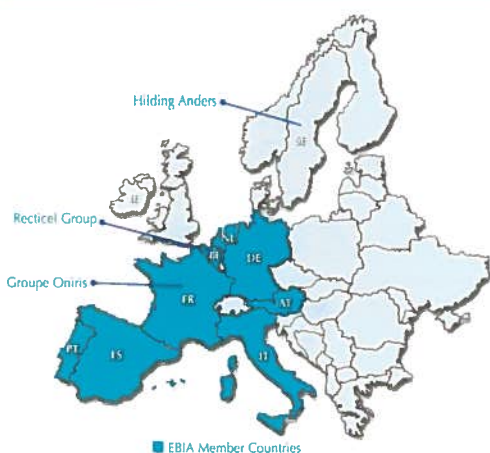


# EBIA

european bedding industries' association

## NewsMagazine



### The Bedding Business is doing OK. It can even get better.

Reports from the national Federations inform us that the European Bedding Business is doing reasonably well in 2007.

The start to the year was in most countries promising and secured a good first quarter.

During the second quarter sales somewhat slowed down. Once again, the excellent weather - as during the month of April - has proven to be the natural enemy of the Furniture and Bedding Business.

So with sales picking up again in June and July, results to date are quite satisfying.

One exception to this overall European picture, was given by France, where Business has been quite booming, especially during the whole of Quarter 1. Was it the presidential elections and the satisfaction (or relief) for its results that boosted this positive market development? That will probably explain part of it. But more likely to me is that the joint effort of manufacturers and retailers through APL has resulted in a solid communication program that is now bearing fruit. It therefore looks almost visionary that EBIA invited APL to share this successful programme and achievements with all of EBIA members at the General Assembly.

Other keynote speakers in Dubrovnik have provided without any doubt additional ammunition to strengthen "the case" of the European bedding industry.

In line with the increasing interest of consumers for ergonomically justified solutions, Prof. Goossens brought clear insights on how the bedding industry could better address this growing need and demand.

In 2006, the Study of Professor Jacobson of Oklahoma State University had already proven that the sleep efficiency and quality significantly improved with new Bedding systems.

Test persons indicated that perceived back pain and stiffness were clearly reduced.

We are glad that the EBIA Board has agreed to participate - together with the colleagues of the US and Canada- in the second phase of Prof. Jacobson's program.

At the annual conference in Dubrovnik the results of the European Consumer Survey that EBIA had assigned to the InSites research agency, were presented. The assessment of consumers' perceptions and expectations towards mattresses and bed-bases has turned out to be quite revealing. It also brought new insights in the buying process.

Through all these initiatives, EBIA continues to strive to support its members in further increasing awareness of consumers, retailers, authorities and all other stakeholders involved, for good quality Bedding Systems.

We realize though that there is still a long way to go, but if we want dreams to come true, the best way to make it happen is to keep working on them, step by step.

Any ideas (and help) for any new initiatives are most welcome.

On behalf of the Board and EBIA management we wish all members an excellent second half of the year and hope that you have been enjoying your stay in Dubrovnik, at the one and only forum of the European Bedding Industry.

Sve najbolje!!!

Frank Verschuere  
EBIA President



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## 7<sup>th</sup> General Assembly in Vienna

Following the successful annual meeting in Amsterdam in 2005, a large number of EBIA members, associated members, companions and guests for already the seventh time in a row again reunited in the beautiful Austrian capital. The interesting and informative programme, which was for this occasion elaborated taking into account the remarks and suggestions of all EBIA affiliates previously consulted by means of a specific questionnaire no doubt contributed to the big attendance – as has also the selection of prominent guest speakers and the attractive social programme.

The reunion was held at the comfortable and conveniently located InterContinental Hotel, which provided excellent meeting facilities and was also the ideal spot for starting the sightseeing tour of Vienna and exploration strolls through the city.

EBIA President Frank Verschuere cordially welcomed all participants and underlined that the large audience is yet again a clear indication of the growing unity within the association, undoubtedly an encouraging sign for the future of our industry in the challenging times it is facing. He thanked the members for their support at various levels during the past year and underpinned the importance of further strengthening the ties and activities in the organization to insure its essential role of being the omnipresent voice of our industry and successful in the multitude of its activities.

