

english summary

COLUMNS

| | |
|-------------------------------------|----------|
| Fairs | pag. 93 |
| Enterprise Documents | pag. 143 |
| Library | pag. 144 |
| Study & Research | pag. 145 |
| IT Solutions | pag. 155 |
| Courses & Seminars | pag. 163 |
| Job Opportunities | pag. 165 |
| Profiles & Careers | pag. 166 |

DAYBOOK

| | |
|---------------------------|---------|
| Distribution | pag. 16 |
| Finance | pag. 18 |

TRENDS & SCENARIOS

| | |
|--|---------|
| Enterprises & Environment | pag. 22 |
| Enterprises & Innovation | pag. 23 |
| Enterprises & Consumers | pag. 25 |

MERGERS & ACQUISITIONS

| | |
|------------------------------|---------|
| Main Operations | pag. 26 |
|------------------------------|---------|

PRODUCTION

CONDIMENTS

Sauces for all the tastes pag. 29
Outdoor aperitifs and snacks push the market of mayonnaise, mustard and readymade sauces that is worth 176 million Euros by now. The light versions for consumers who want to keep their figure are also increasing.

WINE

Brindisi Doc pag. 37
Within a growth scenario, the Italian companies record lower performances in quantitative terms. Export is under full sail thanks to the excellence of Italian products and aggressive politics.

CHEESES

A fresh or a seasoned market? .. pag. 43
With 400 different products, Italy holds the record of cheese variety at European level, thus coping with France. Parmigiano Reggiano and Grana Padano stand out at the top of sales of hyper and super markets.

DEEP FROZEN FOODS

The kitchen garden in the freezer pag. 49
The frozen vegetables market is growing: in 2006 sales increased of 1.4%, 16% only for ready soups and "minestrone". Critical point: the periodicity of summer time that favors ice creams.

PETFOOD

A bowl for connoisseurs pag. 53
International scenarios form now to 2010 deepens the emergent trends: multifunctional, tasteful and valuable foods, new sizes, to meet the taste of our four-leg friends.

HOUSEWARE

The secrets of nonstick cookware pag. 58
The Teflon coated cookware is more and more used in the Italian kitchen since it is safe and functional. Companies are investing in the research to test economic and long lasting materials.

TISSUE PAPER

Does Italy go downhill? pag. 65
European leader thanks to high qualitative standards, the domestic market feels the effects of the strong increase of the production costs. Volumes, consumptions and export are decreasing.

SMALL HOUSEHOLD-ELECTRICAL APPLIANCES

Full steam ahead pag. 68
The sector of domestic ironing enjoys a very good health: in the last year it increased of 5,1%. The competition of China and Eastern Countries puts the made in Italy on the spot.

FAIRS

Successful exhibition stands pag. 75
The stand is becoming more and more the external appendix of the company, a multimedia center with audio visual equipment and connections, often projected by famous designers and architects.

FOOD SAFETY

Fines for omitting controls pag. 79
Omit annotating the track of a food can involve pecuniary sanctions, if it is not withdrawn in case there are doubts for the health. However, the obligation is not applicable to the internal traceability.

FLORICULTURE SECTOR

An international bouquet pag. 80
The competition of Africa and Asia leaves its effects stron-

gly. The Italian market hangs in: the export of flowers and plants towards extra Ue Countries reached a quota of 106 million Euros: +22,6% compared to the previous year.

SEEDS

A field to be cultivated pag. 84
The market demands high productive, qualitative and sanitary performances. Italy confirms its leadership thanks to dynamic and innovative companies. Keeping an eye to the environment.

Production in brief pag. 87
other news on www.largoconsumo.info/abbonati

DISTRIBUTION

EMOTIONAL FURNISHINGS

Emotional furnishings pag. 95
The point of sale has become in the time a place where people can live feelings and experiences. This new requirement turns into the adoption of functional equipment, with elegant designs.

