Literature review WP 2

Italy

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Review report

1. MAIN FINDINGS AND POLICY IMPLICATION

The main goal of this review report is to analyse the main findings of the sector of PDO Italian salami that cam be considered one of the more important PDO production in Italy. Studies on the organisation of production chains of Italian typical products have not been numerous in the past, even though important, owing to a variety of reasons, including the widespread opinion that this segment of the food chain was marked by a scarce specificity and the lack of interpretation tools for the phenomena observed without taking into consideration the objective difficulty in knowing the organisation aspects of the single Consortia or of the governing bodies of the chain.

In the case of many typical salami, one must confine himself to observing the changes occurred to structural phenomena in the course of time, the number of companies involved, their productive capacity and the amount of processed products. The analysis of these elements will necessarily lead to an interpretation of ongoing phenomena and of the organisation and the co-ordination taking place along the production line observed.

It must not be forgotten that, also in the case of important production chain, such as the Parma ham, the company size is often limited and the data on the chain itself and on the specific sector are often hard to collect. It must be added that many Consortia for the protection of a specific product were created only recently giving rise in turn to a real co-ordination activity of the chain production. Furthermore, studies on the chain production organisation of typical salami are few and often published in minor review which may be neglected by researchers. All this implies that the number of articles concerning the organisation of typical salami chain production is rather modest. It was not until recently that ISMEA and Nomisma have carried out specific studies on meat products and on PDO typical products respectively. The following description is a concise summary of an analysis made on the typical salami sector as it emerges from the framework of wider studies carried out by ISMEA and Nomisma and from other specific research.

2. ABSTRACTS

Arfini, F.; Mora, C. (1998)
Typical products and local development: the case of Parma area.
52. EAAE Seminar, Parma, 1997/06/19-21, EAAE, European Association of Agricultural Economists, La Haye, In : Arfini, F. (ed), Mora, C. (ed.), Typical and traditional products : rural effect and agro-industrial problems, pp 11-40.
The paper check the presence of reciprocal synergies between typical and traditional products and local development in province of Parma, where the presence and intensification of relations between the primary and secondary sector were, in the first fifty years of the century, the deciding factors of the economic development.
In the case of Parma Ham the paper shows very clearly as, in the past, was very strictly relationship betwen the production of Parmigiano Reggiano Cheese and Parma ham. Nowdays the Parma ham area can be considered an economic district where it is possible observe a range of "diagonal" relations relative to the development of services for seasoning industry, such as mechanic industries specialised in the building of equipment and machineries for pork-meat industries, firms that provide industrial refrigerating units, seasoning plants, carrying trade firms. Then, there is a flourishing of other activities, still characterised by the fact that they provide various services: building enterprises, firms related to the building and maintenance of electric and hydraulic plants, and also offices of qualified accountants and business consultants.
The formation and the development of all these relations among small industries can be considered very important for the survival of the district, because they provide, with a peculiar adaptability, specific and efficient services for the establishments of the seasoning industry. In this way, finding on the local market services necessary to production, seasoning industry hasn't been "obliged" to overload the corporate structure, by providing by itself for what , instead, was offered by the local market. As a matter of fact, facing this alternative, firms opted for buying instead of making.
Besides this kind of "diagonal" relations there is also a wide range of "lateral" relations among firms, due to the presence, in a limited area, of industries that produce the same products using similar methods. Relations of this category of industries are essentially based on keen competition which grants a continuous effort to maintain sufficiently fair the prices of the exchanges among different dealers.
Through the use of external economies there has been the creation on the territory of those necessary conditions for the survival of small industries. Such economies, which are outside the industry but inside the district, are given also by the possibility of acceding, quite easily and with informal negotiations, to services that are particularly aimed at their necessities. This has been in the past, and in some ways is still today, the deciding factor of the birth and development of seasoning industries. All this has been realised thanks to the phenomenon defined as "widespread entrepreneurship/enterprise",

according to which once there has been the creation of favourable circumstances for private enterprise, this takes shape by exploiting every opportunity offered by the development of the leading industry.

