

Jubilee Edition

EBIA

european bedding industries' association

NewsMagazine



Thank you for your continuous support and co-operation

tion and desirable token for various scientists, researchers and institutions, and a real challenge to turn their often theoretical work into real and practical benefits for every single citizen.

We set up a European statistics database, we elaborated a number of position papers, developed a comprehensive PR-campaign and issued a Sales manual to help our members in educating the European Bedding Salesman.

We have built solid relationships with the European Commission in Brussels, DG Enterprise and DG Trade, and set up close co-operations with other Associations in the field of consumer safety, product quality, mattress renewal and recycling.

By doing so, we tried to make a modest contribution to an overall improved product and service offering and therefore to the well-being of the European Bedding consumer.

We established good relations with the Press, both European and national and made ourselves heard at both trade and consumer fora. Various press kits, comprising abstracts of new findings and research by some of the world's most renowned sleep experts, are now readily available. Our Newsletter and annual News Magazine provide actual information from the sector to our

just some of the things EBIA has managed to do.

So, we can be very proud of what we have achieved in our first decade. And of course, this would not have been possible without the effort and commitment of a lot of people, members of the Board, the Marketing and Technical Committees, the National Federations and their presidents, members and associate members, and last but not least the professional and dedicated Management team. All of these people have asked themselves what they could do for EBIA, rather than what EBIA could do for them.

To all of them and at the occasion of our 10th Anniversary I want to solemnly say: Thank you very much for your vision, your commitment, your continuous support and time spent in the interest of a whole industry.

Sure, we still have a lot of work to do. We are not afraid of falling short of challenging projects. But with your help, we are more than ever motivated and will continue to do whatever is necessary for our great Bedding Business, and to ensure that everybody in our markets can enjoy the good night's rest that he or she deserves.

Frank Verschuere

For the past 10 years the European Bedding Industries' Association has worked very hard in order to increase consumer awareness about the importance of a good night's sleep and to provide the consumers and other stakeholders with correct, relevant and useful information.

Against a background of a rising number of people affected by a lack of sleep and suffering from various sleeping disorders, we have tried to convince them that a good bedding system - next to a host of other factors - is a necessary prerequisite to a healthy sleep.

We organised and financed several Market Research studies to better understand the needs, perceptions and expectations of our customers. We encouraged researchers all over the world to find root causes of sleeping disorders and to improve the insights of our industry.

The EBIA Award has become, in a very

Autumn Forum of the



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The beautiful city of Seville in south Spain was by all means an appropriate location for EBIA's 9th General Assembly – the traditional annual meeting of European bedding producers and industry suppliers. A large number of participants and guests were provided with the opportunity to not only obtain actual information on recent developments, expectations and trends regarding our sector, but also to enjoy some relaxing moments in the majestic setting of the charming Andalusian metropolis, under a blue sky and with radiant sunshine.

The centrally located Meliá Sevilla hotel, with its excellent meeting facilities, comfortable rooms and good local food was a much appreciated venue and also a perfect spot to explore this unique city and its countless attractions.

In his opening address, EBIA President Frank Verschuere extended a warm welcome to the many participants and international guests, underpinning the fact that the large attendance is undoubtedly yet another token of growing understanding and cohesion within the European bedding industry. The emerging unity is a crucial stepping stone for building a solid basis to successfully confront the multiple challenges which, according to the various economic indicators, all segments of the EU industry will be facing in the coming year. We have to work together to facilitate our industry's efforts for paving a promising road towards stability and future prosperity – in spite of the difficult times that may lie ahead. Vision, stamina, creativity and sound entrepreneurship are more than ever a sine qua non and several of EBIA's recent initiatives fit well in this general framework of support for our members at all relevant levels. All available tools must be put to work in order to ensure that a good bedding system is perceived as an all-important household item and continues its vertical progress up the ladder of consumers' priorities.

In presenting the association's annual report, Secretary General Endre Varga focused on a summary of EBIA's activities since the Dubrovnik meeting – PR and communication actions, business and technical topics of particular interest, strengthening the co-operation with related European federations, the improving relationship with services of the European Commission in Brussels, the 4th edition of the annual Supplier Council, the daily work of the secretariat and a number of issues of general interest. He presented a detailed overview of EBIA's statistics for the year 2007, gave an extensive account about the organization's finances and commented a compilation of the latest EU market forecast.



