

EBIA

european bedding industries' association

NewsMagazine



Welcome aboard

" Making forecasts is very difficult, especially about the future " goes a popular saying. Very true, more than ever. In newspapers, news channels and various magazines we are confronted with rather mixed and often conflicting messages about the state of our economy. On the one hand Economic Sentiment Indicators edge up in a majority of Member States, strongly influenced by markedly positive readings in Germany. But in other countries, like the UK and the Netherlands, improvements are less pronounced. In Spain sentiment even further declined.

But overall the improvement in the majority of Indicators seems to suggest that economic activity in the European industry will continue to recover in the coming months, although it has still some way to go to reach the pre-crisis level. Expectations need to be cautious. Against this very blurring background and according to the various country reports, the European Bedding Industry is holding on quite well, certainly compared to a number of other business sectors.

Despite all this uncertainty that will continue to face us in 2011, we already know that EBIA will have a great start to the year. As a matter of fact, and after a few years of hard work and many discussions, we can proudly announce that, as of the 1st of January 2011, the British Bedding Federation NBF will join EBIA.

Needless to say that, this cooperation will largely contribute to the represen-

I want to especially thank NBF President Anthony Joyce for his understanding and vision, his help in bringing both organizations together, and his facilitating role to come to this agreement and cooperation.

As a more than ever European Organization, EBIA will continue to strive to further increase consumer awareness about the importance of a good night's sleep, to organize and promote market research to better understand the needs of our end-users, and to contribute to an overall improved product and service offering. All of this, without any doubt, to the well-being of our European Bedding Consumer.

I hope that our General Assembly in Sopot, where we will present again a number of most interesting speakers, may be very inspirational to all of you. All the best for another busy and exciting year and see you at the GA.

Frank Verschuere
EBIA President
September 2010



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Jubilee General Assembly of

Brussels ... capital of Belgium and the European Union is not only the second international city in the world as measured by the number of headquarters of international organizations, but it was also the host for EBIA's 10th Jubilee General Assembly last year.

With its more than 1000 years of rich history, the city offers a multitude of fascinating sights to visit. The Radisson SAS, was located in the heart of the city offered not only state-of-the-art conference facilities and only some minutes from all major attractions, typical beer cafés and shopping streets of Brussels.

In opening this Jubilee reunion of the European Bedding Industry and welcoming the large international audience, President Frank Verschuere particularly emphasized the crucial importance of the continuous support that EBIA's members provided to our organization during the past decade. Their commitment and vision in various areas of specific interest are greatly valued, as is the time spent in the interest of our entire industry. In presenting a chronological summary of the association's multiple activities in the past, he underlined that EBIA has worked hard to defend the interests of its members at various relevant levels and to increase consumer awareness as regards the fundamental importance of a good night's sleep – this by providing consumers and other stakeholders with correct, actual and useful information.

"By doing so" President Verschuere stressed "we tried to make a modest but palpable contribution to an overall improved product and service offering and hence to the well-being of the European bedding consumer. We still have a lot of work to do but are more than ever moti-

vated to undertake whatever is required for our great Bedding Business, thereby ensuring that everybody in our markets can enjoy the good night's rest that they deserve". He sincerely thanked EBIA's Management team for their dedicated and professional approach during the past years and expressed the hope that this 10th Anniversary meeting will prove to be informative, instructive and fulfilling to all participants.

In line with the tradition, EBIA Secretary General Endre Varga then presented to the General Assembly the federation's annual report, thereby focusing on a number of actual technical and business topics, activities in the area of PR & communication, developments in the relationship with the services of the European Commission and cognate EU industrial associations, the annual meeting with representatives of associated members from the supplier industries and the general work of the EBIA secretariat. Particular attention was also given to the analysis of the results of the Bedding Industry's annual statistics survey, the latest EC Economic indicators and forecasts, as well as the organisation's financial situation.