DO-IT-YOURSELF

The do-it-yourself shelves are increasing pag. 102
In spite of the delay regarding the other European Countries, the sector records a positive trend with an increase of 4.8% in 2006 compared to the previous year. The hypermarkets and the Global Distribution System aim at promotional offers and assistance services to attract new customers.

FRANCHISING

The hi-fi as a partnership pag. 105
The affiliation is not the most diffused formula in the consumption electronics retail, but it has a future. In fact it allows conveying the brand by experimenting new distribution ideas.

LARGE AREAS

The slowdown of the organic sector pag. 110
10 years after the organic products joined the large-scale retail trade, they are passing a stagnation phase, due to the pressure on the prices that focused the attention on discounts and promotions, to compete with the discount stores.

Distribution in brief pag. 115
other news on www.largoconsumo.info/abbonati

COMPANY COMMUNICATION

PROFILES

AKZO NOBEL (pagg. 62-63). Akzo Nobel, through its Coatings division, is the leader company in the paints and varnishes market. During the Environment fair in Frankfurt the company introduced the innovations of its Non-Stick business unit in the field of "clean technology" applied to the pottery, thus reconfirming its capability of making innovation.

ASSOPROLI (pagg. 186-187). Società Cooperativa Agricola gathers approximately 38.000 associates and stands among the biggest Italian sector organizations. The certification of a supply chain composed of 3.186 olive growing companies guaranteeing the complete traceability and safety of a high level production is the jewel in the crown of Assoprolì Bari.

BRABANTIA (pagg. 100-101). Brabantia closed the year 2007 with high performances both in Italy and worldwide, thanks to a strategy based, today and in the past, on some steady points: high quality, functionality, aesthetic appeal, robustness to last in the time and unique design.

CALDIROLA (pagg. 40-41). The company decided to value its own brand "La Cacciatora", by joining to Barbera d'Asti doc, key product of the company, a wine range that better describes the Italian regional wine tradition: a high profile proposal to satisfy the present consumption trends.

FIORUCCI (pagg. 20-21). Leader in the salami market in Italy and consolidated as a "big" of the international scenario, Fiorucci launches a line of products produced with 100% natural ingredients: a proposal in line with the present consumption needs and trends that confirms the company on the top of innovation in the respect of the famous Italian tradition.

NORTEK (pagg. 108-109). Nortek designs, plans and implements IT products and consumer electronics, characterized by a unique aesthetic style. The company is present in Bologna and in China, Hong Kong (global marketing, production control, quality assurance, world-wide export) and Shenzhen (research and development, production).

INTERVIEWS

GL EVENTS (pag. 116). Antoine Bonnel, director, illustrates strategies and perspectives of MDD Expo, the increasingly important fair dedicated to the quality private label to be held on 26 and 27 March 2008 in Paris.

HAMELIN PAPERBRANDS (pag. 90). Interview to Stefano Giubertoni, managing director of the company born from integration between Banzato Hamelin and Canson Italia.

COMPANY CASES

SAIWA (pag. 160). Saiwa entrusted to Infor, a company specialized in software solutions designed for innovation oriented companies, a Management Performance project aimed at a more effective business management.

COMPANY MEETINGS

BOSCH (pag. 89). On last July the company arranged a visit to St. Niklaus plant (Switzerland), world-wide competence centre of Bosch Group for the production of gang saws and diamond cutting discs.

FOCUS

COMPO (pag. 81). Gesal introduces the new liquid manure: a complete line of products enriched with Microelements, to assure a better nutrition of the plants. The range includes ten references indeed.

CONSORZIO ECOSVILUPPO SARDO (pag. 47). BioCaseus 2008, the edition of the international competition of organic agriculture cheeses, created and organized by the Consortium Ecosviluppo Sardinia in co-operation with various operators of the organic world and public agencies, saw the participation of 112 cheeses.

CONSORZIO TUTELA IGP AGNELLO SARDEGNA (pag. 92). A tasting evening organized by Ve-

CONSUMERS

LIFE STYLES

More and more outdoor pag. **118**
In a period of crisis, families spend less, above all on foods prepared at home. On the contrary, the number of Italians who have their meals at bars, restaurants and public premises is increasing.

