

page 3

GENUINELY BETTER PRODUCTS

Over the last few years industry often gave the appearance of being more driven by marketing considerations than the market. It used to be different: the technicians and engineers had the last word before the marketing and sales people went to work. That was not such a bad arrangement because it resulted in technically superior products that really justified their existence. But marketing specialists brought this arrangement to a temporary stop by going out to identify 'requirements': what did the customer want; today, tomorrow, or next year? Sometimes the answers to the question about 'next year' resulted in over-engineered products. Naturally, any company has to look forward and think about possible answers to future questions; but this must not result in answers that go off at a tangent and treat the customer like a child; because then, the products are just as far from the customer's wishes as their 'technical' predecessors.

KEEP IT SIMPLE

In a recent discussion with the editor, Claus Sagel said: "Sometimes the user simply wants to open and close a drawer." In plain language: 'Simpler products are often better'. Of late, one could be forgiven for gaining the impression that virtually every kitchen system should be motorised, and this is the direction to achieve (as yet) unsatisfied requirements. But is that really so? Although many such systems have been developed by leading kitchen industry names – and without doubt have their advantages – of late the sceptics have become louder. For example Bulthaup has decided not to electrify its kitchen cabinets; head of marketing Hartmut Roehrig: "I am very sceptical about the trend towards more electrical systems in kitchens. Many are mere pseudo-innovations offering no genuine improvement in utility. Neither the retailers nor consumers are screaming out for electronics. As we see it, the

demand for electrification is coming from the hardware manufacturers, not the market."

Of course it is to be expected that other manufacturers such as Poggenpohl, Allmilmö, Miele and so forth will demur. But in 2010 there will be much more attention paid to the question of what a product adds to customer utility; including simple installation and operation. The providers of such systems will be numbered among the winners.

TOP LEVEL ACCESS

There remain plenty of ergonomic problems to be solved in the kitchen, one of which is convenient access to high-mounted wall cupboards. The problem is not so much the opening and closing mechanism for the door or flap. That has been solved. Rather, that the cupboard contents are often out of reach for the average user. Wolfgang Steib is head of sales and marketing for Hettich: "Somehow or other, we must arrange for the cupboard contents to move towards the person, rather than the other way round. We need an answer that is technically intelligent and ergonomically acceptable; that is a challenge for the future."

WOOD GOOD, BUT WHO CARES?

Designers, manufacturers, décor printers and surface materials specialists all rack their brains in an effort to come up with products that are more 'comprehensive', 'all-embracing' or 'integrated' than those of the competition. But the penny has at last dropped, that consumers do not care one way or the other what wood variety was chosen as the pattern or inspiration for the décor. Who cares? It just has to look good! So this year will see a stronger trend to a more skilful blend of colour, structure and décor pattern. It is more important for the décor printer to demonstrate creativity, than to promulgate the 297th type of beech.

page 8-11

Forecast for 2010: GENERAL OPTIMISM

Last year's international economic crisis also hit suppliers of materials and components to the furniture industry with merciless force. So, after these difficult months, how do big manufacturers see the business outlook? Möbelfertigung asked, "What will happen in 2010?"

HUBERT SCHWARZ,

Blum, Chief Executive, Germany

We are not prepared to engage in speculation; rather, we will stick to our chosen path of investment and product development even in times of economic difficulty. We are confident our customers will recognise the advantages and interesting solutions provided by our wide range of products. For example our 'Tandembox intivo' pull-out system gives our customers the ability to differentiate the interior look of their products from those of the competition. This year, the 'Clip top' with integral 'Blumotion' dampening action has been very well received by customers; also, we will continue to provide a range of additional options.

The Aventos range of flap lift-fittings is to be offered with an electric servo-drive; this will give us a distinct marketing advantage both in terms of contents access and customer convenience. We believe there will be increasing electrification of kitchen furniture functions and advances in kitchen furniture hardware. From the interest expressed in the Aventos Servo Drive, we believe purchasers see it as a welcome improvement.

ULRICH BÜHLER,

Egger, Head of Sales and Marketing

Only now are we beginning to get a clear view of the damage done to the kitchen industry by the recent economic crisis. What we are now witnessing – and particularly in Germany – is a reduction in excess capacity and the effects of consolidation through the entire added value chain. However, we believe the worst is now over and that markets will begin to

stabilise at a new lower level. Overall, we take a more modest yet generally confident view of the future. We have done our homework and the company is in a good strategic position with an optimum cost structure. Our Brilon sawmill provides us with the necessary raw materials on-site and is an important strategic step in terms of back-integration. Thanks to the substantial investment made in both new and existing factories, our production facilities are of the very latest standard. As far as we are concerned 'durability' is much more than a mere headline; rather it is part of our everyday company philosophy – extending from environmental product declarations, through the biomass treatment plant to our award-winning energy and environmental project in St. Johann. Thanks to our programme of permanent product renewal and further development we are always in the position to offer attractive solutions. Our customers see us as a reliable long-term partner.

UWE KAHMANN,

Grecon, Chief Executive,

It is virtually impossible to give an economic forecast for this year with any degree of certainty, but Grecon nevertheless looks forward to the future with confidence. Many of our German and international customers say they can see an improvement in sales on the way, which will in turn bring about an increase in demand for our goods and services.

In addition, we used the last few months to make some safety-related improvements to our spark suppression systems, and in particular also to some of our technical measuring systems. Customers can achieve very high board quality combined with optimum use of material and energy. In addition to evaluating and regulating parameters such as raw density, thickness, moisture, adhesive quality and specific weight, we can now calculate them on the basis of a comprehensive customer-specific potential analysis. With Grecon technology our customers can

look forward to a good year in 2010.

JÜRGEN KÖPPEL,
Homag Group AG,
Head of Sales and Distribution

The existing trend towards increasingly individual furniture design will be maintained in 2010. The wide range of different types of surface material, mean that a customer can create furniture to his or her individual taste. Taken in conjunction with the manufacturer's essential requirement for efficient and profitable production in perfect quality, this creates yet another challenge for manufacturers of woodworking machinery.

Homag now has a range of machinery suitable for flexible production of one-off furniture. The production process now places virtually no limits on the designer's creativity. Efficient manufacture is achieved with a combination of finely tuned logistics, the minimum number of interfaces and intelligent process control technology.

The development of new production machinery ensures stability and even better quality of the end product. When it comes to precision-finish high-quality edging, the patented Homag 'laser-Tec' process has advanced to a new dimension of seamless appearance. Because a reduction in weight now plays a big part in take-home furniture, Homag has developed innovative solutions for lightweight panels and extremely thin boards. The push for more individuality and the realisation of unusual designs is now a clear trend in craft products, for which the Homag Group has the necessary answers.

Both the Holz-Handwerk trade fair in Nuremberg and Xylexpo in Milan will set new trends and we will see first indications of a recovery in orders for woodworking machinery. However, it will certainly take quite a bit longer for the North American market to begin recovery from the crisis, though we think it has now reached the bottom. In Asia, there was a severe initial drop at the

beginning of 2009, but since then it recovered quickly to its previous strength. Sales to Eastern Europe are still depressed by the lack of credit, but here too we see the beginning of recovery.

Without a doubt, 2010 will be a year of light and shade, but the good news will outweigh the bad.

SIBYLLE THIERER,
Häfele, Chief Executive

This year will not be easier for Häfele than last. Nevertheless, we look forward to the future with optimism. The Häfele Group is now well positioned; during the crisis our company put a lot of investment into logistics and the service side, as well as extending the range of products.

Our acquisition of Huwil's sliding door hardware and flap-hinges is but one example of how Häfele saw the economic crisis as an opportunity for long-term growth. At the same time we developed a range of new hardware products for display at ZOW. We believe this will be good for business.

We provide a strong and flexible element to new business partnerships, backed by steadily growing engineering and service skills.

We have a comprehensive range of individual services for industry. Häfele engineers ensure that our hardware technology provides an optimum and integral match to our partners' production processes. This has resulted in long-term business relationships that will surely survive a temporary economic crisis.

DR. CHRISTIAN ROLFS,
2D Holding, Süddekor,
Chief Executive

The most recent development in our business gives us cause for optimism that 2010 will turn out to be a better year than 2009. Last year we made a major investment in laser-gravure for

Süddekor Art and the integration of WKP, so we are now ideally set up to meet the next round of tasks and challenges.

The signs point to 'optimistic', and that is our tack for the New Year. The first milestone will be at ZOW in February, when we present our latest round of new products and trends for 2010. We are firmly of the opinion that our technical innovation and core skills in design will give results; we also believe there will be movement in the decorative surface business. We should not expect miracles, but expect moderate growth in 2010.

HOLGER DZEIA,
Interprint, Chief Executive

In the last quarter of 2009 we noticed an increase in incoming orders, but it remains to be seen whether this development can be sustained. Given the relatively low level of profits in our industry, I believe we can expect further consolidation in the market. Naturally, we have great hopes from the major fairs held at the beginning of this year – the International Cologne Furniture Fair, Domotex and ZOW.

As far as 2010 and Germany are concerned, we expect consumer demand to remain steady, so there will be no great stimulus to the sale of our products. Nevertheless, we think that overall the Western European market will begin a slow recovery as compared with last year. We believe the worst is now over in Southern European countries such as Italy and Spain.

However, the North American market remains difficult – it will probably recover only slowly and at a low level.

The main drivers for new business are coming from Eastern Europe and the Asian markets. Likewise, South America is coming along quite nicely. There are also grounds for optimism in the Middle East.

Coming now to the various product segments, in many countries the market for laminar floor coverings has now reached saturation point, particularly in Western Europe. In the furniture industry we hope for some recovery, though the office furniture

industry still has some difficult months ahead – at least until growth in the general economy gives some solid grounds for optimism.

ANDREAS ALBIG,
Rehau, Head of Furniture Business

Business improved in the second half of 2009 as compared with the first, but it remains to be seen whether this will lead to a long-term recovery following the dip in optimism in the kitchen furniture office furniture sectors.

We at Rehau nevertheless face the future with optimism, and the ZOW trade fair with excitement. There we will once again have numerous highly expressive new surface materials, modern process technologies and functional systems solutions.

page 12-15
Hettich: INNOVATIONS NOW
EVEN MORE IMPORTANT

möbelfertigung: Herr Steib, You joined the Hettich senior management about one year ago. Was it a major step from the position of being a kitchen manufacturer, to that of a supplier to kitchen manufacturers?

Wolfgang Steib: Not quite so big as I had previously thought, because there are many crossover points, the most important of which is functionality. In this respect, kitchen manufacturers and their suppliers think very much alike. But in any case, we in Hettich operate very much like a furniture manufacturer. We have to try and think like our customers in order to understand their current requirements; also, we must look forward to identify future requirements that may well arise but are not yet on the furniture manufacturer's horizon.

möbelfertigung: What were the main new challenges for you?

Wolfgang Steib: The first task for me was to get to grips with the complex structures in what is a fairly large company. For example, last year I made 21 foreign trips simply jet to familiarise myself with the organisation and to learn at first hand about the differences

that exist between the markets, and to find out what makes for success in each. I suppose you could say that this was my first-year apprenticeship with Hettich.

möbelfertigung: So what is your personal conclusion at the end of this first year?

Wolfgang Steib: The task before me is very exciting and the potential for the company is enormous. The decision to join Hettich was absolutely correct, and I would do so again without hesitation.

möbelfertigung: Before you joined Hettich you worked in the German kitchen manufacturing industry. How do you now see this branch of industry?

Wolfgang Steib: The position differs from one firm to another. Last year there was a crisis that left its mark on the German furniture industry. Some manufacturers were hit harder than others. In each case it depended very much on the depth of an exporter's involvement in the respective market. For example, exporters who were strongly committed to Spain and the UK were hit much harder than those whose prime market was Germany, which was much more stable.

The key issue is how these export markets are to develop. At present, we see no improvement in Spain and it is possible that the Italian decline may even continue, while Germany may see moderate growth. Sales to the Far East are going very well.

möbelfertigung: Dr. Hettich, how do you now view 2009 in retrospect from the business point of view?

Dr. Andreas Hettich: It was the biggest international economic crisis since the Second World War. Nevertheless, I am quite satisfied overall; our business remained very stable, particularly in the German market.

möbelfertigung: Which markets suffered the most?

