

The Alliances of European Retailers and Their Effects in the Field of Marketing and Supply Chain

Carmen Bălan

While in Romania retailing is in the growth stage, in the mature market economies of Europe, it is facing fewer development opportunities within the countries of origin. Fierce competition, more demanding customers, higher expectations, increasing pressure on prices are the common shades of the retailing landscape of these countries. Consequently, retailers have focused on the concentration and internationalization of their activities, supply chain efficiency and effectiveness, marketing strategies, prices and alliances. Among the strategies devised by the major retail players of Europe range the international alliances in the supply chain, under the form of buying groups. The paper aims to bring to light some of the major buying groups existing in Europe and to analyze their role and effects in the field of marketing and supply chain.

Key words: *retailing, alliances, European Union*

JEL classification: *D 74, F18, F23, M20*

Buying groups

Buying groups are a major type of international retail alliances. In essence, a buying group is an organization created by several retailers with the aim of improving their purchasing power in front of the manufacturers and distributors as well as enhancing their market competitiveness compared to other types of retail players. Some experts

such as the IGD specialists challenge the frequently used terms “buying group” and consider that “negotiation group” or “roof organization” are more relevant terms.

The buying groups are in fact buying alliances that are a shield used especially by independent retailers to consolidate their position on the market in front of the aggressive marketing and distribution strategies of the large manufacturers, distributors and retailers.

From the perspective of marketing management experts, the integration of the efforts of retailers is an example of vertical marketing system (VMS) and more precisely an example of contractual system. In essence, a VMS consists of various types of marketing channel players that join their forces in order to achieve common objectives by acting as a unified system.

In general, a contractual VMS includes different independent firms from various levels of the marketing channels that collaborate on contractual basis in order to obtain more economies of scale or sales impact than they could achieve each one separately. (Kotler, Ph., Keller, K. L., 2007, p. 251). Thus, the buying alliances of retailers are relevant examples of contractual vertical marketing systems. In fact, such an alliance generates a higher value for members than what they are able to obtain negotiating with their suppliers and selling to their customers relying only on their own efforts and resources. The buying alliances are value adding partnerships.

The economic literature has approached since the 1990s the issue of strategic alliances. In essence, a strategic alliance refers to the functioning of two or more organizations in close connection based on a perception of a single interest shared by the parties. Some experts have called the strategic alliances “a fad of the 1990s” (Doorley, T.L., 1997, pp. 1, 9). While at present experts and practitioners use widely the term alliance, in the 1970s, business partnerships have been considered unnatural and inferior forms of governance in Western business.

Alliances are based on the genuine commitment of each party. Commitment means much more than having an ongoing cordial relationship. (Anderson, E., Weitz, B., 1992, pp. 18-34). It is related to the following key aspects: long time horizon, sense of loyalty to the other parties, willingness to grow and invest in the relationship.

Objectives, generating factors and impact

Buying groups are created by their members in order to accomplish a set of clear objectives. Among the main objectives of a buying group range the following:

- to obtain better acquisition prices based on the enhanced negotiation power generated by the combined purchasing power of the members;
- to get trading benefits such as special rebates or promotional support;
- to distribute international private brands of the retail members;
- to exchange information and know-how among members, in order to promote best practices, as long as they are not competitors;
- to create partnerships for the expansion in new markets in Central and Eastern Europe.

The objectives are primarily defensive, respectively to enhance the price competitiveness in the retail environment through the consolidation of the purchasing power of the members. At the same time, the buying alliances may have proactive objectives, such as the promotion of own national or international brands, the expansion on new attractive markets.

