

BALSAMIC VINEGAR OF MODENA: CASE STUDY

Federico Desimoni
Managing Director – producers association

A glass of balsamic vinegar sits on a rustic wooden surface. In the background, a wooden spoon is visible, slightly out of focus. The scene is dimly lit, creating a warm, intimate atmosphere.

Aceto Balsamico
di Modena PGI

What is it?

Land





Geographical area

Human and natural factors



Tradition



Cultural heritage



Know how



A photograph of a wine cellar with rows of wooden barrels. The barrels are made of dark wood with metal hoops and are resting on metal stands. The cellar has wooden walls and a brick floor. The lighting is warm and focused on the barrels, creating a sense of depth and tradition. The word "Passion" is overlaid in white text in the upper center of the image.

Passion



Aceto Balsamico
di Modena PGI

How is it made?

7 kind of vines



1. Albana
2. Ancellotta
3. Fortana
4. Lambrusco
5. Montuni
6. Sangiovese
7. Trebbiano

A large, circular industrial vat made of metal, filled with a dark, bubbling liquid. A large wooden paddle is positioned diagonally across the vat. A thermometer is inserted into the liquid, showing a red scale. The background is a hazy, industrial setting with a large metal tank visible on the left.

Concentrated or
cook grape must



Blended with fresh and
ten years old wine
vinegar



wood

A photograph of several large wooden barrels in a cellar. The barrels are made of vertical wooden staves held together by horizontal metal hoops. The wood is aged and shows some staining. The text "60 days maturing" is overlaid in white. The floor is made of reddish-brown bricks.

60 days maturing

A photograph of a wine cellar filled with numerous wooden barrels. The barrels are arranged in rows, some on the floor and others on wooden racks. Many of the barrels have small, light-colored labels attached to them. The wood of the barrels appears aged and slightly weathered. The lighting is warm, highlighting the texture of the wood. The text "3 years of aging" is overlaid in the center of the image in a white, sans-serif font.

3 years of aging

A close-up, dimly lit photograph showing a person's hand pouring a dark liquid from a bottle into a small glass. The hand is wearing a black wristband and a gold ring. The background is dark and textured, possibly a wooden surface. The word "Certification" is overlaid in white text across the center of the image.

Certification

FROM *DE FACTO* TO *DE JURE* SYSTEM

BALSAMIC VINEGAR OF MODENA



In 1933

The Italian Ministry acknowledges with an **official act**, the “age-long and characteristic industry of the Balsamic Vinegar in the Modena area



In 1965

The specifications of production are published in the Italian Gazzetta Ufficiale (Official Gazette).





2009

Aceto Balsamico di
Modena become a
European PGI

ACETO BALSAMICO DI MODENA PGI

Year	Certified production (lt)	Sales turnover (€) *
2010	94.850.902,93	/
2011	92.438.281,45	/
2012	91.003.701,25	/
2013	86.701.447,57	870.000.000
2014	97.536.596,06	970.000.000
2015	93.268.441,17	930.000.000
2016	95.205.777,82	950.000.000
2017	97.547.933,20	970.000.000
2018	90.700.865,32	910.000.000
2019	95.855.223,39	960.000.000
2020	90.844.076,87	910.000.000
2021	105.000.000,00 **	1.100.000.000**

* including
compound and
processed products

** forecast

Design of a new product: improvements

- A new condiment better than wine vinegar
- Without any direct competitors (there is not generic Balsamic Vinegar)
- Creation of a unique identity
- Monopoly on the collective designation of the products



Improvements

- Increase of demand, sales and production up to 100 million of litres (forecast for 2021)
- Increase of selling price and the sales turnover up to 1 billion of euros
- Increase of export up to 92% of the production (50% inside EU, 50% in third Countries)
- Increase to destination Countries (market access) nowadays more than 120
- Increase of operators up to 65 acetaie, more than 180 grape must producers and almost 200 bottlers.



