DENOMINATIONS OF ORIGIN (DOP) AND PROTECTED GEOGRAPHICAL INDICATIONS (IGP) IN THE EUROPEAN UNION: CONSIDERATIONS ON THE QUALITY POLICIES OF THE AUTONOMOUS REGIONS

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1. INTRODUCTION

The Community norms, through Ruling 2081/1992 and Ruling 2082/1992, highlight the European policy of promoting the diversification of food agricultural production, as well as the promotion and valuation of specific products, due either to origin, composition or production methods, thus contributing to provide the consumer with greater information and knowledge on these products. The first of the rulings refers to denominations linked, at least during some stage in their production, to a territory or region, being known as denominations of origin and geographical indications. The second ruling allows for the registration and certifying of food products with specific characteristics derived from their composition or from their traditional form of production; in other words, its objective is to distinguish and protect traditional foodstuffs, granting them the status of Guaranteed Traditional Speciality (ETG) and the right to use a logo that is specifically designed to distinguish them from the rest.

According to Ruling 2081/1992 of 14th July, a *Denomination of Origin* is understood as being the name of a region, a specific place or, exceptionally, a country which is used to designate an agricultural product or foodstuff that:

- is originally from said region, place or country and,
- has qualities or characteristics that can be due fundamentally or exclusively to the geographical medium with its natural and human factors and whose production, transformation and manufacture are carried out in the geographical area in question.

A *Geographical Indication* is the name of a region, a specific place or, exceptionally, a country which is used to designate an agricultural product or foodstuff that:

- is originally from said region, place or country and,

- has a certain quality, reputation or other characteristics that can be attributed to said geographical origin, and whose production and/or transformation and/or manufacture are carried out in the geographical area in question.

Denominations of Origin can also be those traditional denominations, geographical or not, that designate an agricultural product or foodstuff that comes from a region or specific place and which has a certain quality, reputation or other characteristics that can be attributed to said geographical origin and whose production and/or transformation and/or manufacture are carried out in the geographical area in question.

Firstly, we shall analyse the protected denominations of the EU and, in section 4, the first Guaranteed Traditional Speciality in the food industry, granted for Spanish *Serrano* ham.

2. EUROPEAN UNION DENOMINATIONS OF ORIGIN AND SPECIFIC DENOMINATIONS[1]

The denominations of origin (DOP) and specific denominations or protected geographical indications (IGP) recognised in the EU in 1999 can be seen in Table 1. We can highlight Italy, with six denominations of origin for white pig ham, of the eleven existing, and one protected geographical indication; then comes Spain, with four denominations – *Los Pedroches* is still not recognised by the EU – and both countries count for 65% of all denominations recognised. In addition to these, there are other denominations in Europe, but with a reduced production, such as those for Croatian and Slovenian ham.

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[1] The economic figures for the protected denominations of origin and protected geographical indications existing in the EU are those provided by their own associations, consortiums and regulating councils.

TABLE 1. DENOMINATIONS OF ORIGIN AND PROTECTED GEOGRAPHICAL INDICATIONS IN THE EUROPEAN UNION (1999)

COUNTRY	NAME	DENOMINATION OF ORIGIN (DOP) OR PROTECTED GEOGRAPHICAL INDICATION (IGP)
Belgium	Jambon d'Ardenne	IGP
Germany	Shwarzwalder Schinken	IGP
Spain	Jamón de Teruel	DOP
	Guijuelo	DOP
	Dehesa de Extremadura	DOP
	Jamón de Huelva	DOP
France	Jambon de Bayonne	IGP
Italy	Prosciutto di Parma	DOP
	Prosciutto di S. Daniele	DOP
	Prosciutto di Modena	DOP
	Prosciutto Veneto Berico-Euganeo	DOP
	Prosciutto di Carpegna	DOP
	Prosciutto di Toscano	DOP
	Prosciutto di Norcia	DOP
Luxembourg	Salaisons fummés, marque nationale du Grand-Duché de Luxembourg	IGP
Portugal	Presunto de Barroso	IGP
	Presunto de Barrancos	DOP

SOURCE: MAPA
Own production

From the point of view of production, Italy is the principal producer of ham protected by a denomination of origin or geographical indication. The production of ham with a denomination of origin represents more than 50% of the overall amount produced, estimated at 24 million legs.

