

# EBIA

european bedding industries' association

# NewsMagazine



## Foreword by the President : Exciting Times

*The European economic crisis has perhaps ceased making headlines. Yet it grinds on, bringing sluggish growth, unemployment and falling incomes to much of the Union – with little prospect of short-term relief.*

*In the beginning of the year the European Central Bank shaved again the forecast for the euro-zone economy this year, following disappointing indicators and data, that have pushed the prospect of a turn-around in troubled regions back toward mid 2014 in a most optimistic view.*

*Recently there was a bit more positive news, since in July the Economic sentiment indicator in the euro area increased by 1.2 points to 92.5 and by 2.4 points to 95.0 in the EU, continuing the upward trend observed since May. But despite some of these more optimistic messages, demand expectations in some business sectors and countries further deteriorated.*

*I'm afraid that today's mix of urgency, the ever increasing rate of change, and an overall uncertainty will continue as the norm, even after the recession ends. Economies cannot erect a firewall against intensifying global and local competition, lack of consumer confidence, new technologies that are challenging existing business models or any other form of instability. The immediate crisis – which we will get through in the end – merely sets the stage for a*

*The danger in the current economic situation is that we, as business leaders, may tend to hunker down. That we will try to solve the problem with short-term fixes, such as tightened controls, across-the-board cuts, restructuring plans and over-reacting price cuts. That we will default to what we know how to do in order to reduce frustrations and quell our own and others' fears. To draw on familiar expertise to help our organizations weather the storm.*

*In a world where we have more freedom and have 24 hours per day mobile access to the global market, it is simply unwise to still act according to yesterday's recipes. As Peter Drucker, perhaps the biggest business guru ever, expressed it : "The greatest danger in times of turbulence, is not the turbulence, but it is to act with yesterday's logic".*



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*The reality of today is moving to a more creative society, whereby product development and innovation is no longer the privilege nor exclusive domain for the company or the brand, but where consumers become truly co-creators.*

*The anarchy of the internet generates new ways of market behaviour and attitudes towards companies and brands, creating opportunities for new business models.*

*We are moving to new value chains, whereby intermediates without added value have no more right to exist or whereby manufacturers are vertically integrating by opening their own stores – a phenomenon that is currently spreading in a lot of business sectors.*

*A less rational consumer and the explosion of unlimited technological solutions and applications give us the opportunity to set up real emotional connections with our customers.*

*The internet has offered numerous possibilities for post-purchase communications. Consumers are now spreading the word, they have simply become the new media.*

*Finally target groups – as we have always known them in marketing – are more than ever before, a thing of the past because people's individual behaviour is expressed in a most fragmented way. We are all living multiple ways.*

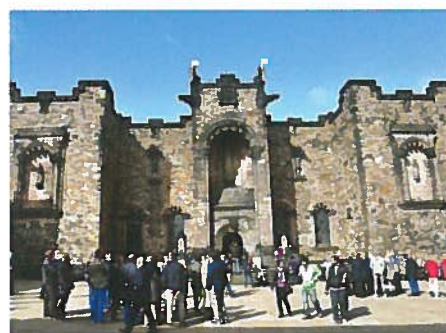
*We are experiencing very difficult times, with a lot of uncertainty and more questions on our mind than ever before. But at the same time we realise that there have never been so many exciting opportunities still untapped today. As Charles Darwin taught us, it is not the strongest of the species that survives, nor the most intelligent, but the one most responsive to change.*

*With so many challenges ahead and so many opportunities waiting to be exploited, these must be very exciting times for the real entrepreneurs amongst us. Let us assume our responsibilities for our own sake and that of our industry.*

Frank Verschuere  
EBIA President

# European Bedding Industry in Edinburgh : 13<sup>th</sup> General Assembly

**The inviting historic city of Edinburgh was a welcoming host for the numerous participants and EBIA invitees at their annual September reunion. Together with the comfortable and characteristic accommodation at the renowned George Hotel and the exceptionally nice weather that accompanied the social programme, the chosen location provided a memorable stay for the international EBIA family & proved to be a fortunate choice for the event organizers.**



