MARKETING AND ZONING ("GREAT ZONING"): RESEARCHES AND VARIOUS CONSIDERATIONS.[(1)]

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Summary
In preceding works on zoning "GRANDE ZONAZIONE" (GZ) ("Great Zoning") the so-called "GRANDE FILIERA" (GF) ("Great Chain") has been discussed. Within this frame, among the 54 indicators which can be used to read and to appraise a zoning process there are also Marketing and Promotion as fundamental factors of the so-called "GRANDE ZONAZIONE" (GZ) ("Great Zoning"). This GZ starts from economic, social and existential aspects which represent from the bottom of the chain the "GRANDI OBIETTIVI) (GO) ("Great Objectives") of the vine growing process too and therefore of zoning and does not start from "technical" aspects which are typical of the so-called "Small Zoning" or " Thematic Zoning", as for instance soil, climate, vineyard model and its management, etc., which instead represent the "tools" to reach the "great objectives" above quoted (Cargnello G. 1997 and 2003).
Hence, we have to emphasize that the "great objectives" must not be confused, as it often happens also in our research groups, with the means used for achieving such objectives.
The goal of this work is to stress the basic role that either economic issues or marketing and promotion assume in zoning. The latter, however, should be managed in a fair and unbiased way according to the other technical, economic-social and existential factors of the production process as stated in the so-called "Great Chain".
The work has been carried out in the Northeast part of Italy, in the Veneto Region and, more specifically, in the Province of Treviso in the "TERRA DELLA VALLE DEL PIAVE" ("Land of the Piave Valley"), taking into account the following basic methodology: Cargnello G., (1999); 2003a; Carbonneau A., Cargnello G., (2003).
The philosophical, methodological and application results coming from these researches are very encouraging. They induce us to intensify them in order to put into practice, in the zoning process, the technical, economic, social and existential indications on the "Great Zoning", which emerge from these researches.

Résumé
Dans de précédents travaux sur le zonage "GRANDE ZONAZIONE" (GZ) ("Grand Zonage"), on a traité, entre autre, de la "GRANDE FILIERA" (GF) (Grande filière) où parmi les 54 descripteurs prévus pour lire et évaluer par exemple un zonage, sont compris aussi la Communication – Marketing et les aspects qui y sont liés, comme facteurs fondamentaux du "GRANDE ZONAZIONE" (GZ) "Grand Zonage" qui part des aspects économiques, sociaux et existentiels qui représentent en filière du bas vers le haut les "GRANDI OBIETTIVI" (GO) ("Grands Objectifs" de l'activité vitivinicole aussi et donc du zonage, et qui ne part pas des aspects "techniques" typiques du "Petit Zonage" (PZ) ou "Zonage Thématique" tels que par exemple le sol, le climat, le modèle de vignoble et sa gestion, etc., qui représentent les "moyens" pour atteindre les "grands objectifs" cités ci-dessus (Cargnello G. 1997, 1999 a-b et 2003 a-c).
Il faut donc souligner à nouveau que les "grands objectifs" ne doivent pas être confondus, comme il arrive souvent dans notre secteur aussi, avec les moyens utilisés pour atteindre ces objectifs.

L’objectif de ce travail est de démontrer ultérieurement l’importance fondamentale de l’aspect économique dans le zonage, et en particulier la composante communication et marketing qui doit cependant être gérée de manière équitable et harmonique en ce qui concerne les autres facteurs de l’activité productive, c’està-dire les aspects techniques, économiques-sociaux, et existentiels, prévus dans notre “Grand Filière” (GF).
Ce travail a été conduit a Ormelle dans le Nord-Est de l’Italie, en Vénétie en Province de Treviso dans la “TERRA DELLA VALLE DEL PIAVE” (“Terre de la Valléè du Piave”), en suivant la méthodologie de base suivante: Cargnello G., (1999); 2003a; Carbonneau A., Cargnello G., (2003).
Les résultats philosophiques, méthodologiques et applicatifs obtenus dans cette recherche sont très encourageants et nous induisent à intensifier ces activités, dans le but d’appliquer dans la pratique du zonage les indications d’ordre technique, économique, social et existentiel fournies par ces recherches sur le “Grand Zonage”.
Mots clé: communication, marketing, zonage, grand zonage.