The *Consorzio del Prosciutto di Parma*, the largest emporium protected by a denomination of origin in the world, with an overall production in 1998 of 8,650,000 legs, represents 43% of the total production of cured ham in Italy, as opposed to an estimation of 56% for the production of the remaining hams, both protected and unprotected. When created in April, 1963, the *Consorzio del Prosciutto di Parma* was made up of only 23 producers and, today, has more than 200 production companies[2], 3,000 employees, more than 9 million legs of ham produced, 1,360,000 hams exported to 40 countries and an overall turnover of more than 860 billion Euros.

Parma Ham is commercialised off the bone or sliced, and the market structure is made up of 85% internal commercialisation and 15% exportation, the other countries of the EU making up its main sales areas. In 1998, 1,110,510 de-boned hams were exported,

[2] As well as 5,400 pig farms and 175 abbatoirs.

85% of which went to the EU; 36,972 hams or cuts on the bone, which represents only 2.8%; and 170,298 sliced hams, which represent 13% of the overall foreign trade. France is the main importer of Parma Ham, taking 28.1% of the exportation, followed by Germany, with 27.6% and the USA with 12.7%. The North-American market began importing Parma Ham in 1989 and was the third-largest overseas market in 1998, importing 165,739 hams. The main destinations within the USA were California, Florida, Illinois, Miami, New York, Pennsylvania and Virginia. Japan, which began importation in 1996, is another important market and takes 4% of the overall exportation.

TABLE 2. BONED AND DE-BONED PARMA HAM EXPORTS (1998)

Country	No. Of hams 1997	No. of hams 1998	% of exportation	% variation	Kgs. 1997	Kgs. 1998	% variation
France	444,124	326,843	28.6	-26.4	3,040,056	2,279,941	-25
Germany	327,313	335,228	29.3	2.4	1,989,610	2,047,955	2.9
USA	129,916	164,716	14.4	26.8	920,104	1,199,853	30.4
UK	37,123	39,346	3.4	6.0	235,144	249,779	6.2
Switzerland	52,457	60,200	5.3	14.8	369,579	426,399	15.4
Belgium	72,641	60,981	5.3	-16.1	501,098	394,751	-21.2
Japan	40,662	52,584	4.6	29.3	293,768	381,929	30.0
Argentina	24,885	27,174	2.4	9.2	164,891	182,302	10.6
Austria	16,085	10,683	0.9	-33.6	107,276	72,856	-32.1
Denmark	2,097	1,814	0.2	-13.5	14,139	12,191	-13.8
Others	45,055	62,886	5.5	5.5	301,868	395,073	30.9
TOTAL:	**1,192,358**	**1,142,455**	**100**	**-4.2**	**7,937,533**	**7,643,029**	**-3.7**

SOURCE: *Consorzio del Prosciutto di Parma*

TABLE 3. EXPORTS OF SLICED PARMA HAM (1998)

	Hams			Packets of sliced ham			Kgs.		
Country	**1997**	**1998**	**% variation**	**Units 1997**	**Units 1998**	**% variation**	**1997**	**1998**	**% of exports**
UK	31,648	49,346	55.9	1,692,622	2,541,649	50.2	144,261	231,726	29.9
France	34,586	38,625	11.7	1,814,937	2,099,744	15.7	172,720	198,382	25.6
Germany	50,660	24,622	-51.4	2,636,686	1,299,196	-50.7	277,080	122,702	15.8
Switzerland	16,569	15,943	-3.8	872,002	886,460	1.7	77,229	77,182	9.9
Denmark	13,919	11,072	-20.5	869,664	712,468	-18.1	68,527	55,179	7.1
Belgium	13,425	10,339	-23.0	663,830	561,488	-15.4	63,327	51,281	6.6
Austria	7,630	6,090	-20.2	409,411	225,337	-45.0	34,239	25,134	3.2
USA	---	1,026	---	---	50,202	---	---	3,957	0.5
Others	1,714	2,319	35.3	87,542	155,641	77.8	7,561	10,408	1.3
TOTAL:	**170,151**	**159,382**	**-6.3**	**9,046,694**	**8,532,185**	**-5.7**	**844,944**	**775,951**	**100**