"Self employment" has become an attainable goal, thanks to various initiatives which take shape by working and offering services to numerous industries on the territory. Private initiative, in a dynamic environment such as the one of the district during the last thirty years, has found a propitious ground for its development. Ham market lived a continuous development and, in case of business failure, the prospects of employment were such as to make less traumatic the reinstatement in the production system: even if the initiative hadn't been successsful, opportunities of wage-and salary work wouldn't have been lacking.

The achievement of the external economies examined above comes from the formation, inside the district, of what is defined as "community market". Economic relations among firms are characterised, on one hand, by a keen competition which urges them to find the best productive solutions, on the other by co-operation and mutual confidence. In fact, institutions as the Consortium still play an important role in order to preserve the "sensation of membership", which is a necessary element for the growth of the district, even if this "sensation of membership" has deep social and cultural roots that are the basis of the communities in which every actor of the district takes part.

Esposito, F.M. (1997)

Antitrust commission vs. Consorzi di tutela: an economic evaluation

52. EAAE Seminar, Parma, 1997/06/19-21, EAAE, European Association of Agricultural Economists, La Haye, In : Arfini, F. (ed), Mora, C. (ed.), Typical and traditional products : rural effect and agro-industrial problems, pp 143-160.

The Paper focus on the rule of the Italian Antitrust Commission that in 1996 charged Prosciutto di Parma, Prosciutto di San Daniele, Parmigiano Reggiano and Grana Padano Consortia of restricting competition among their members through quotas. This problem is particular relevant because from these aspect depend the organisation of the production and the market efficiency. The Author shows as charges was substantially right on a legal ground in her decision against the Parma Ham Consortia, and that exemption of ham producers can be justified by economic reasoning. The Author also argued that quotas can help to maintain quality standards, but only if there is a way to ensure quick and sure punishment of cheaters, and if they are set to optimal production levels of high-quality producers - in this way, quotas avoid output expansion by cheaters. Moreover vertical chain control problems prevent any system of quotas from ensuring quality of final product, which is what consumers care for. This weakens any argument favorable to quotas, but it emphasizes the potential benefits of vertical integration. Finally, under incomplete markets and incorrect forecasts, Consortia may use quotas to lead producers to more efficient equilibria.

Implications for Consortia activity are then clear: first, they should take on the task to produce and update reliable forecasts of demand and output, and promote any initiative useful to help members to make correct output decisions. This is particularly important, since most firms are small sized and unable to do it by themselves. In other words, they should try to behave like a "benevolent central planner". In the long-run, Consortia should promote formal future markets for hams. Second, they should promote vertical integration, in order to get better control of quality. In particular, vertical integration in ripening might be favored by creating a Credit Consortium, in order to lower financial costs producers have to bear to ripen wheels in their own facilities.

Rosa, F. (2000)

Total quality management of the PDO Prosciutto San Daniele

67. EAAE Seminar, Le Mans, 1999/10/28-30, EAAE, European Association of Agricultural Economists, La Haye, In : Sylvander, B. (éd.); Barjolle, D. (éd.); Arfini, F. (éd.), The socio-economics of origin labelled products in agri-food supply chains : spatial, institutional and coordination aspects, 408 p, Actes et Communications, N° 17-2, Paris, INRA-Editions, 2000/11, 2. vol., pp 35-49.

The Authors erase some question related to the organisation of the chain of San Daniele Ham approach and in particular he ask if the perception of quality of a typical product has changed. More precisely : is this still influenced by attributes like the tradition, artisan style of preparation and presentation, perception of cultural and historical values that are intrinsic to territorial or geographic specificity? This question was posed to study the case of San Daniele ham using the integrated supply chain management approach.

