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Branded Cooking Oils in Italy - Food & Beverage Report Series

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Abstracts

With approximately 15-20% of the world's production, Italy is the second major producer of olive oil in the world (source: International Olive Council data). An increasing demand in the sector of edible oils has been sparked off by higher consumption, particularly in emerging countries (those in Asia and Latin America above all), due to the emergence of a significant middle class and to a growing demand for healthy food and a "Mediterranean diet".

Italian products in the cooking oil sector are generally perceived as high quality and, despite the "Italian sounding" phenomena, "Made in Italy" food has a significant role in emotional-driven sectors such as HoReCa and top-class food consumption.

The main objective of this study is to provide a full overview of the cooking oil sector in Italy, by identifying the major producers of branded products, setting-up a "cooking oil map" of the most efficient players in the competitive arena and providing business and financial information for each company.

This study is not intended to provide the total size or forecast the market evolution at national and international level. It aims to report a complete and objective picture of the sector in Italy by analysing: (i) types of products offered (extra-virgin olive oil, olive oil, pomace oil, seed oils and flavoured oils); (ii) main brands of products; (iii) geographical map of production in Italy; (iv) distribution channel used; (v) international presence of companies; (vi) main financial information of each company covered.

JUNTO Research's report covers 44 producers in Italy and represents one of the most complete guides available on the market. It reports on top Italian producers with minimum revenues of € 10 mn, for a sector total Revenues in 2012 of approximately €

2.9 bn and employees in excess of 2,300 people. The report includes the main statistics of the sector, distribution channels, international presence of companies with branches/subsidiaries abroad and gives a ranking of the companies by different economic and financial metrics.

The competitiveness of each company is analysed with a unique and innovative approach. In fact, Junto has identified a Competitive Scoring System (called Junto Score) that allows the analysis of the competitive positioning of each company in the Branded Cooking Oil sector in Italy. Junto uses parameters like size, growth, margins, return on capital, financial structure and work efficiency.

The report is addressed to international companies operating within this sector in different parts of the value chain (producers, importers, distributors, retail chains, etc.), but also to financial players (banks, private equity firms, other financial investors or advisors) who could find this sector attractive, as demonstrated by the recent Deoleo equity deal in Spain.

For the first 20 players of this sector, Junto has also produced detailed Company Reports containing complete business, financial, ownership and competitive information.

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I. ANNEX: JUNTO SCORE - METHODOLOGICAL NOTE

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