Improvements

- Increase of high quality product (see Consortium Profile brand creation)
- Increase the value of the raw material up to the double
- Foreign investment in the area
- Improvement of GI management body and their function through European Law (1992) and an Italian law in 1999
- Consortia (producers association) recognised by law as private body in charge of public functions delegated by the Governemnt



BALSAMIC VINEGAR OF MODENA



INSIDE THE ITALIAN BACKGROUND

Data & Design
by Mauro Rosati – Qualivita
CIBUS 2021

PDOs & PGI SYSTEM IN ITALY

180.000 OPERATORS
(80.000 FOOD, 100.000 WINE)

285 RECOGNISED PROTECTION CONSORTIA
(163 FOOD, 122 WINE)

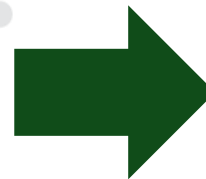


EVOLUTION OF THE PDOs & PGIs SECTOR



2003

578 PDO PGI FOOD & WINE PRODUCTS
5 bil € PRODUCTION VALUE



2020

839 PDO PGI FOOD & WINE PRODUCTS
17 bil € PRODUCTION VALUE

ECONOMIC IMPACT PDOs & PGIs

17 BIL € PRODUCTION VALUE PDOs & PGIs

- **7,7 BILLION €** FOOD SECTOR
- **9,2 BILLION €** WINE SECTOR

350 mln Balsamic Vinegar of Modena production value
1 billion Balsamic Vinegar of Modena commercial value



ECONOMIC IMPACT - ITALIAN REGIONS

1° VENETO



REGIONE del VENETO

3.946 mln €

2° EMILIA-ROMAGNA



3.519 mln €

3° LOMBARDIA



2.194 mln €

4° PIEMONTE



REGIONE
PIEMONTE

1.318 mln €

5° TOSCANA



Regione Toscana

1.156 mln €



EXPORT OF PDOs & PGIs MADE IN ITALY

9,5 BLN € EXPORT VALUE OF PDOs & PGIs

- **3,8 BLN €** FOOD SECTOR
- **5,6 BLN €** WINE SECTOR

315 mln Balsamic Vinegar of Modena export
production value

900 mln Balsamic Vinegar of Modena export
commercial value

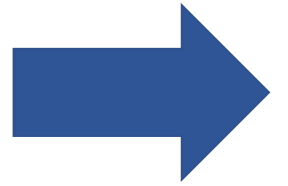


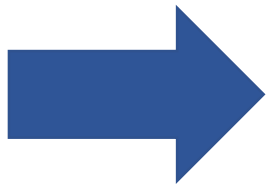
VALUE OF BALSAMIC VINEGAR OF MODENA

- In Europe the **value of sales** of final products with a protected name and their raw material is on average **twice** that of similar products without certification.
- This is the case of Balsamic Vinegar of Modena
- In particular situation or in some foreign market the value can be more than twice



In the Balsamic Vinegar of Modena case the GI became an economic, social and political value that brought an horizontal wealth to ...





consumer, companies and public institutions

Consumer: awareness, information, transparency, engagement, proud of their own land.