In the paper the supply chain management approach was used to introduce the Total Quality Management as a technical method to improve the standards of typical production. The chain approach allowed to predict the final quality as determined by three groups of functions to be coordinated by the management organization of Consorzio San Daniele: physical functions combined with market functions and the facilitating functions that at various level were responsible of the technical and economic performance of the chain and reduced the risks of market failure.

The three groups of functions were supposed to be controlled at the three levels of the chain: procurement, processing, seasoning, and to simulate the chain model in an optimizing process using the feedback control mechanism to adjust the variables and simulating the functions according with a scheme of production that was elaborated in respect of the tradition production. This technological approach to typical production, was assumed to represent an advance toward the standardization of typical quality, it could generate better market transparency to facilitate the consumer discovery for quality of typical products. The conclusions were that with the integrated supply chain management it was possible to ameliorate the standard for quality and conservation of this typical food product without loosing the specific features that make the product typical. This was appreciated by the consumer that demonstrated to be interested in market transparency even if emotional preferences are playing substantial role in buying this type of product.

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Addonizio Antonella	Il prezzo della qualità del Parmigiano Reggiano in provincia di Reggio Emilia.	93-94
Alfonsi Valerio	Dinamica e specializzazione dell'industria agro-alimentare in Emilia Romagna.	96-97
Alibani Laura	La valorizzazione del fattore tempo nell'analisi dei consumi alimentari	98-99
Ambroggi Daniele	Modelli di consumo alimentare: tendenze recenti e realtà locale	99-00
Antozzi Federica	Qualità e certificazione per i prodotti tipici:Problemi e speranze.Il caso del Parmigiano reggiano.	96-97
Aroldi Sara	La filiera della qualità del Parmigiano-Reggiano tra innovazione e tradizione	98-99
Arzani Silvia	Grana Padano :un confronto tra sistemi privati e cooperativi di produzione.	96-97
Azzolini Sonia	Aspetti economici e produttivi dell'aceto balsamico tradizionale di Reggio Emilia	98-99
Bacci Fabio	La differenziazione nei prodotti tipici : il parmigiano reggiano delle vacche rosse.	96-97
Battistotti Virginia	Valorizzazione dei prodotti tipici nell'agriturismo piacentino	95-96
Beltrami Gianmarco	Problemi e prospettive della filiera del pomodoro da industria	93-94
Bengiat Alon	Le strategie per l'esportazione dei prodotti tipici: il caso parmigiano-Reggiano	99-00
Bertella Giovanni	Effetti dell'introduzione delle quote latte nelle aree di montagna;un'applicazione empirica.	96-97
Bertozzi Barbara	Struttura economica e prospettive delle imprese lattiero-casearie	99-00
Bertozzi Giuliano	Valutazione di un sistema qualità certificato per la produzione del Parmigiano Reggiano.	96-97
Bocchi Priamo	Aspetti e problematiche dell'esportazione di Parmigiano-Reggiano	94-95
Bonatti Sabrina	Il futuro del settore lattiero-caseario italiano: il caso del Grano Padano.	94-95
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Cappa Davide	L'evoluzione degli scambi agroalimentari tra politiche e strategie	99-00
Caramaschi Andrea	La valorizzazione delle produzioni locali :il consorzio "terra di virgiliio".	96-97
Cerretti Raffaella	Effetti dell'applicazione della regolamentazione comunitaria sui prodotti tipici a "denominzaione di origine protetta": il caso	98-99
Chiesa Enrica	L'economia del grana padano in provincia di Piacenza attraverso l'analisi di bilancio dei caseifici cooperativi	96-97
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Compiani Mauro	I contratti di integrazione verticale nel sistema agroalimentare	91-92
Curatolo Roberto	Prospettive per la commercializzazione dell'olio d'oliva siciliano: il marchio D.O.P. "Valli Trapanesi"	98-92

