

Wine terroir concept: some preceding in Arrigo Serpieri's agrarian zone

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Abstract

The paper aims at discussing the role played by the theory of business clusters in wine marketing and in particular it aims at discussing the “terroir” definition in wine economics in order to find some preceding roots within the Italian Arrigo Serpieri's thought, often considered a politician rather than a theory maker, but recently reconsidered and revalued (Becattini 2002) as a Master of research methodology. Wine terroir is quite a philosophical concept but it can give competitive advantages in wine marketing as it has the power to explain different prices of wines with similar organoleptic characteristics. After a brief discussion on literature about the concept of economic spatial analysis, the second section investigates the multiseptic shifts of the word “terroir”, focusing on the conspicuous idea that within any “terroir” are connected individuals involved in production, in social organization and in agricultural practices, all being oriented in valorising the area itself. The third section treats of some traditional explanations of spatial patterns of economy arguing that production is intrinsically a local fact and any production-site is an exclusive combination of natural and historical resources as well as cultural resources and social organization. The fourth section attempts to explain the Serpieri's theoretical viewpoint on the specificity of local development within an “agrarian zone” that can be considered as a general preceding of the “terroir” concept. The fifth section presents some theoretical application of special analysis on wine sector as updated wine marketing uses “terroir” as a differentiation tool aiming at dominating high-end and luxury goods market segments, facing competition of branded wines that have less cost and geographical restraints.

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1 Introduction

In wine marketing, finding a point of differentiation is essential, and the concept of terroir may offer a strong possibility, as wines of similar organoleptic characteristics show price differentials depending on region of origin (Vaudour 2002, Ditter 2005).

In his well known article Michael Porter (1998) pointed out as the business clusters are a special aspect of the new economics of competition, reflecting on the role of location. The word 'cluster' may have several connotations, and Porter used a precise definition as "geographic concentrations of interconnected companies and institutions in a particular field" (Porter 1998). He emphasized two characteristics that set clusters apart from industries or supply chains: (i) the firms and organizations pertaining to a cluster usually belong to different industries related to each other, and (ii) clusters may embrace downstream sales channels, suppliers of diverse complementary products and services, as well as government agencies and non-profit organizations, all useful for the core firms of the cluster. In his article Porter tells about the California wine cluster and the Italian leather cluster as good examples.

The interest in Porter's cluster arises in many disciplines and his ideas spread in many areas of research, but – curiously – very less in agriculture general economics, rather in wine specialized literature (Mueller and Summer 2006).

As cluster pertains to location, immediately the discussion on spatial organization both in agriculture and agribusiness and, in a specific way in wine terroir, is necessary. With no doubt the concept of terroir claims territorial boundaries, but whilst demarcation systems operate within a legal framework, terroir has more a philosophical dimension even if supports the process of demarcation itself (Charters 2006).

This work aims at discussing terroir definition and its role in wine marketing and first at finding some preceding roots within the specific agricultural economics literature and in particular in the Italian Arrigo Serpieri's agro-economic thought. The Italian agricultural economist Arrigo Serpieri, dead in 1960, was with no doubt the first establisher of agricultural economics as a separate academic discipline. His thought has been soundly considered by many followers, but mainly in a political and practical sense within the specific discipline and less as a source for theoretical thinking both for agricultural general economics and for economics *tout court*. So that his incisive attention on local and social causes of development and on the theoretical significance of territorial zoning have been reconsidered only in recent years by scholars interested in studying the Italian industrial districts (Becattini 2002) rather than by Italian agricultural economists. This is further confirmed by the attention paid to the terroir concept by wine economists than by agricultural economists. The hope is that to give some ideas on the scarce attention paid by agricultural economists to the concept during past time.

2 Terroir: a plural semantic word

The multi-semantic shifts of the word *terroir* have not been yet completely investigated, even though the concept is frequently used in defining and emphasizing the regionality and the typicality of agriculture products facing the present expanding globalization. The concept is important both for wine consumers, who are willing to discover the qualities of local products, and for wine producers who are involved in protected and geographical denominations.