Introduction

In recent years too much emphasis has been put on a zoning process focused on “terroir” (soil and climate) as a means to improve vine growing in a specific area or territory. In fact, starting from the concept that a prestigious wine is created in the vineyard, it is assumed that an accurate study of climatic and soil characteristics of a certain area allows to identify the ideal genotypes and growing processes in order to obtain the best wine possible.
This is very important, but experience shows us increasingly that it is not enough to guarantee the quality of wine with respect to the various aspects specified in the so-called “GRANDE FILIERA” (GF) (Great Chain) (Cargnello G., 1997, 1999a-b, 2003a, 2004: Carbonneau A., Cargnello G., 2003).
An appropriate marketing and promotion strategy and the use of innovative techniques make it possible to include also all those economic, social and environmental aspects that only the method of the so-called “GRANDE FILIERA” (GF) ("Great Chain") and therefore the so-called “GRANDE ZONAZIONE” (GZ) ("Great Zoning") can comprehend, not only zoning focused on “terroir” (soil and climate). In relation to zoning it is therefore essential to consider also aspects relating to marketing and promotion, such as they have been included in the "Great Chain" "Great Zoning".
In this study we provide first of all an analysis of the most important economic features of some firms located in the “TERRA DELLA VALLE DEL PIAVE” (“Land of the Piave Valley”), an area where innovative zoning is still at its beginning, but the commitment of the administrators of the municipality of Ormelle (Treviso) and of local entrepreneurs has already brought about brilliant results, thanks to an effective product research and promotion activity (Cargnello G. 2003a-b-c-d-e).
Secondly we introduce the results obtained using an innovative technique in some of them, taking as a sample the autochthonous variety par excellence, the Raboso Piave evaluating also all qualitative aspects, including ethical and social ones, with respect to the “Great Chain”.

Wine Making in the “Land of the Piave Valley” – Materials and Methods

Wine making has always played a fundamental role in the economy of the “Land of the Piave Valley”, the characteristic territory that accompanies the river which is sacred to our Nation on its way towards the Adriatic Sea. The valley extends from the hills near Conegliano in the province of Treviso to the flatlands passing by a series of small villages where even today one can sense the typical country atmosphere and encounter the local wine specialties such as the Raboso Piave, the autochthonous variety par excellence of the Marca Trevigiana (Treviso area).
Cultivated varieties are numerous, ranging from the international Cabernets, Merlot, Carmenere, Chardonnay etc, to the Incroci Manzoni and the excellent and original Raboso Piave, not to forget the Raboso Veronese. From some of them the “Great Piave Wines” were born, wines with a tortuous history, but today corner stone for a social economic re-launch based essentially on innovative experiments. By betting on these wines, numerous winemakers have launched a very appreciated product with an alcohol level kept at very “low” levels for health reasons (health of the body, the briefcase, the driver’s licence,… the soul, etc.) and consumption habits that may even be straight and superficial, but very much approved of by consumers and producers alike, as well as other great wine