In presenting the annual report of the association, the President focused particularly on the initiatives and future vision of the Board, the relations with EU authorities and related industrial federations, the annual supplier councils, EBIA's finances and the programme of the two-day sessions. Markus Veutgen and David Woolfson, chairmen of EBIA's Marketing and Technical committees, presented the technical and business side of the organisation's activities, as well as the consolidated results of the 2005 statistical survey.

### Marketing and Technical sessions

A selected group of guest speakers gave lectures on the following topics:

- Better in Bed: age, pressure, posture and more – Duncan Bain PhD (University College London, UK)
- Expanding Mattress Sales through Research and Consumer Education – Dick Doyle (ISPA, USA)

- The world is changing, what about you? – René Boender (Great Opportunities, The Netherlands)
- Ensuring Fair Competition in a Globalised World – Francisco Pérez-Cañado (European Commission, DG Trade, Belgium)
- Sleeping Systems: Challenges from a Retailer's Perspective – Christian Wimmer (Service & More, Austria)

Two of EBIA's associated members Indurub (Belgium) and Innofa (The Netherlands) gave interesting presentations on their companies' activities.

### Gala dinner & Tourist Programme

The spacious Salon Vier Jahreszeiten & Kautz at the hotel provided the pleasant setting for the traditional Gala Dinner, during which the participants enjoyed an agreeable evening with good food and adapted music.

The nice weather continued also during the sightseeing tour of Vienna on Friday afternoon, further contributing to keeping the participants' spirits high during the visit to Schloss Schönbrunn on the outskirts of the city. In the morning hours, the companions furthermore had the opportunity to visit the famous Spanish Riding School and Lipizzaner Museum.

### Final remarks

Mr Verschuere concluded the annual event in stating that the general content of the meeting and the large attendance (more than 160 guests) were undoubtedly major factors for making the reunion a success and emphasized that all realizations presented in the assembly were possible thanks to the continuing participation of the national association's members. The constructive, open-minded and agreeable atmosphere between all participants clearly demonstrates that EBIA is on the right track and provides its management team with a further stimulus to multiply its creative efforts towards actively and efficiently serving the interests of the European Bedding industry.

EBIA's 8th General Assembly in 2007 will be held in Dubrovnik, Croatia, a real pearl of the Adriatic!

# Activities

During the past year EBIA's management team has intensified its efforts to implement a number of ideas and activity plans which were discussed in the Board. The Marketing and Technical committees reunited in several meetings to propel forward the specific issues that were set down and we are pleased to report that the progress is considerable.

## Business side

The following action points received particular attention.

### • Statistics

The half-yearly compilation and formatting of the figures in EBIA territory, both for mattresses and bed bases, has successfully continued for the second year in a row. The global results for the year 2006 were presented at the General Assembly in Dubrovnik.

### • Research projects

Both the Oklahoma and UK studies have been finalised and have provided most encouraging results for the bedding industry. EBIA prepared a relevant press release, which was also forwarded to all National associations for publication in the local press (see insert in this magazine). The Board has meanwhile put the light on green for EBIA to take part also in the second phase of the Oklahoma University research study, which will be conducted over a period of two years and will mainly focus on the sustainability of the positive results achieved in the original investigation.

### • PR & Communication campaign

An informative EBIA press kit is now ready and will give the opportunity to provide additional visibility to the European Bedding industry and strengthen the image of our association.

### • EBIA Award

As a result of an extensive selection and voting procedure involving several candidates, the winner of the first EBIA Award was officially announced at this year's General Assembly (see p. 4).

### • Sales Manual

This information and instruction guide, destined particularly to assist the retail salesmen in finding additional arguments to successfully promote added value in our products, has been finalised and will be ready for distribution within short.

### • Consumer Survey

In 2002, EBIA for the first time commissioned a study to learn more about the Eu-

ropean consumers' perceptions and expectations towards mattresses. The objective was to clearly identify and define the key characteristics of a good mattress in the average consumer's mind as well as its expected price and life length. Several interesting and unexpected conclusions emerged from this study and the Board considered it was high time to repeat the project and actualise the original findings.

A new methodology was opted for this time, i.e. an online Internet consultation in 8 member countries providing a number of advantages and a sample of 1000 respondents/country.

It is important to underline that for reasons of continuity and compatibility, the original backbone of the questionnaire was kept intact and only slight modifications were carried through, together with some actualised questions.

