flows in agro-alimentary sector included North and South America, where the export has been increasing for 10.6% and 6%;
In spite of what has been said for American Countries, Italian export towards U.E.-28 was more restrained (Castellotti).

### FIG. (1.1) “Annual Variations of Food Export and Total Export during 2007-2011”

It represents variations (%) compared to the previous year\(^5\).

### FIG. (1.2) “Annual Variations of Italian and 10 Leading Countries Export during 2007-2011”

\(^5\) Data provided by “Export e tutela dei prodotti agroalimentari made in Italy”. (2011)
FIG. (1.2) “Annual Variations of Italian and 10 Leading Countries Export during 2007-2011”. It represents variations (%) compared to the previous years.

1.2. Food supply chain

The Supply Chain has also been affecting the ways in which food is produced, processed and delivered to the market.

An agro-food system includes organizations that are responsible for the production and distribution of vegetable or animal-based products.

In general, we distinguish two main types:

1. “Agro-food chains for fresh agricultural products” (such as fresh vegetables, flowers, and fruit). In general, these chains may include growers, auctions, wholesalers, importers and exporters, retailers and specialized shops and their input and service suppliers. Basically, all of these stages leave the intrinsic characteristics of the product grown or produced untouched. The main processes are the handling, conditioned storing, packing, transportation and especially trading of these goods” (van der Vorst).

2. “Agro-food chains for processed food products (such as portioned meats, snacks, juices, desserts, canned food products). In these chains, agricultural products are used as raw materials for producing consumer products with higher added value. In most cases, conservation and conditioning processes extend the shelf-life of the products”.

The Food Supply Chain is strongly associated to “Locality”. The starting point, in facts, is that if a customer identifies locality as a value, the benefits he is given by the use of local supply are furthermore greater than risks and sacrifices. The consequence of this “right perception” by the customer, has an impact to the supplier too, that may start taking an advantage of locality in its efforts to establish a convenient position either on the local food market either on international markets.

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6 Look at previous note.
7 One of the latest classifications of food-farming takes into account all of the degrees of transformation of products that have been keeping positive their trade-balance at least for three years.

The items are then identified in three categories:
- Farming Products
- Transformed Products
- Food Industry Products

The Farming Products include fresh fruit and vegetables, rice and products of floriculture.
The Transformed Products include wine, tomato sauce, cheeses, fruit juices, olive oil, vinegar and mineral water.
The Food Industry Products include pasta, coffee, ice creams, confectionery products and spirits.
Therefore, the link between food supply chain and locality is explained by the customer value, that is the “value got when using local products and purchasing products through a local food chain”, instead of using imported products.

“In the food supply chain approach, a great deal of emphasis should be laid on the type of relationships between the producer and the customer, rather than the product itself, as well as the role of this relationship in creating value” (Marsden, 2010).

1.2.1. Italian Food Supply Chain

Following Marsden (2010), in the Italian food-farming market, it is really impressive the importance given to producers, products and customer at the same time.
This could be certainly related to the fact that in Italy, food has always been more than eating just to keep the body alive or to have the mouth fed.
The importance given to Locality could be just well explained through the fact that the twenty Italian regions have their own cuisine, various and several inside the regions too.
The result is of course an enormous variety of dishes across the country.

However, the Italian food supply chain has something different that drifts it apart from the classical Supply Chain. This is related to the fact that Italy is tightly tied to its tradition, particularly clear in the first part of the supply chain, so the resource of raw materials and the primary production.
This way to make Supply chain is due to the concept of a “Management philosophy that leads farmers, producers and sellers to the creation of the customer value” (Ellram, Cooper, 1990).

“Many agribusinesses and food processors source raw materials from smallholder farmers. This is particularly true in certain sectors, such as coffee, cocoa and sugar. Over the past 20 years, there has been a shift towards more traceable supply chains. Rather than purchasing crops that have passed through several layer of collectors, firms are now sourcing directly from farmers or trusted aggregators. The drivers for this change include concerns about food safety, child labor and environmental sustainability as well as a desire to increase productivity and improve crop quality” (International Finance Corporation, 2013).

According to what was said right now, smallholder farmers are in this context definable as a competitive advantage in the supply chain, if we think that the methods of sourcing raw materials and of primary production have been handing down from generation to generation and currently are considered the first step for the superior characteristics of many authentic Italian products.
1.2.2 Analysis of Food Chain actors.

![Diagram of the traditional food chain](image)

**FIG (1) Traditional way of viewing the food chain.**

- **Production Inputs and Farmers:**

“As at 24 October 2010, Italy had 1,630,420 farms operating on a Total Agricultural Area (TAA) exceeding 17.2 million hectares, and a Utilized Agricultural Area (UAA) of 12.8 million hectares. Census data confirmed the trend of larger average farm sizes, following a significant reduction in the number of farms (down 32.2% compared with 2000) and a more limited decrease in UAA (down 2.3%). Average UAA increased from 5.5 hectares in 2000 to 7.9 hectares in 2010. The largest decrease in the number of farms (down 40%) and UAA (down 9.5%) occurred in central Italy; in southern Italy, although the number of farms fell by almost 30%, UAA increased by 3.5%.”

Increasing production costs are one of the main causes of falling farm earnings potential nowadays, as may be seen from the proportion of farm production accounted for by intermediate inputs, a figure that has risen constantly over the last decade from 38.6% in 2001 to 47.6% in 2010. Prices have driven up costs for farmers, who over the last few years have tried restricting the intermediate input quantities. Feedstuffs and other livestock-related outlays were the cost component that had the greatest impact on overall intermediate inputs, followed by power and repurposing for farm use. Although it is true that prices increased the intermediate inputs, individual goods and services revealed a reverse trend. “The reduction in quantities is ascribable to keeping a closer eye on consumption, and to a reallocation of farm resources, for example, by focusing on less machine-dependent activities” (INEA, 2010).

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8 Data processing by Marco Amato in “Italian Agriculture, INEA 2010”.
9 Look at previous note
Food Industry has been giving of different means, such as the complex of each part of food supply chain. However, in this context, we are analyzing Food Industry, as the part of the chain where food processing happens.

“Food processing is the transformation of raw materials, by physical or chemical processes into food, or of food into other forms. Food processing combines raw food ingredients to produce marketable food products that can be easily prepared and served by the consumer.” (Bonetti, Hadjidimitriou, 2013)

There are several different ways in which food can be produced:

1. One off production: It is a method used when customers order something to be made to their own specifications. The time of production is directly proportional to the intricacy of the product.

2. Batch production: It’s a method used when the market demand is not clear, and where there is a range within a product line. A certain number of the same goods will be produced to make up a batch or run. This method takes in estimating consumer demand.

3. Mass production: It’s a method used when there is a mass market for a large number of identical products. The product passes from one stage of production to another along a production line.

4. Just-in-time production: It’s method of production mainly used in restaurants. All components of the product are available and the customer chooses what they want in the product. It’s a current production process.

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10 Food Processing Lesson Plan Johns Hopkins Bloomberg School of Public Health. April 7, 2015
**- Wholesaler and Retailers**

Italian legislation has supported the direct commercialization of agro-food products since the 1960s (Law no. 59 of 1963) until legislative decree no. 228 of 2013 in which there are specified the ways of direct and indirect selling (Alabrese, 2008).

The distribution of agro-food products, along the food chains, occurs through two different actors:

**Wholesaling:** “includes all the activities related to selling of goods and services to those people who are not ultimate buyers, but buy for resale or business use. They work as a link between the producers and the retailers. Wholesalers usually purchase goods in huge quantities and sell them to retailers in small loads. Besides this, they provide lots of other services to both the parties” (Archana Chauhan).

**Retailing:** “involves all the activities that are related to the sale of goods or services to the ultimate consumers, who use the product for himself and not for business purpose”. Retailers act as intermediary, who procure goods from wholesalers or producers and sell it to the final consumers. (Archana Chauhan). In Italy the regulations in force of Chamber of Commerce defines the wholesale as the business carried out by who, professionally, buys goods on his own and then sells them to other retailers or to professional users. This business could be identified either as national trading, import or as export\(^\text{11}\). Currently, the most relevant retailers correspond to wholesalers, so that the chain of distribution is made up with a vertical integration: the most important wholesaler and retailers in Italy are Coop, Conad, Esselunga, Carrefour, Auchan, MD-LD, Pam Panorama, Finiper, Bennet, Lidl and Eurospin. They make up the Italian L.R.O.\(^\text{12}\).