classics. The cause of such a kind of production lies essentially in the type of terrain which is very fertile, the constant availability of water and the possibility to utilize organic fertilizers (since once there were many livestock farms). This, logically, allowed winemakers to obtain above all a high yield per hectare (elevated social economic quality) at the shortcoming of what is now generally defined "quality", but what a more careful analysis terms "technical organoleptic quality" since it represents only a marginal portion of the broader "global quality" a product can offer (Cargnello G. 1995, 1999c). High yields have also been rewarded by the fact that a dense network of cooperative wineries of ample dimensions buy huge amounts of raw materials each year thus rewarding "quantitative" production styles.
In the past such high yields contributed to the fortunes of local firms (elevated social economic quality), but later on, with the market looking for ever more complex and structured products, Piave wines have entered a phase of extraordinary innovation: in fact, "qualitative" production diminished, marketing was not oriented towards bottled products but rather towards sales in big tanks, but what was missing most of all, was an attitude in the area towards marketing communication.
Through the years wine entrepreneurs have understood the reasons for the failed success of their product and are working to improve the situation of their wine making, differentiating their production with new wines, for which there is a strong demand in the market, and increasing the general qualitative level, not only the classical organoleptic level.
Today important experimentations are led by local firms in this area, in collaboration with important researchers in the sector, aiming essentially at promoting the territory and the typical and original features of the area, valorising the autochthonous varieties through highly innovative wine making and oenological techniques, so that while drinking such wine one can "drink and eat, savour and appreciate the territory" (Cargnello G., 2004) .
Results obtained so far are extremely positive; there is still much work to be done, but as this is bound to be the future of the wine making sector (wine making which through time can be adapted to a fair and sustainable level), this path must be followed with determination, for the sake of single producers and above all of the whole territory of the "Land of the Piave Valley".
The present research was carried out on a random sample of seven exclusive wine making firms located in the territory of the municipality of "Ormelle" (in the province of Treviso), in the Northeast of Italy.
In two firms, in addition to balance sheets, simulations of balance sheets have been done in the light of experimentations carried out by the "Sezione di Tecniche Colturali dell'Istituto Sperimentale per la Viticoltura di Conegliano" (Department of Cultivation Techniques of the Experimental Institute for Viticulture of Conegliano), aiming at comparing and evaluating innovative production and business administration strategies.
As can be seen in Table 1, the sample is fairly homogeneous in relation to the type of firm: the majority of them owns the respective cultivated land; surfaces are quite variable (CV=40%). The main vine growing technique is "Bellussi", which is used in all firms but one.
All firms taken into account turn their grapes into wine and provide for its bottling; only one firm owns a bottling plant, whereas the others turn to third parties for this process.

Economic results of the firms

All firms exploit their cultivated land in a fairly homogeneous way, but they differentiate themselves with regard to management (Table 2). As far as labour income per working hour is concerned, it shows very good values (average € 27.91 per hour), demonstrating a strong interest towards labour in the wine making sector. Firms who best manage to valorise their manual labour are those who avail themselves of higher mechanization levels.
Table 3 shows some statistical indicators of the main indexes used to evaluate the profitability of the three different production processes employed by the wine making firms taken into account.
First of all it must be highlighted that the presence in the area of oenological factories and cellars which have found satisfactory sales opportunities for their wines determine good profitability for the grape production phase, making it possible also for less efficient firms to cover production costs.
Low variability is due to the small difference in price of the cultivated varieties (the highest prices are those of Pinot grigio and Prosecco grapes).

The very high price of the grapes (eg. Pinot grigio and Prosecco) negatively influences convenience of raw material processing, above all if we consider that the average price of loose wine in recent years has not grown as fast as the price of grape, due to producers' low power of negotiation in the loose wine channel.
Indeed, profit margins from transformation seems to be really low, in some cases inexistent if not negative, even if a few little firms stand out for succeeding in valorising better than the others their wine, also loose-sold, through their own outlet. In order to promote also loose wine product, it is essential to adopt a diversification strategy, aiming at introducing new and more valorised products, preferably derived from innovative production methods, associated especially with the world of communication.
Bottled wine production determines the highest average unitary profit, although there is considerable variability between the various firms, due to the fact that they do not adopt a single production method and price level, but differentiate themselves considerably, not only in relation to the diversification of wine offer[1], but also to their different ability to exploit promotion, investing in various advertising means and organizing shows and visits to the firm.
Therefore, bottled wine production, better if sold directly at the firm, seems to be the right road to follow in order to guarantee excellent business profits, especially in a market that seems to appreciate new products more than those traditionally offered.

Analysis of innovative techniques in the vineyard: the case of D.M.R. (Doppia Maturazione Ragionata: Reasoned Double Ripening) (Cargnello G., 1992).