In his opening speech EBIA President Frank Verschuere stressed that the generally gloomy economic forecast should by no means be a reason for discouragement in the ranks of the European bedding industry. What we need is daily inspiration to face with enthusiasm and conviction the challenges that many see as impossible to beat. 'Invest in enhancing consumer awareness and focus on the message that good quality bedding is an absolute prerequisite to a good night's rest', underlined F. Verschuere. Creating real value innovation, being more creative in re-thinking business boundaries, finding new applications that respond better to customers' expectations, creating new in-store experiences and exploring new tools of communication – these are areas where major challenges lie. It is imperative to promptly turn customer relationships into real partnerships and profit from untapped opportunities & trends that are favourable to the bedding business.

F Verschuere concluded his intervention in wishing all present an excellent meeting, as well as courage, drive and vision in finding ways to improve their businesses in future in order to be ready for whenever the next economic upturn comes.

## Guest speaker presentations

- The Seven Year Hitch and Why We Need to Talk about Sleep, by Simon Spinks, President of the National Bed Federation
- Position Your Products to Increase Sales and Loyalty Among the #1



Consumer – Women!, by Delia Passi, Medelia.com and WomenCertified.com

- Sleep and Performance : Influence of Bed Quality on Recovery, by François Duforez, European Sleep Centre
- Competition Law Refresher, by Filip Tuytschaever, Contrast European & Business Law
- Four Big Changes - What They Mean for Your Customers ... and You, by William Higham, Next Big Thing

### Gala Dinner & the EBIA Award

The magnificently decorated ballroom of the George Hotel was the setting for a wonderful evening, accompanied by a menu of local specialties and a refreshing musical intermezzo by a famous Scottish bagpiper.

In the course of the dinner, the 2012 EBIA Award was attributed to Dr François Duforez, a prominent sleep researcher from the famous European Sleep Center (ESC) in Paris. With the Award EBIA wants to underscore Dr Duforez's tireless efforts to sensitize

the consumer about the multiple inherent benefits of good sleep and its inseparable relation with quality bedding.

### Closure of the two-day meeting and press conference

In closing EBIA's 13<sup>th</sup> Annual Meeting, F Verschuere thanked the many delegates for their continuous support to our association and their much valued presence on all past occasions. The President also thanked EBIA's team for a good job done during the past year and the professional organization of this year's reunion. He warmly invited all EBIA members to reunite again in the beautiful city of Budapest in September 2013 – at the one and only annual forum of the European bedding industry.

Before the joint Friday lunch and subsequent tourist excursion, EBIA's President and Secretary General held a conference with a panel of se-

lect international journalists to shed additional light on specific topics of interest for the European press.

### Companions' Programme

The companions paid a visit to the Palace of Holyroodhouse and the Royal Yacht Britannia.

### Friday afternoon excursion

EBIA's 2-day programme ended with a visit to Edinburgh Castle dominating the city whereas the Whiskey Heritage Centre proved to be a sensational journey for all participants.





# Budapest – a Love for Life

Straddling the Danube River, with the Buda hills to the west and the Great Plain to the east, Budapest is a gem of a city.

The beauty of Budapest is not all God-given; man has played a role in shaping this pretty face too. Architecturally, the city is a treasure, with enough baroque, neoclassical eclectic and art nouveau buildings to satisfy anyone's appetite. Overall, though, Budapest has a fin-de-siècle feel to it, for it was then, during the capital's 'golden age', that most of what you see today was built. And after a turbulent and often tragic past, the city is nowadays again buzzing with energy and its youthful vibrations carry across the river and monumental bridges. There is joy, as much-loved concert halls get built and renovated, metro lines extended and busy streets pedestrianised.

There is a lot more to Hungarian food than goulash and it remains one of the most sophisticated styles of cooking in Europe. Magyars even go as far as to say that there are three essential world cuisines: French, Chinese and their own. That may be a bit of an exaggeration, but Budapest's reputation as a food capital dates largely from the 19<sup>th</sup> and first half of the 20<sup>th</sup> centuries and, despite a fallow period during a few unfortunate decades, is once again commanding attention. Together with the world-renowned wines from Villány and Tokaj, a genuine gastronomic journey best accompanied by unique Hungarian gipsy music bands. Enjoy the city & its flavours!