Combined guest speaker sessions

EBIA was pleased to be able to contract a select group of prominent (international) guest speakers, who gave lectures on actual marketing, economic/financial and technical topics:

- 'The Bedding Industry 2015. Become tomorrow's winner by addressing today's challenges and opportunities' by Gino Van Ossel – Results of the study commissioned by EBIA
- 'The crisis: is it really getting better?' by Edwin De Boeck, Chief Economist KBC Group
- 'The magic power of your enthusiasm' by Eric Van Vooren
- 'Sleep and bedding: synthesis of the studies by APL et Hôtel Dieu Sleep Centre' by Damien Léger, Sleep and Vigilance Centre of Hôtel Dieu Paris
- 'The Marketing of Emotion: Solutions for Selling Bedding' by Georges Chétochine *



the European Bedding Industry in Brussels



EBIA's 10th General Assembly – Brussels, Belgium

Gala Dinner & Attribution of the EBIA Award

The Vaudeville, a 19th Century theatre situated within one of Europe's most beautiful arcades, namely the Galeries Royales Saint-Hubert, welcomed all participants for the gala dinner.

The evening was also the occasion for the attribution of the EBIA Award – this time to Dr. Damien Léger from the Sleep and Vigilance Centre of Hôtel-Dieu in

Paris. Dr. Léger and his team are specialized in problems of insomnia or hypersomnia and they are doing a lot of epidemiological research. The Sleep and Vigilance Centre of Hôtel-Dieu also screens the relation between sleep and environment. The influences of noise, light, temperature, and bedding on sleep are inventoried carefully by Dr. Léger and his team. He also studies the relation between sleep and work.



Excursions

On Thursday afternoon, the companions visited Delvaux Maroquinerie. Delvaux was founded in 1829 in Brussels and it is as such the oldest fine leather luxury goods company in the world. Today, Delvaux still offers what most luxury goods companies can no longer offer: 'Luxury' in the purest sense of the word.



After having received information on the different kinds of leather and the manufacturing process, the visit turned into a workshop during which the participants made a small leather article.



The companions thereupon paid a visit to Chocolaterie Mary, which was founded in 1919 in Brussels and is holder of the Belgian Royal Warrant since 1942. "It is a great pleasure for the 'house of Mary' to serve chocolate lovers having one thing in common: being lovers of first-class pralines".



In the afternoon a bus tour to the outskirts of Brussels was scheduled: Atomium, Royal Palace of Laeken, football stadium, Chinese Pavilion, uptown, Tour & Taxis, Rue Royale, Congress column, Sablon, ... followed by a small tour on foot to the city centre: Grand Place, Manneken Pis, Royal Galleries St-Hubert, ...

Closing remarks & Press conference

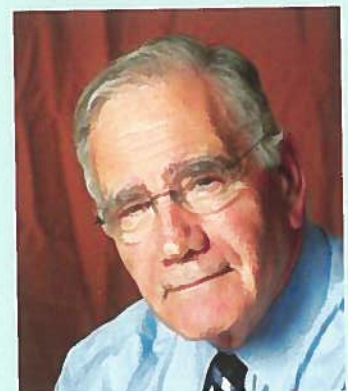
Mr. Verschuere closed the Jubilee General Assembly by thanking all present for coming to Brussels, in spite of the difficult economic times which the entire EU industry is facing. Nevertheless, he is confident that the creativity, innovative approach, competence and hard work inherent to the Bedding Industry will



progressively insure that good times will return to our business segment as well. The large attendance and global contents of the meeting have certainly decisively contributed to the success of this Anniversary reunion and the constructive and sincere communication between the participants indicates the presence of a growing wish for transparency and co-operation in various fields. It is in this spirit of understanding and common vision that EBIA sees the future of our industry, and this undoubtedly gives an additional impetus to our team to continue its efforts for helping to insure bright days ahead for our member companies. The joint lunch held at the hotel was preceded by a Press conference given by EBIA's Management team and attended by journalists from various member countries.

In memoriam : Georges Chétochine

EBIA mourns the sudden loss of Mr Georges Chétochine who passed away last spring. We guard a warm memory of a fine and inspirational gentleman and a visionary marketer who was a welcome guest speaker at past EBIA General Assemblies.



Gdansk, Sopot, Gdynia – The Tricity

Change of decor! EBIA's 11th General Assembly will be held in Poland in the inviting coastal resort of Sopot near Gdansk. Welcome to all!