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**FIG (1.1) “Wholesalers: Meaning, Characteristics and Other Detail”, Prof. RC Agarwal.**

\(\text{11}\) (Art. 4-D.Lgs. n. 114/’98).

\(\text{12}\) L.R.O. (Large Retail Organization) stands for G.D.O. in Italian: it’s the system of the greatest structures, national and multinational, made up with retailing networks on the territory.
The consumer

According to Nelson classification model (1970), which was extended by Darby and Karni (1973) and Klein (1998), “the products was search, experience or credence, depending on whether the consumer can evaluate the products’ quality and their benefits before or after purchase”. The agro-alimentary products could be considered as experience goods, meaning that consumers are able to understand their qualitative level and their features only through a direct experience of consumption.

In the agro-system, the consumer seems more exacting and selective. His aim is to strengthen his personality through the food, and, for this reason, he is continuously looking for a higher quality of the product. The characteristics of an agro-food products searched by a consumer, and in particular by an Italian consumer, are quality, authenticity, health, safety and freshness of the products, and he’s also looking for a variety of time, ways, places where to consume the product.

- Quality

Speaking about quality needs to determine which concept has to be meant as quality. Quality is “the totality of characteristics of an entity that bear upon its ability to satisfy stated and implied needs” (ISO 138402, 1986).

The agro-food quality could be defined as the excellence degree of a product that includes appearance, texture, taste and aroma. This quality is also known as organoleptic quality and involves our five senses in order to express a judgment about:

1. The color, the dimensions and the structure of the product through the eyesight
2. The aroma and the fragrance of the product through the smell.
3. The texture of the product through the touch.
4. The bitter, the sweet, the salty and the sour of the product through the taste.
5. The freshness of the product through the hearing (chewing).

- Safety

By means of Amsterdam Treaty¹⁴, the importance of Consumer Safety, across the E.U. purposes, has become overriding, also thanks to art.153 Eur.Lex that declares:

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¹³ I.S.O: The International Organization for Standardization, an international standard-setting body composed of representatives from various national standards organizations.

¹⁴ The treaty was the result of negotiations that began in Messina, Sicily on 2 June 1995, nearly forty years after the signing of the Treaties of Rome, and reached completion in Amsterdam on 18 June 1997. Following the formal signing of the Treaty on 2 October 1997, the Member States engaged in an equally long and complex ratification process. The European Parliament
1. In order to promote the interests of consumers and to ensure a high level of consumer protection, the Community shall contribute to protecting the health, safety and economic interests of consumers, as well as to promoting their right to information, education and to organise themselves in order to safeguard their interests.

2. Consumer protection requirements shall be taken into account in defining and implementing other Community policies and activities.

3. The Community shall contribute to the attainment of the objectives referred to in paragraph 1 through:

(a) Measures adopted pursuant to Article 95 in the context of the completion of the internal market;

(b) Measures which support supplement and monitor the policy pursued by the Member States.”

Furthermore, there is something to say about the labeling of agro-food products that is one of the most awkward manufacturing phases: it involves the sale denomination (in particular with product characterized by a high innovation rate), the ingredients list, the application of nutritional indications and the determination of the shelf life. According to “Codex Alimentarius”, “food labeling is the primary means of communication between the producer and seller of food on one hand, and the purchaser and consumer of the other” (Codex Alimentarius GL 32-1999).

- Health: Italian consumers ‘trends

An interesting study (Vassallo et al. 2009) shows that Italian consumers tend to be influenced more by the health message concerning the reduction in disease risk. Furthermore, it is commonly known that Italy could boasts a way of eating based on the traditional foods (and drinks), known also as “Mediterranean Diet”. Even if Italy seems to have almost lost the tradition of the healthy food, outclassed by the trends of “fast food”, it is necessary to define this way of seeing and of eating food. Furthermore, another important milestone in the dissemination of its significance has been the inscription of the Mediterranean Diet in the List of Intangible Cultural Heritage of Humanity by UNESCO, in November 2010.

The name “Mediterranean Diet” arises from the consumptions ‘types in the Mediterranean zone, at the beginning of “Seven Countries Study”, and it’s inspired to the “sobriety rules” that go back to Latin and Greek agro-food system (Costantini, Cannella, 2006).

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15 Shelf-life: the length of time that a commodity may be stored without becoming unfit for use, consumption, or sale.

16 Codex Alimentarius: established by FAO and the World Health Organization in 1963 to develop harmonized international food standards, which protect consumer health and promote fair practices in food trade.

17 SCS: The first major study to investigate diet and lifestyle along with other risk factors
According to Orazio,

“Accipe nunc victus tenuis quae quantaque secum adferat. In primis valeas bene”.\(^{18}\)

“Now learn what and how great benefit a moderate diet brings with it. Before all, you will enjoy good health.”

According to what said before, careful consumers of agro-food system look for high quality products that have to be safe, and healthy. According to Mannheimer, in a survey managed by I.S.P.O.\(^{19}\), two Italians out of three declare to follow a healthy and correct Diet every day.

Furthermore, according to ISTAT (2009), there were registered great changes in the relationship between Italian consumers and agro-food products: the growth rate of food consumptions have been standing static. This is certainly related to the alimentary trends of this new decade: the reason of fullness, explained in the “Axioms of Consumer Preference\(^{20}\)”, has been covered by the trends of food quality and safety, well explained by PDO etc., whereof it is engaging in the second chapter.

- **Product: classification of Italian food**

Indeed, although the different meanings of Made in Italy that will be discussed in the following chapter, we can commonly refer to the qualitative idea of a product directly linked to its Italian origins, in terms of place of production and processing of the product, and to its exportability. Furthermore, it is important to remember the concept of the “Know How”, which consists of the transformation and realization of the product through a habitual and technological process in which Italy enjoys a prominent position thanks to its tradition and skills.

The first concept, relatively to agro-food Made in Italy, refers to the goods of the typical Italian alimentary production; the second one means “Know-How” as the transformation’s processes that benefit from the raw materials of the Italian agro-food system.

According to R. Henke, one of the latest classifications of agro-food Made in Italy takes into account all of the degrees of transformation of products that have been keeping their trade-balance positive at least for three years\(^{21}\). The items are then identified in three categories:

a) Farming Made in Italy

\(^{18}\) Horace, Sat. II, II

\(^{19}\) “Istituto per gli studi sulla pubblica opinione”


\(^{21}\) This classification has been provided by INEA, in 2010.
b) Transformed Made in Italy

c) Food Industry Made in Italy

The Farming Made in Italy includes fresh fruit and vegetables, rice and products of floriculture. The agro-farming market is characterised by legal limits to chemical residues\(^2\): the irregularities for these products have been relevant for Germany, Spain, France and overall Oland\(^3\). According to an analysis made by Coldiretti, fresh fruits and vegetables made in Italy are considered the safest and healthiest products on the international market. Coldiretti, in facts, pointed out that the totality of Italian samples, examined by “Ministero della Salute” and “Osservatorio Nazionale Residui”, resulted below legal limits. It certifies the highest quality of Italian farming products.

The Transformed Made in Italy includes wine, tomato sauce, cheeses, fruit juices, olive oil, vinegar and mineral water.

The Food Industry Made in Italy includes pasta, coffee, ice creams, confectionery products and spirits.

These kinds of products are differentiated upon their grade of transformation: for this reason, the farming products are known as “Tal Quali”, whereas transformed and industrial products are characterised by a main and growing role of the technology and the know-how.

In the case of Food industry, it seems appropriate to draw a distinction between two different categories.

a) Full Made in Italy, the products resulting by Italian raw materials and Italian industrial know-how.

b) Partial Made in Italy, the products resulting by foreign raw materials and Italian industrial know-how.