## Kathleen McGrath, Winner of the 2013 EBIA Award

Being a prominent and widely respected nurse in the sleep field, Kathleen McGrath founded in 1986 the Medical Advisory Service (MAS), a nurse-run telephone information charity specialising in providing information and advice on the retraining and working with nurses invalidated out of the National Health Service (NHS). MAS has provided an insomnia helpline, Sleep Matters, for well over 20 years now, providing an essential lifeline to insomniacs throughout the UK. As a media & communications advisor she also uses her broad clinical and medical Communications experience to write and

broadcast on medical and sleep matters for several media (TV, Radio, consumer print media, ...). For the Sleep Council, Kathleen wrote the information leaflet, The Good-Night Guide for Children, published in 2009 and in 2012 helped to develop the interactive website, [www.perfectsleepenvironment.org.uk](http://www.perfectsleepenvironment.org.uk).

With this award, EBIA recognizes Kathleen McGrath's tireless dedication to sleep quality and her bridge-building efforts with the bedding industry.



# Activities

## Business & Technical matters

A brief summary of some of the actual topics.

### End-of-Life of Mattresses

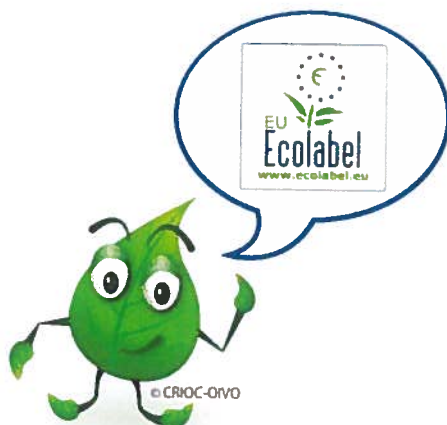
The research study on mattress recycling, commissioned by EBIA's Board, has meanwhile been finalized by the consultant in charge. It is a comprehensive facts & figures report focusing on all salient aspects of the post-consumer mattress problematic, the context in which the matter is unfolding at EU level and existing options for mattress manufacturers.

The study's main conclusions & recommendations – legislative implications, impact of materials used in the production process, technology selection, communication towards national & EU regulatory bodies, markets for recycled/recovered products, long term development projects etc. – will be presented to EBIA members at the upcoming General

Assembly in Budapest. The study will also serve as an up-to-date guideline for EBIA's position statement on this actual issue.

### Eco-label

After a lengthy process that took several years, the revision of EC's Eco label for has now entered its final phase. EBIA's Technical Committee members have in the process provided substantial input to the new contents of this voluntary labelling scheme, geared on the interests of our industry – just in case & to avoid undesired eventualities.



According to the latest info, the new Eco-label should be in force towards the end of the current year.

(For more detailed info, we refer to EBIA's Newsletter n°22 of December 2012, p.2)

### Statistics 2012

EBIA's annual mattresses statistics survey has been completed and the related analysis was presented & commented at the General Assembly in Budapest.

### EBIA Award 2013

EBIA is very pleased that the elaborated selection process has once again resulted in the nomination of the two finalists for this year's award. Many of you have cast their voting ballots for which we thank you.

### Meetings

EBIA's Board of Directors held meetings in Brussels on 29th February and 19th June. The Technical Committee was in reunion on 27th March.

# Country Reports



Despite a budget's reduction in the second half of 2012 and the beginning of 2013, the activities of APL and UFL remained very numerous and still focused on consumers, medical prescribers and press with the same purpose: to make them "thinking bedding" as often as possible.



## Organisation

Gérard Delautre, previously General Director, was elected president by the Board in February.

Unlike previous years, the General Assembly was disconnected from the usual annual meeting "Rencontre" which will be held on 27th September.

The General Assembly took place in June and modified the status of the association in order to improve the parity between manufacturers and distributors in the Board and in terms of financial implication.

## Market

The climate index APL-Ipea, launched 2 years ago, is now operational. It tracks the monthly evolution of bedding sales compared to the previous year. This figure is collected from members of the APL, and also from

outside significant distributors including mail order and web. The increase for bedding 2012/2011 was 2.6% compared to -3% for the furniture market.

