

THE ITALIAN SOUNDING PHENOMENON: THE CASE OF GERMANY

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Abstract

The main objective of this paper is to consider the role of Made in Italy in foreign markets, especially in the German one. The focus is on the Italian Sounding phenomenon, which is mainly affecting the Italian food sector. To deeply understand this phenomenon and its consequences, an online survey has been carried out in Germany. By analyzing results, the fact that consumers do not pay attention to the label while purchasing has been confirmed. In this way, the strategy of Italian Sounding damages both the perception of Made in Italy goods and the whole Italian economy. For those reasons, the Italian Sounding should be minimized by using specific marketing activities, until consumers understand the real quality of the authentic Made in Italy.

Keywords: Italian Sounding; Made in Italy, Country of Origin, Germany.

JEL Classification: M3

1. Introduction

In recent years, attention has increasingly been drawn on the origin of goods, especially in the food sector, driving consumers' choices while purchasing. Among many parameters to consider, it is important to mention extrinsic factors like country of origin, used by consumers to evaluate products. In brief, in respect of other studies and the literature, the country of origin is usually abbreviated as "COO", which refers to the country that manufactures, designs or assembles a product or brand with which it is associated (Lee & Lee, 2009). The country of origin effect has indeed a strong impact on purchasing decisions.

A particular aspect related to COO is the Italian Sounding phenomenon, which consists in exploiting names, colours and images to imitate real Italian products, but having nothing to do with the original Made in Italy quality, culture and tradition. The implementation of the sounding strategy constitutes a threat not only to the Italian exporting companies but also to consumers: damages are caused to Italian producers by references being made to well-known

Italian brands or by the use of specific wordings which give the impression that a product is Italian when it is not, thus misleading consumers. Italian Sounding is a tangled issue, especially because nowadays global sourcing is a common practice: supply chains are frequently spread across countries, thus, determine the true Country of Origin (COO) of a product is more complicated than before. Interestingly, some authors precisely suggest that companies located in countries that do not benefit from a positive country image, can take advantage of the positive perception associated to another nation (Zeugner-Roth, Diamantopoulos & Montesino, 2008). The present paper is meant to provide an overview of the positioning of the Made in Italy in foreign markets, through the analysis of the consequences of the so-called Italian Sounding phenomenon. Starting from a literature review concerning the COO effect, the paper will provide a deepening in the Italian Sounding phenomenon. Moreover, an online survey has been carried out in Germany, and people have answered questions regarding their behavior in supermarkets and their expectations about Made in Italy goods. Feedbacks and data from German consumers have been considered to better analyse the Italian Sounding phenomenon, evaluating both risks and opportunities.

2. Literature review

2.1. Country of Origin

COO has been defined by Nagashima (1970) as the picture, reputation or the stereotype that businesspersons or consumers attach to products of a specific country. In addition, country image is one of the first variables that researchers test in accordance to foreign product and carry on in international business and consumer behavior studies (Kotler, 2011).

Moreover, it is highlighted how the image of the country of origin is affected by national characteristics, as well as the economic and political background, the history and tradition of the country. According to Papadouloulus and Louis (1993) this principle is the result of the perceived national identification or affiliation of a product by consumers regardless of any explicit or implicit and real or false claims inherent in the product or its associated promotion. The COO of a good or service is simply whatever a consumer perceives it to be. Moreover, the COO serves as an indirect indicator of the product quality, as it attests benefits and performances, ensuring costumers expectations.

Therefore, information relating to the origin of products plays a crucial role in developing positive or negative prejudices on goods, driving consumers purchasing choices (Bursi et al., 2012). The COO effect can have a positive or negative impact on customer intention, per every effect that the country of manufacture has on the perception of the buyers (Thakor and Lavack, 2003). As claimed by some academics, if the image of a country is perceived in a positive way from the target, a company can take advantage of this situation, using the image as a mean to add value to the product in the commercialization phase (Speece & Nguyen, 2005). Therefore, information concerning products' origin influence the purchasing decision: the COO undertakes a prominent role and for this reason, companies should consider consumers' perceptions in developing marketing activities.

Another important factor to consider is the push towards globalization, which is not affecting the prominent position of COO, as the territorial identity acts as an intrinsic factor, enlarging or diminishing the product value. As Nardin (2012) states, COO is an important informative factor, as territories became a symbol of identity in a globalized market. Globalization does not flatter, but indicates a degree of difference among products instead. Thus, the origin became a quality mark, which represents all the companies operating in the same territory.