SOURCE: *Consorzio del Prosciutto di Parma*

TABLE 4. PARMA HAM EXPORTS (1998)

Parma Ham	**No. of hams 1997**	**No. of hams 1998**	**% variation 98/97**	**Kgs. 1997**	**Kgs. 1998**	**% variation**
On the bone	36,972	30,972	-16.2	329,456	275,653	-16.3
De-boned	1,155,386	1,111,510	-3.8	7,608,077	7,367,376	-3.2
Sliced	170,298	159,382	-6.4	845,980	775,951	-8.3
TOTAL:	**1,362,656**	**1,301,864**	**-4.5**	**8,783,513**	**8,418,980**	**-4.2**

SOURCE: *Consorzio del Prosciutto di Parma*

TABLE 5. TOTAL EXPORTS OF PARMA HAM. MAIN OVERSEAS MARKETS (1998)*

Country	No. Of hams 1997	No. of hams 1998	% variation 98/97	% of exportation	Kgs. 1998
France	478,710	365,468	-23.7	28.1	2,478,323
Germany	377,973	359,860	-4.8	27.6	2,170,657
USA	129,916	165,739	27.6	12.7	1,203,810
UK	68,771	88,570	28.8	6.8	481,505
Switzerland	69,026	76,143	10.3	5.8	503,581
Belgium	86,066	71,320	-17.1	5.5	446,032
Japan	40,662	52,584	29.3	4.0	381,929
Argentina	24,885	27,174	9.2	2.1	182,302
Austria	23,715	16,773	-29.3	1.3	97,990
Denmark	16,016	12,886	-19.5	1.0	67,370
Others	46,916	65,347	39.3	5.0	405,481
TOTAL:	**1,362,656**	**1,301,864**	**-4.5**	**100**	**8,418,980**

* Joint data for ham on the bone, de-boned ham and sliced ham.
SOURCE: *Consorzio del Prosciutto di Parma*

Canada began importing in June, 1997 and, like the Argentine market, has a very promising future.

The EU recognised the *Prosciutto di Parma* denomination of origin in 1996.

The *Consorzio del Prosciutto di San Daniele* is the second most important ham-producing business association protected with a denomination of origin, after Parma. It is made up of 27 industries[3] - of which seven are considered traditional – and a production of 1,880,866 hams. The productive capacity is over 3 million hams and the protected ham covers 65% of potential production, with a turnover of almost 50 billion pesetas. San Daniele Ham, the most expensive in Italy, accounted for almost 14% of national ham consumption in 1998. About 14.5% of overall production is for export, the main markets being the USA, Japan and the EU.

[3] It also has 2,248 pig farms and 32 abbatoirs.

The *Consorzio del Prosciutto di Modena* is made up of 18 industries and has a production of 1,500,000 hams, of which only 150,000 are stamped with the denomination of origin. Turnover is estimated to be around 18-20 billion pesetas, of which the protected turnover accounts for between 1.5 and 2 billion pesetas. The production goes wholly to the internal market.

With regard to the other Italian ham denominations of origin[4], we can mention *Carpegna Prosciutto*, which is made up of only one company and has a production of 130,000 hams, of which a third is exported to other EU member states, Japan, the USA and China. Then we have the *Consorzio del Prosciutto Toscano*, made up of 21 companies producing denomination-protected hams, with a turnover of 7.5 million Euros and 20% of production going to the EU; the *Consorzio del Prosciutto Veneto Berico-Euganeo*, consisting of 11 companies, of which only 8 produce denomination-protected ham. Production is 61,446 hams, with a turnover of 9 billion Lire, of which 2% of overall production is sent to countries such as Austria, Germany, France and Switzerland. Lastly, we cannot forget the *Consorzio del Prosciutto di Norcia*, which is made up of 10 companies, but for which we do not have any economic data, since the EU only recognised this IGP in 1999 and it has therefore only been in operation for a few months.