Gdansk, Sopot, Gdynia – The Tricity

The Tricity, an urban complex extending along the Bay of Gdansk, is one of Poland's largest tourist attractions. Each of the cities making up the Tricity offers a different atmosphere. Gdansk is a Hanseatic town more than 1000 years old, while the lively Sopot and Gdynia are proof of the economic spirit of the Poles who, having regained their independence in 1928 after a century and a half of occupation, took less than 10 years to build one of the greatest ports on the Baltic.

The history of the Tricity is an important element of the contemporary consciousness of every Pole: it was here that the strikes of 1970, 1980 and 1988 set in motion the destruction of the communist system.

In 1980, Lech Walesa led the strike at the Lenin Shipyard in Gdansk, which became the cradle of the Solidarity social movement. The trade-union leader went on to become the president of Poland and winner of the Nobel Peace Prize.

Sightseeing, strolling, ...

Sightseeing around the Tricity is relatively simple, because the cities are like beads on a string – the transport linking Gdansk with Gdynia.

The charms of living in the Tricity combine harmoniously with natural attractions. The coastline offers a variety of environments, from the sandy beaches in Sopot and Gdansk to the cliff coastline of Redlowo and Oksywie. The vitality of flora and fauna on Sobieszewska land is truly amazing. The oldest and longest pier in Sopot offers a walk of 516 metres into the sea.

The heritage of material culture in the Tricity, despite wartime destruction, is impressive. The Main Town of Gdansk is a classic example of a Hanseatic town. The narrow façade of Mannerist house line streets that were once lively trading centres, and today attract tourists with their picturesque appearance. The narrow streets are full of life in all seasons.

The Tricity is also famous for fish. The Polish Baltic coast is rich in herring, cod, salmon, eel, turbot and flounder.

Beer famous across Europe has been brewed in Gdansk for centuries. Other local specialties include Goldwasser (a clear herb liqueur with gold flakes), Piolunowka (a modern version of absinthe) and Dzika Pszczoła (wild bee – a honey vodka with forest herbs).



Amber is a typical souvenir from Gdansk. If you fail to find any on the shore, there are ready-made amber decorative items and jewellery on sale at numerous souvenir stores in the Tricity.

Source: Poland : Cities and Cultural Heritage – Polish Tourist Organisation



EBIA Award 2010 to Jürgen Zülley

EBIA's 11th General Assembly held on 8 & 9 October at the Sheraton in Sopot saw the attribution of the annual association's award to Jürgen Zülley.

Prof. Dr. Jürgen Zülley is the authority when it comes to sleep research and sleep improvement in Germany. Zülley is head of a Sleep school in Regensburg, an institute that teaches private people how to improve the quality of their sleep. Often solicited as a spokesman of sleep in German talkshows, radio programs and lectures, Dr. Zülley is called 'the pope of sleep' in his country.

Dr. Jürgen Zülley is one of the rare professors who realizes there is a gap between the field of sleep research and the bedding industry. His mission is to make people more aware about their sleep.

"One of the elements of our sleep culture is a good bed", says Zülley. In Germany we sometimes organize sleep exhibitions and a lot of manufacturers show their products".

To Jürgen Zülley's opinion, most of the sleeping problems are due to stress or to a bad sleep hygiene. This means that they eat late, drink late and watch too much television before going to bed. The main conclusion of Dr. Zülley is quite simple: With a better knowledge of sleep, people's quality of sleep will improve. The feeling of being helpless is a major stress factor. Compare it with a car: when you have problems with it and you don't know anything about it, you will feel very helpless..." says Dr Zülley



Activities

2009 was by all means a demanding year for the entire European bedding industry and a time of focused reflection for EBIA's management team and Board.

Some of the activity topics are commented hereafter.

Business & Technical aspects

Flammability

Mattress flammability was an issue for a long time and has again become a 'hot' topic in The Netherlands where the media had invited the Dutch furniture and bedding association for a related TV debate. The introduction to the programme consisted of a spot in which two IKEA couches – one bought at IKEA UK and one bought in The Netherlands – were set on fire by means of a candle. The Dutch couch burnt immediately, where the British one containing fire retardant chemicals only burnt after 10 minutes.

