

english summary

PUBLISHING CONTENTS

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COLUMNS

Fairs & Exhibitions	page	45
Top retail	page	61
Study&Research	page	83
Library	page	84
Enterprise documents	page	85

DAYBOOK

Produzione	page	8
Distribuzione	page	10
Finanza	page	13

TRENDS & SCENARIOS

DISTRIBUTION AND TERRITORY

Anti-crisis therapy page **14**
The decrease of self care drugs is compensated by the increase of other free sale products, much more dynamic, also thanks to the strong activities in the field of communication.

TRADITION AND INNOVATION

The experiential marketing in the fashion sector page **16**
Touch screen, soft lighting, well-being centers and restaurants in the sales points: the revolution of the experiential marketing starts from the fashion shops.

STATUS OF ENTERPRISES

COSMETICS

Spotlights on Deborah page **18**
Deborah, an entrepreneurial group with a consolidated tradition in the cosmetic pharmaceuticals sector, recorded in 2008 a turnover increase of 26.1%.

THE FIGURES OF THE MARKET

CONFECTIONERY

Wish to satisfy the taste..... page **20**
The confectionery market faces the crisis with a positive operating result, even if contained, in 2008: last year the production volume had a growth of 0.8%.

PRODUCTION

LEGUMES

The standard bearers of Mediterranean diet page **23**
Lentils, broad beans, chickpeas, dried beans: a concentration of proteins capable of replacing meat. This is why consumers chose them as the base of their nutritional diet.

BAKERY PRODUCTS

The dynamism of snacks page **25**
A rising market saturated at offer level. Partly because producers must run after the consumption trends to win the competition.

SALAMI

The San Daniele has no price! . page **28**
It is one of the Italian specialties, DOP branded, more and more successfully exported and sold mainly the pre-sliced one.

DOMESTIC LIGHTING I

Lights and shadows in the house page **30**
The exit from the market of fluorescent light bulbs, ending in 2012 according to UE Eup Echo-design directive, marks the end of an age.

HOUSEHOLD-ELECTRIC DEVICES

House to house tracking of washing machine..... page **35**
There are a lot of advantages offered by the tracking systems, to know the internal processes, but also to foster customers' loyalty and improve the product.

INFORMATION TECHNOLOGY

The network entered the houses page **38**
Superfast ADSL, IP TV, power line connections,

high speed domestic LAN. The gap between people who knows how to use them and who doesn't is wider and wider.

Production in brief..... page **41**

DISTRIBUTION

FAIRS

Good branded transactions page **46**
After a consolidation in every successive new edition, Marca, the event focused on private labels, is looking towards abroad, to compete over the domestic borders.

TECHNOLOGIES

The store intelligence page **54**
The demand for operating systems centralized on the sales points is increasing. Retailers understood the potentialities, but still remain doubts on the economic return.

SHOPLIFTING

Thieves among the shelves page **56**
More thefts, mainly in Italy, to detriment of distribution, presently linked to a particular moment of crisis. But our retail keeps investing in prevention.

Distribution in brief page **57**

REFRESHMENT

FOOD SERVICE

Putting a strain on outdoor meals page **62**
The insufficient resources compel to few occasions for outdoor meals and to the search of more reasonable solutions. Mainly coffee bars must rethink their strategies.

Refreshment in brief page **64**

CONSUMERS

VIDEOGAMES

At the console table, passionately page **66**
The proposal of titles is more and more addressed to families. It is presently the driving force of the develop-

COMMUNICATION

PROFILES

EFFEFTE (pages 52-53). The company has been the main actor in the development and production of dried buckets for dogs and cats exclusively for private labels and the co-manufacturing for 20 years. Effeffe produces approximately the 70% of private labels.

MEETINGS

ASSOCARTA (pages 6-7). The 16th edition of the Miac held in Lucca (14-16 October 2009) hosted, in the closing day, a convention organized by Assocarta Servizi in cooperation with Miac, entitled: "The sustainability of the tissue production in the present consumption scenario".

INTERVIEWS

CAVIT (page 42). Cavit is one of the most prestigious and known names in the Italian and international wine growing and producing scenario, besides being the standard bearer of production and quality Trentino wines. Enrico Zanoni, general manager, explains how the company has faced this difficult 2009.