Germany figures in second place in the EU in terms of the number of denomination-protected hams; in other words, backed by a protected geographical indication. There is only one specific denomination, *Schwarzwalder Schinken*, but with a production of 4.2 million legs, equivalent to 21,000 tonnes, the average weight of each leg of ham being 5 Kgs. Distribution in Germany accounts for 19,000 tonnes and the remaining 2,000 tonnes are exported mainly to other European markets. The German consumer prefers the pre-packed sliced-ham format, of which 46 million units were sold in 1998, 1.5 million more than in 1997. There are 31 production companies in the association.

[4] There is no aggregate economic data for Italian denominations of origin; the information can only be obtained from each of the companies making up the respective consortiums. We should mention here that the *Carpegna Prosciutto* denomination of origin consists of only one company.

Spain has the most denominations of origin for ham in the world, after Italy, though protected production does not reach even 1% of the overall production. We shall analyse this in the next section.

In France, Bayonne Ham has 100 associated companies, of which 25 are traditional producers and 75 fit into the category of small- and medium-sized companies. Production is one million hams per year, with a turnover of 50 million Francs. The ham is mainly commercialised in the French market and the low proportion of exports goes mainly to northern-European countries. The specific denomination *Jambon de Bayonne* was recognised by the EU in 1998 and production of denomination-protected hams has not yet begun.

The two denominations of origin in Portugal, as well as that of Belgium and Luxembourg, produce a relatively insignificant number of hams.

3. THE DENOMINATIONS OF ORIGIN OF IBERIAN AND WHITE HAM IN SPAIN

Spain has four denominations of origin for ham, recognised by the EU, together with another two denominations that are only recognised by the Andalusian Regional Government:

- *Jamón de Teruel* denomination of origin, the first in Spain and the third in the world, after the denominations of *Prosciutto di Parma* and *Prosciutto di San Daniele*. Ruling: O.M. 7-3-1985, *BOE*, 13-6-1986.
- *Guijuelo* denomination of origin. Ruling: O.M. 10-6-1986, *BOE* 13-6-1986.
- *Dehesa de Extremadura* denomination of origin. Ruling: O.M. 2-7-1990, *BOE* 3-7-1990.
- *Jamón de Huelva* denomination of origin. Ruling: O.M. 12-7-1995, *BOE* 18-7-1995.
- *Los Pedroches* denomination of origin. Ruling: Order 30-1-1998, *BOJA* 21-2-1998. Recognised only by the Andalusian Regional Government. Production has not yet begun.

- *Jamón de Trevélez* specific denomination. Ruling: Order 19-5-1998, *BOJA* no. 62 (1 of 2), 4-6-1998.

There is, therefore, one denomination of origin for white ham, *Jamón de Teruel* and four for Iberian ham. The *Los Pedroches* denomination of origin and the only protected geographical indication, the *Jamón de Trevélez* specific denomination have been granted by the Andalusian Regional Government, the latter is currently preparing the documentation for recognition by the Ministry of Agriculture which will lead to its eventual recognition by the European Union.

In 1998, the total economic value of products protected by denominations of origin and specific denominations was 58,930 million pesetas (354 million Euros), of which 5,461 million pesetas (32.82 million Euros) corresponded to hind leg hams (not shoulder); in other words, 9.27% of the overall value. If we deduct the value of the exports of protected products, estimated to be 9,230 million pesetas (55.47 million Euros) and take into account only the home market, and given that denomination-protected hams have not been exported, this percentage rises to 11% of the overall economic value.

The total production of protected shoulders and hams, at 320,722 units, only represents 0.9% of the ham sector’s production, estimated to be 35 million units, the turnover being 2.3% of an overall value of 268.3 billion pesetas. Iberian pig shoulder and ham, protected by the denomination of origin, which account for 209,886 units and an economic value of 5 billion pesetas, represent 0.05% and 0.07% of the overall production and turnover of Iberian units, estimated at 4 million units and 73.4 billion pesetas respectively. White pig ham that is protected by a denomination of origin, with 110,836 units and an economic value of 1.15 billion pesetas, represents 0.004% and 0.006% of the overall production and turnover of white pig, estimated at 31 million units and 195 billion pesetas, respectively.