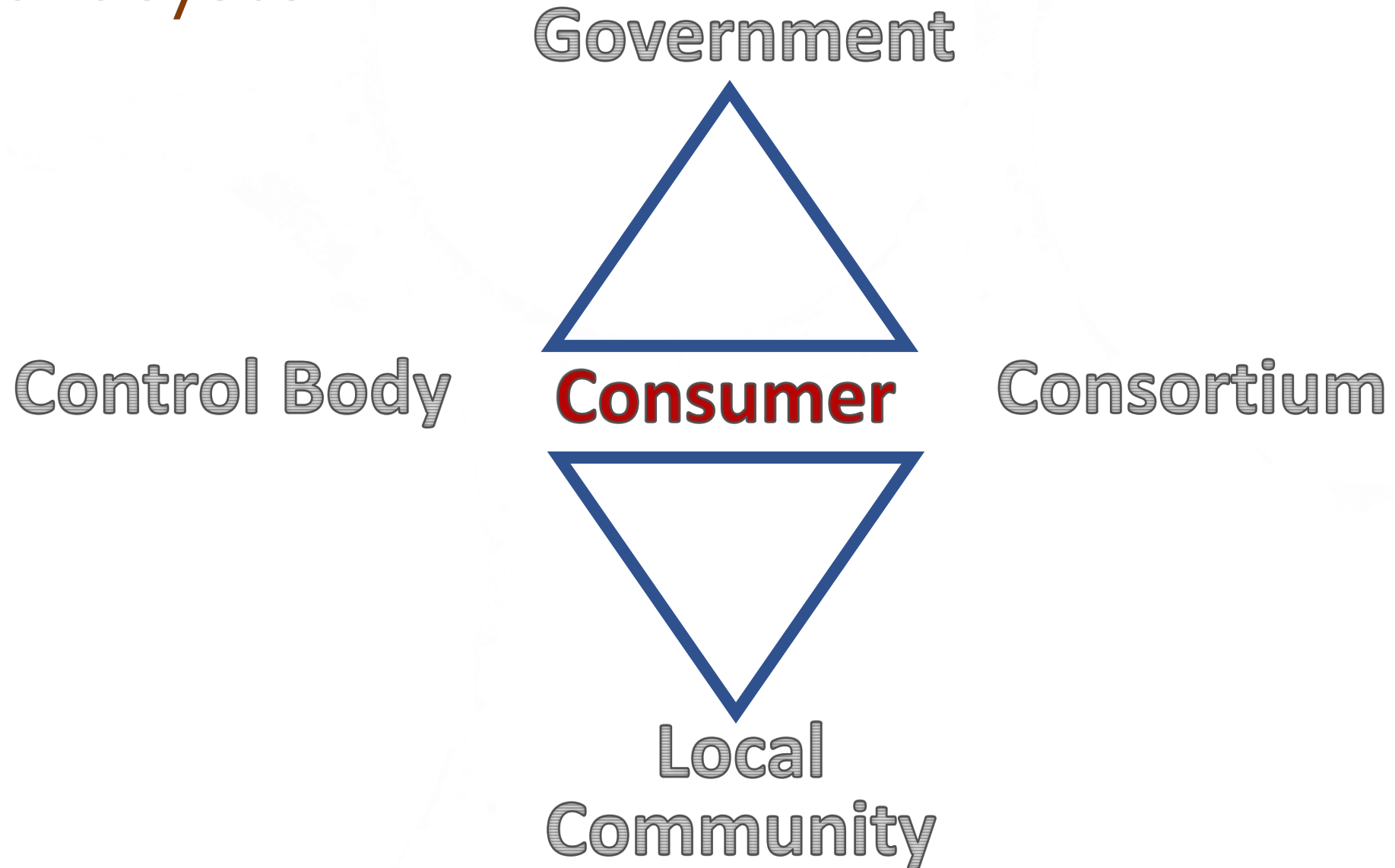
Companies: no external competition, access to new market, tourism opportunities, increase the value of both final product and the entire value chain.

Public institutions: social, economic and enviromental sustainability, rural development, job creation, improvement of welfare and living standards.

