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**Prospects of development of quality olive oil
for Italian farms: first indications in a case
of study on a *focus group***

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**Poster Paper prepared for presentation at the 105th EAAE Seminar 'International
Marketing and International Trade of Quality Food Products', Bologna, Italy,
March 8-10, 2007**

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Prospects of development of quality olive oil for Italian farms: first indications in a case of study on a *focus group*

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Summary

This analysis has examined the consumption of certified quality agricultural productions in the European and Italian markets; this short poster paper has observed, in particular, the perspectives of growth in some agricultural productive sectors, as for example the olive oil industry. In the second part of this research, it is showed the strategic importance of what quality represents for the consumers, as an element able to influence the consumers' choices for certified quality olive products. Having compared the results of a case of study carried out on a focus group, with the help of 50 interviewed people, with those obtained by other studies, they pointed out the critical states that certified quality food productions might have for the consumers, the market, and even the farms.

The results emerged in the present analysis have confirmed as the agro-industrial products Dop and organic are preferred from the interviewed subjects because able to guarantee the quality and the food healthiness, confirming the results showed in a precedent research about typical products and about the market capability to guarantee the food quality.

KEYWORDS: focus group, organic food, food quality, extra virgin olive oil.

1. Introduction

The Italian agricultural production has shown, in these last years, in comparison to the general agricultural production in the European union, a important growth, recovering some productive decreases, imputable to contingent variations, verified in 2003 (Figure 1); particularly, Italian agro-industrial enterprises have increased their productive ability to other European States (Figure 2).

The variable macroeconomic, according to the forecasts formulated by the European Committee, in the next years, seem to confirm a stability in the growth of the resident population, with considerable increases of Gross Domestic Product in the European Countries, even if 10 States members that have joined from 2004 to the European Union seem to show the best performances of increase (Table 1). All of this will have some very interesting consequences; in fact, an increase of income can be tied up to an increase of the food consumptions and, accordingly, to an increase of the exports from the Italian agro-industrial farms and enterprises. The macroeconomic forecasts, edited by the Committee agriculture of the European Union, in the agricultural sector, underline a reduction of annual growth for the next three years, connected, nevertheless, to a constant and slow growth of the general expansion, hauled by the new countries that belong to the European Union (Figure 3)

In European Union the comparisons carried out in different years about percentage variation of the assistant value in the primary sector seem to confirm an immobility in the last five-year period 2000-2004, in comparison to a very strong growth reported in the preceding five-year period 1995-1999; Spain, France and Germany have made to record significant rates of growth, even if very contained in comparison to those surveyed in the preceding period; however, Italy maintains, an interesting levels enough of growth even if in strong reduction in comparison to the preceding years (Graph 1).

The Italian agro-industrial sector in these last years has made to register a notable increase of his own export capability, even if agro-industrial deficit is elevated, more than six thousand million of Euro, in line with a tendency of growth pointed out in Europe (Ismea, 2006); nevertheless, the appreciation of the Euro on the dollar has not supported the exports and it has reduced the competitiveness of the Italian enterprises in comparison to other European competitors (Spain, Germany); Italian agricultural exports didn't diverge from European middle value (Figures 4-5).

Figure 1. Process of agricultural production in a middle period constant with value in Italy (-----) and in European Union (—) (Source: Ismea, 2005)

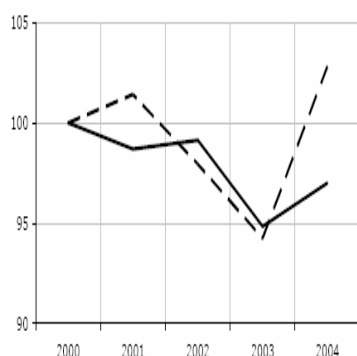


Figure 2. Seasonally adjusted index of manufacture production in Italy (-----) and in European Union (—) (Source: Ismea 2005)

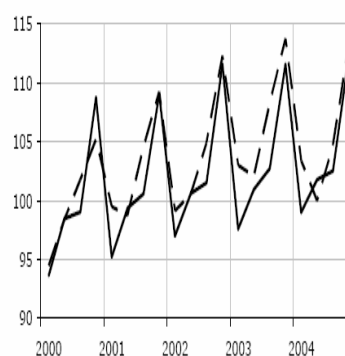


Table 1- Middle term outlook of some macroeconomic variable (Source: European Commission Directorate General for agriculture)

	2007	2008	2009	2010	2011
Population growth EU 25(%)	0.2	0.2	0.2	0.2	0.2
GDP Growth EU 25 (%)	2.5	2.5	2.5	2.5	2.5
GDP Growth EU 15 (%)	2.4	2.4	2.4	2.4	2.4
GDP Growth EU 10 (%)	4.3	4.3	4.3	4.3	4.3
Inflation EU 25 (%)	1.9	1.9	1.9	1.9	1.9

Figure 3. Outlook of growth evolution in the primary sector in a long term in European Union (Source: European Commission Directorate General for agriculture)