HOME CHEMISTRY

Perfumed cleaning pag. **122**
It is a mature market that, after the expansion experience in the Nineties, is presently aiming at the richness of assortment and more and more specialized and dedicated products, from scent to packaging.

DOCUMENTS: FAMILY CONSUMPTION

Milanese queuing in the Supermarket pag. **126**
They fill the shopping trolley mainly with meat and vegetables. They choose the modern retail, rather than shops. They do not spend a lot: the budget for two people is 12 euro per day.

DOCUMENTS: ELDERLY PEOPLE AND LIFE STYLES

Third age in the spotlight pag. **127**
In Italy 15 million people over 65, the 40% according to a survey by 50&Più Fenacom, declare they are economically self-sufficient. In addition, in the 20% of cases, the grandparents support the finances of the new generations.

Consumers in brief pag. **129**
other news on www.largoconsumo.info/abbonati

COMMUNICATION

MARKETING

The leaflet's predominance pag. **133**
Brochures and coupons are the aces in the hole of the Global Distribution System: they offer the possibility of aiming at a specific target using the geo-marketing new systems to promote the weekly offers.

DOCUMENTS: SURVEY BY AUDIPRESS

Little glanced through magazines. pag. **137**
The sales of weekly and monthly magazines are decreasing in our Country, as reported in a survey by Audipress 2007. The progressive disaffection towards politics and the economic stagnation are among the main causes.

DOCUMENTS: URBAN SOLID WASTE

Wastes for their weight in gold . pag. **138**
Sky high prices for the fares in the Southern towns, although the waste service is in a dramatic situation. Serious delays also in the application of Ronchi decree.

Communication in brief pag. **139**
other news on www.largoconsumo.info/abbonati

LOGISTICS

ACCESSIBILITY

Four wheel commercial centres pag. **147**
Road practicability and availability of comfortable parkings are crucial factors for the good operation of a modern commercial destination mainly under the pressure of competitors.

TECHNOLOGY

Free service wireless pag. **151**
The big distribution uses more and more applications like "voice picking" and "self-scanning", as shown in a survey carried out by Polytechnic of Milan inside the companies.

Logistics in brief pag. **153**

HUMAN RESOURCES

TRADE NETWORKS

Subordinate or flexible too? pag. **156**
Well assigned objectives, incentives and control of performances, are the levers that favor the direct selling. A mix used in different ways by the companies, as shown by a survey.

Human Resources in brief pag. **159**

FINANCE

TOOLS

The private equity goes forward in the big distribution pag. **168**
The comparison between two private equity operations in distribution enterprises shows how the intervention of an external player is fundamental for the company development.

Finance in brief pag. **171**
other news on www.largoconsumo.info/abbonati

ENVIRONMENT

NORMS & RULES

The reclamation of polluted lands pag. **172**
The new Legislative Decree on the management of soils contaminated by industrial activities is going to be issued. A particular importance is assigned to control and monitoring activities and the examination of the position of the subjects involved.

RECOVERY

The importance of a sustainable lightness pag. **173**
The recycle is a great value activity in the field of aluminum: it bears for the 75% on the national production. Here is the situation on the economic sector and the collection development contained in the Cial report.

DOCUMENTS: RECYCLE

New life to the paper pag. **174**
The paper recovery market is growing in Europe. While other Countries are investing in big plants, the Italian sector is stopped by enterprise fragmentation and poor infrastructures.

Environment in brief pag. **175**
other news on www.largoconsumo.info/abbonati

ENERGY

SOURCES

Return to nuclear energy pag. **176**
The debate on nuclear power plants is reopened: Italy will attend the research on safe and non-polluting nuclear reactors of fourth generation. However, the high costs and the impact on the public opinion are slowing down the development.

