The Role of traditional products in the Valorisation of Marginal Rural Areas: 
the case of Iris Pallida

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Abstract
Nowadays the problem of valorization of marginal rural areas in Europe is significant. In Italy, 
despite the wide globalization that has developed in the agro-food system, some traditional 
agricultural crops with high added value may play an important role for the environmental 
preservation and social and economic development of some marginal rural areas.

The purpose of this paper is to analyse the problems and potential of developing traditional crops 
in marginal rural areas, through their valorization as typical products.

The paper presents a case study analysis on the Iris Pallida supply chain. Iris Pallida is a minor 
crop, whose rhizome is used by the international fragrances industry. The cultivation is limited to 
only two marginal subregions in Tuscany (a remote part of Chianti and Pratomagno) and it is 
usually complementary to the olive oil and wine production.

The field work carried out at local, national and international level has al lowed to describe in detail 
the local production system, the threats to its survival, and the opportunities of its valorization 
thanks to its connections to the global market and the high interest of the local stakeholders in 
supporting it for its high potential to revalorize and environmentally protect some rural areas that 
are now abandoned.

An increasing development of the cultivation could answer also to an increasing request of the 
rhizome from French fragrances industry, due to its outstanding quality attributes.

The paper addresses an important re-emerging issue: “glocality” as a local flexible response to 
the pressures and threats of the globalisation of the agro-industrial system.

1. Introduction

Nowadays the problem of valorization of marginal rural areas in Europe is significant. In Italy, 
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remote areas and it is usually complementary to the olive oil and wine production.

The research has been funded by the Tuscan regional administration within a funding call for 
Territorial projects, which had to be based on a network of local firms, other non-production local 
stakeholders and researchers.
The interest for the Iris Pallida came from the high added value of the production, the expected potential of the existing network of local producers and the sensitivity of the local stakeholders to the value of the traditional product not only for direct marketing reasons, but also for the indirect benefits coming from its high aesthetic value for the landscape and therefore for tourism and for its role in the environmental preservation of the area.

The paper presented starts from a description of the general theoretical framework (par.2), it then goes into depth in the definition and roles of typical products in the valorisation of the territory (par.3). The following paragraph is dedicated to the case study analysis of the Iris Pallida supply chain (par.4) and finally some conclusions are drawn on the role of stakeholders and the collective dimension in the valorisation of the product (par.5)

2. General framework

The process of modernization of economic systems has led to the development of situations of differentiated development within agriculture and among farms and territories. The agriculture - made up of professional firms within social communities usually closed and autonomous - that was the dominant sector in rural areas, both for the economy and for social relations, and aiming at producing food for the subsistence of the population, is gradually replaced by an agriculture which, after losing its role in driving the local economy, is fragmented into a multiplicity of ways of being a firm, more and more inspired by the concept of multifunctionality (OECD, 2001; Belletti, 2009). Multifunctionality represents the potential of agricultural activities to carry out simultaneously multiple social functions that go along with the more traditional function of producing food, and cover a diverse set of other "socially desirable" functions, such as land and environmental protection, the preservation of culture and rural traditions, the supply of safe and quality food, the provision of recreational facilities (Basile and Cecchi, 2001). These functions, that until the recent past were not expressed by society and therefore not supported by sectoral and regional policies related to agriculture, are now fully recognized and sought instead in advanced societies, and increasingly supported by new policies (Van der Ploeg, 2006).

In the European Union agricultural policies have encouraged this process of change. Since in the mid-80s the policies have increasingly sought to orient agriculture toward a "European model of agriculture", which led to a gradual abandonment of policies of market support coupled to production in favor of a support more targeted to markets, and increasingly affected by the delivery of quality products and of environmental, cultural, recreational services with a greater emphasis placed on rural development and structural policies.

The consequences of this new approach can be exploited at various levels, both within rural areas, and in relation between local and global.