The so-called Halo effect takes place when consumers evaluate a country's unfamiliar product using their perceived country image that is based on whatever knowledge they have about the country itself (Bertoli & Resciniti, 2012). The halo effect is therefore a concern of great importance, especially for Italian Small and Medium-Sized Enterprises (SMEs) which have limited resources and competences to set appropriate communication policies to reach foreign markets; on the other hand, they can take advantage of the origin of products to better communicate the quality and reliability level, differentiating their products in globalized markets.

2.2. Made in Italy

Italian products have gained a widely-recognized reputation over the years, which made it possible to obtain a commercial advantage to Made in Italy products. In general, Italian products are characterized by a high creative content of the industrial process, validating the term "Italian style". To the Made in Italy concept are related the sensory experiences of consumers, as well as common stereotypes of the COO, which significantly affect the consumers' decision making process (Dona, 2009).

Moreover, the Italian specialization in food, furniture and clothing sectors have reached high standards all over the world. These specific skills are considered as core competences of Made in Italy, even more than technical qualities and technological performances (Guerini & Uslenghi, 2006). It is therefore possible to state that COO exerts a special influence on consumers when referring to specific sectors.

The problem arises, and indeed exists, for small business which are affected by legislation: on one hand, large business groups save money by outsourcing certain production steps; on the other hand, small businesses produce entirely on the Italian market, affording high costs for maintenance and labor. SMEs are indeed overpowered by large business groups which can cope with the present economic situation, granting a competitive price but providing the same quality standards as the one of SMEs. However, the halo effect helps SMEs to be competitive as much as multinationals and in building relations with foreign markets.

2.3. Italian Sounding

The Chamber of Commerce of Parma (Magagnoli, 2013) defined Italian sounding as a phenomenon based on the capability of offering products with Italian features, regardless of quality, taste and place of production. In addition, Magagnoli (2013) stressed the fact that it is important to distinguish Italian sounding from counterfeiting, which is legally enforceable and it consists in illegal imitations of brands and designs identified as Italian products but effectively produced in other countries. Moreover, the possibility of legally pursuing these actions considering the Italian Sounding is often precluded. Foreign companies adopting the sounding strategy misuse distinguishing signs and informative descriptions which lead to the Italian country, using market techniques that can mislead consumers, competing in an unfair way in the market, gaining a competitive advantage with respect to the whole competition. This especially happens in product categories where a country excels in expertise and traditions, as the Italian agri-food products.

The sounding strategy can allow firms to meet the demand, guaranteeing high profits and it is in fact used when importing an original product which is too expensive and therefore not competitive. On this respect, Coldiretti (2014) underlines that the common denominator in cases of counterfeiting and imitation is the opportunity for a foreign company to obtain in its reference market a competitive advantage by unduly associating the image of Made in Italy to its products, having no real connections to the Italian productive system and competing in an unfair way with Italian producers, who are committed to ensuring high quality standards.

In respect of this phenomenon it is considered appropriate to specify three different imitation categories. The first one is referred to the use of non-registered Italian recipes: it should be made clear to consumers that specific wordings on the label such as “Bolognese sauce” are just a reference to the Italian country and not a real Italian product. Although the use of even real Italian recipes may not be prohibited, it represents a useful mean for the enhancement of real Italian products. The second category is related to markings which induce the idea of Italy, such as the Italian tricolor, pictures of locations and famous monuments. The last one concerns the use of Italian names and surnames addressed to both products and brands, aiming to recall the Italian country (Canali, 2013).

The implementation of the above-mentioned practices is a clear herd behavior and an abusive use of the Italian products’ reputation that misleads consumers. Consequently, this information asymmetry represents an opportunity for companies to modify their supply strategies, addressing their offer to foreign markets and not to the domestic one, because they are prompted by the need of cutting production costs. This is therefore a risk both for the agricultural Italian sector (in economic and employment terms) and for consumers who based their purchasing choice on prices because they are not able to distinguish between a real Italian product and a fake one.

If on one hand a legislation to protect intellectual property and Trade Dress exists, it is impossible on the other hand to have a law in a wider sense: if a single producer can register its brand, packaging or design in more than one country, nothing can be done when the same brand is implied in another country to represent another product category, or in the case where a competitor produces a given good using a similar name.