The economic tendency in the production of hams that are protected by denominations of origin has been extremely favourable right from the outset, although, in the last five years, it has remained stable at around 260-270,000 units. There was a drop in the production of protected Iberian hams, around 20%, during 1998, as opposed to Iberian shoulders, which maintained an upward trend. A special mention should be made of the production of the *Jamón de Teruel* denomination of origin, which has grown by 21% and has very promising short-term expectations, given the high demand in its two main markets: Catalonia and Aragon.

The number of companies registered in the denominations of origin, dedicated either to curing or ageing, is 223, as opposed to 205 in 1997, there being a higher number of companies registered in the *Guijuelo* and *Dehesa de Extremadura* denominations of origin, given the small-hold nature of the region's industries and an inadequate production structure.

The *Jamón de Teruel* and *Guijuelo* denominations, which have a similar commercialisation of around 110,000 units, stand above the rest, since they account for 44% and 43% respectively; the *Jamón de Huelva* (8%) and *Dehesa de Extremadura* (5%) denominations represent, overall, 13% of the total commercialisation. The *Los Pedroches* denomination of origin has not yet begun production.

The price of Iberian pig shoulders and hams depends on whether the pigs were fed solely with acorns, with a mixture of acorns and pig-feed or solely with pig-feed. Only the *Dehesa de Extremadura* denomination of origin includes all three qualities. Iberian Ham from pigs fed on acorns is the most expensive in the world and varies between 5,500 pesetas/kg. for Huelva Ham and 4,100 pesetas/kg. for Guijuelo Ham. The price of 'Acorn' ham rose by 10% in 1998, except for Huelva Ham, which rose by 1000 pesetas/kg.; in other words, 22%, while the prices for 'acorn/pig-feed' hams and 'pig-feed' hams, which are of a lower quality, have dropped slightly.

TABLE 6. HAM DENOMINATIONS OF ORIGIN. ECONOMIC VALUE IN PESETAS (1998)

Denominations of origin	COMMERCIALISATION				ECONOMIC VALUE OF DENOMINATION		
	No. OF UNITS COMMERCIALISED		AVERAGE PRICE (Ptas./Kg.)		'000s Pesetas		% over full economic value
	Hams	Shoulders	Hams	Shoulders	Hams	Shoulders	
JAMÓN DE TERUEL	110,836	---	1,300	---	1,152,694	---	18.61
GUIJUELO	85,762 (1) 23,260 (2)	21,767 (1) 8,414 (2)	4,100 (1) 2,700 (2)	1,800 (1) 1,300 (2)	2,566,857 (1) 458,455 (2)	190,026 (1) 53,050 (2)	52.77
DEHESA DE EXTREMADURA	10,372 (1) 420 (2) 1,893 (3)	15,440 (1) 809 (2) 1,860 (3)	5,000 (1) 4,100 (2) 2,850 (3)	2,700 (1) 2,200 (2) 1,900 (3)	388,950 (1) 12,915 (2) 40,463 (3)	208,440 (1) 8,899 (2) 17,670 (3)	10.94
JAMÓN DE HUELVA (*)	20,372	19,517	2,900	2,900	840,345	254,697	17.68
TOTAL:	252,915	67,807			5,460,679	732,782	100

Number, average price and economic value of (1) Iberian 'acorn' ham or shoulder, in Guijuelo: Class I; (2) Iberian ham or shoulder from pigs fed on acorn/pig-feed mix, Guijuelo, Class II Iberian Ham; (3) Iberian ham or shoulder from pigs fed solely on pig-feed.
(*) No hams have yet been produced, since they have not yet reached the minimum 18 months of curing. However, we have considered the hams that are still controlled by the Regulatory Committee, in order to find the economic value of the "Jamón de Huelva" denomination of origin and the percentage that it represents within the denominations of origin for ham.
SOURCE: General Office for Denominations of Quality.

We should also highlight the moderate price of white-pig ham from the *Jamón de Teruel* denomination of origin: 1,300 pesetas/kg., which represents a value of 1.15 billion pesetas and 18.61% of the overall turnover of protected hams. In Iberian hams, the *Guijuelo* denomination of origin accounts for over 50% of the overall turnover.

The average weight of protected Iberian legs of ham is around 7.5 Kgs., a level which is considered optimum, as opposed to 8 Kgs. Fro white-pig legs of ham, from the *Jamón de Teruel* denomination of origin.