As the the origin of the word *terroir* derivates from Latin *territorium*, it is easy to understand its physical significations but it is important to determine a more modern definition of terroir, indicating what french agronomists (Deffontaines 2005) have yet defined as:

(i) the best matching geographical area between the soil capacity and the material to be planted, indicating also a specific landscape where the planted material has a homogeneous agronomical response;

(ii) the specificity of an area in valorising the agriculture as an all, fostering the interest of local development and involving natural environment and techniques used to establish the local know-how and the history of the socio-economic organisation of the area;

(iii) a territorial framework of socio-economic development in a rural area.

It is necessary to emphasize that all these factors attempt to obtain the best definition of the terroir concept that has been studied by several disciplines. Nevertheless, in viticulture, the terroir concept has progressively integrated all the significations, the agronomic, social and cultural dimensions of a wine area and nowadays the term can comprehends different subconcepts related to:

1. the soil, as matter-terroir;
2. the land, as space-terroir;
3. the culture, as know how-terroir;
4. a slogan, as communicated identity-terroir.

None above mentioned aspect is negligible as each one is an integrated part of terroir definition, as well as each one has a common point in the origin, specificity and typicality of a product. In a very decisive way, they all embody the theoretical impossibility to reproduce the specific product in a different area. In any case, the role of consumer's perception is fundamental, as an area may become or re-become traditional if it is enduringly supported by consumers commitment. That is to say that if an area is perceived as a terroir for many years, any product of that area will be considered a traditional product.

It is conspicuous that with terroir are connected individuals involved in production, in social organization and, not as a last thing, in agricultural practices.

All individual components are involved in a dynamic interaction, so that terroir is to be viewed as an area that residents consider a “project”, aiming at valorising the area itself through a particular type of production and using natural and cultural resources (Deffontaines 2005). An important consequence is that the entire area is then configured as the subject of a developing project and the land becomes a terroir by the valorisation of agricultural production.

Anyway, in discussing about terroir it is easy to find some misunderstanding, probably originated by different disciplines approaches. Some authors (Costantini 2006) recently stated that the functional parts of the territory, or rather the *terroirs*, are the main features of an area suited for typical food productions. In this sense the terroir should be defined as a subsystem of an area and as such as an agroecosystem, whose natural characteristics – soil, subsoil, slope and climate – constitute an unique system of factors, that by means of plants and animals, confers specific characteristics to the productions. The man adapted production techniques to natural conditions in order to exalt quality results in food productions and fostering peculiarity and specificity. Thus, the terroir is a well defined zone, with variable dimension with respect to natural conditions, types of cultivations and economic dimension of production. In Italy, says the author, the dimension is in the order of as about ten hectares (Costantini 2006).

In defining a terroir, the cultural resources are fundamental, so that the dimension of ten hectares appears to be quite not acceptable, unless we consider that cultural resources could change within any ten hectares and that the ‘terroir concept’ is near related to a vineyard or to a *cru* dimension. On the contrary, in individuating terroir, the most favourable endowment of territories is not dimension but their identity, which is characterized by the whole of natural (soil and climate) and cultural (historical and social) resources. In this sense, producers themselves are part of terroir.

Apart from any discussion on variable significances of terroir, the meaning of the terroir concept is now acquired with stability, as the french definition has been adopted by UNESCO:

“Terroirs constitute a responsible alliance of man and his territory encompassed by know-how: production, culture, landscape and heritage. By this token, they are the fount of great human biological and cultural diversity. Terroirs are expressed by products, typicality, originality and the recognition associated with them. They create value and richness. A terroir is a living and innovative space, where groups of people draw on their heritage to construct viable and sustainable development. Terroirs contribute to the response to consumer expectations in terms of diversity, authenticity, nutritional culture and balance and health” (Unesco 2005).

This brief discussion has been carried out with the aim at individuating a land zoning method, not only considering (or over evaluating) the agronomic conditions of soils. This involves the discussion on spatial organization and local development, and on their theoretical framework.

3 Economic spatial organization and bases of local development

The literature on the economic spatial organization is huge and any attempt to summarize is useless, but in discussing the concept of *terroir* it is useful to remind some traditional explanations of spatial patterns of economy about persistent clustering of firms and carry out some consideration on local development.

The environment within which any firm operates has been denominated in very diverse ways by researchers: industrial districts (Becattini 1989), network regions (Camagni 1991), regional innovation milieux (Maillat 1992), regional innovation systems (Morgan 1997), clusters (Porter 1998) all referring on spatial economics patterns. On this, for the aim of this paper, the main concepts we will consider are (i) localized industries, (ii) agglomeration, (iii) industrial complexes, (iv) regional milieu and social network regions.