Within rural areas development is re-oriented so as to exploit local resources - physical and socio-cultural - with the aim of retaining as much as possible the benefits within the area. The development objectives are defined on the basis of the needs, abilities and perspectives of local actors, and the participation of the population is a key principle and mode of action. Instead, in the relations between rural areas and the external environment, the new model implies a decentralization of operations, the philosophy of which moves from an individual and sectoral logic to a territorial one. The decentralization of interventions implies that the territorial partnership (which includes both public, firms, voluntary organizations, etc..) assumes a direct responsibility in designing and implementing development initiatives. Achieving a greater level of spatial interaction and cohesion among social groups and categories, and the creation of strategic extralocal alliances becomes fundamental.
The increasing openness of markets helps to inject new dynamism in rural areas, but at the same time exposes farms to stronger competitive pressures, which require a profound restructuring of both the organization and type of production processes performed, and in relation with the market of products and services.

3. What is a typical product?

3.1. A broader definition
Various definitions of typical agricultural products can be found in academic literature, but they all invariably rotate around the product’s links with its territory which gives the product unique quality characteristics (Letablier and Nicolas, 1994; Barjolle, Boisseaux, and Dufour, 1998; Tregear, 2001; Casabianca et al., 2005; Arfini, Belletti, and Marescotti, 2010; Vandecandelaere et al., 2010; Delfosse, 2011).

Belletti and Marescotti (2012) have recently elaborated a more complete definition, stating that “A typical agrifood product is the result of an historical collective and localized process of accumulation of contextual knowledge based on a combination of specific territorial resources of both a physical and anthropic nature which gives rise to a strong, unique and unrepeateable relationship with the territory of origin”.

The relationship with the territory should, therefore, be established according to the product in question and should draw on various components and aspects of the typicity. These components refer to the environmental dimension and the specific local resources, the production, conditioning and processing techniques, the local social and cultural aspects, as well as the historical factors accompanying the evolutionary trajectories of the product itself. The relationship with the territory should also be seen as dynamic and not static or unchanging.

3.2. History, tradition and identity
In typical agri-food products, historical tradition and local culture assume a central role, at least in the meaning of typicality prevalent in Mediterranean countries. As a matter of fact, it is through a process of evolution that, over time, the techniques and know-how of the local actors are formed, spread, modified, perfected and adapted to the socio-economic, environmental and cultural context of the place (Bérard and Marchenay, 1995 and 2006; Tregear, 2003).

The relationship with the territory can, therefore, also refer to aspects of local identity and culture. In fact, the relationship between a typical product and its territory is not solely derived from the pedo-climatic specificity and its close links with specific and localized production factors of both a tangible (e.g., vegetable varieties or local breeds) and an intangible nature (e.g., the contextual knowledge of the local actors). The relationship is also derived from the local culture where the typical product characterizes the “historical memory” of the local population and represents an element of identity for the same. The element of culture and identity thus assumes a very important role in catalyzing the desire of the local community to preserve the product, and reinforces the valorisation routes set up locally.

3.3. The collective dimension
History and cultural traditions refer to a particular feature of the typical agri-food product: i.e., what distinguishes the typical product from any other specific quality product is that its particular characteristics are the result of its relationship with a particular territory, and that relationship has been established, refined, consolidated and modified over the years within a community, meaning that it is closely linked to a community and not a single individual or firm.
The particular features that arise from a product’s relationship with its place of origin are, thus, the result of a complex evolutionary process of negotiation amongst local producers, and between the same and the local community as well as, over time, when the system opens up to more distant markets, with non-local citizens and consumers. The typical product is the result of this interaction and incorporates know-how built up over time and shared within a territorialized community (Belletti et al., 2002).

The know-how linked to the product’s characteristics and to the production process becomes a common heritage shared within the community of producers and local actors (Barjolle, Chappuis, and Sylvander, 1998). This is often contextual and non-codified knowledge, the reproduction over time of which is made possible through informal mechanisms of oral communication by direct learning; it is knowledge that can only be partially coded within valorisation processes and, in particular, through qualification.

The process of accumulating knowledge and local settlement through interaction allows the product to become the expression of the local society in its organization, values, traditions and tastes which are adapted to the environmental, economic, social and cultural context of the place. In this regard, it is possible to refer the dimension of a typical product’s heritage (Bérard and Marchenay, 2004): the product, and the method used to produce, preserve, distribute, consume and appreciate the same become part of the heritage of the local community which, alone, is justified in using the same for economic, social and cultural purposes. In fact, we can say that typicality is not based solely on the characteristics of the production process and the product, but on the relations between the actors in the system. A typical product thus represents a potential resource for the local community, and aggregative dynamics and collective projects can be developed around the product itself.