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\(^2\) Regulation (EC) No 396/2005 of the European Parliament and of the Council of 23 February 2005 on maximum residue levels of pesticides in or on food and feed of plant and animal origin and amending. The Regulation establishes the maximum quantities of pesticide residues permitted in products of animal or vegetable origin intended for human or animal consumption

\(^3\) The reference is to Coldiretti, the first Organization of farmers, in Italy and Europe. The information were taken from the European Commission.
1.3 FOOD EXPORT

1.3.1 Agro-food trading trends in Italy

The agro-food sector is a basic part of Italian trades in foreign markets, with a prominence of 9% in terms of export and import\(^{24}\).

The agro-food trading balance in Italy is generally negative, and this is related to the lack of fertile lots, and especially to the needs of raw materials ‘import for the transformed products industry.

So, the Italian agro-food trading balance involves two different things: the agricultural and farming trading balance, certainly negative, and agro-industrial trading balance that is constantly increasing. “It confirms that Italy has a strong trading specialization in agro-food system based on the transformation of farming products imported from foreign markets” (Henke, Salvioni, 2011).

In the last 10 years the agro-alimentary Italian export has been growing up twice as fast as total Italian export, reaching 35.8 billion $ in 2014. From 2004 to 2014, agro-alimentary industry has been increasing its export value by 83.8%; today, one out of two Italian industry, among 54,000, produces also for foreign markets.

According to “Federalimentare”, every year 1.2 billion people buy an Italian agro-alimentary product and 750 million out of these are loyalty-retailed.

In 2015, the agro-alimentary Italian export reached the record of 41.1 billion $: the items data are available thanks to an analysis of “Coldiretti”, based on final data by “Istat” relative to foreign trades in 2015. Roberto Moncalvo pointed out that agro-alimentary industry is the second most relevant manufacturing sector of “Made in Italy”, and it has a “pulling effect” on whole national economy thanks to the positive effects related to COI (Country of Image) onto foreign markets where food made in Italy is synonymous of quality.

The record reached by Italian made in Italy is due either to the positive economic conditions caused by an international recovery, either to favourable exchange rates, either to the experience of EXPO, which let Italy explaining to the world its agro-alimentary model with its unique values.

1.3.2 Geographical Distribution of Made in Italy

Statistics dating back to 2014, thanks to “Istat”, explain the distribution of products made in Italy exported upon their degrees of transformation: among different geographic areas, it pointed out the main role of UE-28, with 78% of export of farming products, 60% of transformed products and 65% of products by alimentary industry.

\(^{24}\) Data Inea 2011
- **Farming products**: from a dynamic point of view, there has been a downturn in purchases of farming by UE-28 (-6.2%), and by the other not Mediterranean European Countries (-17.1%), which are the benchmarking areas for the exportations of Italian farming products. There have been also significant positive changes for Middle and South Countries (+50.8%), Middle and South Africa (+48.3%), compared with the previous year.

- **Transformed products**: In the case of transformed products, there has been a decrease of exportations only in Oceania (-15.4%), and in North Africa (-1.2%), whereas there has been an increase of purchases by Mediterranean Asian Countries (+15.1%), by Middle and South America (+11.1%) and by European countries (+10%).

- **Food-industry products**: There has been an overall increase in the export of industry food products, apart from Middle and South America (-35.6%), North Africa (-17.5%) and Oceania (-13.3%). The greatest increase stressed of exportations of industry-food products is related to those designed to Mediterranean Asian Countries (+11.3%), Middle and South Africa (+9.7%) and not Mediterranean Asian Countries (+8.9%).

Export towards main Italian customers. FIG (1.3) Data provided by Istat, and found in “Commercio con l’estero dei prodotti agroalimentari, 2014”.

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25 The Report is the result of cooperation between CREA and Catholic University of Piacenza.
The export of made in Italy towards main 15 countries mainly pertain to transformed Made in Italy, followed by the export of alimentary-industry products. In absolute value, the main trading partners are Germany, France, USA and UK. As a percentage, farming Made in Italy weighs on total Made in Italy for 20% in Poland, Spain, Austria, Germany and Netherlands. The transformed Made in Italy is allocated mainly into not-EU markets, such as USA, Japan and Canada, whereas the alimentary-industry made in Italy is addressed to Spain, Russia, France, Netherlands and Poland.

In 2014, trading flows relative to agro-alimentary Italian balance show small changes compared to 2013, also in terms of weight of primary and industrial sector onto the overall agro-alimentary sector. From a dynamic point of view, it is therefore appropriate to use the differentiation upon degrees of transformation to set up a balance of the export for each different product.

- In the context of farming made in Italy, the cereals sector has been the only one to be marked by an increase of the export (+48%), and generally by a positive variation. The other sectors of farming Made in Italy, statistics pointed out decreases in the export, particularly in the fresh fruits sector (-3.8%).

- In the context of transformed Made in Italy, the most significant positive variation concerns the essences and flavours, with a relevant increase of the export (+29.8%). In terms of negative values, it is significant the sector of bulk wines, against the backdrop of decreases of the export (-17.8%), and, consequently, the competitive position of Italy decreases of 8% for this product. However, the sector of olive oil and transformed potato did not register consistent changes, with a net value of 1.9 billion $.

- In the context of food-industry Made in Italy, there have been highlighting good performances in all the products of the consortium, with an increase of the export, ranging from 3.8% to 7.6%, apart from spirits that lost about 8% of the export, compared to 2013.

1.3.3 Considerations about the Export: the help of Constant Market Share Analysis

The CMSA (Constant Market Share Analysis) is a method that analyzes the change in a country's trade through components that correspond to holding its market shares constant in several markets. The use of CMSA in an agro-food system provides several information. It is used in this study in order to better understand the reasons of Italian export variations. Usually, there are different factors able to affect the export of a Country, such as the client portfolio, the commodities specialization and the capability by the Country to adapt its production system to global demand.

In agro-food system, CMSA indicates the main factors that have been influencing Italian export. In the period 1996-2011, these factors showed five components that affect the Italian market share in the international agro-food market.
According to Iapadre, “the first factor that influenced Italian food export is known as Competitiveness Effect (CE)” (Iapadre, 2006). This factor has the main role to indicate Italian performance ex post on international markets from not only the prospective of amount exported, but also including the qualitative upgrading of the products exported.

The second component is the Commodities Specialization Effect (CSE), and it is used in order to “measure the influence of the market share of the importing client Countries on the export variations of the Country considered” (Anna Carbone, 2011). It means, for example, that Italian agro-food exportations are affected by changes of Italian customers’s import share.

The third component, known as Geographical Specialization Effect (GSE), is related to the geographical trend of the exportations. Therefore, it indicates the relationship between the geographical distribution of the export of a Country and the distribution of the international Demand. Higher the factor, higher is the capability of a Country to place the exporting products where the demand is more dynamic. It means, for example, that it is possible to understand if Italy directed its export to not-growing markets (Countries).

The fourth component, known as “SIE”, is the effect of interaction between the factors of specialization mentioned before. It means, for example, that this effect indicates if Italy has been able to direct its products to Countries where the demand of those products is high and dynamic.

The fifth component is known as EA, and it indicates the dynamic capability by the Country to adapt the export to the international demand of those products. It means that this factor specifies if Italy has been able to modify its products portfolio across the variation of the consumption’s trends.

*The Results*

The data shared have been taken from “L’agroalimentare Italiano nel Commercio Mondiale”. Anna Carbone has analyzed them, expounding data of “Un-Comtrade, World Bank”.

1. The competitiveness effect in the period between 2006 and 2011 indicated that Italian competitiveness in the export has been drastically decreasing. The negative trend influenced the totality of E.U. Countries, except from Spain and Oland. Focusing on Italy, the loss of competitiveness is the factor that most represents the Italian decreasing export in the international agro-food context.

2. The Commodities Specialization Effect analysis has revealed negative results related to the fact that the international demand in the context of agro-food system has been increasing only for farming and agricultural products, that Italy is used to import, whereas the demand of Italian strengths ‘products, such as wine, pasta , transformed coffee and fresh fruit, has been decreasing. It

\[26\] Main Italian customers mentioned in previous graphics.
is no coincidence that, for example, the North America (Canada in particular) has a high CSE, because it is one of the largest exporters of wheat and flour.