Agglomeration economics roots in Alfred Marshall work as he, in chapter X of “Principles” focused attention on “The concentration of specialized industries in particular localities”. Marshall defines any industry that is concentrated in certain localities a *localised industry*: “Many various causes have led to the localization of industries; but the chief causes have been physical conditions; such as the character of the climate and the soil, the existence of mines and quarries in the neighbourhood, or within easy access by land or water. [...] Another chief cause has been the patronage of a court. The rich fold there assembled make a demand for goods of specially high quality, and this attracts skilled workmen from a distance, and educates those on the spot.” (Marshall 1920).

Here, Marshall focuses on knowledge, tacit knowledge and knowledge spillovers, being these latter easier within close firms rather than in remote ones. The infection mechanism of knowledge transmission may be labour mobility, face-to-face contacts, observation of the practices of other firms. In particular, specific knowledge spillovers also arise because firms learn about the characteristics of their location, and that knowledge spills over to other firms, as in the “self-discovery” described by Hausmann and Rodrick (2003). All of these knowledge spillover effects are summarized in Alfred Marshall’s phrase: “When an industry has thus chosen a locality for itself, it is likely to stay there long: so great are the advantages which people following the same skilled trade get from near neighbourhood to one another. The mysteries of the trade become no mysteries; but are as it were in the air, and children learn many of them unconsciously. Good work is rightly appreciated, inventions and improvements in machinery, in processes and the general organization of the business have their merits promptly discussed: if one man starts a new idea, it is taken up by others and combined with suggestions of their own; and thus it becomes the source of further new ideas. And presently subsidiary trades grow up in the neighbourhood, supplying it with implements and materials, organizing its traffic, and in many ways conducing to the economy of its material.” (Marshall 1920).

The result is that many firms of the same industry located in the same site, can

easily benefit of a local pool of specialized labour; the local supply of non-traded goods (i.e physical or institutional infrastructures) is enforced, and in addition information flows better among firms gathered together in a limited location.

In industrial complex, firms maintain a stable trade relationships based on transport and transaction costs that actually govern decision on spatial location. Both agglomeration and industrial complex are open to entry, but agglomeration theory recognizes additional benefits, ignored by industrial complex economics. Any firm pertaining the agglomeration draws a larger pool of specialized inputs and can be easily flexible to demand changes. Economies of scale can be realized within cooperative investments, advertising, research and in localised industry, firms better know market conditions, innovative products and production processes spread quickly as information circulates in small space. All these facts contribute to build or enforce a *milieu*, a social network, profitable for a particular industry. As industry-complex and agglomeration models of clusters do not explicitly consider the mechanism by which information flows from one firm to another, social network theory attempts to add specificity to clusters.

The economic value of a network or a *milieu* lays on innovation capacity (*innovation network, milieu innovateur*) first originating for geographical proximity, that causes costs reduction in production, transactions and information acquisition from local environment. Close firms and workers can imitate and spread organisational models, managing decision routines, commercial strategies and innovative behaviours. During time, firms are induced to a continuous reciprocal coordination and control, also regarding asset innovation control which potentially generates a specialized pool of local skills.

Geographical proximity increases the probability of producing a socio-cultural proximity, constituted by shared behavioural models, social trust, common languages, common cognitive and moral codes. Geographical proximity joined to socio-cultural proximity determines high probability of interactions among economic agents, informal and trusted agreements, punishment and subsequent lacks of opportunistic behaviours, labour division and cooperation. The milieu then builds and accumulates a relational capital based on social cohesion, sense of belonging, identification and membership (Camagni 1991).

Following the Marshallian roots, italian scholars carried out a particular theoretical reflection on local development, based on the study of industrial districts. In Becattini's thought, a specific conception of local development, to be intended as a socio-economic change, has clearly been defined, stating that social and economic changes are organically detectable in the variable shapes of territory. Localities, and selected sets of sites, are actually well localised spaces but, in the same time, living, towing elements as well as the result of reality transformation.

