

Typical Products and Marketing Strategies for Sicilian Olive Oils

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The research analyses the Sicilian Protected Designation of Origin (PDO) olive oils chain in the contest of Sicilian rural development and as an instrument aimed to add value to agricultural production.

Olive oil is a characteristic product of Southern Italian and Mediterranean agriculture and one of the main agro-food production of some Southern Italian Regions; it plays a leading role in Sicilian agricultural production and it can be considered the most representative typical products of Sicilian rural environment, rural culture and eno-gastronomic tradition. Origin labelled oils are a small but important part of extra virgin olive oil chain process. Even if the present production areas of Sicilian PDO olive oils cover a large part of the region and almost the whole region constitutes a wide quality oil production area, the sold amounts of these products result still lower than the potential.

To propose a strategy aimed to improve Sicilian typical oil market, we analysed demand and supply, opportunities and threats. Improving proposals are classified according to supply chain subjects and marketing mix steps.

¹ The paper is the result of the collaboration of the authors. The text is attributed as follows: section 1 and 3 to P. Giacomelli, section 2 to S. Corsi, section 4 to M. Polelli

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1. Introduction

The Italian legislation (D.Lgs 30/2005) identifies the “collective label” as a label requested by a number of subjects, directly or indirectly involved in the production, which guarantee quality, nature and origin of a product or a service. Only products which respect fixed standards can obtain the collective label.

The most important differences between a traditional trade mark and a collective label can be defined as 1) the “legal ownership”, 2) the quality definition procedures.

In fact the trademark’s owner generally sells the labelled products, takes the whole economic advantages and guarantees the consumers about quality, nature and origin. The collective label needs two legal subjects: the first is the label owner who could be a public authority, a consortium, a cooperative society or an association among any of these subjects. The second legal subject are producers which use collective label to mark products and sell them.

Secondly whereas the quality of traditional trade mark is associated to the firm reputation, a collective label guarantees production standards and quality of inputs through a certified system of rules and procedures.

The production should be defined by a specific regulation, including:

- product specification,
- inspection body,
- disciplinary measures.

The collective label’s owner checks and verifies correspondence between products and regulation.

A particular kind of collective label is the “geographic collective label”, which identifies quality, nature and, specially, geographic origin of a product. Geographic origin is the most distinctive feature of the product.

In Italy there is a high number of geographic collective labels that can be either agro-industrial or not. This latter case is less known even if more than 400 not agro-industrial geographic collective labels are already registered. Some of them concern a kind of product, for examples the “Vetro artistico di Murano” (collective label for Murano artistic glass), others concern clusters of similar products, “Mobile d’arte in stile della pianura veronese” (artistic furniture from Verona), “Cremona liuteria” (musical instruments from Cremona), finally others concern different craftmade products coming from the same areas, Kos (collective label for goldsmith's artistic objects, traditional ceramics, musical instruments and traditional artistic textiles from Cosenza).

The designation of origin could be similar to geographic collective label, but the first guarantees also the quality of the product.

The main differences between designation of origin and geographic collective label are synthetized in the following table.

Tab. 1 Differences between designation of origin and geographic collective label

| | designation of origin | geographic collective label |
|----------------------------|---|--|
| Registration requesting | Producers’ associations | Associations, public authorities, private subjects, etc. |
| Name | Already known | New |
| product specification | Cohering with art. 4 reg. CE 2081/92 | Privatistic form |
| Use right | Every producer who respects product specification | Requesting subject |
| Control and certification | Third party | Requesting subject |
| Object of the registration | A definite product | Also different product |

Designation of origin and geographic collective label are related to the idea of “typicalness” that is the link between product and production area as the trade-off of culture, productive input, natural environment and know-how. We can identify driving forces of “typicalness” through the following table.