The specific denomination *Jamón de Trevélez*, the first in Spain, although it is only recognised by the Andalusian Regional Government, protects quality hams by correctly controlling the legs before curing, as well as the production process and the characteristics of the cured ham as a final product. An attempt has been made to abandon the 'industrial' image of hams on the market and to guarantee a standard quality for the consumer. The production of ham under the denomination of origin *Jamón de Trevélez* began on 1st October, 1997. The number of hams labelled during the 1997-99 period reached around 180,000 units, of which more than 50,000 hams have now been commercialised. In 1999, a timid marketing process has been undertaken in Germany and Switzerland, mainly of de-boned ham and in January, 2000, the first shipment of hams was sent to Japan, seeing as how various companies in the region have been given recognition in said country.

We should point out here that no ham with a denomination of origin, neither white nor Iberian, has been marketed abroad until 1999, though there have been many attempts by companies to penetrate the various markets of the EU, mainly Germany and France, as well as Switzerland and the USA. Various regulatory committees of Iberian ham have great hopes pinned on the North-American market and aim to obtain commitments for the sale of Iberian hams in the short term. It is also true that Iberian 'acorn' ham has no competitors in the world, due to the unique process involved and the fact that there is no area of pasture similar to that of western Spain, except for, maybe, certain parts of California, South Africa or Australia, but which are insignificant areas in terms of ham production. However, in Europe, consumers choose Parma Ham or San Daniele Ham, which are possible competitors for Classes II and III Iberian Ham, though with differing qualities.

Finally, we should bear in mind that Spain, in spite of being the main producer and consumer of ham in the world, produces only 1% of ham protected by a denomination of origin, as a percentage of overall production; a figure which is way below the production of other European countries such as Italy or Germany, where denomination-protected hams account for more than 50% and 70%, respectively, of their overall production.

4. *SERRANO* HAM, THE FIRST GUARANTEED TRADITIONAL SPECIALITY (ETG) OF THE EUROPEAN UNION.

Serrano (or highland) ham is one of the exceptional products that Spain has contributed to the gastronomic wealth of the European Union. Due to its special characteristics and intrinsic quality, it has been granted the utmost distinction and protection that EU legislation can provide: Guaranteed Traditional Speciality. This recognition, published in the *Official Diary of the European Communities* (DOCE) L-291, of 13th November, 1999, which includes Ruling 2419/1995, incorporating "*Jamón Serrano*" into the Register of Guaranteed Traditional Specialities (ETG), makes it the first Guaranteed Traditional Speciality in the Spanish food industry and, indeed, the first in Europe with a reserved name; in other words, it has the sole right to use the name "*Jamón Serrano*" – and its translation into all the other official EU languages – as well as having the right to use a logo that has been designed to distinguish these products from all others. It is a collective quality brand, a quality label, which serves to differentiate "*Jamón Serrano*" from other hams that it could be mistaken with, thus becoming a guarantee of quality for the consumer and an added value for the products that are branded with this logo. In order to obtain the Guaranteed Traditional Speciality of "*Jamón Serrano*", a series of conditions have been drawn up to include the minimum requisites of quality that all these hams should fulfil; in other words, a number of norms that must be met in order for cured ham to become *Serrano* ham, guaranteed by a series of controls carried out by independent, impartial and efficient certifying bodies.

The ETG of *Serrano* ham will contribute towards clarifying the ham market and will become a guarantee of quality for the consumer and, therefore, an added value for those products that bear the symbol. Thus, *Serrano* ham has taken a road in the EU that will be an example to be followed by the rest of the food industry. A complete change and a challenge that, as from 1st March, 2000, when the ETG for *Serrano* ham came into effect, makes us analyse ham production in Spain in another light. In short, a perfect way to protect, typify and improve the image of *Serrano* ham, the certification of the product, which is a priceless marketing tool and a way in which the small- and medium-sized companies involved in ham production can improve their competitive position, which, in turn, will be extremely useful in the EU markets for promotion in the target markets where the consumers value and appreciate products that are backed by a brand of quality. It is a new approach for *Serrano* ham, which will put an end to the anarchy and confusion reigning in the ham industry, thanks to the registered denomination of "*Jamón Serrano*"[5].