In the world complexity, within any kind of connected system, usually named *local system*, many productive (firms) and reproductive (families) institutions interact and make reciprocal adaptations (Musotti 2002). In this interacting, the

original development forces do change their shape and continuously self renew. Thus, in territories, the effects of development extend and deposit collective consciousness by means of psychological and cultural elaborations (Musotti 2002). The need to understand such a continuous interlocking of actions and feedbacks suggests to adopt the local systems as the minimum survey units for the social and economic research (Becattini and Rullani 1997).

The development itself stems largely from the combination of different individual local systems growth. If the local systems in turn stem from the interacting and the feedback of original local forces in a continuous circuit that creates new forces of development, then, the definition of a valid theory of local development could be the reconstruction of the socio-economic change in its local pattern and in the basic unit; this pattern being embodied by the evolving mechanisms and processes of transformation of local systems (Becattini and Rullani 1997).

By following these results of italian scholars analysis, we can consider some fundamental points which are the bases of the definition of local development.

Production is intrinsically a local fact and any production-site is an exclusive combination of natural and historical resources as well as cultural resources and social organization. In fact, production is both the input-output transformation and the re-production of the social system, the technical know-how, the institution framework and the natural environment themselves. In a local system, face-to-face contacts enable a very high frequency circulation of ideas, a spontaneous way to produce those ideas and innovative ways of solving problems by means of oral, visual, and body languages. Face-to-face communication is also valid for building and spreading trust, by observing the body language and many other characteristics of one's interlocutor. By breaking down anonymity, face-to-face contact enables networks of the most productive workers to develop and promotes partnerships and joint projects among workers and between workers and entrepreneurs. All these facts are productivity enhancing as clusters of producers do specialise in selected and market-oriented productions, rather in segment or niche-markets, in which the local system dominates soundly the relationship between local resources and final market. As a consequence, a well functioning local system manages the supply chain connected to an identifying image and eventually to a brand. The circuit of knowledge in local networks fertilises the relationship between local identity, local specificity and the ineffable dimension of globality (Venables 2006).

From our viewpoint, this theoretical discussion precedes an acceptable definition of terroir, and subsequently of wine-terroir, not only emphasizing the above mentioned part (know how-terroir) terroir definition but considering the real and essential definition of the concept and its use in marketing.

4 Arrigo Serpieri's agrarian zone

The summary exposition of the Italian scholars' ideas on local development is collimating together with the interpretation of agricultural and more in general for rural areas' phenomena (Becattini and Omodei Zorini 2002). Furthermore, in the primary sector the district approach is particularly interesting as local roots of production have an undoubtable correspondence with natural environment. But, it may be more interesting to investigate on some other evident correspondences between the Italian district thought and the Serpieri's definition of "zona agraria", here translated as agrarian zone. Arrigo Serpieri defines "zona agraria" (1929) the territorial unit within which the territorial production is almost homogeneous and to be studied in an unitarian way. This precedes and strictly collimates to the above mentioned need to adopt the local systems as the *minimum survey units* for the social and economic research in order to well understand the continuous interlocking of actions and feedbacks (Becattini e Rullani 1997).

Within the agrarian zone Serpieri distinguished two sub-systems in reciprocal connection:

1. land tenure;
2. production regime, to which the firms tend to converge (ordinary production system).

Under (ii) Serpieri rationally orders all the agronomical elements, yet using an economic viewpoint, but under (i) his thought reaches an important summit, enlightening a clear intent of economic policy. The line-thought preceding Serpieri's work stems from non agronomic experts, but from Italian political thinkers as Carlo Cattaneo, Stefano Jacini, Giovanni Lorenzoni and Ghino Valenti (Gioia and Spalletti 2005). These political thinkers conceived the institutional features of agriculture and viewed agriculture itself as a sum of distinct and well identified territories, each one based on typical social rules.

In Serpieri's theoretical viewpoint, the land tenure is the result of a conscious and sound transformation of the natural environment operated by the resident populations. As land serves as the seat of agricultural, pastoral and forestal production, but also is the seat of any other human activity and the land transformation, that produces a specific land tenure, has non purely agricultural production aims, but also other production and civilisation ones aims (Serpieri 1929). This transformation occurs through centuries, adding on the natural features of land a very complex summation of structures, infrastructures, civil rather than productive institutions. For the Author land tenure derives from the original features of land (including specific climate), the appropriation, division and inheritance modes as practised by populations and forms the secular lasting land transformation works.