The influence on the consumers was considerable and the dormant FRs controversy became very actual again.

EBIA has always had a clear position on the fire issue, and the Technical Committee has meanwhile actualised the existing position paper to be used in similar situations.

The Paris University flammability study has also been succinctly summarised with the purpose of serving as an argumentative tool when necessity arises (see annex). There are at present no specific questions on initiatives regarding FRs in other EU countries and the situation in The Netherlands has somewhat slackened, but EBIA remains vigilant and will closely follow new developments in this area.

ISO TC92/SC1: EBIA Liaison

This particular ISO Technical Committee deals with the various aspects of product safety and was lately charged with the task of elaborating mattress flammability norms as well. Though in principle this can be seen as a normative rather than legislative task, it is often that certain ISO norms are with time so lifted to a level where they become a factor of overriding importance. This is why the Board requested the EBIA secretariat to try having a permanent seat in the aforementioned committee in order to monitor ongoing developments which concern our industry.

EBIA's motivated application has finally been accepted at the relevant ISO TC meeting in Berlin on 29th April, and on behalf of EBIA's TC Mr Luciano Abrigo will henceforth represent the interests of the European bedding

industry. The next meeting of the ISO TC 92 is scheduled for next autumn in London.

End-of-life & Mattress Recycling

Another 'old' issue becoming actual again. In The Netherlands there is the initiative of a Dutch business man and his partners who plan to set up a recycling project for mattresses. He has 25 years of experience in recycling of tyres, sleepers, carpets, plaster and in composting. He sees possibilities in the commercial exploitation of mattress recycling and has founded the company RetourMatras BV. The collecting process will be set up through a 'removal contribution' which will in the end be paid by the consumer. This contribution is estimated at 19 EUR per mattress. Mattress producers and importers will first pay the contribution but the amount will be passed on to the consumer. The mattresses are collected at home and then brought to a recycling plant in the centre of The Netherlands. Mattresses will be dismantled by cutting them into slices. The iron parts will go to a blast-furnace, whilst the rubber and polyether are sent to a Belgian processing company. The recycled materials will then be put on the market as filling material, sound insulation material and shock-proof packaging material. What is left will be gassed in a so-called plasma incinerator which will generate steam that will be sold to power stations. The whole process will ask for an investment of approximately 24 million EUR.

The Dutch industry has closely followed up the project, but recently decided not to participate as in general, they are not too confident. They feel that there are too many loose ends and that the financial foundation of the processing plant is too unstable. The final price for the 'removal contribution' is too high and it is too early to have all manufacturers and importers at equal level. They all agree that recycling is a good option and therefore the industry has decided to do its own research into the willingness of the largest retailers (in The Netherlands Ikea and Beter Bed) to recycle mattresses and in which way. The Dutch mattress association has a better feeling with this 'top-down' approach than the 'down-top project' of the aforesaid businessman.

Secondly, the authorities have informed the industry that the removal of mattresses from the household waste has become a priority. At this moment, mattresses are collected by the municipalities and then burnt. Land filling is forbidden since January 2010. Incinerators have problems with the mattresses due to their dimensions and their bad burning

characteristics. The authorities have asked the industry to develop a recycling system; this system will be completely voluntary and there will be no legal regulation. The authorities are, however, willing to give a helping hand if 75% of the industry and importers agree to set up the system and consequently force the remaining 25% to collaborate.

In Austria mattresses are burnt with the household waste and there is no recycling project.

In France, the so-called 'Grenelle de l'environnement' led to lots of meetings which resulted in laws to be more respectful for nature, be green, ... Mattresses are focused as they are often dropped on the roads and left behind. Some new initiatives for recycling have lately been set up, but full details of the project are yet to be diffused.

Spanish mattresses are mainly used for landfill and some are burnt.

Italy: In Milan, mattresses are mainly burnt. In the South of the country, mattresses are left behind in the road. In other regions, they are used for landfill. In Italy, recycling is / would be very difficult because of the laws.

