

EXPLORING QUALITY LABELLING STRATEGIES FOR FISHERIES AND AQUACULTURE LOCAL PRODUCTION

Abstract :

The increasing fish consumption along with the rising competition in the global seafood market has brought fisheries and aquaculture producers to adopt several differentiation and marketing strategies. Therefore, labelling schemes were introduced to respond to a growing demand for traceable and sustainable products. However, the proliferation of quality labels brought general confusion, calling for collective and public fish labels to ease decision-making. In our case study region (Tuscany, Italy), a number of policy-driven efforts were deployed for establishing regional labelling schemes for fisheries products with no observable impact in the market. Meanwhile, local companies independently implemented a number of successful private and regional labels. The purpose of this research is to contribute to potential options for collective regional labelling schemes of fisheries and aquaculture products, through a case study analysis building on industrial organization as well as agro-food value-chain management approaches. Our empirical results highlight key issues and perspectives on labelling policy for fisheries and aquaculture products of Tuscany.

Keywords:

Value chain; Quality conventions; Primary producers; Vertical coordination; Eco-labels.

Résumé :

La croissante consommation de produits halieutiques et l'augmentation de la compétition dans le marché mondial des produits de la mer ont poussé les producteurs primaires de la pêche et de l'aquaculture vers l'adoption de différentes stratégies de diversification et marketing. Par conséquent, des programmes de labélisation ont été introduits afin de pouvoir répondre à la croissante demande de produits qui soient traçables et durables. Toutefois, la prolifération de marques de qualité a créé une confusion générale pour les acheteurs et les consommateurs, d'où la nécessité de labels collectifs pour faciliter la prise de décisions tout le long de la filière. Dans la région de notre cas d'étude (Toscane, Italie), plusieurs efforts ont été mis en place – grâce à des financements publics - afin d'établir des programmes de labélisation pour les produits halieutiques primaires. Cependant, aucun label n'a été enfin implémenté. En même temps, des entreprises locales ont pu créer - indépendamment - de nombreux labels locaux et privés. L'objectif de cette recherche est de contribuer, par la connaissance des dynamiques liées au fonctionnement des labels de qualité existants, à l'évaluation des potentielles opportunités de création de labels locaux collectifs pour les produits de la pêche et de l'aquaculture. L'analyse d'une étude de cas est menée sur la base des approches de la gestion des filières agroalimentaires. Nos résultats empiriques mettent en évidence les enjeux clés et les perspectives de la gouvernance des marques des produits de la pêche et de l'aquaculture en Toscane.

Mots clés :

Filières; Convention de qualité; Producteurs primaires; Coordination verticale; Eco-labels.

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Background

The increasing globalisation of the fisheries sector, along with changes in policy regulations as well as climate change and technological development, are confronting the fishing and aquaculture industries with a wide range of challenges. The rise of fish consumption - both from fisheries and aquaculture - along with the increasing competition in the seafood market has recently brought producers to adopt differentiation strategies aimed at increasing profits (Grunert, 2005). Furthermore, the fishing industry has been responding to an increasing consumer demand for traceable and sustainable seafood products with the introduction of labelling schemes (Morgan et al., 2014). This practice is quite recent for the fish industry (Roheim and Sutinen, 2006) and – as a fast growing voluntary and market-based labelling – is being recognized as an important instrument in global environmental fisheries governance (Oosterveer and Sonnenfeld, 2012). New voluntary schemes, such as sustainability certifications for sustainable fish and related labels were adopted (de Haes et al., 2010), allowing for credit of the firm's engagement to guaranteeing quality features and to differentiating products from competitors (Riganelli and Marchini, 2016). However, in some cases, the proliferation of labelling schemes has brought to a general confusion and uncertainty among producers, retailers and consumers on how to distinguish a sound certification scheme for fish, calling for collective and public quality labels for fish, in order to ease decision-making and lessening prices for consumers (European Parliament, 2016).