The term Trade dress refers to the overall commercial image of a product that indicates or identifies the source of the product and distinguishes it from those of others. It may include the design or configuration of a product, product labeling and packaging and even the décor or environment in which services are provided. Moreover, Trade dress can consist of elements such as size, shape, color and texture, to the extent that such elements are not functional. If a competitor markets a product with a packaging that is similar to the original one, the recourse to trademark legislation is necessary.

The Italian Chamber of Commerce for Germany presented a statement describing different criteria for Italian sounding judgement: fake designation of origin is an element that is sufficient to lead the court to issue a measure against the producer, whereas elements such as fake Italian recipes, Italian tricolor, packaging with typical Italian images, names or specific Italian wordings are judged in different ways, depending on the situation; the thing that matters the most is the general impression created in consumers’ mind by the packaging of a given good.

2.3.1. Market data

The Chamber of Commerce of Parma indicates that, despite the economic crisis, in 2013 Made in Italy food products represent one of the major contribution to the total national export (7%). Three years later, in 2016, the agri-food exports continue to be one of the most dynamic components of the Italian economy, reaching for value 9% of the total exports, as stated Iotti (2016).

However, this data cannot be considered positive if compared to the total annual turnover of products sold through the sounding strategy. According to data gathered in 2012 by Federalimentare (the Italian food industry Federation), market share of Italian sounding deduction from Italian industry is estimated at around 61 billion euro per year. This phenomenon assumes a great importance at world level, especially in Europe and North America, where the 97% of pasta-sauces are imitations of Italian products; moreover, Nomisma

(2015) stated that in USA, for each dollar earned by real Italian products, 11 dollars are earned thanks to imitative goods.

If on one hand data confirmed a huge appreciation of Made in Italy food, on the other hand there is a great potential for Italian export expansion. As the myth of Made in Italy food is everyday more rooted abroad, foreign producers attempt to implement the sounding strategy, causing high risks for Italian production; related to this trend, Coldiretti reported that now two out of three products sold in the international market are fake products.

2.3.2. Solutions

The Ministry of Italian economic development reported some solutions that have been implemented to contrast the Italian sounding phenomenon: the DGLC-UIBM, in collaboration with Federalimentare, was concerned in the period 2011 - 2013 with two projects: the first one began in June 2011, directed at Canada on the occasion of Italy's taking part in the "SIAL" show in Toronto. This project aimed at promoting and enhancing the products of the agri-food supply chain of Italian origin, educating the end consumer to recognize the origin and the difference in quality of the Italian product, carrying out promotional activities at the outlets of the mass retailers and a publicity campaign in the principal cities: Montreal and Toronto.

The second project, which was motivated by the positive experience in Canada, was carried out in Russia in 2013. The choice of Russia derived from the market's growing interest in the Italian food industry, arising from the increasing appreciation by Russian consumers of the quality of Italian products. On this occasion, as well as promoting the image of original Italian products, information seminars were held by the most famous chefs from Italian restaurants in Moscow, in order to educate the Russian consumer, with the intention of fighting back against the imitation of Italian food products.

Moreover, custom and excise agency, together with Coldiretti carried out the "Falstaff project" whose objective was to inform the young target about dangers arising from the purchase of non-compliant products, which are a real threat for both health and safety of consumers.

The "Food Act" project, promoted and advanced by the Italian government, is part of the legacy left behind by Expo Milan 2015. As well as above-mentioned projects, also in this case the aim is to promote "Made in Italy" and increase the level of quality of Italian cuisine abroad, through the Italian know-how in the food sector. It must be mentioned that, according to Gentiloni (2016), exports in the Agri-Food sector are worth about €37 billion per year and that this number is bound to increase thanks to the effort spent by the Italian Ministries of Agricultural Policy and Economic Development through the Plan for the Extra-Ordinary promotion of Made in Italy.