EBIA has a detailed recommendation on the end-of-life matter as well, and the Technical Committee will analyse whether emerging facets and new approaches to the recycling issue merit and justify to make the document topical.

EBIA Award

Out of the nominations sent in by the national associations, EBIA's Board has withheld – in conformity with the set procedure – two distinguished candidates for the 2010 EBIA Award, to be officially presented at the forthcoming General Assembly in Poland of October. This year's finalists are Prof Dr Jürgen Zülley from Germany and Prof Richard Goossens from The Netherlands.

Prof Zülley has since 1973 been deeply involved in sleep research, whereas Prof Goossens is supervising research in the field of biomechanics since obtaining in 1994 his PhD on a thesis on biomechanics and body support.

Sales Manual

Apart from the English version of the manual, the Belgian and German versions have been completed and put on EBIA's website. The translation into Italian is in its final stages.

Country Reports

Belgium

Total market in Belgium slightly declined in value (-2%), but volume overall was at -7% .

In general average prices of mattresses were higher compared to 2008 (+5%), but mainly for spring mattresses average price has increased with 11%.

This is the consequence of ongoing success of box spring systems, now taking more than 45% market share for bases in value ! The value of slat bases decreased again with 15%.

The trend of 2009 continued at the same pace in the 1st half of 2010.

The Belgian Sleep Council continued its promotional efforts in 2009, and focused on a radio campaign during spring and autumn. At present the Board members are working together with an agency to elaborate a marketing campaign for 2011 and the coming years.



France : UFL - APL

Also this year the same objectives (promotion of branded and quality bedding for public, medical profession and retailers) and same actions but with an improvement of means, introducing a new concept in the communication "*Bedding = pleasure and welfare*", and new media, i.e. social networks and bloggers on the web.



National Events - two main actions:

19th March : "Journée du sommeil" (sleeping day) in association with the National Sleeping Institute (INSV), distribution of 10.000 comic strips "une affaire de tout repos" to 60 participating sleep-

ing centers in France, and participation to the "Sleeping Village" in Paris. Good impact on visitors (public) and media.

25th June: continuation of the 2009 promotional event: 7 giant beds (6 x 2 meters) exposed in 7 main railway stations in France, involving 170 people (sleepers and leaflets distributors). The new claim "Avez-vous pris du plaisir au lit cette nuit?" was very attractive and widely reported by press, radio, TV and web.

APL's actions also focus on several other aspects of a successful promotion for quality bedding: health with the signing of a new 3-year contract with Hôtel Dieu de Paris and Dr. Damien Léger, reinforced advertising, improved press relationship, website with a new logo, internal communication, technical committee's activities with an emphasis on legal developments in the area of end-of-life and recycling as well as environmental labelling.

BESOIN DE VOUS RESSOURCER ?



SINON, VOUS POUVEZ COMMENCER PAR CHANGER DE LITERIE

Pas besoin de partir au bout du monde pour retrouver bien être et vitalité. Et oui, votre cure de prévention est (entièrement) prise de vous - au pluri! en dessous ! Car une bonne literie n'est pas seulement l'allié d'un meilleur sommeil, c'est d'abord l'assurance d'une meilleure réception pour une vie active de qualité !

Pour bien choisir votre literie, reposez-vous sur les conseils des grandes marques de literie et des principaux distributeurs français réunis au sein de l'Association de la Promotion de la Literie.

- Changer de literie tous les 10 ans
- Pour plus de confort, optez pour une largeur de 160 cm
- Choisissez le sommier adapté à votre matelas

Retrouvez tous nos conseils sur infoliterie.com

ENVIE DE RETROUVER DU PLAISIR ?



SINON, VOUS POUVEZ COMMENCER PAR CHANGER DE LITERIE

Et si le plaisir était d'abord une question de literie ? Un plaisir que ne dure 25 ans en moyenne... et s'échappe le temps que l'on passe à dormir pendant toute une nuit... mais à condition de changer sa literie tous les 10 ans, matelas et sommier ! Car passer 10 nuits, votreouchage aura perdu ses qualités et propriétés essentielles au plaisir du bon dormir.