The factors that led to the creation of the buying groups relate both to manufacturing and distribution/retailing. The major generating factors are the following:

- a. increased power of manufacturers. One of the major trends in manufacturing and retailing is the ever greater concentration. For instance, in France, the first eight global industrial groups in the agro-food sector have a market capitalization higher than Carrefour that is the second global retailer and the first European retailer. The degree of concentration is very high in the key manufacturing fields. For example, in France, Kraft represents 44.7% of coffee sales; Procter & Gamble 32.2% of detergents; Nestlé 32.3% of chocolate drinks; Kellogg's 43.2% of cereals; Masterfoods 35.7% of pet food (Salto, L., 2007, II-102). On the French market, the total number of large groups is 260. They represent 3% of the number of suppliers, 56% of the product references and 60% of the turnover of the food retail stores. Most of them are multinationals (95%) and foreign (70%). From another perspective, the buying alliances are of benefit not only to retailers in order to face the manufacturing giants, but also to manufacturers with a view to increasing their turnover and improve the use of their processing capacities. The alliances provide manufacturers significant opportunities for the production of the retailers' private brands. The actual advantage consists in the pan-European reach of the alliances, in the significant market potential that may be tapped by manufacturers even under the brand names owned by the alliances.
- b. challenges issued by discounters and hard discounters. Lately, discounters and hard discounters have expanded aggressively their presence in the European landscape. They represent a powerful threat for the other types of retail formats, even for hypermarkets and supermarkets. Significant examples are the discounters Aldi and Lidl that hold a combined share of 40% of the German market (Lucht, D., 2007). These retailers have implemented continent-wide in-

ternationalization plans. In Western Europe, they boldly compete with hypermarkets and supermarkets. The pillars of the rapid expansion of discounters and hard-discounters are the following: low retail prices; good to high quality food products, low operation costs; efficient management. The business model promoted by discounters is so successful that leaders of hypermarket and supermarket formats have to rethink their own models and identify ways to enhance their competitiveness such as: diversification of their own portfolios of retail formats, cost reduction programs, improved supply chain strategies, emphasis on the non-food sector, initiation and development of their online presence etc.

The main retail alliances in Europe and their situation are presented hereinafter. Their sales value is also listed.

According to the evaluations made public by EMD, the leading retail alliance in Europe, the top 15 retailers and retail alliances in Western and Central Europe have a combined share of 77% of the sales value. The list of players and their sales figures are presented below:

Table 1 – Top 15 retail players of Europe in 2002 (based on EMD estimates)

Crt. no.	Retailer/Retail alliance	Sales value (million Euros)	Share of the retail sales in Europe (%)
1	EMD	119,439	11.5
2	Coopernic	96,939	9.3
3	Carrefour Europe	78,785	7.6
4	Agenor / Alidis	76,310	7.3
5	AMS	69,511	6.7

6	Metro Group	66,651	6.4
7	Tesco Group	55,927	5.4
8	Schwarz Group	40,598	3.9
9	Aldi	40,448	3.9
10	Auchan Europe	36,903	3.6
11	Ahold Europe	27,385	2.6
12	Casino	26,030	2.5
13	Sainsbury	25,329	2.4
14	Asda (Wal-Mart UK)	23,961	2.3
15	Morrisons UK	19,402	1.9
Total Top 15		803,618	77.4
Total Europe (Western & Central)		1,038,527	100

Source: *EMD at a glance*, <http://www.emd-ag.com/e/untern001.shtm>, download date: 4 September, 2007.

According to the IGD experts, in the fiscal year 2004/2005, in Europe, the top 10 retailers and buying alliances have been the following:

Table 2 – Top 10 retail players of Europe in 2004/2005 (based on IGD estimates)

Crt. no.	Retailer/Retail alliance	Sales value (billion Euros)
1	EMD	119.0
2	Coopernic	88.5
3	Carrefour	72.6

4	Alidis	70.4
5	AMS	69.6
6	IRTS	56.4
7	Metro	53.1
8	Tesco	49.2
9	Aldi	35.9
10	Lidl & Schwarz	32.5

Source: *Five major European retailers found Coopernic alliance*, 02/05/2006, <http://www.igd.com/CIR.asp?menuid=50&cirid=1930>, download date: 9 March 2007.