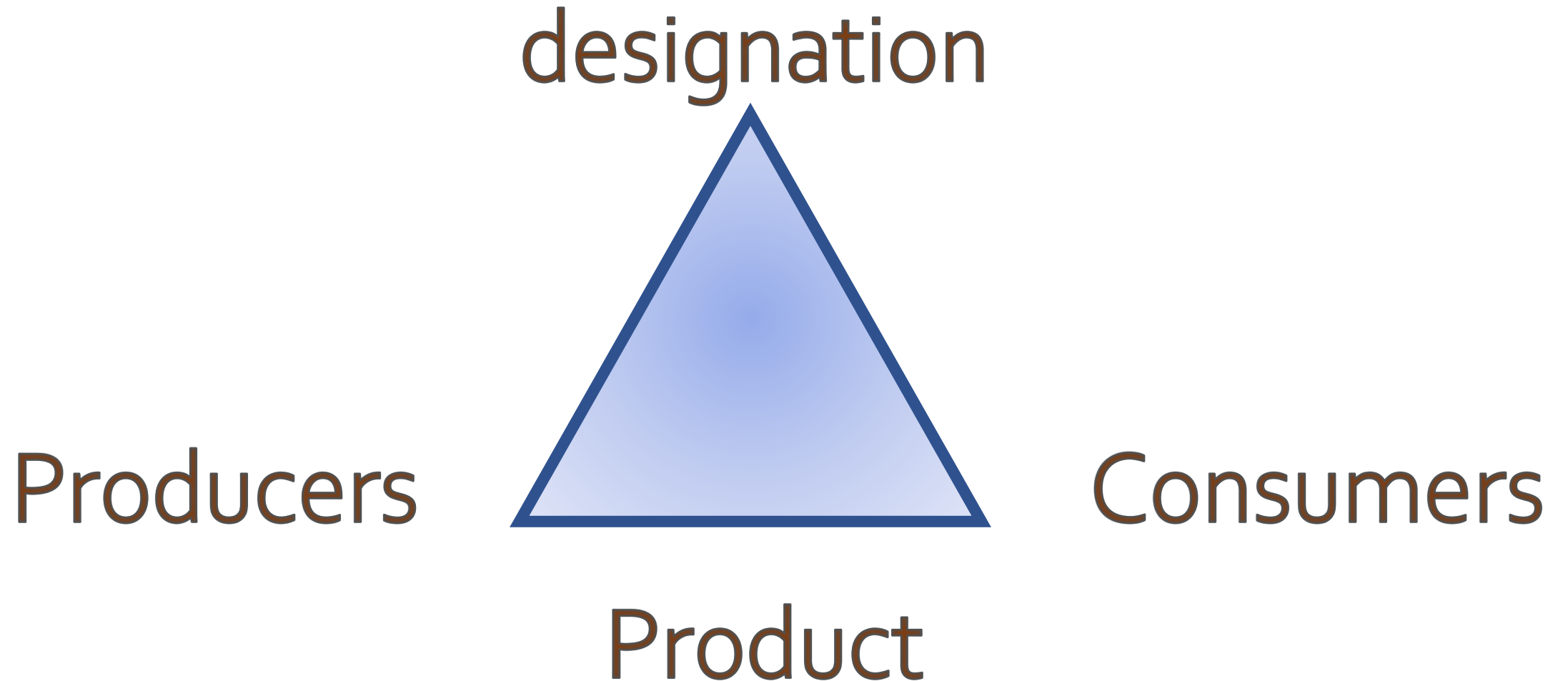
LEADING, MANAGING AND PROTECTING THE GI SYSTEM




