

# english summary

## PUBLISHING CONTENTS

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### COLUMNS

<b>Fairs</b> .....	pag. 47
<b>Top retail</b> .....	pag. 63
<b>Study &amp; Research</b> .....	pag. 97
<b>Enterprise documents</b> .....	pag. 99
<b>Profiles &amp; Careers</b> .....	pag. 119

### DAYBOOK

<b>Finance</b> .....	pag. 6
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### TRENDS & SCENARIOS

#### ENTERPRISES AND INNOVATION

<b>The partner brand</b> .....	pag. 8
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*Investments and attention towards brands are intensifying, both due to the consumers' evolution, and the consequence of recent events (crisis). And the ethical values that the brand must satisfy are changing as well.*

#### ENTERPRISES AND CONSUMERS

<b>Quality in... the canteens</b> .....	pag. 10
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*The outdoor food consumption became more and more significant in the time. The outdoor market has presently a very imposing turnover.*

### ENTERPRISES' STATUS

#### PASTA PRODUCTION

<b>Spotlights on pasta Zara</b> .....	pag. 12
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*The company located in Veneto has operated in the production of alimentary pasta for over a century and it is the first Italian exporter and the second domestic producer.*

### MARKET FIGURES

#### PERSONAL CARE

<b>Turnover well-being</b> .....	pag. 14
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*The growth driver of personal care is represented by innovation. Moreover, what mainly characterizes this sector*

*compared to others of the consumer goods market, is the insufficient penetration of the trades mark.*

### PRODUCTION

#### FRESH PASTA

<b>Not for special occasions only</b> ...	pag. 17
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*Italians are consuming more and more ravioli, tortellini, lasagne... Though being unable to compete with the cheapest dried pasta, this sector shows great vitality, thanks to advertising, promotions and offer variety.*

#### KITCHEN

<b>Without getting hands dirty</b> .....	pag. 23
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*The machines dedicated to food preparation are successful in Italy. Ice creams and coffee makers and bread machines are more and more comfortable and beautiful to be seen.*

#### FRUIT JUICES

<b>The consequences of a worm-eaten apple</b> .....	pag. 25
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*A survey by Agrioinnova focuses on the patuline contamination (that appears with the first rot signs) in the fruit used to produce juices or drinks made up of fruit.*

#### SEEDS

<b>All starts from a good seed</b> .....	pag. 28
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*The Italian sector of seeds production is well advanced in Europe. The research covers a more and more fundamental role, but there is the need for greater protection and transparency in a market where illegality is present.*

#### DRUGS

<b>How to take care of ourselves without going to the doctor's</b> .	pag. 30
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*A study analyzes the Italian market of over-the-counter drugs. Turning to reimbursements provided by the National Health System, poor innovation and proliferation of alternative products makes the situation complex.*

#### DISPOSABLE TABLEWARE

<b>Disposable tableware every day</b> .....	pag. 33
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*It resists to the crisis of plastic and paperboard cutlery market, objects that allow to save time and money, without using dish washers and washing up liquids.*

#### NUTRACEUTICS

<b>Following nature</b> .....	pag. 37
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*The nutraceutical market is strongly expanding not only in Italy. Thanks to integrators, diets, natural substances, it is possible to live better and also prevent serious pathologies.*

### CAR CARE

<b>What is behind a sparkling hood</b> .....	pag. 39
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*Italians are fond of holding their car clean and decorous. They are less and less people who wash their car by themselves, thus advantaging more and more efficient car wash systems.*

<b>Production in brief</b> .....	pag. 41
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### DISTRIBUTION

#### FORUM – PRIVATE LABELS

<b>Certified safety for the private labels</b> .....	pag. 48
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*Reliability is a founding value for the private label, and helps in strengthening the confidence towards the label. A debate was attended by retailers and industry, certifiers and crisis managers.*

#### MERCHANDISING

<b>Matter of feeling</b> .....	pag. 53
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*The stores are being transformed: they are not shopping places anymore, but means of communication between industry and distribution "to catch" the consumers' sensibility and address their purchasing behaviours.*

#### SCHOOL PUBLISHING

<b>Cheap handbooks</b> .....	pag. 57
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*In such a difficult period as the present one, it is fundamental to try new means and new paths to make the prices of school books more affordable. To this end, the big distribution plays a prominent role.*

<b>Distribution in brief</b> .....	pag. 61
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### REFRESHMENT

#### ALIMENTARY HABITS

<b>Great innovations on the table</b> .	pag. 65
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*Either restaurants or pubs, fast food or self services are concerned, the relationship between Italians and food consumption outdoor is changing, as it is happening at home.*

<b>Refreshment in brief</b> .....	pag. 70
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### CONSUMERS

#### INFORMATION

<b>The ham's secrets are on the label</b> .....	pag. 73
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*The label attached to salami is a basic information tool for the consumer. The situation concerning norms and regulations is continuously progressing.*

## COMMUNICATION

### COMPANY EVENTS

**GRUPPO TESI** (pages 106-107). How can Ict help the distribution enterprises to effectively face the challenges of the global crisis of these years? Which is the right partner to trust to? This topic was discussed in the second convention of Gruppo Tesi, the Italian leader in the high added value solutions for the retail world.