To illustrate the importance of adopting innovative techniques in the valorisation of a product as strongly tied to its territory as the Raboso Piave, in the following we will outline - in collaboration with "SOC Sezione di Tecniche Colturali dell'Istituto Sperimentale per la Viticoltura di Conegliano" (Department of Cultivation Techniques of the Experimental Institute for Viticolture of Conegliano) - the results of the experimentation of DMR (Reasoned Double Ripening) in one of the previously examined firms.
In this firm the DMR technique for the production of Raboso Spumante wine (Raboso sparkling wine) has been applied to an experimental parcel. The economic results of the new technique have been confronted with those obtained by using the current production system and with those obtained by using the ordinary production technique for Raboso Piave wine (test), in all cases referring to the current surface (1,00 ha i.e. 2,47 a) destined for Raboso Piave vine.
In Table 4 it can be observed that already the current usage of DMR in only a part of the parcel (0,3 ha) shows distinctively better results than those obtained from the ordinary Raboso Piave production technique, and also that profitability, especially in terms of profit and bottling margin, results even higher when applying DMR to the entire vineyard. This compensates well for a lower profitability of the grape production process which comes from a lower yield.
Innovative production techniques and valorisation of the bottled product represent the way to the highest profits in the balance.

Analysis of DMR using the "GRANDE FILIERA" (GF) ("Great Chain") approach.

According to the "GRANDE FILIERA" ("Great Chain") approach any production system can be examined and valued by taking into account different variables set up in declining order of importance. A vineyard's production is thus described by 54 variables selected and arranged in order of their importance in the territory in which the analysis is taken out. In this analysis, parameters that previously were regarded as essential, such as production and automation, are overshadowed by others of fundamental importance such as harmony with man, respect for the environment, healthiness etc. of great ethical social and existential importance. The ideal production model would have the highest possible values in all of the 54 variables. This theoretical model is in full harmony with every

[1] Extremely positive values can be found when bottled wine is the result of research that brings about particularly innovative products.

considered aspect. For further information about this methodology see Cargnello G., 2003a; Carbonneau A., Cargnello G., 2003 as mentioned in the biography.
In the area of the Piave lowlands this analysis has proved that the various production systems reflect mainly what in the scheme is defined by the line named TEST (Fig. 1). The production systems have been compared by using a probe of Raboso Piave obtained from grape thinning (line DIRAD. GRAPP) and one from DMR.
When comparing the results it can be noticed that the ideal reference is never surpassed by the real probes as it corresponds to the maximum values of the variables. All in all the technique that comes closest to the ideal is DMR, the line of which is only slightly inferior to the ideal one, but it is surpassed by the other techniques in some variables, such as TRADITION (highest value in the traditional system), LOCAL MARKET (which still favours the traditional system) and low yield per hectare (surely the most valid parameter for grape thinning).
For judging a production system this scheme appears complete as it takes into account a great number of aspects which normally are neglected, such as the economic, social and existential ones.
Figure 1 shows that grape thinning has resulted in the worst outcome (68 points out of 100), followed by the control method (78 out of 100). DMR (Reasoned Double Ripening) stands out with excellent results (91 out of 100).
This is due mainly to the major harmony that DMR proves in comparison to the control method and above all grape pruning, with respect to man and environment, entrepreneurship, local policy, non-local markets, product healthiness, existential profit (quality), both for society and the enterprise, consumer preference, sensorial quality, innovative qualitative and quantitative production control.

Conclusions

With regard to the strictly economic analysis of the winemakers of the “TERRA DELLA VALLE DEL PIAVE” (“Land of the Piave Valley”) it emerged that the highest profits can be obtained when selling a bottled product. But also the production of grapes (especially some types such as Pinot Grigio and Prosecco) has very positive effects on a company’s budget for the high prices that can be achieved, an aspect which generally means low profitability for the transformation of grapes into loose wine, with respect to the other phases in the production process.
In general the results seem positive: profits from grape production explain the appearance of new plants in winemaking firms, while profits from bottling - especially the high margins - are the motivation for the continuous improvements of oenological production sites in this area which occurred in recent years.
Reality can be further improved when – especially in the case of Raboso Piave – innovative campaigning techniques are employed. The undertaken experimentations have revealed how DMR (Doppia Maturazione Ragionata) (Reasoned Double Ripening) and the type of wine that results from it for example, is capable of raising profits to distinctively higher levels than those of the traditional technique and those of grape thinning. The former has certainly had positive effects on profits from grape production and loose wine production but its greatest advantage can be achieved in bottling: in this process the highest profits can be obtained.
For this reason this technique is surely capable of valorising product obtained in the “Land of the Piave Valley” putting it in the condition to launch new products which are at the same time highly innovative and traditional and as such express their territory by communicating (drinking, eating, tasting, enjoying) the territory itself.
In their highest values these variables constitute the ideal production system. This theoretical system is then compared to the other examined “traditional” systems in order to have an overview of how distant they are from the ideal model.
With regard to Raboso Piave DMR, (Reasoned Double Ripening) has produced the best results when compared to grape pruning and the traditional method: considering the 54 variables (concerning technical, economic, social and existential aspects) this production system is the best one for the above mentioned variety.
This case study is an example of how tradition, innovation and communication (that is what our motto states: a step back to the future) can and must be combined in the best possible way even in territories where detailed innovative zoning has not yet been carried out. This does not mean to water down the