The list is dominated by two retail alliances: EMD and Coopernic that have reached together a sales value of 207.5 billion Euros in 2004/2005. Consequently, they are twice more powerful than Carrefour, the second global retailer ranked after Wal-Mart Stores Inc. - the leading retailer worldwide - that has achieved retail sales of 312.4 billion USD in 2005. Other top retail alliances are Alidis and IRTS.

The retail alliances have a strong impact in the field of marketing and supply chain. On one side, the marketing impact refers to the coordination of the product, price, distribution and promotion strategies of the members. On the other side, the supply chain impact relates primarily to the harmonization of the buying strategies of the members, in order to obtain better prices from suppliers.

At the same time, the alliances have a direct impact on the competitive balance within the market, at European level. They enhance the competitiveness and the negotiation power of the independent retailers in front of the powerful integrated groups. Simultaneously, they provide smaller manufacturers access to a larger market and opportunities for the production of private brands that will be distributed by the alliance members at European level.

EMD

The acronym EMD stands for European Marketing and Distribution. EMD is a partner for the most prominent manufacturers. This fact is proven by the following data: 50 multinational manufacturers cover 60% of the procurement volume of EMD and the top 100 European manufacturers represent 75% of the purchasing volume.

The array of services provided to the members is relatively large. It includes: sales promotion drives, euro-promotions, product launches and brand repositioning, sales and quantity guarantees. At the same time, EMD aims at setting up strategic partnerships among members in order to support the joint development of their presence in the high-potential markets of Central and Eastern Europe.

Table 3 – EMD members in 2002

Country	EMD member	Market volume (Euro)	Turn-over (Euro)	Market share (%)	Surface (sq.m.)
Austria	ZEV Markant	20,000	2,641	13.2	778,727
Belgium/ Luxembourg	Delhaize Le Lion	22,983	3,900	17.0	621,000
Greece	Delhaize / Alfa Beta	10,500	908	8.6	156,000
Romania	Delhaize / Mega Image	15,574	83	0.5	15,000
Czech Republic	Markant Cesko	16,397	1,407	9.1	300,000
Germany	Markant	213,942	39,500	18.5	13,342,000

Denmark	SuperGros	18,268	5,663	31.0	1,000,000
Spain	Euromadi	59,965	10,735	17.9	5,797,704
France	Système U	207,956	15,141	7.3	1,607,015
Finland	Tuko Logistics	11,404	1,631	14.3	500,000
Great Britain	Musgrave/Budgens/Londis	193,967	3,196	1.6	526,000
Italy	ESD Italia	86,400	13,738	15.9	2,291,841
Ireland	Musgrave	14,923	2,600	17.4	350,000
Norway	Unil / Norges-Gruppen	18,218	7,110	39.0	1,000,000
Netherlands	Superunie	26,665	8,060	31.0	1,500,000
Sweden	Axfood	21,285	3,006	14.1	400,000
Slovakia	Markant Slovensko	5,590	120	2.1	25,000
Total		964,037	119,439	12.4	30.8 Mio

Source: *European Trade, EMD Members*, <http://www.emd-ag.com/e/report002.shtm>, download date: 4 September, 2007.

On January 1, 2007, EMD had thirteen full members. The group is present in twenty two markets, more precisely in all the Western European markets and in countries of Central and Eastern Europe, including Romania. The countries covered by EMD are the following: Austria, France, Belgium, Netherlands, Czech Republic, Slovakia, Germany, Denmark, Spain, Finland, Greece, Great Britain, Italy, Ireland, Sweden, Norway, Portugal, Romania, Poland, Bulgaria, Croatia and Hungary. It is the number one purchasing and marketing organization in Europe.

In 2007, according to the EMD estimates, the buying alliance had a sales potential of Euro 123.4 billion and a market share of 12.9%. The

profile of the EMD members is diversified. The buying alliances include from international food retailing groups to national or regional supermarket chains. Delhaize and Markant range among the international groups that are EMD members.