European Bedding Industry in Seville

Combined guest speaker sessions

EBIA was pleased to be able to contact a select group of prominent international guest speakers, who gave lectures on actual marketing and technical topics, as well as the latest consumer and market trends:

- 'Strategies of the Serengeti' by Stephen Berry
- 'Sleep Research Findings' by Dr Eduard Estivill
- 'International Trade & Trade Defence - Recent Developments' by Piet Chalmet
- 'New Market Trends' by Herman Konings

Representatives of EBIA's associated member SABA (international supplier of adhesives for the mattress industry) gave an interesting and well-received presentation on their company's activities, innovations and future vision.

Attribution of the EBIA Award during the Gala Dinner



The exceptional 16th century residence, Casa Salinas, located in the monumental area of the historic quarter of Seville was the chosen venue for the traditional gala dinner attended by the large gathering.

The accompanying background music, a mixture of Spanish classics and occasional Flamenco, was provided by two top-notch local guitarists, much fancied by all music-loving invitees.

The evening was also the occasion for the attribution of the EBIA Award – this time to Dr. Eduard Estivill from Spain, a renowned sleep specialist and director of the Estivill Sleep Clinic in Barcelona. The award jury particularly praised the recipient's successful long time efforts to raise awareness on the importance of improving sleep habits among EU citizens and underscoring the many advantages of state of the art bedding systems in the process.



Excursions

On the last day of the annual event, the companions enjoyed a morning carriage tour of the famous Triana quarter on the opposite bank of the Guadalquivir river – with its hidden corners, picturesque streets and a rich history of bullfighters. In the afternoon, the guests were invited to a memorable walking tour of the famous Santa Cruz quarter in the heart of the city, around the monumental cathedral and the Giralda tower. The sightseeing culminated in the guided visit of the Reales Alcazares.

The End & Press Conference

In his closing remarks, Mr. Verschuere expressed his satisfaction on the course of EBIA's 9th General Assembly, especially with regard to large attendance, content and the organization of both the meetings and social events. He thanked all present for their time and motivation to once again take part in the traditional annual come-together of the main players in the EU bedding industry and underlined his appreciation for the continuous support from the side of EBIA's member associations. It should be understood in this context that EBIA can only be fully efficient if there is a permanent flow of information from the members on their needs and if regular consultations concerning this take place. This synergy is crucial.

A press conference with journalists from the EU was held at the end of the event, in which EBIA's management team had the opportunity to shed additional light on recent developments in our sector and underpin the growing need to fully valorise the inherent advantages of quality bedding in our daily life, and its positive influence in various areas of public life – insomnia, stress, productivity, absenteeism from work, lesser medication, safer traffic circumstances, ...

Back to the roots! The participants were informed that EBIA's 10th Jubilee General Assembly (how time flies!) will take place early October 2009 in Brussels, the capital of Europe, where the association was founded at the turn of the century. EBIA's team will do all it can to make this a truly memorable occasion for all colleagues and friends!



End-of-Life Mattresses

The French bedding federation has informed EBIA that the issue of mattress recycling and inherent costs has again surfaced on the local market and that the national authorities are already working on a related project of law which, according to recent information on the subject, should be implemented at the beginning of 2011.

According to CBM in The Netherlands the end-of-life issue is again becoming actual on the Dutch market as well, hence EBIA remains vigilant as to possible implications at EU level and any supportive steps that the association could take in this respect.

Eco-label

New criteria for textiles and bed mattresses have recently been agreed by the European Commission. Discussions at stakeholder level proved difficult and the EC had to extend the validity of existing environmental criteria at several occasions.

According to a regulatory committee of member state representatives, textiles and bed mattresses containing additive flame retardants such as deca-BDE should not be awarded the European flower eco-label. The committee also said textiles containing biocides that could potentially be carcinogenic, mutagenic or reprotoxic, as well as bio-accumulative & persistent should not be awarded the label. But, such substances would be allowed in mattresses.

Green group EEB and consumer association Beuc generally welcomed the decision on the ban of additive flame retardants for textiles and mattresses.

Though the eco-label remains a voluntary scheme and is at present by no means obligatory, members of EBIA's TC committee had a substantial say in the decision process surrounding the establishment of the new criteria and several of their proposals were duly taken into account in the final draft.

