Citation: G. Cusimano, S. Cannizzaro, M. Giannone, D. Privitera (2020). Retail in Sicily: an Overall View. *Bollettino della Società Geografica Italiana* serie 14, 3 Special Issue: 155-164. doi: 10.36253/bsgi-1002

Copyright: ©2020 G. Cusimano, S. Cannizzaro, M. Giannone, D. Privitera This is an open access, peer-reviewed article published by Firenze University Press (<http://www.fupress.com/bsgi>) and distributed under the terms of the Creative Commons Attribution License, which permits unrestricted use, distribution, and reproduction in any medium, provided the original author and source are credited.

Data Availability Statement: All relevant data are within the paper and its Supporting Information files.

Competing Interests: The Author(s) declare(s) no conflict of interest.

For Italian evaluation purposes: This paper is the result of a joint reflection by the authors, who collectively contributed to its drafting. However, section 4 is to be attributed to Salvo Cannizzaro.

Retail in Sicily: an Overall View

Il commercio in Sicilia: uno sguardo d'insieme

GIROLAMO CUSIMANO¹, SALVATORE CANNIZZARO², MAURIZIO GIANNONE³, DONATELLA PRIVITERA⁴

¹ Dipartimento di Culture e Società, Università di Palermo, Italy

² Dipartimento di Scienze Umanistiche, Università di Catania, Italy

³ Dipartimento di Scienze Economiche, Aziendali e Statistiche, Università di Palermo, Italy

⁴ Dipartimento di Scienze della Formazione, Università di Catania, Italy

E-mail: girolamo.cusimano@unipa.it; scanniz@unict.it; maurizio.giannone@unpa.it; donatella.privitera@unict.it

Abstract. In Sicily, the retail sector shows changes both from a structural point of view, with an increase in large-scale distribution at the expense of small businesses, and spatially, through the transfer of many commercial activities to the suburbs of cities or to extra-urban areas. This is a phenomenon that can also be observed in the rest of the country. The analysis of the most recent statistics in the sector, however, seems to highlight a significant flexibility of a part of the fabric of Sicilian commercial enterprises due to the widespread presence of small commercial businesses on the regional territory.

Keywords: large-scale organized distribution, suburbs, localization, micro-enterprises, flexibility.

Riassunto. In Sicilia il settore del commercio mostra cambiamenti sia dal punto di vista strutturale, con un incremento della grande distribuzione a scapito dei piccoli esercizi, che spaziale, attraverso il trasferimento di molte attività commerciali nelle periferie delle città o in aree extraurbane. Si tratta di un fenomeno che è possibile osservare anche nel resto del Paese. L'analisi delle più recenti statistiche del settore sembra tuttavia evidenziare una significativa flessibilità di una parte del tessuto di imprese commerciali siciliane dovuta alla presenza diffusa sul territorio regionale di piccoli esercizi commerciali.

Parole chiave: Grande distribuzione organizzata, periferie, localizzazione, microimprese, flessibilità.

1. Introduction

The retail sector in Sicily has suffered the negative impact caused by the economic crisis of 2008. The effects of that crisis have contributed to further weaken the local business commercial community, which is already in a state

of difficulty due to a structural condition of organizational and economical deficit.

In Sicily, as in many other parts of Southern Italy, the organizational downsizing of the retail sector is also associated with a change in the spatial distribution of the points of sale. The phenomenon affects historic centres and the downtowns, where a progressive reduction of little shops can be observed, as well as the peripheral areas of urban centres, spaces preferred by the large-scale distribution.

To describe the current trend and to try to analyse some effects caused on the regional and local commercial system by the current organizational changes, this paper has managed the most up-to-date sector statistics. The data, drawn from research institutes and national administrations as well as from the Sicilian Region, are read trying to bring out some emerging dynamics and to interpret the macro-trends through an overview of the most recent information regarding the actual consistency and the spatial distribution of some retail business categories. The quantitative approach is therefore intertwined with a qualitative analysis of the information collected, proposing an interpretation of phenomena still in progress which, for this reason, here are focused outlining possible trend lines that can be further explored when consolidated statistical data will be available.