For a concise summary of the findings, please consult the relevant insert in this magazine.

## Technical aspects

Two salient topics are particularly worth mentioning in this respect, which have received specific attention from EBIA's Technical Committee.

### • Eco-label mattresses

Not unexpectedly, the European Commission last year effectively started with a revision process of the existing Eco-label criteria, the new version scheduled to be ready in 2008. Though the label is presently not compulsory, EBIA's technical experts are actively participating (meetings in Brussels and Paris) in the reunions of the Relevant Working group at EC level, doing their utmost to insure that the interests of our industry are duly taken into account wherever such applies.

### • French Flammability Decree for upholstered furniture and mattresses

After a long period of incertitude, the French authorities officially notified the services of the EC about their intention to implement a new law in France covering the fire safety of upholstered furniture and mattresses, and incorporating the demand for the "cigarette test". EBIA has always opposed this unfounded obligation and went through a lot of efforts together with the affiliated national associations and UNIFA in France to halt this regulation and convince the EU authorities of its redundancy.

An initial success in this regard was the 3 months postponement by the EC of the date of implementation of the said law, but the French authorities have meanwhile somewhat adapted the text of the decree (though not the part concerning the cigarette test) and it is rather doubtful whether the EC will yet again consider to oppose its factual implementation.

## Suppliers Councils

In line with the tradition of the past years, EBIA has organised in June 2006 and 2007 in Brussels meetings with the organisation's associated members for an exchange of ideas and views on actual matters in our sector. These constructive reunions are always well attended and provide a welcome opportunity for inquiries and updates on recent developments, which are of interest to both the industry and its supply chain. EBIA uses the occasion to brief the suppliers on its most recent activities and raise certain points of concern to the industry. On the other hand, the associated members provide interesting information on issues such as imports from 3rd countries, recent market developments, raw material supply situation, innovations and other specific activities. The main objective of the meetings is to enhance the good understanding between all parties and further strengthen the cluster of stakeholders belonging to the same sector, which is no doubt in the interest of all.



**Allow yourself the comfort of a new mattress**

You might need an airbag one day, but you do need a good mattress every single night

It's the only way to start a new day fit and healthy

## National associations, membership & relations with related federations

Each year EBIA makes a point of visiting some of its member federations to give an update of its activities, hold discussions with the many colleagues and friends from the local industry and receive news on the situation on the local market and the respective association's occupation and needs. This year it was the turn to visit ASOCAMA in Spain. EBIA received a warm welcome in Madrid, not in the least by our Board members, and was provided with the opportunity to give a presentation on the present and future goal settings and daily work. The ASOCAMA management presented a succinct overview of the ins and outs of the Spanish market and elucidated the role the association plays in supporting the local Bedding industry and defending its interests.

EBIA also accepted the kind invitation to participate in the General Assembly of NBF in the UK, which was held last May in Oxfordshire. It was a welcome opportunity to present our organisation and its multiple activities, get a better understanding of the situation on the UK market and strengthen the ties with NBF, as well as our colleagues from ISPA also present at the event.

Our association was also present at the Salon du Meuble in Paris, at the IMM and Interzum in Cologne and the Salone Internazionale del Mobile in Milano, using the opportunity to visit our member exhibitors and discuss their needs and expectations.

## EBIA Award 2007 Presented to Prof. Dr. A. Coenen

Prof. A. Coenen of the famous Radboud University in Nijmegen, The Netherlands, was this year's recipient of the first EBIA Award, officially presented to him at the Association's 8<sup>th</sup> General Assembly in Dubrovnik. The jury praised Mr. Coenen for his valuable contribution to improving overall sleep quality and enhancing awareness amongst European consumers of the benefits of new and comfortable bedding.



# EBIA Press Release : Groundbreaking Study confirms Importance of New Mattress

**BRUSSELS, 21st March 2007 - For the first time, an independent and scientific research study performed by Dr. Bert Jacobson of the Oklahoma State University and co-supported by EBIA, confirmed the link between a good mattress and a good night's sleep. The choice of a new mattress can improve up to 63 percent of high back pain complaints.**

Millions of people are affected by lack of sleep, making it one of the most frequent health problems of today's society. The International Day of Sleep – held each year on 21st March – focuses on this too often neglected problem. A deficiency of sleep interferes with daytime activity, social interactions and mood, which can also be associated with loss of work productivity and accidents.

