

# english summary

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Mentioned: persons, enterprises, brands, organisms  
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Globalization: The demographic decrease and the sepa-

ration between a "rich" and westernized economy and a "poor" one, create strong contrasts in the consumption.

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Communication: Draw consumer's attention, pose a problem and drive him to a purchasing choice, are the keys of a winning communication.

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The first list of the retail brands at European level, introduced to the retail World Congress in Barcelona, emphasized the increasing importance of a brand in the trade.

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Development: "Young ideas to look ahead. A new spirit to grow": this is the topic of the 24th edition of "L'incontro", the annual Nielsen meeting.

## PRODUCTION

<b>FISHING INDUSTRY</b>	
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The consumption of deep frozen fish burst out in the last 20 years. The year 2007 showed a slight drop (-0.8%) in demand compared to 2006.

<b>READY SAUCES</b>	
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The market is strongly expanding due to the change of life rhythms. Italy is the biggest producer of tomato by-products.

<b>WINE</b>	
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In Japan the wine market keeps growing, thus becoming more and more competitive with more than thirty Countries, included Italy, that export their wine there.

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The growth of singles and the changed alimentary

habits accelerate the development of cheap products, from packed salads to fruit.

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How to conjugate taste and well-being? Industries answer to this dilemma to contrast the increase of obesity and cardiovascular diseases.

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The strawberries' consumption remains stable against the increase of raspberries, blackberries and cherries, overcoming the phase of niche products.

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Brazil is the third world producer thanks to the significant availability of raw materials and competitive prices for fashionable products.

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Waiting for Sial 2008, the exports of the food sector achieved in 2007, 17,8 billion Euros, the 15.8% of the total turnover.

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## DISTRIBUTION

<b>CLOTHING</b>	
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The turnover is of over 1 billion and 650 million Euros, plus 420 million Euros for footwear and accessories also thanks to franchising.

<b>CLOTHING</b>	
<b>The big distribution in search of underwear</b> .....	page 83

The big distribution stand out as a privileged sales

## COMPANY COMMUNICATION

### PROFILES

**BERGAMASCHI&VIMERCATI** (pages 104-105). Bergamaschi & Vimercati, a company specialized in kitchen and home care products, has been constantly updating its own huge portfolio, strongly addressing its efforts on lines that can express a "concept": coherent and unique shapes, colors, materials.

**FILA** (pages 26-27). Beautiful and funny gift packs for Christmas 2008, to play with the fantasy, colour histories and model personages belonging to cartoons or dream world: the new and cheerful FILA solutions are born to stimulate children's fantasy and creativity.

**LA-VIS** (pages 18-19). La-Vis Group introduced at Vinitaly projects and products addressed to the consumer goods market. The aim is to launch also in retail market the values and the peculiarities of a big cooperative group, that has matured in these years a strong experience on the international markets.

**RED BULL** (pages 90-91). The company launches Red Bull Cola thus entering a big sized market with a 100% natural and unique product: a premium soft drink different from others, destined to the HORECA and the modern trade and supported by a sound promo-advertising campaign.

### MEETINGS

**CAVIRO** (pages 46-47). The celebration day organized to celebrate Tavernello's 25 year activity, lived a debate moment within a round table entitled: "Which Supply Chain, which controls, which sanctions for the protection of the Italian wine's image".

**SANPELLEGRINO NESTLÉ WATERS ITALIA** (pages 164-165) On last 19th June 2008, Levissima organized, in cooperation with the Università degli Studi di Milano and the Comitato Glaciologico Italiano, the convention "Why are glaciers withdrawing? A new frontier in the scientific research: the glacial meteorology from poles to equator".

### COMPANY EVENTS

**UNIVERSITÀ DI FIRENZE DIPARTIMENTO SCIENZE AZIENDALI** (pages 144-145). The first Master in Organization and Management of the Cooperative Consumption Enterprises, promoted by the Faculty of

Economy of the University of Florence, in agreement with the Coop School of Montelupo and the Ancc, ended up.

### LE INTERVISTE

**KODAK** (page 114). The market of the digital cameras keeps registering significant increase performances. Kodak ranks among the big players of the sector: Alfredo Lorenzini, trade marketing manager Digital & Film Imaging System, illustrates Kodak's innovations in this field.

**IPACK-IMA** (page 128). Alberto Bauli, newly-elected president of Ipack-Ima, speaks about the strengths of 2009 edition and how he wants to offer his own experience to a so important reality.