ERIDANIA SADAM (page 80). We asked Daniel Bragaglia, managing director of Eridania Tate & Lyle, to tell us about the intervention areas and the development lines of Eridania Sadam that just turned 110 years of activity.

PARAMOUNT FARMS (page 78). Bringing innovation and added value to the pistachio nut market: this is the challenge that Paramount Farms decided to face also in Italy with its Wonderful® Pistachios brand. We speak about it with Wim Petermans, European sales retail director of the company.

RADEBERGER GRUPPE ITALIA (page 40). With the famous Dab Cruda and other brands going to assert their peculiarities, Radeberger is among the protagonists of the positive trend of the quality beer market: we speak about it with Rolando Bossi, general executive manager of the company Italian branch.

RVA RASINI VIGANÒ (page 58). The risk management is a more and more important delicate and complex area, for enterprises' business. Romina Colciago, Risk Consulting RVA Rasini Viganò SpA Director, helps us in understanding some characteristics and objectives.

VALUE LAB (page 100). The consultancy to the companies must compete with more and more complex needs. Value Lab has always aimed at joining the "classic" tools to a strong IT support, as explained by Marco Santambrogio, Managing Director of the company.

FOCUS

AGOR (page 59). MDD Expo and DPH Expo, present in all the national and international agendas of the buyers of the big distribution, the wholesalers and the HO.RE.CA, are the two exhibitions of food and non-food private labels, visited every year by 7.000 visitors seeking new products for their markets.

BOLOGNA FIERE (page 50). MARCAByBolognaFiere has always offered to operators a good program of conventions and workshops. Also the next edition of the event (Bologna, 20 and 21 January 2010) puts the "comparison" in the center of the initiative, with four appointments of significant interest for the operators.

BOSCHI FOOD & BEVERAGE (page 49). Boschi Food & Beverage - Italian co-packer leader in the manufacturing of products made up of tomatoes, fruit juices,

ment of both the market and the Internet, whose success does not affect the other channels.

CUSTOMERS' LOYALTY
The collection of shopping points is not enough page 68
 Are consumers still sensitive to prizes, either in the form of goods or discounts on the purchases? The answer is articulated and shows a customer who makes a personal use of loyalty.

SAFETY
Titanium mozzarella page 71
 The NAS (Anti-Sophistication Nucleus) keep seizing and finding out more and more dangerous substances used to counterfeit foods. A danger for both health and made in Italy.

Consumers in brief page 73

COMMUNICATION

INTERNET
Immediate contacts page 76
 The instant messaging is a tool increasingly available on the Internet. It is the emerging of a new type of sociality explored by a survey.

Communication in brief page 79

PACKAGING

MATERIALS
The best devices to preserve food at home page 86
 Rolls, bags, trays: solutions to keep foods in the fridge for a long time. The aluminum still offers the most practical and hygienic modalities.

MATERIALS
Certified origin paper page 88
 The transformation industry plays its role to avoid the indiscriminate destruction of forests. And, waiting for a communitarian norm, in Italy it widely appeals to the voluntary work.

Packaging in brief page 89

soups and sauces, tea and drinks - confirmed also in 2009 to be the protagonist of quality and innovation.

EUREKA HOST (page 65). On the occasion of Host, the international Exhibition of the professional hospitality held from 23 to 27 October 2009 at Milan Fair, Smartfreeze hosted a talk show dedicated to: "The management of the cold supply chain in the HO.RE.CA: new technologies and power saving".

LA FILOMETALLICA (page 33). Filometallica, historical company located in Milan, reference point for the lighting industry, has commercialized for a long time high efficiency and low consumption lamps and among these LED reflectors by MEGAMAN®.

NOVITÀ HOLDING (page 43). The Group is one of the most active realities in the food sector. Two companies, each one with its own specializations are under Novità Holding: Vinfood SpA in the production of ready-to-eat gastronomy and very fresh pasta and Ortofrost SpA, in the working and trading of frozen vegetable soups.

SPOTS

BBS (page 113). Casallegra, the BBS brand for house cleaning, enriches with the famous pussy Hello Kitty for a product line that makes housework funny, fashionable and light.