In our case study region, Tuscany (Italy), a number of policy-driven efforts have been deployed for establishing regional labelling schemes for fisheries products (Dintec, 2015) with no impact registered in the market yet (at the best of our knowledge). Meanwhile, local fisheries and aquaculture companies in the region independently adopted and implemented a number of private labels, as well as regional and sustainability brands, especially for retailers.

In order to understand what are the attributes of the adopted labels – likely to overcome potential uncertainties within product exchanges - our research interest is to explore how these marketing strategies are actually expression of upstream business-to-business agreements. Building on Marion (2003), the convention theory approach can help understand how those institutional agreements¹ are shaped mainly by the role of each actor involved, rather than by the demand itself. We will then focus on the relations between actors (e.g. suppliers, retailers) characterising the functioning of business-to-business marketing. In fact, business-to-business exchanges represent generally a main part of the commercial trade often overlooked (Marion, 2003). With respect to the fisheries and aquaculture case of Tuscany, we suggest to study the inter-organisational commercial exchanges to understand the hypotheses - of each actor - that allowed composing a particular quality convention and establish a shared institutional

¹ According to Marion (2003), markets represent the dominant institutional forms of contemporary economy for coordinating actions between individuals. Thus, institutional agreements are here meant as the set of socioeconomic practices - characterised by a particular regularity - such as habitual, expected and self-fulfilling behaviours (Marion, 2003; p. 27).

agreement represented, in turn, by a specific label. The marketing function is in fact considered key for composing conventions and for making conventions truly convincing; in particular the study of “labels” can help in this analysis since they can synthesize the convictions that are implicitly shared by both buyers and suppliers (Gomez, 2003).

Aims

The purpose of this research is to identify and map – for regional fish production - the determinants that influence the implementation and participation of firms in voluntary labelling programs through specific quality conventions and related forms of coordination. Labelling strategies are here considered as expressions of marketing and business-to-business conventions established through shared institutional agreements and aimed at reducing uncertainties within product exchanges. Through this analysis we aim at providing decision-making with further insights on the existing adoption of labelling schemes at a regional level in order to contribute with further knowledge to potential options for collective regional labelling schemes.

Methods

A desk based analysis was combined with a literature review and semi-structured interviews to primary producers and stakeholders of fisheries and aquaculture sectors in our case study region. Interviews were designed building on a causal dynamic framework (Grando et al., 2016) derived from industrial organization (Porter, 1981) and agrofood value-chain management approaches (Rastoin and Gherzi, 2010), for investigating conditions, strategies and performances of primary producers. Therefore, results were analysed building on quality convention theory (Sylvander, 1995; Boltanski and Thévenot, 1999; Gomez, 2003; Marion, 2003; Ponte and Gibbon, 2005; Ponte, 2016).

Findings

Case study region. With regards to caught marine fish in Tuscany, according to the Italian Ministry of Agricultural, Food and Forestry Policies (Mipaaf, 2012), the 2012 production was estimated at almost 41 million € in revenues. The incidence of the Tuscan fishing production on the Italian total reaches a market share of about 4.5%. Fish production belongs mainly to the blue fish category. With regards to aquaculture, Tuscany occupies an important position in terms of quality and quantity for the production of valuable marine species (over 20% of national production). The production value, mainly from sea bass and gilthead bream, amounted to almost 25 million € in 2010. According to the Italian National Institute of Statistics, Tuscany is a net importer of fishery products and aquaculture while the exports in 2013 only exceeded 4 million € (Dintec, 2015).

Business environment. The first results of our empirical analysis provide a general view of the conditions and related strategies implemented by fisheries and aquaculture producers with relation to fish labels. Concerning the fishery market potential in Tuscany, it is worth mentioning that the fishery business sector, for primary production, is strongly fragmented.