Dr. Andreas Hettich: The UK, Spain, Ukraine and Russia. Our

sales in Ukraine dropped more than 50 percent and the recovery in this market remains very slow, while Russia is now on the way back. Similarly, there was a sharp initial decline in our Polish business, but the indications are now quite good.

möbelfertigung: What's the situation in China?

Dr. Andreas Hettich: There was an initial sharp decline, followed by a rapid recovery. Now, you might almost think there had been no crisis. China has decided to invest heavily in housing, and of course this was naturally reflected in demand.

möbelfertigung: Which markets have shown themselves to be most stable?

Dr. Andreas Hettich: As previously mentioned, our business in Germany has been pretty good. I almost had the feeling that the financial crisis was good for furniture demand. On the one hand, pay awards were above average and so there was plenty of money available for consumption. Also, the interest paid on savings was very low. Further, the image of the banks with the general public was at an all-time low, so many savers decided to purchase consumer durables. This of course embraced living room furniture and bedrooms.

möbelfertigung: What was the Hettich response to this difficult economic situation?

Dr. Andreas Hettich: We decided that the right response was to launch new products during the last twelve months.

In this context, I was pleasantly surprised to find that many companies had decided to upgrade their products; for example, shifting from part-travel to full-travel drawers, and from normal to dampened. Of course, this had a positive effect on both turnover and profit. But even so, we had to make a determined response to the difficult international economic situation.

In plain language that meant no more employees on second-

ment from other firms, short-time working and no pay increases. This enabled us to weather the storm without any job cuts.

möbelfertigung: What was the competitive situation with respect to cheap suppliers?

Dr. Andreas Hettich: Our strong suit as a supplier is dependability backed by excellent service, which gives us the edge vis à vis smaller cheap Asian suppliers. However, we had a few customers who were struggling simply to survive and who therefore switched to cheap products.

möbelfertigung: Did you suffer from any shortages on the supply-side?

Dr. Andreas Hettich: Our main suppliers are for raw materials and here there were no shortages. Also, given that market demand was low for raw materials the prices remained moderate.

Taken as a whole it is self-evident that a company like Hettich must have a wide range of suppliers and sources, so we look at them very carefully before taking them on. In times like these we watch very carefully to see whether they can really weather the storm. This relates more to component suppliers rather than raw materials, because the latter are very stable. In this context, we are quite well set up since we can make most components ourselves if push comes to shove.

möbelfertigung: Do you anticipate large price increases in the cost of raw materials in the near future?

Dr. Andreas Hettich: No. Although there are now many economic regeneration programmes for a variety of industries, demand in many sectors such as shipbuilding remains weak. So I conclude there will be no major price increases this year.

möbelfertigung: During the crisis year of 2009 many firms had to switch quickly to short-term production plans. Was Hettich obliged to produce 'for stock' in order to be able to react quickly?

Dr. Andreas Hettich: No, because a reduction in production volume brings with it the advantage that you can be more flexible. In addition, we invested heavily in supply-side capability. For example we took on the storage of components for some of our customers, but this did not result in our warehouse bursting at the seams because we had been investing in additional logistics capacity for some long time.

möbelfertigung: What's your forecast for 2010?

Dr. Andreas Hettich: We anticipate a slight recovery in many markets. However, although there are some positive signs with respect to Germany I fear the employment figures may have a knock-on effect.

Then there is the fact that German housebuilding is now at a historically low level. So the chief demand for new kitchens is for modernisation; and that will only work in a good economic climate. If the unemployment figures were to rise, that would not help our business.

möbelfertigung: How do you see the competitive position of your company?

Dr. Andreas Hettich: We believe we are doing okay. One of our major strengths is our very wide range of products coupled with high design and development skills. We have a range of relatively simple products with which to open up new markets, and subsequently follow up with higher-value systems.

Also, our sales and distribution system is both effective and flexible; we look forward to the future with confidence, both nationally and internationally.

möbelfertigung: In which product sectors do you anticipate the most important innovations?

Dr. Andreas Hettich: The kitchen is and will remain innovation driver number one. For example, motion-dampening systems are now almost de rigueur for drawers and doors. But I would be

very careful in the use of the term 'leap in innovation'. There will never be a 'flying drawer'; rather, we will see previous ideas reborn, developed and up-graded to form part of comprehensive systems. In future, we believe that the interaction between different systems and fittings will play a major part in driving progress.

möbelfertigung: How do you see the likely future electrification of furniture?

Wolfgang Steib: When considering electrification you must always focus on the potential additional utility. You have to ask the question: does electrification really enhance user convenience or utility? It would be wrong for us as a manufacturer to race head-long into increasingly complex technology; as I see it, there are many far more important considerations. I give as an example high-level kitchen cupboards: so far no-one has produced a totally satisfactory design. Now, many people simply cannot reach the contents without some sort of assistance. That is a problem for which we need a solution. But to return to your question about electrification of kitchen furniture, it would require very careful consideration as to whether and how far Hettich should pursue such a course. Driven to its logical conclusion, at some point the product would be more of an electrical item than a kitchen hinge or fitting. That would then raise the issue of redefining our core business.

möbelfertigung: You raised the problem of high-level cupboards. What answer does Hettich have to the problem of cupboard contents that are out of reach to an ordinary user?

Wolfgang Steib: Somehow, the cupboard contents must be brought to the kitchen user. The solution must be technically intelligent and make ergonomic sense; it is a challenge for the future. Essentially, the problem has to be solved by kinematics, which makes it a task for a manufacturer of hinges and fittings such as Hettich.

Dr. Andreas Hettich: We have a kitchen design 'Küche 2015' with a possible solution: the high-level cupboard is lowered to within reach, but electrically powered.

möbelfertigung: How do you see the question of high-level flap-doors? Some of your competitors seem to be more advanced in this respect.

Dr. Andreas Hettich: In my view, in future not all high-level cabinets will be fitted with flap-doors. I see this as being an issue primarily of design. Of course, high-level cabinets predefine a group of fittings and hinges; but although we have a very wide range of products we cannot manufacture everything, nor do we wish to do so. Nor does Hettich manufacture corner cupboards or pharmacy-style larder drawer cabinets.

möbelfertigung: Even so, some of your worthy competitors seem to be making good money with such products. Don't you fear losing market share that would be hard to regain?

Dr. Andreas Hettich: I am not at all sure that this product sector is really as profitable as you suggest. Certainly, there are different opinions on that. However, as I just said, we cannot cover every possible product and there will always be areas in which our competitors are present and we are not.

möbelfertigung: How do you see the acquisition of Huwil by Häfele and Kesseböhmer?

Dr. Andreas Hettich: The acquisition of Huwil by Kesseböhmer came as no surprise. Their products are highly complementary and Kesseböhmer can now extend its range of flap hinge systems.

möbelfertigung: So if Hettich is not investing money in the development of flap hinges and fittings: in what areas are you working on new products?

Dr. Andreas Hettich: Of course we are investing heavily in research and development, but our objectives are far in the future. Our company is a participant in

the 'Open Invitations' network, in which firms from different industries join together to envisage how homes and workplaces might be in the future. Of course, there are always many answers; never a single one.

For example, an architect would approach the problem by dividing a dwelling into two zones, the 'public' and 'private'. The public zone incorporates the kitchen living room and dining room, though there is now a strong trend towards merging these three into one. The private zone is that of the bedroom and bathroom, where again there is an increasing trend to a merger. The bottom line is that we see the creation of new types of furniture, which in turn have an influence upon the design of hinges and fittings. This is where we will see the interaction between different systems and fittings mentioned earlier.

möbelfertigung: How do you see the future of lightweight construction?

Wolfgang Steib: There is no doubt that lightweight materials are on their way in; the only question is: when? The answer is closely dependent upon the costs of chipboard and energy. The environmental aspects are a further important consideration; and recycling is now of increasing importance. At some point furniture manufacturers – just like the automobile industry now – will be obliged to take back their products for disposal at the end of their service lives. Here, the issue of weight is most important. We are absolutely certain that when lightweight materials are adopted for general use, Hettich will be ready with suitable hardware. In addition, Hettich is already working on all the problems together with specialist machinery manufacturers.

möbelfertigung: At present there are many different types of lightweight board. What type do you think will come out on top?

Dr. Andreas Hettich: My personal view is that the honeycomb

panel will win through; of all the materials now available it is the most logical and consistent lightweight board. I think that lightweight composite boards are probably transitional products; they are much more difficult to dispose for recycling and cannot compete with the honeycomb board in terms of weight.

Wolfgang Steib: Another problem is that as yet no generally accepted industrial standards for honeycomb boards or lightweight panels and this discourages potential users.

Dr. Andreas Hettich: Also, there is a plethora of different board types based on paper, aluminium, composites and much more besides.

It would be an enormous task to identify them all and then draw up a list of specifications with weight and strength, followed by testing. Given this mountain to climb, it is hardly surprising that the furniture industry is hesitant to adopt them for general use.

möbelfertigung: Do you see any potential for savings or economies in Hettich?

Dr. Andreas Hettich: There are no individual large areas that would qualify, but there are many small ones. It is always possible to optimise and improve processes, for example by intermeshing a process with customer requirements; we have gone a long way to achieving such ends in Germany. One example of savings that can be achieved by higher efficiency is that of our 'Office Power Systems', where we have created a range of products covering about 90 percent of requirements and can be delivered within six days. We were able to set this up without increasing our stock levels. Instead, we invested in production flexibility to meet varying levels of demand. That was certainly worthwhile. At present we are looking closely at the subject of electronic billing, though this is a complex subject in law. However, the Government has provided legislation that now makes it possible to send bills electronically.

möbelfertigung: How do ecological considerations rate in your business?

Dr. Andreas Hettich: This is a very important subject area for us. We began to look at recycling back the 1990s; in addition this is very important for our production processes.

As far as I have been able to find out, we are the only hardware manufacturer that is certificated in accordance with EMAS; and we did so because it was worthwhile. Over the last 15 years we have reduced our specific energy consumption – that is the energy required per ton of products – by 30 to 50 percent, depending upon the sector in question. It starts with our buildings. The new Forum is a decisive step in the right direction because this almost functions without any external energy inputs; it gained the national 'Green-Building

Award' as the best new office building in Germany.

There are a host of small future energy savings that can be achieved and our investment in energy efficiency has always paid off much faster than planned. Economic efficiency and ecological considerations always go hand-in-hand.

Last year one of the biggest issues we had to face was the question of possible hazardous impurities in materials, triggered in particular by the Chinese toy scandal. And because we also purchase in China, we took a very close look at these items. Another is our carbon dioxide footprint; in future, we will be able to tell customers how much CO₂ is embodied, for example, in a Quadro pull-out mechanism.

möbelfertigung: Are ecological considerations very important when it comes to marketing?

Wolfgang Steib: Yes, very much so, because it enables us to provide retailers with an additional sales pitch in the showroom. Very often it is this particular question which, when raised, places us on the customer's short list. In many areas, ecological aspects are fundamental to the deal.

We believe that ecological considerations will continue to gain in importance when it comes to marketing. Also, it is helpful in the context of global competition. Frequently, small Asian manufacturers don't get a look-in, simply because they do not have satisfactory ecological credentials.

möbelfertigung: How important is the Hettich Forum for your business?

Wolfgang Steib: Very important, because it enables us to present our company to visitors exactly as we would wish; for us, the Hettich Forum is a quasi 'Permanent-Interzum'. In addition, we make the Forum available for business meetings and conferences, which brings in fresh visitors for whom Hettich products and activities were previously unknown.

For this reason we invite many customers to visit the Forum from Germany and other countries, because it is a good place for us to work together. The Forum has almost the complete product portfolio on show.

Dr. Andreas Hettich: The Hettich-Forum is also of great interest to people who live in the surrounding area for whom we do guided tours from time to time. On the one hand they are naturally interested in a company that is the biggest employer in the region, and on the other in the clever functions that are to be found in modern furniture, particularly to see what can be done in a kitchen. We think it is vital to arouse consumer enthusiasm because the furniture industry competes against new automobiles, travel and communications technology. Consumers have tremendous interest in these new products, and we have to do the same for furniture. We can demonstrate these possibilities in the Hettich Forum.

page 16+17
Porsche Consulting: LEAN FURNITURE MANUFACTURE

Not many years ago a visitor to the Witten factory operated by Völker AG would have been confronted by sawdust everywhere

and materials stacked to the ceiling. The manufacturing operations were divided into discrete workshops with carpentry, painting and final assembly all operating independently of each other. Each operation – sawing, sanding, screw fitting and assembly – took place between separate partitions.