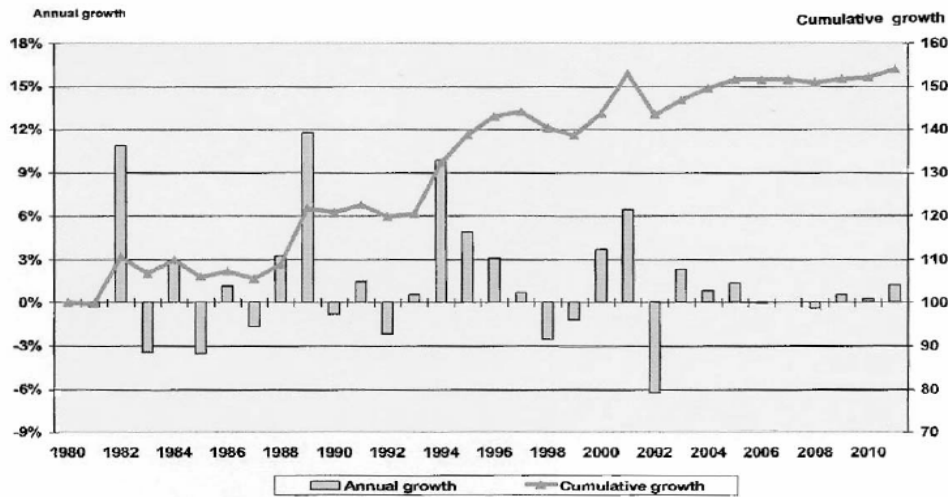


Figure 4. Main export countries of agricultural products in the World (Source: Ismea, 2006)

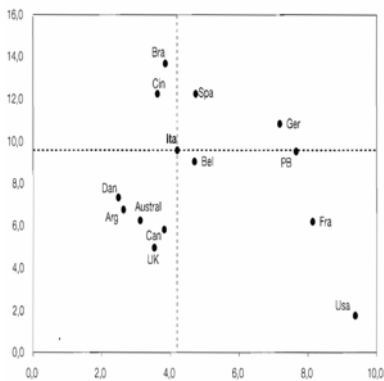


Figure 5. Food export quota in different countries of European Union (Source: Ismea, 2006)

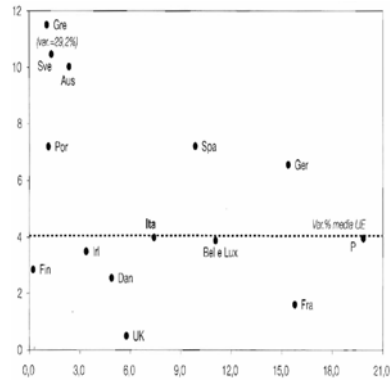


Table 2. Italian certified food export in current value (Source: Ismea, 2006)

	Export (million of €)	Variation % 2004-2003	Variation % 2004-2003	Annual average variation % 2000-2004
Food quality product Dop/Igp	1.282	6.6	5.8	3.9

2. Background

The modern consumer has a changed his attitude to the food sector; accordingly, agro-industrial sector have to be able to offer some certified quality products that can find a fit position on the market. The Italian agricultural farms take their place in a dominant position since they are able to offer productions of certified quality, recognized by the marks Dop and Igp; these certified products are well appreciated and valorized by European union consumers. In fact, the Italian export of products of certified quality, about 37% of the general European certified quality production, have been, last year, equal to 3.440 million of Euro (Source Ismea/ACNielsen). The provide statistical data seem to confirm a constant increase of food certified consumptions equivalent to 6,7% annual with good chance for the agricultural quality production to increase in value, mostly, on the foreign markets and not on the national markets, that are, now, in stagnation phase. The farms that produce extra virgin olive oil Dop and Igp during the five-year period 2000-2004 have increased the business volume of about 35,7% retrieving the decrease, very consistent, verified in the 2003 (Ismea, 2006).

The forecasts of middle period of Sace-Oxford economic forecastings foresee an increase of export capability of the Italian agricultural firms, that will place over the 30 million of Euro in 2010, despite the decrease of Italian exports to Germany, of 7% annual against a 2,8, pointed out in the past years; dynamic markets, as Romania and other countries, entered last years in the European Union, are again able to absorb in the next years 3,1% of Italian exportation in comparison to 2,9% actual of Italian export; in the next five years, it foresees in India, in Chile, in Turkey and in the U.S.A, a less meaningful growth (Ferri, 2006).

The olive farms able to sell certified productions, during the last years, have not suffered the interference from the great commercial and distributive structures; these last, in fact, has acquired a lot of great dimensions olive enterprises and olive farms with affirmed brands, giving origin to a very intense process of internazionalization, through the control of the block of shares, from foreign agri-industrial groups, concluding the operations of control, or "internazionalization in entrance", initiated in Italian agribusiness at the beginning of eighties (Banterle, 1997).

The interchange relationships among different countries could give origin to the phenomenons of instability, understood capability to influence and to determine some considerable effects during the commercial exchanges; the Italian agricultural farms have suffered phenomenons of instability from some countries as Greece, Spain and Portugal, characterized by agricultural food productions similar to those Italian (Arcuri, 1997).

Figure 5. Domestic buying of Italian agri-industrial (000 t)
(Source: Ismea, 2005)