Delhaize Group (a food retailer headquartered in Belgium and listed on Euronext Brussels) has become a member of EMD in 2001 (Delhaize Group, March 12, 2001). The membership referred only to the European activities of Delhaize Group: Delhaize Belgium, Alfa-Beta (Greece), Delvita (Czech Republic and Slovakia) and Mega-Image (Romania), without the operations of US and Asia. At the beginning of the decade, when it joined EMD, Delhaize Group has operated in 10 countries, achieved sales of Euro 18.2 billion in 2000 and its net profit amounted to Euro 169.9 million in 1999, results generated by a sales network of 2,360 stores and 153,000 employed associates.

NorgesGruppen ASA is one of the most recent entries in the list of members. (EMD-AG Press Release, 8th January 2007). It holds a leading position in the market of origin, fact reflected by a market share of 36.7% of the Norwegian food retail sector.

Coopernic

The denomination Coopernic is in fact the acronym corresponding to the following set of terms: Coopérative Européenne de Référence-ment et de Négoce des Indépendants Commerçants. This buying group is the most recent on the European landscape. It has been created as a joint venture between Leclerc and Conad in December 2005. It was officially launched in Brussels in February 2006 with three additional members. At present, the members of Coopernic are the following: E. Leclerc (France), Conad (Italy), Co-op Schweiz (Switzerland), Colruyt (Belgium) and Rewe Group (Germany).

The founders of the alliances have stated that future admission of new members is possible. However, in their opinion, the optimal size is six

members, in order to maintain control and reduce management complexity.

Four of the five members are co-operatives. In essence, a retail co-operative is a vertical marketing system created by small independent retailers that join their forces mainly to obtain better commercial terms from their suppliers.

Table 4 – The EMD members and their market situation

	Colruyt	Conad	Coop Schweiz	E Leclerc	Rewe
Ranking in home market	3rd	2nd	2nd	2nd	2nd
Value share in home market (%)	18.6	12.2	15.7	17.5	16.1
Total turnover in 2005 (bn Euro)	4.4	8.5	9.6	30.1	40.8

Source: *European Buying Groups – A Threat or An Opportunity?*, 25 August 2006, <http://www.igd.com/CIR.asp?menuid=50&cirid=2031>, download date: 9 March 2007.

Coopernic is the second major retail player after EMD. The alliance has reached an aggregated turnover of 95 billion Euros. According to its own estimates, the second largest European grocery buying group has a 10% share of the all European grocery trading. Compared to it, the leading three integrated retailers – Carrefour, Tesco, Metro – have a 20% share.

The members intend to bypass the intermediaries and reduce the logistic costs, with a view to providing customers with attractive products at a price advantage. The main objective of Coopernic has a defensive character. The buying group has been set up as a response to the growing power of the multinational grocery suppliers. This fact is confirmed by the press release that has announced the creation of Co-

opernic on 16 February 2006, according to which, on large market segments, 3-4 international firms provide 80% of the products sold in hypermarkets (Coopernic, Communiqué de presse, 16 février 2006).

However, from a supplier perspective, most of the major members of the group have already had favorable buying terms in their individual contracts. Thus, Coopernic becomes a significant challenge for the supplier due to the aggregated negotiation power.

The organization is owned in equal shares by its members. However, the members differ in terms of size and geographical coverage. For instance, Rewe represents 40% of the aggregate turnover and has a wide presence in Europe. Specialists consider that the large branded suppliers of Rewe have little gain in coverage from the other members of Coopernic.

Table 5 – The geographical presence of the EMD members

Region	Country	Colruyt	Conad	Coop Schweiz	Leclerc	Rewe
Western Europe	Belgium	615 SE,SM				
	France	44 SM,WS			502 HM,SM	FS
	Germany					7,401 HD,HM,SM,WS
	Portugal				12 HM	
	Italy		2,944 HM,SE,SM		22 HM	345 HD,HM,SM
	Spain				7 HM	
	Switzer-			1,433		

	land			SE,SM		
Central Europe	Austria					1,853 SM
	Croatia					16 SM
	Czech Rep					224 HD
	Hungary					142 SM
	Slovakia					65 SM
	Slovenia				1 HM	
Eastern Europe	Bulgaria					1 SM
	Poland				16 HM	36 SM,WS
	Romania					26 SM,WS
	Ukraine					8 SM

Note: Shading indicates retailer presence. FS: Foodservice, HD: Hard Discount, SE: Superette, SM: Supermarket, WS: Wholesale

Source: Coopernic, Communiqué de presse, 16 février 2006.