Tab. 2 Driving forces of “typicalness”

| | Location/Area | Production input | Production techniques |
|-----------------------------------|--|-----------------------------------|--------------------------------------|
| raw materials | Municipal, provincial, national, foreign | Breed, species, typology | Treatment, working, cultivation |
| transformation | Municipal, provincial, national | Special manufacturing, processing | Chemical and physical parameter, |
| Seasoning, maturing, conservation | Municipal, provincial, national | | Seasoning time, conservation methods |

One of the most important feature of a typical product is the raw material supply and transformation basin that allows to identify four typical clusters of products:

1. **Cluster 1:** Typical products with broad raw material supply basin and broad transformation basin. They could reach national and international markets but they could have heterogeneous features in relation with the high production and the big number of producers. They could also have falsification risk in market where designation of origin or geographic collective label are not admitted and protected.
2. **Cluster 2:** Typical products with broad raw material supply and narrow transformation basin. They have strength and weakness like those of the first cluster.
3. **Cluster 3:** Products with intermediate features. Only a narrow share of production reaches national and international market, whereas the most part reaches only local and regional market.
4. **Cluster 4:** Niche products with narrow raw material supply basin and narrow transformation basin, completely consumed in local market or by a little group of lovers.

Typical products have the potential demand higher than the real offer. Referring to the “objective freedom triangle theory” we could individuate the weaknesses of typical products market and define the promotional movement.

Typical products has considerable limits in production ability and in exchange ability in particular for clusters 3 and 4.

The effects of collective promotion are debated in literature and can involve either demand or supply of products (fig. 2).

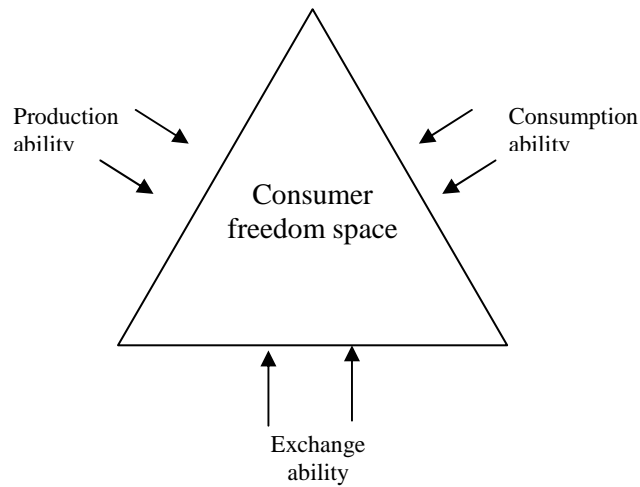


Fig. 1 Objective freedom triangle theory

The first plausible effect of promotion on demand is the translation rightward (from D to D_1) connected either with the pro-capita consumption increase or with consumers increase. In case of ostentatious role of a product (e.g. vintage wines) the promotion can lead to a decrease of demand curve elasticity (from D to D_2). On the contrary we can have a higher elasticity of demand (from D to D_3) if the willingness to consume the product increases without price variation.

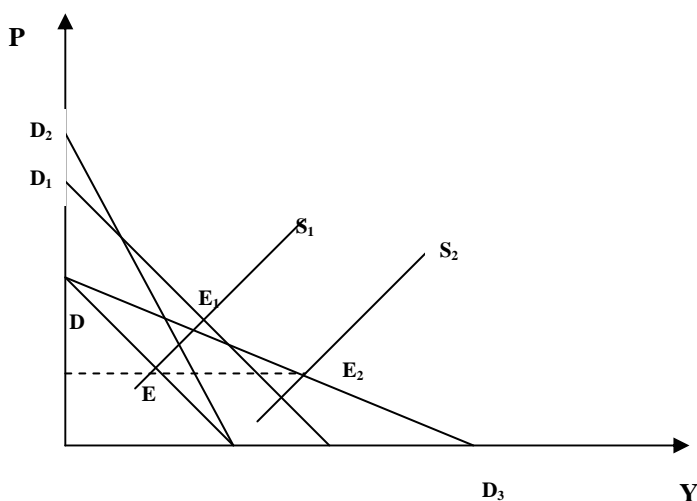


Fig. 2 Alternative effects of collective promotion

The effects of promotion on the supply are connected with the access chance for new producers. If they do not have this chance, promotion could allow an increase of production and benefit for

producers (from E to E₁). If there is free access for new producers, promotion could translate the supply curve from S to S₁ (Gregori, 1997).