importance of zoning but underlines its complementary role, together with other initiatives, in influencing success of winemaking firms in a certain territory.
The present work shows how it is very important to consider communication and marketing in the phase of zoning, as pointed out in the “GRANDE FILIERA” (“Great Chain”) and “GRANDE ZONAZIOONE” (“Great Zoning”).

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Table 1: Main farm features

	Medium Value
TOTAL SURFACE (HA)	15,46
OWNERSHIP (HA)	14,05
TENANCY (HA)	1,41
AGRICULTURAL USABLE LAND (HA)	13,82
GRAPE VARIETIES (N°)	8
BREEDING SYSTEM	
BELLUSSI (%)	62,74
SYLVOZ (%)	37,26
BOTTLING (%)	10,29

Table 2: Economic farm indicators

	Average	Standard Deviation	Variation Coeff.
SALES	356.540,04	190865	53,5%
SALES/Ha	24.853,58	4517	18,2%
SALES/Hour of work	47,14	20	43,2%
NET INCOME	228.658,16	109211	47,8%
NET INCOME/Ha	16.116,26	2323	14,4%
NET INCOME/Hour of work	30,61	13	42,7%
LABOUR INCOME	200.882,17	99244	49,4%
LABOUR INCOME/Ha	14.072,58	2414	17,2%
LABOUR INCOME/Hour of work	26,91	12	45,4%

