

# The World Food Business Summit



## The Meaning of Value

ROME, ITALY 16-18 JUNE 2004

The Official Programme

The Event for the leaders of the World Food Business

*Exclusively reserved for CIES members*

# Why do you consider attendance at The CIES World Food Business Summit as an imperative for you and your organisation?



"The CIES World Food Business Summit is a unique opportunity to shine a spotlight on the globalisation of the food business, as well as to learn from different experiences and approaches. The choice of Italy as the venue for this meeting will contribute greatly. I wish this annual meeting of the food business much success."

## **Daniel Bernard**

Chief Executive Officer, Carrefour Group

"The CIES World Food Business Summit is a magnet each year for those who want to keep up-to-date on the champions, the challenges and the crises of the global market. Missing it is like missing your annual check-up."

## **Senator Feargal Quinn**

Executive Chairman, Superquinn

"The Summit is an important forum for strengthening relationships built on understanding and trust so that our collective results serve the needs of consumers in every community where we do business."

## **Douglas Daft**

Chairman & Chief Executive Officer, The Coca-Cola Company

"The CIES World Food Summit provides an opportunity to see what's new in the industry and build beneficial relationships, all in one location. It has been very beneficial to our business. This event is a priority to our Wal-Mart team."

## **John Menzer**

President & CEO, Wal-Mart International

"The CIES World Food Business Summit provides thought leadership and a unique occasion to network with the sector's key players at a truly global level. I hope that the Italian food business will take full advantage of the 2004 Summit in Rome."

## **Arturo Bastianello**

Managing Director, Gruppo PAM S.p.A.

"As a retailer, it is vital to be involved in the global community and to gain a better understanding of how our competitors operate in a global context. CIES and The World Food Business Summit give us the tools to be competitive. I think CIES is doing a fabulous job."

## **Don E. Marsh**

Chairman, President & CEO, Marsh Supermarkets, Inc.

"The CIES World Food Business Summit is an excellent platform for learning, sharing and networking; we never fail to take home fresh ideas."

## **S. Chandra Das**

Chairman, NTUC Fairprice

"The CIES World Food Business Summit is the ideal meeting place for decision-makers from the food business. Retailers and suppliers come together at this event to discuss new trends, evaluate successful strategies and debate on latest developments in the sector."

## **Claude Hauser**

Chairman of the Board of Directors, Migros-Genossenschafts-Bund



# Welcome

## → What is The CIES World Food Business Summit?

The annual “rendez-vous” of food business leaders who understand that anticipating the future is key to success.

## → Why should you attend?

To obtain knowledge and thought-leadership. More specifically...

### Strategic Perspective

To have the opportunity to stand back and view your business from a new strategic perspective.

### Networking

To meet your fellow leaders from the global food business.

### Actionable Insights

To obtain practical ideas which you can promptly turn into action.

### Food Focus

To be informed, to debate and to reflect on the latest trends and developments in the global food business and on the general social, political and economic context in which it operates.

## → What are the benefits?

Membership of an exclusive world-wide food business network at top management level.

Exposure to new strategic concepts, companies and thought-leaders from both inside and outside the food business.

The opportunity to influence the overall direction of the food business world-wide.

# Who will be there?

- Executives who influence the strategies of their companies and the business they are in
- Retailer and supplier CEOs and top management
- Supplier's senior sales and marketing management

## Companies whose top management attend The Summit as an imperative include:

**Retailers:** Aeon, Ahold, Auchan, Billa, Caprabo, Carrefour, Casino, Coop, Cora, D&S, Dagrofa, Daiei, Dairy Farm, Delhaize, Dohle, Esselunga, Exito, La Fragua, Globus, Haggen, Hakon, ICA, Jeronimo Martins, Kesko, Laurus, Longs, Marks & Spencer, Marsh, Massmart, Metcash, Metro, Migros, Norgesgruppen, NTUC FairPrice, Pam, Pick 'n Pay, Rallye, Robinsons, Rustan, Safeway, Sok, Somerfield, Sonae, Superquinn, Supervalu, Système U, Tansas, Tegut, Tesco, Thrifty, Trader Joe's, Waitrose, Wal-Mart, Wegmans, Woolworths.

