

AGRICOMPET BULLETIN ON RESEARCH PROGRESS (AB-RP)

WP2 – THE MAIN ITALIAN GIs FOR WINE, CHEESE, AND PROCESSED MEAT: CASES SELECTION

Purpose: The cross-country analysis of successful Geographical Indications (GIs) is a crucial part of AGRICOMPET's work package two (WP2). Notably, the first action is to systematise the main organisational characteristics of GIs and their governing bodies, as well as the key performance factors to measure their success –at the individual (business) and collective levels.

Design & methodology: First, each partner country identifies suitable GI cases based on two common indicators: *sales volume* (i.e. the certified production volume) and *price premium* (i.e. average price per kg/l at farm level). Subsequently, the Top10 are selected based on their average price and grouped into 4 clusters split by their position relative to the median values:

		Sales Volume	
		Low	High
Price Premium	High	CLUSTER 3	CLUSTER 1
	Low	CLUSTER 4	CLUSTER 2

- **Cluster 1:** large-scale GI productions obtaining a high price-premium from the market;
- **Cluster 2:** quantity-oriented GIs whose products are sold at more competitive prices;
- **Cluster 3:** niche GIs characterised by smaller volumes but higher market prices;
- **Cluster 4:** small GIs having a lower value than others operating in the same sector, potentially representing emerging and lesser-known GIs.

In Italy, GI districts located in northern regions (e.g., Veneto, Emilia-Romagna, Lombardy, Piedmont account for 65% of the national GI market (Rosati & Del Bravo, 2019). Therefore, the analysis of Italian GIs focuses on northern Protected Designation of Origin (PDO; DOP in Italian) products based on 2019 ISMEA data on average prices at origin (i.e., at the farm level) and certified volumes. Missing average prices are obtained from the relevant chamber of commerce or computed from production and quantity data.

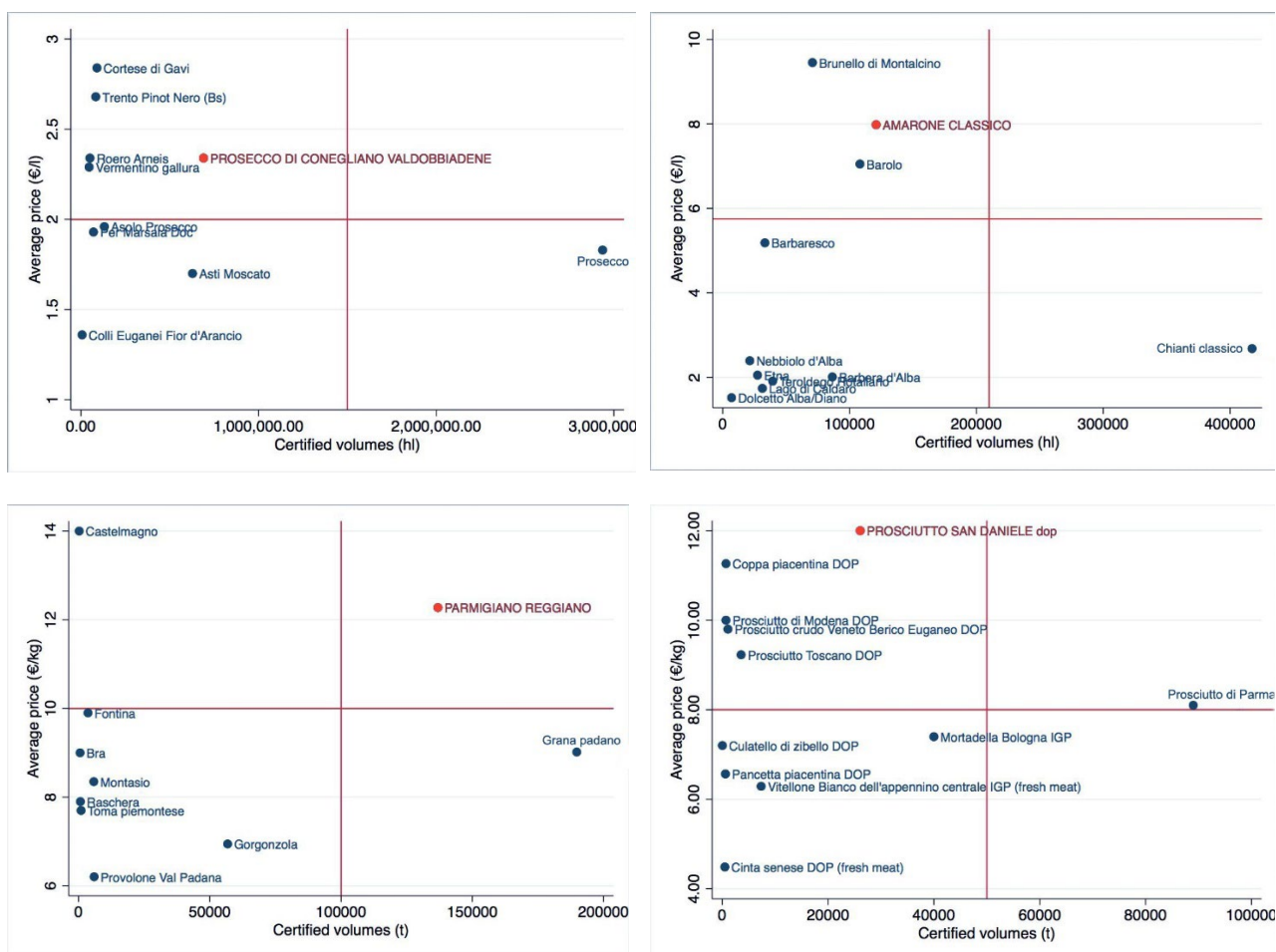
Findings: Figure 1 presents the results for the selected GI sectors, differentiating white/sparkling wines, red wines, cheese, and meat products with red lines indicating the median values.