The collective dimension of the typical product has important implications in terms of the modalities of economic utilization of the product’s reputation in relation to its territorial origin. In other words, the fact that a typical product belongs to the local collective heritage leads to problems regarding the property rights of the “geographical indication” of the asset and the identification of the limitations to the use of the same.

Due to its collective nature and capability of support the identity of local people, actors who may also be very disparate in terms of typology are usually involved in the valorisation process of a typical product. For example, actors belong to the production and distribution system of the product (in the “supply chain”), with different characteristics (they can be also “non professional firms”, and very often are women) (Anthopoulou, 2010), they can be individuals or local governments (Municipalities, Provinces) or intermediary institutions (producers’ associations or consortia, –local organizations for the promotion of the territory, consumer associations, etc.). Moreover not all the actors will necessarily be within and embedded in the local community: for example, there could be non-local supply chain operators (such as processing or distribution firms), scientific institutions, public institutions, national consumer associations, etc.

Each actor has his own “vision” of the typical product according to his own interests (economic, social, political, scientific etc.). The diversity of actors thus gives rise to a diversity of the objectives to be achieved locally through the valorisation of the product.

In the following paragraph we will analyse a case study referring to a typical non-food product, the Iris Pallida, a minor crop of two remote hilly areas of Tuscany (Italy), whose rhizome is used by the international fragrances industry and seems to have a high potential of valorization in the broader vision that has been highlighted.
4. The case study analysis

4.1. Aims and Methodology
The aim of the case study analysis was to verify the problems and potential of developing a traditional crop in marginal rural areas, through its valorization as a typical product.

The specific aims were those of characterizing the product, its attributes and its relationship with the territory, highlighting the existence of specific and localized production factors and at the same time aspects referring to a local identity and culture related to the product. The potential of valorization is related to the study and functioning of the supply chain and the possibility of building a network of actors aiming at a shared collective territorially embedded valorization strategy.

The research project started from a desk analysis that aimed at the critical elaboration of the national and international literature on the topic, besides the gathering and elaboration of the available statistical official data. The work carried out showed a complete lack of bibliographic material especially on the economic aspects of the production. So the desk analysis was followed by a field analysis with semi-structured interviews to key actors at all the stages of the supply chain. 20 producers have been interviewed in order to highlight the potential and limits of the production phase, 2 stakeholders from the producers association were also interviewed in depth and 2 representatives from the processing industry were interviewed. The field work allowed to put in evidence the following areas of discussion that were debated within a focus group carried out in the production area in order to discuss goals and tools of valorisation of the product.

4.2. The Iris Pallida Supply Chain

Characteristics of the product and of the production process

Iris Pallida is a perennial plant, native to the Dalmatian coast (Croatia) but widely naturalised elsewhere and belongs to Iridaceae botanical group. Once important in western herbal medicine, the plant has been used in perfume production since the 18th century. In the middle of the 19th century its cultivation for marketing started and it is now used mainly as a fixative and base note in perfumery, as well as an ingredient in many brands of gin. It's also the most widely-used fixative for potpourri. Nowadays the industry uses mainly two varieties of this plant, Iris Germanica and Iris Pallida. The first one comes from Morocco, and the second one from Italy. At present Iris is produced in Italy only in Tuscany in two limited hilly areas: in Chianti (near Florence) and in Pratomagno (near Arezzo).

One ton of Iris rhizome produces two kilos of essential oil, also referred to as orris root butter, making it a highly priced substance, and its fragrance has been described as tenaciously flowery, heavy and woody. Recently Iris, or better Iris essence, has had a high success both in traditional and in niche perfumery sector. In fact orris root butter mixed with other substances, is used for making very diverse fragrances (even by very well known producers as Yves Saint Laurent, Guerlain, Christian Lacroix and Prada). The success is also due to the fact that consumers show an increasing interest in natural fragrances.

As far as the production process is concerned, Iris cultivation may have biennial or triennial production cycle (length of the process is related to individual strategy of the producer). The phases of this process can be summarized as follows: Plantation of rooted cuttings; Weeding every spring; Cropping (after two or three years from plantation); “Root cleaning”, that is rhizome roots elimination; Rhizome processing (“Washing and Peeling”, washing the rhizome in water and
manually peeling the skin (to obtain white rhizome) or “Slicing”, that is direct cutting into slices of the rhizome (to obtain black rhizome); Sun drying.