**Suppliers:** Andros, Anheuser-Busch, Bahlsen, Ballantines, BAT, Bimbo, Bongrain, Catalina, Checkpoint, Chep, Coca-Cola, Colgate-Palmolive, Danone, Energizer, Exel, Ferrero, Georgia Pacific, Heineken, Henkel, Hormel, IRI, Johnson & Johnson, Kraft, L'Oréal, Master Foods, NCR, Nestlé, Oetker, Pepsi, Procter & Gamble, Reckitt Benckiser, S.C. Johnson, Sara Lee, Sodial, Tyco, Unilever Bestfoods.

## The Summit Committee:

**Chairman:** Neville ISDELL, Consultant to THE COCA-COLA COMPANY  
Gareth ACKERMAN, PICK'N PAY HOLDINGS Ltd., South Africa  
Xavier ALOMAR SOLER, CAPRABO S.A., Spain  
Axel ANDREE, OETKER INTERNATIONAL GmbH, Germany  
Jacques-Edouard CHARRET, CASINO GROUP, France  
Renaud COGELS, DELHAIZE GROUP, Belgium  
Jacques-Etienne DE T'SERCLAES, PRICEWATERHOUSECOOPERS, France  
Peter DETTMANN, ICA FÖRBUNDET, Sweden  
Klaus DOHLE, DOHLE HANDELSGRUPPE GmbH, Germany  
Rhoda LANE-O'KELLY, CIES - THE FOOD BUSINESS FORUM  
Patrick RABAIN, L'ORÉAL GROUP, France  
Ronald VAN SOLT, ROYAL AHOLD  
Roland VAXELAIRE, CARREFOUR GROUP, France

## The World Food Business Summit The Event for the leaders of the Global Food Business

# The Meaning of Value

We now know that we need to be profitable and responsible to survive. But where does this leave the fundamental business concept of value? The Rome Summit explores the changing definition of value: at a macro level, in the context of fair and sustainable trade; at an operational level, amid major shifts in the marketplace; and among the key agents in driving real change... people.

Value will be explored under the following topics:

## → The Price of Fair and Sustainable Trade

The average EU cow receives more in subsidies than the average sub-Saharan African lives on per day. Where do the food business and the consumer fit into this global picture? This session examines how trade can create value in the wider sense of prosperity.

## → Food Politics

Whose fault is it that we are fat? Fast food vendors and food manufacturers are in the firing line. Are retailers next? What responsibility does our sector have for the health and nutrition of society? This session will consider value and values as our business tackles the diverse challenges of obesity and famine.

## → Tectonic Shifts in the Market Place

Today's business environment is like a series of tectonic plates, all moving, but not always in the same direction. Retailer brands, discounter strategies and new forms of competition all raise many questions. Where are the market eruptions happening and what do they tell us about consumers? This session will explore the changing definitions of consumer value.

## → Brand Italy

Brand Italy is powerful in its automatic association with food, coffee, wine and an entire spectrum of upmarket luxury brands across the fashion, design and motor industries. This session looks at brand value through case studies that encapsulate Italy's unique success as a brand and provides global/local learnings for the food business.

## → All Roads Lead to People

People are at the core of the retail business, but remain its most fragile asset. How can we apply innovation to re-inspire employees and consumers alike? This session will focus on maximising value to and from our people.



# Summit Schedule 2004



|           | Wednesday, 16 June       | Thursday, 17 June                              | Friday, 18 June                  |
|-----------|--------------------------|--|----------------------------------|
| Breakfast |                          |  | Breakfast Breakout Session       |
| Morning   | Store visits (optional)  | Plenary Business Session<br>Spouses' Programme | Plenary Business Session         |
| Lunch     |                          | Delegate Lunch<br>Spouses' Lunch               | Delegate Lunch                   |
| Afternoon | Opening Business Session | Plenary Business Session<br>Spouses' Programme | Closing Business Session         |
| Evening   | Opening Cocktail         | Official Cocktail                              | Official Gala Reception & Dinner |



Value “The worth, desirability or utility of a thing. One’s principles or standards; one’s judgement of what is valuable or important in life.”  
The Concise Oxford Dictionary.

# Opening Session

PM Wednesday, 16 June



**Pierre-Olivier Beckers**  
Chairman of CIES-The Food Business Forum  
& President & CEO, Delhaize Group

**Mike Moore**  
Former Director General of the World Trade  
Organisation & Former Prime Minister of New Zealand

**Manuel Fong Jr.**  
Managing Director, Supervalu Inc., Philippines

**Claude Hauser**  
Chairman, Migros-Genossenschafts-Bund, Switzerland

**John Menzer**  
President & CEO, Wal-Mart International

**Anders Moberg**  
CEO, Ahold, The Netherlands

**Mike Moore**  
Former Director General of the World Trade  
Organisation & Former Prime Minister of New Zealand

**Vincenzo Tassinari**  
Chairman, Coop Italia

## The Price of Fair and Sustainable Trade

The average EU cow receives more in subsidies than the average sub-Saharan African lives on per day. Where do the food business and the consumer fit into this global picture? This session examines how trade can create value in the wider sense of prosperity.