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To sum up, therefore, we should point out that the regional policies of quality for ham in the European Union are centred on and aimed at protecting this product by means of

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[5] This is in spite of the better quality that many ham products may have from the other production areas of Spain, which have a long-founded tradition, but which cannot be called *Serrano* hams, even though they are produced and cured in some of the most traditional highland areas of Spain.

denominations of origin and protected geographical indications. In Spain, these denominations are proposed by the Regional Governments and then ratified by the Ministry of Agriculture, Fisheries and Food, thus leading to the product's recognition both at a national and international level. This type of protection, known in Spain as 'denomination of origin' and 'specific denomination' normally clashes with the interests of the bigger national ham-producing firms, which have managed to place their brand name, or gain prestige for it, on the market and who see serious competition in these policies of quality[6]. This is why some of the denominations in Andalusia, such as *Los Pedroches* have not yet begun producing or why the factories of *Jabugo* ham have not formed part, nor are interested in, the denomination of origin *Jamón de Huelva*.

It is not surprising, therefore, that Spain, in spite of being the main producer of ham in the world, as well as the second-biggest exporter, has a protected ham production of only about 1% of the overall production.

Italy is a different case, where the major ham-producing firms operate under the protection of the denominations of origin. Italy has always known how to sell and merchandise its products, a sign of which is the high level of acceptance that Italian olive oil or ham has in the USA; two products that are considered synonyms of Italy. The most adequate R&D policy for Spanish ham in the coming years would be that of C&D; in other words, *Copy and Development,* in which we would copy the example of Italy, doubtlessly Spain's great ally in European and international markets.

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[6] The top ten ham-producing firms concentrate 30% of the overall production, but without any type of denomination protection. We should mention here that Spain is the most brand-conscious country in Europe.

Legislation on quality denominations in Spain and the basic norms of the European Union:

- Law 25/1970, of 2nd December. Estatuto de la Viña, del vino y de los Alcoholes. *BOE* 291 of 9th October.
- Decree 835/1972, of 23rd March. Reglamento para la ejecución de la Ley 25/70. *BOE* 87 of 11th April.
- Royal Decree 2766/1983, of 5th October. Traspaso de funciones y Servicios del Estado en materia de Denominaciones de Origen. *BOE* 265 of 5th October.
- Royal Decree 1573/1985, of 1st August. Regulación de las Denominaciones Genéricas y Específicas de Productos Agroalimentarios. *BOE* 214 of 6th September.
- Royal Decree 157/1988, of 22nd February. Normativa a que deben ajustarse las Denominaciones de Origen y las Denominaciones de Origen calificadas de vinos y sus respectivos reglamentos. *BOE* 7 of 24th February.
- Royal Decree 728/1988, of 8th July. Normativa a que deben ajustarse las Denominaciones de Origen, Genéricas y Específicas de productos agroalimentarias no vínicos. *BOE* 166 of 12th July, 1988.
- Royal Decree 1254/1990, of 11th October. Por el que se regula la utilización de nombres geográficos protegidos por Denominaciones de Origen, Genéricas y Específicas en productos agroalimentarias. *BOE* 250 of 18th October.
- Royal Decree 2081/1991 of the Council, from 24th June, 1991. Sobre la producción agrícola ecológica y su indicación en los productos agrarios y alimentarios. *DOCE* of 22nd July, 1991, no. L 198.
- Ruling (EEC) 2081/1992 of the Council from 14th July. Relativo a la protección de las indicaciones geográficas y de las Denominaciones de Origen de los productos agrícolas y alimenticios. *DOCE* of 24th July, 1992, no. L 208.
- Ruling (EEC) 2082/1992 of the Council from 14th July. Relativo a la certificación de las características específicas de los productos agrícolas y alimenticios. *DOCE* of 24th July, 1992, no. L 208.
- Order of 25th January, 1994 by the MAPA. Por la que se precisa la correspondencia entre la legislación española y el Reglamento (CEE) 2081/1992 en materia de Denominaciones de Origen e indicación geográfica de los productos agroalimentarios. *BOE* 23 of 27th January, 1994.