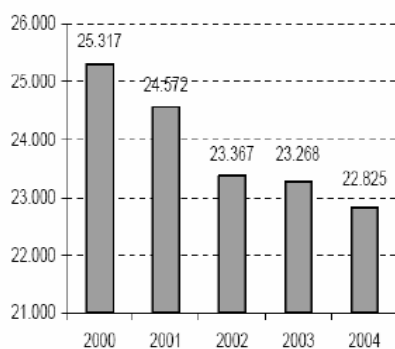
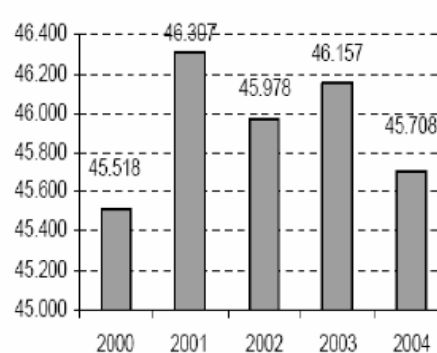
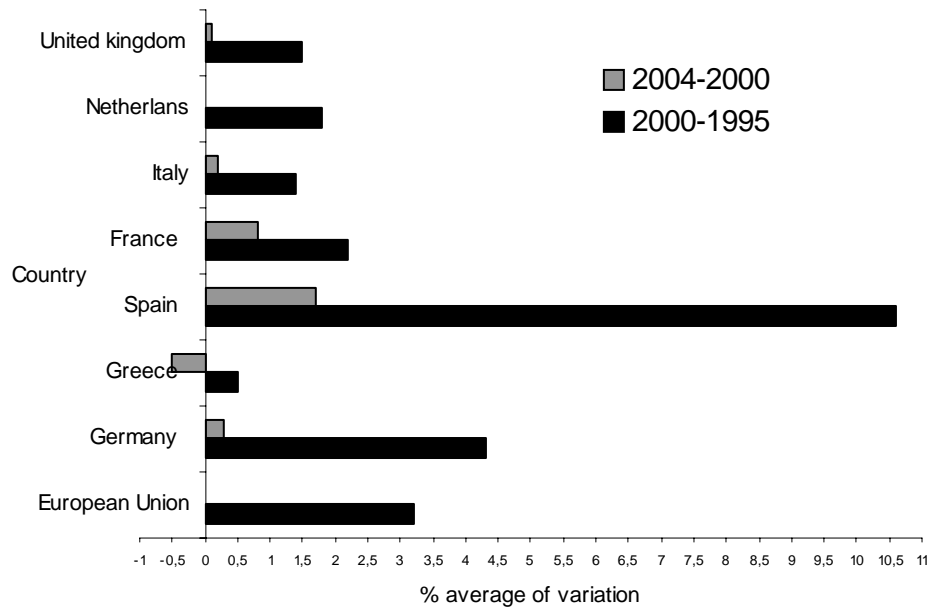


Figure 6. Domestic buying in Italy (mln €)
(Source: Ismea, 2005)

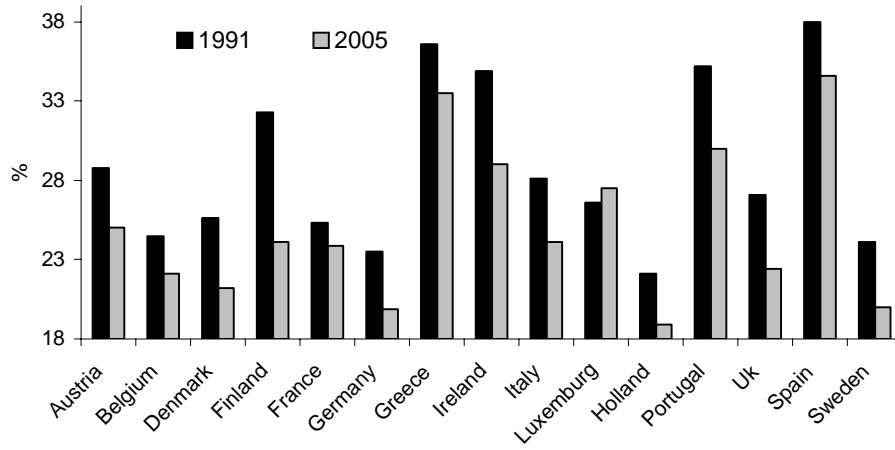


Graph 1. Annual average variation of agricultural value added, to base prices, in different European countries (Source: Ismea, 2005)

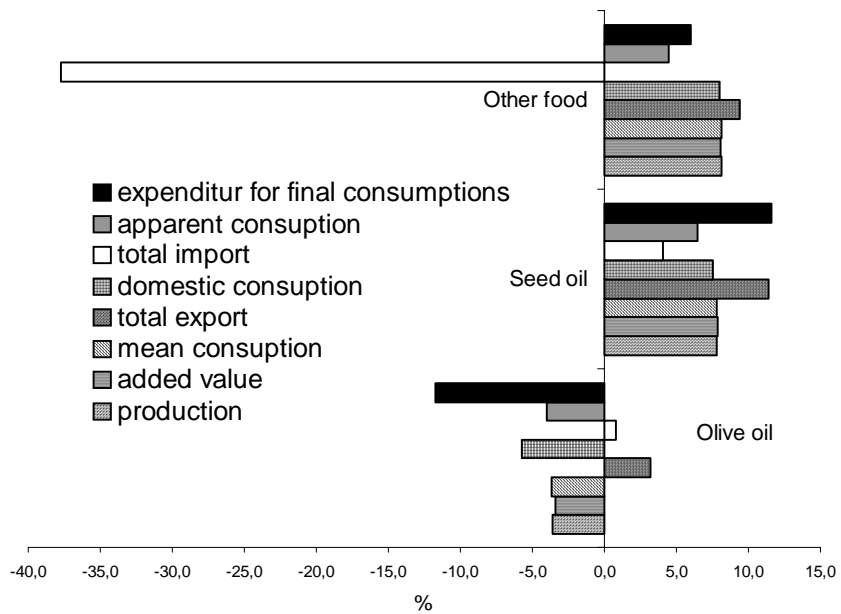


The increase in value of Italian agricultural productions, also in consideration of the multiplicity of offered products, cannot leave out of consideration the development of the territory and the certified productive specificities, equal to 6% of Italian agricultural production value (Deserti, 2000); the improvement of the product must not be considered as a limitation and a reduction of manipulation in the production process but as a complex trial that allows the basic commodities used to be easily individualized in the origin and in the place of production, and that have a lot of elements compulsory to guarantee an easy distinction and individuality (Casati, 2006), turning its own state from agricultural commodity to utility (food with high quality).