14.30 **Welcome to The Summit**

14.50 **Session Introduction**

15.00 **A world without walls**

The case for freedom, development, free trade and global governance.

*Moderator, Denise Larking-Coste, Author & Business Writer*

15.45 **The price of fair and sustainable trade  
– A CEO Panel**

A discussion on the role of retailing in world trade, development and globalisation. What does fair and sustainable trade mean for the retailer and what do their customers think?

*Panel Moderator, Denise Larking-Coste, Author & Business Writer*

16.45 **Refreshment Break**

17.15 **The Meaning of Value**

A global brand explores the changing definitions of value and values.

18.00 - 19.30 **Opening Cocktail in the gardens  
of the Hilton Cavalieri Hotel**

Guest Speaker

# Morning Session



AM Thursday, 17 June

## Food Politics

Whose fault is it that we are fat? Fast food vendors and food manufacturers are in the firing line. Are retailers next? What responsibility does our sector have for the health and nutrition of society? This session will consider value and values as our business tackles the diverse challenges of obesity and famine.

**Marion Nestle**  
Professor and Chair, Department of Nutrition  
and Food Studies, New York University

**Mats Lederhausen**  
Managing Director, McDonald's Ventures,  
McDonald's Corporation

**Guest Speaker**  
Global food manufacturer  
**Wolfgang Gutberlet**  
Chairman, tegut

**David Harcharik**  
Deputy Director-General, FAO

09.00 *Moderator's Introduction*

### 09.10 **Food Politics:** **The nutrition & obesity debate**

Whose fault is it that we are fat? Marion Nestle argues that an over-efficient food industry does everything possible to persuade people to eat more food, more often – at the expense of waistlines and well-being.

*Marion Nestle is author of "Food Politics – How the Food Industry Influences Nutrition and Health" and most recently "Safe Food – Bacteria, Biology and Bioterrorism".*

### 09.45 **Developing a healthy business** **at McDonald's**

The world's largest food service provider shares lessons on nutrition, communication, product assortment and food safety. Results to date of a renewal programme to balance profitability with consumer health and well-being.

*McDonald's serves 47 million customers each day at more than 30,000 restaurants in 119 countries.*

### 10.15 **Refreshment Break**

### 10.45 **What responsibility does our sector have** **for the health and nutrition of society?**

A retailer and a supplier consider solutions and opportunities for impacting the health and nutrition issue globally.

*tegut...Gutberlet Stiftung & Co is a family-run business with 340 outlets in central Germany and a clear focus on producing and selling organic products.*

### 11.55 **Famine and poverty, a global affair**

The FAO strives to alleviate poverty and hunger by promoting agricultural development, improved nutrition and effective food security. How can retailers and manufacturers help?

*The FAO is the Food and Agriculture Organisation of the United Nations and is based in Rome.*

### 12.30 **Lunch**



# Afternoon Session

PM Thursday, 17 June

Charles Handy

Social Philosopher, Management Scholar & Author

Guest Speaker

Guest Speaker

Dr. Jürgen Elfers

Financial Analyst, Head of European Retail Research  
Commerzbank, Germany

Dr. Victor K. Fung

Group Chairman, Li & Fung Group

## Tectonic Shifts in the Market Place

Today's business environment is like a series of tectonic plates, all moving, but not always in the same direction. Retailer brands, discounter strategies and new forms of competition all raise many questions. Where are the market eruptions happening and what do they tell us about consumers? This session will explore the changing definitions of consumer value.

Moderator, *Charles Handy*, Social Philosopher, Management Scholar & Author

### 14.00 Understanding the shifts

Charles Handy sets the scene. The business world is currently like a series of tectonic plates all moving, but not always in the same direction. Handy will discuss the implications for organisations and society of major developments around the world. Case study examples follow.

### 14.40 What business are you in?

What lessons can the global food business harness from the mobile revolution?