The small-scale fisheries is considered to be dispersed and vulnerable because of individualism as well as for the strong specialisation of the fishing activity related to the ecological characteristics of the fishing area. Also, there is a growing competition between small-scale and trawling fisheries both for resources and infrastructures. Furthermore, there is a rising competition from external and cheaper markets, such as import from foreign countries, as well as from Ligurian and Adriatic ports. The most capital intensive and structured fishery enterprises in Tuscany are increasingly supplying big retailers with own brands and labels – often referring to the regional and local context - which are the results of well rooted business-to-business interactions. Some labelling schemes are well-established marketing strategies for aquaculture producers which are historically characterised by more structured and capital-intensive business than the fishery sector. In addition to own local brands, some aquaculture firms adopted international sustainability labels (e.g. Friends of the sea) and others were involved in regional product labelling schemes (e.g. Slow Food Presidia). Both quality-labelling schemes, together with a strong and constant fish supply capacity as well as an historical capacity of creating partnerships between enterprises, allow Tuscan aquaculture producers to enter the big retailing system with medium-high price products.

Labelling schemes for local fish production. More specifically, from our empirical analysis on labelling schemes, different strategies were mapped for fresh and processed fisheries and aquaculture products from Tuscany. Such strategies were analysed as marketing business-to-business interactions that are recognisable through a tangible benchmark. The labelling schemes adopted to sell fish caught or farmed in Tuscany are mainly composed by own producers' brands and eco-labels. We observed that own brands can be implemented either by primary producers' organised groups or by wholesalers in coordination with big retailers through *domestic* quality conventions. Eco-labels can be adopted by producers' groups in coordination with NGOs and big retailers – through the implementation of *civic* quality conventions - and they are represented by certifications of sustainability and regional product labels. Big retailers are involved in all labelling schemes observed, both as coordinating actors and market target, while wholesalers participate only in territory-driven labelling schemes (Table 1).

Labelling scheme	Quality convention	Actors involved	Target market
Producers' own brands	Domestic	- Producers' organisation (<i>suppliers</i>) - Quality auditors (<i>for big retailers</i>)	- Big retailers - Wholesalers
Wholesalers' own brands	Domestic	- Wholesalers (<i>suppliers</i>) - Primary producers - Big retailers - Quality auditors	- Big retailers
Sustainability certifications	Civic	- NGO - Producers' organisation (<i>suppliers</i>) - Big retailers - Quality auditors	- Big retailers
Regional products	Civic	- NGO - Producers' organisation (<i>suppliers</i>) - Big retailers	- Big retailers

Table 1: Key features related to the labels adopted and associated quality conventions

Own brands. A number of labelling strategies were categorised as own brands for both aquaculture and fisheries production. An own private brand is an independent brand identifying the supplier and the geographical area of production. Own brands are implemented mainly by aquaculture producers (simple companies or producers' organisations), traditional lagoon fishers (joint in a cooperative), consortia of fishers and fishing cooperatives, as well as by fish wholesalers. All producers and wholesalers' brands are adopted for selling to retailers and bear information about geographical indication as well as the company's name (only for aquaculture and lagoon fisheries). Since the identity and quality of products is here ensured and "institutionalized" by their context-specific geographical origin, by long-term relationships between actors and by their acknowledged place in the local network - as well as by the company's private brands - such labelling strategy is identifiable within the *domestic conventions* (Boltanski and Thévenot, 1999; Ponte and Gibbon, 2005). However, the "domestic coordination" described by the adoption of own brands is reinforced by "market coordination", "industrial coordination" and "civic coordination" - depending on the market target, the characteristics of the supplier as well as on the typology of production. In fact, according to Boltanski and Thévenot's guide (1999), we can consider that market coordination coexists with domestic coordination since both fisheries and aquaculture products labelled with own brands are actually exchanged by the most important buyers (big retailers) and sellers of the regional market through competitive relationships. Also "industrial coordination" comes along with domestic coordination: according to convention theory (Sylvander, 1995; Boltanski and Thévenot, 1999; Renard, 2003), "industrial coordination" takes place when common norms and standards are objectively determined and measured through appropriate control processes and tools. In fact, in our case study, all aquaculture

companies and some marine fish suppliers sell their branded products to big retailers under request of standards (ISO) or other quality certifications, operated by third parties, to strengthen information and lessen uncertainty about their product quality. In other cases, own brands can certify an agreed internal protocol between the partners of the producer organisation (e.g. cooperatives, consortia, etc.) that guarantees the control of quality all over the production and retail process (see Box 1, for examples). Some of the abovementioned own brands are also reinforced through “civic-coordination” as it is described in the eco-labels’ subsection of this paper.