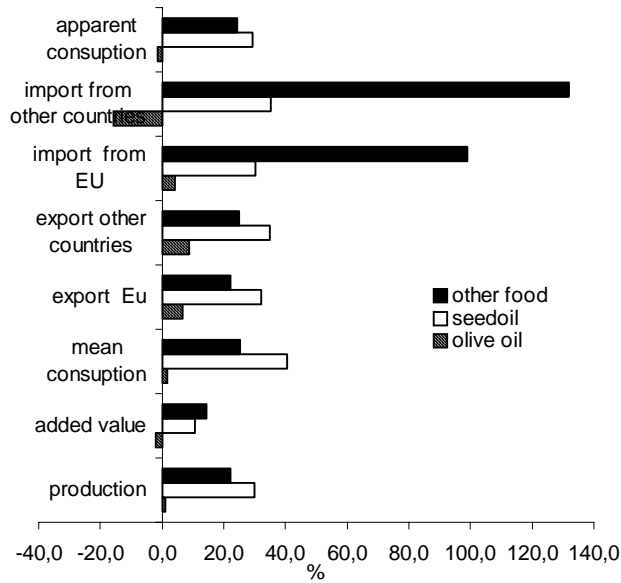
Graph 2. Food buying trend in different countries of European Union (Source: elaboration on Ismea data year 2005)



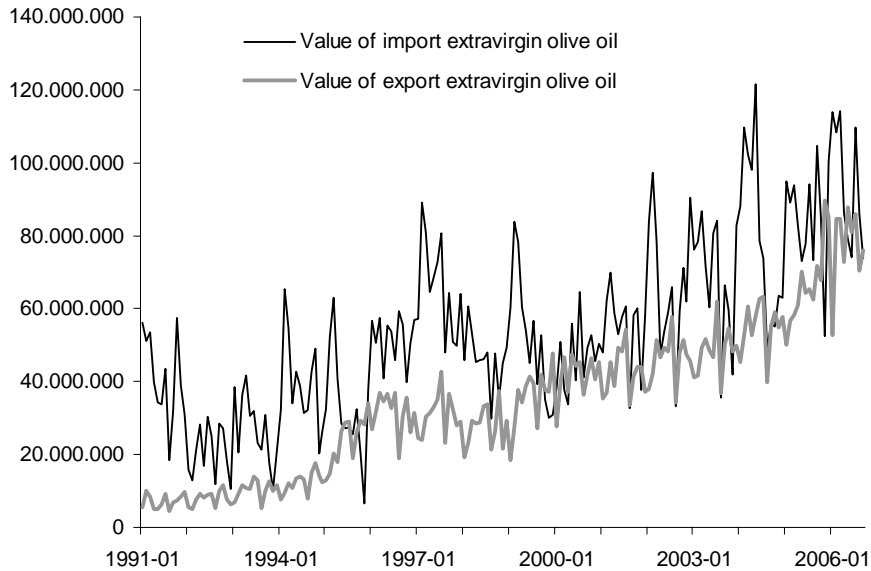
Graph 3. Olive and agri-industrial outlook in Italy (Source: Ismea)



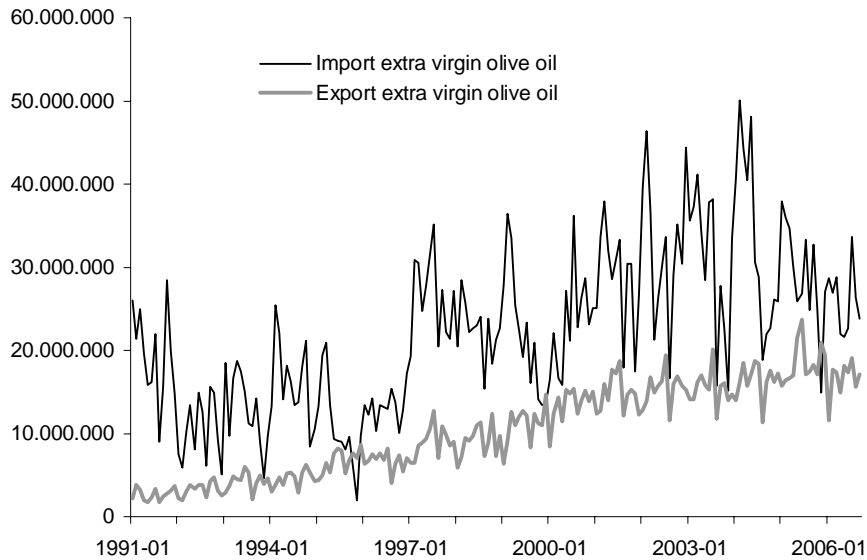
Graph 4. Italian export and performance outlook of olive substances (Source: Ismea)