Since then, the manufacturing arrangements within this medium-sized specialist manufacturer of hospital furniture have been transformed into a highly efficient and streamlined production line. Chairman of the board is 68 year-old Heinrich Völker who for more than ten years has been advised by Porsche Consulting: "There is a world of difference between then and now Our industry has changed so much and the competition is tougher than ever." He knows only too well that perpetuation of the old production arrangements would have been the death of the company.

The words 'Porsche and furniture' do not naturally go together like 'tea and coffee'. However, Porsche and the furniture industry already have a long history of association, which is evident from the more recent history of Porsche AG.

At the beginning of the '90s Porsche was in the midst of a full-blooded crisis that called for a radical restructuring with a new approach and ruthless slimming-down. The company succeeded in effecting a turnaround within three years – which was followed by a period of unbroken growth to the present day. Learning from its own successful experience, in August 1994 the sports car manufacturer set up a new subsidiary to pass the word around to other manufacturers faced with similar problems of process optimisation: Porsche Consulting GmbH. Clients beat a path to their door not only from the automobile industry, but also from building construction, consumer goods manufacturers, retailers, banks, health services, housewares and the furniture industry.

The approach taken by Porsche Consulting is to focus

upon the added value chain by redesigning and optimising the individual processes; the formula is to eliminate waste and replace this with added value. However, the message is not always popular.

That was also the initial reaction from some parts of Völker AG; for many in the firm the message of lean production structures and the elimination of buffer stocks sounded very much like job cuts. However, this changed when the Porsche consultants showed how the inefficient operation could be made efficient by installation of a time-cycle circular assembly line operated in conjunction with component supply carts.

Inspired by the lean production principles demonstrated by Porsche, Völker and the Porsche consultants restructured the furniture factory. First the project team analysed all the operations and then replaced the compartmentalised arrangements with a flow-line manufacturing system. They then introduced the principles of just-in-time assembly, which virtually eliminated the need for buffer stocks and with it the storage space.

In the first year of revised operation Völker's productivity increased by 50 percent, liberating capacity and creating the space to accept additional orders. In addition, Völker AG increased the manufacturing depth of its products, so that products previously bought-in are now made in-house.

This in turn created more employment and the growth in business was reinforced by continual improvement and introduction of the 'Völker Improvement Process', which extends into such areas as purchasing, sales, distribution and customer service.

page 18-20
Würth: ALL POWER TO SALES AND DISTRIBUTION!

möbelfertigung: Herr Friedmann, How badly was Würth hit by the world-wide economic crisis? Can you describe the current situation in the main markets?

Robert Friedmann: We are all well aware that this international economic crisis has not just been confined to a very few markets, but extends around the world.

This is particularly true of the USA, whose economy was in trouble before the onset of the current worldwide economic crisis. In Western Europe the main problem areas are the UK and Spain, but the same is true of some Eastern European markets.

möbelfertigung: Are there any markets where growth continues in spite of the current economic difficulties? What are the reasons?

Robert Friedmann: In Germany, our classic core business remains relatively stable – as compared with related industrial sectors and exports; this is due to the relatively healthy situation in the craft sector and our ability to win market share. We have seen a general trend towards more growth over the past few months. Our parent company is Adolf Würth GmbH & Co. KG; in September and October it recorded record turnover.

möbelfertigung: What measures did you adopt to defend your business?

Robert Friedmann: We focused on two major objectives: cost reduction and increased liquidity to strengthen our financial base. At the same time, we put a major emphasis on sales and distribution.

möbelfertigung: Is it easier for a large corporation to respond to changing circumstances than a medium-sized company?

Robert Friedmann: Although we form part of a large corporation, we see ourselves rather as a medium-sized business: some 400 companies make up the Würth Group, each of which has a wide degree of freedom to run the business as it sees fit. This decentralised freedom to operate is very important for us and gives us a number of advantages vis à vis central direction. Each of the 400 businesses around the world has its individual programme of cost reduction and rationalisation.

This means we are able to be flexible on a local basis and respond to problems individually as they arise. Additionally, given that we are a family-owned business, we are not under pressure to achieve short-term gains. Rather, we pursue a long-term strategy.

möbelfertigung: So, how successful were or are you with this approach?

Robert Friedmann: In particular, we were able to initiate our response at an early stage. We concentrated very much on sales and distribution, and that paid off. On top of that, in the good years we were careful to put something by, with the result that our liquidity was in excess of 600 million Euros, and our equity capital is better than 40 percent. In spite of the difficult trading environment we still have an A-Rating from Standard & Poor's. We are now benefiting from that. As soon as international trade starts to pick up, we will be there ready and waiting around the world.

möbelfertigung: Did you have to postpone any new investments?

Robert Friedmann: Yes, of course we have had to keep an eye on costs. For when all is said and done, come the end of a year in which turnover is down, we must still finish up in the black. We will probably finish with an operating profit in excess of 200 million Euros, which will be satisfactory.

However, our cost-reduction programme does not exclude the possibility of additional investment to strengthen sales and distribution. Overall, we have proceeded very carefully and with a targeted approach: for example, Adolf Würth GmbH & Co. KG has hired additional people to work in sales and distribution. Last year the Würth Group invested more than 250 million Euros.

möbelfertigung: When do you believe that markets will start to recover?

Robert Friedmann: Well, so far the experts have been unable to agree on that. But I don't antici-

pate any fundamental improvement before the last quarter of this year, nor do I think that we can anticipate a significant improvement in 2011. Nevertheless, we plan to continue growth.

möbelfertigung: How has Würth responded to the specific requirements of the furniture industry's production processes?

Robert Friedmann: Würth set up a business division specifically to meet the requirements of joinery craft and furniture businesses that incorporate hardware in their products; this division provides modular services such as the complete planning and production of furniture elements via an online platform. This year Würth will be the first company to offer customers a space-planner for a wide range of rooms and indoor areas; visualised and ordered completely from Würth. It will represent an enormous saving in time and cost for our customers in terms of lean production processes and minimum materials stockholdings.

möbelfertigung: How has the furniture hardware business come along within the Group?

Robert Friedmann: The foundation stone for the manufacture of furniture hardware within the Group was set when we acquired Mepla-Werke-Lautenschläger in 1996. Our goal at that time was to achieve independence from the small number of manufacturers that then existed. So it was logical from the strategic point of view to strengthen our business in this sector.

In the medium-term it will only be possible to succeed in the hardware sector by combining innovation and quality leadership. Now with the Grass brand we have achieved the necessary size of business and also have the necessary innovative products.

möbelfertigung: How content are you now with the Grass brand?

Robert Friedmann: The Grass brand is one of the most important in the hardware sector.

Although Grass was his by last year's crisis, we are basically happy with progress to date. This is especially true when it comes to new products – the new generation of 'Timos' hinges with integral dampening; and the new 'Dynapro' sub-frame drawer guide, which we exhibited at Interzum last year. Following the restructuring of hardware production within the Würth Group it was absolutely right to ride against the competition on the strong back of the Grass brand. The single-brand strategy enables us to present a strong and uniform image in all market segments.

möbelfertigung: Do you believe that the very ambitious target turnover figures set for Grass and for Würth's furniture hardware sector can still be achieved?

Robert Friedmann: The Würth Group and thus also Grass plans on a long-term ten to 15-year cycle. Even though we must take the 2009 crisis into account, we will nevertheless continue to pursue these ambitious goals with all our strength and determination. Together, the innovative products from Grass and the superb services provided by Würth now position us to emerge stronger from the crisis and bring our strengths to bear in the market this year.

möbelfertigung: Were you successful in redefining the business boundaries between Grass industrial sales and Würth hardware to the craft sector?

Robert Friedmann: It was relatively straightforward to define the boundaries in the OEM sector; the biggest difficulty was to achieve the same at dealer level. Nevertheless, we have succeeded in establishing sensible arrangements. Within the Würth Group we have always managed to define satisfactory in-house boundaries between sales to industry and those to retail customers; the answer is to do what works. It is Würth Group philosophy to adjust the services as required by the individual customer.

möbelfertigung: Do you not have an uncomfortable dog-eat-dog situation within the Group when both Würth and Grass exhibit on the same stand, or exhibit at trade fairs that are in close succession to each other?

Robert Friedmann: The Grass brand now has a much expanded presence at trade fairs; it enhances brand recognition and extends our reach to non-industrial craft businesses, with clear advantages both to Grass's retail partners and to the Würth sales and distribution network.

möbelfertigung: How can it be that a 'sales and distribution giant' such as Würth can have all its products available in all world markets?

Robert Friedmann: The decentralised structure of the Würth Group delivers the result: each regional subsidiary is set up to serve its own particular market and customers. It has its own logistics set-up, not one following a central master plan. Production decisions are not taken on a central basis, making us 'local' and able to react quickly and dynamically to enquiries. That's how we bring it off: we are a 'sales and distribution giant' which sets worldwide standards, while remaining a partner for our local customers to whom we provide an individual service.

The Interview was conducted by Tino Eggert und Stefan Müller

page 22

Interprint Kitchen Days: CUSTOMERS ARE 'HEROES OF THE HOB'

Just before Christmas Interprint invited kitchen manufacturer customers from all over Europe to witness a combined presentation of kitchen design and cooking skills. The event was led by German celebrity television chef Olaf Baumeister, who invited customers to join him at the kitchen worktop and oven. Together they produced a range of tasty dishes, the most popular of which was undoubtedly 'Last-minute duck'. The kitchen manufacturer

customers also naturally took time to take a good look at the in-house display of the latest Interprint kitchen decors.

The display panels showed a range of top designs for kitchens and dining areas including light-coloured wood decors such as Aviola Cherry – which combines several different cherry tree elements into an exciting composition. Those with an eye for good taste might perhaps prefer Boras Ash, where expressive heartwood sections provide a striking contrast to light, streaked sections.

Maple is another item of interest in kitchen furniture: Yuma Maple is a modern interpretation having elongated whorls contrasting with fine streaks. A light grey tone generates a pleasantly cool freshness in maple colour. Stone decors are ideal on worktops; Pietra Piasentina is a well-tempered balance of natural appearance and inherently cool material. The base material of this natural Italian stone is a crystalline grey with soft, light brown shades intermingled and accented by striking white veins.

The decors were located within a creative surrounding ambience: the Atrium had the 'Feuerstelle' (fireplace) installation and banners with quotations from the Interprint design book. There was a glass table more than four metres long acting as an attention-getter with the embedded Interprint decor 'Oak White Pore All-Over'. This innovative piece of furniture was made in cooperation with glass manufacturer Glas-Trösch.

Visitors were agreed: "It was a great idea to combine the latest in kitchen decors with a cooking demonstration." For all concerned it was a successful mixture of trade talk and an emotional event, particularly in view of the fact that Olaf Baumeister not only invited guests to watch him at work close up, but also talked 'off the record' about his experience of Haute Cuisine; a gain for both the guests and Interprint alike.

page 24

Ballerina: SURPRISINGLY GOOD RESULTS FOR 2009

Companies with classic 'medium-sized' characteristics can only make genuine progress if they have clearly defined products and plans. One excellent example is kitchen specialist furniture manufacturer Ballerina. For many years, their name has been associated with strong innovation, a nose for the next important trend, plus well-organised sales and distribution arrangements. These high standards are reflected in their production arrangements, which are focused on the highly individual requirements for batch quantity size one. Because the company has great manufacturing depth, during the past few years it has invested primarily in prefabrication to provide customers with the greatest possible flexibility. In particular, Ballerina cooperates very closely with machinery specialist IMA.

At present, Ballerina is working on a totally new IT control system. Not only will this result in more efficient production processes, it will also enhance the service aspects such as issuing electronic order confirmation. In addition, the kitchen manufacturer is planning a new commissioning store.

Ballerina places great importance on advanced training and education for the work force, enabling them to switch between jobs as required. This obviously also enhances production flexibility and enables the company to respond rapidly changed customer requirements.