2. The trend of retail in Sicily: an economic and territorial framework

The commerce sector has certainly played a relevant role in the Sicilian economy. According to the Bank of Italy, in 2016 – year which the latest available territorial accounting data refer to – the retail sector affected the formation of added value in Sicily for a significant 12.3%, a percentage however in line with the national average (Banca d'Italia 2019). The economies of Sicily and, more generally, of the South (Mezzogiorno), as it is known, their structural bases rest largely on the traditional tertiary sector. In 2018, the added value of the services sector, within which retail falls, accounted for almost 83% of the total in Sicily, more than 79% in the South and 74% in Italy (Studi e Ricerche per il Mezzogiorno 2020). It should therefore come as no surprise that the fabric of small commercial enterprises has been able to hold up on the island and in the south of the country, albeit with great difficulties, to the effects of the post-2008 economic shock. This is demonstrated by the gradual increase in employment in the service sector in the decade following the 2008 crisis, unlike in other sectors (ISTAT 2018), and by the fact that in 2018 the bal-

ance between registrations and business closures was positive precisely in the south, with a performance, that alone was worth 60% of the increase recorded in that year at national level (Ministero dello Sviluppo Economico 2018).

However, it can be assumed that even in Sicily there is a tendency to downsize the consistency of the sales networks. The signs of a structural weakening are also registered in terms of economic productivity, as shown by a survey carried out in Sicily by Cerved Group for the period 2004-2017, on a sample of about 3.500 stock companies active in the retail, which shows a progressive decrease in the operating profitability of the companies in the sector (Banca d'Italia 2019).

But, although in a context of general setback, some indicators suggest that part of the fabric of Sicilian commercial enterprises has suffered less from the long wave of the crisis. The dynamics of the consistency of fixed retail sales in the period 2017-2019, for example, show a negative balance on a national basis of -2.8% as a consequence of the cessation in Italy of 20,647 businesses, whereas in Sicily the negative balance stood at -1.3%, a percentage which corresponds to the cessation of 7,307 businesses in the three-year period (Source: authors' elaboration of data from the Ministry of Economic Development). It is as if the very small commercial reality had been able to, thanks to its microstructure and its elastic organizational model, adapt better than others, to external negative impacts. There is no doubt that, overall, also the trend of commerce in Sicily, similarly to what is recorded at a national level, reveals a depressive trend in the medium-long term. But the negative impact caused by the economic crisis could have caused some critical issues in the island's commercial network, that the flexibility – if not the fragility – of its structure has paradoxically managed to absorb, at least in part. In this sense, the clear prevalence in the South, and especially Sicily, of businesses with the legal nature of sole proprietorship lends itself to several readings, a certainly a simpler and less burdensome business form which, however, can help better manage market turbulence thanks to a better ability to adapt small and very small enterprises to situations of difficult of endogenous and exogenous origin.

This adaptability could be interpreted as a resilient capacity recognizable in local retail systems based on small and very small businesses, which, although they may appear less competitive, are probably able to better withstand the impact of the crisis by operating in an informal and less regulated economic context.

The term resilience is a concept widely used today in the social sciences as well as in the technological, health

and ecological fields. From a strictly ecological point of view, resilience can be considered as a condition that determines the persistence of relationships within a system and the measure of the system's ability to absorb any changes in state induced by internal and external variables (Holling 1973).

Urban studies increasingly cite resilience with reference to the spatial organization and commercial dynamics of cities. The scientific literature links the urban retail resilience to the ability of the local business system to adapt to changes or shocks that undermine the internal balance without failing to perform its functions in a sustainable and profitable way (Cachinho 2014; Rio Fernandes, Chamusca 2014). In any case, the urban retail resilience is an endogenous quality that should be analysed in the broader framework of spatial planning, since commerce in cities expresses adaptive capacities if it is part of a sustainable and resilient urban system (Kärholm, Nylund, Prieto de la Fuente 2014).

The resilience of small commercial enterprises may appear abnormal considering their shortcomings from a financial, technological and managerial point of view. But, although many studies argue that small and medium-sized enterprises (SMEs) in the commercial sector in periods of prolonged crisis may suffer most from the effects of economic downturns, it is also true that empirical results of studies concerning businesses should be appropriately contextualized, as each territory expresses cultural and social values that influence – often in a very different way – community responses to crises (Bourletidis, Triantafyllopoulos 2014).

