

# english summary

## CONTENUTI EDITORIALI

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Mentioned: persons, enterprises, brands, organisms  
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## POINTS OF VIEW

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<i>On last 26th September, after the success gained in Turin and Milan, Eataly-high food opened a store in Tokyo with an investment of 10 million euros.</i>	

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*versial relationship keeps going on between Italians and payment cards, diffused but little used.*

## PRODUCTION

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<i>The smoking techniques determine the organoleptic properties of salmon. In Italy special treatments are used to give the product a longer life.</i>	
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<i>Italy ranks fifth in Europe among the producer countries, after Holland, France, Spain and Poland, with 90.000 tons and beyond 200 companies.</i>	

## PRODUCTION PROCESSES

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<i>In 2006 in Italy 250,000 tons were consumed and 260.000 were produced. The chocolate companies are carrying out controls on the entire supply chain.</i>	

## FRUIT & VEGETABLES

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<i>Positive signs are coming from the Italian fruit and vegetables sector, mainly thanks to the export increase. Investments are the key for the future.</i>	

## DRIED FRUIT

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<i>The market grew up to a value of 6.3% with a turnover of 374 million Euros, in spite of a slowdown in the volumes. Walnuts and almonds are at the top.</i>	

## WINE

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<i>Muscat, Raisin wines and Vinsanto are niche and high quality products that reflect the regional differences. They accompany desserts or meals.</i>	

## WINE

<b>The guarantee of biological winese</b> .....	page <b>50</b>
<i>The biological wines rank first in Europe as to</i>	

*quantity: they are preferred by the most attentive consumers who consider them good and protected by fraud attempts.*

## COSMETICS

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<i>They hold the consumption of hair care cosmetic products with a turnover of 1.167 million Euros. The sector is driven by innovation</i>	
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## DISTRIBUTION

<b>INTEGRATED AGRICULTURE</b>	
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<i>The trend is towards a limited use of agro-pharmaceutical product, in favour of organic techniques for the treatment of plants and cultivations.</i>	
<b>FRANCHISING</b>	
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<i>It is a winning formula that allows entrepreneurs to exploit the already existing brand notoriety, thus increasing the local economy.</i>	
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## CONSUMERS

### BEER

<b>Increasing mugs</b> .....	page <b>87</b>
<i>A positive 2007 for the "light" ale: the production exceeded 13 million hectoliters (+5% compared to 2006), while consumptions grew of 3.7%.</i>	

### ALIMENTARY STYLES

<b>Gourmet people</b> .....	page <b>94</b>
<i>The emiliano-romagnoli inhabitants can eat in a healthy and nourishing way. A survey describes them as traditionalist, but not closed to diet innovations.</i>	

### SEASONING

<b>The sweet trend of vinegar</b> .....	page <b>98</b>
<i>Classic, balsamic, made with apples or biological, it is a typical element of the Italian kitchen with penetration rates of 85% in the families.</i>	

## COMMUNICATION

### PROFILES

**ARBE** (pages 92-93). Arbe is synonymous of spice, aromatic herbs and highest quality and healthy tisanes, certified at international level: a product range respecting typicality, that proposes the best of the Italian production and - as to spices - the tropical areas.

**FRESCO** (pages 6-7). Fresco offers to the market a very wide range of products in all the segments of the ready meals and sandwiches, controlling the modern channels with an efficient logistics and guaranteeing innovation, safety and flexibility.

**PESCANOVA** (pages 18-19). Also in the current year Pescanova has implemented important activities: from the re-launch of breaded products with new Fishburgers, to the sponsorship of the 20th Italy Sailing tour: an occasion to introduce "Lupo di Mare", the handsome testimonial that will more and more characterize the company's initiatives.

**PONTI** (pages 96-97). Ponti keeps a strong leadership in the vinegar market and confirms itself as a valid actor in the vegetable preserves market as well. Today the company is a highly production capacity group and technologically advanced.

**VARVELLO** (pages 100-101). Since 1921, Varvello has produced high quality wine vinegar thanks to its long experience and big wine cellar consisting of wooden barrels for the aging of the product: an exceptional expertise, that makes Varvello the historical partner of many brands in the industry and retail market in Italy and worldwide.

**VIVA** (pages 188-189). The company is born with an aim: offer to an attentive quality and typicality oriented consumer a wide assortment of high range products, declined in three distinguished brands, under the banner of "Italian traditions".

### INTERVIEWS

**DHL** (pag. 148). DHL plays a leader role also in Italy, where it aims at offering to the customers a more and more efficient and accurate service. We speak with Elena Galletti, DHL Express (Italy) Customer Service Manager.