**INTERBRAND** (page 112). Create and manage the brand value, implementing actions and strategies aimed at making it a tool capable of creating the best economic value for the company: we speak about it with Manfredi Ricca, business director of Milan headquarters.

**SALONI INTERNAZIONALI FRANCESI** (page 78). Jean-Luc Margot-Duclos, director of ARD (Regional Agency for the Economic Development of Paris Ile de France) professional events, illustrates the strengths of the "Parisian Region" as the ideal place to accommodate significant international fairs exhibitions..

### COMPANY CASES

**LIDL** (page 88). At the beginning of the year LIDL introduced actual price reductions of approximately 100 products of wide consumption: a real measure, of significant impact, to answer "on the field" to the high cost of living, confirming its strategy as the leader of the hard discount channel.

### COMPANY MEETINGS

**SOLO ITALIA** (page 76). Since 1997, Solo Italia has been the reference company in the spoon desserts sector. The launch of the new industrial oven was the occasion to visit, on last 17th June 2008, the production plant.

### COMPANY STRUCTURES

**VINCENZO ZUCCHI** (page 150). Zucchi is dropping out of a difficult period: the year 2008 marks the return to profits, but it mainly announces a very important and delicate appointment, that is the expiration of the syndicate pact that ties the family, fixed in February 2009.

channel for men's underwear: in the last season it reached a 30% market share.

**Distribution in brief** ..... page **87**

## CONSUMERS

### SOFT DRINK

**For thirst or simple pleasure** ..... page **93**

Soft drinks aren't a regular habit for Italians, who however appreciate them also together with meals. Instead, purchasing is planned and the 88% does it at the big distribution.

### FURNISHING

**Luxury bathrooms** ..... page **97**

The field is expanding and for 2008 an additional market increase of 2,5-3% is forecasted thanks to the preference for luxury furniture.

### ATTITUDES

**Jewish meals** ..... page **100**

Nourishment which refers to ethical and symbolic values sometimes uneasy to be identified. A complex survey of recipes fixed in the Jewish tradition.

### PAINTINGS & VARNISHES

**More space to colour** ..... page **101**

A sector supported by the building growth and the spread of home based do-it-yourself thanks to the new eco-sustainable technologies.

**Consumers in brief**..... page **107**

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## COMMUNICATION

### SPORTS MARKETING

**Brands in the championship** ..... page **109**

An investment strategy that appeals to the public's interest.

st. A restricted market animated by companies and clubs as an occasion for visibility.

**Communication in brief**..... page **113**

## LOGISTICS

### RECYCLING

**A very cheap glass from wastes** ..... page **121**

The Italian glass industry is more and more exploiting the recycle of bottles, objects and containers used for the energetic saving.

### PACKAGING

**Watertight and safe strongboxes** ..... page **125**

The use of metals, mainly aluminum, to produce tins, boxes, tubes and other food and drink containers is very effective.

**Logistics in brief** ..... page **129**

## HUMAN RESOURCES

### PROFESSIONS

**A specialist of the distribution network** ..... page **137**

From goods handling management to supply chain perspective, to follow the product from production to consumption: it is the natural evolution of the logistics manager.

**Human Resources in brief** ..... page **139**

## FINANCE

### EVALUATION

**Spotlights on Megamark** ..... page **148**

A great reality leader in the distribution sector in Southern Italy. Its analysis evidences the solidity

and estimates a consistency of over 129 million Euros.

**Finance in brief/Balances** ..... page **151**

## ENVIRONMENT

### WATER RESOURCES

**The good sources for the territory's economy** ..... page **159**

In Italy the mineral water consumption keeps growing and it is an effective tool for the development and the valorization of its production area.

**Environment in brief**..... page **166**

## ENERGY

### ELECTRICITY

**The bill in the shopping trolley** ..... page **168**

The experimentation has started and, while new brands come out, it will be possible to see if the sale of energy in the big distribution is really successful.

**Energy in brief**..... page **169**

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## INDEX & MONITORING

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The quotations of raw materials are growing and in May they recorded an increase equal to 10, 7% thanks to the renewed expansion of fuel oils.

**Prices & Consumptions** ..... page **172**

In April 2008 it was recorded an additional drop relevant to the quantities purchased by Italian consumers (-0.9%) compared to April 2007..

**Reading paths**..... page **175**

Information for readers and advertisers .. page **176**

## FOCUS

**ALCASS** (page 69). Alclass, one of the Italian leader producers of deep frozen meat, will attend the Sial 2008 (Paris, 19-23 October 2008) to introduce to the international market the wide range of products for the HORECA, trade and normal trade channels.

