



Case study
Culatello di Zibello
PDO



Parma Unit
Parma, 23th September, 2002
-WP5 Meeting-

1. General information

- **Name of OLP:** *Culatello di Zibello (CdZ)*
- **Type of product :** a particular kind of ham
- **Type of denomination:** labelled with PDO, obtained only in 1996
- **Country of origin:** Italy- Emilia Romagna
- **Area of production:** it's produced in the north part of the Province of Parma, in particular in the towns of: *Polesine, Busseto, Zibello, Soragna, Roccabianca, San Secondo, Sissa e Colorno.*
- **Processing:** There are two kinds of Culatello:
 - ✍ *Culatello di Zibello PDO (CdZ):* it's made according to the rules of the Code of Practice registered as stated by Reg. EEC 2081/92
 - ✍ *Generic Culatello:* a generic product without PDO mark and is not ruled by Code of Practice.

2. Definition, characteristic and legal protection (ex- WP1)

2.1 Code of practice

- *Traditional process, ("a caldo")* is done immediately after the slaughtering, between November and February, to exploit a certain weather conditions of the area of the production
- The *industrial process, ("a freddo")*, can be done after few hours from the slaughtering, even in summer time, using refrigerators.
- Differentiation respect other products competitors (price, ingredients...):
 - ✍ *The "generic" Culatello* is not subjected to the checking controls of the Code of Practice and is commercialised at an average price of 20-25 Euros / kg instead of 45 Euros Kg of Culatello PDO.
 - ✍ *CdZ PDO* producers jointed in a Consortium, have defined a series of productive rules, more restricted respect those of the Code of Practice, in order to identify and differentiate their products as of an higher quality (for ex. CdZ PDO by Consortium can be obtained only form pork slaughtered, according to the tradition during winter time and must not to be used additives).
- The only Certification Body is "Istituto Parma Qualità"

2.2 Legislative aspects

Laws institute and regulate the denomination of products

- Reg.(EEC) 2081/92 and 2082/92
- Reg.(EEC) 1263/96 conferring PDO mark to Culatello di Zibello

Legal institutions and bodies involved in definition, protection and monitoring quality

- D.Lgs 30.12.1992 n.537 (Charter IV) attributes to *official veterinary doctor* the faculty of inspecting by checking that the meat based products correspond to production criteria stated by the producer and that the composition correspond to the labelling.
- D.Lgs 30.12.1992 n.537 (Charter V) attributes the checking of the Commercial Designation to the *Ministero delle Risorse Agricole, Alimentari e Forestali*.

The existence of a Trademark, Collective Brand, other indications

- The designation of the Denomination of Protected Origin "*Culatello di Zibello*" must be done in clear and indelible characters, distinguished from any others inscriptions on the label and immediately followed by the mention "*Denominazione di Origine Controllata*". This inscription can be combined with the denomination mark.
- It's forbidden any other specification, not foreseen.
- Producers of "Culatello di Zibello PDO", jointed in the Consortium, combine the mark of Culatello PDO with the Collective Brand of the Consortium.

Consortium mark



3. Link with production and marketing system (ex-WP2)

3.1 Production chain aspects

The structure of the supply chain of the pork meat is composed by some actors:

- The breeding firms
- The slaughterhouses, sectioning and industrial meat processing
- The distributions

Pork breeding supplies the raw materials to the slaughterhouses. The production uses the meat originated from the only two regions, proving the small dimensions of the producing system, can't face to the needs of the entire sector of processing meat, unless the production is of a niche product.

The slaughterhouses activity is characterised by the lowest added value. It consists in pork purchase, sectioning and selling, as a process of services rogation and not of foodstuffs production.

The distributions depend on firm's strategies. Most of the producers of the Consortia sell their product directly in the area of production because half of them are restaurant too, other sell directly in specialised high quality shop, at the retail level. One of them sell his product by internet but only a few firms sell them by the GD and GDO. One big producer of cured pork sells CdZ with the name of the company that has high reputation with the consumers.

3.2 Consortia and interprofessional bodies

- **Association of breeders**: *Consorzio Suino Pesante* (it collects breeders of the province of Pianura Padana, constituted on a specific Code of Practice concerning the kind of nourishment of the animals, and the minimum age of selling) and *Associazione Nazionale Suini*
- **Association of industrial slaughter**: *ASSICA* (powerful association representing a bottle neck of the chain)
- **Certification Body**: *Istituto Parma Qualità* does the product certification.
- **Association of PDO Culatello producers**: *Culatello di Zibello Consortium*
 - 13 firms, mostly restaurants or small firms producing in artisan way and selling their products in local areas or in a very specialised food shop as "delicatessen".
 - It has a Collective brand
 - Don't apply limitation on quantity and don't have a common strategy for sell their products
 - They don't have a common base-price to sell at the retail level.
 - It has a small value, respect the total sector, in number of piece (18.000) and a high value (3.6 million of Euro) but is relevant for the local economy.