### AWARDS & RECOGNITIONS

**SALONI INTERNAZIONALI FRANCESI** (pages 4-5). The International Jury of Sial d'Or - the prestigious award promoted by the Salon International de l'Alimentation of Paris to reward the most successful innovation in the world - returned the verdicts relevant to 2010 edition. Among the top protagonists we find Martini Soda that obtained the world Sial d'Or in the Alcoholic Drinks Category.

### I CONVEGNI

**CUOA** (pages 114-115). The Fashion, Lifestyle & Retail Area and the Retail Management and Marketing Master of the Cuoa Foundation promoted, with the partnership of Largo Consumo and the sponsorship of Aidp (Italian Association for the Personnel Management), a round table on the topic: "Valorization of the human resources in the modern distribution".

### INTERVIEWS

**LA VIS** (page 43). The La-Vis Group keeps carrying out the development strategy in the modern trade. We speak about it with Domenico Scimone, commercial manager of Ethica, the company that coordinates the business and marketing activities of the Group.

**NECTAR – FIDELITY CARD** (page 96). Three months after the launch, it changed the scenario of the fidelity cards: we are speaking about Nectar, the first independent "loyalty coalition programme", that gathers the retail companies active in the Italian market. We speak about it with Gerard Whelan, managing director of Nectar Italia.

**REWE GROUP** (page 62). In the last months the company decided the rebranding of Standa, spreading the Billa brand also in Italy: a step not only symbolic for Rewe that starts the launch of a new development and consolidation strategy in our Country.

**UNOLOMBARDIA** (page 44). Unolombardia is the only O.P. (organizations of producers) association operating in the region, with the objective of promoting and making more and more productive, efficient and profitable the activity of operators in a healthy sector. We speak about it with Ambrogio De Ponti, president.

### COMPANY CASES

**ERIDANIA SADAM - ZUCCHERO** (page 98). On the occasion of the recent Cibus of Parma, within the exhibition space of Eridania Tate & Lyle, Eridania - in co-operation with IED Professional - introduced "Eridania Experience": new concepts of retail experience relevant to sweetening shelf.

### COMPANY MEETINGS

**COPAİM** (page 42). The inauguration ceremony of the new Copaim plant of Albinia (Gr) for the production of fresh gastronomy, was held on last 13th April 2010. With this new infrastructure, the company passes from the present 3,000 sm to 14.000 sm of total commercial area.

### PRODUCTION INNOVATIONS

**RCH** (page 60). The touchscreen technology breaks into the commerce world

## FIDELITY

**Tailored prizes** ..... pag. 75  
The loyalty strategies already cover a fundamental role within the big distribution world. The companies are constantly looking for the better way to satisfy, spoil and bind customers to them.

## WATER

**A transparent taste** ..... pag. 77  
We drink a lot of water, at home, at the restaurant, between meals; nevertheless we do not know anything on its qualities and peculiarities. But times changed: the "charter of mineral waters" finally arrived.

## FOOTWEAR

**Walking slowly but with style...** pag. 79  
Also the footwear sector, one of the strengthens of the made in Italy, suffers the consequences of the crisis, but this does not stop the creativity of the producers, who aim at quality and innovation.

## TTRENDS

**Vacations for all tastes** ..... pag. 80  
The tourism industry has already understood that the gay & lesbian market must be held in strong consideration, since it provides optimum revenues. In fact, the homosexual tourist spends on the average more money than the heterosexuals.

## LEGISLATION

**Never again!** ..... pag. 81  
From January the so-called "Class Action" came into force in Italy: it is a collective legal action that protects groups of consumers having suffered the same swindle from a company.

**Consumers in brief**..... pag. 83

## COMMUNICATION

## FAIRS

**Few but always fruitful days** ... pag. 87  
In spite of the effects of the economic crisis, the fair is a mean that keeps working very well, even if the Italian scenario is characterized by an excessive dispersion of the events.

## NAMING

**To the search of a right name** ... pag. 91  
A brand without an impact name will never be successful. That's why there are more and more companies that dedicate their efforts to deep considerations about the "perfect word" and ask the support of professionals. This is why they are more and more .

**Communication in brief** ..... pag. 94

## PACKAGING

## ECOSUSTAINABILITY

**Less and more "green" packages** pag. 101  
A recent search runs upon the analysis of consumers' opinion about the environmental sustainability and the packaging recyclability, basic elements to drive the purchasing choices.

**Packaging in brief** ..... pag. 105

## LOGISTICS

## RFID

**Replace the bar code?** ..... pag. 108  
After some growth phases the Rfid technology is presently an interesting solution not only for many companies of the big distribution, even if the barcodes will not disappear so quickly.

## GEOMARKETING

**Where is it better?** ..... pag. 111  
Today, thanks to a deep knowledge of the territory, companies of any size can make prudent and fruitful choices concerning the opening of new sales points and the management of their own activities.

