

english summary

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A sensitive increase of the confidence climate within the economic context is recorded, as shown by the tenth edition of the economic Indicod-Ecr Observatory.

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People go less frequently to beautician's and hairdresser's, without renouncing to beauty creams and cosmetics, more and more often purchased in the big distribution centres.

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Different from what happened in other sectors, the Italian pasta industry resisted well in 2009, and kept even growing, mainly thanks to the optimum quality/price relationship.

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The balsamic vinegar of Modena is one of the Italian excellences in the world. Due to its mainly export market, it finally found the IGP protection.

BEER

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The Italian beer industry lived a strong increase during the last few years. Now the figures linked to production, jobs and earnings guaranteed by the sector are remarkable and deserve a deep analysis.

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New scenarios are looming on the horizon for the meat market, more and more influenced by the changed food styles, renewed consumption habits and new born distribution channels.

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The household articles market, particularly for the kitchen, must face a mass of more and more demanding consumers, looking for a correct quality/price relationship.

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The lingerie-sea wear-collants sector is resisting to the crisis much better than other textile-clothing segments. The most successful line is a right mix between quality and reasonable prices.

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In a general scenario dominated by the reduction of consumptions, all types of insecticides keep growing, with the help of the arrival of frightening new species, like the tiger mosquito, on our territory.

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Italy is preparing to trace any medicine pack. A project is being studied to provide the maximum safety to

the consumer and, in addition, to fight the illegal drug trade.

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The technical fabrics are strength of the made in Italy. In spite of crisis and strong international competition, the capability of offering innovative materials to the market is still winning.

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THE FORUMS BY LARGO CONSUMO

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The purchase process, ranging from suppliers' pre-qualification to execution, is a distance whose performances must be measured to reduce wastes and inefficiencies: a debate is going to be held in Milan among enterprises.

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In such a difficult period as the current one, it is essential to get the maximum from own resources, optimizing each operating phase within the sales points.

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There are presently a lot of brands in Europe that chose a trade affiliation. A recent survey considers the sustainability of this collaboration formula.

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Express, long, spotted or American, coffee remains a very popular product both in the home consumption and the food service. And Italy maintains habits that are very different from the rest of Europe.

Refreshment in brief page 75

COMMUNICATION

PROFILES

CONSORZIO TUTELA CILIEGIA MAROSTICA IGP (pages 80-81). Mantua The Cherry from Marostica, IGP since 2001, is cultivated in a typical zone of the Vicentino, and guarantees a production of over 11.000 quintals per year. A new packaging and some valorisation programmes were launched to better introduce one of the agricultural and food excellences from Veneto.

MEETINGS

CONSORZIO OLIO EXTRA VERGINE OLIVA (pages 12-13). Which are the most effective strategies to value the Italian extra virgin olive oil in the current international competition? A round table, held on last April 8th at Sol-Vinitaly and organized in cooperation between Consortium and Largo Consumo, was dedicated to "The high quality in the future of the Italian extra virgin olive oil. A compared supply chain".

AWARDS AND PRAISES

SALONI INTERNAZIONALI FRANCESI (pages 4-5). The conference of the Giury held on 10th and 11th May in Paris, reached a key moment with the 2010 edition of Sial d'Or that every two years rewards the most successful innovation in the world. Here are the Italian finalists.

INTERVIEWS

FERRARELLE (page 98). In 2005, LGR Holding spa acquired Italaquae spa from Danone and founded Ferrarelle spa. The company has committed for five years in creating a wide plan of re-organization and development. In last March, the company announced the strategies for the future: Antonio De Caro, marketing director illustrates them.

ITALCARNI (page 48). The market of the pork meat is living a phase of impasse, prelude to a necessary renewal of the offer and the structure of its protagonists. Marco Sola, commercial and marketing manager of the sector leader Italcarni, is convinced about it.

PARMACOTTO (page 50). Parmacotto, just back from Cibus 2010 and the opening, at the end of March, of its new and very modern plant, is living an intense year, characterized by a strong commitment on several fronts. We speak about it with Stefania Rosi, marketing manager of the Group.

CONSUMERS

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Italians, in spite of the economic difficulties, do not renounce to tasteful food and keep looking for quality products, best if coming from the domestic territory.

INDICATORS

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A new functional pointer, called Carocibo, helps us in monitoring how our food expense varies and which are the differences at territorial level, characterizing the anomalies of the Italian row.