The organisational models of the commercial networks, however, are also changing in Sicily to adapt to transformations of the global market, with the result that the sales microstructures also give way here to large-scale organized distribution (in Italian *Grande Distribuzione Organizzata* [GDO]). Small businesses continue to represent the backbone of the Sicilian commercial system even if, as better described below, urban peripheries and even inner areas of the regional territory are increasingly occupied by large-scale retail stores. Even if in 2016 on the island the share of retail appanage of the GDO was still lower than the national average of about four percentage points (Banca d'Italia 2019).

Furthermore, the GDO is characterized by dynamics that favour commercial megastructures rather than minimarkets and supermarkets. In 2012 in Sicily, minimarkets, retail establishments with a sales area between 200 and 399 square meters, represented 34.3% of the total retail outlets of the GDO, while supermarkets, structures that have an equal or greater sales surface at 400 square meters, they represented 52.6%. The department

Figure 1. Consistency of large-scale retail outlets in Sicily from 2012 to 2017. Source: authors' elaboration on ISTAT data, Sicilian Region.

stores, also with an area equal to or greater than 400 square meters but equipped with a wider assortment of products belonging to different types of goods, occupied 10.2% of the market and superstores, retail businesses with surfaces of sales over 2,500 square meters, 2.3%. After five years, that is in 2017, the share of minimarkets had fallen to 31.1%, and that of supermarkets to 50.6%, while department stores and hypermarkets increased up to reaching 15.7% and 2.6% respectively.

Also in Sicily there is therefore the slow but progressive phenomenon of the decreasing in small commercial realities and above all of the so-called “neighbourhood shops”, points of sale that letter e) of paragraph 1 of art. 2 of the Regional Law no. 28 of 22 December 1999, defines as “small businesses with a sales area of up to 100 square meters in municipalities with a resident population of less than 10,000 inhabitants; up to 150 square meters in municipalities with the resident population of no more than 100,000 inhabitants; up to 200 square meters in municipalities with a population of over 100,000 inhabitants”, and, at the same time, the gradual growth of medium-large size structures. It is the small shop, the proximity shop, which gives way to department stores and superstores, icons of a multisector and standardizing consumer space: “Superstores are sometimes called ‘category killer’, because their enormous variety and low price tends to drive an earlier means of consumption, the small specialty shop, out of business” (Ritzer 1999, 18).

The development of retail in Sicily is certainly hampered by the obsolescence of the regional rules governing the sector and their consequent inadequacy to effectively manage the changes underway. It should be considered, among other things, that the Sicilian Statute

Table 1. Trend of the Consistency of commercial enterprises in Sicily, years 2012-2018. Source: Unioncamere, Sisprint

Cod. Ateco	Types	Sicily			South and Islands			Italy		
		Absolute values	Inc. %	Var. % 2012/2018	Absolute values	Inc. %	Var. % 2012/2018	Absolute values	Inc. %	Var. % 2012/2018
G 45	Wholesale and retail repair of motor vehicles and motorcycles	14,657	8.3	-0.9	63,919	7.7	3.5	171,665	7.5	5.5
G 46	Wholesale retail (except of motor vehicles and motorcycles)	33,952	19.1	-1.2	163,593	19.8	3.0	509,577	22.3	-0.8
G 47	Retail retail (except of motor vehicles and motorcycles)	81,217	45.8	-6.4	371,154	45.0	-1.7	850,360	37.1	-2.6

reserves to the Region an exclusive competence in the field of industry and commerce (art. 14, letter d). In any case, the need to modernize laws and regulations concerning the commerce sector in Sicily is a need today felt by all policymakers, as evidenced by the attention paid by regional institutions on various public occasions (most recently during the VI Regional Conference on retail held in Palermo on 3 October 2019) on the topic of updating the sector regulations.

The framework law governing the sector of commerce in Sicily, namely Regional Law no. 28 of 22 December 1999, dates back to over 20 years ago. The regional Administration then intervened with regulatory measures that tried to make the rule adherent, as far as possible, to a dynamic and constantly evolving scenario. But the application of the law has remained substantially unchanged, in the sense that the administrative measures issued over time have not been able to update the approach and therefore to achieve a new strategic vision for the development of the sector.

The regional rules relating to extraordinary sales and liquidations (Regional Law no. 9 of 25 March 1996) as well as retail in public areas (Regional Law no. 12 of March 1, 1995) date back to an earlier period.