Pour bien choisir votre literie, reposez-vous sur les conseils des grandes marques de literie et des principaux distributeurs français réunis au sein de l'Association de la Promotion de la Literie.

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l'as-tu vu quand tu dors ?

Postez vos photos de dormeurs insolites et votez pour celles que vous préférez !

4 literies complètes de grande marque à gagner pour ne plus jamais dormir sans son lit.

€1.000



Germany

Currently, the economic recovery in Germany is beginning to accelerate throughout all sectors. The Ifo's (Institute for Economic Studies) confirms that "Business Climate for industry and trade" in Germany has risen sharply in July. This increase is the largest since German reunification. Most companies have reported a considerably better business situation than in previous months. Their business expectations for the coming half year are also more optimistic than in the first semester 2010.

The German Chamber of Commerce and Industry (CCI) forecasts a growth of 2,3 % for 2010 and sees this confirmed by state-



ments of the industry. This is the result of the Chamber's economic survey in early summer 2010, in which more than 22.000 company responses were evaluated.

However, the good news has not become reality in the mattress industry. In the second quarter of this year, orders in the German mattress industry declined on average compared to same period last year. While demand in April was still almost at the same level than in the previous year, May and June often had to be completed with drops in orders. There were, however, significant differences both between the different product areas and various price segments. The trend for spring mattresses is positive and the development for foams has significantly changed for the better, while latex is still marked by severe, even extreme losses. The entry-level and the middle market segment showed downward trends in the second quarter. In contrast, providers in the high quality level also reported about isolated increases for the period April to June.

The German mattress association has welcomed two new members in the beginning of 2010, namely Lück/Bardenia and Akva Waterbeds.

The German mattress association has declared „the year of good sleep“ for 2010 to communicate the importance of good sleep and appropriate sleeping systems as a topic of general interest to a broad public. According to EBIA's initiatives our key claim is “the life circle of a mattress is seven to ten years – due to hygiene aspects.”

The year of good sleep was conceived not only to involve the German bedding association and its members, but also to

initiate co-operation with other organisations that are active with any kind of sleeping products in the German market. The opening event at the fair IMM Cologne was a great success with a lot of positive feedback. EuroLatex and QUL, both associations for latex producers, joined the activities.

At the same time the book "heavenly sleep - a guide about healthy sleep" and the new website www.schlafauskunft.de (sleep information desk) were presented. In co-operation with the trade magazine "Möbelmarkt" an event themed "the future

of the industry" will be held for participants from the industry in September, media-related accompanied by Möbelmarkt. As a consumer's event, an information area and presentations on the fair Heim+Handwerk (home+trade) in Munich are planned for November. All activities go along with intensive media work.



2009: Crisis & Fear

If we should try to give a picture of 2009, we could summarize it in the above two words.

On the wave of worldwide financial crisis started in late 2008, the beginning of the year has been dominated by mistrust

feeling from consumers, reflected into a market decline.

The first 2009 quarter was tough and sales were offering a general, as well as significant, reduction compared to the same period of the previous year.

Media communication played a big role in such a situation, daily offering a dark picture, leading consumers into a very defensive attitude, which means saving

money by all means and cutting any kind of not strictly necessary purchases. Probably the furniture market, and bedding in particular, has been one of the most suffering sectors in the economy.

Bedding companies were mainly concentrated into sell-in processes, trying to motivate dealers' purchases by offering

better conditions and prices. The result has been a growing price battle, based on unusual discounts on products and lowering the level of the demand.

Only few companies started different sales approaches, by selecting distribution, qualifying dealers in different levels, fragmenting the target markets and splitting up sales in different channels.

Some leading companies presented a fully new range of products, others reinforced their market strategy on different approaches to sales network (franchising, fully owned shops and so on).

Some "big names" suffered from the situation, going deeper into a serious financial crisis, other applied a deliberate discount policy with the result to accumulate huge losses and going into serious financial difficulties.

During this first 2009 quarter the growth (in volume) of no-brand bedding products was noticeable. Especially in Southern Italy, dealers approached the market by offering low cost products, not easy to be identified and to be compared by the consumer looking for the best offer.