3. In the context of Geographical Specialization Effect, Italy has achieved neither positive nor negative results. In facts, the analysis of this factor confirmed Italian difficulty to reach new markets, far from itself and with a different institutional and political framework. These factors represent nowadays-important difficulties for our companies that seem not to be able to open negotiations with foreign countries without Government support. In fact, our system, characterized by small and medium businesses, finds difficult to build network, clusters of innovation and industrial districts in order to become more competitive on international markets.

The international position of our Country, analyzed by CMSA, indicates that the partial growth of Italian exportations pulled by international growth of agro-industry products ‘demand seems not to be followed by Italian enterprises. The opportunity, between factors explained before, has to be considered in the context of Commodities Specialization Effect; Italy has to achieve an economic take-off in the export of agro-food through Made in Italy:

2. Country of Origin

The preliminary studies about “Country of Origin” date back to the second half of 20th century, and they have been developed by Schooler, in 1965\textsuperscript{27}: he tried to demonstrate the existence of real effects on consumers ‘behavior related to the country of origin of the products consumed. Reierson, confirmed these studies in 1966, through similar studies conducted on a cross-section of 155 American students, who revealed to prefer their own country products to consume.

The first definition of Country of Origin is attributed to Nagashima, who defined the effects related to C.O.O. as “the picture, the reputation and the stereotype that businessmen and consumers attach to products of a specific country” (Nagashima, 1970).

During the period from 1993 to 2004 a large number of studies has been realized in order to conceptualize the evolution of COO.

In 1993, the approaches to the COO studies by Papadopoulos and Heslop (1993) gave a relevant contribution to the country-of-origin literature by criticising the concept of country-of-origin as being confusing and misleading, if considering the case of “country of origin for a product where it has been manufactured in, but designed, assembled, branded in another country”. In order to take into account the dualism of brand, image of a product from a specified country and the effective places/countries involved in the production system, Papadopoulos suggested the term “Product-Country Image\textsuperscript{28}”.

These definitions and studies helped to understand the link between the Country of Origin and Brand evaluation, meaning that COO offer brands a significant competitive advantage, such as perceived quality, familiarity with a product and relationship with the territory. The connection between the COO and the Brand evaluation is explained below through the concept of COB.

2.1. Country of Origin of Brand

First, it is important to define the Country of Origin Brand as “the place, region or country to which the brand is perceived to belong by its target consumers”, according to Thakor and Kohli (1996). This definition was surely given in order to take into account not only the production’s point viewpoint, but also the consumption of a specified product. Recently, the relation between brand and COO has been examined from a new side. Indeed, greater emphasis has been given to which kind of benefits the brand is able to bring to consumers’ mind rather than the ordinary place where the production of these products occurs. Definitely, it has been gradually given much more importance to the “Brand of Origin” concept that somehow has overcome the traditional paradigm of Country of Origin. This relevance assumed by the Brand of Origin is

\textsuperscript{27} In 1965 Schooler made this kind of experiment: he made some students from Guatemala evaluate the quality of same products made in different countries: the study pointed out that the students preferred the products from their Country of origin.

\textsuperscript{28} Product-Country Images was the title of the book written by Papadopoulos and Heslop, in 1993.
due to a “twin reason”: first, nowadays the concept of Brand tends to bring together information about territory, production, culture, design and manufacturing under a single “business” meaning. Secondly, through the concept of Brand of Origin it is also possible to identify and evaluate the quality of this information, in order to analyse any distortive effects on consumers’ behaviour.

In facts, it’s currently possible that the information, the consumer is given of, are lacking and insufficient and allow him to perceive wrongly brand positioning, defined as “the act of designing the company's offer and image so that it occupies a distinct and valued place in the target consumer's mind” (Keller, 2011).

Therefore, there is a theme of “Consumer Awareness” (Samiee, 2005; Balabanis e Diamantopoulos, 2008), related to the incapability by the consumer to recognize the real Country of Origin of the product. In particular, it is related also to the general willingness by companies to implement marketing strategies that should create promotional and communication policies designed to reinforce the relationship between brand image and product quality, “making the Country of Manufacturing²⁹ unimportant at all” (Clarke, 2000).

In this context, the globalization, and the consistent trend by current companies to phase the production processes in several geographical areas, made the perception about the product’s origin more difficult to define, so that “the effectiveness of the studies about C.O.O. has been running down” (Phau and Prendergast, 1998).

Furthermore, as said in the first chapter, the economic crisis of 2008 increased the consumer awareness in the home-economics improvement through purchasing local products: “in this context, people seem motivated to choose national/local products, making the country of manufacturing relevant again” (Dmitrovic and Vida, 2010). However, according to Adehn and Berg, the concept of Country of Origin has to be replaced by the concept of Place of Origin³⁰, related to a geographical area able to make consumers perceive images and emotions useful to enhance the product connected to that area. These approaches to COB focused informational cue on the country of origin of a product, usually communicated by the phrase “Made in”. This changed perspective is related to the fact that the “Made in” associated to a country involves more cultural, productive, historical information than in a specific geographical cluster.

The specific case that will be below analysed is the Italian Brand of Origin, commonly known as Made in Italy.

²⁹ The country where the product is manufactured” (Hamzaoui e Merunka, 2006)
³⁰ The totality of regions, (Ittersum, Candel and Meulenberg, 2003), districts (Guerini and Uslenghi, 2006) or towns (Lentz, Holzmuller and Wangenheim, 2006).
2.2 Made in Italy

National producers have firstly used “Made in Italy” in order to indicate the Country of Origin of the product. Through the studies discussed before, people started to mean Made in Italy as a brand that has been becoming particularly prominent, because of the huge investments in making the products ‘quality higher. Consequently, it lost the real meaning and purpose of indicating esthetical and distinctive icons related to the origin of the product: “consumers started to perceive Made in Italy as an international symbol of high quality” (Fabio Antonacchio, 2007). Now it seems necessary to characterize strongly and univocally the Made in Italy, using some Italian legal definitions.

For this purpose, before to analyse the regulations about the legal application of the brand of origin (Made in Italy), it seems useful to identify the correct meaning of some expressions:

- “Origine”: it means the indication of the place where the raw material has been breeding, farming or fishing.
- “Provenienza”: it means the last factory where the product has been manufacturing and/or stocked.

Now we need to introduce the expressions related to imported goods from foreign countries that are divided in:

- “Origine doganale preferenziale”: it concerns the imported products that meet specific requirements and it consists in granting beneficial import duties, such as tariff reduction and prohibition of quantitative restrictions. This means that E.U. signed an agreement with the “Associated Countries” whereby provision is made for a “preferential treatment” for trading specific products characterised by the origin from one of the Countries Parties.

- “Origine doganale non preferenziale”: it means the place of production, or where the product was ended. A product must be lastly processing in Italy, irrespective of the rates of national or foreign materials used in the production, in order to be provided with the “Origine non preferenziale italiana”.

Therefore, the Made in Italy is certainly a brand of origin that is “an indication that gives the product’s origin to our Country in order to enable the consumers to make a distinction between national and imported goods” (Selena Pellegrini, 2016). It could be marked on products that result made:

1. Entirely in Italy.
2. Party in Italy and partly in foreign Countries.

31 The words below have been expressing in Italian because of their similarity in our language: in English, there are not words that make this dualism comprehensible through using two similar words.
This principle gets back to the intervention of Ministry of Finance in 1995 with regard to the undertakings given by Italy in committee of W.T.O.\textsuperscript{32} and it has been restated by the art. 4 par. 49 Law 24/12/2003 n° 350 (2004). In the second case, the specification of the method and the standard of “Origine doganale non preferenziale” helps producers to mark a product with “Made in Italy” and the consumers to recognize it, in accordance with Regulation CE 23/04/2008 n°450, art 36.

However, the legislation above provides neither indications nor examples about defining standards for “sufficient working or processing”. In this field reference is made to the “Agreement on Rules of Origin”, whereby the possibility to use the marking “Made in” is subject to prior approval by bilateral or multilateral Agreements on rules of Origin reached by E.U. with non-member Countries. Another instrument called B.O.I. “Binding Origin Information” could clear up any doubts about the attribution of C.O.O.