Dall'agnola Mirko	Effetti e problematiche conseguenti alla globalizzazione del mercato del vino.	98-99
Dall'asta Paolo	L'industria salumiera in provincia di Parma: un tentativo di analisi delle relazioni con la produzione suinicola	89-90
Danielli Claudia	I rapporti intersettoriali nella filiera agroalimentare: il caso avicolo mangimistico	92-93
Esposito Paolo	Il commodity futures nell'agro-alimentare e possibilità di applicazione nella commercializzazione del Parmigiano Reggiano.	99-00
Fabbi Giuseppe	Analisi della filiera del Parmigiano-Reggiano mediante le tavole input-output	97-98
Frigè Michele	Aspetti economici e giuridici degli scambi internazionali dei prodotti ortofrutticoli.	93-94
Galli Laura	L'asimmetria informativa nel sistema agro-alimentare e i suoi riflessi sul produttore agricolo.	98-99
Greco Mauro	Effetti delle biotecnologie nel settore agro-industriale	99-00
Grigolini Andrea	I contratti di integrazione verticale: nel settore zootecnico:un caso aziendale	92-93
Guareschi Lucia	Produzione e commercializzazione del parmigiano reggiano in provincia di Parma	91-92
Inverardi Marco	L'aceto balsamico: strategie di marketing e percezione del prodotto da parte del consumatore	98-99
Jacono Annalisa	Il ruolo delle produzioni tipiche nelle aziende multinazionali del settore agro-alimentare:il caso Negroni.	96-97
Kuhn Paolo	Agricoltura sostenibile e produzioni "biologiche".	98-99
Lori Lara	Il commercio equo e solidale dei prodotti agroalimentari	99-00
Lusuardi Paolo	L'azienda lattiera nel comprensorio del formaggio parmigiano-reggiano : una comparazione fra zone favorite e svantaggiate	90-91
Mangialardi Andrea	I problemi distributivi del Parmigiano Reggiano	99-00
Martelli Fabio	Le organizzazioni professionali ed economiche degli agricoltori in provincia di Mantova	92-93
Menozzi Giovanni	Il sistema agroalimentare: stato dell'arte e analisi delle TEI 1978-1985-1988	90-91
Mongelli Angela	Le Associazioni dei Produttori agricoli in provincia di Trento.	93-94
Monica Francesca	Caratteri evolutivi dello sviluppo rurale dell'appennino parmense	98-99
Monti Antonio	Strategie produttive e commerciali delle imprese appartenenti al consorzio del prosciutto di Parma.	93-94
Mora Susanna	La distribuzione delle produzioni biologiche in Italia	99-00
Mori Simona	Il distretto agroalimentare	92-93
Parenti Raul	La regolamentazione europea dei prodotti agroalimentari tipici e relativa attuazione.	95-96
Pedretti Massimo	L'export del prosciutto crudo di Parma	96-97
Peschiera Nicola	Caratteristiche della filiera del suino nel mantovano: il settore della produzione	90-91
Pezzuto Luigi	Gli aspetti economici nella certificazione di processo:il caso dell'olio d'oliva.	99-00
Raglio Stefano	La politica della qualità per i prodotti agroalimentari: aspetti	91-92
Rastelli Simone	La filiera del parmigiano-reggian: aspetti tecnologici, normativi, commerciali ed economici	99-00
Redeghieri Andrea	Il mercato dei salumi in Italia	88-89
Rinaldi Rossana	Un impresa lattiero casearia nell'evoluzione del sistema agro-alimentare: Giglio SpA	94-95
Rosa Annalisa	Adeguamento alle normative igienico-sanitarie e rintracciabilità nelle aziende della filiera carne bovina	99-00
Rossi M.Paola	La filiera della carne bovina: nuove strategie di sviluppo	88-89
Sanguanini Franca	La cooperazione nel settore lattiero-caseario mantovano: situazione ed analisi di casi aziendali	98-99
Sassi Giuseppina	La politica di marca nel settore della carne suina fresca	99-00
Seidenari Alessandro	Aspetti congiunturali e strutturali del mercato del Parmigiano-Reggiano in provincia di Parma	98-99
Trombi Laura	La qualità come fattore strategico nella produzione del parmigiano reggiano	90-91
Villa Marco	Cooperazione e integrazione in un moderno sistema agro-alimentare	88-89
Zanichelli Elisa	I rapporti di filiera nel settore del Parmigiano-Reggiano	98-99