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Scent of woman page **85**
The cosmetics market in Italy suffers but resists. As shown by a recent research, the female consumers spend paying greater and greater attention; and the traditional channel suffers the consequences of the situation.

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A research by the Ufficio Studi Confcommercio offers a complete scenario of the expense made for the house, starting from the rental and passing through the bills to reach the furnishing, supported by the European citizens in 2008.

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2009 wasn't actually an easy year, and the figures put the operators to a hard test. New hopes and fears are also linked to the media mix change.

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Starting from data collected by Beverfood, the situation on the variegated packaging market for soft

drinks is cleared up, among bottles, small bottles, cans, cardboards and very new detailed solutions.

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In every sales point, before going out we must pass the checkout counter. In this field the producers direct their efforts towards research, trying to optimize times and simplify all the operations.

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Which consequences had the crisis on the Italian food industry? Mainly: how have wages changed in this sector and which are the future perspectives?

ON-LINE

All in the network page **114**
The new professional figure of the on-line buyer who operates on the web and exploits the Internet and its potentialities, is going to get more and more importance. This is a new, very demanded role, born with the e-commerce.

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The crisis that in 2009 brought Europe to its knees didn't spare the retail, one of the most penalized sectors. The investment volume was very low, but there are good expectations for 2010.

REAL ESTATE

The point on the logistic Europe page **121**
In spite of the growth recorded in the second half of 2009, the total takeover values remained however on low levels almost in all Countries, excepting Russia.

BALANCES

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In 2009 the agricultural-forest and food cooperation joining Legacoop performed good result and confirmed the data relevant to its own validity.

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ENVIRONMENT

TRACEABILITY

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A new control system, called Sistri, will be active from next summer aiming at guaranteeing a complete traceability of this kind of partially dangerous waste.

SPECIAL WASTE

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The moment came to seriously face the disposal of Raee and other special waste, very often come illegally boarded on ships sailing to China, India or Africa.

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Careful with computers page **130**
Data centres produce as much carbon dioxide as planes, but producers have already intervened to solve this situation, first at domestic level, then at customers'.

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INDEX & MONITORING

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Here is the monthly customary view on food, non food and energetic raw materials.

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In February 2010, the Indicatore dei Consumi Confcommercio recorded an increase equal to +1,4% in the trend and a drop equal -0,5% compared with the previous month.

Consumers' confidence page **138**
The Italians' confidence sinks again into the levels of one year ago: this is the outcome of data collected by Monthly Findomestic Observatory in March.

Reading paths page **141**

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COMPANY CASES

UNES (pages 66). The retailer supported, as academic sponsor, the High Formation course "Temporary Space & Exhibition Design - Design for the innovation of exhibition and temporary spaces" promoted by POLI.Design, the Consortium belonging to the Polytechnic of Milan.

FOCUS

ARBOREA (page 51). 3A is presently processing in its new plant, the largest and most technologically advanced in Sardinia, over the 90% of the entire insular production of cow's milk, equal to 550.000 liters of milk that every day comes from 300 associate breeding companies.

BOSCHI FOOD & BEVERAGE (page 105). Boschi Food & Beverage spa creates Swoop, a new brand for a complete line of juices and nectars for the first price segment. The Emilian company has tuned 22 articles for people who want to have, from the same supplier, a wide choice of recipes in several formats.

LA VIS (page 67). La Vis proposes "Percorsi D'Altura", an absolutely high-quality original product range composed of cuvée that tie the selections of various vineyards, in a varietal key. It concerns seven products, six of which are white berry and one ha got an inevitable Pinot Nero..

SALOV (page 97). Sagra, historical brand of quality olive oil, totally renews its own image. A new logo, a new bottle and new labels are the aesthetic changes of Sagra to taste also with the other senses the pleasure that the palate has known for years.

SPOT

GRUPPO COIN (page 129). On the occasion of the event "Be Natural", closed in all the Italian stores on last April 25th, Coin has for the first time joined the plan "No to Greenhouse effect - Emission Free", in collaboration with Echo-Way, a consulting company operating in the climate change field.

LAVAZZA (page 73). To celebrate the 15 years of the historical television campaign "Paradise", Lavazza decided to reward the most faithful consumers with a promotion that offer as a prize a collection of exclusive designed items inspired by the Paradise.

NESTLÉ ITALIANA (page 89). Nestlé Gelati Motta introduces for the next warm months some interesting innovations. Pirulo is the longest fantastic and playful ice lolly of the summer, side by side with Hello Kitty vanilla and strawberry ice cream.