2.1 Commercial enterprises in Sicily: a diachronic analysis

Although the individual commercial enterprises show a moderate resilience, the sector as a whole shows clear signs of suffering. This is demonstrated by the negative trend recorded in recent years in Sicily with reference to the size of the commercial companies grouped under the Ateco G 45, G 46, and G 47 macro categories.

In fact, the stock of Sicilian commercial enterprises in category G 45 lost, in the period 2012-2018 almost a percentage point of its consistency, while the same enterprises increased by 3.5% in the South-Islands area and in Italy by 7.5%. A negative sign also for companies marked with the G 46 code, which in Sicily decreased by 1.2% but which in the South and Islands increased by 3%. Finally, the figure of the classified companies G 47: here at the decrease is even more marked because in Sicily the stock diminished by 6.4% compared to the drop of 1.7% in the area of South and islands and, 2.6% in Italy; with the aggravating circumstance that in Sicily, the total of enterprises in this category accounts for 45.8% of the total of commercial enterprises.

3. Some dynamics of retail stores with a fixed location in Sicily

The categories that make up the articulated system of commerce are different and each of them is an expression of a specific composite and changeable production cross-section, continuously conditioned by geo-economic variables, distribution strategies and consumption trends. The wide range of Ateco codes identifying commercial activities testifies, in some way, the complexity of the economic and social universe connected to the commerce sector.

Retail stores, street vending, wholesale and intermediaries are the main typological categories according to which the sales networks are organised. However, the focus of this paragraph is centred on the retail system, and in particular on fixed establishments, considering

Figure 2. Distribution in the Sicilian provinces of fixed-point businesses, year 2019. Source: authors' elaboration on data from the Ministry of Economic Development.

this sector particularly representative of the evolutionary dynamics that cross and shape the world of retail in Sicily.

As of December 31, 2019 in Sicily the number of fixed establishments registered by the Ministry of Economic Development was 66,637 units, equal to 9.2% of the national total and 21.9% of the establishments surveyed in the South-Islands area. In Southern Italy only Campania had a greater number of commercial units (96,231). The number of shops in Sicily is still relevant if considered in absolute terms since the island is ranked fourth among the Italian regions for the number of shops behind Campania, Lombardy and Lazio.

In Sicily, the distribution of commercial activities on a provincial basis has a significant presence of establishments with a fixed location in the provinces of Palermo (23.7% of the total), Catania (20.4%) and Messina (14.3%), where the three metropolitan areas exert clear polarizing effects. The provinces of Trapani follows

(9.2%), Agrigento (8.5%), Syracuse (7.9%), Ragusa (6.9%), Caltanissetta (5.5%) and Enna (3.5%) follow.

The ratio between businesses and resident population highlights in the island a widespread distribution of the commercial networks in the area and therefore an accentuated proximity of the sales service to residents. In Sicily, in fact, we find a shop for every seventy-five inhabitants, whereas in Italy the ratio is one for every eighty-four. The presence in Sicily of a network of neighbourhood businesses distributed throughout the territory is a circumstance also underlined by the Bank of Italy (2019).

The territorial distribution index of the shops allows to observe the distribution on an area basis of the stores in relation to the number of consumers.

In Sicily, the ratio between commercial establishments and resident population calculated on a provincial basis shows a rather articulated geographical location of the activities, with distribution point of sale indices ranging from 0.0152 in the province of Messina and 0.0123 in the province of Catania, territories representing the geographical extremities of the distribution range of the consumer services.

The legal nature of the businesses contributes to defining the profile of the company structure, its competitive skills, the economic basis, the relationships with distribution networks and territory. For this reason, it is interesting to note that in Sicily 64% of Sicilian commercial enterprises in a fixed location prefer the legal form of sole ownership, whereas the figure drops to 62% in the South-Islands area and even to 54.9% in the national territory. The share of businesses owned by joint stock companies and even more that of commercial activities managed in the form of partnerships is decidedly less substantial. In fact, on the island, fixed-point retail companies set up as joint stock companies represent 23.8%

Table 2. Consistency and distribution of the businesses with a fixed location in the Sicilian provinces¹, year 2019. Source: authors' elaboration on data from the Ministry of Economic Development and ISTAT.