One of the most complete solution is the one proposed by Federalimentare (2012) composed by the following issues: the strengthening of legislative instruments worldwide, the reintroduction of anti-counterfeiting desks in countries where the phenomenon is more widespread, the implementation of products protection clauses in bilateral free trade agreements, the strengthening of relations with foreign markets through participation in fairs and the realization of informative social campaigns to better communicate the high value of real Italian products, in order to educate the end consumer. Regarding counterfeiting, Iotti (2016) reported what the President of Federalimentare Luigi Scordamaglia argued, in other words, the goal is not only to sell products, but also to stress the importance of Italian history, values, know-how, tradition as well as the increasing innovation and advanced technology behind real Italian products.

Another corrective action carried out by the Italian government is the Plan for Made in Italy Promotion, which aims to inform and promote Italian productive system abroad, to reinforce

italian products identity all over the world. In addition, a successful example is the association of Italia Del Gusto: as Volpe (2015), the Italian general manager explained, manufacturers of various product categories have decided to get together and present a united front to reach foreign markets.

Despite all these actions, it must be clear that the abolition of the Italian sounding does not automatically imply an increase in export sales: on this purpose, Nomisma (2015) argued that as the Italian business fabric is mostly composed by SMEs which struggle to export, it is in any case difficult to face the global market. For this reason, the main solution needed is to act on both fronts: the dimensional growth of enterprises and their commercial aggregation on one side, and trademark protection and tariff barriers limiting Italian export on the other.

Positive results came from Auricchio, an Italian company that implement a three-key point's strategy to increase revenue abroad. The CEO of the company explained during an interview (2015) that the strategy consisted in acquiring local importers and other companies in order to broaden the offer, fighting Italian sounding and realizing a Made in Italy system. In this perspective, the dairy sector, the company acquired its importer in the United States in 2015, as the American market accounts for a fifth of its turnover, supporting distributor with domestic staff. However, these operations are not implementable everywhere for economic reasons.

3. Research methodology

3.1. Market selection

With regard to Ismea and Cogea-Databank (2005) analysis relative to Made in Italy positioning in foreign markets, it has been highlighted how Italian agri-food is positioned as up-market products. The strength points of Made in Italy are related to both organoleptic quality and aspects concerning the public imagination, thus the country of origin effect. On the other hand, the only weakness identified is the high price of goods.

According to Istat data of 2007, Germany turns out to be the first importer of Italian products at World level, with 14.8% of Italian export shares.

According to Federalimentare (2015), in 2014 Germany has been confirmed as the major target market for Italian export concerning the agri-food sector, as well as in 2015, with a share of 19,1% with respect to other target markets, as reported by Istat (2016).

With particular reference to the product "pasta", Italy is the leader in terms of sales in Germany, well above the average of other countries; same results are reported for fruits and vegetables. Moreover, German agents ascribe a prominent role both to notoriety and price: brand reputation is the most important element in the decision-making process, immediately followed by the price. As data shows, the German market is characterized by a strong presence of Made in Italy products, appreciated for their quality, origin and brands notoriety (Ismea and Cogea-Databank, 2005).

Made in Italy export of agri-food is one of the main component affecting the Italian balance of trade in a positively way. However, it is from this huge economic value that imitation and counterfeiting problems arise; foreign producers try to take advantage of this situation and of the great appeal Italian products exert on consumers, making quick profits.

3.2. Data collection

The Italian origin represents a strong incentive to buy for a German consumer, but this is not reflected in supermarkets where it is common to find imitation of Italian products. On this respect, the Italian Chamber of Commerce for Germany explained that in Germany, unlike other countries, the protection against counterfeit constitutes exclusively a tort, meaning that there is

no intervention of public authorities. So, the Italian producer is asked for individual activity for the involvement of the German producer in the proceedings; on the contrary, if the same situation occurs in Italy there is the possibility of Antitrust intervention.

To better understand the Italian sounding phenomenon in the German market an online survey was carried out. The main objective of the research was to identify how the sounding strategy affects the market and if consumers are aware of it. Respondents indicated their perceptions about Made in Italy and their purchasing behaviors in supermarkets. Moreover, the research allowed to detect the work of associations for the safeguard of both consumers and companies settled in the considered territory.

The questionnaire was divided into four parts: personal data, image of Italy and its products, evaluation of Italian products and Italian sounding phenomenon.

The final sample consisted in 118 persons, 36 men and 82 women, aged from 15 and 72 years old, mostly single. In addition, 80% of the sample identified its tax bracket between 0 – 20,000 euros per year. Finally, 105 persons out of 118 have been at least one time in Italy.