The study, developed with Touring Club Italiano and Regione Sicilia, concerns the agro-food chains of Sicilian origin labelled products and in particular olive oils. The research aims to analyse different steps of origin labelled olive oil, to identify involved subjects, to underline system strength and weakness and to propose structural improvements.

The study made use of analysis on international and national olive oil market and of a direct survey on protection consortium, producers, oil mills and retail trade organisations.

2. Extra virgin olive oil in Italy and Sicily

Olive oil is a characteristic product of South Italian and Mediterranean agriculture and one of the main agro-food production of some South Italian Regions; it plays a leading role in Sicilian agricultural production and it is more representative of Sicilian rural environment, rural culture and eno-gastronomic tradition than other typical products.

According to a recent research of Confagricoltura, Italy is one of the most important olive oil producer with more than 800,000 t olive oil production, equivalent to 961 millions euro, pertinent to harvest 2004/2005, with 13,5% increase in comparison with the previous year. Sicily occupies the third position for production with more than 50.000 t, after Puglia (287,000 t) and Calabria (279,000 t). Italian olive oil production has been increasing in the last years especially thanks to southern regions.

Moreover, the research notices also that the consumption, more than 1,4 thousand millions euro, is increasing both in Italy (+ 6.1% in comparison with the previous year) and in the other traditional producing countries. The most interesting increase is shown by some countries, which in the last decade doubled (France, USA) or tripled (UK, Germany) olive oil consumption.

Even the production of quality olive oil is increasing, with 5,620 t produced in Italy in the last year, equivalent to 63 millions euro.

2.1 Quality olive oil chain in Sicily

Sicilian olive production area is about 150,000 hectares with more than 200,000 farms, but only one is specialized in olive production. About 250,000 t/year are addressed to oil production. Fig. 3 explains the olive oil chain.