Definitively, in Serpieri's thought, the territorial susceptibility depends both on natural and social resources and this idea is particularly interesting as he included

for the first time and in a very peculiar way the territory in agrarian studies. His theoretical landscape is still agro-centric, but sites are not more natural substrates for producing and housing, that strictly determine the production regime of farms, but a coherent and consistent combination between natural resources and social groups. His thought does not precede Marshall's ideas, but his theoretical elaboration is quite original as he first introduces explicitly defined 'non-market' choices instead of 'non-economic' choices in entrepreneur's behaviour. Serpieri recognizes that common entrepreneur's purposes are market oriented but: "Nevertheless, other purposes, that we can call non-market, can sum or substitute those ones [market purposes]: for these the entrepreneur gives up a higher monetary revenue in order to satisfy other desires or feeling" ... "so that *community*² as an all reaches a lower level of satisfaction of those needs which are expressed in monetary terms, but can obtain advantages of diverse nature." (Serpieri 1946, p. 34-35) The Serpieri's attention on community non market aims seems quite original and interesting also in an updated viewpoint.

Becattini, contrarily to the neo-classical one, favours a socio-economic approach that insists on the socially built nature of markets and the existence of production coordination typical mechanisms in each district which are both of market and non-market nature, founded on reciprocal trust. Among these, family or community linkages of confidence and reciprocity. For this, an industrial district is both a social and economic space and a decision-regulation active community, permitting resources location, creation and allocation. Therefore, the local system is not a simple 'agglomeration' of enterprises but really a 'relational network' constructed at a regional level (Becattini 1987, 1998). Recently, Becattini (2002) recognized his cultural friendship and some debts with certain Italian agricultural economist, not for the common branch of interest, rather for the research method, as agricultural economists go continuously "dalle stelle alle stalle" – literally "from the stars to the stables" – learning during their field research the actual necessity to add something in the economist's toolbox. In this sense, Bandini (1959) – probably the most acute Serpieri's pupil – from the concept of agrarian zone derives that of agrarian system, redirecting the methodological attention toward all phenomena surrounding firm and putting it in a second level of analysis. The firm derives its structure and organization from the surrounding agrarian system (Musotti, 2002).

Mueller and Summer (2006) discussing on clusters of grapes and wines noted: "Curiously, the concept [of cluster] has non spread very far in agriculture", and a simple answer could be the scarce attention paid by agricultural economists at the theoretical thought of Serpieri and his followers, rather considering him a politician or a Master of applied sciences – such as appraisal and agricultural economics – but really not an economic theory maker.

On the contrary, we attempt to affirm that in his "zona agraria" we can find some initial cue even for the correct definition of terroir, thinking that without a

²Emphasis of the writer.

correct definition we cannot have a useful economic and marketing tool.

After attempting to clarify terroir definition and its background, it is possible to delineate some brief ideas on the possibility of using terroir concept in wine marketing.

5 Brief on terroir and wine marketing

The main goal of many company marketing strategies in the last 20 years has been building the customer's commitment to a brand or a supplier. In practical business, these strategies assumed three forms:

1. creating customer satisfaction, by mean of delivering superior quality products and services (Gale and Chapman 1994);
2. building brand equity, or the sum of the intangible assets of a brand: name awareness, perceived quality, brand loyalty, the associations consumers have towards the brand, trademarks, packaging, and marketing channel presence (Aaker 1991);
3. creating and maintaining relationships (Peppers and Rogers 1993).

Success of singular or combined strategies may produce increasing levels of repeat purchase, disjunction from price increases and improved responsiveness to marketing communications by customers. The "quality movement" placed customer satisfaction as the ultimate goal of marketing programs but, as many satisfied customers are likely to defect to other brands or sellers in any moment (Sorce, 2002), strategists looked to creating a greater commitment with customers. Ways to achieve this were (i) to build brand equity and (ii) to build relationships, respectively for consumer products and for industrial products. Usually, brand equity used mass media advertising, corporate citizenship and public events sponsorship to build a brand image. On the opposite, relationship marketing sought to build interdependence between partners and relied on one-to-one communications, historically delivered through the sales force (Sorce 2002).