It was generally assumed in the past that a significant number of sleep problems could be related to an old and uncomfortable mattress or sleep surface, without it ever being scientifically proved. The study published in the winter issue of the Journal of Chiropractic Medicine, now establishes the irrefutable link between new mattresses and improvements in back pain, sleep comfort and sleep quality. The purpose of the study was to compare perceived sleep quality before and after replacement of a 5-year old or older personal bedding system with a comparable new and contemporary medium-firm sleep surface. The study concludes that a new mattress provides the required support and has a positive effect in improving back pain and stiffness, thus substantially improving sleep quality and overall comfort. Subjects with high back pain even reported a 63 percent improvement in back discomfort.

The European Bedding Industries' Association (EBIA), a non-profit sector organization, has for some years already underlined the importance of a good and qualitative mattress and bedding system in the sleeping cycle.

EBIA recommends a change of mattress every 7 to 10 years, in the interest of the general well-being and comfort of each individual customer.

"Consumers tend not to realize that mattresses gradually lose comfort and support with use," says EBIA's President Frank Verschuere. "So it is helpful to see proof of evidence that newer mattresses provide improved wellness and sleep benefits."

**About EBIA:** The European Bedding Industries' Association (EBIA) was created in 2000 to represent the interests of the bedding industry, i.e. some 140 companies located in 11 member countries.

The main objective of EBIA is representing an industry producing quality products and coming forward as the permanent voice of the bedding industry.

EBIA, in a constant concern for the wellness and comfort of its clients, is also charged with the promotion of the European Bedding Industry through national and/or international actions.

For more information, please visit [www.europeanbedding.eu](http://www.europeanbedding.eu)

For more information on EBIA, please contact: Mr. Endre VARGA – Secretary General EBIA [info@europeanbedding.eu](mailto:info@europeanbedding.eu)

### Percent Improvement After Four Weeks on New Bedding

(vs. Four Weeks on Old Beds - Baseline)

	High-pain Group	Low-pain group
Low back pain	+63.3%	+47.3%
Spine stiffness	+63.3%	+38.0%
	Poor sleepers	Good sleepers
Sleep quality	+65.8%	+58.1%
Sleep comfort	+77.3%	+64.2%
	High efficiency	Low efficiency
*Sleep efficiency	+4.4%	+30.8%

\* The amount of time in bed actually spent sleeping.

# All arrows point towards... Dubrovnik

This year's General Assembly is being held on the Dubrovnik Riviera, in the charming little port of Cavtat, just a short distance from Dubrovnik town. For those who have decided to extend their stay after the EBIA Meeting, here with some historical and tourist information on this unique port on the Croatian Adriatic. Dubrovnik was founded in the first half of the 7th century by a group of refugees from Epidaurum (today's Cavtat!). They established their settlement on the island and named it Laus. Opposite of that location, at the foot of the Srdj Mountain, Slavs developed their own settlement under the name of Dubrovnik (after "Dub" – a wood specie). The settlements were separated by a channel, which was filled up in the 12th century, presently Placa or Stradun, and since then the two settlements were united. It was at that time that the inhabitants started with the construction of the impressive city wall intended to protect the city from a variety of enemies who wanted to conquer it. The particularity and uniqueness of Dubrovnik is its permanent live connection to its rich past and its cultural heritage, while it keeps vibrantly in pace with contemporary life, echoing its spiritual identity and its presence in the European cultural environment. The most recognizable feature that defines the history of Dubrovnik and gives it its characteristic is undoubtedly the intact city wall, which runs uninterrupted for 1940 m encircling the city. This complex structure, one of the most

beautiful and strongest fort systems in Europe is the main attraction to the city's visitors. Five fortresses, St. Lawrence and Revelin together with Minceta tower, Fort Bokar and St. John's fortress provide the visitors with an unforgettable view of the city. Weddings are held in the small St. Lawrence's chapel or alternatively on Minceta Tower. Performances and concerts are organized on Fort Revelin and St. John's fortress during the famous annual Summer Festival.