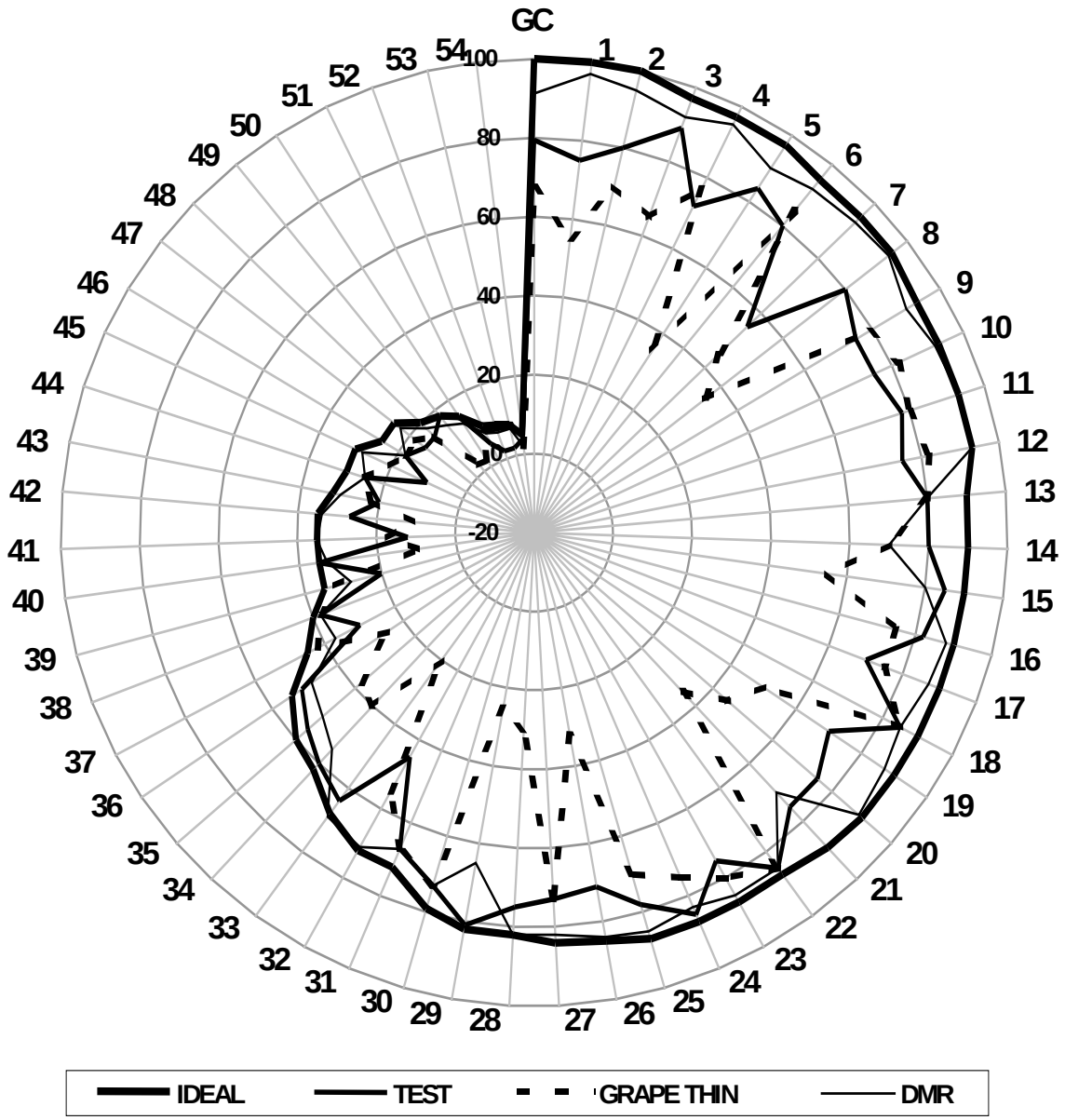
Table 3: Process Economic indicators

	Average	Standard Deviation	Variation Coeff.	Minimum Value	Maximum Value
Grape average price €/Kg	0,61	0,06	10,3%	0,57	0,75
Grape production cost €/kg	0,28	0,06	19,6%	0,23	0,36
Price of transformation from grape into loose wine €/kg	0,67	0,12	17,7%	0,55	0,86
Cost of transformation from grape into loose wine €/kg	0,27	0,05	16,7%	0,21	0,33
Loose wine production cost €/litre	0,74	0,11	14,4%	0,63	0,91
Loose wine average price €/litre	1,26	0,11	9,0%	1,11	1,43
Price of transformation of loose wine into bottled wine €/litre	2,08	0,66	31,8%	1,46	3,48
Cost of transformation of loose wine into bottled wine €/litre	1,32	0,42	31,8%	0,90	2,12
Bottled wine average price €/litre	3,39	1,02	29,9%	2,64	5,60
Bottled wine production cost €/litre	2,06	0,48	23,6%	1,63	3,03
Grape production profit €/kg	0,33	0,09	28,9%	0,22	0,49
Loose Wine production profit €/litre	0,52	0,20	39,0%	0,25	0,80
Bottled wine production profit €/litre	1,34	0,62	46,2%	0,60	2,57
Wine making margin €/kg	0,06	0,08		-0,03	0,20
Bottling margin €/litre	0,82	0,66	80,8%	0,27	2,24

Table 4: Comparison among current production methods, test and innovative techniques

	Current production methods	TEST*	RDR
Grape production profit €/kg	0,22	0,20	0,19
Loose Wine production profit €/litre	0,33	0,32	0,40
Bottled wine production profit €/litre	2,57	1,21	2,84
Wine making margin €/kg	0,03	0,03	0,09
Bottling margin €/litre	2,24	0,89	2,44

FIG. 1 - GREAT CHAIN" (GC): READING AND EVALUATION OF PRODUCTIVE MODELS (PM) GLOBAL (GC) AND ON 54 ASPECTS. MODEL OF IDEAL REFERENCE, WITNESS (TEST), GRAPES THINNING (GRAPE THIN.), DOUBLE REASONED RIPENING (DMR).