In addition, the company is keen to develop partnerships with its suppliers with the objective of acquiring exclusive system rights for a limited period of time. Ballerina was the first kitchen manufacturer to incorporate the Grass 'Agantis' drawer mechanism and is now also the first to use Blum's door hinge with integral dampening mechanism as standard. Ballerina also has exclusive rights to Resopal's linen-structured and extra-matt fronts; also five finger grips from the 'Made with Crystallized – Swarovski Elements' series. The positive result of all this effort was a 19 percent improvement in

profits in 2008 on a turnover of 48 million Euros (2001, 36 million Euros); there was even a slight improvement in 2009. In contrast to many other businesses, Ballerina had no need for short-time working.

page 30+31

Interzum: SHARPER PROFILE

"Last year's Jubilee Interzum met all expectations in full.

– The furniture supplies industry gave wholehearted support to its leading trade fair.

– Once again, Interzum proved itself to be a world class event.

– The crisis was outside the trade fair halls."

These assertions were made by: Dr. Andreas Hettich, chief executive and proprietor of the Hettich Corporation; Hubert Schwarz, chief executive of Blum; and Gerald Böse, chief executive of the Cologne Fair. The bottom line: the 50th Interzum was a total success, the more so in view of the then difficult state of international trade.

All businesses have their ups and downs, but since 2005 self-confidence has returned to Cologne. Udo Traeger is heads the Cologne Fair's interests in furniture, furnishing and textiles: "There is no way a company can afford to ignore Interzum; more than ever the furniture supplies industry has now synchronised with the two-yearly exhibition cycle." This was demonstrated by the number of registered German visitors to Cologne: in 2005 there were 'only' 11,000 Germans, followed in 2007 and 2009 in each case by 30 percent increases.

Further, during these years Interzum remained a constant industry beacon, while other trade fairs around the world were tossed and turned by the economic turmoil. The changes made since 2005 have now paid off, starting with intense preparatory discussions held in the 'Interzum Lounge' at the Cologne's International Furniture Fair eighteen months in advance of Interzum. Product manager Frank Haubold: "Experience has shown that earlier

contact with customers has paid off; we were able to respond better to market requirements, and our exhibitors profited from discounts for early reservations."

He added that the omens are similarly good for 2011. "We already know that Halls 5.2 (components & ergonomics), 7, 8 (function & parts) and 9 (machinery & technology) will be sold out. So our sales are totally according to plan."

Last year there was also much positive feedback from architects in response to the first 'Interior Innovation' section in Hall 4.2, and the Cologne Fair continues to develop this section as a platform for architects, planners and designers. Next year the Hall will bear the title "Light and innovative materials" and focus visitor attention on how rooms may look in future, especially with respect to the use of materials. Once again "Interior Innovation" will be found on a Piazza in the hall centre and bring together the architectural activities previously scattered between several trade fairs.

The fair will also sharpen up the profile with respect to wood-based materials and surface materials. Says Haubold: "We will use the same arrangements as 2007 in Hall 6 (form & decoration); I am optimistic, because a number of leading players have already signalled their intention to exhibit at Interzum 2011."

He continued: "Last year's event attracted some 400 exhibitors from the textiles industry, making Interzum the world's leading trade fair for upholstery manufacture and bedding. It is our intention to extend our industry span and expertise in 2011, especially with respect to new types of materials and applications."

page 32

Brasil: CONTINUED GROWTH – IN SPITE OF CRISIS

So far, Brazil has weathered the recent world economic crisis very well, in 2009 even managing a slight increase in the Gross National Product. For 2010 the

economic soothsayers are even predicting growth of about five percent. Together, macroeconomic stability and plenty of consumer demand have ensured that the global economic crisis just touched Brazil slightly. Inflation remains under control and access to credit has become normalised. Many investment projects that were halted during the crisis have now been re-started and the country has now advanced to become one of the world's leading locations for trade fairs. Brazil is now the world's ninth largest economy and is one of the nations to have gained by globalisation. Much of this was thanks to the export boom in raw materials to countries around the world. Increasing numbers of investors have been attracted by the need to develop the infrastructure, the preparation for major events such as the 2014 World Football Championship, and the 2016 Olympics in Rio de Janeiro.

GROWTH IN FOREST INVESTMENT

One particularly interesting area is the increasing investment in forestry: 61 per cent of the forests in South America are located in Brazil, which after Russia has the second largest area of forests in the world. To this, economists add excellent national economic performance and good growth forecasts. This is message has rapidly done the rounds between investors. The Inter-American Development Bank forest investment attractiveness index for 25 Latin American countries placed Brazil at the top of the list. In addition, the index gives Brazil top marks for forestry investment profitability.

FEMADE 2010 IN BRASIL

These are all good reasons for the Hanover-based Deutsche Messe AG trade fair company to increase its commitment to the development of trade fairs in Brazil through FEMADE 2010 – the international trade fair for machinery and equipment for the woodworking and furniture industries.

This fair will run for the first time in Brazil under the aegis of Hannover Fairs South America Ltda, a subsidiary of the Deutsche Messe AG. FEMADE 2010 is the sixth fair in the series and will run from 24 to 28 May 2010 in Curitiba, Brazil, but under new management. The move is described by the Deutsche Messe as a logical step in pursuit of systematic growth in prospering markets. FEMADE 2010 continues to enjoy the support of the previous organiser, the woodworking machinery section of Brazil's Abimaq trade association.

Dr. Andreas Gruchow is a member of the Deutsche Messe AG board and responsible for the company's engagement in overseas trade fairs: "We see Brazil as one of the most important future growth markets, for which reason we are pursuing a policy of growth in South America through our Brazilian subsidiary. FEMADE 2010 is an ideal presentational platform for both national and international manufacturers of forestry and woodworking machinery, plus of course their latest products, technologies and applications. The location is ideal, because the Brazilian woodworking machinery and furniture manufacturing industries are based in Curitiba; FEMADE is undoubtedly the leading trade fair of its kind in Brazil."

MOVESULE BRASIL IN MARCH 2010

A further important trade fair for the woodworking and furniture industries is to be held from 22 to 26 March 2010 in Bento Gonçalves, Rio Grande do Sul, one of the major centres of the Brazilian furniture industry: the 17th MOVE-SUL BRASIL will occupy some 54,000 square metres of trade fair space with virtually all kinds of furniture and related products. The two-yearly fair is organised by the Sindmóveis furniture industry association Bento Gonçalves. The previous event attracted almost 34,000 visitors.

At present the furniture industry is concentrating on the manufacture of relatively low-cost

products for Brazil's north-eastern market, where there remains substantial unsatisfied demand. The growth in sales for 2009 was predicted at up to five percent. The Brazilian furniture manufacturers' association ABIMÓVELS says there are now 16,500 companies in the industry.

CONSUMPTION - STATE AIDED

During the recent course of the international economic crisis domestic demand was a major driver in Brazil's continued growth. Even during the most difficult recent months private demand continued upwards and is responsible for about 61 percent of gross domestic product. The Brazilian Government promoted continued demand by reducing the IPI (Imposto sobre Produtos Industrializados) tax to 31 March 2010. Simultaneously, the IPI tax reductions on building materials such as cement, paint and steel will be maintained until the end of June 2010.

INDUSTRIAL OUTPUT DOWN

Industrial output was seriously down in the first half of 2009, but then started to pick up again in the second half. However taking the year as a whole, output in 2009 is likely to be about 7.4 percent down on that of the previous year. During the third quarter of 2009 output was still below that of the comparable period of 2008, but the gap with respect to that year has narrowed. The leading manufacturers say that industrial production will increase this year by 6.2 percent.

Yvonne Brombach

page 36

ZOW: TREND-EVENT FOR 2010

The good news is that the first small green shoots of economic recovery have poked their tips up through the January snow, but this must be followed products with enough thrust to make a difference. It is self-evident that the perfect pre-spring platform for new products is ZOW, in

Bad Salzflun. Located at the heart of the German furniture

manufacturing, this is the meeting place for the movers and shakers of the business; together, the furniture manufacturers and their suppliers will take decisions at ZOW that determine the way forward in the autumn of this year and beyond. In addition, during the past few years, designers, architects and interior completion businesses have also found ZOW to be 'their' natural venue. Here, the professionals will find no less than 618 exhibiting companies covering the entire span of materials and supplies to the furniture industry, and with new products on show from 8 to 11 February.

The ZOW architecture lounge in Hall 23.1 will clearly be an important meeting place. Last year some 1,000 architects and designers made use of its facilities and once again there will be a series of specialist presentations, for example Thomas Bade on 'Universal Design'. He will describe various aspects of his approach to aesthetic and functional form, devoid of redundant details. The aim is to develop products that are equally suitable for people young or old, large and small, able bodied or disabled. The Architecture Lounge is also the starting point for a guided information walking tour through ZOW with particular reference to new materials, lightweight products and durability. The tour will cover selected exhibition stands, each of which will give a short presentation on their materials and products. The ZOW organisers have gone to great lengths to ensure that all goes smoothly at by arranging a number of services. Several times a day there will be shuttle bus from Hanover and Paderborn Airports, and from Bielefeld Main Station to the Bad Salzuflen trade fair and hotels in Bielefeld, Herford, Porta Westfalica, Gütersloh and Bad Salzuflen. In addition, visitors to the trade fair can use the city buses free of charge in Bad Salzuflen on presentation of their entry ticket to the fair. There are parking places for 7,000 cars continually linked to the fair by shuttle buses; a good springboard

for a successful year of furniture business in 2010.

page 38

Thermopal: CLASSIC FILIGREE

When it comes to Thermopal's 'Style' series, the classic designs really come into their own: the latest variants of maple, beech, oak, ash and cherry appear both familiar yet are somehow different – fresher, finer and more filigree. The key difference to the classic original is in the detail of harmonic colour design combined with fine pores and metallic effects. Décor manager Maren Wilbrandt: "We have produced a modern interpretation of five classic patterns, but without sacrificing any of its authenticity. She says that Structure 22 'Naturholzpor' ('natural wood pore') best brings out the natural character of the woods, for example oak with cream-coloured pores. But when produced in cream, vanilla, cinnamon or brown this pattern is somehow more flowery and looks less heavy than usual. Still looking rustic but more filigree than previous, ash looks really good in sand, cognac and brown colours.

Thermopal's 'Aroma Wood' series gives Mother Nature a run for her money; these reproduction wood patterns have a truly exotic flair and are based on an original Asian wood veneer. When viewed close up Aroma Wood is a definite attention-getter. However, stand back a few paces, and the décor changes character to exude an air of tranquillity.

Doubtless Thermopal's new worktop surface structure will attract close inspection. The motto is 'You feel what you see': Selecta looks well proportioned and is extremely flat, and feels velvety and warm. It is also easy to clean, because grease and dirt cannot settle and accumulate. Depending upon the incident light Selecta sometimes looks glossy, sometimes matt, but is always unobtrusive and discreet. It really comes into its own when seen together with stone decors.

In addition, Thermopal's Uni series has revealed that there still

remains much potential in metallic finish. The board manufacturer has been experimenting with colours and structures to come up with five fresh decors: in addition to old gold and platinum, there is now green, blue and violet in combination with metallic effects to reveal a special charm between youthful and elegant. Says Maren Wilbrandt: "It need not always be high-gloss". The interplay between light and shade is much more exciting, a good example of which is the gloss/matt 'Linea' structure; ideal for individual designs both in the home or contract furnishing applications.

Obviously, good design is high on the list of Thermopal objectives, but customer service is of no less importance, for which reason the company recently decided to enhance its fast-track Design-Express delivery system. Now, any décor board listed as being ex-stock can be supplied within 48 hours. Customers can choose between 91 decors on HPL boards and 28 decors on direct-coated décor chipboard with matched edge banding.

The complete range of decor boards is available in standard thicknesses from eight to 38 mm almost without exception as a décor chipboard and as an HPL composite board, within eight working days from Thermopal main dealers within Germany.

page 40

Süddekör: DESIGN MEETS TECHNOLOGY

Süddekör embarked on 2010 with a wave of optimism; the company's participation at ZOW in Bad Salzuflen will confirm the switchpoints as set to success and giving answers to questions asked on the future of domestic interior design. Technical perfection coupled with the highest design standards and from a single source of supply – these are the key factors with which the Laichingen specialist manufacturer of surface materials will gain ground.