The long production process leads to the realization of two different products: white and black rhizome, whose costs are different because of the different amount of labour used. In fact the white type is considered the finest rhizome as it is cleaner and has a higher flavouring power (content of irones\(^1\)) and it is normally used by the food industry, while the black type is used by the fragrance industry.

The Iris production is strictly related to the territory, both for the unique variety of plants used, the specific pedoclimatic characteristics of the areas (rocky or sandy soils; dry summer and presence of particular winds) and the importance of the contextual knowledge. The actors seem in fact to learn not only by doing but also through the interaction with the other producers. In addition the relationship with the territory can be derived from the local culture where the Iris characterizes the “historical memory” of the local population and represents an element of identity for the same.

*The production phase: evolution and structural characteristics*

As underlined in the previous paragraph the Iris Pallida is produced in Italy only in Tuscany, in the two hilly areas of Pratomagno and Chianti, where the production is associated to the olive tree cultivation and is carried out mainly in between the olive tree rows or within vineyards. The latter usually represent the primary production within the farm. There are only very few farms that are specialised in Iris cultivation and the survey has highlighted as despecialisation is mainly due to the low risk propensity of farms, that are all family owned.

Production techniques are very traditional and only a very small part of the production is mechanized.

In Tuscany there are 300 farms producing Iris, over a surface of about 20 hectares. The production has greatly decreased over the last century owing to the high employment of labour in the cultivation especially in the processing phase at farm level. Nevertheless over the last five years, since 2007, the production seems to be growing again (fig.1). As a matter of fact the low profitability of most agricultural productions, especially in marginal areas, have made this product comparatively much more profitable than before.

The majority of farms producing Iris in Pratomagno region are very small and they are associated within “Associazione Toscana Giaggiolo”, a consortium that was born in the Eighties to preserve this historical cultivation from disappearance. Nowadays it has a fundamental role in the functioning of the supply chain. In fact it coordinates producers activities and it is the intermediate agent in the selling phase in Italy and abroad; it concentrates, packs and stocks production, it controls stocks quality and their conformity to the standards required by the processing industry, and finally it is responsible for the logistics and payment for transportation of the product to

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\(^1\) Irones are a group of methylionone odorants used in perfumery, derived from iris oil, e.g. orris root. Irones form through slow oxidation of triterpenoids in dried rhizomes of the iris species, Iris pallida. Irones typically have a sweet floral, iris, woody, ionone, odor.
France (black rhizome) and to Italy and Germany (white rhizome). In fact associated producers send their products to the French distillation industry (for perfumery), to the Italian one (alcoholic drinks) and to the German one (children dummy).

Other farms can be found mainly in the Chianti area; it’s interesting to underline that in this group there is one larger farm, which has a very good production structure, a mechanized production and an efficient commercial network. The farms of the Chianti are not associated within the Consortium and this is mainly due to a territorial competition and also to the presence of the bigger farm that has a direct relationship with the industry. In the marketing phase the large farm acts also on behalf of the other small producers. Furthermore it’s the only farm that has managed to subscribe contracts with the processing industry lasting six years and automatically renewable. These contracts establish the quantity, quality and price of the production sold and therefore allow a better planning of the production, especially taking into consideration the length of the production process. On the other side they don’t allow any free riding and price speculation on the part of the producers, as the product can be stocked even for a long time and sold when price rises, as it happened in the past years.

Fig.1 – Evolution of production of Iris rhizomes (white and black) between 2000 and 2011 within Associazione Toscana Giaggiolo

The role of the processing industry

The Iris pallida rhizomes are designated to three markets: the French perfumery industry; Italian alcoholic drinks industry; the German children dummy industry.

This market segmentation answers to different needs, in terms of existent rhizome production type: the French industry asks only for black rhizome (mainly for price reasons), from which, through distillation process, it obtains the orris root butter and the concentrated fluid; the Italian and the German industries ask for the most precious white type, because of the different final use they make of it. To answer to these different needs, producers of Toscana Giaggiolo Association process their production after cropping in the following percentages: 89% black rhizome, for the French market and 11% white rhizome, for Italian and German ones.