### 15.20 Refreshment Break

### 15.50 Retailer Brands – the brand of choice?

Retailers are offering a growing choice of elegantly packaged, high-quality and frequently cheaper products than major manufacturers. Where will it end? What does it mean for retailer-supplier relationships?

### 16.30 The industrialisation of food retailing

The growth of the hard discounter, the meteoric rise of Lidl and the implications of this changed landscape for food retailers.

*Commerzbank is a German private sector bank with total assets of approximately 390 billion euros. The bank's 32,500 employees serve approximately 6 million customers world-wide.*

### 17.10 Leveraging growth from an orchestrator of complex supply networks. How retailers and consumers benefit

*Li & Fung is a global trading group managing the supply chain for high-volume, time-sensitive consumer goods.*

### 19.00 - 20.30 Official Summit Cocktail in the Palazzo Taverna

## 07.30 Breakfast Breakout Session

Who wants to be a non-executive director today?

Philippe Haspeslagh Professor of Business Policy, INSEAD, France

Moderator, Jacques-Etienne de T'Serclaes, Global Retail & Consumer Leader, PricewaterhouseCoopers



# Morning Session

## AM

Friday, 18 June

## Brand *Italy*

Brand *Italy* is powerful in its automatic association with food, coffee, wine and an entire spectrum of upmarket luxury brands across the fashion, design and motor industries. This session looks at brand value through case studies that encapsulate Italy's unique success as a brand and provides global-local learnings for the food business.

Moderator, Frances Edmonds, Author & Broadcaster

## Food *Italy* – nourishing the body, satisfying the soul

Giovanni Cobolli Gigli

Chairman of Rinascente and President of FAID

09.00 Retailing in a Food Culture

09.30 Turning Italian specialties into global brands

Case studies to include:

*Barilla, a family-run, multinational company manufacturing pasta and a range of Italian cooking products.*

Guido Barilla

Chairman, Barilla Group

Carlo Petrini

President & Founder of the Slow Food Movement  
*(to be confirmed)*

Slow Food: an endangered species? How did the Slow Food Movement emerge and why in Italy? What are the implications for food retailers throughout the world?

*Slow Food is a movement "for the protection of the right to taste", with 60,000 members in 5 countries.*

11.00 Refreshment Break

## Design *Italy* – dressing the body, pampering the soul

Case studies in Style, Design, Desire.

Guest Speaker

11.30 Marketing Italian leather brands globally

Re-establishing the exclusivity and profitability of an Italian fashion brand

Guest Speaker

12.00 Fuelling the legend of the Italian sports car

12.30 Lunch



# Afternoon Session

PM

Friday, 18 June

## All Roads Lead To People

People are at the core of the retail business, but remain its most fragile asset. How can we apply innovation to re-inspire employees and consumers alike? This session will focus on maximising value to and from our people.

*Moderator, Frances Edmonds, Author & Broadcaster*

**René Carayol**  
Author and Broadcaster

### 14.00 **Fire, Ready, Aim -**

#### **Winning through people in tough times!**

Nothing stays the same forever, not even food, and definitely not the food industry. Business will be harder in the future because customers have become more discerning, they know they have choice, and they are increasingly worried about what they eat. The winners will be those companies that can deliver through their people.

*René Carayol spent 15 years in retailing. He is author of "Corporate Voodoo", and expert witness on the BBC television series "The Mind of a Millionaire". Today he advises some of the world's leading businesses.*

**Christoph Grunenberg**  
Director, Tate Liverpool

### 14.40 **'I Shop therefore I am'**

The Tate exhibition "Shopping : A century of Art and Consumer Culture", showed how shopping and culture feed upon each other. The gallery's director will consider how retailers can and must continue to be the playgrounds of innovation.

*Tate is a family of galleries operating on four sites in different parts of Britain. Tate Liverpool opened in 1988 and is the home of the National Collection of Modern Art in the north of England.*

**Robert Swan**  
Polar Traveller  
& EU Ambassador for the Environment

### 15.20 **Keynote closing address** **Leadership on the edge**

*Robert Swan is the first man ever to walk to both the North and South Pole.*

## Evening **Official Gala Reception and Dinner**



# Store Visits Programme

An optional store visits programme will be organised on Wednesday, 16th June 2004 in the morning. This programme will include visits to the four retailers listed below. Should you wish to participate, please tick the Store Visits option on the registration form. Precise timing will be communicated in May 2004.

The tour will start from the official hotels and finish at the Hilton Cavaliere.