The revised criteria are to be published in the EU's official journal.

EBIA Award

As has been the case on the past two occasions, EBIA's Board has selected the two finalists for the 2009 Award from a list of nominees forwarded to the secretariat by member national associations. The aim of the Award is to honour a person, organization or institution who/which during the past year has given a substantive contribution to the sound progress of the European Bedding Industry.

The voting procedure was finalized on 15th August and the secretariat wishes to thank all EBIA members who took part in the voting and have returned their ballots in time to allow for a smooth course of the relevant procedure.

Statistics

Though the reporting is slowly but gradually improving, we take this opportunity to once again reiterate our request to all affiliated national federations to send their figures as fast as possible in order to shorten the processing time span and consequently enable all concerned parties to have a set of fresh and actual market data, which is obviously in the interest of all stakeholders. In this regard, we count on the understanding of all involved and look forward to their spontaneous co-operation.

International Sleep Experts

File – Part II

This year sees the publication of the second brochure focussing on research and key findings of leading international sleep specialists and experts with regard to the growing importance of sleep quality and its positive impact in various areas of our society. The scientific evidence provided is also destined to be an actual source of information and additional incentive for the media, when reporting about sleeping habits of EU citizens and the undeniable contribution of good quality mattresses and up-to-date bedding systems to a good night's rest in these stressful times.

Supplier Council

For the 5th consecutive year, EBIA's management team met with a leading delegation of associated members, major suppliers to the bedding industry. In conformity with the tradition of the past, the meeting was held in an atmosphere of openness and was focussed on topics of mutual interest & co-operation in these difficult times for the industry in general.

EBIA representatives presented an overview of the association's activities in the past year, particularly as regards the progress of the bedding business research study, the mattress research with ISPA, the EBIA Award, flammability, Eco-label and EOL issues.

The associated members from various supplier segments shed light on global market conditions, raw material supply & outlook, specific sector activities and also had the

opportunity to formulate any suggestion towards EBIA.

For this occasion EBIA also invited two guest speakers to update us on matters of common interest. Dr. Axel Kamprath, Secretary General of Europur & Euromolders gave an overview about the "Status of the Certi-PUR standard", whereas Miss. Bénédicte Hendrickx, Adviser at the European Panel Federation focused on the recent "EU economic outlook & actual market tendencies".

It has been convened that the Council will again reunite in May/June 2010.

Relations with members and related industrial associations

EBIA is very much concerned with fostering the existing and new relationships and contacts with both its members and cognate European and International organizations sharing the same objectives and having converging ideas on how best to reach them. Meetings are regularly held to shed light and discuss actual developments and hot issues in our sector and EBIA's management team pays visits to our members taking part in all major international bedding fairs – a welcome opportunity for contacts and a quick exchange of ideas on what is taking place and what should be addressed.

In this context, EBIA will continue its efforts towards being the potent, pro-active, creative, recognized, respected and instrumental arm of the European Bedding Industry.

Biocides Directive (France)

In view of the implementation of the biocides directive by the Ministry of Environment (MEED-DAT), the FCBA reminds all producers and importers of bedding articles of parts of bedding incorporated in furniture (cushioned sofas, sofa beds, baby mattresses ...) that they have to declare and give information on active biocides present in their products, including the concentration thereof. The technical institute FCBA and sector professionals have collaborated with the MEED-DAT on the elaboration of a résumé allowing the producers and importers to easily verify the inventory of biocides as well a note on how to make an online declaration on the site of MEED-DAT. Part of this information will be accessible to the end-consumer who might wish to know if biocides are present or not prior to buying the new bedding system.

(Source Market – n° 494 juillet/août 2009)