## Consumer and prescribers communication

The new "infoliterie.com" site is on line... and proves to be very popular with surfers and journalists.

The Facebook page "I love my bed" created two years ago reached a new record with 143.000 followers; a way to reach a population that is less interest-

ed in the traditional media and make them thinking bedding.

45.000 new versions of the comic strip "Une affaire de tout repos 2" were sent to general practitioners, doctors work, physiotherapists, sports physicians and osteopaths. A lot of them asked for more copies for their waiting rooms. Advertising campaigns focussing on the need to change bedding at least every 10 years have been launched late 2011 and in June 2012. Three new releases as well as several radio messages are (and will again) delivered in "general public" magazines and national radios (France Inter & Europe1).

# Gardez votre literie TROP LONGTEMPS ET vous serez dans de beaux draps

Après 10 ans, vos autres pièces (100) longues heures d'attente.  
Malheureusement, votre literie atom vivra le sejour. Agitez vous qu'elle ne  
s'endorme et ne vous fatigue. changez la pour une literie de qualité sans les 10 ans

La literie c'est pour la nuit, pas pour la vie

RENSEIGNEMENTS SUR LES GRANDES MARQUES DE LITERIE

Pour plus d'infos, rendez vous sur [infoliterie.com](http://infoliterie.com)

## Rappel des conseils pour bien choisir sa literie

infoliterie.com

<p>CHANGEZ DE MATELAS AU MOINS TOUTS LES 10 ANS</p>	<p>ESSEYEZ VOTRE FUTURE LITERIE</p>
<p>PRIVILEGIEZ LE CONFORT</p>	<p>CHANGEZ MATELAS ET DORMIR EN MEILLEUR DRAPE</p>
<p>VOYEZ GRAND!</p>	<p>CHOISISSEZ UNE VRAIE MARQUE DE LITERIE</p>

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**22 MARS 2013**

[www.journeedusommeil.org](http://www.journeedusommeil.org)

As previous years, the "infoliterie.com" stand provided animations with actors and exposed a 2.60 x 2.00 m bed, highlighting the benefits of a large bedding for health... during the 13th "Sleeping Day"

After having won the 2012 EBIA award in Edinburgh, Dr. Francois Duforez (and Professor Damien Léger) continued their cooperation with APL. A clinical study "teenagers and bedding"

is in progress and the first results will be presented in late September.

Dr Duforez and Gérard Delautre are having regular meetings with company doctors of e.g. banks, automotive sector, railways, .... These doctors are very interested in the opportunity to advise their employees to replace medicine by quality bedding for better a health ... and better efficiency for the company!

### Sleep and Performance

The skipper Jean Pierre Dick got success at the "vendee globe" race, finishing third despite losing the keel of his boat.

In a lot of press articles, JP Dick also communicates on the quality of special mattress made for him by APL.

# Country Reports



## Germany

The general situation of the German economy is only slightly positive, but compared to other European countries at least stable. Most of all, the consumer's willingness to buy products as well as the employment rates are seen as an indicator that might be beneficial for economic growth or at least stability in the near future.

Politics and economy have somehow calmed down as elections are foreseen on 22nd September 2013.

What is sad, however, is that the situation of the German mattress market is less encouraging than the general economy. Sales figures are slightly shrinking by - 1 % if you compare the first semester of 2013 with the same period of last year.

Nevertheless the sales in value for the same period look somehow better and could increase despite the lack of sales in numbers by around + 4 %.

Having a closer look at what kind of technologies German customers prefer, we have some surprising news. For the first time since years the acceleration of foam mattress sales cooled down and TFK is coming back in a new shape: boxspring mattresses are a new and interesting product on the German market. The last IMM Cologne fair showed a large variety in boxspring in colours, qualities, prices, versions, etc. What has been presented as a future trend at IMM Cologne has been bought in the first semester of 2013 as sales figures proof.

Latex's share as technology is still shrinking and became somewhat a niche product in Germany.