## → Food Retailing in Italy:

### A Brief Overview

Compared with other major European markets, the level of retail concentration in Italy is relatively low. The top five grocery retailers capture just less than 40% of the market, compared with 75% in France and almost 70% in Germany. Although there has been a shift towards large-scale, out-of-town units in recent years, there remain a huge number of small and independent outlets. Reflecting the North-South economic divide, retail concentration is conspicuously higher in the more developed North.

However, consolidation is gradually occurring. At the beginning of 1998, the government started deregulating the retail sector, making it easier to obtain licences for new outlets, in particular for large store development. As a result, Italy has an increasingly well-developed hypermarket sector, which probably leads the rest of Europe in terms of style and appearance. The major hypermarket operators include French groups Carrefour and Auchan, as well as domestic retailers Coop Italia, Conad and PAM.

### Italy: Leading Grocery Retailers, 2003

| Rank | Company (Country of Origin) | Food Sales    | Market    |
|------|-----------------------------|---------------|-----------|
|      |                             | 2003 (EUR mn) | Share (%) |
| 1    | Coop Italia (IT)            | 8,607         | 11.8      |
| 2    | Carrefour (FR)              | 5,692         | 7.8       |
| 3    | Conad (IT)                  | 5,143         | 7.1       |
| 4    | Auchan (FR)                 | 4,037         | 5.5       |
| 5    | Esselunga (IT)              | 3,043         | 4.2       |
| 6    | PAM (IT)                    | 2,048         | 2.8       |
| 7    | Finiper (IT)                | 1,498         | 2.1       |
| 8    | Rewe (DE)                   | 1,496         | 2.1       |
| 9    | Metro Group (DE)            | 1,400         | 1.9       |
| 10   | Lombardini (IT)             | 1,122         | 1.5       |

Despite the growing popularity of hypermarkets, Italy remains a classic supermarket country.

Supermarkets are still favoured by the Italians because they simply like to go shopping for groceries on a daily basis and many of these stores essentially function as modern neighbourhood stores. Discount stores have expanded slowly in Italy, but there are now a number of reasonably-sized rapidly-growing chains such as Germany's Lidl, local operator EuroSpin and Coop Italia's Di.Co. banner.

To date, large Italian multiples do not have a full national presence and are especially weak in southern Italy. In order to strengthen their competitiveness against modern, mostly foreign-owned companies, a number of local retailers have been looking for foreign partners with whom they can combine their activities in Italy. The country's major retailers are also looking to increase the proportion of own-brand goods they sell. Although manufacturers' branded products are still favoured by most consumers, own brands are gradually becoming more popular.



Source: M+M Planet Retail – [www.planetretail.net](http://www.planetretail.net)

### Auchan Rinascente

Auchan Rinascente is a Franco-Italian retail group with activities in grocery retailing, department & variety stores and DIY outlets. Its 37 Auchan hypermarkets are spread across Italy and have recently been overhauled to split the stores into themed areas. The group's other grocery retail chains include over 1,000 Sma, Cityper and Punto Sma supermarkets and neighbourhood stores with a strong focus on impressively merchandised fresh foods.



### Carrefour

Europe's largest grocer, has a strong position in the Italian market thanks to its merger with Promodès in 1999. The integration of Gruppo GS made the French operator the largest integrated retailer in the country. In line with its group strategy, Carrefour has a multi-format model in Italy, trading through 40 Carrefour hypermarkets, 356 GS supermarkets, nearly 650 Di Per Di convenience stores and 12 Docks Market cash & carries. The hypermarkets adhere to the standard Carrefour model – impressive grocery ranges (with a strong own brand penetration) and extensive non-food departments adding up to create a genuine one-stop shop. Future growth for Carrefour looks set to depend on further hypermarket and convenience store openings, although the introduction of discount stores cannot be ruled out.



### COOP Italia

COOP Italia is the clear market leader, trading through an extensive network of hypermarkets (63 Ipercoop stores), supermarkets/neighbourhood stores (over 1,000 Coop units) and discount stores (over 200 Di.Co outlets). It oversees the operation of nine major regional co-operative groups and hundreds of smaller groupings. It is one of very few Italian grocery retailers to have ventured abroad, opening stores in Croatia in late 2002. Other ongoing initiatives include the opening of stores in southern Italy and the forging of closer links with French retail group ITM (Intermarché). Coop stores are highly regarded for the quality of their fresh food merchandising.