Public system

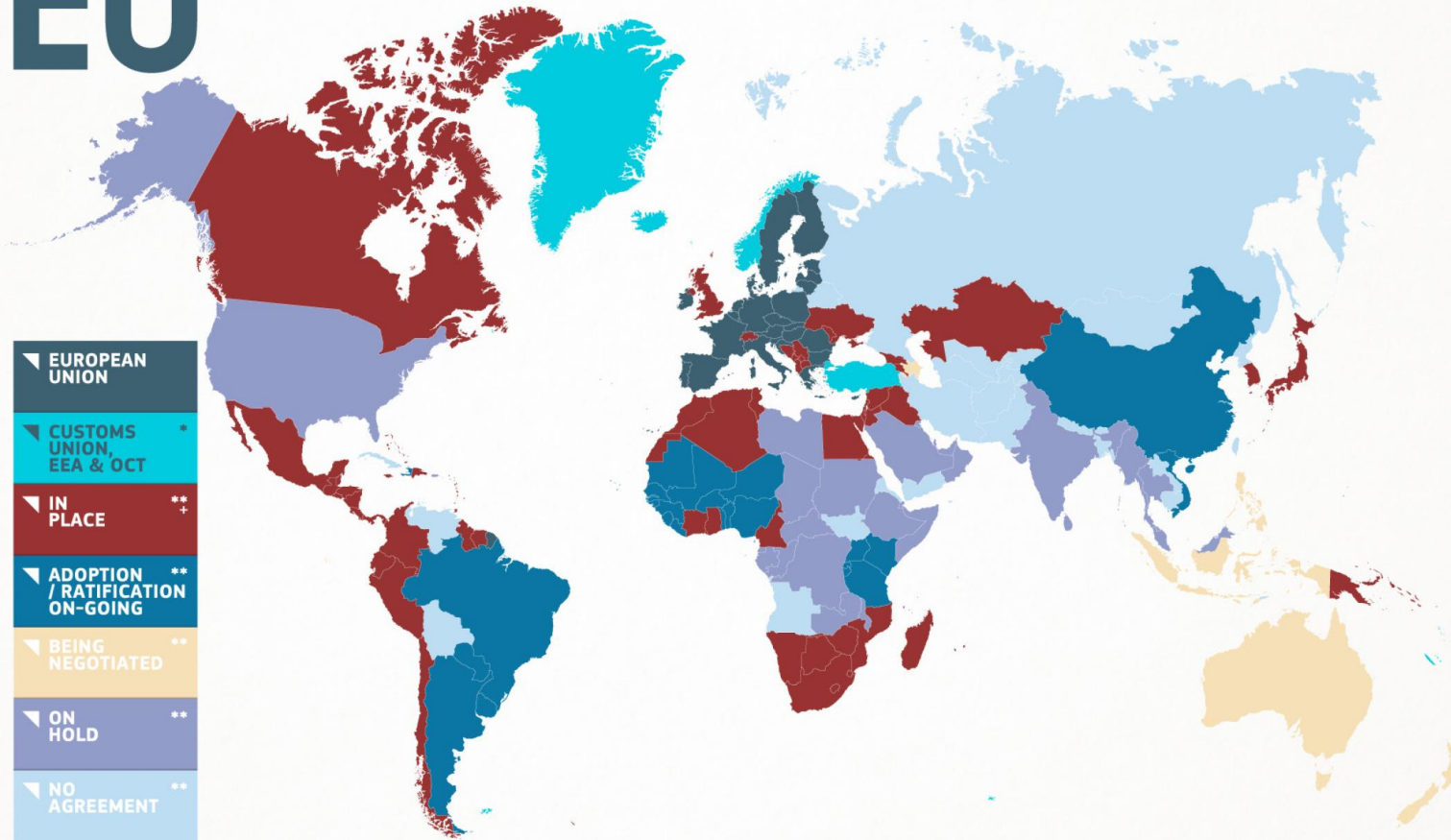


Protection of a public interests



-
1. Bilateral agreements EU vs other Countries
 2. Registration as GI or collective/certification trade mark
 3. Legal protection: legal dispute around the world and supervisory agents
 4. Digital surveillance and action undertaken
- 