The state archives of the Sponza palace with documents from the 12th century onwards attract those who would like to learn more about the past political and economic relations between the Republic of Dubrovnik and its European neighbours. The Franciscan monastery with its museum containing the Old Pharmacy's inventory certainly merits a visit, as does the Dominican monastery with the collection of Dubrovnik's School of Art from the 15th and 16th century. The Cathedral is yet another recommended stop.

Or would you prefer the taste of modern Dubrovnik? Kneeling on the stairs of St. Blaise with a city guide, the discovery of things still unearthed, the taste of a cocktail on a late summer night and dawn on the dew-strewn stones of Stradun...

Whatever you decide to do, EBIA wishes you an unforgettable stay!



## Country Reports



France

### Lots of Activity in the French Bedding Association

The UFL (Union française de la Literie) reunites all major manufacturers and brands of the French market. The members of this association are the groups Cauval (Simmons, Treca and Dunlopillo), COFEL (Literie Bultex, Epéda and Mérinos) and Sapsa Bedding (Sealy and Pirelli). In March, the company André Renault (Group Hilding Anders) joined the association.

At this moment, the member manufacturers represent about 70% of the French bedding market.

In March 2007, the management of UFL was renewed. José-Antonio GONZALEZ,

the general manager of COFEL, was elected president of the association in succession of Patrice BOUGEROL. By means of this article, the members of UFL wish to publicly express their gratitude to Patrice Bougerol for his important work for the bedding industry realised during his mandate.

Four years ago the members of UFL created APL (Association pour la promotion de la literie (Association for the promotion of the bedding industry) with the objective to valorise and promote bedding on the French market. At a later moment, the main distributors on the French market joined APF through FNAEM (French furniture retail association).

Since its creation, APL has organised television campaigns for a broad public so as to make the consumer aware of the utmost importance of sleeping on quality bedding systems.

In 2007, following main actions were realised:

- Communication: creation of 7 new humorous television spots, drawing the attention to the importance of good bedding, which will be broadcasted on the main French television chains during 3 weeks in two periods. The message at the end of the spot says: 'switch to a real bedding brand'.
- Training: creation and distribution of a DVD on the fabrication techniques of bedding for the sales team of the APL distributor's chain. A second DVD on hygiene, comfort and health will be elaborated by end of 2007.
- Public relations: keep the general press informed on UFL's actions and strengthen the website 'www.infoliterie.com' (destined to the general public)

- Health: APL signed a 3-year contract with the sleep centre of Hôtel Dieu (hospital) in Paris. The objective is to realise various studies with this renowned centre to establish the link between quality sleep and bedding.

In June 2007, the Board of directors was renewed: José Antonio Gonzalez (COFEL) was elected president; Wolf Stopfner (Grand Litier) was appointed Secretary and Ezio Braggio (CEO of Sapsa Bedding) Treasurer of the association.

The numerous actions being undertaken by APL have led to the need for a permanent representative. Gérard Delautre, who has over 40 years experience within the bedding sector, was recruited as Director in June 2007.



## Germany

### Focus on Quality

The German market is still very weak and especially latex and springs mattresses are decreasing. Some mattresses are sold at very low prices thus leading to the end consumer having more eyes for the price than for the quality of the product.

The industry therefore has to do its utmost to show mattress traders and customers how important quality is. Our trade fair IMM 2007 was quite a success with a fully booked hall 9 "Sleep" and a fine presentation of products and innovations. At present we are preparing for IMM 2008 and intend to give the retailers some ideas on how to present bedding systems in a more appealing way. We chose the title "P.O.S." as "Point of Sleep" at the point of sale.

Further efforts are being done in the fields of more efficient and positive PR-work, also through the publication of EBIA's press material. First publications in German newspapers have already appeared, but for strategic reasons we concentrate on the time of Cologne Trade Fair.

We are in negotiations with other German industry associations too, to discuss and implement ways of getting more qualified sales personnel in the shops, as it is not our favourite strategy to get mattresses sold by price. Customers should experience different options, qualities and technologies.

Two new associated members have joined: Sanitized, a producer of hygiene products, which will become more and more important in our industry, and Westmont Design, a producer of motors for bedding systems thus contributing to customers' demands for comfortable sleep.



## The Netherlands

### Unpredictable Consumer Behaviour worries Dutch Mattress Manufacturers

2004 and 2005 were two years of unsatisfactory mattress sales, but in 2006 the economic situation became better and the consumer confidence index went up.