The Consortium is in contrast with the strategy of the ASSICA because the small producers try to defend their market position using quality strategy with high price (instead of big producers that, thank to scale economics, try to increase the production of Culatello DOP reducing the quality).

3.3 Link with local production system

Characteristics of the typical meat based productions:

- A certain degree of fragmentation, confirming the artisan nature of many industries of the sector.
- Presence of a system of integration relationships with all the actors of the meat supply chain, in order to develop strategies bringing about efficiency improvement and the competitiveness, of the entire sector.
- The relationships between the firms participating are characterised by a strong competitiveness, moving all the operators towards solution more efficient and at the same time based on co-operative principles and of mutual confidence, determined by a sense of belonging to the territory very rooted.
- Role of preservation of human resources.

Other connected activities:

- The birth of specialised firms in building and supplying plants in processing meats, some of them leader in their own market.
- Development of the loan sector with the development of financial products specific for the cured pork firms
- Improvement of the tourist sector, with the progressive establishment of eno-gastronomic tourism.

4. Link with rural development (ex-WP3)

4.1 Area of production

Characteristic of the region and relevance of the product for the area

- Parma province, famous for other OLPs and the culture of “good food”, considered as a real wealthy region
- The reputation of the Culatello is very high and is considered the “best” cured pork meats for two aspect:
 - its intrinsic quality level,
 - its very artisan production process.

4.2 Rural development tools

- Implementation of the agritourism and rural tourism circuit by means of the multifunctionality of some agricultural firms and the conversion of some rural activities introducing other activities more specialised.
- *La Strada del Culatello di Zibello (Culatello di Zibello Route)* is one of the “*Itinerari Enogastronomici of Emilia-Romagna*”, that cover the territory from Piacenza to Rimini, aiming at the harmonic development of the rural areas, by means of:
 - the valorisation of the gastronomic resources of the territory
 - the promotion of tourism actions with positive results on all the supply chain production of the typical products.

Legal base and actors involved

- The *Reg. 390/99* is aiming to valorise the eno-gastronomical resources of the area by means of the tourism of the Emilia Romagna with a parallel promotion of the territory and of the Labelled products (wines and agro-food productions).
- First step :a Regional Census of the eno-gastronomical supply
- Quality standards for certifying the participating firms and a Code for the local management groups (Comitati Locali di Gestione).
- The Provinces and the local Institutions (bodies)
- Regional Bodies (Assessorati) in collaboration with APT Services and with the consulence of a technical equip of experts.

•Problems and result of these actions

- Capacity and the willingness of the operators to interact with each other to create a real “network” able to valorise the whole production system within which the route is located.
- Activities aiming to create strong co-ordination among the project partners, increase the level of quality of the services offered and the reputation of all the players involved. The public, private and intermediate institutions must work towards making every single subject indispensable and at the same time complementary, with roles which do not overlap but which are closely linked to the others.
- High level professionalism in the management of the whole itinerary combined with the high quality of the food and wine products, the culture and the traditions of the territory.

5. Link with consumer and citizens (ex-WP4)

5.1 Marketing differentiation

- Consumer's perception is not very defined in relation to Culatello PDO and non PDO because they don't know the difference between the marks and in some cases they're not able to distinguish them.
- The protection of the consumer expectations, leads the adoption of a collective mark which implies necessarily, that its market promotion is done by Consortia.

5.2 Strategies

- PDO Culatello di Zibello is sold at the desk of delicatessen and not at the free service. Some of producer sell their products on the web with their mark, but the price is three time the market price.
- The most relevant action used of support the image of the product is the "Strada del Culatello di Zibello" and all the country fairs. By means of these action the products can be known and the consumers can be awakened about this.

The two main strategies :

1. A strong differentiation strategy, producing a product of high quality and sold inside the restaurant.
2. Strategy of a big firm outside the Consortium, that produces Culatello di Zibello PDO because wants to increase its production but the quality isn't so high.
3. Other firms are totally undifferentiated because they use passing (passaparola) and are characterised by a small production, very traditional and of high quality and high reputation.