Today, in accordance with D.L. 25/09/2009 n°135, consumers are able to recognize the “Customs Made in Italy” (51% of Italian raw materials and finishing) and 100% Made in Italy (product fully processed in Italy). Furthermore, in accordance with the Certification System “IT01-100% Italian Quality”, drawn up by I.T.P.I.\textsuperscript{33}, products made in Italy have to be:

- Made in compliance with safety criteria;
- Made in compliance with hygiene rules.

The issue of Country of Origin and Brand of Origin has a historic and economic relevant significance in the context of agro-food system; Italy, in facts, has been working hard in order to protect its agro-food products, considered unique all over the world.

### 2.3 The origin of Agro-food products Made in Italy

Nowadays, the agro-food system made in Italy needs more and more to communicate quality. In the agro-food market, as said in the previous chapter, consumers are looking for becoming more and more informed about what they eat, and it seems difficult to them to understand well this kind of information. The E.U. has to play a main role in restricting information asymmetries that this market creates in support of a supply that does not care about the quality of the food.

\textsuperscript{32} World Trade Organization: is an intergovernmental organization which regulates international trade. The WTO officially commenced on 1 January 1995 under the Marrakesh Agreement, signed by 123 nations on 15 April 1994, replacing the General Agreement on Tariffs and Trade (GATT), which commenced in 1948.

\textsuperscript{33} “Istituto per la Tutela dei Produttori Italiani”

2.3.1 European Quality Schemes

From the Law n°125/1954, Italy has always been enthusiast about the protection of designations of origin, in particular in the sector of cheeses that have recognised the designations of “Fontina, Gorgonzola, Grana Padano, Parmigiano Reggiano, Pecorino Romano e Pecorino Siciliano”. Then, the regulation CEE n°2081/1992 has introduced a system of registration and legal protection of the designations of origin and of geographical indications about agro-food products. According to C.M. Pellicano, “the aim is to provide the agro-food system new diversification methods in order to protect and maintain the farming entities and the specific local features”.

The system of geographical indications ensures the protection of intellectual property. This system includes designations that describe the characteristics or the reputation of a product, which are related to their geographical area of origin. For consumers, geographical indications guarantee authentic, quality products, which meet their expectations.

The protected designations constituted in the Reg. CE n°510/2006 are in accordance with

Article 2: Designation of origin and geographical indication

a) ‘designation of origin’ means the name of a region, a specific place or, in exceptional cases, a country, used to describe an agricultural product or a foodstuff:

- originating in that region, specific place or country,
- the quality or characteristics of which are essentially or exclusively due to a particular geographical environment with its inherent natural and human factors, and
- the production, processing and preparation of which take place in the defined geographical area;

b) ‘geographical indication’ means the name of a region, a specific place or, in exceptional cases, a country, used to describe an agricultural product or a foodstuff:

- originating in that region, specific place or country, and

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34 The Commission decided to launch a reflection to improve the European quality policy. To do so, it wanted to first get the opinion of stakeholders. For that reason, the Commission released, on 15 October 2008, a Green Paper asking open questions on the different issues related to quality.
which possesses a specific quality, reputation or other characteristics attributable to that geographical origin, and
- the production and/or processing and/or preparation of which take place in the defined geographical area.

According to the article above, in order to obtain a P.D.O., the product has to be completely made of raw materials coming from the production area and transformed there. However, the P.G.I is characterised by a weaker link with the territory, because of the lack of raw materials 'constraint.

The getting of these two designations is due to two kinds of relationship with the territory:

1) a technical description of the link between the territory and the quality (or other features of the product) in the case of P.D.O., or a specified quality, the reputation (or other features of the product) in the case of P.G.I.

2) a historic description, with the necessary references, in order to prove the intellectual property at least for 25 years. This document is a socio-economic report that involves information about the product and the supply chain, the quantity produced and the productive potential of the territory, number of companies involved (with a distinction through chains), and the demand of the product.

Until 2010, the P.D.O. designation involves a designation of Italian origin called C.D.O\textsuperscript{35}. This designation was used in Italy in order to certificate the origin area and the relationship between the product and the nature. In particular, C.D.O. and G.C.D.O.\textsuperscript{36} aimed to make the Italian wines’ production exclusive; in facts the wines given of these designations have always been subject of thorough chemicals analysis. Reg. CEE 823/87, Law n. 164/92 and D.P.R. n. 348/94, regulates the production and trading of these wines.

Another European quality scheme is the system of Traditional Specialities Guaranteed (T.S.G.). This designation lies exclusively with the products transformed by raw materials that have been traditionally using or through a method of production at least for 30 years. Since its creation, only 20 TSGs have been registered under this system. This relatively low number raises the question whether a better means of identifying and promoting traditional specialities exists. Italian examples are “Mozzarella” and the “Pizza”.

\textsuperscript{35} Controlled Designation of Origin.
\textsuperscript{36} Guaranteed and Controlled Designation of Origin.
Images of European designations “PDO, PGI, TSG”.

The achievement of a European designation, such as PDO, PGI and TSG, is not an easy process, it could last at least one year, and it gets through several levels (Producer-group, National and European): furthermore, it differs if the designation has to be assigned to a non-EU product. Below, there are represented the main phases for the achievement of designations. It has been made up according to “European Commission, Agriculture and Rural Development, Quality Policy”.

FIG. (2): Phases to acquire European Designations.
To introduce other characters of Made in Italy, it is necessary to analyse them through the legislative framework, explained and represented above, that is a useful method and instrument in order to recognise agro-food products made in Italy. In facts, the presence of designations on an agro-food product is a guarantee for the consumer who wants to consume an Italian product.

From a cultural and innovative point of view, there is something else to say about the recognition of a product made in Italy. Effectively, when one of our products starts the process of designation that we described before, it means that it is not only the mere product to apply for being protected, but also the amount of intrinsic values in such product. According to Selena Pellegrini, the totality of these intrinsic values could be analysed, as though they constituted a unique “X Factor”.

### 2.3.2 X Factor in a product Made in Italy

According to F. Morace and B. Santoro, “all the made in Italy products have a unique greatest common divisor (G.C.D.), a kind of valuable codex that does not only consist of raw materials from the “origin or the place where they have been designing, assembling and processing”. Selena Pellegrini, the author of “Marketing of Made in Italy”, confirms that a product made in Italy is something that “runs through Italian veins, that is able to involve every single moment or aspect, from the designing to the processing”. It is a mix of several elements such as territory, social and economic history, art and culture, architecture, tradition and creativity. According to Guerini, the x factor in a Made in Italy product is the “Italian spirit”, as we can consider it as “a brand able to be broken semantically down in a complex made of different features, sensorial, emotional and rational”. The main character that makes this system harmonised, is certainly Italian know-how: it means the tacit knowledge of Italian designers, a centuries’ experiences result, the esthetical tradition and the practical skills.

Therefore, the problem is about understanding the necessary condition to trigger a mental representation of “Italian spirit” in consumers’ mind. The consideration, mostly and commonly accepted, concerns the fact that consumers usually associate the behaviour and the attitudes that include the Italian style, history, territory and social life, without considering the country of production/design of the product. Furthermore, this is the reason why, according to the “Prospect Theory” by Daniel Kahneman\(^{37}\), companies try to imitate Italian attitudes in order to exploit positive externalities produced by the Made in Italy.

For this reason, we are going to mention the “4-P” by Jerome McCarth (Price, Product, Promotion and Place), in order to define another “P-element” that, according to S. Pellegrini, is the “Patrimony”.

\(^{37}\) In 2002, winner of the Nobel Memorial Prize in Economic Sciences (shared with Vernon L. Smith). His empirical findings challenge the assumption of human rationality prevailing in modern economic theory.
This introduction to Patrimony is useful to understand about what Italy should differentiate its C.O.B. In fact, any brand in the world pays special attention to the Product, the Price, the Placement and the Promotion; but it is the heritage (Patrimony) of values, coming from our history, culture and identity to create the “genius loci”, that is neither a global property nor something possible to imitate.

Furthermore, another relevant point made in Italy wants to focus on and differentiate through, is the “Engagement”. In facts, an Italian main feature is the high facility to communicate and to interact with people. The Customer Experience\textsuperscript{38} takes on a main role in order to analyse how the potential consumer deals with the brand. In this context, it seems relevant to measure:

1. The amount of “Italian style” in the brand.
2. The moment when our customer becomes aware about choosing a made in Italy product.
3. The values associated to the Italian style of the product.