In a few words: a policy dominated by a blindness strategy, aiming to save somehow sales and profit, based on a daily target, waiting for someone or something able to change the situation.

Unlikely, only few companies are seriously oriented into sell-out process. Main companies' target still remains sell-in. Therefore whenever there is a demand decline, volume drops down quickly.

Second and third quarter were a bit better, a slight increase on sales, thanks to a demand just a bit larger than before.

Some brands changeovers and a stabilized situation of the market created as-

sumption to modify strategies, starting a process aimed to increase visibility into the floor-shops, to reward dealers loyalty and to optimize distribution. If we could compare this situation to a car race: anyone is trying to get into the first lanes, in order to be ready whenever the economy will improve.

Traditional distribution is still suffering increasing competition from

- 1) mass distribution (super/ hypermarkets, large multi-specialists, large home decorators and cash and carry), where we had a significant increase;
- 2) TV sales (either on national or local network);
- 3) "old style" sales (door-to-door);
- 4) mail order and Internet sales.

We could estimate that more than 60% of the sales has been taken by these actors, offering their own products and the share remaining has to be split into a lot of manufacturers.

Despite this situation, the brands established a better position: marginality is calling and was not possible for traditional retailers (bedding specialists, small mattress and decor shops, traditional furniture independent shops) to get enough margins in no-brand sales.

In fact the most important dealers, especially in North/Central Italy, concentrated their sales on a few well-known brands. On the other hand, bedding companies have been asked/forced to increase advertising pressure, in order to feed the demand by consumers and support their sales.

In terms of different technologies we can say that there has not been a remarkable change.

Spring mattresses, either open or pocket coils, still maintain the leadership in terms

of volume. Reason could be that so-called traditional mattresses are still the easiest to sell. While pocket coil is growing in volume, we would consider quite stable global sales volume of spring mattresses. Latex mattresses have been suffering a demand decline in the last years, mainly because of absence in communication by the main brands and bad quality products. PUR is still growing, even though less than before. It is said to be the newest technology and creates sales motivation. The big threat for this technology is the total absence of entry-barriers: it is the easiest way to produce a mattress because anyone can find a PUR supplier and just by adding a simple cover, the mattress is done. Price range is the wider as well as the quality level.

Other materials or different technologies, such as air, water, wool and so on, are accounting for a very small volume, actually a small niche, to be constantly monitored but not to take into due consideration today.

In the first six months of 2010, despite constant signal of economy growth, the market remains steady and it seems not even being touched by an optimism sign. The situation will improve, expectation is to get a last quarter with a positive sign, but we are still very far from saying that the crisis is over. The real big and still unanswered question is about the changes that the most severe crisis after the second world war, will generate for our market.



Spain

SABRE Awards for the Asocama Campaign

INFORPRESS, the agency with which ASOCAMA is carrying out its public relations campaign, received the prestigious SABRE Award in the TRADE SECTOR category for its ASOCAMA project by Holmes Report.

ASOCAMA project's goal is to take its key message "change your mattress every ten years, for comfort and hygiene" to the general public.

As a basis for the communication campaign, an initial study was carried out on "Health and Rest," followed by another involving elite sportsmen, "Sport and Rest."

The Holmes Report grants the SABRE Awards annually to the best work in the areas of communication and Public Re-

lations (PR), and is one of the most recognized distinctions of its kind worldwide. The EMEA SABRE Awards acknowledge the achievements - in terms of branding and reputation - of PR campaigns demonstrating high degrees of innovation, integrity and effectiveness. In recent years they have become the most prestigious awards in their sector in Europe. This year's event featured more than 1,600 candidates in the contest's different categories.

Spanish Sports Success

In recent years Spain has made giant strides in its sporting achievements on the international stage. Football, tennis, cycling, basketball, synchronized swimming and motor sports are just some of the disciplines in which Spanish sports stars have achieved great success, both individually and in team competition. Spain's recent football victories in South Africa, in tennis at Wimbledon and US Open, and in cycling in Paris are clear examples of the streak of success currently being enjoyed by Spanish sportsmen.