### Important Topics for the German Mattress Association

- At the latest general assembly, our members cast their votes for a new board consisting of Mr Manfred Greiner (Selecta Matratzen GmbH) as board chairman, Mr Jochen Brinkmann (Fey & Co. GmbH & Co. KG) as vice-chairman, Mr Markus Veutgen (Recticel Schlafkomfort GmbH) and as first female member on our board Mrs Carmen Bühler-Wahl (Akva Waterbeds A/S).

The German technical committee is still led by Mr Winfried Weber (Maco GmbH) and the head of our marketing committee is now Mr Ralf Werner (Badenia Bettcomfort GmbH & Co. KG).

- The IMM Cologne trade fair has meanwhile become an increasing success story. Important players such as Tempur and Schlaraffia committed themselves to come back for 2014, and the fair in Cologne gave us more space. From 13th to 19th January 2014, the mattress industry will present its products and innovations in hall 9 as before and additionally in hall 5.2. The concept will not be changed and as both halls lie very close to each other the presentation will be seen as one, despite being held in two spaces. As agreed upon with all people concerned, this is just a solution for one year and upcoming talks will show what the future brings. As it has become a tradition for trade-fair-Tuesday our big meet@sleep party will start at 6 p.m. (hall 9, booth B040). Everybody in the mattress business is cordially invited to join.

- The German Mattress Association launched an initiative that aims at a solution for mattress recycling in Germany involving all relevant actors. The association therefore invited representatives of different recycling companies

as well as trade associations to develop pro-active ideas during a "round table" prior to European legislation issuing restrictive standards.

In this context, the French recycling model is very instructive and useful for the German mattress market as it shows options as well as possible difficulties.

For the time being, the German association is examining various options by the involvement of recycling experts to co-ordinate the next steps.

Media in Germany are interested in our efforts as well, so we keep on going.

- As a service to its members, the German Association published an information booklet that summarises the main changes resulting from the European Textile Labelling Act, which became applicable on 7 November 2011 and replaces the previous laws of the countries. The transitional regulation states that until 9 November 2014 products may be distributed, which were marketed before May 2012, and are labelled in accordance with the old law. The changes arising from the new act, and particularly the question which parts of mattresses have to be labelled in which form, are highly important for the German mattress manufacturers.







## Italy

The Italian market is bouncing back a little after an important decrease in 2010/2011.

**Recycling:** The Italian Senate approved legislation on 09.05.2012 with specific reference to EoL mattresses imposing recycling and recovery to be further specified by the ministry of environment. The "Conference of the Regions" opposed the legislation recommending to expand the proposal to all bulky waste. So far the Ministry of Environment has not yet issued any proposal.

Representatives of the Italian bedding group and the federation Federlegno-Arredo have met the Senate President of the Environment Commission in charge of the recycling decree and for the time being mattresses are not the priority; if and when mattresses are taken into consideration, the bedding Industry will be called upon and be part of the discussion, given that our point of view is very

much appreciated.

**Fiscal incentive:** According to the Decree nr. 63 issued on 4th of June 2013 the Italian consumers having renewed or restructured their own house, starting from June 2012, and also having bought furniture or furnishing may benefit from a fiscal advantage, which amounts to 50% of the total expense for a maximum of €10.000. Mattresses and beds are obviously included in this decree.

The Italian furnishing federation (Federlegno-Arredo) estimates that this decree will be able to increase consumption for €1.8 billion. As from September onwards the Furnishing and Retailers Federation will launch a common communication campaign via radios, newspapers and magazines ads aiming to push and inform consumers of this opportunity.

**Certification for ignitable products:** the Italian bedding group, by means of the Furnishing Federation (Federlegno-Arredo), will meet with a Delegate of

the Ministry in charge of issuing the authorisation for ignitable products so as to list and find solutions for the main bureaucracy problems mattresses producers have to face. This meeting will most probably be organised in September 2013.

**Italian Sleep Council:** some members of the Italian bedding group will soon launch the new project called "Riposo e Salute" ("Rest and Health") with the purpose of developing sleep culture amongst consumers and make them aware of the benefits a good bedding system and a correct attitude towards the "bedding world" may have on their wellness.

Consequently a brand identity and brand book, a website, a social network set-up, marketing activities, digital and traditional PR and an advertising campaign will be elaborated in the next months.