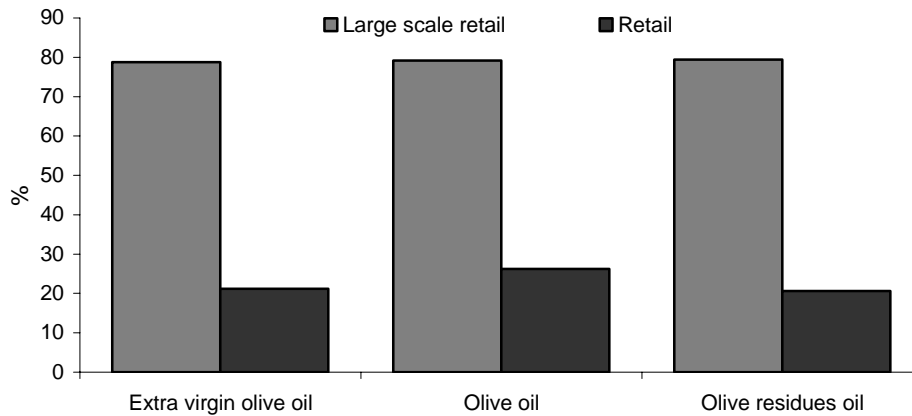
Graph 5. Time series of Italian virgin olive oil export in value (€) to the world (Source: elaboration on data Istat)



Graph 6. Time series of Italian virgin olive oil export in quantity (kg) to the world
 (Source: elaboration on data Istat)



Graph 7. Buying percentage of sale in different Italian distribution channels (Source: Assitol, 2006)



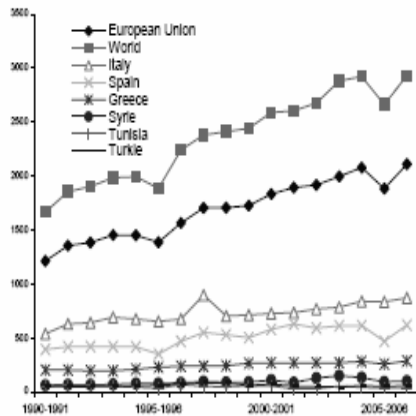
3. Objectives

This analysis has examined the consumption of certified quality agricultural productions in the European and Italian markets; this short poster paper has observed, in particular, the perspectives of growth in some agricultural productive sectors, as for example the olive oil industry. This analysis has made a comparison with a forecast proposed by the European Union about food consumption in the market, and the perspectives of growth in the Italian market as well.

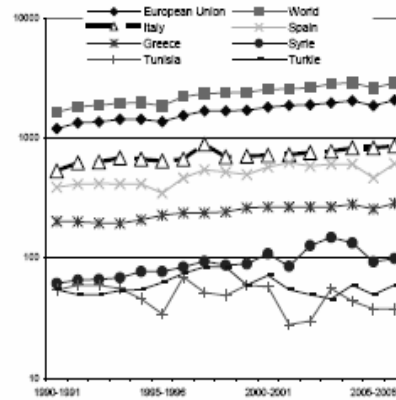
In this brief research there are illustrated the changes that have occurred, in the long period, in Italian families' food consumption. Using some statistic interpolations, comparing the transformations in the society, with those related to food consumption, and underlining the role of food quality certification, it is verified the importance of supporting economically the agri-business (Galluzzo, 2006b).

In the second part of this research, it is showed the strategic importance of what quality represents for the consumers, as an element able to influence the consumers' choices for certified quality olive products. Having compared the results of a case of study carried out on a focus group, with the help of 50 interviewed people, with those obtained by other studies, they pointed out the critical states that certified quality food productions might have for the consumers, the market, and even the farms.

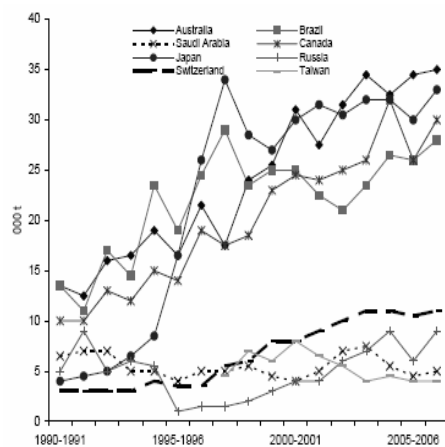
Graph 8. Olive oil consumption (t) in different countries (Source: elaboration on data Coi, 2006)



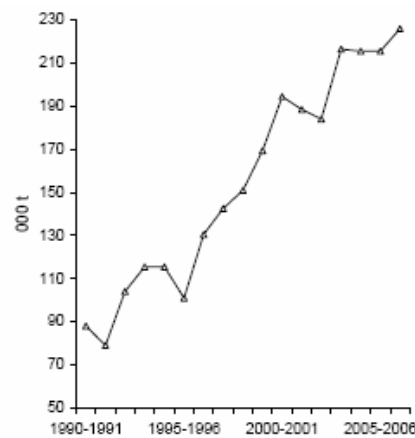
Graph 9. Standardized trend of olive oil consumption in different countries (Source: elaboration on data Coi, 2006)



Graph 10. Olive oil consumption (t) in some international market (Source: elaboration on data Coi, 2006)



Graph 11. Olive oil consumption in United States in tonnes (Source: elaboration on data Coi, 2006)



4. Results

The evolution of Italian food consumption, due to substantial changes, economically significant, of family incomes, has determined a radical change in consumers choices. In fact, they have preferred to address their choices to certified quality productions of (Ismea, 2005). Italian farms, consequently, have changed their business strategies in order to face this new challenge. In particular, after the changes, and the challenges brought by the new international agricultural policy, which has a fundamental goal in order to guarantee the safeguard of rural environment and the defence of the rural communities, so confirming the agricultural productive specialization of some territories (Galluzzo, 2006a).