EU trade agreements 2021



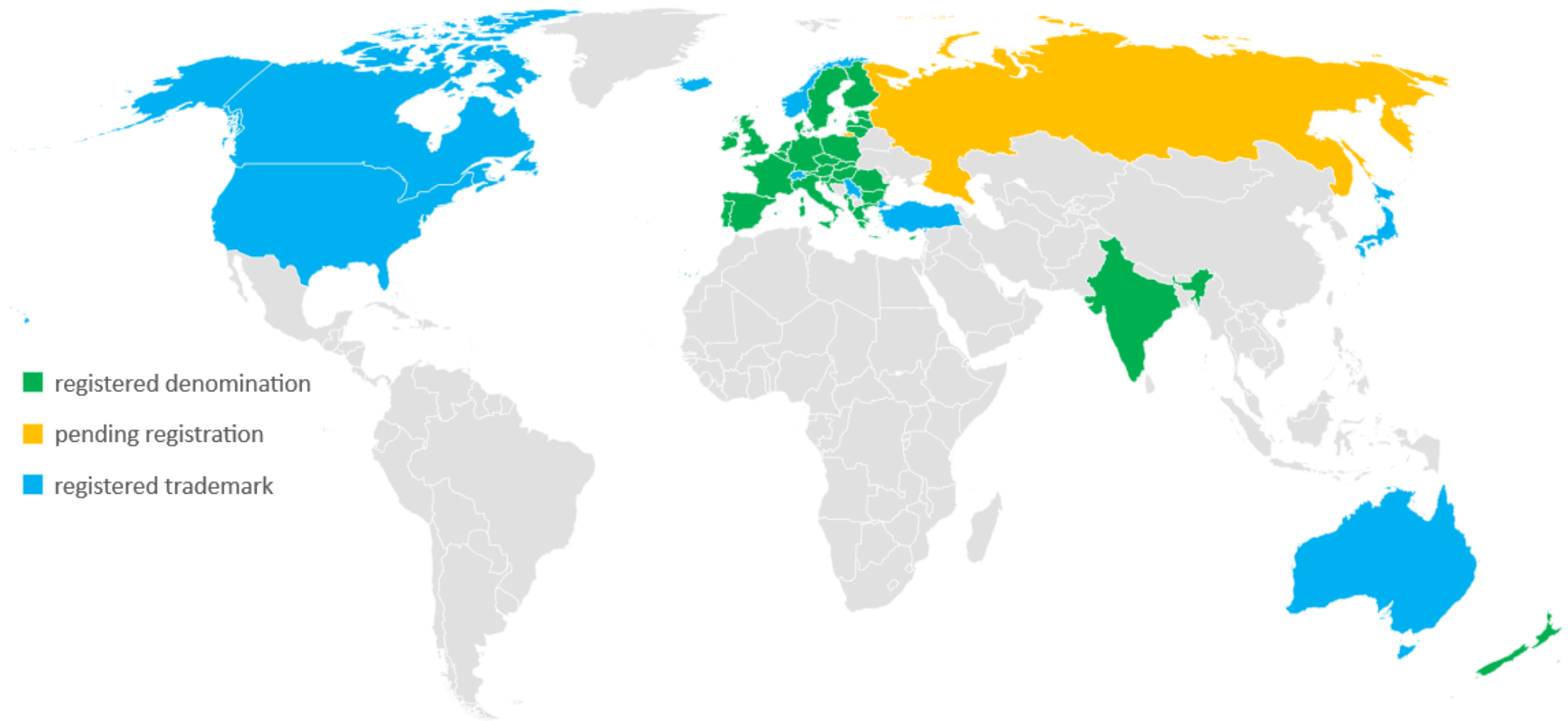
* European Economic Area (EEA) / Overseas Countries and Territories (OCT).

** Free Trade Agreement (FTA), Deep and Comprehensive Free Trade Agreement (DCFTA), Investment Agreement, Enhanced Partnership and Cooperation Agreement (EPCA), Partnership and Co-operation Agreement with preferential element (PCA).

+ The agreements with Chile, Tunisia, and Eastern and Southern Africa are currently being updated; the updated agreement with Mexico is under ratification. The DCFTA with Georgia does not apply in South Ossetia and Abkhazia. The agreement between the EU and the United Kingdom is applied provisionally, pending ratification by the EU.




1. Summary map of the trade agreements between the European Union and Third Countries: in most cases the negotiation also includes the protection of the denomination Aceto Balsamico di Modena PGI among other Geographical Indications.