	AG	CL	CT	EN	ME	PA	RG	SR	TP	Sicilia	Italia
No. of businesses	5,697	3,679	13,613	2,318	9,556	15,766	4,626	5,283	6,099	66,637	722,234
Population	434,870	262,458	1,107,702	164,788	626,876	1,252,588	320,893	399,224	430,492	4,999,891	60,359,546
No. of shops for every inhabitant	76	71	81	71	66	79	69	76	71	75	84
Distribution index	0.0131	0.0140	0.0123	0.0141	0.0152	0.0126	0.0144	0.0132	0.0142	0.0133	0.0120

¹ Today, due to the Regional Law no. 15 of 4 August 2015, in Sicily the regional provinces have been replaced by the metropolitan cities of Palermo, Catania e Messina and by the free consortia of Agrigento, Caltanissetta, Enna, Ragusa, Syracuse and Trapani.

Table 3. Established commercial businesses separated by legal nature, year 2019. Source: authors' elaboration on data from the Ministry of Economic Development.

	Non classified	% on the total	Other forms	% on the total	Individual company	% on the total	Limited company	% on the total	Partnership companies	% on the total	Total
Sicily	2	0.0%	687	1.0%	42,661	64.0%	15,875	23.8%	7,412	11.1%	66,637
South- Islands	7	0.0%	2,447	0.8%	190,737	62.8%	71,112	23.4%	39,495	13.0%	303,798
Italy	24	0.0%	8,629	1.2%	396,312	54.9%	192,076	26.6%	125,193	17.3%	722,234

of the total, a percentage slightly higher than the average of the companies in the South-islands area (23.4%) but lower by almost three percentage points to the national average (26.6%). The differences are even more marked in the case of partnerships, because in this case the difference is more than six percentage points (11.1% in Sicily and 17.3% in Italy).

As highlighted above, in Sicily the numerically significant presence of individual commercial firms in face of a reduced stock of joint stock companies or of persons would lead to think of a condition of structural weakness. But overall, the Sicilian retail business sector seems to suffer the impact of the crisis less than it does at national level.

Further elements of assessment regarding the competitive and resilient capacities of Sicilian small commercial enterprises could emerge from a comparative verification of the sales surfaces of the businesses. The higher percentage incidence in Sicily of the sales areas of individual company – mostly corresponding to small enterprises – compared to that of limited and partnership companies – certainly larger – could mean a better resilience and adaptability to the crisis by small businesses. The percentage of surfaces of small businesses, among other things, is higher in Sicily than in Southern Italy and in the whole country. However, a direct comparison with other national or regional realities presents objective limitations since the size of the surfaces of the Sicilian businesses is not specified in the statistics of the Ministry of Economic Development for 53% of the total, while at a national level the percentage of unspecified sales areas is 36%. Excluding this distortion, in any case, it is observed that the very small (from 1 to 50 square meters) and small size (from 51 to 150 square meters) surfaces in Sicily represent respectively 23.6% and 18% of the total extension of the surfaces of the establishments in the fixed location, while the incidence of the other commercial areas is much lower (2.2% for areas from 151 to 250 square meters; 1.1% from 251 to 400 square meters 1.8% from 401 to 1,500 sq m; 0.1% for 1,500 sq m and above).

4. Diffusion and new functions of modern distribution systems in Sicily

The change in the economic structure of Sicily that occurred from the second half of the twentieth century, had proposed a new model of the wider territorial system.

The increased productivity of the agricultural sector, due to the modernization of agricultural structures, and the consequent increase in the processing and marketing of agri-food products has meant that the medium and large urban centres, and in particular the main coastal cities with a sufficient infrastructure and financial system, developed a remarkable economic system. In addition, the cities themselves began a process of transformation process, strengthening the secondary sector, especially the petrochemical industry and tertiary, especially the commercial one. In fact, in addition to the metropolitan cities (Palermo, Catania, Messina), the urban centres that showed a substantial urbanization process were precisely those linked to industrial production activities (Gela, Syracuse, Augusta, Priolo, Melilli, Milazzo) and to agricultural and commercial ones (Marsala, Mazara del Vallo, Agrigento, Vittoria, Paternò, Bagheria, Misterbianco etc.)