Total membership of Coopernic is 7,495 independent businesses, with 17,208 retail outlets across 17 countries from Western, Central and Eastern Europe. The number of members fluctuates constantly as small retailers enter and leave each of the four co-operatives. The range of store formats is large and includes hypermarkets, supermarkets, wholesale depots, discount stores and superettes.

The members of Coopernic aim to fulfill the following main common objectives:

- a. to optimize the buying of the top brands;
- b. to organize market tests;
- c. to coordinate new product launches and retail procedures;
- d. to provide regional manufacturers the access to the retail displays of the members;
- e. to reduce logistic costs.

Compared to the buying centers of the integrated groups, each member of COOPERNIC maintains his full buying autonomy. The alliance allows members to increase their national offer with selections of best products from the portfolios of the other members.

Inside the alliances, the co-founders may delegate logistics operations to one of the members that is considered the best performer. For example, from France, E. Leclerc provides fuel to the first service stations of CONAD in the North of Italy.

In order to share costs and generate substantial expense reductions, the members have decided to: elaborate common procedures for the private brands and the first-price products; ensure the free access to a common data base of supplier audits (to control the social and ethical aspects of the manufacturing conditions on the international markets).

The creation of COOPERNIC has led to the dissolution of the Lucie alliance. In 1997, Leclerc and Système U have created Lucie alliance. When Coopernic was established, Système U has announced it would join EMD, the leading retail alliance in Europe. At the same time, a former potential project of three French cooperative retailers - Inter-marché, E. Leclerc and Système U – will not materialize at least for the moment.

Alidis

The Alidis alliance has been formed on 24 September 2002. It is a strategic alliances that has been created to fulfill not only the primary goal of negotiating price advantages but also other joint objectives

relative to new product launch, first price product range, common brands, loyalty programs etc.

At present, the members are Les Mousquetaires (Intermarché), the second largest group in France, Eroski Group, one of the leading food distributors in Spain and Edeka Group, the first food distributor in Germany. Edeka Group has joined the alliance in 2005.

The three independent groups have an aggregated turnover of 75 billion Euros (Alidis Communiqué de presse, 28 avril 2005) and 17,000 stores. Their aim is to provide a better quality/price ratio to the consumers by joint purchasing strategies and an exchange of know-how.

The group has a significant presence in Europe. The members cover a market of 10 countries: Belgium, Bosnia-Herzegovina, Denmark, France, Germany, Poland, Portugal, Romania, Serbia and Spain (Alidis, Dossier de Presse, 24 octobre 2006).

The group Les Mousquetaires is a major distribution player in Europe. It holds the third rank in the distribution on the French market and the fifth rank in Europe. In 2004, the group has reached a turnover of 38 billion Euros. The group has 4,000 stores on the continent and 112,000 collaborators. The market presence includes Portugal, Spain, Belgium, Poland and other countries from Central and Eastern Europe. The main trade names are Intermarché, Ecomarché, Netto, Bricomarché, Logimarché, Vêtimarché, Roady, Restaumarché and Espace Temps. The group positioning is focused on the best quality/price ratio.

The Eroski Group has approximately four decades of existence. The group has witnessed an important development in the present decade. For example, in 2004, the profit has reached 129 million Euros, due to a 20% increase compared to 2003. A number of 122 new stores have been opened in 2003. In Spain, Eroski Group has 1,700 stores and 30,000 employees. The main trade names are Eroski hypermarkets, Eroski supermarkets, Eroski/city, ALIPROX self-service, Viajes Eroski, Parfumeries IF, Forum stores for sport products.