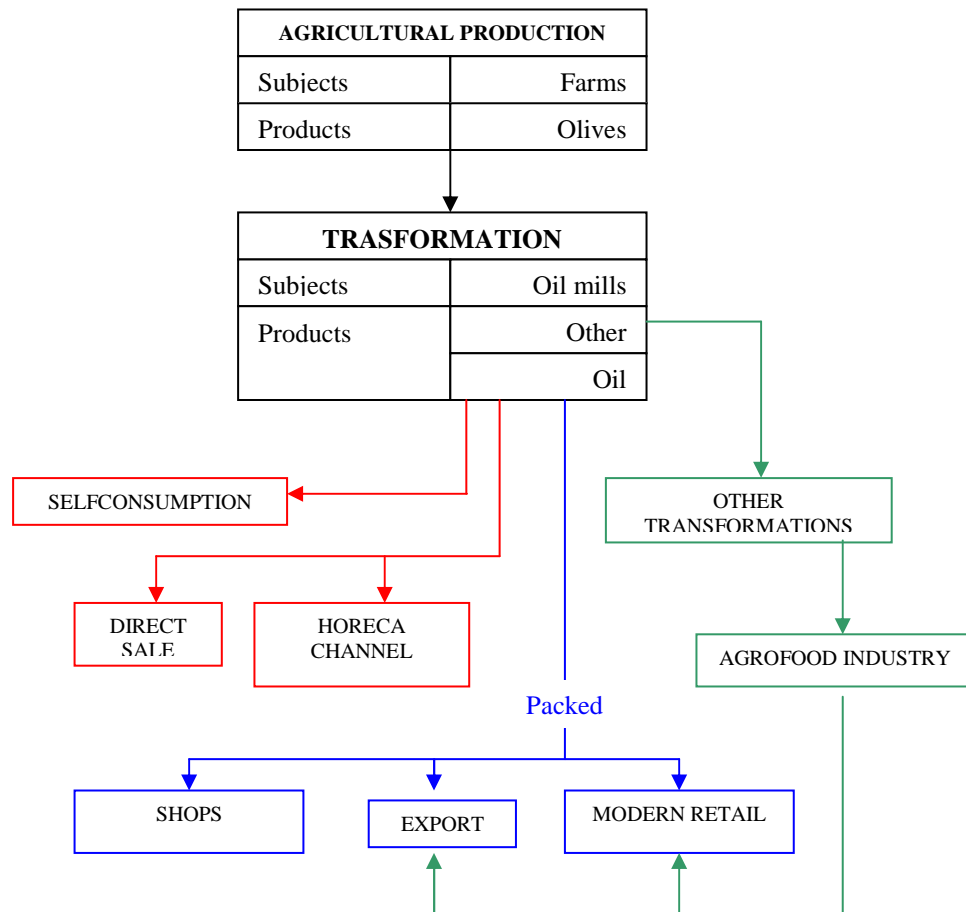


Fig. 3 Olive oil chain.

The number of oil mills ranges between 600 and 700, but most of them are family business. Packer firms, that often are also oil mills, are 370.

Extravirgin oil production is about 48,000 t, whose 60%, loose, is addressed to selfconsumption, direct sale and horeca channel.

Oil mills handle about 13,000 t oil, whose 10% is set up for direct sale, 40% exported, about 50% addressed to retail and mainly to traditional retail. Modern retail channel is generally limited.

A part of production is addressed to other kind of transformation, normally in other regions or abroad, to obtain less qualitative oils, used in food industry. About 100,000 t olive residues reach food industry.

Origin labelled oils are a small but important part of this chain process. The sold amounts of these products result lower than the potential but they have higher prices, due to firms marketing mix strategies.

2.1.1 Sicilian Protected Designation of Origin (PDO) olive oils

As shown in fig. 4, the actual production areas of Sicilian Protected Designation of Origin (PDO) olive oils cover a large part of the region. If we add those oils, that are under registration (Colline Ennesi and Colli Nisseni), we see that almost the whole region constitutes a wide quality oil production area.



Fig. 4 Production areas of Sicilian Protected Designation of Origin (PDO) olive oils

The total production in 2005 was about 526 t, but it doesn't include PDO Valdemone production. Estimated production with Valdemone, Colline Ennes and Colli Nisseni oils could reach 800 t/year. As shown in tab. 4 production has increased in almost all PDO except for Val di Mazara. The average increase is more than 15% and this trend is expected to go on in the next years, only if subjects, that work in the olive oil chain (producers, mills, packers), carry into effect production and marketing strategy.

Certified olive producers are 561 and nearly half of them are in Val di Mazara PDO; oil mills are 61 and packers, most of whom are also mills, are 59.

The wider and more productive PDO is Val di Mazara, the oldest one in the Region, with more than 1,800 ha area and a 188 t oil production. Productions of Valli Trapanesi and Monti Iblei are also remarkable, whereas the other PDO are smaller. In particular Valle del Belice produces less than 9 t oil, but it depends mainly on the strong specialization of this area in table olive production.

Tab. 3 Productive feature of Sicilian Protected Designation of Origin (PDO) olive oils, 2005. Source: direct survey.

| | Producers | Oil Mills | Packers | Oil (kg) | Surface (ha) |
|------------------|------------|-----------|-----------|----------------|----------------|
| Monte Etna | 23 | 6 | 5 | 36,744 | 104.33 |
| Monti Iblei | 74 | 14 | 23 | 130,477 | 884.83 |
| Valle del Belice | 24 | 8 | 5 | 8,959 | 273.54 |
| Valli Trapanesi | 163 | 6 | 6 | 162,114 | 1,267.56 |
| Val di Mazara | 277 | 27 | 20 | 188,156 | 1,864.97 |
| Totale | 561 | 61 | 59 | 526,450 | 4395.24 |

PDO Monti Iblei distinguishes itself for high value products and the specification provides indication of geographical sub-areas ("Monte Lauro", "Val d'Anapo", "Val Tellaro", Frigintini", "Gulfi", "Valle dell'Irminio", "Calatino", "Trigona-Pancali") where olive varieties and their blend are different. Sub-areas indication could create misunderstanding in the product communication.