2. Summary map of the Countries where the Consortium has registered the name "Aceto Balsamico di Modena", or its own logo (see legend).

3. Legal protection: legal dispute around the world

- We built a net of international legal firm acting all over the world
 - We sue companies at national level in case of counterfeit products or misleading behaviour or in case of infringement of our intellectual property rights
- 

3. CONSORTIA SUPERVISORY AGENTS

investigate on private citizens and companies,
analyze and acquire copy of legal documents

01

seize counterfeit products or imitation or
evocation

02

provide official report to the National
Authority

3. SUPERVISORY AGENTS

ACTIVITY CARRIED ON BY
THE SUPERVISORY AGENT
INITIATES AN
ADMINISTRATIVE
PROCEEDING AND CAN
LEAD TO A SANCTION



3. LEGAL PROTECTION

The supervisory agents provide official reports to their Consortium (group)

01

The Group involves his law firm in the relative member State

02

Warning letter and legal proceeding

3. EVOCATION AND IMITATION EXAMPLES





1868
Balsamico

DEUTSCHER
balsamico
traditionell





100 ml



Aceto
Balsamico

Aceto
Balsamico
di Modena I.G.P.

250 ml





ON THE SHELF

4. Digital surveillance: global analysis (*last 4 months data*)

Listings	Platforms	Sellers	Sales	Revenues €
8,693	43	2,967	186,434	€ 3,561,611.96

Type of Infringement	N. of Listings	N. of Seller	Avg. Price €	Items Sold	Revenues €
Evocazione	1762	543	€ 33.42	84,376	€ 1,539,942.36
ABM - Consorziati	1939	623	€ 32.19	37,768	€ 1,185,669.58
ABM - Non consorziati italiani	2810	1469	€ 13.77	39,240	€ 519,101.49
ABM - Non consorziati stranieri	1989	1057	€ 24.51	22,463	€ 277,915.33
Presunta contraffazione	193	63	€ 20.13	2,587	€ 38,983.20
Total	8693	2967	€ 24.37	186,434	€ 3,561,611.96

Product Cat.	N. of Listings	N. of Seller	Avg. Price €	Items Sold	Revenues €
Aceto	6920	2741	€ 25.19	134,697	€ 2,761,115.94
Glassa/Crema	1184	412	€ 17.21	25,799	€ 422,493.95
Condimento	563	213	€ 29.00	25,789	€ 366,552.12
Cesto	10	8	€ 85.41	147	€ 11,439.90
Bevanda	16	4	€ 5.25	2	€ 10.05
Total	8693	2967	€ 24.37	186,434	€ 3,561,611.96

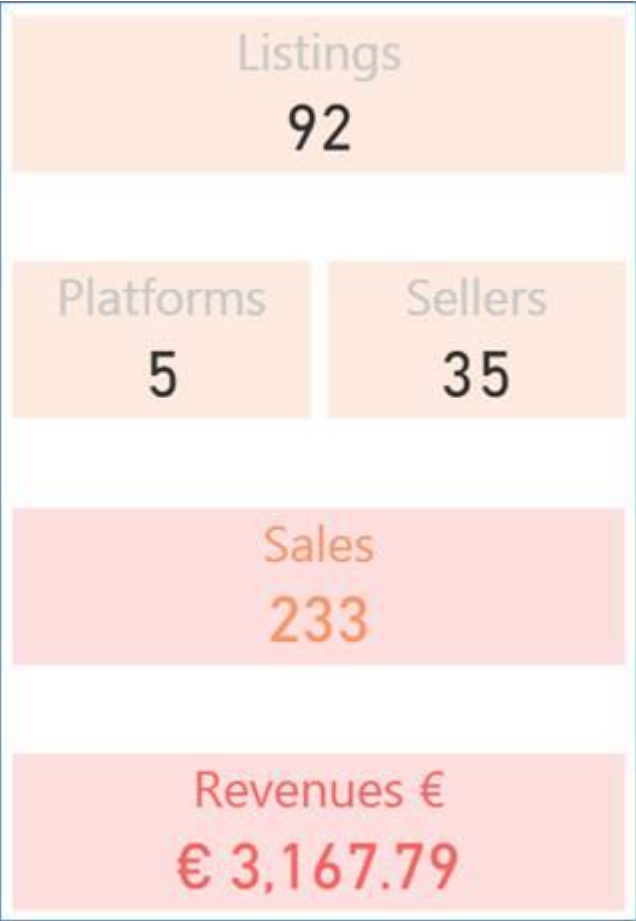
4. Digital surveillance: global analysis (*last 4 months data*)