4. Results and discussion

The first relevant results showed the Made in Italy consideration and the relative impact it has on the decision-making process in supermarkets, with particular reference to agri-food products. Respondents were asked to use a five point Likert Scale, where 1 indicated “not at all” and 5 “a lot”.

With reference to Table 1, it is clear the positive way in which products are considered: the mean of values assigned to certain characteristics was between 3 and 4 points out of 5.

By analyzing results, respondents gave positive values to the above-mentioned characteristics: in particular, the technological and innovative level of Italian products is considered to be quite high, with a medium score of 3.04 and 2.97 out of 5. Moreover, German consumers identified Made in Italy as an exclusive feature: 63.6% assigned 3 points and 16.1% assigned 4 points out of 5. The highest medium value goes on the adjective “reliable”, with a medium score of 3.14 out of 5 points.

Table 1 – Made in Italy products: characteristics

Question	Score					Avg value
	1	2	3	4	5	
Italian products are:						
Technologically advanced	1.7%	19.5%	51.7%	27.1%	0.0%	3.04
Innovative	3.4%	24.6%	47.5%	20.3%	4.2%	2.97
Reliable	4.2%	16.1%	43.2%	33.9%	2.5%	3.14
Exclusive	3.4%	10.2%	63.6%	16.1%	6.8%	3.13

Moreover, positive values were assigned to the quality of Made in Italy products: the 55.1% of respondents evaluate them as “high quality”; this issue is connected to the one relative to the price of Italian goods, considered “very expensive” from the 47.5%. These data show the up-market positioning of Made in Italy, that can be considered as a niche product if compared to the low prices of sounding goods.

A key point is represented by the same evaluation on price that has been made by respondents identified in the upper income brackets, meaning that Italian products are characterized by high prices for all the population.

As concerns the brand notoriety, even if not in line with the wide spreading sounding phenomenon, the 75% can identify real Italian brands in supermarkets, meaning that Italian SMEs have effectively gained foothold on the German market.

Finally, consumers have been questioned about which Italian products they buy, considering different sectors: results show that food is what they associate and buy the most, followed by clothing, cosmetics and electronic products. Relevant data gathered in the third part of the survey concerned the evaluation of Italian products (Table 2). Positive values have been assigned to Italian products, with a medium value of 3.85, which are considered to be definitely better than the German ones by 33.1% of respondents. However, consumers would not pay a premium price for real Italian pasta: all consumers assigned values between 1 and 2 points out of 5 to this question. The reason behind this result could be ascribed to the high prices of Made in Italy products, respondents may not want to pay a lot for essential goods.

Table 2 – Made in Italy products: evaluation

Questions	Score					Avg value
	1	2	3	4	5	
1) Do you assign positive value to Italian products?	0.8%	1.7%	26.3%	54.2%	16.9%	3.85
2) Do you consider Italian food to be better than the German food?	2.5%	4.2%	23.7%	36.4%	33.1%	3.93
3) Do you feel like an Italian person when you eat pasta?	8.5%	9.3%	38.1%	26.3%	17.8%	3.36
4) Would you pay more to have a real Italian pasta package?	56.8%	43.2%	0.0%	0.0%	0.0%	1.43

The last part of the questionnaire referred specifically to the Italian sounding phenomenon: results highlighted the fact that German consumers did not always check the label to understand the real origin of goods. Therefore, if the brand is not known and the origin is not checked, the possibility to be misled by the packaging is considerably high, in addition if the variable of the price is considered in the decision-making process, the possibility of buying a sounding product is even higher. Thus, 65% of respondents confirmed that they have involuntarily bought a sounding product at least one time.

The products affected by the Italian sounding strategy the most are pasta, cheese and sauces. Moreover, to confirm the results of the previous parts, it has been asked which are the features that characterized the most Made in Italy goods and once again the 60.1% identify Italian product as high-quality, with high price (36.5%) and safe (3.4%).

In the last part of the questionnaire there were two images of sounding products marketed in Germany, and people were supposed to recognize the real origin. Both brands implement the Italian sounding strategy but results are slightly different.

Regarding the first figure, it is possible to say that the reason behind the fact that fewer people than expected have been misled by the strategy is the brand notoriety. However, 24%

did not recognize the real German origin, because of the presence of specific wordings, colors and other elements related to the sounding strategy.