According to the results of direct survey, prices fluctuate significantly in relation with the package (1 lt bottle, 4-6 lts tin, etc.) and the origin area.

Tab. 4 Trends in production and areas (2004-2005). . Source: direct survey.

| | Oil (kg) | Surface (ha) |
|------------------|-----------------|--------------|
| Monte Etna | 1013.46% | 114.94% |
| Monti Iblei | 22.68% | -19.07% |
| Valle del Belice | 172.39% | -6.65% |
| Valli Trapanesi | -- ¹ | -8.75% |
| Val di Mazara | -7.68% | 26.70% |

Whereas Databank² classifies PDO olive oil in entry of maturity stage, actually Sicilian PDO oils are in explorative stage or in the phase of entry in the market.

¹ Datum about 2004 production not present

The points of strength and weakness of Sicilian PDO oils are summed up in tab. 5.

Tab. 5 Strength-weakness analysis

| strength | Weakness |
|--|--|
| Specific organoleptic features | Inadequate productive technology <ul style="list-style-type: none"> ▪ productive system ▪ logistic organisation ▪ raw material flows ▪ storage |
| Low produced volumes, optimum for niche strategy | No chain management |
| Low number of oil mills, optimum for market | The rate of loose oil is lower than for normal extravirgin oil but still exists and is a danger for the high quality image of such oils |
| Good penetration in USA market | |

3. Strategic analysis of extra virgin oil market

To propose a strategy aimed to improve Sicilian typical oil market, it is needed to analyse demand and supply, chances and threats (fig. 5).

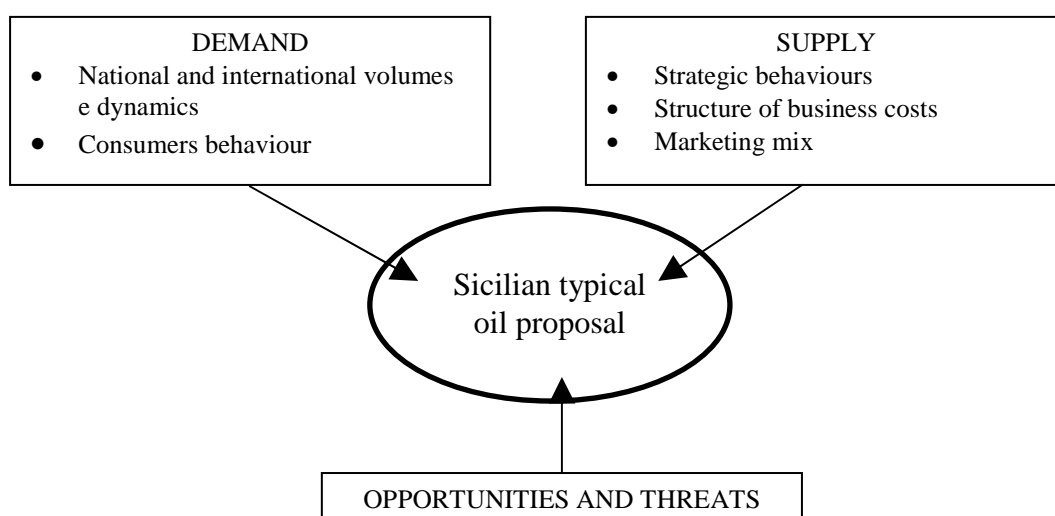


Fig. 5 Strategic analysis of extra virgin oil market

² Dtabank, last report about olive oil (July 2005)

3.1 Demand Analysis

Referring to packed product market, it is the most important for sold volumes and the most interesting for this analysis and is progressively increasing. In fact the extra virgin oil rate of sales exceeds 75% in the retail channel (modern retail and traditional retail) and 35% in the catering channel (restoration, hotel, etc.). The retail channel concerns more than 70% of packed oil market.

In the last years, the consumers behaviour reduced the replaceability of olive oil with seed oil (the first used raw as condiment the second in cooking) so there are no more consumption fluctuation related to price dynamics.