Press Release: The Renaissance of or: What Customers really want (to



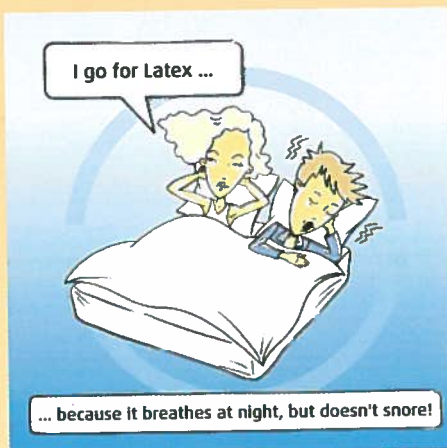
Nijlen, Belgium, May 2009. Internet providers, special offers, superstores - if you want to survive as a specialist dealer today you have to position yourself very clearly and concentrate on your core competence: individual sales advice. Why? Because professional, personal advice is indispensable in the mattress business. But what do customers really want to know when it comes to mattresses? What are the current needs and expectations of the consumer? A trend survey carried out on behalf of euroLATEX, the association of European producers of latex foam and mattresses, provides us with answers to these questions. According to the survey, the properties customers are looking for are comfort, durability, breathability, the capacity to conform to the body's contours (point elasticity), modernity and flexibility – the renaissance of the latex mattress?!

Spoilt for choice? Let your customers rest assured!

Anyone looking for a mattress these days is spoilt for choice: good advice is called for - and that is where the specialist dealer comes in. The latest trend survey concludes that a recommendation from a specialist dealer still has the greatest influence on customers. 64% of all customers do, after all, buy their mattresses from a specialist dealer. They appreciate the professional and personal product advice and the possibility to do a "test sleep" – that is good to hear. Dr. Ulrich Leifeld, managing director of the Fachverband Matratzen-Industrie (German Mattress Industry Association) commented: "The results of the survey concord with our experience over the years: people want a lot of information when they buy a mattress. This is where the specialist dealer can score points by going into the things that particularly interest the potential buyer – and showing him where and how he can get the best night's sleep."

almost half of those asked would consider latex when buying a new mattress – if they could get more information about it. And: over a third of buyers would also pay more for an excellent, top quality product. That is something that should be taken advantage of, especially since the outstanding technological characteristics of the material justify the prices of these mattresses.

Latex has always been one of the very best core materials thanks to its unique qualities, but when we consider the ageing and health-conscious population, it is also the core material of the future. Latex does not lose its shape and always bounces back into its original position – almost like rubber. The reason is to be found in the special elasticity of the core material. The result: no springs, no unevenness, so that you can move about as much as you want and still get a comfortable night's sleep.



At the top of the wish list: comfort

What do customers expect of a perfect mattress? In first place comes comfort (83%), followed by durability or stability of the core material (70%), breathability (61%), point elasticity (capacity to conform to the body's contours (59%) and flexibility (55%). All qualities that go without saying for a latex mattress. So it is no surprise that



The Latex Mattress – (what you don't know)

The mix of hard and soft foamed molecules produces a highly flexible material whose round cells gives optimal back support in every direction and conforms ergonomically to the body. The relatively heavy weight of latex mattresses also enhances the quality of sleep. Latex is the best and most dense material you can sleep on. A heavy mattress does not lose its shape as much and is consequently highly resilient. Comfort is guaranteed for a long time, especially for particularly tall and/or heavy people.

With latex we associate the capacity to conform to the body's contours, high point elasticity and stability of form. But only a very few consumers are adequately informed about these properties. Only 13% say that they know a lot about latex as a core material. Dr. Leifeld is horrified by these figures: "Surveys tell us again and again that the end consumer wants to be properly and thoroughly informed. They would like to find out the advantages of different technologies for themselves in a specialist store. The three leading types of mattresses – latex, spring and foam – should be available for customers to try out in any good specialist store. I regret the trend to specialise in one particular sort of mattress."

Latex mattresses scored well in a consumer survey: 89% of people who sleep on a latex mattress said that they were satisfied to very satisfied with their product. What they appreciate most is the high level of comfort (59%), quality characteristics (23%) – e.g. flexibility or that they are ergonomic and healthy and conform to the body's contours – and stability (13%).

The seven-year itch: when the mattress has to go

A quarter of the participants in the survey keep their mattresses for seven years or longer. These figures are no surprise to Dr. Leifeld: "When it comes to care, hygiene and new mattresses there is a huge information gap. But this is another area where specialist dealers can really come into their own: there is actually a much higher need than demand alone would suggest. Active clarification is required here – and a few extra sales could come out of it."

Once you have found the right mattress, there is still more advice to come, because

no mattress is any good if it is not treated properly. But: the right mattress and the right care guarantee long-term satisfaction – ordinary customers become regular customers.