Box 1. Domestic convention-driven own-brands for primary products of fisheries and aquaculture in Tuscany

Producers’ own brands. Producers’ own brands for primary fish products in Tuscany relate mainly to business-intensive aquaculture - as well as traditional lagoon fisheries businesses - and are implemented for sales to wholesalers and retailers. Producers’ own brands are tangible benchmarks directly identifying the primary producers’ firm or organisation of firms (such as consortia) and express a domestic convention across the value chain from the upstream supplier level to the downstream consumer level. Suppliers identify their own products in a specific geographical context in which their reputation is acknowledged. They refer to this quality characteristics with retailers who, in turn, keep those tangible references to communicate the origin and quality of fish products to consumers. Especially for aquaculture, such domestic conventions are often reinforced through industrial coordination represented through the requirement of certifications (i.e. ISO) demanded by the retailers.

Wholesalers’ own brands. Wholesalers’ own brands for primary fish products in Tuscany relate mainly to spontaneous and independent initiatives of well-structured fishers and wholesalers, organised in different forms of coordination - such as consortium and cooperatives – in order to sell local fish to local big retailers. Two relevant examples of wholesalers’ own brands are represented by “Consorzio Ori del Mar Tirreno” - for sales to the retailer Conad - and “P.A.T. Pescato nell’Arcipelago Toscano” - for sales to the retailer Unicoop Firenze. The own brands are, in this case, expression of a domestic convention based on the geographic origin of the fish caught, on the reputation of the suppliers at a local level, as well as on their capacity to provide local and fresh fish, guaranteeing both quantity and the quality characteristics required by the retailers. In some particular cases, such as for “P.A.T. Pescato nell’Arcipelago Toscano”, the domestic convention is reinforced by an industrial coordination through the requirement of a quality and origin certification guaranteed by a third actor such as the independent certification body CSQA. In other cases, such as for the “Consorzio Ori del Mar Tirreno”, a product specification is agreed between supplier and retailer, with the supplier providing information and traceability about quality and origin of the fish supplied. For wholesalers’ own brands the label is a tangible benchmark applied across the value chain, characterising both the business-to-business coordination between supplier and retailer as well as the marketing communication with the consumers.

Eco-labels. Eco-labelling is basically a private, voluntary, market-based tool, complementary to public policy instruments, providing environmental information to products in order to influence market behaviour. These tools encourage the behavioural change of producers and consumers towards long-term sustainability and allow selecting products and services according to specific environmental and social criteria. In our case study analysis - according to de Haes et al.'s classification (2010) - we identified two eco-labelling schemes relating to sustainability certification of natural resources and to regional products: regional products stem from a well identifiable region which brings to many quality aspects as well as to a focus on gastronomy, traditional techniques and related employment (attention for the environment is more and more associated with regional products); sustainability certifications function now as marketing tools, protecting and improving the value of the brand or supermarket chain.

The adoption of eco-labels is an expression of *civic conventions*, rooted in collective solidarity and commitment to common social and environmental welfare - acknowledged and communicated through representative public agency. As for the aforementioned domestic conventions, also the civic conventions analysed in this case study are reinforced and interact with other forms of coordination depending on the supplier characteristics and on the buyers. The large production capacity of the suppliers adopting such eco-labels allows providing retailers with relevant quantities in the requested time frame; such “market coordination” is possible between acknowledged important actors (Boltanski and Thévenot, 1999) of the local market in a “deal-making” dynamic (Ponte, 2016). Furthermore, since certifications of sustainability for fisheries products (such as Marine Stewardship Council, Friends of the Sea, etc.) are tested through standardised methods and are requested by retailers together with standard certifications (e.g. ISO), “industrial coordination” is strongly associated with eco-labels adoption; in our case study, we observed that retailers brand eco-labelled fish products with their own quality labels, embedding the quality and sustainability of suppliers in their value chain (see Box 2, for examples). Furthermore, the adoption of sustainability certification is no more encouraged by NGOs and consumers; retailers and brand owners are now driving the demand for suppliers and producers in order to be certified (Foley and Havice, 2016). The main fishery eco-labels orient the supply dynamics offering a method to prove that products come from sustainably certified fisheries and producers (Konefal, 2012). In that, traceability represents a crucial factor for the success of eco-labels (Schmid and Connelly, 2009).