The first element to consider is the name, which is typical Italian and captions state “the original” as well as “with original dressing”. Moreover, the Italian flag is well visible on the packaging.

The production site and a caption stating “inspired by the Italian recipe” are written with a small font on one side of the package. The intent of the German producer is therefore clear to imitate a real Italian product, so that more hasty consumers will buy the product expecting to find characteristics reported on the packaging.

The second image is a sounding product but in this case the brand is not known and therefore the 52% of respondents believed this product as a real Italian, as it is a glaring example of the implementation of the Italian sounding strategy. Also in this case, there are evident references to the Italian country, as the tricolor, the Italian name and a caption stating “authentic Italian”.

5. Conclusions, limitations and future research directions

The Italian sounding phenomenon is based on the sounding strategy which implies as key points a low price and Italian graphic elements misleading consumers (Dona, 2009), and it can be described as a way of counterfeiting products as it consists in giving Italian features to food products that are not truly Italian (Cembalo, Cicia, Del Giudice, Scarpa & Tagliaferro, 2008).

There is a market share where the demand is not completely met, therefore foreign producers take advantage of this situation to attract the attention on sounding products, which apparently have the same characteristic of Italian goods but with a lower price.

The situation is difficult to resolve, but asking for intervention on some points, such as the removal of the Italian flag from cheeses, as well as to veto the use of any graphics on the packaging that recall Italian country. The Italian sounding is also due to wrong strategies made in the past, focused on export ‘second choice’ products. Today it is not so: the best products are exported, because to succeed abroad the main way is to focus on excellence.

Another important issue is to offer a full range of products, because a company that has a large range is more credible in the eyes of the foreign customer.

According to Link (2016), Italy has set itself the ambitious goal to increase Agri-food product export to 50 billion euros by 2020, representing a potential benefit not only for Italian products consumers, but also for import and distributing companies. As Link (2016) explained, there is concrete commitment of the Italian Government, which in the 2015 budget law provided a significant allocation of 220 million euros related to the propagation of “Made in Italy”. In particular, the Italian investment aims to focus on high-potential geographic markets, USA and Canada in the first place; to activate promotional campaigns intended to influence opinion leaders and to involve importers and large retail chains and support SMEs that often lack in skills and resources to soundly access foreign markets. Italian companies should therefore organize themselves in order to grab every opportunity that foreign markets offer and that the huge turnover of Italian sounding seems to testify.

Data gathered through the survey conducted on the German market showed how the phenomenon acts, and also the way in which Italian producers lose their potential market shares. The studied phenomenon confirmed that the real Made in Italy agri-food sector can be wider than it is now, and potential market shares stolen by sounding products could have a great impact on the total Italian export, affecting Italian economy positively.

The United States, Canada and Mexico are the biggest consumers of products made locally but carrying Italian-sounding names. But the phenomenon is also growing in crisis-hit Europe, where local consumers spend a total €21 billion per year on fake cheap food against €13 billion

on original Italian cheese, pasta sauce and other popular meals, according to figures by agriculture and food organization Coldiretti. Italy sought support from several countries ahead of a possible international agreement discussed during Expo 2015. But some countries have been reluctant to agree on such a delicate issue, which raises protectionist fears and affects domestic economic interests.

COO food labelling is also one of the contentious issues at the heart of negotiations for an ambitious bilateral free trade deal between EU and the US, also known as Transatlantic Trade and Investment Partnership, but US has not yet formally agreed to his proposal to create a common front against fake food, as reported Lombardy region governor Maroni in 2014 during an interview.

Latest data exposed by Cavestri (2017) show that in total, the “Made in Italy” sector in the US is worth €40 billion, up 10.5% compared to €36 billion in 2015. Meanwhile in 2014 Italian exports were close to €30 billion, up 10% compared to 2013. This was a progression that analysts had forecast also for 2017-2019 (with an annual increase of more than 7%). According to Italian food sector association Federalimentare, of more than €38.4 billion of food and farming exports in the world, Italy sells €3.8 billion in the US. Even though an agreement has not been reached yet, looking at the list of the roughly 90 products on which the US administration could impose tariffs up to 100%, more than 75 are food-related products.

The Italian sounding should be minimized through information and education campaigns, marketing activities aimed at promoting the real Italian quality, know-how and tradition, in order to be fully appreciated and recognized all over the world.

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