The main rhizome buyers are distilleries located in Grasse (Provence-France), where the PASS (Pole de competitivité Parfums, Aromes, Saveurs, Senteurs) is located. It is an excellence cluster that hosts firms producing all kinds of aromatic raw materials, distillation firms for flavours and fragrances and perfume firms. The cluster has undergone a major concentration process, so that
at present there are only few big international firms which work in the distillation process, for the food and perfumery sectors\(^2\).

In order to serve the French market the Consortium makes use of a broker, who acts as intermediary with the transformation industries for quantities and prices and earns a commission out of the production sold. The broker is the French firm “Courrin Jean et Fils SA”, located in Grasse, that has the commercial monopoly in the area, for distribution of aromatic raw materials coming from all over the world. Every year, when Iris production is finished, the broker facilitates the subscription of contracts for quantities and prices with firms, for black and white rhizome. On the contrary the relationships with the Italian and German buyers are regulated only by the Association.

Producers that don’t belong to the Association use a direct channel with the French distillation industry, to which they sell directly their products, without any kind of intermediation. As already mentioned these producers have managed to subscribe contracts for six years and in any case before the beginning of the production process, while the Association subscribes the contract only when the production process is already finished, making it much weaker in terms of bargaining power.

Nevertheless Iris Pallida market is characterized by a strong imbalance between the French industries demand that is extremely higher than Tuscan supply. This is due to the low production and its unique quality and would encourage investments to increase the production. This goal has some limits in the industry propensity to keep the level of price in case of higher supply and also at production level in the scarce availability of reproduction material that at moment comes only from the use of part of the rhizomes obtained.

As a result the processing industries buy in Tuscany only little percentage of the rhizomes, while larger quantities come from the Moroccan and Chinese market. Despite this, Tuscan production ensures a better quality of products (in terms of unique content of irones) and at present manages to sell any amount of product at a higher price. It’s not clear yet\(^3\) if this unique quality might be replicable in other areas if the reproduction material were available to other actors.

The following table summarizes a SWOT analysis of the Iris Pallida supply chain.

\(^2\) Some of the most important buyers are Robertet, Charabot, Mane, Payan et Bertrand, Laboratoire Monique Rémy.

\(^3\) The research analysing the characteristics of the soils and of the climate in relation to the quality of the product is still being carried out by the National Research Council (CNR).
Strenghts | Weaknesses
---|---
- Quality
- Local production specialisation (Chianti/Pratomagno)
- Territorial proximity \(\rightarrow\) widespread information \(\rightarrow\) relational capital
- High potential for introduction and diffusion of innovation (learning by interaction)
- No national competition
- Only price based international competition
- Existing Organisation of producers through the Association
- Landscape value of the production
- Environmental value of the production for hydro-geological preservation of marginal areas
- Socio-economic value of the production for the preservation of marginal areas
- Lack of reproduction material
- Terraced cultivation
- Low mechanisation of the production process (high labour cost)
- Multi annual production process (high rigidity of supply)
- Irregular inter-annual supply
- No supply contracts
- Diversified interest in the valorisation of the production
- Old farm management
- High internal competition (associated vs non associated producers) \(\rightarrow\) affects collective valorisation strategies
- ↑ supply ⇒ ↓ price

Opportunities | Threats
---|---
- Positive trend of the perfumes industry (in spite of the crisis) ↑ demand
- Funding opportunities especially on the local plans for rural development
- Origin certification? PGI?
- Foreign competition only based on price and quantity
- Oligopsony \(\rightarrow\) high bargaining power of the distillation industry
- High variability of market prices of the product \(\rightarrow\) strictly related to the trend of the perfumes market

5 Stakeholders and the collective dimension in the valorisation of the Tuscan Iris Pallida

Given the Iris Pallida close links with specific local resources that refer to the local production system and with the local community as a whole, it is obvious that its valorisation poses problems of a collective nature which interact in a complex way with the individual business aspects.

The presence of a particularly intense relationship with the territory leads to a broadening of the subjects potentially interested in valorisation. The potential stakeholders are not just a number of different firms but also a collection of non-business subjects: local and supra-local government bodies (the Tuscan Regional Administration), the local community associations (Pro-loco and town government), as well as subjects external to the local system belonging to the business world (the French broker, the distillation industry, the wine and spirits industry), the scientific world and civil society (consumer, cultural associations, etc.).