Box: care instructions

- Always protect every mattress with a removable and washable cover.
- After you get up: air it briefly to dissipate moisture
- To ensure that no moisture collects, it is better not to cover the bed with a bedspread.
- Bedroom temperature should not fall below 10°C at any time during the year.
- And you should buy a new mattress every seven to ten years.

About euroLATEX

euroLATEX is the representative body of all major European producers of latex foam components and mattresses. Following the motto of "United we are strong", leading international latex producers and processors joined forces in 1990 in order to represent the mutual interests of industry, retail trade and consumers. Today, almost twenty years later, the European companies Artilat NV, Dunlopillo SAS, Dunlopillo GmbH, gommagomma s.r.l. Latexco NV, Sapsa Latex SAS und Sapsa Latex s.r.l. are members of the association. At interzum 2009 the association has a surprise in store with its refreshingly new and cheeky communication campaign "I go for latex...".

The 2009 EBIA Award goes to: Dr. Damien Léger, Sleep & Vigilance Centre of the Hôtel Dieu de Paris

EBIA's 10th Jubilee General Assembly held on 8 & 9 October at the Radisson SAS in Brussels saw the attribution of the annual association's award to Dr. Damien Léger of the Faculty of Medicine at the Descartes University in Paris, France.

Dr. Léger is today considered as being a leading authority on sleep in France; he is actively involved in research programmes and trials on new sleep support systems; he is also the author of several articles in national and international media on sleep disorders and he published various books, including "Bien dormir, enfin" and "Sleep disorders: impact on Public Health".

A prolonged lack of sleep has an impact on health, contributing to the development of anxiety, depression, obesity and even diabetes. During the day, this lack of sound sleep may also give rise to drowsiness, which in turn is the leading cause of road accidents in France.

EBIA's Award Jury praised the significant value of Mr. Léger's groundbreaking work, both to the patients to whom it provided significant relief and his colleagues for whom his daily efforts provide a source of lasting inspiration. By attributing the 2009 Award to this distinguished scientist, EBIA wishes to support him in his ongoing research in the area of sleep and sleep support systems and trusts that more interesting and industry relevant findings will emerge in the near future – findings that can benefit the European Bedding Industry in its pursuit to constantly improve its product range with a view to contributing to the overall well-being of the European bedding consumer.



Brussels... the vibrant

Brussels is a cosmopolitan city, with liveliness and an appeal that are intimately related to its role as a crossroads for all of Europe. Architectural styles range from Gothic cathedrals and churches to the gracious classical facades of the Palais des Nations, the Royal Palace and to the many art nouveau and art deco houses in the comfortable neighborhoods where the Bruxellois live.

The heart of Brussels and the place to start getting to know the city is the Grand'Place. This historic square, lined with exuberantly ornate guild houses and focused on the Gothic heights of the Hotel de Ville, is widely held to be one of Europe's finest.



The Grand'Place is also, as it has been for centuries, the focal point of the city's social and civic life. The people of Brussels gather here for their most important ceremonies and festivals, for the traditional bird market on Sunday mornings, and - perhaps most importantly - for no task more pressing than to sit, have a beer, and let the world pass.

Every neighbourhood has its own market as Brussels is a city of markets: the bird market, the flower market, the antique market, the flea market, and the horse market. Vendors bring fresh produce from nearby fields, cheeses made in farms and abbeys; hams cured in the Ardennes, flowers and potted plants, chickens, rabbits and fresh caught fish, shrimp and mussels from the North Sea.

At the corner of the Rue de l'Etuve and the Rue du Chene, stands the fountain of Manneken-Pis. The statue has long been a beloved figure in Brussels, having come to be regarded as an honored citizen of the town. Kings, Presidents, and celebrities have given costumes to the Manneken Pis. He now has a wardrobe of more than 250 outfits which are housed in the Musée Communal.

To the east of the Grand'Place, the ground rises toward the upper town where the Royal Palace and the House of Parliament sit. In between these two is a formal park with fountains in the French style with

statues where Belgians fought the Dutch for their independence. Slightly to the south is the Place du Grand Sablon, the centre of exquisite antique galleries and sumptuous restaurants.