Listings	Platforms	Sellers	Sales	Revenues €
8,693	43	2,967	186,434	€ 3,561,611.96



Listings Details per Seller Area					
Seller Country	N. of Listings	N. of Seller	Avg. Price €	Items Sold	Revenues €
United States	1379	293	€ 40.12	141,996	€ 2,920,326.60
Poland	16	3	€ 64.44	765	€ 199,691.78
Germany	628	129	€ 21.18	7,045	€ 168,101.88
China	732	249	€ 41.69	21,386	€ 112,540.12
Italy	1134	177	€ 21.99	2,132	€ 59,338.10
Mexico	8	1	€ 56.00	312	€ 17,473.17
United Kingdom	425	65	€ 57.43	831	€ 14,682.19
Malaysia	248	171	€ 9.28	2,737	€ 13,379.48
Indonesia	1949	1092	€ 7.66	2,920	€ 12,005.59
Germany	65	9	€ 24.12	316	€ 11,774.61
Total	8693	2967	€ 24.37	186,434	€ 3,561,611.96

4. Detected infringements, undertaken actions and results
(last 4 months data)



Year	Month	N. of Listings	Average Price €	Item Sold	Revenues €
2021	04. April	5	€ 16.58	67	€ 924.40
2021	05. May	60	€ 21.62	72	€ 1,317.27
2021	06. June	12	€ 19.39	11	€ 231.79
2021	07. July	15	€ 20.61	83	€ 694.33
Total		92	€ 20.89	233	€ 3,167.79

Type of Infringement	N. of Listings	Average Price €	Item Sold	Revenues €
Contraffazione	85	€ 20.95	226	€ 3,044.54
Evocazione	7	€ 20.19	7	€ 123.25
Total	92	€ 20.89	233	€ 3,167.79

Listings per Complaint Status	
DELETED	91
INFRINGING CONTENT REMOVED	1



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Modena PGI
Raspberry
\$15.65
+ \$20.67 shipping



Modena PGI
Vanilla Fig Barrel
\$15.65
+ \$22.80 shipping



Modena PGI
Strawberry Barrel
\$15.65
+ \$22.80 shipping



Modena PGI
Roasted Garlic
\$15.65
+ \$20.67 shipping



Modena PGI
Pomegranate
\$15.65
+ \$35.12 shipping

SAVE UP TO 25% WHEN YOU BUY MORE



Modena IGP Pineapple Habanero Barrel Aged Balsamic Vinegar White, 5 fl oz

Condition: **New**

Volume pricing: 1-1 \$15.65 (each)
2+ \$11.74 (25% off each)

Quantity: **10 sold** [See feedback](#)

Unit Price: **US \$15.65**

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100% buyer satisfaction

Limited quantity remaining

More than 70% sold

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Shipping: **\$21.29** International Priority Shipping to Italy via the Global Shipping Program [See details](#)

Item location: Newark, Ohio, United States

Ships to: United States and many other countries | [See details](#)

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White Balsamic Vinegar - 5 Liter

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★★★★★ 1 rating

Price: **\$58.97**

- 5 Liters
- White wine vinegar and cooked white grape-must of the Modena region
- Clear color and full aroma
- Perfect to dress salads, with white meat, fish, and to prepare clear sauces
- Imported from Italy

\$58.97

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THANK YOU