### Gruppo PAM

Gruppo PAM is the country's sixth largest grocery retailer and is active in a variety of market segments. Its flagship stores are its 17 Panorama hypermarkets, which enjoy a good reputation for local food products. PAM also operates over 200 supermarkets under the PAM, Supéral and Metà (franchise) banners and is the country's second-largest hard discounter with the In's chain. The company's Tesori dell'Arca private label range is well respected; it encompasses over 700 lines sourced from a variety of Italian suppliers.

Source: M+M Planet Retail ([www.planetretil.net](http://www.planetretil.net))



# An Invitation to Partners

Summit delegates' spouses are very welcome at The Summit. The whole Summit – all business sessions & the social events - is open to partners. The traditional Partners' Day will continue to offer a cultural alternative on Day Two, Thursday 17th June.

Attend The Summit: Get up-to-date on current affairs, meet friends & peers from around the world, and enjoy elegant soirées in some of Rome's most magical venues. - All in one of Europe's most magnificent cities ! It's the one event in 2004 you can't miss !



The business sessions & social events to which you are cordially invited are outlined on pages 5 to 9.

We especially recommend attending 'Brand Italy' on Friday morning followed by a lunch prepared by Chefs from Barilla.

Partners' Day, the cultural alternative for Thursday, 17 June, includes

## Morning

### Piazza del Campidoglio

Discover the heart of Rome's past from the heights of the Renaissance Piazza del Campidoglio. Designed by Michelangelo, it offers a unique panoramic view over the Forum and the Coliseum.

### The Galleria Borghese

The Galleria Borghese, hailed as the 'queen of private collections', reflects the exquisite taste of Cardinal Scipione Borghese, who collected masterpieces by Canova, Bernini, Caravaggio, Raphael, Rubens and Botticelli, to name but a few.



## Lunch

a taste of Italian Modern Art at the Galleria Nazionale D'Arte Moderna. Built for the 1911 Rome International Exhibition, the neo-classical palace houses a comprehensive collection of works by the Italian impressionists, the Italian futurists, as well as international masters.



## Afternoon

The day continues with an optional visit to St Peter's Basilica where the divine majesty of the World's largest church meets the artistic grandeur of Italian Masters.

Throughout the day, groups will be accompanied by multilingual professional guides. Groups will depart from and return to the Official Hotels. Should you wish to attend this programme, please respond to the detailed invitation which you will receive in May 2004 from Danone, Official Sponsor of the Partners' Programme.

Please read Summit Practical Information on page 14.

If you would like assistance from a CIES team member, please call: +33 1 44 69 84 84.

# Rome, Italy

Rome is the city where contrasts come together: the past and present co-exist everyday, the infinitely great meets the infinitesimal, and the peaceful ruins witness the modern Italian creative frenzy. In Rome, time and beauty are measured on an altogether grander scale. Old meets new in the city that offers *la dolce vita* like no place else in the world.

## → Wander the wonders of Rome

Amble through the city's cobbled streets to discover some of the most beautiful and popular *piazze* adorned with majestic fountains.

## → Let the city's history cast a spell on you

Rome is often described as an open-air museum. Be prepared to travel back in time while walking from a Baroque basilica to a Renaissance palace, Medieval bell towers and early Christian churches, Imperial temples, Republican meeting rooms and Etruscan tombs.



## → Savour *la cucina italiana*!

Touring Rome can leave anyone hungry for that authentic Italian taste. So enjoy a traditional Roman dish in a neighbourhood *trattoria* or stop at one of the countless *gelaterie*, offering an oasis of icy delights. In the evening, eat out as Romans often do, and live the high life at Rome's newest designer restaurants.

## → On the front line of fashion

From *Piazza di Spagna* to *Piazza del Popolo*, Rome, a boot-step from Milan, will keep you at the height of style. Italy is renowned for its top-quality designer clothes, shoes and leather accessories. You will find no shortage of choice as you wander its busy streets. Rome's side streets are also full of surprises: from the craft workshops around *Campo dei Fiori* to the centuries-old herbalists. Antique bookshops around *Piazza Navona* thrive next to cutting-edge design stores and innovative, high-quality boutiques.

## → Learn the universal language of art

Leave Italy for a few hours and visit the gargantuan Vatican museums in the Holy See. Five-hundred-year-old art collections await you, such as the "Cappella Niccolina" with paintings by Beato Angelico, the "Appartamento Borgia" with decorations by Pinturicchio, the "Stanze" painted by Raphael and, of course, the Sistine Chapel with frescoes by Michelangelo.