Moreover, “[...] the commercial potential of coastal areas drew further impulses following the modernization of the already existing and deficient road structures and the construction of new road and railway network infrastructures” (Cannizzaro, Corinto 2013, 45).

The result was “a new urban landscape, in which the concentration of commercial services, entertainment activities and leisure tourist attractions are flanked by large peripheral spaces where medium-large commercial structures were created and are being created that integrate with the multifunctional spaces” (Cirelli 2007, 21).

The changing demographic and economic conditions of these cities have certainly produced new social needs and in recent decades they have imposed new patterns of consumption and organization of the spaces of commerce. Cities increasingly welcome within them the

Figure 3. Territorial distribution GDO: ratio of sales area by number of inhabitants ($\text{m}^2/1.000$ inhabitant). Source: authors' elaboration on data from the National Commerce Observatory, Report Archive.

signs of widespread well-being and a culture that tends to standardize social classes and trivialize places of consumption (Cirelli et al. 2011). The distribution system has not escaped this modernization process, which has had to adapt to the new social functions carried out by occupying ever larger areas.

In the early 1960s, department stores, supermarkets and other types of distribution establishments settled almost exclusively in historic centres. But as early as the 1980s, due to the growing need for space to occupy for the complex functions they were beginning to perform, the modern commercial centres of the GDO have preferred to settle in peripheral areas, or outside the urban context and sometimes in places far from the cities, where land costs are lower, the spaces available much wider, and the accessibility more efficient, since the choice often falls in places close to the main axes. This also happened in Sicily (Cusimano 2017, 214).

The choice to locate commercial centres in suburban areas represented an advantageous solution both for companies and for public institutions that found a convenient solution for use of large areas without causing the city to suffer the impact of the settlement of huge and invasive distribution structures (Zanderighi 2008).

The Sicily region has not escaped this process of location transformation, so much so that the large com-

mercial centres today insist exclusively in the peripheral areas of large cities with greater concentration in the suburban areas of metropolitan cities.

Although the region ranks at the bottom in terms of the presence of large-scale retail outlets (GDO) with a sales area of 291.7 m^2 per 1000 inhabitants (Fig. 3), from 2010 to 2018 the percentage of growth, although it is lower than that of the macro-region of the South/Islands, it is however in line with that of the country (Tab.4).

It is however in the five-year period 2005-2010 that on the island there is a significant settlement phase of

Table 4. Territorial distribution GDO: ratio of sales by number of inhabitants ($\text{m}^2/1.000$ inhabitants). Source: authors' elaboration on data from the National Commerce Observatory, Report Archive.

Geographic area	31/12/2010	31/12/2018	Δ 2010-2018	Δ % 2010-2018
Italy	345.0 m^2	413.9 m^2	68.9 m^2	20.0
Northwest	422.3 m^2	491.8 m^2	69.5 m^2	16.4
Northeast	444.5 m^2	554.0 m^2	109.5 m^2	24.6
Centre	306.7 m^2	331.8 m^2	25.1 m^2	8.2
South and Islands	251.8 m^2	321.7 m^2	69.9 m^2	27.7
Sicily	240.9 m^2	291.7 m^2	50.8 m^2	21.1

Table 5. Large-scale retail businesses and sales area in Sicily. Source: authors' elaboration on data from the National Commerce Observatory, Report Archive.

Type	Year 2005		Year 2010		Δ 2005-2010	Year 2018		Δ 2010-2018
	N°	m ²	N°	m ²	N°/ m ² (%)	N°	m ²	N°/ m ² (%)
Minimarkets	158	47,925	456	138,488	+298 / +90,563 (+189)	420	126,171	-36 / -12,317 (-8,9)
Supermarkets	519	423,434	736	571,252	+217 / +147,818 (34,9)	763	632,339	+27 / +61,087 (+10,7)
Department Stores	122	144,211	127	141,450	+5 / -2,761 (-1,9)	213	218,800	+86 / +77,350 (+54,7)
Superstores	10	53,156	27	184,524	+17 / +131,368 (+247,1)	39	224,672	+12 / +40,148 (+21,7)
GSS	33	113,378	64	181,173	+31 / +67,795 (+59,8)	68	256,544	+4 / +75,371 (+41,6)
TOTAL	842	782,104	1,410	1,216,887	+568 / +434,783 (+55,6)	1,503	1,458,526	+93 / +241,639 (+19,8)

¹ Grandi Superfici Specializzate (Large Specialized Surfaces)

these distribution formats with an increase in the sales area equal to 55.6%, while in the subsequent period considered, 2010-2018, except for Department Stores and Specialized Large Surfaces, which recorded an increase of 54.7% and 41.6% respectively, showed a slowdown or stall phase with a little significant growth both in numerical terms of structures and in terms of occupied surface (Tab.5). In the case of the Minimarkets, there has even been a setback. Evidently this turnaround denounces a certain level of saturation of the regional territory, especially in the provinces most equipped with large commercial centres.