In-line with the 2D Corporation motto 'Visions in Design and Technology', Süddekör and

Süddekör Art have sub-divided their 2010 trends into three, with the decor focus on natural and simple wood reproductions including pine, ash and oak. The latest collection includes 'Eiche Macchiavelli' (Macchiavelli Oak'), an impressive variant of this traditional wood: the appearance is simple with soft, restrained colour transitions. This authentic wood décor has universal potential uses, and is deliberately devoid of whorls and knots, and so looks particularly elegant.

Süddekör has taken another close look at the potential for beech decors, and the result is the all-round 'Master Beech' with a multitude of potential applications. By contrast, 'Marmor Marquina' ('Marquina Marble') is a good example of stone with an exciting, strong character, and standing in contrast to the tranquil appearance of wood.

The portfolio is rounded off with abstract patterns of unique character such as 'Quasar', an art-décor product derived from a wood structure, greatly stylised with the aid of distortional tools. Reduced to its lines, the result is a totally new three-coloured look.

In addition to design brilliance at ZOW, Süddekör emphasises its technical skills with decorative surface details such as three-dimensional embossing of melamine furniture surfaces with synchronised printing press plate structure, 'D.Film' Embossed in Register, or the final surface definition with separation paper products supplied by the D.Release group. In addition, over the past few years Süddekör has greatly extended its production of D.Fin finish foils, which are available in a wide range of variants for furniture and laminar floor coverings. These will all be on show at ZOW.

page 42

Rehau: ELDORADO FOR CREATIVITY

Consumers continue the switch to 'homing' and 'cocooning' in increasing numbers, with a major emphasis on 'self-expression'. Creativity must be allowed to run

free; personal style must be recognisable, and individual needs fulfilled. The demand is for products and systems that do not limit creativity, but boost them.

Building on its design, functional, technological and surface skills, Rehau has a wide range of solutions that enable its customers to realise their wishes. Under their motto „We convert ideas into reality“, at ZOW the company will present a range of new products and highlights contributing to the latest in furniture and interior design.

One topic of particular interest is that of high-grade matt surfaces, for which Rehau has adopted a special technology to create surfaces with less than six points gloss-grade. The surface combines the elimination of light reflections with pleasant tactile and functional characteristics: high resistance to scratches and abrasion, plus resistance to dirt, dust and fingerprints. At ZOW Rehau will have a range of absolutely new products in high-grade matt finish: front- and cabinet edges, cupboard blinds and wall trim.

Also in focus: Raukantex laser edge. This new type of edge-banding has a functional polymer coating on the rear face activated by laser beam to produce a permanent, seamless heat-welded union between edge banding and chipboard, requiring no adhesive and eliminating optical blemishes.

page 43

Hesse: INNOVATIVE PAINT

There has always been a problem with spray painting the complex three-dimensional shapes found in many kitchen components, so the latest innovative 'UV-Hydro-Dual-Cure' paint from Hesse is bound to attract much attention from the kitchen industry. Like polyurethane (PUR) paints, the new product hardens well in the presence of UV radiation and conventional isocyanate hardeners. Another advantage is that the new product is not subject to the UV-hardening problems associated with some colours. Excess colour-dependent

heating is avoided by the use of UV cold light technology.

The new paint system combines the advantages of environmentally friendly paint systems with excellent surface finish characteristics. The use of modern drying technologies such as MOS- or IR-driers shortens the venting period and ensures total removal of water vapour prior to UV-hardening. Another advantage of the Dual-Cure paint system is that the lower components will dry without exposure to UV radiation using only isocyanate hardening.

The end-hardness and durability achieved are only slightly less than that for UV-hardened surfaces. The bottom line is that the manufacturer can adopt a single paint system for the entire kitchen, combined with greater certainty with respect to colour changes found under different lighting sources (metamerism). The Hesse paint chemists have succeeded in achieving a superb balance between UV- and isocyanate hardening properties. The UV hardening process has resulted in mechanical properties and resistance to chemical attack at the same level as those of the well-known two-component PUR paints. This has been proven by a series of tests conducted both by Hesse and independent laboratories. Many standard water-based paint systems show an inability to withstand attack by substances such as coffee.

The system can be supplied to a range of different gloss finish standards and in addition is suitable for incorporation of a timeless pearl surface structure. Paint shop managers will be glad to know that the system can be supplied to meet any colour requirement; each batch is produced using the same accurately measured components to exactly the right viscosity that will hold up on the edge. Hesse Hydro-UV-Dual-Cure paints facilitate rapid charge-related production process – i.e. short production cycles – and eliminate the need for large warehouse stocks.

page 44+45

Interprint: NEW ANGELS AND HORIZONS

Especially in the décor print industry it has always been useful to look over the horizon, ask questions, and try to see things from a different perspective; it enables the designer to jettison blinkers and discover a new range of options. With a bit of luck, he may then find that pot of gold at the end of the rainbow. This was the approach chosen for Interprint's forthcoming presentation at ZOW - entitled 'Ansichtssache(n)' ('Points of view') – which will combine both exciting new designs, and the ability to study new decors from many different angles.

Naturally the stand design has been chosen to emphasise this approach, with curved walls and plain metallic surfaces, that together with the décor panels form an exciting setup in their own right. There are overlain and interlocking spatial effects of light and shade; then telescopes open up surprising insights. Whether far away or close up: different views challenge the observer to find his own standpoint.

When it comes to decors there are light coloured wood designs, often modern with a touch of grey-green at the centre. The new décor 'Roxy' will be on show at ZOW for the very first time, and will doubtless be a highlight of the stand.

Of course, technical innovations always open up new perspectives in interior furnishing. For example, digital print technology now allows for speedy manufacture of small premium product batches. This is a hot topic and Interprint is to set up a Web Shop on its internet site, offering high-quality print in CMYK- and roto-gravure colour-space on special Interprint paper. The new Concept.F collection is intended for a new target customer group: the foil has optical pores and a high-gloss finish achieving the highest design and quality standards. At ZOW, Interprint will present a number of top-notch samples.

For many years Interprint's preparedness to alter its standpoint and be open to changes has typified the approach. Thanks to

its underlying 'Fast Forward' business philosophy, Interprint has repeatedly set new higher standards for decorative surfaces, and together with its partners has sought answers to questions not previously asked. This is a process that has triggered original ideas all round and led to new long-term solutions, so everyone's business is switched to 'fast forward'. The creative thrust has positioned Interprint as a leader for designers, furniture manufacturers, architects and shop fitters. At the forthcoming ZOW trade fair Interprint will be distributing copies of its booklet 'Ansichtssache' to demonstrate the enormous range of facets found in its designs, with exciting examples showing how Interprint is continually looking and thinking in new directions.

THE BANANA AS A METAPHOR FOR ART

In 1986 graffiti artist Thomas Baumgärtel started illegally to embellish the facades of museums and galleries by spraying on banana images. Initially he was sought by the police and arrested but he persisted and so far has sprayed on his 'tag' about 5,000 times in Germany and abroad. As the years passed, the initial hostile reaction switched to open acceptance. Gallery owners have even invited him to make his mark on their building, and his banana images even found their way inside to stand there as 'art'. In December 2009 a special 'art issue' of the German business magazine brand eins, featured the work of Thomas Baumgärtel, whose yellow images have since become the unofficial trademark for German graffiti artists.

This story inspired Interprint's visual leitmotif for ZOW 2010: is this graffiti, or art? Is it décor paper or the ultimate in furniture design? Depends upon your point of view. However, the ability to take a new look; is the foundation of all innovation.

page 46

Fine Decor: EYE ON THE ENVIRONMENT

When it comes to high level skills in the area of surface

materials, the name that springs to mind is Fine Decor. Irrespective of whether 2D or 3D, the company always has the right answer ready for customers; and at ZOW, Fine Decor will have a number of interesting new products including the PET-3D high gloss foil for deep-drawn applications. The new foil not only has a brilliant appearance and functionality; it underlines how for many years Fine Decor has been investing in the development of environmentally friendly non-polluting products. Like all PET foils produced by Fine Décor, this new product can be recycled one hundred percent. In addition, Fine Decor is exhibiting a new super-matt PET-2D mantle foil. These products combine a Class Four Gloss rating with superior resistance to scratching and abrasion, thereby extending the range of suitable applications. The foil has a soft touch surface that easily passes the fingertip test and already forms part of the Fine Décor ex-stock range. This new product emphasizes the current high-gloss trend, which continues an inexorable march. Here too, Fine Décor plans to point the way forward with new ideas.

In addition to these new products the company has a comprehensive range of ex-stock materials with about 80 products, available in quantities small and large without a minimum order. Visitors to the ZOW trade fair should not miss what there is on offer in Hall 22.2/Stand B12.

page 47

Impress: EXOTIC NOTE

Decors need a clearly defined, universally recognisable structure and characteristic design, says Impress. That was their prime objective when they went looking for inspiration in Barcelona, Berlin, Curitiba, Frankfurt, Moscow, Vienna and Warsaw. Not surprisingly, since Impress has print works in all these countries. Each city symbolises a particular international lifestyle trend which finds its expression in different décor structures. For example, Moscow symbolises the blend of European

culture and oriental opulence with heavy, royal colours such as black, red and violet form the base for gold and glittering crystal. Exotic woods such as Indian Ebony are typical for this category, combining exclusivity with an authentic note of nobility. The distinctive of ebony appearance is enhanced by beautiful wood grain lines combined with well-proportioned sapwood sections. This décor is available in numerous colour variants and is suitable for upgrading different types of interior – from kitchen to living room and caravan.

There's no doubt about it: Indian Ebony is destined to become a big success. The décor has a high recognition factor, marking it out as unique in a wide field; no doubt the reason that it received a wide welcome from the market immediately after the launch in leading markets such as Germany, Poland, Brazil, Russia and Turkey.

page 48

**Schattdecor:
NATURE THE INSPIRATION**

At this year's ZOW trade show Schattdecor will display numerous new decors and unusual foil products on Stand A4 in Hall 22.2. At the focal point of the presentation are two new foils: 'Smartfoil Real' and 'Postfoil 3-D' combined with specially developed decor structures, with the main emphasis on inspiration provided by natural patterns.

The designs are a symbiosis of cool minimalism with warm, natural elements and Schattdecor has come up with three main design lines: 'For all' contrasts natural patterns with cool, industrial materials; 'For us' combines craft with modern designs; and 'For me' places nature in dialogue with an artistic field.

The 'For all' collection is best suited for the kitchen with untreated natural-style materials contrasting with industrial surfaces. The details derived from nature loosen the cool modernity and geometric form language, thereby creating a new easiness. Oaks, which look

as if they are either untreated or chalked, are combined with stone, stainless steel, glass or innovative materials. The picture is determined by use of much white, pure material colours such as concrete or metal, plus light to medium-brown and grey-shaded wood. The décor 'Canterbury Oak' is a perfect example of the 'For all' line, with the character of solid wood. The very natural knots and clear pores are finely drawn to appear authentic and three-dimensional.

The 'For us' is best used in the living room with its harmonic interplay of different materials and shapes. The dominating patterns are wood, raffia, wool and craft furniture styles. The furniture form-language is light and straight lined. Decors extend from light conifer woods to birch, maple, ash and beech, through to natural-coloured oaks and generate a warm ambience. The accessory colours are powdery colour tones, grey-violet, warm sand and black. These all match very well with 'Arusha Wenge', whose three-dimensional appearance is modelled on a brushed high-grade wood pattern with narrow strips alternating with fine material and decorative knotted zones.

The luxurious 'For me' line has a new and artistic individual touch predestining it for the bedroom or bathroom; the surfaces have all the appearance of hand-made unique samples. The trend is to creativity and classic charm in lieu of opulence, to produce a personal and individual style. The resulting furniture style is very elegant. The wood décors selected for this line are expensive walnut or medium to dark-brown filigree structured tropical woods combined with bronze, gold and olive tones. A good example is the streaked 'Montreux Nussbaum' (Montreux Walnut) with distinctive annual rings, whorls and slightly discoloured zones.

page 49

Abet Laminati: LOUD AND CLEAR

Just to make a point, the colours are not only bright, they

are also shrill; and the reason is that Karim Rashid designed the new Kasa Digitalia range for Abet Laminati consisting of 27 laminar decors, all digitally printed. The names of Rashid's hip creations include 'Aquatik', 'Bleep', 'Morph' and 'Replicant'. The point of these brilliant highly coloured decors is that they create an optical illusion – fascinating and attractive at once.