**BOLOGNA FIERE** (page 55). Healthy and tasteful food, health and self-care, a house able to offer simplicity, naturalness and beauty: from the three historical areas of SANA emerges a project more and more near to the people's needs, a new idea of well-being, advanced if compared to the new life styles.

**CESARE FIORUCCI** (page 57). The company launches the first range of products exclusively prepared with 100% natural ingredients, without additives of chemical origin, used until now in the salami industry.

**I.L.P.A.** (page 51). A mixed flavored salad with cutlery, in a two section pack, easy-to-use and safe, that preserves the product fresh and intact for six days. These are the main characteristics of the new salad born from the collaboration between Coop and ILIP.

**LEGAMBIENTE** (page 167). The registrations to the eighth edition of the "Prize to the Innovation Friend of the Environment" are opened till next 31 August 2008. It is an initiative supported and promoted by Legambiente and Lombardy Region, in cooperation with Luigi Bocconi University and Polytechnic of Milan.

**MONTANA** (page 140). The "Montana prize to the Alimentary Research" (2nd edition), established in 2006 by Montana Alimentari with the aim of supporting young Italian researchers, encouraging the scientific research on the nutrition, was awarded on last 18th June 2008 in Milan.

**OOBY MAIOR** (page 115). The new agency is able to solve the "communication" problem in any condition: from integrated communication - corporate identity, catalogues, brochures, packaging, company information - to advertising, web, video.

**PARADISO** (page 161). Paradiso oligomineral water rises from Carnic Alps. It flows pure at 8 meters from the sea level, and is ready to drink from five springs internal to the Estate: Paradiso 1, Paradiso 2, Pocenja, Annia and Torsa.

**PARMACOTTO** (page 59). Parmacotto launches "Perfecto", a cooked hyposodic ham that finds its reason for being in a more and more cross-sectional and generalized sensibility towards the nutritional and healthy profile of foods.

**SAN BENEDETTO ACQUA MINERALE** (page 95). Always careful to the evolution of lifestyles and consumptions, San Benedetto Mineral Water presents Batik Break, a drink that successfully conjugates taste and health for the daily equilibrium.

**SMEA UNIVERSITÀ CATTOLICA SACRO CUORE** (page 141). The High School of Agricultural and Food-Economy, the Cremonese business school of the Catholic University for future managers of agricultural and food-enterprises, opened the registrations for its 25th activity year.

## SPOT

**ARIOSTO** (page 43). When we speak about flavorings, we immediately think of products to be directly added on the food. On the contrary, Ariosto provided some main bases for the preparation of sauces that must be used like the famous "diced vegetables".

**BRANDED APPAREL ITALIA** (page 85). The partnership between Shock Absorber and the Pink Volley made its debut on last June at the World Grand Prix 2008, where Italy faced Cuba, Poland and Dominican Republic,

**BRITA ITALIA** (page 163). Founded in 1966 in Germany, Brita is the world leader company in the production of drinkable water filtration systems for domestic and professional use.

**COCA-COLA HBC ITALIA** (page 96). According to the Best Corporate Brand 2007, Coca-Cola is selected only to Bayer in the list of companies with the best corporate image of last year.

**CPR SYSTEM** (page 49). Cpr System, one of the biggest leaders in Europe in the management of a recyclable packaging system with collapsible sides for the fruit and vegetables sector, celebrates its ten year activity.

**INGENICO** (page 89). The PinPad Ingenico i3070 has recently obtained the CO.GE.BAN. homologation - a Microcircuit Project that allows, also within the Retail, safe installations in accordance with EMV bank standards.

**LA ROSA** (page 81). La Rosa Spa has always been a synonymous of research, experimentation and innovation as to materials, design, shapes, in the important sector of mannequins manufacturing.

**VALBONA** (page 42). Great innovation at Valbona's: the "Pesto all'Arrabbiata" is born, a one of a kind condiment that joins the practicality of a ready sauce to the pesto's typical cream.

**SGS ITALIA** (page 65). SGS is world leader in the inspection, verification, analysis and certification services. The Group is considered among the mainly credited agencies for the safety and the health of food products.

**SISMA** (page 77). Innovation, quality and continuous research distinguish Sisma Spa's policy. The company, always careful to consumers needs, introduces the new PeelPlus disks, suitable for any type of skin.

## SPECIAL DOSSIERS

**SIAL D'OR** (pages 6-15). Let's introduce the winner of the Sial d' Or Italy and the others eight products selected to represent Italy within of prestigious prize organized and promoted by the Salon International de l' Alimentation de Paris.