In fact, although the large-scale retail outlets in Sicily are ubiquitous, the unequal location between the ex-provinces of the island is evident.

Moreover, the largest distribution types, hypermarkets and large specialized areas, mostly insist in the metropolitan cities of Catania¹, Palermo and Messina. Even the former provinces of Ragusa and Syracuse show a commercial vitality, characterised by a significant presence of commercial poles of considerable extension. While the GDO structures of the former provinces of Agrigento, Trapani, Caltanissetta, and Enna are still somewhat backward, as evidenced by the greater presence of commercial distribution formats more similar to traditional structures such as minimarkets and supermarkets (Cirelli et al. 2011, 186; Cannizzaro 2019, 211).

¹ Catania boasts a long commercial history, the first commercial center in Sicily was formed since the 1970s in Misterbianco, the hinterland city of the Etna capital.

In recent years, however, large shopping malls have also been established in the former *minor provinces*, as in the case of Sicilia Outlet Village, a real commercial village in the territory of Agira in the province of Enna.

The establishment of large-scale retail outlets has expanded to the functions of different cities and consequently redetermined the island's urban hierarchy. Furthermore, the modern malling process, in addition to the evident territorial transformations, has expressed some positives such as the decongestion of traffic in historic centres, the creation of new safer socialization places, greater control of hygiene conditions, full compliance with tax regulations, the greater vitality of peripheral areas otherwise destined for degradation (Cannizzaro 2019, 218).

5. Conclusions

Some summary considerations can be useful to try to provide an overview of the commercial sector in Sicily. The sector is in crisis, as on the other hand is observed in the rest of the country. There is a transformation of the sales networks, with department stores and hypermarkets taking the place of small commercial realities and neighbourhood shops, although this process occurs more slowly than in other parts of Italy. This change is likely to affect the density and distribution of the sales networks, which are now very close to the residents. For some years already, in fact, there has been a strong concentration of

hypermarkets and larger distribution chains in metropolitan areas and their slow but progressive diffusion in less urbanised territories. The obsolescence of the regional legislative and regulatory system does not help the sector to face the challenges imposed by changes in the global market. However, the extreme flexibility of the micro organizational model, certainly the most widespread in Sicily and usually indicative of a condition of structural weakness, could have helped part of the sector to cope better with the impact of the crisis. However, this is a situation which in the long term can only lead to negative effects that can no longer be resolved. For this reason, it is necessary to strategically rethink the development trajectories of the sector.

Looking at the effects produced by the 2008 crisis on the Sicilian trading system, at the changes and contradictions of its organizational model, characterized by the advancement of large-scale distribution and, at the same time, by the survival of a fragmented and micro-company sales network, it seems that in Sicily, the current configuration of the commercial system is functional to the reorganization strategies of contemporary cities.

Edward W. Soja (1989), among the main trends that identify the modern processes of restructuring of urban space, indicates the centralization and concentration of the ownership of capital, whose materialization takes place through the formation in the cities of large corporations; together with this centralizing trend, however, another is developing which instead delegates part of the functions to decentralized operating units, which are therefore less controlled and more flexible. In this way, the range of action of capital is widened, so that it can reach parts of the market that would otherwise escape its ownership. The coexistence in Sicily, apparently contradictory, of two very different types of commerce, the large-scale retail trade and the small or very small commercial enterprise, could therefore be explained as a need to optimize the sales space and maximize profits in an area where the advanced consumption models of Western societies coexist with a widespread informal economy. This shows how important it is to address the issue of the consumption of goods and services taking into account the more general changes affecting the space and organization of cities.