## → New!

CIES has designed a Rome Insider Guide Book for Partners featuring detailed information in English on all of the above and much more. We have designed guided tours in and around Rome to make sure you don't miss out on any of what the Eternal City has to offer!

Please request your electronic version at [summitinsider@ciesnet.com](mailto:summitinsider@ciesnet.com)



# Practical Information

## → Summit Location

Hilton Cavalieri, Via Cadlolo, 101, 00136 Rome, Italy

## → CIES Welcome desk

The CIES team will be ready to welcome you to The Summit as of 9 am on Wednesday, 16th June in the Hilton Cavalieri. Delegates and partners attending The Summit are invited to collect their kits & nominative badges from the welcome desk before attending any events of the Summit.

## → Badges

Delegates and partners must present their badges upon arrival at all Summit events.

## → Cyber Café

A business and messaging centre will be available in the cyber café, sponsored by KPMG. It will be open as of 9 am on Wednesday 16th June in the Hilton Cavalieri for the duration of The Summit. Contact details for the message centre will be posted on [www.ciesnet.com](http://www.ciesnet.com) in June.

## → Working Languages

Simultaneous interpretation will be provided in English, French, German, Spanish, Italian & Japanese during the plenary sessions, subject to a minimum number of 10 delegates per language group.

## → Partners

Delegates' spouses are welcome at The Summit. The whole Summit – all business sessions & the social events - is open to partners. Plus, the traditional 'Partners Day' will continue to offer a cultural alternative on Day Two, Thursday 17th June.

Please refer to page 12. Partners should register for The Summit by means of the delegate registration form or the Summit website.

## → Store Visits

A store visits programme will take place on Wednesday, 16th June 2004 in the morning. Please refer to page 10 for an outline.

Should you wish to participate, please tick the Store Visits option on the registration form. Precise timing will be communicated in May 2004.



## Access / Transport

Rome's main airport is *Leonardo da Vinci*, commonly referred to as *Fiumicino*. It has direct flights between Rome and most European cities. Regular domestic flights connect Rome to all major Italian airports. The majority of these are operated by Airitalia and its subsidiary airlines.

The four Official Hotels are a 45 to 60 minutes drive from *Fiumicino* airport, where taxis are readily available.

Transfers will be arranged between the four hotels (Hilton Cavalieri – official Summit location, Parco Dei Principi, Saint Regis Grand and Westin Excelsior hotels), and the official evening functions for the duration of The Summit.

## Map

A map of Rome can be found on [www.ciesnet.com](http://www.ciesnet.com) and on the inside back page of this programme.

## Visas

Delegates are invited to check with the Italian embassy in the country where they have citizenship for up-to-date information on any visa requirements.

## Tourist Information

The official receptive agency in Rome for The Summit 2004 is Gastaldi Global For tourist or practical information on Rome or Italy at the time of the Summit, the Gastaldi Global team will be delighted to help.

## → Accommodation

A number of rooms at preferential rates have been provisionally reserved for Summit delegates in the Hilton Cavalieri, Parco Dei Principi, Saint Regis Grand & Westin Excelsior hotels. The accommodation of delegates at Summit 2004 will be managed for CIES – The Food Business Forum by the French agency, LSO.

### The Country Club Experience

#### Hilton Cavalieri

The Hilton Cavalieri is situated in a 15-acre private Mediterranean park, panoramically overlooking the historic centre of Rome. This 5-Star deluxe hotel is the only "resort within the city" offering truly unique features. A highly prized private collection of furniture, paintings, tapestries, statues and artefacts is housed throughout the public spaces and suites. All rooms have balconies. Guests can relax in the hotel spa and Turkish bath or simply lay in the sun by the pool.

Views of the eternal city can also be enjoyed during dinner at the Pergola, a 2 Michelin star restaurant.

A complimentary shuttle bus will take guests to the city centre in 15 minutes.



### Green Rome

#### Parco dei Principi

The Parco dei Principi faces the Villa Borghese. Surrounded by a botanic garden that is unique for its size and variety of plants, the hotel is a corner of paradise in the heart of Rome.

The hotel offers comfortable guest rooms elegantly furnished in traditional decor and with a balcony offering a view on the private park. Facilities include the latest in fitness equipment as well as an outdoor pool. Guests can also enjoy the finest of Italian cuisine in one of the hotel's three restaurants.