Rashid's graphic lines have different modular schemes and provoke an impression of instability. His objective is to convey strong impressions, forms, pictures, signs lights and colours to trend-followers. When operating within the framework of his Abet Laminati Collextion, the popular designer sticks to his own philosophy – trying to awaken feelings and sensations.

Ever since it was founded Abet Laminati placed particular importance upon design and culture. In the course of the last 50 years the décor manufacturer has worked with such top designers as Giogetto Giurgiaro, Ettore Sottsass, Alessandro Mendini and Mario Bellini, to name but few. With his Kasa Digitalia project Karim Rashid and his provocative colours and shapes not only revolutionised the potential applications for digital print, but set a trend. His latest laminar creations can be seen at the Milan 'Triennale' and at ZOW in Bad Salzflun.

page 50

Hornschuch: LATERAL THINKING

The name of the game for Hornschuch at this year's ZOW fair is to go for a completely new interpretation of wood decors. Günter Roth heads the company's Skai furniture business: "In this context the choice of wood variety is less critical." It was, he said, of more importance to achieve a clear-cut independent character, and to create a well-balanced composition that exactly matches the Zeitgeist by choice of the right wood grain, colour and structure. "These decors are increasingly of independent character, and are imaginative without being pure

fantasy products. The objective is always to achieve the best combination of options using different plain colours and surfaces."

The trend started by Hornschuch to new types of matt surface has already triggered lively demand for decors providing carefully targeted support for plain colours; the best solution is to use them in the popular transverse format. In addition, customers now place increasing importance on surface tactile characteristics. Says Herr Roth, "Ideally, embossed pores must be parallel with the grain and clearly detectable by finger touch."

One of the latest wood decors with this characteristic structure is 'skai Avola', with an undefined boundary between wood décor and fantasy wood, almost creating a new type of material. With light colours and targeted colour alienation it achieves a tone-in-tone harmony that is an emphasised extension of the streaky wood lines. This unusual character is emphasised even more by combination with the surface structure of 'skai Matex'. It can be supplied in restrained colours such as cream white, Champagne, New Grain and Truffle brown that go very well in particular with the greys and greens now popular on kitchen fronts. Similarly, 'skai Core Ash' is another 'chip off the block'. The character of this trend décor is that of a stained, handcrafted finish – gold-brown to grey with clear grain lines, concise annual rings, slight whorls and a lively interplay of colour. In both home and contract furnishing applications skai Core Ash goes very well in creative combination with stone, glass or metal and a range of Hornschuch plain colours such as 'Magnolie', 'Muschel', 'Dakar', 'Schilf' and 'Fango'.

Likewise, the colour and grain of 'skai Sardegna' are carefully balanced. This décor derives its character from an exciting interplay between slightly curved and straight elements. The plank pattern is restrained with a slight suggestion of annual rings to create an impression of exclusive elegance.

The colour options range from light silver grey and dark anthracite tones to natural colours in the light to a medium beige-brown range. Another advantage is that the décor is suitable for universal use – in both horizontal and vertical applications.

More excitement: on arrival at the Hornschuch stand visitors will be encouraged to engage in a bit of lateral thinking in the 'creative lounge'. Here, they may play with a seemingly unlimited range of combinations of decors, plain colours, structures, mobiles and building blocks, and vote for the 'skailight' of the year.

page 52

Renolit: THE FINGERTIP TEST

At the forthcoming ZOW trade fair Renolit Design invites visitors to step into the 'Paradise of Diversity'. The company's trade fair motto, used last year for the first time, reflects the current trend – presented in a restrained grey on a 150 square metre Stand B4 in Hall 22.2. This year the latest decors will be presented on style elements – décor trees, hanging hexagons, sample furniture, and the 'communications belt' made up of different coloured tables and benches.

One of the most important aspects of these new developments is that of their surface touch characteristics; the scale extends from deeply embossed to ultra-smooth structures. When it comes to optical effects super-matt surfaces are now much more popular, but high-gloss continues to dominate. Renolit has put a major effort into the extension of its Munich print works and perfecting its high-gloss processes, thereby setting new standards in the European foil market. The high gloss technology, which achieves up to 98 Gloss Grade combined with a distinctive calm, is used in conjunction not only with new decors, but also in new structure combinations.

That includes 'Twin Gloss' whose organic ornamentation results from a combination of high gloss and extreme matt structures.

The different degree of roughness in different sectors creates an interesting interplay of light on plain colours combined with the excitement of the fingertip test.

The 'Grace' décor surface has a series of uniform circles spiralling into each other, creating a finish that is three-dimensional both in terms of its appearance and tactile characteristics. The embossed hairlines create a network emphasising the elegance and decorative nature of the embossed surface. This creation best unfurls its effect together with plain colours and metallic white gold.

The print décor 'Spirit White Gold' has a totally different approach to the creation of a lively appearance: here, spirals seem to break open the white gold coloured surface and make a discreet transition with silvery waves to form an impression of space. When backlit, the spirals on the flawless high gloss surface – which are similar to craft chase-work – alternate between light and dark to emphasise the appearance of depth.

Another main focus at this year's ZOW will be the new trend colours for 2010 and 2011, which Renolit will display in the 'Colour Road' trend-service. This tasteful range of new colours has five basic design ranges under the global heading of 'Transmission', and focusing on Climate and Durability. The colours range from neutral black, white and silver tones, through earthen beige and copper to the new blues and greens.

All the colours have a warm, domestic appearance; even Stardust Silver metallic silver that is normally so distant, appears to be very light but not cool and forms a harmonic contrast to the cool blue tones of 'Glass' and 'Ocean'.

The higher the proportion of red, the warmer the colour; the new metallic 'Amber Gold' tends towards gold and bronze and harmonises with reddish wood reproductions such as Zebrano, cherry wood and mahogany.

The new décor 'Casual Elm' has a different approach to natural

appearance – an alienated fine-pored structure whose warm beige/grey is the very essence of cosiness. White lines provide an irregular conspicuous accent following the grain and enliven the regular structure in their own way. 'Blackberry' is an aubergine tone that forms an elegant contrast to the décor, while 'Meteor Grey' is more of a restrained anthracite colour.

Three further wood decors pursue a more classical route to optimise their respective grains in their own way – like the two beech decors 'Tauern' and 'Union'. While 'Tauern' combines the elegant lines with gnarled knots, 'Union' places more emphasis on balanced lines with uniform grain markings. Likewise, 'Camara' ash fascinates with realistic details such as fine knots and detailed transition from light and dark sections – a good starting point for what may well become the trend wood for

page 54

Bausch Decor: FASHION MEETS INTERIOR

At this year's ZOW trade fair Bausch Decor will display a range of innovative products which, as ever, will be a canny and accurate match with current design trends. In particular, the fashion for high-contrast structures and colours has now passed its peak; consumers now seem to prefer harmonic, friendly and light coloured interiors. Currently fashionable colours such as Magnolia, Champagne and Camel Hair are enjoying a renaissance and are well re-established in the home. Once again, interiors are brighter, lighter and give an impression of distance.

At this year's ZOW Bausch Decor will be exhibiting new décor structures and colours on the Surteco joint stand B14 in Hall 22-2. The top new-look decors for 2010 are Comina Ash, Chorona Sucupira, Brighton Beech and Gotland Ahorn (maple). This trend is further supported by native and renewable woods with filigree structures such as 'Tauern Lärche' (Larch) and Cornwall Oak.

Whatever the décor pattern, it does not get across properly unless it has the right surface. The natural charisma is emphasised by a suitable surface structure embedded and detectable within the melamine surface. In addition to the well-known Wood Look surface, in the finish-foil sector Bausch-Linnemann now has a complete solution with 'Haptec', a surface whose elegant and expressive good looks also incorporates a tactile surface. Matched décor materials with fingertip structures and brilliant matt-gloss effect work wonders with wood decors and plain colours.

page 55

Döllken: ENORMOUS RANGE OF CHOICE

At this year's ZOW the Döllken product portfolio's regular range of quality products will be boosted by a number of highlights. Of particular interest is the greatly extended range of edge-banding available for immediate delivery, with special emphasis on the continued trend towards high gloss colours and no fewer than 70 colours and decors available ex-stock. Döllken claims to have the biggest range of high-gloss thermoplastic edge banding of any manufacturer.

Furniture manufacturers have virtually no limit to their design freedom: the range extends from standard colours such as white, grey and black through blues and reds to bold trendy colours such as apple green, lilac, pink and yellow. In addition to rainbow colours there are classic wood decors and exotics such as ebony and olive wood. The range is rounded off by the regular metallic decors such as aluminium-finish.

The range of edge-banding on Döllken's ex-stock list is ideal for carpenters and joiners, providing as it does an enormous range of popular colours and decors with an elegant mirror-gloss finish achieved with a final coat of high-grade lacquer; Döllken always has the high-gloss edge-banding match for Thermopal, Formica, Wodego, Funder-Max and Senosan boards.

page 56

Formaplan: EQUIPPED FOR THE FUTURE

A successful track record, but steadily looking to the future: that in a nutshell is the story of Formaplan and chief executive Rudolf Henrichsmeyer, who recently celebrated his 70th birthday. He took on the Geha Möbelwerke furniture factory from his father in Josef in 1967, since when he has brought the company into its present size and status. Rudolf Henrichsmeyer succeeded thanks primarily to his ability to spot trends and market changes at an early stage. Also, his close relationship to the factory workforce formed a major part of the company's success. He said: "Our work force is the most important part of our capital."

One very important decision was to separate the business of supplied parts from the Geha-Möbelwerken business into a new subsidiary, Formaplan. It was a good move: Formaplan now has a comprehensive product spectrum ranging from the raw chipboard right through to the finished and pre-packed furniture, thereby differentiating itself from the competition. Not only can Formaplan integrate the entire range of standard production processes; it also offers many specialist processes.

Formaplan can process a wide range of different surfaces, irrespective of whether these be veneered, pasted or painted. In addition, the company can mill, plane and machine to customer requirements, and apply both thin and thick edge-banding materials.

And the customer has a choice: he can opt for components to be supplied in industrial packing to any process finish stage, or have it delivered finished and packed to retail requirements.

Formaplan has a major competitive edge when it comes to pre-packed products: all kinds of furniture components, including classic bought-in items such as drawer frames, are all produced under the same roof in specialist production zones. The only items

procured from external suppliers are metal hardware fittings.

The internal logistics system brings all materials and components rapidly and smoothly together for assembly and dispatch, so the customer receives a complete package from a single source of supply. The great news for customers is that internal synergies keep the costs down, with the costs being described as 'better than fair'.

Rudolf Henrichsmeyer's philosophy is that the firm should have a perfect blend and balance in its operations. With an eye to the company's future, in 2005 he appointed his son Rolf as chief executive of Formaplan. The decision was a good one and gave the company a further boost with fresh ideas. Rudolf Henrichsmeyer has given his son Rolf the freedom necessary to develop and realise his own ideas, so Formaplan is now well equipped for the future.

page 58

Chiyoda: UNIVERSAL USES

At this year's ZOW, Chiyoda will have a range of decors of the very highest quality and with universal potential applications. Under the motto 'Design at its best', the underlying wood décor is gently subsumed by colour and structure. The more important objective is to create an atmosphere making an important contribution to the ambience of the home. Certainly, this does not mean that the decors are not produced of the very best; top design has been synonymous with the name Chiyoda for many years. There are 26 brilliant new decors with highlights that will surely trigger much discussion at ZOW. For example the modern 'Straight Olive Ash'; the décor has a combination of colour interplay with an absence of the usual planks. This combination gives 'Olive' its special character. The 'New Look' framework creates a totally new combination of wood décor and colour/structure and is represented by 'Mystic Wood', with added exciting wood-metallic effects. Its

elegance makes 'Mystic Wood' an all-round universal decor. So is 'River Oak' with its patina based on chalked pores, exuding enormous warmth and cosiness. The exciting thing about this décor is that when seen close up it is full of interesting detail, but stand back and the view is one of tranquillity. Likewise, the wood variety is relegated to the background in 'Carpatian Beech'; the key feature is the combination of colour and structure, making this décor a true all-rounder. The same holds good for 'Core Ash', a bleached and totally natural trend wood. With slight knots and whorls it can be used in both vertical and horizontal presentation. These new decors provide furniture manufacturers with a superb design tool; so make sure to visit Chiyoda in Hall 22.2 on Stand D4.

page 59

Reichert: SOLITARY SKILLS

For over 50 years Reichert Holztechnik, based at Pfalzgrafenweiler in Germany, has manufactured furniture components for customers in the kitchen and bathroom furniture industries. In particular, Reichert has long demonstrated comprehensive skills in the production of high-grade surfaces. In addition to furniture fronts and surrounds with matt-structured- or high-gloss paint finish, the repertoire also includes fronts made in solid or part-solid wood. Other choices include high-grade rare woods – including veneer – either planked or marquetry, hand-decorated and patinated country house surfaces. Reichert can also supply the surrounds to match rustic cassette fronts – from the base plinth to top profile trim and pilasters.

