

# english summary

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Mentioned: persons, enterprises, brands, organisms  
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### TRENDS & SCENARIOS

#### ENTERPRISES AND CONSUMERS

**The new democracy of the made in Italy** ..... page 12  
*In the common understanding the made in Italy it is a world full of meanings. The concept is different from Italianity that is not other than an identity card.*

#### STATUS OF ENTERPRISES

##### DO-IT-YOURSELF

**Spotlights on Leroy Merlin in Italy** ..... page 14  
*The expansion of Leroy Merlin that in 2008 acquired Castorama Italia, the company owner of 31 do-it-yourself stores with an expense of 615 million euro, keeps going on.*

#### THE MARKET FIGURES

### FOOTWEAR

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*The year 2008 has been a testing ground for the sector, since it demonstrated its strength within a scenario of world trade slowing down with repercussions on the export.*

### PRODUCTION

#### WINE

**Guaranteed goblets** ..... page 19  
*Today the quality certification is a strategic key for export. The wine companies are more and more often adopting voluntary managerial standards.*

#### PRODUCTION PROCESSES

**Export mugs** ..... page 23  
*In spite of the crisis the 2008 market resisted, mainly thanks to export doubled during the last few years towards United States and United Kingdom.*

#### DAIRY INDUSTRY

**The relaunch of Bufala dop** ..... page 28  
*The producers of Bufala mozzarella are bearing the weight of reduced gain margins. The big distribution's role in fixing the prices is fundamental.*

#### STRATEGIES

**Joining for fields good** ..... page 33  
*A model coming from France will surely spread in Italy too: the aggregated agricultural enterprise, as the answer to the difficulties of the small direct cultivators.*

#### SALAMI

**Italian hams and salami are our ambassadors abroad** ..... page 34  
*In spite of the world, the international market is a development area for the cold cuts. The sector represents the 20% of our agricultural and food industry.*

#### SALAMI

**Pig's trotter and pork sausage beyond celebrations** ..... page 38  
*Linked to the Christmas consumption, pig's trotter and*

*pork sausage suffered the repercussions of the crisis. Therefore, producers aim at turning from the logic of seasonality.*

#### FRUIT & VEGETABLE MARKET

**A "passport" to global market** .. page 41  
*From Eurep to GlobalGap: the change was not only in the name, but also in substantial contents and controls. The European Protocol is a voluntary world reference.*

#### SEASONINGS

**A full taste market** ..... page 43  
*Spices and aromas do not know crisis: till August 2009 the sector recorded a sales increase of 8.8%. The biological herbs are entering the market.*

#### INFORMATION TECHNOLOGY

**The problematic co-existence between mobiles and mini ones** ..... page 46  
*Superfast ADSL, IP TV, power line connections, high speed Local Area Networks (LAN). The gap will be wider between people who can use them and people who can't.*

**Production in brief**..... page 51

### DISTRIBUTION

#### MERCHANDISING

**Shop windows in a good sight** page 55  
*The shops' aspect is a fundamental business card that influences the customer so far as to induce or to discourage him to enter the point of sale.*

#### RETAIL

**The challenge between Italy and France** ..... page 59  
*Perspectives of international development and strong push towards innovation and integration of customer service are the winning factors of the transalpine big distribution.*

#### VENDING

**Automatic machines ... poorly sought after** ..... page 63  
*Even if the number of consumers who purchase pro-*

## COMMUNICATION

### PROFILES

**BOLOGNAFIERE** (pages 4-5). The sixth edition of Marca, being held on 20th and 21st January 2010, will see the modern distribution as a main protagonist, thanks to the agreement that BolognaFiere signed with Adm, the Association that gathers up the greatest distribution enterprises active in Italy.

**CIP4** (pages 140-141). Cip4 is specialized in the production of products for the feminine hygiene, the personal care and the surface cleaning, for many big operators of industry and international retail. Top quality products, innovation and a deep market knowledge, make of the company a protagonist in Europe.

**PARAMOUNT FARMS** (pages 10-11). Ripened in the sun of California in a plantation of 12.000 hectares, pistachio nuts Wonderful, already successfully present in many Countries worldwide, are destined to deeply innovate the Italian market too.

### INTERVIEWS

**AIOICI** (page 114). Aioici, the Italian association that joins together certification and inspection companies is going to celebrate its 20 year activity. We speak about it with Giovanni Oliveri, president, who illustrates the activities and the plans of the association.

**IDM GROUP** (page 94). For the modern companies, as confirmed by Mario Calagnini, general manager of the company that acquired Anacomp Italia, the importance of the Business Process Outsourcing (BPO) and the Document Management is growing.

**PARMAREGGIO** (page 50). In an food market that is suffering less than others the global crisis, Parmareggio kept growing, thus confirming the effectiveness of a strategy voted to the creation of a brand. We speak about it with Paolo Micheli, president.

**RIGHT MANAGEMENT** (page 116). The human resources are a fundamental asset for the enterprise: identifying the various talents useful for the corporate structures and managing them at best, is a main need. We speak about it with Antonio Angioni, general manager of Right Management.

**SONAE SIERRA** (page 74). A strong investment for the trade center "Le Terrazze" in La Spezia and the decision of offering itself as a service provider: this is a very active phase for the company. We speak about it with Giancarlo Bianchi, general executive manager of Sonae Sierra Developments in Italy.

### COMPANY CASES

**TRONY** (page 70). The collaboration with Diennea and MagNews, technological platform that allows the management of direct multichannel marketing campaigns in a simple and efficient way, with the objective of implementing a loyalty plan through the shipment of sms and newsletters, was born this year.

### FOCUS

**BIOSLYM** (page 85). Bio Slym is a company founded in 2003, aimed at creating authentic products, obtained only using biological and conventional soia and rice exclusively highly selected and of Italian origin, not genetically modified and exploiting scrupulous control methods along the entire supply chain.

**CIS - COMPAGNIA ITALIANA SALI** (page 45). The Compagnia Italiana Sali was inspired by the rich history of salt and spices and by their strong link to create the new Insaporitori (seasonings), made by a mixture of aromatic spices and iodated sea salt.