Just to the north of the Grand Sablon is the Royal Museum of Fine Arts, which comprises the museums of Ancient Art and of Modern Art. Both possess enormous collections featuring many outstanding works. Among the rooms not to be missed is the collection of Flemish paintings from the 15th and 16th centuries. All of the major artists are well represented here including Robert Campin, Rogier van der Weyden, Hugo van der Goes, Dirk Bouts,



capital of Europe

Hans Memling, and particularly, Peter Breughel the Elder. There is an entire room devoted exclusively to Breughel's work, including his Landscape with the "Fall of Icarus." The national sons, Peter Paul Rubens and his disciple, Anthony Van Dyck have an impressive presence.

There is no shortage of entertainment events in Brussels, and in keeping with the city's cosmopolitan outlook, these are widely varied. They range from the annual Queen Elizabeth Music Competition, which draws aspiring classical musicians from all over the world, to the annual Jazz Festival in Brussels which attracts legendary jazz stars to the city. The Theatre Royal de la Monnaie consistently offers first class opera and ballet. In the Palais des Beaux Arts, symphony and chamber music concerts are programmed year-round. There are cinemas with American films in their original version, nightclubs and discos to satisfy even the most energetic. Don't forget the folklore and pagentry integral to an understanding of Belgium, with the Ommegang Festival, the first Thursday in July or the Parade of the Giants in May.



Mussels in Brussels are a must! They are prepared in a variety of ways and are a bargain in season. All Belgian food is of course delicious. Proportions are huge,

so try to save room for dessert. Chocolates, waffles and cookies are everywhere. And after all, you can always go on a diet afterwards...



Country Reports

Belgium

As announced last year the economic crisis already had some impact on the bedding market at the end of 2008.

Positive is that Belgium still had a slight growth over the whole year but only thanks to higher average prices. The volume was constant compared to 2007.

Also remarkable is the fact that the market for spring mattresses is still growing because of the continuing success of box spring systems.

On Monday night at the Brussels furniture fair (starts 1st weekend of November), all members of the Belgian sleep council welcomed once again all bedding retailers for a drink, shop talk, ...

The Belgian Federation has not interrupted the promotional efforts and continued broadcasting on national radio during spring and autumn. In 2009 the Belgian sleep council completely relooked its website to make it more attractive to the end consumer, who now also has the opportunity to ask questions.

France

As far as France is concerned, UFL and APL are continuing to promote bedding for both consumers and retailers. The 3 main arguments are highlighted as often as possible: 1-Replace your bed each 10 years at least, 2-Replace mattress and divan together, 3-Think king or queen sizes instead of 1.40 x 1.90 French traditional bed.

The means to enhance this promotion are: consumer communication (event and advertising), health actions, new website and close relationship with press.



Consumers Communication

Four main actions:

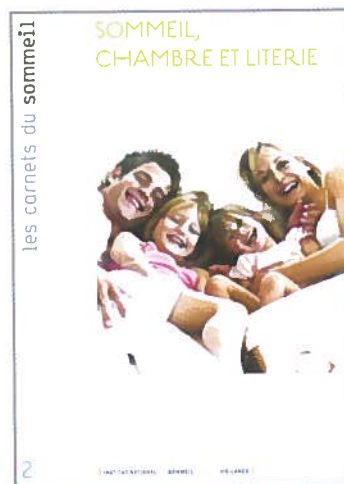
- **June**, promotional event: Giant beds (6 x 2 meters) in 8 of the main railway stations in Paris, Steasbourg, Lille & Nantes on 16th June. 150000 leaflets including main arguments developed by APL and specific study about French sleeping habits (BVA Healthcare for APL) were delivered to the travellers. The event was in relation with our new designed website infoliterie.com. The leaflet invited consumers to a contest which generated more than 17000 registrations!

This event generated several articles in generalist and professional press, and on TV and national radio.

- **Last week of August**: 22 radio spots (shown as a dialogue between APL and a well known presenter)
- **September to December**: women's press, home and deco magazines.
- **October**: special operation in the national general press "le Parisien" (16 pages).

Health

- Press conference on the results of the "clinic study" realized in 2008 by the Sleeping Center of "Hôtel Dieu de Paris" for APL met a real success. The study shows scientifically that the quality of sleeping is better on a new mattress than on an old (10 years) one. It shows also that the activity during the day is much more efficient. This press conference produced a lot of articles in all types of press (public, pro, women, medical...) and participation to 6 TV shows.
- We create, in association with the "Institut National du Sommeil et de la Vigilance" (INSV), the first "Carnet de Sommeil" (sleeping book)= 20 000 copies printed for the 40 "French Sleeping Centers" and all Departmental and Regional Health and Social Organizations.