Extending the subjects interested in valorisation also extends the objectives it is intended to pursue through the same. The valorisation drivers are diverse and the objectives that are being pursued through the valorisation are:

- revitalization of the production and product supply chain, which have been caught off guard by the evolution of new technologies and markets;
- creation of new business opportunities both in the production and the processing phase;
- preservation and development of employment and income in the production area;
- valorisation and reproduction of specific resources: in particular local culture, unique landscape, and/or traditional systems of cultivation and processing.
The collective dimension and the heterogeneity of the interests of the various actors can also be seen *in the production supply chain for the Iris*. To create the value of a typical product it is necessary to establish relationships between the businesses involved at the various stages of the production process. These relationships will be of a competitive nature (distribution of added value within the supply chain) and a collaborative nature (creation of a unitary product identity and preservation of the competitive advantage with respect to substitute products) (Barjolle and Sylvander, 2002; Arfini, Albisu, and Giacomini, 2011).

The Iris Pallida farms should overcome competitive relationships towards more collaborative relationships especially between the two production areas. This would be very important in order to devise a collective valorisation strategy for the product (for example, setting up a collective brand, applying for a PDO or PGI, organizing a promotional campaign or festival).

The setting up of forms of coordination between businesses is, therefore, a central issue for the valorisation of the Iris, around which a network of agents characterized by different interests and objectives and different visions of the typical product, which are sensitive to different interpretations of its “value”. These visions and objectives may not be compatible with each other and, therefore, in the absence of suitable mediation, conflicts may arise that could compromise the valorisation of the typical product and the evolution of its production system.

Since it is deeply rooted in the local context, the production system of the Iris has a direct economic effect on the strictly commercial aspects whilst it has indirect positive effects on the accumulation of the various other types of capitals involved: natural capital, social capital (trust, organizational ability, regulations and institutions), human capital (skills and knowledge), physical capital (non-renewable resources). These capitals affect the quality of life of the local population, as well as that of the subjects directly involved in the production process.

The valorisation of the Iris should, therefore, not only take into account the economic effects of a monetary nature, but also the external effects (Casabianca, 2003) and other non-economic effects generated on the various types of capital (Belletti and Marescotti, 2009 and 2011.b).

Being able to guarantee the remuneration of the resources used during the valorisation process is, therefore, only one aspect of the *sustainability of the valorisation* (Vuylsteke, 2003; Marescotti, 2003; Belletti et al., 2008; Arfini, Belletti, and Marescotti, 2010; Vandecandelaere et al., 2010; Bowen and De Master, 2011), which affects numerous aspects including:

- possible expropriation of certain subjects from the possibility of valorising the product (exclusion effects);
- emergence of possible conflicts within the production territory;
- inclusion of external subjects with a conflictual vision with respect to that of the local subjects;
- loosening or elimination of the (real) links between product and specific local resources, leading to the risk of “de-typicalisation” and, in the medium-long term, loss of product identity;
- changes in the equilibrium between the production system of the typical product and its natural environment.

Therefore, the sustainability of a valorisation process and the individual initiatives set up within the same should be considered in the context of its economic, social, cultural and environmental profiles.

The last aspect to be highlighted is that of the *fairness of the valorisation process* which is part of an extended definition of sustainability. In fact, the setting up of valorisation initiatives for a typical
product often involves the reassignment of the property rights to the product itself, its geographical name, the resources connected to the same and, consequently, a change in the distribution of the economic and non-economic benefits.

Therefore, a particular attention should be paid to the distribution of the benefits to the majority of the rural population and between firms, and not just to the individual entrepreneurs; besides, vertical distribution of the value created on the market (product price) between agents located at various stages of the supply chain (producers of the agricultural raw materials, processing firms, business concerns) should be monitored, as often operators at the upstream phases of the supply chain, further away from the end market, are subject to the expropriation of the added value created in the typical product; more in general, the effects on the quality of life of the local community should be at the centre of a sustainable and fair valorization initiative.

The Iris Pallida supply chain is in other words a symbolic case study of how "glocality" can be a local flexible response to the pressures and threats of the globalisation of the agro-industrial system, though it’s clear that there is a profound imbalance in the distribution of the added value along the supply chain. Therefore new projects of valorization are being discussed in order to allow a higher appropriation of the value upstream the chain.

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