Discussion report

1. INTRODUCTION

This discussion report will focus on the PDO salami sector with the objective to analyse more deeply some aspect of this PDO chain for four typical PDO salami in Italy and the more relevant issue that at the moment characterising this sector.

2. THE SECTOR OF TYPICAL SALAMI

Data concerning the typical salami sector show how Italy is characterised by a marked propensity to pork consumption which explains the considerable number of pig breeding plants scattered all over the territory, above all in Northern regions, where most salami producing factories at a national level with their products derived from local traditions are located. 80% of salami production is actually located in four region of Northern Italy, more specifically in the following regions: Emilia-Romagna, Veneto, Piedmont and Lombardy. Southern regions, instead, contribute to national production up to approximately 5%. This peculiar productive concentration is partially due to the presence of significant quantities of products labelled with the Community trade marks PDO and PGI, which is an indicator of the special link existing with the territory where national salami production takes place.

The competitiveness of the Italian salami market is therefore based on production differentiation, focusing its attention on the typical aspects of local traditional productions. The productions of typical salami labelled with the Community trade marks PDO and PGI are about twenty, mainly located in Northern Italy where the salami industry has ancient origins. Table 1 shows an overview of protected typical productions in Italy.

Table 1. : Regional localisation of PDO/PGI salami

Emilia Romagna	**9**	**Tuscany**	**2**	**Veneto**	**4**
Parma ham	PDO	Tuscan ham	PDO	Veneto Berico-Euganeo ham	PDO
Modena ham	PDO	Mortadella from Bologna	PGI	Mortadella from Bologna	PGI
Culatello from Zibello	PDO			Cotechino from Modena	PGI
Coppa from Piacenza	PDO	**Trentino Alto Adige**	**2**	Zampone from Modena	PGI
Pancetta from Piacenza	PDO	Speck ham from Alto Adige	PGI		
Salami from Piacenza	PDO	Mortadella from Bologna	PGI	**Piedmont**	**1**
Mortadella from Bologna	PGI			Mortadella from Bologna	PGI
Cotechino from Modena	PGI	**Umbria**	**1**		
Zampone from Modena	PGI	Norcia ham	IPGI	**Friuli Venezia Giulia**	**1**
				San Daniele ham	PDO
Lombardy	**5**	**Val d'Aosta**	**2**		
Salami from Varzì	PDO	Jambon de Bosses	PDO	**Calabria**	**3**
Salami from Brianza	PDO	Anard lard	PDO	Sausage from Calabria	PDO
Mortadella from Bologna	PGI			Capocollo from Calabria	PDO
Cotechino from Modena	PGI	**Marche**	**2**	Pancetta from Calabria	PDO
Zampone from Modena	PGI	Carpegna ham	PDO		
		Mortadella from Bologna	PGI	**Lazio**	**1**
				Mortadella from Bologna	PGI

Source: Nomisma on Mipaf data

The region showing the greatest vocation for typical salami productions is Emilia Romagna with 9 PDO products, without considering all other productions pending the Community acknowledgement (the salami from Felino and the coppa from Parma for example). Some of these productions are localised within well defined areas, such as the Parma ham and the culatello from Zibello, while other products are distributed on a vast territory including various regions as in the case of the mortadella from Bologna which is produced in 8 regions. In this sense, one could doubt the real "typicity" of some salami because the link between product and territory is severed; in other words, the distinctive marks of a tradition relating to a specific culture (rural world) of pork processing cease to exist. Stating that the mortadella Bologna reproduces the same salami traditions as other regions or areas, such as Upper Adige or Lazio actually means going beyond the geographical dimensions of that specific product. However, if productive localisation and processing aspects become an integral part of the typicity content of a product in an innovative way, it is possible to expand this characteristic, and thus justify it, to many salami which have lost their original geographic contours owing to the market logic.