## United Kingdom

The UK market remains precarious for big ticket items like beds, despite encouraging signs that the country's economy is gradually improving. The NBF's own State of Trade survey for the first four months of 2013 indicates that there is still a climate of caution and there is little overall growth in the market place – although market shares and individual performance may vary considerably.

In August this year, the NBF embarked on gathering sales data from its members for the first six months of the year. It is the first time in a number of

years the NBF has asked its members to provide data – a move which was endorsed by the members themselves at the Annual General Meeting. It is expected that the results of the first set of data will be available by the end of

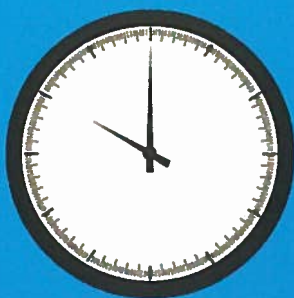
September and over time it should give us a more accurate picture of market size and trends than has been available for some time.

2013 has been another busy year for the Federation, the main focus being

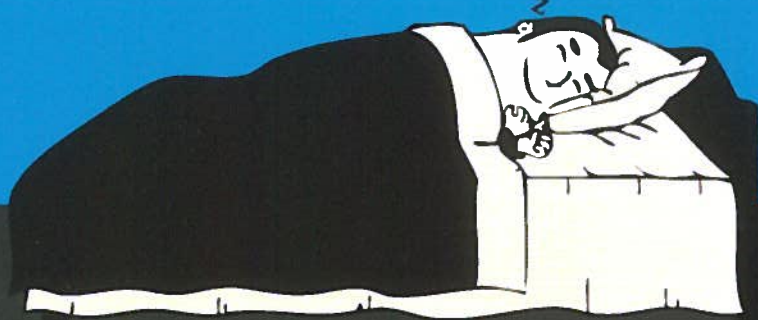


# Country Reports

The **most** popular way to wind down at bedtime is with a **book (41%)** or **watching television (38%)**.



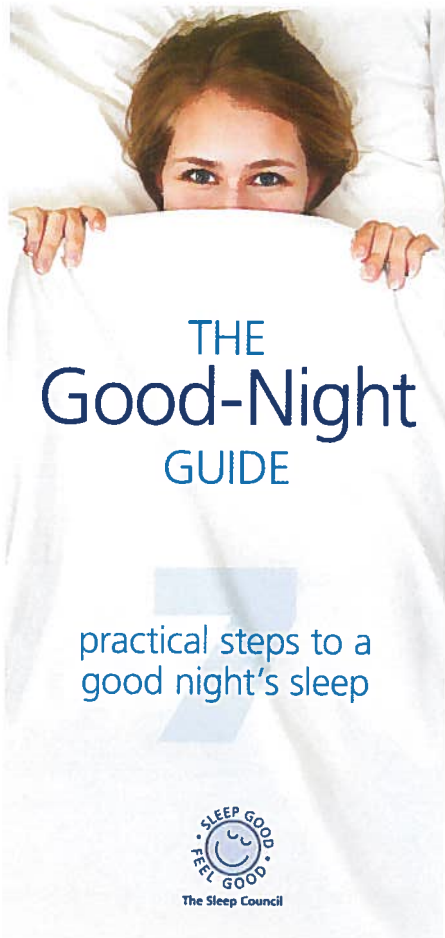
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the introduction of a new mandatory Code of Practice. This was unanimously agreed by members, who wanted some visible means of demonstrating that they were trading honestly. The Code covers three key areas – compliance with flammability regulations, the use of only clean and hygienic materials and product descriptions – is it what it says it is? All members are being rigorously audited by an accredited third party auditor to ensure they meet these criteria - failure to do so will mean expulsion from the Federation - and the Code will be officially launched to the trade at this year's Bed Show in September. Visually it will be identifiable by a brand new membership logo, featuring both a tick and the word 'approved', which members will no doubt wish to use extensively on their own point of sale and marketing materials. A further roll-out to the consumer of the mark will begin with an advertising and PR campaign in the March 2013, linked to the Sleep Council annual event, National Bed Month. Once the Code is up and running, the NBF will feel in a much stronger position to work with regulatory authorities in stamping down hard on those businesses who do not trade honestly or fairly and or obey these legal requirements, thus bringing the industry into disrepute and competing unfairly against those who do try and do things properly.