With the decrease of cost communication, owed to diffusion of electronic devices and the Internet, the ability to reach customers individually became a viable strategy for a wide range of firms (Pagani 1999), indeed including consumer products companies and in general for singular farms and vineries.

In the specific field of wine marketing, are to be resumed some simplified but realistic hypotheses: "In today's wine production, a distinction should be made between 'terroir wines' and 'branded wines'. Terroir wines are produced in a specified location which remains the same over the years . . . The volume of these wines cannot be increased, which can make some famous terroir wines very prone to speculative investment. Branded wines are produced by blending wine or grapes from larger areas and from a variety of sources, which may vary from year to year.

They owe their characteristics to oenological processes and blending. Their volume can be increased to meet demand.” (Leeuwen and Seguin, 2006 p. 3).

Terroir offers contemporary consumers the possibility to seek authenticity and exclusivity in drinking wine and the fact that were possible to conjunct quality and place and that wine making could not be exactly replicated elsewhere, may be essential for some or lots of consumers. This is interesting for terroir firms too, as in order to avoid branded wines concurrency, it is arguable that region of origin or terroir offers competitive advantage, though in a complex way, in marketing wine. If consumers are willing to have the interest and time to gain the kind of knowledge required to understand and separate terroirs, firms will have more room for competition. By purchasing terroir-wines the consumer buys quality joined to culture and readily accepts the higher costs of such terroir-associated quality products. Beyond the product’s typicality, other human, geographical and cultural factors encourage the consumer to purchase and increasing demand for terroir products is partly due to consumer’s desire of differentiation as opposed to standardisation.

In consuming a product with a terroir association, the consumer psychologically assimilates the representativity of the terroir whilst is evoking positive, albeit unquantifiable images associated with the terroir (Mollard, Pecqueur and Lacroix 1998). In this sense, terroir can be considered as a consumer’s cognitive system and in turn a cognitive model strictly connected to the image of the territory. Not accidentally, wine terroir are often tourism destinations whose reputation is based on perceived image by consumers (Kotler, Haider and Rein 1993).

“If advertising and brands are successful in persuading affluent consumers, who don’t know their wants, to drink less but better, they can claim to have some success in educating the consumer . . . Consumption of whisky or wine is not only a matter of quenching one’s thirst or satisfying one’s taste buds but also a sign a affluence and one’s status.” (Jones and Morgan 1994, p. 68).

The cultivation of aesthetic faculty requires time and application (Veblen, 1963) and the consumer has to spend his efforts in acquiring knowledge on wine, wine culture and geography. The possible future for european wines and wine makers consists in relationship between wealthy consumers and high quality vineries.

6 Conclusions

The terroir concept was born in the European designations of origin (AOC or DOC). From the half of Nineties to the Unesco declaration on 2005, many congresses and scientific discussions have been held. Nowadays, the acceptance and the continuing enrichment during time of the terroir concept is a strong signal of its social and economic significance.

Furthermore, terroir is a sustainable 'object' as clearly stated by UNESCO (2005) that aims at preventing human, cultural, social and natural values de-

cay and rather their support and development. By preserving terroir, sectoral policy will support local revenues, both for firms and workers, sustaining a self-perpetuating process not only in wine production but also producing externalities such as environmental, social and cultural goods which have non-market values.

The study of terroir may follow two different pathways. The first follows marketing disciplines targets and the second aims at finding economic explanations on local development and economics of agglomeration.

Updated wine marketing already uses terroir as a differentiation tool aiming at dominating high-end and luxury goods market segments, facing competition of branded wines that have less cost and geographical restraints. Using terroir as wine qualification, marketing has a potent tool for enhancing competitiveness of european (and italian) vineries facing the market globalization and the preference differentiation in consumer's behaviour.

The road has been already traced by french agronomists since many year, but italian economics scholars have a long and original tradition in local development theorization by means of studies on industrial districts, even if they payed less specific attention on agriculture and in particular on territorial specialisation in wine making.

Some underlined the curious lack of attention by agricultural economists on Porter's clusters and its practical and theoretical relevance in agricultural policy and in practice of marketing. This is quite actually true, but not by the real origin of the discipline. In fact, in the work of Arrigo Serpieri is possible to find specific preceding roots both of agglomeration and local tipicity of agricultures. For this, it would be useful some further deepening.

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