Book
INSV

Organization, in collaboration with the European Sleep Center, of 2 focus groups involving doctors in charge of health in very important groups (banks, railways, automotive producers, medicine laboratories, etc). Objective: 1- "Think bedding ! It is important for the health and efficiency of people working in your group". 2- Put information in all waiting rooms.

- Two epidemiological studies Junior and Senior; results expected in September and press conference in October.
- Sending of our Comic strip "Une affaire de tout repos" to 20000 generalists doctors and physiotherapists (for them and the waiting rooms); satisfaction test in progress (1000 doctors).



Press relationship

- UFL/APL is very well represented in round table conference et professional press
- We increase our presence in the consumer press in collaboration with our Press Relation Agency (4 press releases / year).
- We reached 99 articles in both trade and public press from 1st January 2009 to 31st July 2009.

General Assembly: The General Assembly took place for the second time at the first floor of the Eiffel Tower in Paris with the same success as last year. Besides APL's members, all our associated suppliers and some prospects were presents and happy to be there! The event was widely reported in the press (even medical press).



Le Président
José-Antonio Gonzalez



Les intervenants
Dr. François Dufoz, Gérard Laizé, Gérard Delautre, Jean-François Gréco, Pf. Damien Léger



Internal Communication: In order to improve the communication about our actions to UFL's and APL's members and professionals, the extranet of our website was changed and also a Newsletter was created in June.

Technical Committee: Technical Committee members are closely following the developments of laws (and future ones) especially about fire, end of life of products and environmental labelling. Distributors are obviously concerned and they asked to participate to the UFL Technical Committee; we therefore created an APL Technical committee including the main retailers (only 2 meetings a year).

Germany

At present, the German bedding industry is still suffering severely from the world economy crisis that struck all German business sectors very hard.

Key businessmen and experts of German economy are prognosticating that despite a slight growth in economy in spring and summer 2009, the end of the crisis has not yet been reached. Dennis Snower, head of the Institute of World Economy in Kiel, mentioned in several newspapers that he cannot see any signs of a quick a sustainable recovery in German economy.

The chairman of the German Council of Economic Experts, Prof. Dr. Wolfgang Franz predicted that there will not be any kind of rapid upward movement as recession has not been overcome yet and the slowdown of global economy might be a key issue to prevent German economy from starting up again soon. Franz warned that Germany might face a growth of -5.5% in 2009 which will definitely lead to bad consequences for the employment market.

The chief economist of the Deutsche Bank recently said that it is much too early to speak of any kind of economic revival: "we are walking up out of the valley with very little steps".

We can confirm all these statements if we are talking about the mattress industry in Germany. The concentration of retailers in trade associations are putting very much pressure on all kind of producers, finally choosing the one with best conditions, sometimes even under manufacturing price level.

Consequences are obvious: some companies do no longer produce in Germany; others have to let go a lot of employees to do the same business with less human power.

We guess the average growth in the mattress industry is somehow identical to the German economy in total, about -5.5 %. We can see that some mattresses get cheaper and cheaper and we all are wondering where the end of the price spiral might be. Only very few other voices can be heard by those who produce high quality mattresses. Those Germans who still have money are willing to pay for high quality, wellness, good sleep, health and of course good expert's advice at the point of sales.

The German mattress association has lost Silentnight-Houben and H. Schulenburg (Olympia) as members in 2009. One company got into insolvency, the other one closed down production. As new member MFO (Matratzen Outlet Factory) joined us.

Next year we are planning to promote the "year of good sleep 2010", as we feel it is very important to inform the public about the benefits of good sleep. This is much more interesting than talking about mattresses and their technologies, but this should finally lead the customers to reflecting about their bedding system again. Our key claim in accordance with EBIA's initiatives will be "A life circle of a mattress is seven to ten years – due to hygiene aspects."

We invite all companies active with any kind of sleeping products in the German market to join this initiative. An attractive webpage and several events will be planned by the Fachverband Matratzen-Industrie throughout the year. We especially aim to get into closer contact with the health sector such as medical doctors, practitioners and all others where people with back pain and allergies seek advice. We also put a lot of efforts in media work, eg we worked with the TV station PRO7 TV on the infotainment show "Galileo", where they talked 10 minutes about all the benefits of a good mattress in December 2008.