The study on Sport and Rest conducted by ASOCAMA with elite professional sportsmen revealed that sleep is essential for optimal performance in sports. In fact, these professionals assign their beds

an importance of 8.5 out of 10 in terms of how they affect their performance as athletes.

29% of those surveyed say they had gotten up with muscle pain or noticed that they had slept badly due to their mattress's poor condition. Perhaps one reason that this group has occasional sleep problems may be a result of all their travelling: 52% spend more than four weeks away from home per year, and 19% spend more than nine weeks away. In these cases, respondents say that sleeping on different mattresses and pillows affects their sports performance even more than jet lag and general changes in their environment.

Upon returning to their homes and realizing the importance which professional sportsmen give to good rest, 76% de-

clared to have a mattress that was less than five years old (the average amongst the general population is 68.5%). Sportsmen choose mattresses that are larger than average. In this group mattresses measuring 150cm outnumber those of 135cm (28% and 18% respectively), with 6% even opting for the largest size: 180cm.

As for their sleep habits, before going to bed 53% said they watch TV and 25% that they read a book, though most said they don't take any special measures to fall asleep.

For the record, 22% of sportsmen take a daily siesta, while 23% usually do on weekends. Much more than the national average, which is 16.2% and 3.2% respectively.



The Netherlands

A difficult year 2009

The Dutch economy strongly depends on the export of goods and services. Exports dropped as international trade was hit as a result of the worldwide credit crisis. Total exports of goods and services decreased by 8% in 2009. Despite the measures taken by the government the Dutch economy diminished by 4% and unemployment rose to 5%.

This recession led to a collapse of the consumer confidence and consumer spending. Sales of houses, cars and furniture dropped in no time. Sales of mattresses decreased too and the turnover of the bedding producers was reduced by 8.5% on average. Volume, however, decrease even more, i.e. by 9.5%.

First quarter 2010

The economic decrease turned into a slight growth of 0.3% in the 1st quarter of 2010. Although this slight increase is often seen as a first step towards economic recovery, some comments are necessary. Economy was stimulated worldwide in the first quarter which led to an increase of Dutch exports. The global measures, however, did not lead to a durable recovery. The industry and the consumer need

to take over from the government, and so far this has not been the case; this is clearly shown in the huge decrease of investments in durable goods and the increase of savings in The Netherlands. The mattress industry, however, has had a small growth compared to the bad 1st quarter of 2009; turnover increased by 6%.

Second quarter 2010

A lot of governmental measures were stopped in the second quarter and moreover, the discussions on retrenchment during the forming of a new governments have had a strong negative effect. A clear example hereof can be found in the housing market: the subsidy for starters on the housing market has been stopped and the discussion on the continuation of a tax advantage for house owners leads to uncertainty amongst potential buyers. Houses remain a lot longer on the market and the prices strongly decrease.

A bad housing market is fatal for the consumer confidence and the willingness to buy. Consumer confidence has dropped even more in the 2nd quarter of 2010. The increase of the savings balance has reached the second gear, which has had a negative effect on shop sales. Sales in the furniture retail have decreased by 5% in the 2nd quarter compared to last year. Although figures are not yet available,

forecast for mattress sales looks bad. Mattress producers say they fear a hard blow in the 2nd quarter.

Outlook

An economic growth of 1.25% is forecasted for next year, but this prophecy is surrounded by lots of uncertainties. Uncertainties with which the consumer is confronted every day: debts, retrenchment, bad housing market. When a consumer is uncertain, he will surely not buy durable goods such as mattresses. It looks as if we face hard times.



See you all again at EBIA's General Assembly in 2011

EBIA is pleased to announce that after two consecutive meetings in the northerly regions, the Board took the decision to convincingly turn the arrows southbound and select as the next venue the exotic and fascinating town of Marrakesh, one of the four royal cities of the kingdom Morocco and alluding to the notion "Land of God" in the Berber language. EBIA will do its best on this one, so... come in large numbers and *Ahlan wa sahlan/Amrehba sisswène, i.e. welcome!*