As regards these concepts, according to G. Corbetta, “the Italian target is a demanding and careful examiner of the supply: Italians have developed through ages a great aesthetic sensitivity. For this reason a lack of Italian style for an Italian target means a failure above all the countries”. Contrary to this, a foreign target is less demanding, because of the not developed capability to recognise the beauties. “Italian” is quality, elegance and luxury to him, so that C.I.E. (Customer Italian Experience) is of course an opportunity to understand easier the intrinsic values to the product.

\textsuperscript{38} The Customer Experience is the “subjective response customers have to direct or indirect contact with a company” (Meyer and Schwager, Harvard Business Review, 2007).
3. The Misperception of Brand Origin

Recent COO researches showed that consumers often do not know the true origin of many (even well-known) brands and that they frequently associate a brand to the wrong COO. According to Samiee and Sharma (2005), a research about the correct association of the brand to its COO made in U.S.A. demonstrated the correct identification rated only 49% for several American brands and 22% from other different countries. Other several authors made this kind of research, and all of them indicated how the correct origin identification rates do not reach the 50%. Although these studies could also give information about the main features of a country that makes consumers able to recognise it, the fact that consumers could have based their evaluation on a product with wrong COO perceived, indicates that their evaluation could have been different, if based on an other COO. Balabianis and Diamantopulos have highlighted this problem in 2011, and on this study, it is based the relevance got by the Country Sound Branding.

Zhou, Yang and Hui observe, in facts, how the information about COO of several brands could not always be available, either because global competitors want to disguise their Brand of Origin, either because the companies ‘globalization and the international acquisition of the brands makes the COO hard to be identified. So these “misunderstandings” by the consumer may have positive and negative effects: marketing literature has particularly addressed issues about the wrong and negative perceptions, known as “misclassification or misinterpretation”. There have been then pointing out two kinds of brand origin misclassification, or, according to Balabianis and Diamantopulos, “the wrong COO category”:

- **Adverse Misclassification**: it occurs when the brand origin perceived is related to a Country that has an image (COI) worse than the real Country of Origin, in a specific product category.

- **Favourable Misclassification**: it occurs when the brand origin perceived is related to a Country that has an image greater than the one of the real Country of Origin.

When companies try to produce a favourable misclassification, we talk about “Country Sound Branding”: “the evidence of this phenomenon indicates how weaker and less well-known brands have significant advantages through the second condition, whereas strong brands companies endure the disadvantages of the second (Ahmed, 2002)”. 
3.1 Italian Sounding

As mentioned before, the Country Sound Branding indicates a brand strategy that has the aim to draw the consumer’s attention on a COO not real, but positive because of the acceptance of company’s offer. There are two framework conditions to make this strategy efficient:

a) A COI positive related to the products category covered by the strategy;

b) The capability by the consumer to recognise a COO related to the strategy

In the previous chapter, we have been dwelling a lot on the values, images and feelings perceived by a consumer that buys a made in Italy product. If we link these concepts intrinsic of made in Italy to Italian agro-food system and its potential, we can analyse the phenomenon of Italian Sounding. The Italian Sounding identifies several ways and categories of imitation, based on diverse features that represent the reference to Italy and on their ambiguity/clarity towards consumers.

Just the use of a not registered recipe of Italian origin could represent one of this ways. Through using this method of imitation, it is possible to refer to our Country more or less strongly and ambiguously. For example, when “Bolognese Sauce” is written on a product’s label (in order to indicate the Italian ragout), it may be clarified that the reference concerns only the recipe: therefore, consumers may not be led to think about a product really originated in Italy, also because these recipes often do not involve real Italian elements (such as nutritional values). However, the use of Italian recipes cannot be forbidden (even if it is really originated in Italy).

Another method of imitation and improper reference to Italy occurs when a product involves graphical and photographical symbols that summon clearly our COI in consumer’s perception, such as our flag’s colours, the “boot” as Italy’s shape, or even images that refer clearly to Italian monuments or localities.

An additional method of Italian Sounding consists of using Italian names, such as Italian brands or names of Italian manufactures, even registered legally outside Italy, or Italian surnames in order to identify companies founded by Italian people migrated from Italy, with whom every manufacturing link has been lost. Furthermore, Italian sounding products are designated with generic names of Italian products, such as “spaghetti” and “pizza”, in order to summon the COO without having any contact with the Italian manufacture and production. These names usually are referred only to Italian recipes, rather than a product, even if it differs deeply from the original recipe. The variability of these elements used by the foreign producer, in order to raise the wrong consumers’ perception, makes clearly difficult any legal action by Italian companies. This is considered extremely “immoral”, according to Gabriele Canali, because the

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39 This is due to the fact that “Names that have become generic may not be registered” as P.D.O. or P.G.I, according to Article 3 REG CE 510/2006.
reference to an Italian recipe is more difficult to be fought against, since the fact that Italian names have been becoming really generic.

In the case that the references to our Country are more evident and clearer, there is an issue technically more critical. An example regards the products marked with the Italian flag, or with names of Italian town, regions, and localities. The entity of the CSB, in this matter, may seriously undermine the consumers as regards the perception of the attributes in the product they are buying. Usually different methods tend to mark together and simultaneously an Italian sounded product.

In this case, the intention to imitate sounds clearer and more explicit and it could be considered as an abuse of agro-food Italian products’ brands in favour of products with many different features that often are of low quality. It points out a deceptive voluntary action towards consumers and incorrect and unfair towards Italian producers in terms of competition.

It is usual to connect the issue of Italian sounding to other issues related to food safety and to commercial frauds including counterfeiting, with negative consequences for products made in Italy, either on the national either on the international and global market.

In the report “Sulla Contraffazione nel Settore Agroalimentare”, drawn up by the “Chamber of Deputies” in 2011, there have been indicated the estimated values of the phenomenon: in 2009 the trade of products that resulted “Italian sounded” was about 60 billion €. This amount seems definitely high if it is compared with the values of Italian agro-food export. According to the report mentioned before, the statistics about the geographical distribution of this phenomenon concerns: 24 billion € in the North-America, 26 billion € in Europe, and the other 10 billion € in the rest of the world. It is interesting to compare these data with the statistics about the export given in the first chapter.

According to G. Canali, if this comparison is made, it’s achieved a kind of “Imitation Rate Index”40, by whom it is possible to get indirect information about the reputation and appreciation of Italian agro-food products (even if imitated). It could be useful in order to indicate the growth of the demand not completely met by the capability of products made in Italy to penetrate foreign market where the real Made in Italy cannot arrive. The reasons why the development of made in Italy is not so dynamic are several, such as the incapability of our companies to export, or the existence of restrictive measures and protectionist regulations, or even the lack of protection of Competition.

40 According to data analysed in the first chapter, this index amounts respectively to 8 for North America, 2 for Europe and 2.5 for the rest of the world. It means that the market value of Italian sounding products is 8-2.5-2 times greater than the market value of made in Italy agro-food products’ export.
3.1.2 An Italian Sounding Experience: the “Parmesan”

The Italian sounding affects the most representative products of agro-food national identity. Because of the high quantity of famous and enjoyable products made in Italy, hundreds of imitation resulted. They concern both farming, both transformed and agro-industrial products. Examples may be made “a dime a dozen” in all of the nations involved in E.U. or U.S.A. During the “International Forum on Agriculture and Food” in 2012, an analysis made by Coldiretti reported: the “Spicy thai Pesto” from U.S.A, “Parma Salami” from Mexico, “Sicilian Mortadela” from Brazil, “Salami Calabrese” produced in Canada, “Barbera Bianco” from Romania or “Chianti” from California, the “Provolone” from Wisconsin, the “Palenta” from Croatia, “San Marzano-Arrabbiata Sauce” from U.S.A and the “Bella Famiglia Tomato Bruschetta” from U.S.A.

A greater prominence has to be given to Italian Sounding cheeses, as well as “Parmigiano Reggiano” and “Grana Padano” are the most well-known and exported fake made in Italy products in the world.