Throughout Europe there has been a general trend towards incorporation of the kitchen into the general living area. As a consequence, Reichert has increasingly been called upon to fabricate a range of small and incidental furniture for both kitchens and bathrooms. Products include cabinets for sound systems of the highest standard. The standalone

items can be supplied fully assembled or in knock-down condition for packing and export. In addition, Reichert has done very well in the contract furniture sector and also cooperates with shopfitters, shipyards and interior furnishers. These are areas calling for specialist skills and a wide variety of products and solutions. Also, customers greatly value the provision of individual service. Whether the requirement is for complete components or just to paint or lacquer finished components, the customer can have as little or much as he wants.

page 60

Thermocell: TOMORROW'S FOIL

Though in widespread use, PVC plastic foil is not always regarded as a universal blessing from the environmental point of view and cries out for innovation to solve the problem. Thermocell manufactures mainly polypropylene-based foils for the furniture industry that do just that; the foil is made by a flat extrusion process with either a smooth or embossed surface finish. Thermocell then prints the décor pattern on the foil in-house with water-based ink or paints.

The environmental friendliness of the resulting products forms a key aspect of the company philosophy. Sales manager Jan Zimmermann: "We are convinced that our product has a certain future. This has been clearly underlined by forecasts and market research." Thermocell foils are made of polyethylene, polystyrene and polypropylene in particular. The range of products represents an innovative, cost-effective alternative to PVC that is very easy to process. The hidden agenda is that ultimate disposal of PVC is very expensive. In addition, it is unpopular with consumers, who would prefer not to have it in the home but some other material. Clearly, 'ecology' has become an important marketing instrument, but to use this as a sales proposition the furniture manufacturer needs a supplier like Thermocell. Happily, this company not only has the

best possible ecological references, but also has an experienced workforce able to switch production at short notice to meet customer requirements. Thermocell is also able to replicate patterns with total accuracy and guarantees uniform product quality throughout. If requested, Thermocell can adapt the production process to meet specific customer requirements and will, if necessary, travel to the customer's factory to work with machinery operators and bring products to production standard. Rien ne va plus.

page 61

Schorn & Groh: TOTALLY FLEXIBLE

Can you actually bend real veneer through 360 degrees without damage? No problem with Easiwood from Schorn & Groh. It is even quite straightforward to cut with a knife or scissors, thanks to a non-woven bonded underlay especially developed for Easiwood. During manufacture the product is 'broken in' to make the fibres supple and extremely pliable, with the result that rounded areas or edges and corners are not a problem. The Easiwood range includes Ash, American Cherry, American Maple, Bamboo, Sapeli, European Oak, Beech, Ebony, White Oak, Pine, American Walnut and Zebrano.

For those wanting a more original product, Schorn & Groh has a range of more than 130 other veneers. Easiwood is supplied finished save for the application of lacquer or oil.

Another new product area is that of veneer-strengthening fleece for presses and coating machinery, plus comb-joined and butt end-joined self-adhesive tape, all produced with the many years experience of Schorn & Groh. All three products consist of cellulose fibres strengthened with polyester fibres and an acrylic binding agent. During manufacture the material is soaked in PVAC adhesive. During the pressing operation a second film serves as the bonding agent. The products will be on show at ZOW in Bad Salzuffen (Hall 20, Stand E40).

page 64+65

Hornschuch: GROWTH AND SENSIBLE ACQUISITIONS

"We were hit just as badly as everyone else in 2009: and at the same time in all five of our cores businesses! But because we reacted to the crisis at once, we came through the last twelve months okay", says Lothar Machule, general manager marketing & sales for Hornschuch. Luckily, last year there were a number of plus factors that came together to ensure that Hornschuch emerged strengthened from the international crisis. In December 2008 Hornschuch decided upon short-time working; this lasted for six months and at the same time postponed a number of investments. But by contrast, the corporation continued with its R&D programme unabated, because "that is our capital", says Machule. "In addition, we were greatly assisted by our brand quality and reputation as a reliable supplier. There were a number of customers who had left for cheaper suppliers, but who came back to use because of our price-performance ratio."

This will not come as a surprise to anyone who follows this market sector, because the planning that takes place in the furniture and automotive industry is always on a short time-scale. Customers are dependent upon flexible suppliers such as Hornschuch who have a reputation as a reliable supplier. "As things stand at the moment, our customers would like to place their orders today and have delivery tomorrow; and we do our best" says Machule. "These measures certainly made an important contribution to the fact that, measured against the general trading conditions, Hornschuch did well in 2008/2009. For many months we have had no more short-time working and we were able to pay our people their Christmas bonus in full", said Lothar Machule. "Nor did we have to cut the work force."

In addition, Hornschuch made a useful acquisition with specialist coating company Kek. "This

enabled us to extend our value-added chain one step more towards the customer, to whom we can now provide a better and more individual service. In addition, we want to protect our organic growth through acquisition, in particular where it optimises the added value chain. Likewise, future purchases will extend our portfolio towards the customer; as we see it, there is no sense in Hornschuch becoming its own supplier." In line with this philosophy, Hornschuch plans to spread out over the next two years, a course that is backed by the majority shareholders owners Barclays Private Equity. "We originally decided to go with Barclays because we have the same philosophy with respect to both growth and the long-term view," says Lothar Machule. In addition, this partnership puts Hornschuch in a very strong financial position, most enviable in the current international situation. "At the moment we are very optimistic about the year ahead and anticipate growth, but we do not anticipate a really strong improvement in the economic situation. The signals from the market simply do not make this likely. Likewise, our customers are unable to offer any reliable long-term forecasts." On top of that, there are a number of markets such as Russia, Ukraine, Spain and England that are more or less still bumping along at the bottom. By contrast, business in Germany is stable and surely ready to absorb the latest range of Hornschuch products. "In particular, we are very proud of our innovative new 'Laif' upholstery covering material which sets a new standard with respect to respiration and comfort", says Bruno Lehmann, who heads the Skai Fashion business sector. "In this respect the respiration properties are better than leather and it is also highly resistant to abrasion. We are absolutely certain that Laif is better than anything else at present on the market."

Hornschuch also places great importance on the ecological aspect of its products. For

example, it uses only solvent-free polyurethane components, and PU finishing takes place on a dispersion base; the material substrate consists of natural fibres and naturally this new generation of upholstery covering synthetic material combines ultra-low emissions with long service life. Says Bruno Lehmann, "We place enormous importance on the ecological aspects because this forms an essential part of our in-house philosophy; but in addition, ecological factors have continually risen in importance for our customers. Now the challenge is to get the product closer to the end-user. Leading manufacturers of upholstered furniture have already signalled their interest in this new generation of material and are highly enthusiastic about its properties. This indicates we are on the right track and it will be a success."

Hornschuh sees itself very much as an ecological pioneer with respect to another product range: the synthetic 'Skai Nature Base' is made 80 percent from natural, renewable raw materials and represents an alternative for those businesses that want to use synthetic materials on the basis of natural renewable materials. In addition, there is a bio-cotton substrate that is certificated in accordance with GOTS guidelines (Global Organic Textile Standard).

In addition, this long-life material meets the requirements of the medicine product law (DIN EN ISO 10993-5+10) and Ecotex-Standard 100. Herr Lehmann is certain: "This is especially so for customers who are ultra-critical when it comes to ecological issues; Hornschuh will find the right partner, and I think that this aspect will increase in importance in the years to come. We expect a lot of interest in Laif and Skai Nature Base at ZOW, where we expect to meet a lot of customers from the cabinet and kitchen manufacturing industries. At ZOW the emphasis will be on decors and surfaces," said Günter Roth who heads the company's furniture supplies business. "We can

already see an increased demand for matt surfaces, for example from such market leaders as Ikea." Hornschuh believes that in 2010 there will be much more interest in structures and colours, together with an attractive mix of different optical and tactile elements. "This can result in a new look that triggers consumer interest and demand; consumers are definitely open to something that is individual and special", says Roth.

"It is now very important for us to come forward with genuinely new products; we need customers now", says Lothar Machule. "I am absolutely certain that we are well positioned for a successful 2010".

page 66+67

Vauth-Sagel: KEEP IT SIMPLE

"In spite of the fact that last year our turnover was down by two figures, we nevertheless finished in the black", summarises Claus Sagel. "We paid great attention to running an efficient operation and hence turning a profit. Even though the international finance crisis hit the global economy hard, it still opened up new opportunities to gain market share. During last year we had a host of very interesting discussions with potential new customers. That was one of the reasons we continued to grow in the German market." Given this situation, there is no reason for Vauth-Sagel to back-pedal; on the contrary, they are going full steam ahead by opening a new factory in the USA at the end of February to the beginning of March. Said Herr Sagel: "We going to manufacture plastic turntables at Greensboro/North Carolina with about 15 people; these kitchen products are now very popular in the USA. The production tooling will be set up by the middle of February; we will start production in early March and deliveries in April."

This investment is in-line with Claus Sagel's forecast for 2010: "Exports will start to rise again. We think the markets that were the latest to begin recovery – with the possible exception of Spain –

will resume growth. In this I also include the USA, England, Russia and China. In the latter instance production continues at such a high volume, I almost have the feeling there was no crisis at all. When it comes to the USA, accepting there was a serious dip in demand, one must not overlook the fact that this market still has enormous purchasing power."

Claus Sagel says it is quite possible the company might decide to set up production in the Far East at some time during the next five years. "This would make sense because of customs duties and the complexity of our systems, but we would only sell products from our Asian factory within Asia. It would make no sense to re-import them."

However, Vauth-Sagel continues to invest large sums of money in the home market; a new 1.5 million Euro logistics centre is under construction in Brakel and will be ready by the end of 2010. "And that is just the first step; over the next few years we will considerably expand production. Including product development costs, over the next five years we will invest between 10 and 15 million Euros", he said.

The company will take the opportunity to change some of the product factory locations, with the furniture industry allocated to Brakel, while Mauser Care hospital and medical furniture will go to Beverungen. Plastic injection moulding processes remain at Padernborn, while office furniture and steel products will be in Korbach.

Claus Sagel emphasises: "Our investment is a clear commitment to continued manufacture in Germany. One must not overlook the fact that the furniture and kitchen furniture industries are highly concentrated here. We can only look after them properly on a regional basis with an individual product and service package. It would not be possible to serve a complex company, such as Nobilia with all its different requirements, from a supply base in another country. I don't think that would work."

In addition to the substantial level of investment in production facilities, the company has also been spending a great deal on new products. "We more than doubled our development budget in 2008/2009; times like these call for creative ideas."

But the company now has its gaze firmly fixed on product utility and emphasizes that the systems must not become any more complex. "I see enormous innovation potential in product simplification. Many requirements calling for convenience and function can be achieved without resource to complex technology."

One new product that is certainly in-line with this philosophy is the 'Recorner maxx' designed for corner cupboards. The unusual feature of the new system is that the swing shelves are not supported by a central tube taking up space; this increases the available space by about one fifth. The shelves are mounted on transverse supports that hook into holes at regular intervals in the sidewall support profiles, allowing easy repositioning of the shelves as required. The Recorner maxx is also suitable for retrofit to existing cabinets. Says Claus Sagel, "This product is so simple, that you really have to ask why it was never done before. But the simple fact is that it is unique and we were the first. So of course, we have patents to protect the design."