FERPLAST (page 112). The company, leader in the pet care market, chose JP Edwards to support its increase, through the integration of different business processes. The objective is mainly to centralize the management control and better integrate the trade branches and the production plants..

LOGISTICS

TECHNOLOGIES
Innovation in the refrigerator case page 91
 An invention that changed the alimentary style and goes towards a sustainable future. In the meantime manufacturers are more and more producing tailored solutions.

Logistics in brief page 95

HUMAN RESOURCES

DISTRIBUTION
The careers at do-it-yourself chains page 96
 Ad hoc training programs, from sales to the highest managerial levels. Each do-it-yourself chain has got its system, but professionalism is the common element.

PROFESSIONS
Ready to evaluate the real estate page 99
 The market evolution pushes to the hunting of qualified professionals to estimate the assets suitable for investing. In Italy it is not a defined type of professionalism.

Human resources in brief page 101

FINANCE

COMPETITIVE SCENARIO
Comparing the sheets page 103
 The crisis hits the home textile also affecting the sector leaders. There are recovery perspectives, but not at the levels preceding the decrease.

Finance in brief page 107

ENVIRONMENT

SAFETY
More healthy at the checkout counter page 109
 The work organization is the origin of professional disturbances and accidents. The prevention shall be made in the planning phase of the sales points and the staff training.

RECYCLE

The final balance of the packaging recovery page 111
 The use of less packaging introduced in the consumer goods influences the collection data. However Rilegno files a positive period that carried to an extension of activity.

Environment in brief page 112

ENERGY

TOURISM
On the way to plant stations page 114
 Routes created to visit the power plants are born. Their insertion in the landscape is sometimes aimed at exploiting the territory.

INDEX & MONITORING

Raw materials..... page 116
 The month of October brings uneven variations both for food and non food world.

Prices and consumption..... page 118
 Data coming from "Indicatore di consumo Confcommercio (Icc)" in September 2009 highlight a still uncertain situation as to resumption.

Consumers confidence page 120
 The confidence degree of Italians decreases. Data collected by the Findomestic Monthly Observatory that records in October 4.72% compared to 4.82% of the previous month.

Durables page 122
 The Italian market of technical consumer goods recorded a quantity of sales equal to 4,415 million Euros, second three month period 2009, -8.8% compared to the same period 2008.

INFORMATION & COMMUNICATION TECHNOLOGY

Logistics solutions page 124
 Here are the cases of: Zuffellato Computers, Honeywell, French Connection, Hupac, Checkpoint Systems, Brain Force, Geodis Züst Ambrosetti, Italy Solo, Vollect Voice.

Reading paths page 127
 Information for readers and advertisers.. page 128

FRES.CO (page 63). Vogliazzi, a brand by Fres.co Group, leader in the fresh ready meals, widens its offer of first courses. Starting from January 2010 two new references are being launched in the family format: ragu lasagne and Roman potato dumplings.

LEUCI (page 31). Born in 1919 in Lecco under the name "File" - turned in the thirties into the present company that takes on again the ancient name of the lake town - Leuci is an historical company in the lighting field.

MAGAZZINI DEL CAFFÈ (page 51). Designed for family and singles' target, also winking at foreign markets, the coffee pot Miss Moka Evolution, always produced in Italy, uses Café Bahia pods, produced by Magazzini del Caffè spa.

PROCTER&GAMBLE (page 73). Dash Smacchiatore is the new washing additives line destined to wash machines and pretreatment of clothing items, created to assure an effective removal of even the most persistent stains, starting from the first washing.

STAR (page 81). Brodi Star is an innovative product indeed, in a market that as to size and importance is equal only to the fresh and UHT milk one: taste and practicality ready in one brick, for a quality broth.

TRUDY (page 41). The company chose Oracle to govern its own regular expansion process, through the introduction of an integrated management system capable of optimizing the management of all the business processes.

VITAVIGOR (page 48). An appetizing, light, fat free, crispy and tasteful snack, to be used with soft sauces and cheeses, mousses and also sweet or bitter jams: it is HappyVi, the new mini-snack line produced by Vitavigor.