The European Court (Grand Chamber) has ruled on 26th February 2008, appealing to European Commission, the case supported by Italy and Czech Republic against Germany, supported by Denmark and Austria. The case was about the use, by Germany, of the designation “Parmesan” in labelling products not corresponding to P.D.O. (Protected Designations of Origin) “Parmigiano Reggiano”. The issue was about establishing if, in accordance with P.D.O, the use of the designation “Parmesan” could fall within the cases covered under the Article 13, n°1 Reg. 2081/92, that is if it could be identified as a misuse, imitation or a summoning of the Italian P.D.O. The reasons supported by Italy were about the fact that consumers could be lead to think about “Parmigiano Reggiano” when purchasing the “Parmesan”. In facts, the similarities between the designations are unquestionable, both for the phonetics and for images, both for the conceptual similarities. The Federal Republic of Germany tried to demonstrate the contrary supporting that the designation “Parmesan” would have become “generic” that had not to be registered in accordance to art. 3 Reg. 2081/92. As said before, and as mentioned in the second chapter, the assessment of generic designations takes into account several elements. For example, it considers the place of production (either inside the member-state that obtained the registration, either outside it), its consumption, the way consumers perceive the designation and the existence of a specific national law related to that product compared with the way this designation is used in Community Legislation. However, Germany did not achieve its aim and, from the documents lodged, it occurred that several deutsche producers marketed the “Parmesan” with Italian labels that summon cultural traditions and Italian landscapes. It demonstrated that the consumers could perceive the product such as a cheese connected to Italy, even if produced in another Country. The use of term “Parmesan” for cheeses not
complied with the designation P.D.O has been considered detrimental to the protection of registered designations enshrined in the Reg. 2081/92.

The judgement concluded in favour of Italy, but there was something else not solved, despite this case. In facts, it is true that Member-States have to create a system of control in order to guarantee the effectiveness of Community laws, but the Court specified that it is an issue of the Member-States whereby the designations come from, and not where P.D.O. is summoned or imitated. It means that the judgement did not recognise a real duty of control by the State where producers use improperly the designation.

\[FIG. (3): “Parmesan”\]

In particular, there were three necessary principles pointed out by the Court’s judgement:

1) “According to the Commission, the marketing under the name ‘Parmesan’ of cheese which does not comply with the specification for the PDO ‘Parmigiano Reggiano’ constitutes an infringement of Article 13(1)(b) of Regulation No 2081/92, since the term ‘Parmesan’ is the correct translation of the PDO ‘Parmigiano Reggiano’. The translation, like the PDO in the language of the Member State which obtained registration of that designation, is exclusively reserved for products which comply with the specification”.

2) “The Commission adds that, as shown by the close connection which evolved historically between the specific geographic region of Italy where that type of cheese comes from and the term ‘Parmesan’, the term is not a generic name which can be distinguished from the PDO ‘Parmigiano Reggiano’. In any case, use of the name ‘Parmesan’ for a cheese which does not comply with the specification for the PDO ‘Parmigiano Reggiano’ constitutes an evocation of that PDO, which is prohibited by Article 13(1)(b) of Regulation No 2081/92”.

3) The Supervisory Bodies who are required to ensure respect of PDO are the Member-States from whom the PDO comes.
In the light of the above, both E.U. both the member-states where it occurs phenomenon of Italian Sounding are not responsible for the control of imitations and cribbing products on the national and international market. The conclusion that we could draw from this experience is that Italian Sounding is a phenomenon that actually seems to hard and difficult to prevent and it is steadily increasing.

For this reason, some authors and Italian economists believe that Italian Sounding could be also a growth-opportunity for Italy and for its agro-food system to become more famous and to increase its export. Furthermore, it will be proposed below an analysis of the point of strengths, weaknesses, opportunities and the threats of this Country Brand Strategy.

### 3.2 The S.W.O.T. Analysis

S.W.O.T. analysis is an acronym for Strengths, Weaknesses, Opportunities and Threats. It is an instruments currently used in the formulation and evaluation of a strategy; its creation is given to Albert Humphrey, between 1960 and 1970, during a research project for University of Stanford. When a SWOT analysis has to be made, it is usually built on four questions, of which the answers are useful in order to understand positive and negative effects:

- How is it possible to use and exploit the strengths?
- How is it possible to improve the weaknesses?
- How is it possible to benefit from the opportunities?
- How is it possible to reduce the threats?

*FIG (3.1):* Representation of SWOT Analysis.
In the agro-food system, the SWOT Analysis seems to be a useful instrument to compare the actual advantages of Italy and the points where our Country has to improve. This study will use either the information given in the first chapter, in order to analyse the strengths and the weaknesses in whole the Italian agro-food system. The phenomenon of Italian Sounding will be analysed as threat or as opportunity of Italian agro-food system. In facts, Italian Sounding has been analysed by lots of professor, economists and marketing phycologists and they demonstrated different views about it, giving positive and negative arguments about the phenomenon. Our aim will be, first, to point out actual main strengths and weaknesses in the sector, and to try to indicate if the advantages for Italian companies are higher than the disadvantages caused by the Country Sound Branding strategies of the foreign companies (Italian Sounding).

- The S (Strengths): The focus on the strengths of Italian agro-food system means to try to point out the actual (and not potential) vantages that this sector brings to Italy. On the basis of information given in the first chapter, our products ‘characteristics constitute main strengths of Italian agro-food system. These main Italian characteristics are identified as Quality, Health and Safety. Quality of our products is certainly considered as a strength: appearance, texture, taste and aroma of Italian products are unique and highly regarded all over the world. For what concerns the health, Italian dishes have been applauded for the ability to help with some chronic diseases, provide some anti-ageing benefits and are the source of various healthy nutrients. Furthermore, people have become weight conscious than ever – weight is directly related to some of the most prevalent diseases of the century like obesity and heart disease. The traditional Italian foods with low calorie content include spinach, tomatoes, leafy greens, garlic, onions and citrus fruits, alongside the traditional lean meat and oily fish included in many traditional dishes. Traditional Italian foods are largely healthy choices, and form an important part of a balanced diet. Additionally, in Italy, regulations and directives of the European Union considers food safety issues almost exclusively. The instrument used to indicate food safety is the labeling. It is the primary means of communication between the producer and consumer. For this reason, people that consume Italian authentic food can rely on its labelling to have a perfect traceability of the product. Other Italian strengths are of course the high-brand reputation, because of the excellent perception by consumers about food made in Italy related exactly to the characteristics mentioned before. Another strength that has not been highlighted during this study is Italian agro products prices. This strength connects the price to the concept of quality of our products. In other countries, people usually pay a premium price for Italian food. For this reason, the best way for our companies to make people pay off for their products is to “talk” about products’ quality history. Pellegrini (2016), in facts, indicates the “storytelling” as the way through Italian companies could improve the main strength of our products (high quality given by traditional production processes) in order to increase customers’ reserve price.
The W (Weaknesses): The weaknesses in agro-food system made in are not few. Referring to the CMSA in the first chapter, we can immediately indicate several weaknesses. The lack of farming lands does not let Italy grow in the subsector of farming products. We have seen through CSE\textsuperscript{41} that Italy is much stronger in exporting transformed and food-industry products. Our companies are not able to satisfy international demand of farming products: this factor constitutes an important weakness. Furthermore, Italian agribusiness system is persistently penalised by many constraints related to the lack of cooperation in food chains. For example, the small size of farms and firms and scarce attitude/tradition in cooperation sector point out the absence of any effective coordination action for such a complex chain structure. Furthermore, Italy currently registers “insufficient funds for public research in food sector as well as inadequate incentives to private research” (Carbone, 2012). Additionally, the “Distance” has a relevance in listing and explaining Italian weaknesses in this sector. According to GSE in the first chapter, Italian exports often cannot reach some countries that result too far from our country. This weakness is certainly due to delays in the modernisation of the legislation on the retail sector. Altogether, these factors have contributed to determine insufficient investments in R&D and lack of large globalised retail chains able to compete with those of major competitors’ countries that benefit from worldwide retail chain that convey and push national production in foreign markets. Then, in order to make a comparison with the “strengths”, there are still difficulties in defining and coordinating strategies to promote the reputation of ‘Made in Italy’ food through opinion leaders and chain actors. Finally, it seems right and useful to point weaknesses related to the Italian Sounding out. According to Censis, about 54 billion € are embezzled to Italy every year. In terms of employment, the damages to legal economy has been identified for 110,000 full-time work units lost, or better not activated, if we refer to the totality of imitated products. Furthermore, in terms of collection of direct and indirect taxes, the damage amounts to 1.7 billion €, if we only refer to the ending products: the damage would reach 4.6 billion €, considering each part of the supply chain.