A replaceability of packaging manners can be observed a: in fact, especially in Southern Italy, a wide rate of consumers uses loose oil (50% of them are producers).

Referring to packed oil, in 2004 home consumption has increased 6% in value and 2% in volume. Quality oils, which represent 12% of purchase in retail channel, have a more significantly increased. The “100% Italian”, which covers 8% rate, has increased 20% in volume. PDO and organic, which cover 2% rate, have increased 16% and 17% in volume respectively. Foreign consumption is positively improving (+ 5% in volume and + 15% in value in 2004, + 10% in volume and + 19% in value in 2005) in markets with good penetration (Germany, Australia, Swiss, Spain and in particular in the USA where it represents the first market with a 30% of foreign sale).

Italian oils are leader in USA market (more than 70% of total sale) and in German market (85%), but Spanish competition is increasing (from 15% to 20% of USA market share).

Italian consumer behaviour is conditioned by organoleptic feature such as flavour, fragrance, colour, clearness.

3.2 Supply analysis

Supply analysis shows a substantial strategic diversification between big and medium-small firms.

Tab. 6 schematizes the most important differences.

Tab. 6 Main differences in strategic behaviour between big and medium-small firms

| Firm size | Strategy | Target |
|----------------------------------|---|--|
| Big firms ³ | important brand policy | <ul style="list-style-type: none"> ▪ increase of entry barrier ▪ “first price” products ▪ trade marks |
| | brand and product diversification | <ul style="list-style-type: none"> ▪ intrinsic feature (flavour) ▪ packaging ▪ communication |
| | modern retail services | <ul style="list-style-type: none"> ▪ logistic chain (delivery quickness and efficiency) ▪ sale point service |
| | considerable aggressiveness in price policy | <ul style="list-style-type: none"> ▪ availability to promotional actions ▪ favourable payment condition |
| Medium-small firms | production costs control | <ul style="list-style-type: none"> ▪ craftsmanlike and discontinuous process ▪ e.g. seasonal work contracts |
| | Trade and sale costs reduction | <ul style="list-style-type: none"> ▪ narrow advertising policy ▪ limited retail costs thanks to capillarity, direct relation with costumers ▪ knowledge of seasonal sale behaviours |
| | in-depth knowledge of local taste | <ul style="list-style-type: none"> ▪ high geographic variability |
| | specific price policy | <ul style="list-style-type: none"> ▪ really competitive prices ▪ niche price policy |
| Modern retail firms ⁴ | limited product diversification | |
| | satisfaction of lower level consumer | |

Analysing the relationship between cost trend and supply behaviour, the oil cost, as raw material, which influences turnover about of 70%, is progressively increasing (4-6% average per year).The

³ Firms with 100 millions € turnover like: Carapelli, Salov, Carli, Monini, Unilever (Bertolli, Dante), Olii Italia, Farchioni, De Santis

⁴ Coop Italia, Despar, Esselunga, GS, etc.

price raised from 2.60 euro/lt in 2000 to 3 euro/lt in 2004. The only way to make up for margin of profitability, which is decreasing, is product diversification.

Raw material comes from other Mediterranean countries (Spain, Greece, Tunisia) for a rate of almost 50%. This datum is liable to productive fluctuation, as crops are not rational and not watered and olive trees are often old.

Referring to packaging, the diversification between catering and retail channel is considerable.

In the first channel the most common package is 1 litre glass bottle while 0.75 litre glass bottle is used only for 10% sales (niche products) and the 3-5 litres tin is less common.

In the catering channel, common olive oil covers 55% used volumes and normally the most common package is the 3-6 litres tin. 0.6-1 litre glass bottle are employed only to wait on customers. Finally, medium-small firms still use the 3-6 litres tin package, which are associated to the idea of tradition and health.