**KELLOGG** (pag. 68). Kellogg Italy confirms itself as the leader in the breakfast cereals production. Antonio Posa, general executive manager illustrates us the company's trend and its important development plans.

**PARMACOTTO** (pag. 62). The first "Salumeria Rosi" opened on last 25th September in New York: Parmacotto faces a new challenge under the banner of the agro-alimentary "made Italy". Stefania Rosi, marketing manager, speaks about it.

**SONAE MANAGEMENT ITALY** (pag. 80). Sona and Sierra are joining the most important players, at international level, in the trade centres market: Pietro Malaspina, managing director of the Italian branch, speaks about it.

### COMPANY CASES

**CANTINE RIUNITE - CIV** (pag. 170). Cantine Cooperative Riunite from Reggio Emilia and CIV from Modena, both reference players in the sector of Lambrusco, merged after a long and complex negotiation developed in the latest months.

**CHEF** (pag. 82). The company has faced a change process, availing itself of the collaboration of Studio Chiodi Consulting from Rimini, aiming at meeting with effectiveness and flexibility the market evolution.

### FOCUS

**AQUA FOOD** (pag. 25). Aqua Food srl is born with the aim of making customers know and commercialize smoked or pickled first quality fishing specialties.

**ALASKA SEAFOOD** (pag. 27). The main managers of trade and food service enterprises, buyers of fishing products, analyzed the sustainability of fishing in Alaska during an educational forum held in Anchorage, Alaska..

**COMPO AGRICOLTURA** (pag. 65). Compo Agricoltura acquired the brand in 2001 and laun-

## DOCUMENTS: FAMILIES' BEHAVIOURS

**A house full of life** ..... page 103

The home behaviours outline a new familiar feature. A research identifies the impact on the consumption choices.

## PERSONAL HYGIENE

**Between health and psychology** ... page 105

The producers of sanitary towels and detergents are more and more investing in surveys on the profiles of consumers to drive their purchasing choices.

**Consumers in brief**..... page 109**COMMUNICATION**

## OENOLOGY

**Does the wine world believe in communication?** ..... page 113

Enotria carried out a survey on the 20 Italian companies with the highest turnover and others very dynamic on communication strategies.

## E-PUBLISHING

**Video counterattack** ..... page 116

In Italy the video games market for console and PC realized in 2007 a turnover of beyond 1 billion Euros (with an increase of 39.9%).

## MEDIA

**Messages left... to the wind...** .. page 120

In the Internet era, banners and flags are used to promote local and international events and manifestations, from fairs to Olympic Games.

**Communication in brief**..... page 123**LOGISTICS**

## PACKAGING

**Packed values** ..... page 133

We interviewed the winners of the last edition of the Packaging Oscar to analyze the most important characteristics of the packaging

## TRANSPORTS

**How much is rental reasonable?** page 139

The rental of equipment, from trolleys to conveyor belts, is already a more and more diffused and reasonable practice for all the supply chain operators.

## STATIONERY

**Short supply chains for pencils and notebooks** .. page 142

The supply chain of stationery products is short, with a maximum of 5 passages for the peripheral points of sales. The consumptions have been slowing down for 2 years.

**Logistics in brief** ..... page 147**HUMAN RESOURCES**

## NORMS &amp; RULES

**More safety with the new****Unified Body of Laws** ..... page 156

The document, approved on last 9th April, defines with greater precision obligations and duties of the companies to protect the employees' health

## PROFESSIONS

**The sales manager** ..... page 157

From the management of contractual relationships to the application of agreements signed at domestic level: these are the tasks of the national key account retail.

**Human Resources in brief** ... page 158**FINANCE**

## STOCK EXCHANGE

**Very healthy food shares** ..... page 163

Since 2005 the raw materials prices have been following an increase trend, facilitating the access to investments in food commodities also to the private companies.

## COMPETITIVE SCENARIO

**Small household-electric appliances keep growing** .... page 165

After a 2006 of consolidation, in Italy the sector shows timid signs of recovery. Italy ranks fifth among the world consumers.

## CONSUMPTION CREDIT

**The map of missed payments** . page 169

The loans for little purchases are more and more requested by families. Italians are reliable in reimbursing them as evidenced by data collected at regional level.

**Finance in brief** ..... page 171

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**ENVIRONMENT**

## ECOLOGY

**For a sustainable logistics** .... page 173

The challenge of the next years is the transformation of the supply chains into closed chains, going from raw materials to waste recovery.