As an association we need to do something for the market that makes the public become aware about the contribution of bedding systems to good health. We are seen as "neutral informers" by the media and public and take a chance to use our position to make the most urgent messages of the industry heard.

The sales figures have even shrunk once again, both in volume and value. The preferred technology of the German customer seems to be foam, whereas the market shares of latex and springs are still decreasing.



Italy

The most significant development of year 2008 was... no development! It means we did not face relevant growth or decrease.

During the first semester of 2008 we noticed a steady market compared to 2007. Decreasing consumer confidence and the financial crisis made the demand drop quickly during the second half of the year.

The Italian market is crowded, i.e. the offer is much larger than the demand, although there is a noticeable growth (volume) of non-brand products.

Almost all major companies tried to maintain their positions on the market by offering special conditions and special prices to dealers, so as to guarantee their space on the shop floor.

Unfortunately, only few companies in Italy are seriously oriented into the "sell-out" process. The main target of the majority of producers still remains the "sell-in". Consequently whenever there is a decrease in demand, volume drops quickly.

Spring mattresses, either open or pocket coils, still maintain leadership in terms of volume, probably due to wider price ranges - best known kind of mattresses, and/or easiest selling for the dealer. Pocket coil is growing in volume, and the sales volume of spring mattresses is considered quite stable globally speaking.

Latex mattresses have been suffering a considerable drop in the last years, mainly because of PUR growth, clearly generated by HD material, and its huge advertising investment.

Other materials or different technologies, such as air, water, wool, etc account for a very small volume (actually a small niche).



The Netherlands

Insufficient demand has a devastating influence on the bedding and furniture industry.

'The image of the bedding and furniture industry is still poor', that is the conclusion of the CBS (Central Bureau of Statistics). Business people in general are rather pessimistic as to their expectations for the next three months.

In the first quarter of 2009 the volume in the mattress industry decreased by 15%, in financial terms -9%. Especially polyurethane went down by 27%, springs decreased by 12%, and rubber by 9%.

Last May the results of the bedding and furniture industry were disappointing: the turnover was 16% lower compared to the same period last year.

In June the entrepreneurs again faced a strong decrease in orders. The index order position decreased to 80.9. The finding on the total order position increased slightly, but is still negative. Also the view on the foreign order position was very bad. The opinion on the stock ready product appeared positive, this contrary to the month before.

In general, the first half year of the mattress industry shows a decrease of 17% in volume and 13% in turnover: -23% for polyurethane, -16% for springs and -10% for rubber. Box springs also lost a lot, namely -22%.

For July to September the entrepreneurs again expect a production decrease.

Furthermore, the tendency of the market shows that the entrepreneurs feel that the competitiveness on the inland market has improved. The competitiveness in the trade inside as well as outside the EU has deteriorated. The degree of capacity utilization decreased to 74.1 in the second quarter. However, they expect a decrease in sales in the third quarter. 36% of the interviewees state that the insufficient need forms an obstruction in the production.



Spain

The results of the 1st study on health and rest were presented during several press conferences, as part of Asocama's Strategic Communication and PR Plan.

The study concluded that Spaniards consider the quality of their sleep as a determining factor in their quality of life, more important than the number of hours slept, eating habits, and sports activities. They are also aware that a bad night's sleep may affect concentration at work.

According to the study, Spaniards are generally content with their health: 61.3% of the population considers their health to be good or very good. However, up to 32% awaken each morning tired and without energy, or with muscular pain; this percentage increases proportionally with the age of the mattress.

61.5% of those surveyed mention their beds as an important factor affecting the quality of their sleep, only surpassed by stress (76.5%), and heat (72%), followed by routine, cold, and lack of exercise.

The study showed, however, that not too much attention is paid when choosing a mattress: only half of the population changed mattresses after 10 years (there are even some who continue to use the same mattress after 20 years!).

Upon changing mattresses, it is quite surprising that 46% never bothered to try it out prior to the purchase. Asocama recommends that people choose their mattresses based on their physical characteristics and sleeping habits, and sharing it, trying it out with their partner prior to their purchase.

The aspect which was most positively rated by those who tested the mattress was comfort (47.6%), although recommendations were taken into account (30%), as well as price, firmness, and materials used.

See you all again at EBIA's General Assembly in 2010!