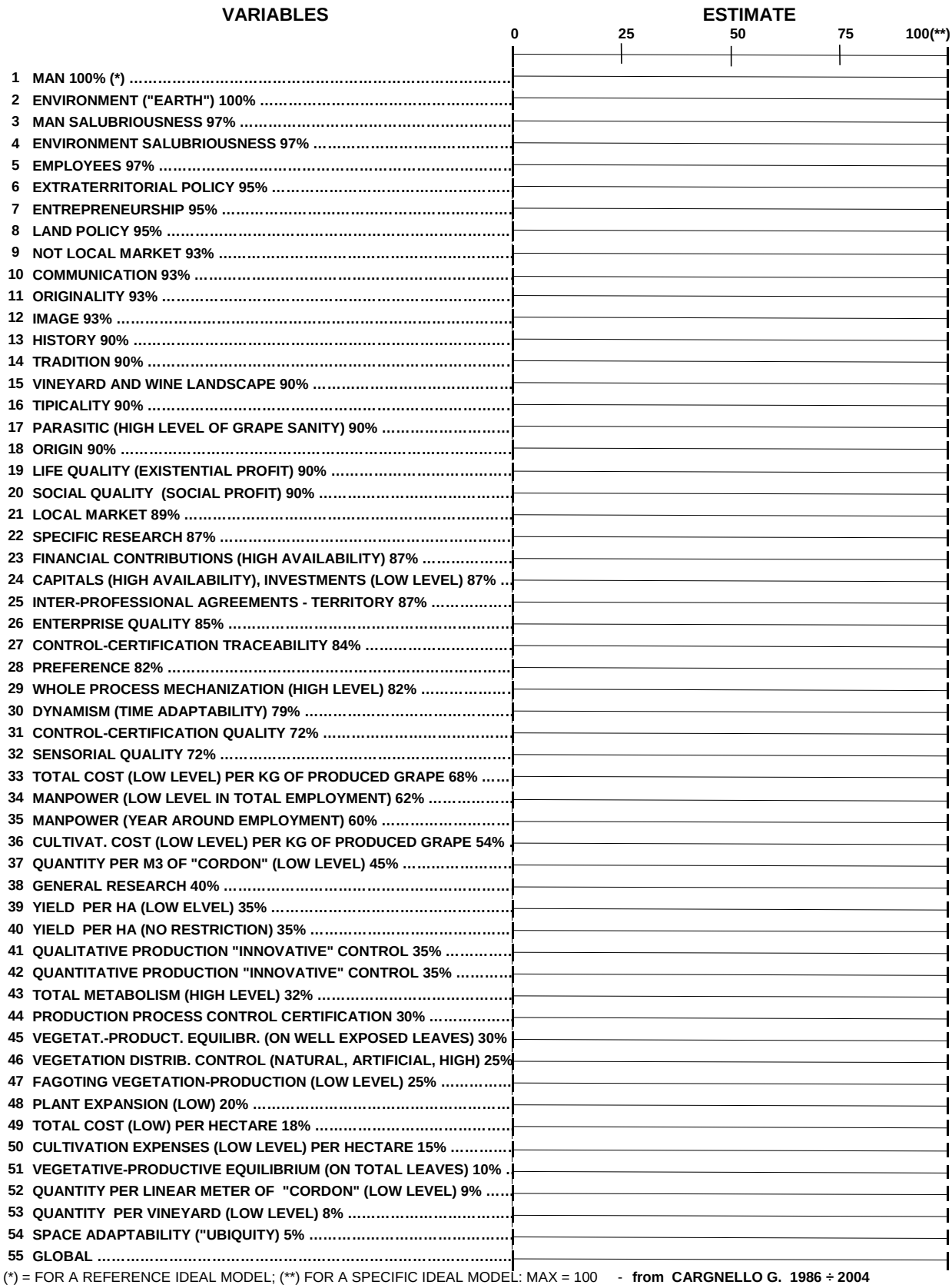


ASPECTS: (THE NUMBERS REPRESENT THE %)