In the last years European consumers has increased his/her own consumption propensity, even if the values are very inferior to those pointed out in the nineties and they are in slow increase; nevertheless, the research has shown that Italy, Germany and Holland have underlined, in the four-year period 2001-2004, a worsening of the rates of variation about real consumptions, losing positions in the classification of the European countries for per capita food consumption (Bella, 2004). The available statistical data related to expense percentage rate destined to the feeding expenditure on families general expense confirm a strong reduction of food expenditures, comparing the statistical data of year 1991 with those of year 2005, equal to a 58%, and in strong e very sustained decrease in particular in France, Luxemburg and Belgium; in North European countries seems confirmed, unlike what found in Greece and Spain, a percentage reduction of the income used for feeding expenditures in comparison to other expenses as freetime buying or purchase of luxury goods (Graph 2).

The analysis on the consumptions in Italy confirmed the decrease in families domestic purchases, in line with some indications appeared during other researches carried out by an Italian institute of research as Prometeia; analysis has, however confirmed a tendency to buy consolidated and structured enough, able to repay certified quality foods or/and organic foods (Figures. 5-6)

Middle period forecasts, carried out in Italy by Ismea has confirmed a strong increase of the consumptions and the Italian olive oil exports to north Europe countries (Norway, England, Germany) and Extra-European countries as States united (+21%) and Canada (+41%); in these countries Italian olive farms are clean exporters and they have edged up, in the considered periods, a very important and considerable increase of olive oil exportations (12.554 tons in June 2006 against the 13.653 tons surveyed in June 2005, Source Assitol) in comparison to statistical data pointed out last year, with a strong decrease of the importations (Graph 3-4).

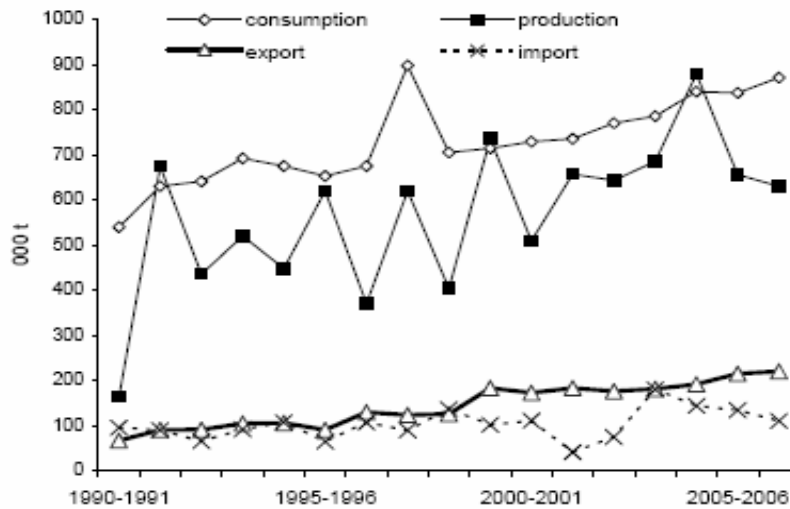
To margin of this research it is important to underline the strategic role of olive certified quality productions for the Italian farms, and in particular for all of them, in the next future, that they will know how to relate themselves with the Extra European countries and with some countries that overlook Mediterranean sea, as Turkey and Syria (Graph 8); in fact, an analysis of the consumptions of extra virgin olive oil (Coi, 2006), using standardized and normalized statistical data with logarithms, it has confirmed an increase of world olive oil consumptions, especially in new rising countries, while in the European union, and in Italy, particularly, the growth of olive oil consumptions is steady (Graph 9). On a international scale, the most greater increases in olive oil consumptions have been pointed out in Australia, Japan, Brazil, Saudi Arabia and Taiwan (Graph 10). The American market has confirmed a growth trend of Italian olive oil importations and with interesting perspectives of increase of total food consumptions (Graph 11).

In the long period, in Italy, the correlation among some quantitative variable, represented by the commercial flows (import/export) and by olive oil consumption and production levels (Graph 12), it has confirmed a direct and meaningful relationship between consumption and production and among production and olive oil exportation, while there are not e don't exist some notable relationships between Italian productions and

importations of olive oil with correlation values very low and without any statistical significances.

Graph 12. Italian olive oil market and consumption in the middle period

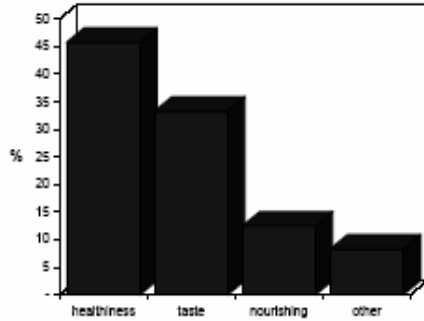
(Source: elaboration on data Coi, 2006)



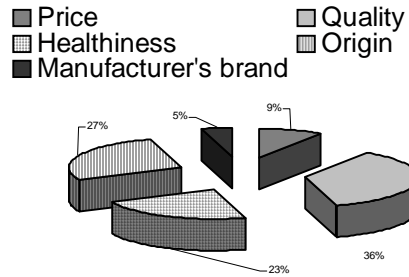
The present research pointed out the perspectives of growth of certified quality olive oil productions in the following years. It is very interesting for the Italian farms, and their extra-European markets. It is important to intervene with some specific marketing strategies that guarantee olive oil's traceableness and health aspects. The main problem for the Italian olive farms has always been to find new trade markets, and specifically understand what kind of marketing strategy it is important to carry out, for example, in two countries as Germany and Sweden. In these two countries some empirical experiences, carried out by some opinion polls on small groups of consumers and buyers of commercial distribution, through project initiatives financed by European Union, that have involved olive farms from different countries as Corsica, Italy and Slovenia, able to produce some quality olive oils, even if these farms don't belong to any consortium of quality olive oil production Dop or Igp, they have underlined the strategic importance of the business information (techniques of production, characteristics of productive areas) to increase the sales and the availability from the consumer to pay (willing to pay) something in more to buy an olive oil produced with organic methodologies and able to safeguard the environmental.