Box 2. Civic convention-driven eco-labels for primary products of fisheries and aquaculture in Tuscany

International sustainability certification (Friends of the sea). The adoption of international certifications of sustainability for fish products in Tuscany relates mainly to the “Friend of the Sea” scheme and, thus, to sales to big retailers. In our specific case, three primary producers’ firms joined in a consortium that adheres (through certification) to the sustainable production practices required by the NGO responsible for the certification scheme (Friend of the Sea). Then, retailers require that local suppliers (in this case the primary producers’ consortium) provide “sustainably” certified products and, in parallel, ask producers for controlling the product quality through certified audits. Afterwards, retailers involve these certified fisheries products in their range of “quality controlled products”, embedding the quality and sustainability of suppliers in their value chain. In this case the “Friends of the Sea” label remains a “marketing business-to-business tool” – i.e. the expression of a civic convention between supplier and producer – that is not explicitly translated to final consumers. The information transferred to consumers is rather guaranteed by the retailers and involve a number of implicit principles and beliefs characterising the interactions between suppliers, NGO and retailers, that in turn are reinforced by industrial relationships (e.g. auditing, biological and chemical controls, adoption of ISO standards).

Regional product labels (Slow Food Presidia). Slow Food Presidia for fish products in Tuscany relate mainly to small-scale and traditional lagoon fisheries. In particular, a cooperative - composed of 48 lagoon fishers - adopted three different Slow Food Presidia. A number of specific products of the cooperative are required by the NGO (Slow Food) to comply with particular traditional and sustainable production practices (building on an agreed product specification). The cooperative supplies with these labelled products only specific retailers that acknowledge and demand for their labelled products (e.g. Eataly, Coop Italia, Conad). The Slow Food Presidia label is adopted by the cooperative and characterises the institutional agreement the cooperative ties with the retailers that contributed to the constitution of the label (Coop Italia) as well as with those who explicitly support traditional and local food systems (Eataly). In this case the Slow Food label does not represent only a marketing tool of a business-to-business coordination, but it also constitutes a tangible benchmark – visible to consumers - defining the shared convention between actors from the upstream to the downstream, thus including the primary producers joint in the cooperative, the NGO, and the retailers.

Discussion and conclusions

According to Marion (2003), conventions are accepted and shared social constructs that allow coping against uncertainties. They qualify and define the attributes of a product. Conventions represent an information system that constantly and coherently guarantees actors about the behaviour of the other participants in the convention itself. Actors, such as suppliers

and buyers, adopt a convention since they are convinced by its principles: this is how a quality convention can be successful. Thus, quality is the result of collective socio-economic interactions between the actors involved in an exchange and the related convention informs participants about the attributes of a product, the principles, the shared convictions as well as on the rules justifying their choices for participating in that convention. As a social construct, a convention limits uncertainties on products and guarantees its functioning not only through a shared acceptance but also through tangible benchmarks (Marion, 2003). Tangible references - such as labels for fisheries and aquaculture products, in our specific case - represent the principles through which it is possible to identify a specific business-to-business convention between primary producers and buyers. Thus, the convention theory approach provides a perspective for a socio-economic interpretation of the interactions between actors that goes beyond contract theories, highlighting the relevance of actors' beliefs and principles in order to study emerging and changing economic and market forms of coordination (Gomez, 2003).