1= MAN 100; 2= ENVIRONMENT ("EARTH") 100; 3= MAN SALUBRIOUSNESS 97; 4= ENVIRONMENT SALUBRIOUSNESS 97; 5= EMPLOYEES 97; 6= EXTRATERRITORIAL POLICY 95; 7= ENTREPRENEURSHIP 95; 8= LAND POLICY 95; 9= NOT LOCAL MARKET 93; 10= COMMUNICATION 93; 11= ORIGINALITY 93; 12= IMAGE 93; 13= HISTORY 90; 14= TRADITION 90; 15= VINEYARD AND WINE LANDSCAPE 90; 16= TIPICALITY 90; 17= PARASITIC (HIGH LEVEL OF GRAPE SANITY) 90; 18= ORIGIN 90; 19= LIFE QUALITY (EXISTENTIAL PROFIT) 90; 20= SOCIAL QUALITY (SOCIAL PROFIT) 90; 21= LOCAL MARKET 89; 22= SPECIFIC RESEARCH 87; 23= FINANCIAL CONTRIBUTIONS (HIGH AVAILABILITY) 87; 24= CAPITALS (HIGH AVAILABILITY), INVESTMENTS (LOW LEVEL) 87; 25= INTER-PROFESSIONAL AGREEMENTS - TERRITORY 87; 26= ENTERPRISE QUALITY 85; 27= CONTROL-CERTIFICATION TRACEABILITY 84; 28= PREFERENCE 82; 29= WHOLE PROCESS MECHANIZATION (HIGH LEVEL) 82; 30= DYNAMISM (TIME ADAPTABILITY) 79; 31= CONTROL-CERTIFICATION QUALITY 72; 32= SENSORIAL QUALITY 72; 33= TOTAL COST (LOW LEVEL) PER KG OF PRODUCED GRAPE68; 34= MANPOWER (LOW LEVEL IN TOTAL EMPLOYMENT) 62; 35= MANPOWER (YEAR AROUND EMPLOYMENT) 60; 36= CULTIVATION COST (LOW LEVEL) PER KG OF PRODUCED GRAPE 54; 37= QUANTITY PER M3 OF "CORDON" (LOW LEVEL) 45; 38= GENERAL RESEARCH 40; 39= YIELD PER HA (LOW ELVEL) 35; 40= YIELD PER HA (NO RESTRICTION) 35; 41= QUALITATIVE PRODUCTION "INNOVATIVE" CONTROL 35; 42= QUANTITATIVE PRODUCTION "INNOVATIVE" CONTROL 35; 43= TOTAL METABOLISM (HIGH LEVEL) 32; 44= PRODUCTION PROCESS CONTROL CERTIFICATION 30; 45= VEGETATIVE-PRODUCTIVE EQUILIBRIUM (ON WELL EXPOSED LEAVES) 30; 46= VEGETATION DISTRIBUTION CONTROL (NATURAL, ARTIFICIAL, HIGH) 25; 47= FAGOTING VEGETATION-PRODUCTION (LOW LEVEL) 25; 48= PLANT EXPANSION (LOW) 20; 49= TOTAL COST (LOW) PER HECTARE 18; 50= CULTIVATION EXPENSES (LOW LEVEL) PER HECTARE 15; 51= VEGETATIVE-PRODUCTIVE EQUILIBRIUM (ON TOTAL LEAVES)10; 52= QUANTITY PER LINEAR METER OF "CORDON" (LOW LEVEL) 9; 53= QUANTITY PER VINEYARD (LOW LEVEL) 8; 54= SPACE ADAPTABILITY ("UBIQUITY) 5.

From Cargnello G. 1986 ÷ 2004

TAB. 5 - **"GREAT CHAIN" (GC)**- GLOBAL GENERAL LOCAL ANALYTICAL IDEAL (*) AND SPECIFIC (**) SCHEME FOR INTERPRETATION AND GLOBAL HARMONIC OVERALL EVALUATION OF PRODUCTION MODELS (PM) COMPLYING ALL THE ETHICAL, MORAL, LEGAL AND CULTURAL ASPECTS (QUALITY).



(*) = FOR A REFERENCE IDEAL MODEL; (**) FOR A SPECIFIC IDEAL MODEL: MAX = 100 - **from CARGNELLO G. 1986 ÷ 2004**