References

- Banca d'Italia (2019). *L'economia della Sicilia. Economie regionali*, Vol. 19.
- Bourletidis, K., Triantafyllopoulos, Y. (2014). SMEs Survival in time of Crisis: Strategies, Tactics and Commercial Success Stories. *Procedia - Social and Behavioral Sciences*, 148, 639-644. DOI: 10.1016/j.sbspro.2014.07.092
- Cachinho, H. (2014). Consumerscapes and the resilience assessment of urban retail systems. *Cities*, 36, 131-144. DOI: <http://dx.doi.org/10.1016/j.cities.2012.10.005>
- Cannizzaro, S. (2019). La diffusione di nuovi modelli distributivi in Sicilia e la moderna funzione del commercio nelle Città metropolitane. In Cusimano, G. (Ed.). *Le strade del commercio in Sicilia. Analisi e ricerche sul campo*. Milano, Franco Angeli, 205-219.
- Cannizzaro, S., Corinto, G. L. (2013). *Paesaggio in Sicilia. Dialogo territoriale ed episodi paesaggistici*. Bologna, Pàtron Editore.
- Cirelli, C. (2007). La città e il commercio. In Cirelli, C. (Ed.). *Gli spazi del commercio nei processi di trasformazione urbana*. Bologna, Pàtron Editore.
- Cirelli, C. et al. (2011). Il commercio, elemento modificatore del territorio. Nuovi modelli distributivi e morfologie urbane in Sicilia. In Gemmiti, R. (Ed.). *C'era una volta la città. Una lettura multidisciplinare del mutamento urbano*, Bonanno Editore, Acireale-Roma, Vol. I, 157-191.
- Cusimano, G. et al. (2017). Gerarchie territoriali e commercio in Sicilia. In Viganoni, L. (Ed.). *Commercio, consumo e città. Quaderno di lavoro*. Milano, FrancoAngeli, 213-220.
- Holling, C. S. (1973). Resilience and stability of ecological systems. *Annual Review of Ecology and Systematics*, 4, 1-23.
- <http://osservatoriocommercio.sviluppoeconomico.gov.it/DEFINIZIONI%20STATISTICHEattuali.pdf>
- Istat (2018). *Rapporto annuale 2018. La situazione del Paese*. URL: <https://www.istat.it/storage/rapporto-annuale/2018/Rapportoannuale2018.pdf>
- Istat, Regione Siciliana. Statistiche vendite del commercio. In *Annuario Statistico Regione Sicilia*. URL: <http://sistanhub.istat.it/asrsicilia>
- Kärrholm, M., Nylund, K., Prieto de la Fuente, P. (2014). Spatial resilience and urban planning: Addressing the interdependence of urban retail areas. *Cities*, 36, 121-130. DOI: <http://dx.doi.org/10.1016/j.cities.2012.10.012>
- Ministero dello Sviluppo Economico (2018). *Rapporto sul sistema distributivo. Analisi strutturale del commercio italiano*.
- Ministero dello Sviluppo Economico (2019). *Definizioni statistiche esercizi della grande distribuzione organizzata*. URL:

Ministero dello Sviluppo Economico, Osservatorio Nazionale del Commercio. *Tavole statistiche*. URL: <http://osservatoriocommercio.mise.gov.it/>

Osservatorio Nazionale del Commercio, <http://osservatoriocommercio.mise.gov.it/index.html>

Rio Fernandes, J., Chamusca, P. (2014). Urban policies, planning and retail resilience. *Cities*, 36, 170-177. DOI: <http://dx.doi.org/10.1016/j.cities.2012.11.006>

Ritzer, R. (1999). *Enchanting a Disenchanted World: Revolutionizing the Means of Consumption*. Thousand Oaks, Pine Forge Press.

Soja, E.W. (1989). *Postmodern Geographies. The Reassertion of Space in Critical Social Theory*, London – New York, Verso.

Studi e Ricerche per il Mezzogiorno (2020). *Bollettino Mezzogiorno*, Vol. 1.

Unioncamere, Sisprint (2019). *Report Regione Sicilia. Dati e informazioni sullo stato e sull'evoluzione del profilo socio-economico del territorio*, Vol. 1.

Zanderighi, L. (2008). Commercio e gestione delle città. In Cirelli, C. (Ed.). *Città e commercio*. Bologna, Pàtron Editore, 81-86.