**Environment in brief** ..... page 176**ENERGY**

## ELECTRICITY

**The cost of renewable sources** .. page 178

We compared the costs for energy generation from solar paddles, biomasses, photovoltaic and aeolic devises with the traditional resources.

## PERSPECTIVES

**Too many wastes with old the household-electric appliances** . page 180

The economic crisis stops the substitution of obsolete appliances, in spite of incentives, with serious consequences for the environment.

**Energy in brief** ..... page 181

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**INDEX & MONITORING****Raw Materials**..... page 182

After the adjustment of the previous month (-0.5%), in August the general index of the raw materials brought a strong negative variation (-7,4%).

**Prices and consumptions** ..... page 184

In July the crisis continues: negative trends, for the fifth consecutive month, mainly or mobility (-6.7%) and recreational services (-5.2%).

**Big Distribution sales** ..... page 186

Thanks exclusively to the prices increase the turnover of the big distribution keeps growing in the third two month period of 2008..

**Reading paths** ..... page 191**Information for readers and advertisers** .. page 192

ched it vigorously in the modern distribution. Presently, the catalogue introduces a total renewal of the brand that involves products and communication.

**INCALL** (pag. 145). Mitama "Il bello della qualità", a fastly rising brand in the field of stationery, chose Incall, a company specialized in the services to the consumer goods market, as its exclusive dealer for Italy.

**ITALTRANS** (pag. 151). Italtrans grew quickly, achieving the leadership in the specialist transport. Since 2000 the company has been supplying high added value logistic solutions..

**LA-VIS** (pag. 69). History, sense of tradition, experience and passion, combined with technology and advanced wine-growing, are the elements that make the two wines by Sorni Cantina La Vis unique..

**LEADER** (pag. 117). Leader spa announced the agreement signed with RTL Games, the German publisher born last year and already able to offer a rich line up for all the platforms.

**MEGGLE** (pag. 111). Meggle, brand owned by the homonymous German multinational, is known all over the world as a synonym of high quality in the dairy and milk production.

**NOBERASCO** (pag. 45). Noberasco, leader in the field of dried fruit, improves Vado Ligure production site, with a new system of pasteurization that has no equal in the world.

**PROLOGIS ITALY MANAGEMENT** (pag. 149). ProLogis (NYSE, PLD), the main owner, supplier and developer of real estate for world logistics, opened the ProLogis Park of Anagni (Rome) on last 17th July 2008.

**STELLA BIANCA** (pag. 67). On last May, at the Castello of San Colombano al Lambro, the company celebrated its first 30 year activity: a perfect occasion in order to discuss on the achieved goals and the objectives to be achieved in the next few years.

**CENTRI COMMERCIALI MONGOLFIERA** (pag. 81). The Centri Commerciali Mongolfiera are the only case in Italy of a unique brand for more trade centers. A strong brand deeply rooted in the territory.

**TRISCELE** (pag. 89). The Triscele plant, a valuable historical and architectonic structure, became a reference point for many national and international brands in the beer market.

**SPOT**

**ATARI** (pag. 118). Infogrames Entertainment, through its Atari consumer brand, announces the constitution of a new study of internal development under the creative and productive leadership of Paulina Bozek.

**BAKERY** (pag. 59). It is called "Pagnotta Contadina", has got a potato taste and belongs to the family of flat loafs, launched by Bakery some weeks ago and already available in many centres of the big distribution.

**BBS** (pag. 177). With the launch of Home Care, the BBS Casalegra enriches with a range of fresh and wrapping fragrances, packed in practical bottles useful for little spaces.

**CITEF** (pag. 51). EuroCave, a group specialized in the wine preservation and presentation, introduces Sowine, a wine bar easy-use and technologically advanced.

**F.LLI POLLI** (pag. 61). Polli creates the SenzaOlio, a new way to introduce and make people taste the vegetables, selecting the best and more genuine fruits of our lands.

**HEINEKEN** (pag. 91). To strengthen its presence in Italy, Budweiser, in collaboration with Heineken Italy, announces the creation of a dedicated sales network.

**LA-VIS** (pag. 63). The collection "Ritratti" is twenty years old: 2008 was the occasion reconfirm and promote the significant contribution offered - to the Cantina and the Trentino territory - to be introduced in Italy and abroad.

**NOBERASCO** (pag. 43). The new working processes implemented in Vado Ligure plant allow Noberasco to introduce an innovative line that includes plums, apricots, figs and other fruits.

**SISMA** (pag. 107). Sisma SpA a company very careful to the requirements of consumers and market, adds to its wide range the new cleaning make up discs made of cotton and True Aloe.