Energy in brief pag. **179**
other news on www.largoconsumo.info/abbonati

INDEX & MONITORING

Raw Materials pag. **180**
Price san consumptions pag. **182**
GDO sales pag. **184**
Reading paths pag. **189**
Information for readers and advertisers .. pag. **191**

ronafiare and dedicated to the IGP Lamb of Sardinia, was held on last 28th February in the splendid scenario of Villa Amistà - Byblos Art Hotel of Verona.

EFFEFFE PETFOOD (pag. 57). Effeffe Pet Food, leader company in Italy in the production of dried food for dogs and cats, under the distributor's brand name, was awarded the Innovation Prize within the competition held at Marca Fair 2008.

EUROFLEX (pag. 71). Euroflex's objective is upsetting the concept of housework, making them easier and faster guaranteeing the best performances. Easy use, energetic saving, safety and design are its strengths.

FIERA PARMA (pag. 141). Waiting for the next Cibus 2008, there are many innovations, starting from an impressive infrastructure implemented in record time: the road coplanar to A1 highway, an investment that amount to 21 million Euros.

FORSAN (pag. 111). The Forsan production can be presently subdivided in two big families: the natural alimentary integrators, that are the 40% of the turnover and the natural cosmetics (that covers the remaining 60%).

GRANSAPORI (pag. 31). GranSapori is a young company born to propose a range of veritable "sweeties": products fruit of subtle equilibrium and refined ingredients mix, selected and elaborated on the basis of regional typical recipes.

KRAFT (pag. 35). Year after year, thanks to the launch of new formats destined to satisfy the different consumption needs, Kraft Mayonnaise has become a veritable product line.

NOBERASCO (pag. 131). Noberasco launched the new Kitchen Line: a veritable explosion of unique and alternative tastes destined to enrich recipes and add taste and originality to any plate.

OLEIFICIO ZUCCHI (pag. 142). The new Internet site of Oleificio Zucchi (www.oleificiozucchi.com), that proposes itself in a completely renewed shape and content, is about to start.

SIGMA (pag. 117). "Scelto" is the new premium line Sigma branded: it includes a first group of 30 regional and gourmet products, 20 out of which come from alimentary grocery and 10 are fresh.

SPREAFICO (pag. 140). Sweet, juicy, aromatic and with an optimum shelf life. These are Angèlys' gifts, the pear protected by a varietal club that is produced and commercialized in Italy exclusively by Spreafico Francesco & F.lli S.P.A.

TVS (pag. 59). TVS' XL year has started. It is the year where the company celebrates its first 40 years of very intense activity. It is above all a year where TVS wants to return and show without half measures "how to XL" (how to excel) to all its interlocutors.

SPOT

ALLUFLON (pag. 61). Alluflon, Italian industrial reality with a production capability of over 14 million pieces of cooking tools per year, introduced the 2008 innovations in the last edition of Macef.

BBS (pag. 139). The "Casallegra" line by BBS has completely renewed in the brooms, brushes and accessories segment, adopting an innovative design with models suitable for any type of surface.

CIP 4 (pag. 161). The main mission of the renewed trade division of Cip4 is to be closer to responsible purchases and marketing of the distribution.

COOPERLAT (pag. 45). Protect and value the regional products and, at the same time, develop the most suitable strategies to distribute the best local productions all over the Country: here is Cooperlat's strategic mission.

FRAMAR (pag. 73). Framar, main actor in the ironing tables and household accessories market, started a decidedly important year for its development.

NOVARTIS (pag. 55). Novartis Animal Health, reference pharmaceutical company for the health and the well-being of our pets, proposes Interceptor Flavor, one of the most sold anti-filariasis products in the world.

UNILEVER (pag. 125). Unilever was awarded the Product Stewardship 2007prize, a prestigious acknowledgment assigned by Federchimica to the re-launch of Cocolino line.

SPECIAL THEMES

ISTITUTO ITALIANO IMBALLAGGIO (pag. 9-15). Here are the 29 finalists of the Packaging Oscar 2008, as usually promoted by the Italian Packaging Institute and this year dedicated to quality design.