Other analysis have confirmed how much brought by other studies or rather a very remarkable change of the attitude of the consumer, even if the question toward innovative foods and/or of niche (biological, typical, etc.) it is enough interesting and tightly correlated with the partner-economic evolution of the territory (Casati, 2006), with the sour-alimentary specificities and with the cultural traditions as in the case of the De.C.O (Denomination of municipal origin), that a very limited and integrated value assumes on the territory; the De.C.O. they have the assignment to valorize the territory, the product and the historical and cultural traditions of the context, in ample sense, and to tie the territory and his/her cultural traditions to the product, with the purpose to create a connected substratum and shared with the market (Galluzzo, 2006c).

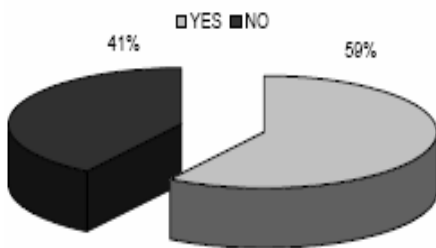
Graph 13. Motivations of consumption of focus group



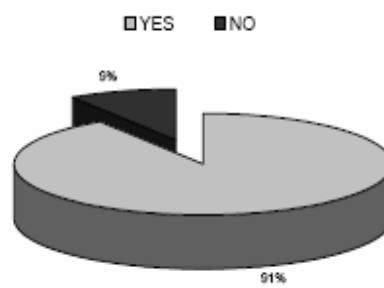
Graph 14. Elements that influence during buying phase



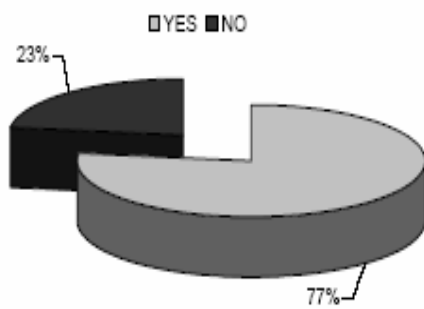
Graph 15. Capability of commercial brand to influence buying behaviours



Graph 16. Is the price an element able to influence the choices of the focus group?



Graph 17. Availability to pay a premium price for a certified olive oil



Graph 18. Which certified oil of olive would you choose in the buying phase?

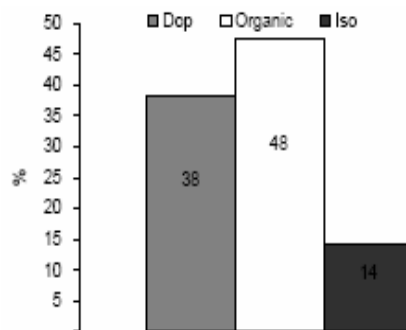
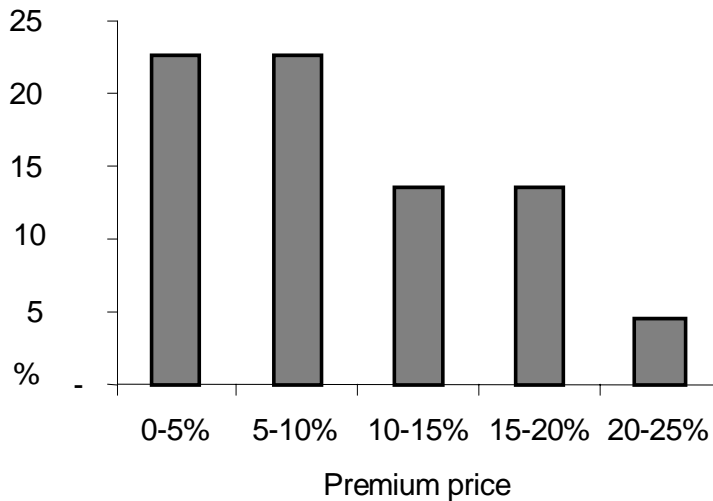
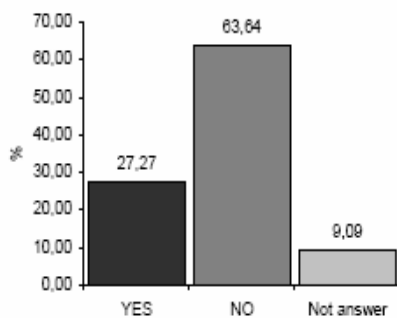


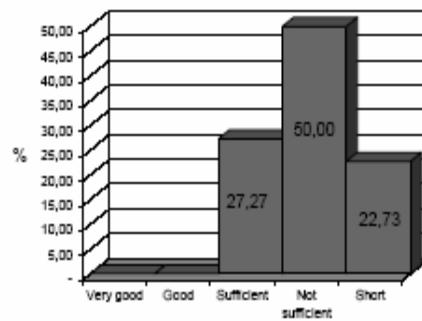
Figure 7. Incidence percentage of premium price to be paid for products of certified quality observed during the search in the focus group. On the abscissa axis the percentage of payable premium price and in ordinate axis the percentage of focus group



Graph 19. Level of knowledge among the different kind of olive oil certification (Dop, Organic, Iso)



Graph 20. Satisfaction level of communication from the institutions on the food quality



This research on the focus group has confirmed that food and sanitation (health and origin of food) aspects are very important (Graph 13). It has a greater effect considering the guarantee of quality, which is represented by the brand (Graph 14). It remains an important element, able to address and to influence the consumers' habits. In fact, during this research the focus group had to choose between two options: the aspect of health-quality and the origin of products (place of production). Food quality seems to manifest a certain strong influence and a meaningful effect on consumers' shopping.