The Sleep Council continues to push its Seven Year Hitch message, through its PR and social media activities. In March it published the Great British Bed-Time Report – an extensive survey of consumers' bedtime habits and attitudes to sleep and beds. The plan is to repeat this research from time to time to see how attitudes and behaviour change over time. The report received extensive media coverage in national Press, on Radio and TV news. This September the Sleep Council has launched a social media driven campaign called Sleptember to raise awareness of its key messages; while its National Sleep IN Day campaign for the end of October when the clocks go back is focussing on the way consumers now use their bedrooms compared with 10-15 years ago and how they might like the beds of the future to be like.



A brand new booklet, 'The Good-Night Guide' was published earlier in the year – providing more comprehensive advice on how to get a good night's sleep. This is sent out free of charge to individuals and also to doctors' surgeries, osteopaths, physiotherapists, schools, businesses etc. It is widely requested. The Sleep Council's website is now receiving over 40,000 unique visitors a month – up by nearly 40% on last year.

Finally, the Bed Show enters its fourth year with another full house of some 70 members and brands exhibiting; while the Bed Industry Awards are in their third year – last year's winners were: Bed Manufacturer of the Year – ViSpring; Bed Component Supplier of the Year – CPS Group; Multiple Retailer of the Year – Bensons for Beds; Independent Retailer of the Year - Lands of Beds in Cheshire; and Bed E-tailer of the Year – Feather & Black. We await the unveiling of this year's winners with excitement, having received a record number of entries.

New President Stuart Hibbert, managing director of Breasley Consumer Products, was elected at the AGM, taking over from Simons Spinks of Harrison Spinks after the customary two years' service. Says Stuart "I take over the NBF Presidency at an exciting time in its history as its ever increasing number of activities and strategy increasingly demonstrate its relevance and usefulness not just to us, the members but to the bed industry as a whole."



## The Netherlands

The bad economic situation persists in The Netherlands. From a macro-economic point of view, the country has been in a continuous downfall since the beginning of the crisis in 2008. Even though there was a small revival in 2010, there is nothing left in 2011 and 2012.

House construction and house moving are important factors for the market. However, construction of new dwellings has decreased enormously during the last years and also sales of existing houses has gone down. Consumers stay where they are because they fear job losses. There is more than enough money; the savings of the Dutch population

is estimated at 325 milliard euro, but they do not want to spend it till better times come. The consumer confidence index is lower than ever.

The Dutch economy is hardly growing and unemployment is about 8%. In better times, unemployment is circa 4%. The Dutch government does its utmost by saving on all kinds of costs, but economics state that the governments does not take the appropriate measures for increasing the consumer's confidence.

All this has its consequences on the turnover of the furniture sectors and the mattress sector in particular. Sales of mattresses dropped by 8 to 10% in 2011 and 2012; during the first 6 months of 2013, sales has even decreased by 12 to 15%. One of the major Dutch bedding

retailers, Beter Bed, has seen its turnover decrease by 12% during the 1st half of this year.

The Dutch mattress producers fear that they will lose about 10 to 12% for the whole year. Sales of single mattresses is going down whereas the combination mattress-boxspring continues to increase. But, the price pressure is going up. Most of the sales is done when there are special actions!! One gets the impression that the consumer is looking for the cheapest mattresses. There are hardly any changes in the market percentages of the technologies.



## St. Petersburg, here we come!

What a city! Russia's greatest historical and cultural treasure, its 'Northern Capital' – the famous 'Venice of the North' will be the host of EBIA's 15th annual General Assembly on 11th & 12th September 2014.

Virtually unharmed by the 1930-50s period of Stalinist reconstruction, downtown St. Petersburg is crowded with splendid palaces, impressive historical monuments, tree-lined avenues and beautiful bridges. Although not yet 300 years old, St. Petersburg is a magnificent city crammed with historical and cultural treasures and a refined air of mystery.

A warm and sincere welcome to all EBIA affiliates for our annual reunion in this exceptional corner of Europe!