Consumption price dynamics of extravirgin oil is described as follows:

| Band | Description | Price €/lt |
|-------------|-----------------------------------|-------------------|
| 1 | Low level products | < 4 |
| 2 | Common extravirgin | 4-6 |
| 3 | PDO / PGI / Italian100% / organic | 6-8 |
| 4 | Niche products | > 8 |

With regard to retail, except the relationship with modern retail, direct sale nets are still the most common retail system, in particular with multifirm agents and area chiefs. Some big firms are reorganizing and strengthening their retail system through agencies, stores and concessionaires. Some other important firms (Carli and Vezza) employs direct sale, door to door or mail order selling. Export oriented firms have created foreign retail societies.

Modern retail firms sale limited volumes of private labelled oil (15% packaged production).

Wholesale sector is still one of the most used channel especially by traditional retail and restoration and catering.

The investment addressed to consumer marketing are only about 37 millions euro⁵ (2004) and the newspapers are the popular channel with a double investment in comparison with television medium. In the last years, the on-line presence has largely increased but on-line sale is still limited and it can be considered common only for typical products dealers, oriented to foreign commerce.

3.3. Opportunities and threats

The main chance is the possibility to improve harvest and pruning efficiency through adequate investments, oriented to mechanization. It allows huge scale economy, a decrease of production costs and enhances the level of quality. This scenario would not happen in a short period, as mechanization is associated to plant renovation. Another important chance is a better consumers consciousness and knowledge about quality of Sicilian PDO oils. Pursuing this aim in the short period is a concrete and interesting possibility.

Price fluctuation, due to frequent sale promotion, is one of the main threats, as it can cause in the consumers behaviour perplexity, gambling behaviour, less willingness to value quality-price ratio, in the supply price lowering strategies.

The second threat is foreign competition. In fact average penetration of Spanish, Greek and other Mediterranean countries oils is rapidly increasing in many markets.

4. Proposals to improve Sicilian PDO oil chain

The following proposals are classified according to chain subjects and the interested marketing mix steps. Sicilian Region support can be either direct on product, communication and retail or indirect to support the marketing oriented firms.

Referring to olive producers (farms), the Region should support a) an efficient harvest techniques and b) a products management from field to oil mill. Both of them are not particularly onerous and are aimed to obtain a better product (olive) associated to a better quality of oil.

⁵ Source: AC Nielsen

Transformer farms and oil mills, referring to the product, should take the following actions:

- a) create a quality control system,
- b) project new coherent packaging, according to the served band of market (e.g. multiple packaging to substitute 3-5-6 liters tin, glass bottles especial for catering).

With regard to communication, they should strengthen on-line presence, appreciated by foreign customers.

Finally referring to retail, these firms should develop direct retail (direct sale point, farm market) and the relationship with catering channel (restaurants and hotels) not only as a retail channel but also as a medium to spread the knowledge of the product among potential customers. The last proposal is to rely upon external transport system, minimizing firm handling, to lighten firm and to optimize product flow.

The proposals about transformer farms and oil mills are also valid for factories and packers with regard to product policy and transport logistic. On the other hand, as regards to communication, they should improve direct marketing to build and to strengthen the relationship with customers through greengrocers in urban centres.

About retail strategies, they should push foreign sale through speciality shops and not modern retail. The most interesting markets are: USA, Canada, Germany and China, in consideration with the enormous potential of customers of this country.

In the Italian market, they should develop a multifirm agents net.

Sicilian Region should support product through financial supports, chain agreement and an especial support to protection consortia which have to coordinate members and to propose marketing enterprises.

Referring to communication, the Region should develop a regional land marketing to support a “umbrella label”, able to promote all Sicilian PDO oil in particular in the global market.

Finally, Region should coordinate all the actions aimed to retail improvement, essential to avoid “sovrapposizione” of different local actions.

Tab. 7 Proposals of action

| SUBJECTS | Marketing mix | | |
|------------------------|--|----------------------|---|
| | Product | Communication | Retail |
| Farms | Raw material handling Harvest mechanization | | |
| Oil mills | Quality control Packaging | On-line presence | Direct sales Catering Restoration Turism Transport tertialization |
| Oil firms and retailer | Packaging | Direct marketing | Foreign channel Agents net Transport tertialization |
| PUBLIC BODIE | | | |
| Regione Sicilia | Chain agreement Protection consortia | Regional label | Farm market |

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