In 2007 the industry had a very good start: lots of mattresses were sold and expectations grew more and more that a perfect year was ahead, with a splendid mattress fair in February. It was a bitter disappointment when in the second quarter of 2007 market sales dropped heavily. Sales in the first half year of 2007 ended on the level of the same period in 2006. Expensive high-end mattresses are still doing well as well as low-cost mattresses; mattress sales in the middle price-range are decreasing. Still going strong is the tremendous attention for the so-called Scandinavian way of sleeping. Brands such as Hästens, Jensen, Tempur and some other Dutch brands are doing good business with box springs and thick mattresses. There is also a slight growth in the market of private labels. Some large retailers stopped selling brands and set up new private labels. Some people foresee that this will increasingly become the trend in Holland. Another signal is that the Dutch market is internationalising with new foreign firms coming to The Netherlands.

There has also been an important fluctuation in the market shares of the various types of mattresses in the last 10 years: springs grew from 37% in 1996 to 51% in 2007, PUR went down from 27% in 1996 to 20% in 2007, and also latex decreased from 18% in 1996 to 13% at this moment. The so-called slow-foam or visco-elastic foam is gaining ground on the Dutch market, with a share of 16%; also the sales of box springs are going up - in the carrying systems it has a share of 13% (as compared to 5% in 1996).

The industry is concerned about the consumer's behaviour, as these days it is hardly predictable what a consumer will buy: a cheap product in a certain product range does not necessarily imply the same in another chain. It would be interesting to investigate what triggers a consumer to take a certain decision at a precise moment in time.



## Spain

### Promotion is the buzz word !

Once again ASOCAMA has promoted the annual campaign on consciousness-raising of the necessity to replace sleeping equipment before its 10 years' lifespan, for which a new spot has been shot to be broadcasted on national television chains.

Without giving up the idea of renewal of sleeping equipments, new concepts have been introduced taking advantage of the campaigns' reputation.

On this occasion and with a humoristic note the idea is being conveyed that one should not trust a mattress, which is over 10 years old and the idea of rest is incorporated. The spot ends with the sentence "Asocama revives your sleep".

On the other hand, work has been done to improve the website [www.asocama.es](http://www.asocama.es) in two aspects:

In PDF format, a "Guide for a good rest" has been incorporated as a flyer in order to propagate themes related to the world of mattresses, bases and pillows.

Additionally, the insertion of three little tests allows easy and simple information on the following themes:

Recommended habits

Sleeping equipment and its environment

"Before buying, you should know..."

## Relocation of the EBIA offices

As from 1st July 2007, the EBIA offices have relocated to the heart of the European district of Brussels, with the European Parliament and European Commission as close neighbours. The new offices will henceforth be located at the Rue Montoyer.

The move reflects the importance of a close working relationship with the European institutions.

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For more information please contact the secretariat.

# New European Consumer Survey Finalised

During spring 2007 EBIA has conducted a market research project in cooperation with InSites Consulting on the European consumers' perceptions and expectations towards mattresses and bed bases. InSites Consulting is a market research agency with a strong academic background specializing in online research and operating on a global level thanks to its large-scale proprietary research panel.

8298 respondents from 8 European countries (Austria, Belgium, France, Germany, Italy, Portugal, Spain and The Netherlands) participated in the research project and completed a self-administrated online survey in May 2007. All respondents are between 25 and 60 years old and have main or shared responsibility for the purchase of durables within their household.

Throughout the study all criteria were met to be able to benchmark the current study with a previous market survey conducted on behalf of EBIA in 2002. More particularly a similar sampling profile and questionnaire was used.

The growing importance of health and well being in society is also stipulated in the study, as it outlines that a good health and well-being is driven by a good night's sleep. The majority of the European consumers (approximately 60%) feel they get the right amount of sleep. Still, stress and personal problems are considered to be the main factors disturbing people's sleep. But, 35% of the respondents appoint their mattress or bed base as a reason for sleep disturbance.

European consumers clearly realize that a mattress has an impact on their sleep quality as according to them a good mattress needs to be multi functional: it has to offer a solution for health, sleep and technical issues. More precisely a good mattress has to be good for the back, has to provide a good night's sleep and has to keep its shape. Especially the 'good for the back'-feature has become much more important during the past 5 years.