3. THE TERRITORY OF ORIGIN

It is still fundamental, however, to know more about the link between typical products and the local economic context. With this regard, for the salami sector, Emilia Romagna and more specifically the Parma surrounding area certainly stand for one of the most representative realities in the organisation of typical salami production lines.

According to the information provided by the Parma Association of Industrialists, the sector of animal preserves and slaughtering in the area surrounding Parma according to 1998 data has a turnover of 2,300 billion Lire and employs around 3,900 people distributed in about 565 companies with small size companies (less than ten employees) prevailing over others. 80% of the total number of companies working in the meat processing industry actually belongs to this category; the latter employs 37% of the sector's work-force. Besides the considerable number of companies with less than ten workers, there are 113 companies, which make up only 20% of the total, but employing 63% of workers. This alone shows the presence in the sector of two well defined entrepreneurial models: one where the non industrial character of the productive activity prevails and the other where the enterprise is often structured in the form of a corporate company. For the last kind of company, it is interesting to underline that ownership is almost always in the hands of individual families with a very old entrepreneurial past behind them. This shows how rooted the meat industry is in the local economy.

The number of salami processing plants in the area surrounding Parma can be estimated around 250 units of which 201 devote themselves to ham production. In the year 2000 the number of hams produced added up to 16 million pieces of which 9 millions bearing the mark "Parma ham". The special vocation of the Parma area for ham production, in terms of specialised labour and service supplying companies to processing industries has contributed to the setting up of a number of ham processing plants to the extent that at present the Parma district covers more than 50% of ham demand at a national level.

Notwithstanding this, there is a great fragmentation of the typical salami production sector in Parma, thus confirming the non industrial character of many companies working in this field. In particular, data referring to the average company production of about 400 tons are to be considered as a low level if compared to the San Daniele ham processing plants producing an average of 50% more than those based in Parma. As far as other salami are concerned, the presence on the territory is more limited with a total of 62 active companies, assuming that none of those taken into consideration produces more than one sort of salami shown in the table. Data regarding the average size of the culatello from Zibello producing companies are sufficient to state that this niche product is originated in non industrial laboratories of small and very small dimensions. The productive structures of the two remaining salami: the salami from Felino and the coppa from Parma indicate a limited dimension. For these last two it must be considered, however, that in most producing companies they are associated with other salami productions, despite their role as main reference.

The salami industry in Parma gave birth to a system based on a territorial integration network with all operators of the meat sector, so as to allow the development of efficiency enhancing synergies and hence of competitiveness of all the sector.

In fact, the active role of the local economy is not confined to a mere industrial processing phase but affects all those sectors supporting the entrepreneurial activity: form raw materials procurement to relationships with slaughter-houses which, in turn, activate a very important agricultural system based on breeding and on all operators connected with it (animal fodder plants). Subsequently, there is the phase of industrial processing, with a series of operators specialised in services who have developed for some time, with seasoning and maturing, bone-removing and packaging plants. Furthermore, the concentration of productive units in a limited area has contributed to the growth of companies specialised in the construction and supply of meat processing plants and some of them have taken on a leading role in their market. Also credit has become a protagonist in the meat processing activity; new and specific financial products have been developed for salami producing industries and tourism has benefited as well from the constant growth and strengthening of food tasting.

4. THE STRATEGY OF THE FACTORIES IN PARMA REGION

Relations between industries participating in the Parma salami producing industry system are animated by a strong competition, moving all operators towards increasingly more efficient solutions based at the same time on co-operative ideas and on principles of mutual confidence, determined by a deeply rooted sense of belonging to the territory. These elements are the basis of a success witnessed by the high rate of economic activation right in the salami sector involving all other production lines. With this regard, the development of the meat processing industry in the Parma surrounding area has certainly contributed to the phenomenon of people staying on to live in their home villages in foothill areas, thus avoiding the mass exodus which instead has marked many Italian regions.