## For Shopping & Culture

### Saint Regis Grand

Built in 1894 as the first deluxe hotel in Rome, the St. Regis Grand is within walking distance of the Spanish Steps, the Trevi Fountain and the Via Veneto.

Vivendo, the award winning restaurant, provides a sophisticated environment with a contemporary atmosphere. The private wine cellar, "Di...Vino" was selected to be "depositaire de l'enotheque Dom Perignon" and provides a private dining experience with regional and international menus. An English-style butler service is available, on dedicated floors, to attend to guests' requests 24-hours a day. A personal shopping service can also be reserved.

### Westin Excelsior

As Rome's most celebrated avenue, Via Veneto is the cradle of "La Dolce Vita" immortalised by Fellini. It is also the home of the recently refurbished Westin Excelsior, Rome. This hotel is a monument to turn-of-the-century style. The spacious guest rooms boast rich custom fabrics, Imperial, Renaissance and Biedermeier style furnishings, as well as walls and ceilings hand-decorated by master artisans. Post shopping relaxation can be enjoyed at the new Health and Fitness Centre which includes an indoor pool, sauna, steam bath and treatment rooms.

## → Any Questions?

For tourist information on Rome, contact Gastaldi Global:  
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For Summit registration and hotel booking service, contact LSO/CIES Summit Secretariat:  
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[www.ciesnet.com](http://www.ciesnet.com)

For registration & accommodation and latest information on speakers, stores, Rome. All you need to know about The Summit 2004 !

# Sponsors

CIES The Food Business Forum would like to thank the following companies for their generous support of The CIES World Food Business Summit 2004:



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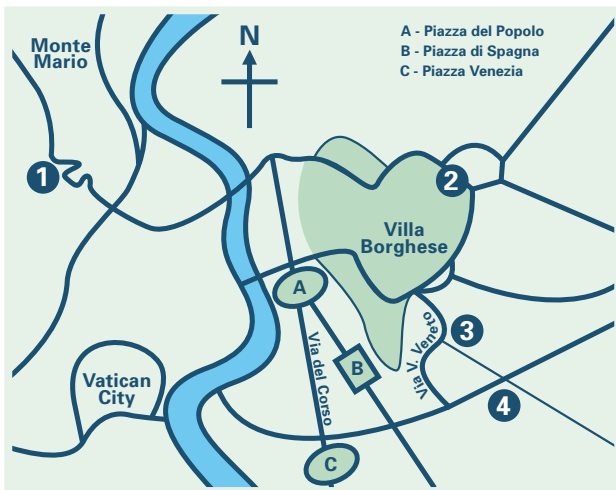
Official Gala Reception & Dinner  
*Friday*



Official Summit Cocktail  
*Thursday*



Delegate Lunch  
*Thursday*



## Official Summit Hotels

### 1. Hilton Cavalieri

(Summit location)  
Via Cadlolo, 101  
Rome 00136, Italy

### 2. Parco dei Principi

Via G. Frescobaldi, 5  
Rome 00198, Italy

### 3. Westin Excelsior

Via Vittorio Veneto, 125  
Rome 00187, Italy

### 4. St. Regis Grand

Via Vittorio Emanuele Orlando, 3  
Rome 00185, Italy

# The World Food Business Summit

Please consult the CIES website for news on  
The World Food Business Summit 2004, to book on-line  
or for details of other CIES activities at

[www.ciesnet.com](http://www.ciesnet.com)

CIES - The Food Business Forum is the only independent global food business network. It serves the CEOs and senior management of 175 retailer and 175 supplier member companies, and their subsidiaries, in over 150 countries by:

- Providing a **neutral platform for knowledge-exchange, thought-leadership and networking**. CIES services are channelled through international conferences, benchmarking studies, publications and tailor-made member services. Current programmes include the Global CEO Forum, the World Food Business Summit, Management Development and the functional areas of Marketing, Information Technology and Supply Chain Management.
- **Orchestrating positions and developing tools on key strategic and practical issues affecting the food business**. These top-of-mind issues are identified by our ten retailer-led committees and taskforces. Priority projects include the Global Food Safety Initiative and the Food Business in Society Initiative.

CIES - The Food Business Forum has been growing with the food business for over 50 years. Its strength lies in the active commitment of its member companies and its privileged access to key industry players.

CIES retailer members alone generate over \$2,000 billion, employ 4.5 million people and operate close to 600,000 stores representing a total sales area of 160 million square metres.

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