This perception of mattresses is also translated in the criteria consumers apply when choosing a mattress. Concretely, the most important European choice criteria for a mattress are price (52%), health (41%), the comfort type mattress (39%), and perceived comfort during a lying test in the shop (34%), and the technology of the mattress (32%).

The most popular current mattresses types are spring mattresses (pocket: 20%; other: 26%), followed by latex (21%). Ergo, in 2007 as in 2002, springs were the most popular mattresses. The buying rate of the latex mattresses remained more or less the same. The high-density mattresses have become more popular in

2007, whereas the foam mattresses lost some of their appeal.

Nevertheless, the mattress market is evolving and we notice a higher preference for latex (31%) than the current penetration % of this type of mattress would suggest, which could indicate that the market shares of latex will increase in the coming years. The latter is in line with the fact that a latex mattress is currently assumed to fulfil best the consumer's needs when making his choice.

The '10 years-ideal-life-length-of-mattress'-message has been picked up by the European residents. The majority of the respondents (59%) consider one to ten years as being the ideal lifetime of a good mattress. Especially residents of Germany, Austria and Spain are convinced about this.

Consumers did not only pick up the message but also act upon it, as half of the respondents kept their previous mattress for 6 to 10 years. Still the Italians and the Portuguese tend to do longer with a mattress than other Europeans do. The Spanish and German residents are, on the contrary, least likely to keep their mattress for longer than 10 years. Moreover this is also true for future actions as nearly half of the respondents who have bought a mattress / bedding set plan to replace it within 1 to 5 years, and four out of five within 1 to 10 years.

Finally European consumers mainly replace their mattress for comfort and health reasons. More specifically, the most frequently mentioned reasons for replacing a mattress are the degradation of the filling materials (95%), the shape alteration of the mattress (95%), the overall comfort decrease (95%), a backache when waking up (94%) and a deteriorating comfort on parts of the mattress surface (93%).

The retail experience when purchasing a mattress can be further optimised as the study demonstrated that European consumers have a rather

average retail satisfaction. The shops, which obtained the highest satisfaction rates, are the large multi-specialists (7,8), the independent bedding specialists (7,1) and the independent traditional furniture shops (7,0) – on a scale 1 - 10.

However, it is positive that the main strengths of shops are all features which can be further improved through training: good information supply, high service level, the provision of adequate advice, and the professional capacities of the personnel. Furthermore, shops can differentiate themselves by focusing on an attractive shopping environment and providing an agreeable shopping experience.

Finally, bedding specialist stores (both independent as chains) have to invest in attracting consumers to their shop. According to 60% of European residents, the bedding specialists' shops are best adapted to offer a mattress with a good price-quality ratio, although only 40% actually bought their last mattress at a bedding specialist. Consequently we can conclude that while the image of these bedding specialists is good, there is yet room for improvement as regards penetration.

Contrary to the study in 2002 there are no indications that there is a big difference between the real market and psychological price of mattresses. Europeans perceive a price between € 553 and € 643 as normal for a double mattress, and this is in line with the price they paid for their current mattress.

More than half of the consumers are willing to pay more for a mattress when switching. More precisely approximately 50% of the European residents are willing to spend at least 30% more on a new mattress compared to the price of their old one.

According to European consumers the optimal warranty period for a mattress is 2-10 years, which is in line with the perceived ideal life length of a mattress.



## EBIA's Board Members

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- Anton Cramer & Co** - www.anton-cramer.de
- Artilat** - www.artilat.be
- Bekaert Mattress Ticking** - www.bekaerttextiles.com
- Bodet & Horst** - www.bodet-horst.de
- British Vita** - www.britishvita.com  
www.drakainterfoam.com - www.radiumfoam.nl
- Crespi** - www.mcrespi.com
- Deslee Textiles** - www.deslee.be
- Enbasa-Laval** - www.enbasa.com
- Enkev** - www.enkev.com
- Foam Partner** - www.foampartner.com
- GSG Europe** - www.globalsystemsgroup.com
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- Latexco** - www.latexco.com
- Leggett & Platt** - www.leggett.com - www.lpeurope.com  
www.beddingcomponents.com
- Maes Mattress Ticking** - www.mmt.be
- Mattes & Ammann** - www.mattesammann.de
- New Wind** - www.new-wind.it
- Olmo** - www.olmo-group.com
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