Despite this success story, there are however a few elements that must be considered because they may eventually increasingly affect the pork processing sector in the near future.

Among these: security and traceability issues, quality in general, innovation and relationships between productive activities and the environment.

The Parma ham, in particular, thanks to a careful protection and quality control policy adopted in the course of time by the Consortium, by producing industries and also thanks to a control activity carried out by IPQ, enjoys a relatively positive situation: the complex control system already in force allows an "almost-traceability" of the product as well as a good control of the PDO production quality level (minimum).

The not easy evaluation of needs phase remains to be managed in order to make traceability effective in the forthcoming years. In this role, the Consortium will be able to play a decisive role together with entrepreneurs and the bodies involved. The need to develop a complete traceability of the product will probably be "imposed" by the market as a matter of fact in the forthcoming years, even though it not deeply felt yet. The advantage of PDO productions (Parma ham and culatello from Zibello) on this particular aspect for the control system already in force cannot be extended to other salami productions in Parma which have not obtained a similar acknowledgement and which have not gathered yet to face all this.

The innovation and the territorial link are somehow connected: on the one hand innovation cannot certainly move toward all directions for productions which were granted PDO status considering the limitations imposed by disciplinary bodies; on the other hand innovation can however affect aspects that from a business and organisation point of view can be just as meaningful (suffice to think of the role of packaged sliced salami in a modified atmosphere for the foreign market).

Innovation, furthermore, especially with reference to the Parma ham, is the real leading product of the salami sector and is bound to move toward a greater product specificity originating from a special link with the territory of origin. If these innovations went in the opposite direction, they would jeopardise a production which would be less and less typical and thus different from competitors. The peculiar link of PDO productions with the territory and the increased concern on the part of consumers at an international level for the environmental impact of production request a special attention to the management of relationships between the environment and the productive activity in the awareness that there may be negative and positive impacts in both directions.

In this complex evolution process, a decisive role can be played by the protection Consortium, in particular by the Parma ham Consortium, but it must imply the simultaneous participation of all subjects interacting in this complex territory system.

Among opportunities and difficulties affecting the typical salami industry, those connected with the particular productive structure must be underlined: also in the case of the most important product, in fact, many companies are of a much too small size to be able to make a difference in a market where they are to face increasingly stronger subjects with a greater negotiating power.

The issue of marketing, therefore, is very much felt by this great number of producers. The role of the protection Consortium is vital for strengthening the collective image of a product, but it cannot be sufficient to keep and strengthen the business position of many entrepreneurs. Therefore, finding appropriate development strategies allowing the proper identification of strategic marketing variables for each company is extremely important, but as much requests good analysis and business management abilities.

5. NEED FOR NEW RESEARCH AND POLICY IMPLICATION

According to the bibliographies referred to, the main need for new research is that of understanding the co-ordination mechanisms of typical salami productions in the light of the new role taken on by protection Consortia in Italy, of the increasingly greater importance attributed to quality and the need for innovation of the product to be more competitive on the market. The analysis instruments used so far have not always been satisfactory in that they do not cast a full light on how the decision making process takes place with regard to the above mentioned issues.

The analysis of structures, of the productive capacity and of the development of demand does not explain in a sufficient manner the market efficiency level and the possible transition costs between the various participants, but above all it does not explain the strategies adopted in coping with the problems that typical salami chain production are now facing. The "collective" management of issues, such as quality and traceability do not just have an impact on the European market, but also on third countries and South America markets. With this regard, it is important to understand the negotiating position of the European Union in the framework of the WTO agreements as the future co-ordination modalities of the sector and the subsequent market strategies also depend on this.