The O (Opportunities): The opportunities explained in the following paragraph refer to advantages that Italy could take, based on actual market conditions and on the phenomenon of Italian Sounding. According to what said in the “strengths”, an Italian opportunity to make agro-food sector grow is, of course, the communication. Our Country should improve its marketing communication in foreign markets, trying to make foreign consumers aware about the high quality of made in Italy products. Furthermore, according to the “CSE”, Italian opportunities in an international context could be better identified through deeply researching the demand of specific products abroad. Italy should, for this reason, focus on countries that are currently demanding for transformed and agro-industry products, in spite of countries demanding for farming and agricultural products. Then, in order to analyse the opportunities that Italian agro-food system could take thanks to Italian Sounding products, we will

\textsuperscript{41} Commodities Specialization Effect
introduce the dissertation of M. Bruni. Italian Sounding let small and medium-sized enterprises be provided of many “hidden promoters” of our quality; this is a potential advantage. If Italian style is the first feature of characterization of these products, it occurs that the Italian sounding foreign companies would like to be Italian at all, because of the higher quality of our products. For this reason, Italian Institutions, business organizations, consortia and companies should focus their marketing and communication efforts in explaining what being an Italian product means, also when it means production inflexibility and higher production costs. Eataly's experience indicates that a relevant market segment exists all over the world, keen to know and better-understand our excellences and our products and to pay a premium-price, if the quality told in Italian production occurs effectively in the products. Furthermore, according to M. Bruni, this concept can be strengthened by the example that has presented before. If we consider the “Parmigiano Reggiano”, it is not commonly known that the product specification is a very strict and long process. “The milk must come from consecutive milkings and be collected within 2 hours of the first milking”. It cannot be subjected to centrifugation. The boilers have to be used only once a day. These are just three of the key-points of the successful processes in order to produce our “Parmigiano”, and they make clear implications: a product fully made in Italy, high quality of production due to many sacrifices and higher costs. The result is a unique product, that, thanks to Italian Sounding, does not find as many consumption and valorisation opportunities as it deserves. For this reason, the focus should concern to take advantage of the notoriety brought by Italian Sounding, for example, through increasing the prices on the basis of the higher quality offered, rather than the fake-products, and through a wisely placement and marketing strategy. Furthermore, Italy needs to implement other and more actions in order to explain the real differences between our P.D.O. and the foreign imitations: this has to be made towards the right targeting segment, both of consumers, both of professional operators. Additionally, at European level, Italy should improve its political action in order to make the agro-food traceability clearer and easier, in such a way that consumers would be provided of information that specify if a product made in Italy is a fake with a recognition of the whole supply chain. Then, this is the reason why Italy should start also multilateral agreements, both in E.U, both internationally, related to a mutual recognition of the designations that we have spoken about in the previous chapter. Finally, Italian greatest opportunity, according O. Farinetti, is properly to be Italian. These strategies of placement, marketing communication should be based on our desire to be well known over the world for our products ‘quality. Its suggestion was to bring together each of our P.D.O, P.G.I and T.S.G under a unique “pennant”, to make famous Italian people ambassadors of this pennant all over the world in order to make the consumer aware about the whole agro-food Product.

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42 Professor of Strategic and Entrepreneurial Management in Bocconi University.
43 Eataly is the largest Italian marketplace in the world, comprising a variety of restaurants, food and beverage counters, bakery, retail items, and a cooking school. Eataly was founded by Oscar Farinetti, an entrepreneur, formerly involved in the consumer electronics business, and collaborates with Slow Food.
Portfolio made in Italy. Consumers have to perceive that a product made in Italy occurs when lifelong eating patterns and tastes are being formed.

- **The T (Threats):** The threats explained in this paragraph only refer to companies that use Italian Sounding. In facts, the first threat for Italian agro-food system is the possibility for Italian Sounding companies to place themselves, with their low-quality and low-price products in market segments less “pioneering”, with the consequence of the downfall of our COI and annoyance and delusion perceived by consumers. This means that Italian Sounding products could be placed in markets that generally appreciate our Country of Image, take advantages of their starting placement not deserved, and then be the source of mistrust and misleading towards Made in Italy. Certainly, the diffusion of Italian sounding products produces a damage also to authentic products: the low quality of the imitations could discourage consumers from buying the authentic products, or, according to “Price-Discriminations” rules, it could cause a minor “reserve price”, with a downward effect on the authentic product price. Effectively, this hypothesis we are making, could find its reason in the “Market for Lemons”\(^4\). From another point of view, in conditions of a “trained” market, consumer is more capable to distinguish the authentic from the fake, even if, nowadays, there are still problems in that kind of market segments.

\(^4\) The Market for Lemons is a paper by the economist George Akerlof (1970) that examines how the quality of goods traded in a market can degrade in the presence of information asymmetry between buyers and sellers, leaving only “lemons” behind. A “lemon” is an American slang term for a car that is found to be defective only after it has been bought. The comparison has been made because the threat in this context is the increasing amount of Italian fake products that cannot satisfy the consumer to the point of the interruption in consuming Italian authentic products, too.
The Swot Analysis below has been made up using the concepts before explained, considering:

- Vertically, actual strengths and weaknesses of Italian agro-food system.

- Horizontally, the opportunities and threats Italy could find, in the context of international agro-market where Italian Sounding is the most important CSB strategy, both in economic, both in social terms, to fight against.
Highlights Considerations

As emerged clearly in these chapters, in the agro-food context, the dimensions of Italian sounding are relevant, both in actual export flows, both in the consequences for the national production system.

However, this phenomenon suggests the existence of a great trading opportunity for Italian agro-food system that has not been seized yet. Certainly, it is true that the inadequacy of regulatory, institutional framework, both national both European, makes authentic made in Italy protection difficult, and for this reason it punishes firstly our Country, then it punishes the consumers in the resto of the world. Nevertheless, it is also true that Italian agro-food system is characterised by the incapability (often due to their small and medium-size) of our companies to seize these opportunities and to operate on foreign markets with determination, effectiveness and then success. This priority should be taken into account by both the institutions, both the companies and stakeholders: in order to win the battle against Italian sounding, Italian companies need to become increasingly capable to success through authentic Made in Italy. According to this concept, it seems necessary to develop a clear, shared and strong action, in synergy with public institution and enterprises ‘system. The aim is to strengthen not only our brands and products reputation, but also the organic, organized and constant presence of Italian companies on the pioneering markets, where the place employed by Italian sounding products is high, such as North America. It means that, up to now, Italy has been focusing its effort on a market segment so much smaller than the potential one. Its penetration and achievement could boost not only the agro-food system, but also whole the Italian economy. The achievement of this aim could be possible only trough educating foreign consumers at eating healthy, safe and taste food, such as Made in Italy food.

In conclusion, I would like to mention a part of the speech by Oscar Farinetti during a discussion where Giuseppe Liberatore\textsuperscript{45}, Mario Cichetti\textsuperscript{46}, Antonio Lucisano\textsuperscript{47} and many other Italian producers participated:

“If American people find in a supermarket the famous green jar of ‘Parmesan’ with few cents, why should them pay three or four times more for the ‘Parmigiano Reggiano’ made in Italy? Because our product is taster and healthier, and for this reason it has a premium-price. However, if we do not make sure that American people try to taste our product, also comparing the authentic with the fake one and explaining where our product comes from, it is no wonder they will buy the green jar”.

This is the key: Education at Good taste, promotion and innovation. “American people, such as the rest of the world, create understanding over differences, and they are ready to overpay for food, if it is tasty and good, much more than us”.

\textsuperscript{45} President of AICIG – “Associazione Italiana Consorzi Indicazione Geografica”.
\textsuperscript{46} Director of Consortium “Prosciutto San Daniele”.
\textsuperscript{47} Director of Consortium “Mozzarella di Bufala”.
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