Aiming at providing local policies with insights regarding the fish labels' governance, a number of private quality labels for local primary products of fisheries and aquaculture in Tuscany were observed and mapped to explore the conventions embedded upstream and characterising the business-to-business relationships between suppliers and retailers. From this theoretical and empirical case study analysis we observed how sustainability certifications and regional product eco-labels function as business strategic tools for conventional marketing to compete in large-scale retailing, reducing uncertainties between actors and targeting medium-high prices. Besides eco-labelling, firms implement own-labelling strategies building mainly on the territorial context characteristics and on reputation. The coexistence of different forms of coordination at the same time - depending on the end-market and the exchange partners - confirms previous and acknowledged findings from convention theory (Ponte and Gibbon, 2005). In particular both civic and domestic conventions – as in previous fundamental examples (i.e. Thévenot, 1995; Ponte, 2016) - are embedded in market-industrial compromises. From a supplier point of view, these coordination coexistences and compromises - together with the inclusion of external actors (e.g. external parties, NGOs, auditors) - are considered key for guaranteeing a qualitatively and quantitatively appropriate supply to big retailers. On the other hand, some authors highlight how the reinforcement through an industrial convention can finally endorse and sustain civic elements (Riisgaard and Gibbon, 2014; Ponte, 2016).

From our results we aim at identifying some key issues to consider for delivering policy lines about labelling schemes and voluntary certifications for fisheries and aquaculture products of Tuscany. The convention theory approach highlights the relevance of a selective phase that actors have to come through for interacting within a specific convention, as well as the importance of the benchmarks, through labelling, in reinforcing the principles of a convention and reducing uncertainties through the value chain. Then, each convention is characterised by specific competences, interpersonal contacts, personal acknowledgment between actors, specific places for business activity, decision-making and interactions (Marion, 2003).

Lessons learnt.

- Before implementing new fish labels at a regional level it is worth considering the central role played by big retailers in vertical coordination with suppliers for adopting quality labels and distributing labelled products. In our case study, quality-labelling schemes are, in fact, managed by non-state actors and both suppliers and retailers bear transaction costs in order to lessen information asymmetries within the value chain and improve quality knowledge for consumers. Generally, guaranteeing and providing food quality information is an inherently costly activity for suppliers (Antle, 2001). Also, new tangible marketing tools such as labels need to be conceived as pertinent expressions of a business-to-business convention, not only for targeting final consumers.
- The main labelling efforts observed are oriented to reduce uncertainties and improve information on sustainable practices and local fish production that can be deemed as relevant opportunities for a new quality scheme. However, such organisation implies a well-established qualitative and quantitative coordination between actors building on industrial approaches – such as quality and traceability controls - for responding to the retailing demand of labelled products with appropriate quantity in limited time. An additional labelling and certification scheme would imply further investment and transaction costs (Banterle and Stranieri, 2008) as well as rearrangement of inter-firm coordination, cooperation, trust and fidelity, as well as the capacity of building a new quality convention made of shared principles. Furthermore, for product procurement retailers refer to particular lists of suppliers that are difficult to integrate especially for fishers who are not belonging to an acknowledged group of producers.
- Innovations in marketing are rather the result of collective and iterative works obtained through a combination of traditions and previous practices, often inherited by previous collective experiences. A new marketable element is often the outcome of a shared socio-technical context always inspired by a previous experience (Marion, 2003). Thus, beyond proposing new labels, public policies (aimed at generating and capturing value added for fisheries and aquaculture primary producers) could encourage local producers to join existing labelling schemes. Also, it was observed that label adoptions stem from business environment characterised by forms of horizontal coordination, such as cooperatives and consortia, and vertical integration. Thus, since the adoption of quality labels is currently possible only for a reduced number of producers it could be fostered not only through supporting investments in technical and marketing training, but also through enhancing the coordination and cooperation capacity of producers within the value chain.
- Furthermore, since our analysis highlighted that labelling-schemes are adopted only by well-structured and organised producers, improving infrastructures and logistics for the fisheries and aquaculture sector in Tuscany could contribute to reduce transaction costs, to avoid uncertainties through the value chain and to help coordination and cooperation between actors of the value chain.

In conclusion, this exploratory and qualitative research is limited to a geographical region while it may be interesting to carry out a comparative analysis with other areas of the country

to allow a broader understanding of challenges and opportunities for fisheries and aquaculture labelling schemes and related institutional arrangements.

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