Edeka had a turnover of 31.57 billion Euros in 2004, 8,500 stores and 220,000 collaborators. The group holds the leading position on the German food retail market.

The buying policy of Alidis is implemented by the buying central Agenor set up in 1998. The alliance aims at diminishing the costs all along the supply chain. It provides suppliers many services such as: (i) access to European statistics consolidated by country and by product; (ii) design and implementation of euro-promotions; (iii) support provided to suppliers at pan-European scale for a specific product category; (iv) support for the launch of new products on a specific market.

Since 2005, after Edeka Group has become a member of Alidis, the alliance has focused on several priorities: (i) “massification” of purchases, in order to mitigate the over-dependence on the large and powerful suppliers; (ii) best practice sharing among the three members; (iii) design of a common range of European products; (iv) common purchases of fruits and vegetables; (v) quality auditing of the suppliers; (vi) joint IT practices; (vii) Web site for consumers and industrial partners.

A potential strategy for the future

In Romania, retailing is one of the most dynamic sectors. Since 1990s, consumers have witnessed tremendous changes in the diversity and quality of product supply and in the store formats.

The arrival of major international players on the Romanian market has visibly increased competition. According to GFK, one of the most prominent market research companies that are present in Romania, the structure of the retail sales is market by the continuous increase in the share held by the modern retail formats.

Table 6 – Retail sales structure in Romania, in 2004 and 2006

Retail format	Share in the retail sales (%)
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	Year 2004	Year 2006
Hypermarkets	1	8
Supermarkets	11	16
Cash & carry	6	6
Discount stores	1	4
Small shops	56	52
Stalls and open market	8	4
Other formats	17	10
Total	100	100

Source: Vlad, A., 27 August 2007.

Between 2004 and 2006, the share of the modern retail formats has increased from 19% to 34%. At company level, significant increases have been achieved in 2006 compared to 2005 by Metro Group (21%), Rewe Group (34%) and Carrefour (39%). This trend has a major impact on trade practices and on the balance of power within the marketing channels.

On one side, the small independent retailers loose ground in front of the international retail groups. Their sales decrease as consumers favor the array of goods and brands of the hypermarkets, supermarkets and discount stores recently established on the Romanian market.

On the other side, the manufacturers see their negotiating power diminishing each day in front of the very powerful buyers of the modern formats. The financial effort required to be present in the portfolio of a hypermarket, supermarket and discount store act like a “natural selection” force among the manufacturers. Only those that are able to comply with the requests of the big players will have access to the market, to an increasing flow of customers.

At present, a producer of soft drinks that wants to be present on the shelves of a hypermarket network has to pay in the first year, for the

introduction of two products, almost Euro 200,000 (Vlad, A., 27 August 2007).

The first entry of a manufacturer in a modern store costs Euro 10,000. Besides the entry fee, the manufacturer must pay Euro 2,000 for each type of product from its portfolio. Four to five times yearly, the manufacturer must participate in the promotion based on catalog, organized by the retailer. The corresponding fee is Euro 700 for each appearance.

These figures demonstrate the ever increasing power of the major retail players on the expense of both smaller retailers and manufacturers. Consequently, as the trend will become stronger, the small retailers and manufacturers will be interested to identify methods and strategies to enhance their competitiveness. The alliances will very likely be formed in order to meet the pricing challenge issued by the international retailers.

For the moment, in Romania, few alliances have been established. At the same time, those created do not have a very strong power.

In the future, face with the accession of the modern retail formats, the smaller players on the Romanian market will look for economies of scale and consolidated buying to be able to compete with the low price policies of the retail leaders. This trend will become more visible as Romanian market will enter the late growth and maturity stages.

Retail cooperatives, voluntary chains and other types of strategic alliances represent a future potential strategic choice of those companies that want to manage profitably their competitiveness.

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Carmen BĂLAN, Professor, PhD., Department of Marketing, Academy of Economic Studies, Bucharest, Romania.