In fact, during the focus group in which it was pointed out by a questionnaire with open answers, what can really influence the consumers' choices. In a meaningful way, it is the brand and the price of goods (Graph 15-16). These two aspects are linked together and may represent an element able to influence the consumers' willing to pay a higher price (premium price) for certified quality products (e.g. Igp, Dop) (Graph 17).

The focus group has assigned a greater trust to the production of an organic olive oil, able to safeguard the environment and the consumer's health; therefore, the choice of purchase among a Dop olive oil, an organic olive oil and a certified Iso olive oil would be direct towards organic and Dop productions, while an oil produced from a certified Iso firm has not been held able to influence the choice motivations during the purchase (Graph 18). This research has emerged as the most greater part of the focus group didn't know the difference that is among a certified olive oil Dop and a certified Iso olive oil (Graph 19). During this research the parameter that has appeared interesting, meaningful and able to operate as an important strategic incentive for the consumer, has been the price. The entity of premium price which can be paid, concerning the statistic example, (Figure 7) never overcame, though, the 25% more than the normal price paid for a certified Italian extra virgin olive oil; this willing to pay a premium price, as shown in the interviews, it is not able to cover the necessary costs of certification, necessary to guarantee and assure food quality, in order to confirm the results of other authors (Gay 2006, Cicia-Perla 2000).

5. Final remarks

This research has confirmed the consumer's modification of life and food consumption styles. All is addressed towards food able to protect ones health, and food recalling local traditions. The economic expectations for certified quality Italian olive oil are interesting but some problem occurred during the focus group test. It has been confirmed by other studies and investigations carried out by Ismea (difficulties understanding differences between certified quality food and non-certified quality food; problems occurred with the institutions unable to promote the quality and the differences of quality food).

The quality, although is not perceived in its specific and distinctive characteristic, it influences shopping habits. The interviews demonstrates how the farms and the politicians should advertise and promote the quality of goods (Graph. 20). The consumer has to perceive the differences and the specificities, which exist among different kinds of food, and among different types of quality (Dop, Igp, Iso, Organic). This analysis has, in fact, confirmed that there is not a complete knowledge of the differences that they exist among the different typologies of products of quality proposed, imputable to a short ability of the institutions to promote, with specific advertising campaigns, the food quality.

In particular, some empirical evidences have confirmed that in some European countries (Germany and Sweden) the perception of quality food and the information about olive farms and its productions is seen as essential by the consumers. This means a big effort for olive farms to be competitive in different European markets. Undoubtedly, the focus group is more interested in a guaranteed quality of the product, coded with a hallmark as Dop, Igp and more interested if it is an agricultural product, even if the price is still the main element, able to influence the consumers' choices. In this present research, it is shown how the consumer pays more money for healthier products. The premium price can pay back the cost overpaid by the olive farms to certify their own productions, and therefore support their market, their environment and a meaningful economic profitability for their own rural communities as well. There are expectations for a meaningful and innovative economic growth for Italian olive farms, which produce certified olive oil productions. There is also a positive and a correct, sustainable economic growth, which consolidates the development of agriculture, for example, a higher employment rate in olive farms, of which many mainly situated in central Italy and near the Apennine hillside. E-commerce is the instrument, which can guarantee more possibilities to increase the sales and the business dealing for organic and certified food. (Galluzzo, 2006d).

The results emerged in the present analysis have confirmed as the agro-industrial products Dop and organic are preferred from the interviewed subjects because able to guarantee the quality and the food healthiness, confirming the results showed in a precedent research about typical products and about the market capability to guarantee the food quality,

reported in a research of Nomisma about an Investigation on typical food in 2000. The role of the information is strategic to control and to direct the choices of the middle-low sector (class!?) (Nomisma, 2003) but, as shown in this research on the focus group, and in other empirical investigations carried out on extra virgin olive oil of quality on German and Swedish buyers, also a large and varied class/group of consumers with middle-tall culture and income levels, with the purpose to buy with a just price an olive oil able to satisfy the food safety demand.

The olive farms that produce certified quality oil have to put into practice some collaborative/cooperative strategies with the Large-scale retail trade with the aim to be an active subjects during commercial exchange, establishing some prices able to remunerate the olive productions of quality and to valorize the food quality. This research, despite Italy has a quite good specialization and a fair competitiveness in the olive oil exportations, has pointed out a lot of critical states as:

- 1) short strategic importance assigned by the olive farms and olive firms to the promotion, that is a main element for the export in Extra-European markets (Italy contributes for 65% on the extra virgin olive oil of the European union);
- 2) non strategic role assigned to the olive label and to the image of the olive farm; in particular the farmers don't realize the food quality role to valorise olive oil, the farm and the territory. The food quality is not exploited from olive farms to valorise their productions;
- 3) necessity to change the strategy of the Italian organic olive productions in the world;
- 4) reduced percentage incidence, less than 5%, among the olive certified production Dop sold on the market and the general olive quantity produced in the olive quality certified areas;
- 5) short affirmation of other olive certified productions of the central and southern of Italy in a perspective of increase in value and integrated of Italian food-quality;
- 6) the organic olive productions are located and are increased, primarily, in the olive areas where there are and are produced many food quality products (Tuscany, Umbria); all this showed a direct correlation between quality of the product and safeguard of the territory, realizable through the organic cultivation.

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