Noteworthy sparkling wine GIs are Veneto's Prosecco DOC (2,936,540 hl certified in 2019), a quantity-oriented GI belonging to cluster 2, and Conegliano Valdobbiadene Prosecco Superiore DOCG, in cluster 3 (690,648 hl certified in 2019, average prices around 2.3 €/l). Trento DOC (Trentino Alto Adige) and Roero Arneis DOCG (Piedmont) are other two. Less famous GIs like Fior d'Arancio DOCG and Asolo Prosecco DOCG fall both in cluster 4.

Regarding red wines, Amarone Classico DOCG (Veneto), Brunello di Montalcino DOCG (Tuscany) and Barolo DOCG (Piedmont) are categorised as high-end niches (cluster 3). At the same time, Chianti DOCG (Tuscany) shows similar performance as Prosecco DOC, falling into cluster 2.

Parmigiano Reggiano DOP stands out among Italian GI cheeses (cluster 1): it managed to expand its production (144737.98 tons certified in 2019) while maintaining a remarkable average price (12.3 €/kg). Its competitor, Grana Padano DOP, belongs to cluster 2, albeit with a great value (9.0 €/kg). Finally, Castelmagno DOP (cluster 3) benefits from the highest average prices (+1.7 €/kg premium vs Parmigiano and +5.0 €/kg vs Grana) with modest production volumes.

Figure 2 Results of Italian GI cases analysis



Note: top-left graph: white and sparkling wine; top-right graph: red wine; bottom-left graph: cheese; bottom-right graph: meat products. Selected GI cases are reported in red.

A considerable share of meat GIs classifies as high-value niches (cluster 3). Prosciutto Crudo di San Daniele DOP is an interesting case, obtaining a hefty price premium (12 €/kg) with significant volumes. On the other hand, prosciutto di Parma DOP also shows a considerable production (almost 90,000 tons certified in 2019) while maintaining a borderline price between clusters 1 and 2 (8.1 €/kg).

Follow-up research: We will further analyse the selected cases (Prosecco Valdobbiadene, Amarone, Parmigiano Reggiano, and Prosciutto di San Daniele, highlighted in red) to explore their governance structure, the organisational, competitive, and regulatory challenges and their (potential) solutions.

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