**Logistics in brief** ..... pag. 113

## HUMAN RESOURCES

## PROFESSIONS

**Fighting the counterfeiting** ..... pag. 116  
The brand protection manager is a kind of detective who supervises the real and the virtual markets, to defend brands and branded products that run the risk of being penalized by imitations and copies.

**Human Resources in brief** ..... pag. 117

## FINANCE

## QUADRO COMPETITIVO

**New challenges for the clothing chains di abbigliamento** ..... pag. 120  
The crisis has obviously affected also this sector that is living a period of great innovation, where realities such as Bernardi Group, Piazza Italia, Sorelle Ramonda and Zara Italia are operating.

## APPAREL

**In the name of speed** ..... pag. 124  
The world of fashion production is changing: the fast fashion modified the purchasing habits of consumers, and consequently the companies operating in this sector had to comply with the situation.

**Finance in brief** ..... pag. 127

## ENVIRONMENT

## SUSTAINABLE TRADE CENTRES

**Watching a little bit further** ..... pag. 128  
The trade centres are modifying in a significant way the territory where they were built. That is why after years of "green" revolution, a new attention to the environmental impact of new structures is expanding.

## DOCUMENTS: WASTE DISPOSAL

**2020 is coming...** ..... pag. 132  
The latest years carried great innovations in the sector of disposals' recovery and waste in our Country, but still a lot shall change to catch up the future objectives fixed by the European Union.

**Environment in brief** ..... pag. 133

## ENERGY

## PHOTOVOLTAIC

**A lot of sun is not enough** ..... pag. 134  
How much energy is produced in Italy by exploiting sunbeams? Decidedly too little, and with large differences among the Regions: a recent research proposes an accurate analysis of the national situation.

**Energy in brief** ..... pag. 137

## INDEX &amp; MONITORING

**Raw materials** ..... pag. 138  
Also this month the usual view on food, non food and energetic raw materials.

**Consumers' confidence** ..... pag. 140  
After the slipping in March, the confidence among Italians is increasing again. On the other hand, the latest surveys do not acknowledge, if not marginally, the effects of the Greek crisis.

**Reading paths** ..... pag. 143  
Information for readers and advertisers.. pag. 144

thanks to RCH, leader in the cash registers sector. The company, located in Treviso, designed and is launching in these days TouchMe, the cash register that introduces in the "Entry level" category new standards and characteristics.

## FOCUS

**ARTEENERGY PUBLISHING** (page 136). EnerSolar+ is the International Exhibition entirely dedicated to the photovoltaic and thermal solar energy. Organized by Arternergy Publishing and Fiera Milano Rassegne, it will be held at Fiera Milano Rho from 17 to 19 November 2010 after the success obtained by the first edition.

**BIRRA FORST** (page 95). Birra Forst launches a new communication campaign created by the Milan agency Cayenne. Starting from May, in addition to press and billpostings, on which the company invested also in the past, there will be also TV and web.

**CARNI NOBILI** (page 71). The company operating in the sector of fresh meat, developed a specialized processing and portioning of the meats selected for the daily supply to the refreshment sector, mainly in Milan.

**CTC TECHNOLOGY** (page 24). Rolando, a CTC Technology brand, announces the entry into the market of "Rolando, the express well-being", the revolutionary automatic coffee, tea and herb tea closed system maker, produced with high-quality materials and items and a completely Italian design.

**FIERA MILANO** (page 88). Fiera Milano has equipped for a long time to give customers the right exhibit space for any need, always with the certainty of highest quality and attention to the optimization of mounting and dismantling times.

**HUHTAMAKI** (page 36). Monoservizio Bibo, founded in Turin in 1938 and become Huhtamaki in 2001, is the ideal choice for all the celebration moments when consumers require functionality, happy colored and funny graphics and high quality materials.

**ID SOLUTIONS** (page 109). Id Solutions, academic spin off by Università degli Studi di Parma, has produced from 2005 integrated solutions based on RFID technology. Thanks to RFID and Internet of objects, the items acquire their identity and are automatically traced, that is without risks of missed identifications.

**PASTAI IN BRIANZA** (page 20). A great passion for the fresh pasta specialties of the Italian regional tradition, a vocation for high quality, a still handicraft production and a modern structure: here are the strengths of Pastai in Brianza.

## SPOT

**CANALI** (page 131). Canali&C. - communication agency located in Milan and Reggio Emilia - after the growth and the evolution of the trade centres sector, lived in the years a regular increase, becoming partner of a lot of projects in Italy.

**INTERMEC** (page 110). Intermec implements solutions that help the companies obtain the highest return on investments from its automatic data collection systems.

**MOLINO PASINI** (page 19). On the occasion of the first edition of PastaTrend, international exhibition of the fresh pasta held in last April in Bologna, Molino Pasini launched Pasta Vip, a new product, checked and tested by the internal research & development center and the best pasta makers.

**TXT** (page 59). For an important debut, an up to the situation partner: in the school year 2010-11, TXT will support Esselunga that, for the first time, is going to enter the direct sales of school books in Italy.

**VOLTAN** (page 21). Voltan Way, the new philosophy that goes over the borders of our Country, aims at spreading the Italian taste worldwide and satisfying the demand of the domestic and international market.