The Vauth-Sagel management sees Recorner maxx as being representative of a new trend. "During the past few years we have seen numerous new products that were both complex, and some of them even motorised. Electrically powered systems can sometimes be very nice and occasionally even make sense; but they are more usually non-essential. In most cases the user simply wants to open or close a drawer and requires a simple, smooth and convenient action; Recorner maxx satisfies this requirement head-on."

Nevertheless, Claus Sagel says the company has certainly not set its face against complex future

systems, provided they make sense and are wanted by customers. "If you are building a pharmacy cabinet whose moving contents may weigh 150 kg, then electric power may make sense. But it is important not to be mesmerised by technology. Nobody needs over-engineered products; the cost-benefit ratio must always stand up to examination."

In addition to this, Claus Sagel sees a further challenge for the company: design. This is an area in which the competition has the edge and thus a better recognition effect than Vauth-Sagel. "Our strengths are to be found in functionality, easy assembly and installation, plus the wide range of products. But on the other side, in some respects we fall short in terms of development engineering and design. We are going to have to work on that over the next couple of years with the aid of external engineers and design consultants. Of course, we must continue to sell on the basis of a fair price and good engineering, but the products must look good too."

Stefan Müller, Tino Eggert

page 68+70

Tian Jian Group: CHINA BECKONS AND NO RISK

There are many European furniture, kitchen furniture and component suppliers who are already familiar with Gangzhou in China. Located at the centre of China's major industrial region of Guangdong, Gangzhou is also a central, international location for trade fairs. Right at the centre of this prospering conurbation is the Tian Jian Plaza, where the 'Decoration and German Design Center' is located near the Plaza entrance. The underlying aim is to give German manufacturers an opportunity for market exposure in the Chinese market.

The General Manager is Julian Jander, who has many years' experience in the Chinese furniture market: "In the initial phase of exports to China business about ten years ago, German furniture exporters bought space in so-

called 'furniture centres'; they did so at their own commercial risk. In the second phase German exporters opened their own retail outlets. Now, in 2010, there is an opportunity for those companies who wish to export to China, but without hiring their own premises."

The Centre is operated by a subsidiary of the Tian Jian Group, one of China's leading private sector businesses and the German section – at present 20,000 m² spread equally over four levels and now undergoing redesign – occupies one of the best positions in the 600,000 m² Tian Jian Plaza. Says Julian Jander: "The premises are a shop window for the very latest in up-market home furniture. It is a permanent exhibition for furniture, rounded off with accessories, interior furnishing and finishing products, floor coverings, wallpaper, paints and doors. In addition – and on this Julian Jander places great importance – German lifestyle will also be on display. The target customers are private individuals, architects and property developers.

The products on display at the Tian Jian Plaza are purchased in Germany and distributed in China via appointed sales agents, provided that the German manufacturer rents at least a minimum size floorspace in the showroom: "This provides German manufacturers with a great opportunity to get a foothold in the Chinese market," says Julian Jander. "Commercial risk is limited to the value of the products on display in the showroom; the entire planning and concept is under the combined control of German and Chinese designers and interior architects."

The organisation, sales and distribution, after-sales service, advertising and marketing are all handled by the team at Tian Jian Plaza, which acts as the centre's management.

The Chinese are generally unfamiliar with the German system of providing a combination of design advice, the matched provision of furniture, wall and

floor coverings, right through to installation. However, the Chinese like German branded products and other high-value imports, so the building façade and individual internal show-zones will have matching placards.

The showroom location is absolutely ideal, being right next door a new subway station. It is also close to the intersection of two major highways and has a link to the motorway network. Further, the showroom is only 15 minutes from the Gangzhou trade fair, close to the 'Dadaobei' shopping centre and surrounded by ten high-class residential developments which are home to about 500,000 consumers.

Julian Jander added: "Our network of local contacts will be the key to success of the project" In particular, the Tian Jian Group is one of the few furniture manufacturers in the region which has the right to hold its own exhibitions at the Gangzhou trade fair. Further, for many years the Tian Jian Group has had both import and export licenses; it must be remembered that nothing comes or goes in China without State approval. The Tian Jian Group has the advantage of a range of top-notch business contacts not only in the Baiyun area, but also in all of Guangzhou. The Tian Jian Plaza project also enjoys the active support of the City of Guangzhou.

So is this a good time for more German furniture manufacturers to come aboard?

Julian Jander is certain: "Of course the international trade crisis has not left China unaffected; many Chinese firms suffered from the collapse of US demand. But the home market has been growing very fast and demand continues to grow. One of the best indicators is that the cost of housing and rents continues to grow in South China from month to month. The market is wide open and deliveries continue to pour into China."

page 74+75

Ninka: POWERFUL AND INDIVIDUAL

Everyone knows the problem of having to get head-down into a corner cupboard to extract that pot at the back. The Ninka solution is an ergonomic high load-bearing corner shelf that rotates with the aid of a clever piece of turntable hardware the new Powerslide corner cupboard mechanism, which allows for efficient use of otherwise dead space in the corner between two lines of cabinets. In addition, the multi-dimensional pull-out system meets the design requirements of the modern kitchen, allowing the turntable shelf to slide in and out easily and elegantly as required. The resulting easy access to pots, pans or whatever is an absolute joy. In addition, the Powerslide corner-cupboard mechanism allows the shelves to move and forth almost noiselessly. The system is made of powder-coated solid aluminium and steel guides finished in grey, silver or white.

Installation is very simple and each fitting is rated to take loads up to 20 kg without any supplementary support from the cabinet walls. An impressive achievement by Ninka's engineers.

Both the load-bearing interior hardware and the outer 'body-work' are cleverly designed. Ninka has two types of shelf for the Powerslide fitting to go with 45, 50 and 60 cm doors in asymmetric kitchen corner cupboards. The Proarc turntable shelf has a perfectly finished timeless design with ribs for added stiffness and strength that are not visible from above. The seamless finish makes them easy to clean and the dimpled surface prevents surface wear. If required, the turntable can be completed with anti-skid foil and fitted with a surrounding individual rim in grey aluminium, black, or glossy chrome.

The Magnia one-piece tray system is intended for lovers of purist modern design, and is an injection moulded product with no cracks or seams, making the inner contours exceptionally easy to clean. In addition, on request Ninka will provide a high gloss tray rim finish and leave the functional

inner surface as a matt structure. The tray piping is another design feature separating the inner and outer zones; it is available in a variety of finishes such as stainless steel, glossy chrome or wood effect. The metallic outer rim design enables Ninka to match the Magnia with metal drawers and other kitchen furniture features; you can't be more individual than that.

page 76

Grass: CLEVER SOLUTIONS

There is more than one way to solve the knotty problem of providing maximum convenience when opening kitchen cabinet fronts with no finger grips, and Grass is the only manufacturer to have developed no less than three alternatives: the 'Tipmatic plus', 'Sensomatic' and 'Sensotronic'.

The Tipmatic is purely mechanical and is the first synchronised system of its kind; it makes for easy and convenient opening and closing without electrification. But customers seeking the non-plus ultra will certainly be enthusiastic about the Sensotronic, the only fully electronically controlled cabinet opening and closing system. It sets a new high standard by featuring fully controlled travel combined with anti-collision protection and blocking recognition.

The gap between the purely mechanical and the fully electronic is plugged by the Sensomatic electro-mechanical system for furniture whose fronts have no finger grips. A soft push is enough and the cabinet opens up. The Sensomatic draws very little electric current and occupies little space. Another advantage is that the system can be triggered by pressure applied anywhere on the front, making Sensomatic ideal for tomorrow's requirements. In addition, it greatly enhances the convenience and utility of the furniture. In contrast to the fully electronic Sensotronic system, after the Sensomatic motor opens the cabinet the drawer is free to move. Likewise, the closing operation is very simple with the soft-close and silent motion dampening system.

Of course, Grass has taken on board the requirements of the furniture industry, for which reason the new mechanisms are used in conjunction with the Nova Pro and DWD-Dynamic-XP motion systems. Likewise Sensomatic is perfectly suited for use in combination with the sub-drawer Dynapro guide, and the new system can be fitted without any problem into existing standard carcasses and drawers. Another advantage is that it is suitable for retro-fit to existing furniture. Further, the Sensomatic is a highly effective system because it requires but a single type of motor for all weights and carcass widths up to 1200 mm.

The bottom line is that in the Sensomatic a furniture manufacturer has a highly flexible unit and brings advantages for efficient and flexible production. Also, the end-user has maximum convenience in daily use, combined with superb functionality and the top quality of this well thought-out system.

page 77

Lamello: SIMPLE JOIN

Furniture manufacturers all want assembly fittings that combine maximum freedom of design with simple assembly, and that is exactly where the Lamello 'Clamex P' link fitting comes into its own. This clever link fitting opens up a whole new range of design options for interior designers, architects and furniture manufacturers. Up to the present, the technical options available in assembly fittings placed strict limits on design; but now Clamex P allows for better implementation of creative ideas. It is the ideal link fitting for panel bevel joints from 30° to 180°; also for frames, straight-, corner- and back-panel joints and can be disassembled. It is ultra-simple and requires no tools for assembly, thereby facilitating a new approach to manufacture, logistics and assembly. Workpieces can be transported with the link fittings pre-positioned, greatly reducing on-site assembly time. Thanks to the push-pull lever,

disassembly is no problem, facilitating clever furniture designs. The link fitting only requires a six millimetre hole to dispense with ugly cover caps. Also, no part of the link fitting projects from the furniture component in question, which makes for easy stacking. Another advantage is that Clamex P cannot twist or turn in situ, because it both joins and aligns the workpieces without any supplementary positioning components. The resulting joint is both strong and absolutely secure. The Lamello link fitting will be on display at ZOW Bad Salzflun in Hall 19, Stand B6.

page 78

Häfele: LIVE SYSTEMS SKILLS

It is engineering design skills that really produce the innovative hardware required by the furniture industry and at the forthcoming ZOW fair Häfele and office furniture specialist Anton Schneider will demonstrate their strengths on a joint stand with numerous innovative products. Häfele will be demonstrating its comprehensive skills in lightweight construction. This includes the AEROFIX 100 expanding / adhesive dowel for frameless lightweight panels with a 4 mm outer layer as used in automated industrial processes. The company will also display new ideas for multi-functional furniture with innovative hardware fittings. In a twinkling of an eye the new hinge fitting will convert a bed into a desk and vice versa. Häfele will also show its drawer construction skills with the 'Moovit' system. If desired the system can be incorporated into industrial furniture production; it is primarily suited for use in kitchens, living rooms, bathrooms, offices and laboratory furniture. The basic version has full-travel with self-closing and integral dampening. Also, the 'Smuso' fitting proves that sliding doors can move quietly and may be supplied for sliding doors of any weight.

Häfele has done its bit for cabinet flaps and lift systems, slide fittings for kitchen, bathroom and office applications by its

recent acquisition of the Huwil range, amongst which there are three electric-powered flap systems.

Office furniture specialist Anton Schneider has launched the 'Variofix' office cabinet system assembly bolt. The main advantages are automated insertion during carcass production, the reduction to one type in the number of different screw fixtures and process-optimised assembly requiring no tools, including in bonded carcasses. All the system components required for the Variant S+ are already incorporated and ready to receive the Variofix bolts. At ZOW the Schneider team will not only exhibit the new Variofix assembly bolts but the entire range of Variant fittings with organisational accessories.

page 79

Kesseböhmer: SIMPLE ASSEMBLY

The automatic opening system manufactured by Kesseböhmer has set a high standard, not just because the door can be opened for easy access by a slight finger shove: installation of the mechanism is unusually straightforward and simple and also suitable for retro-fit. For example, the when installed in a 'Dispensa' larder cupboard, all that is needed is an 18 mm drill hole for the electric cable, four screws to attach the electric motor, and a clip-fit front adapter.

The assembly is simplicity in itself with a clip-fit sensor and the electric motor screwed to the base with the electric cable fed through to the 18 mm hole or through the base to the 220/230 V plug and socket.

Kesseböhmer says that Touch Control is suited for retrofit to the Dispensa VWS larder cupboard full travel drawer system. Kitchen manufacturers and retailers are free to use the system or not as required by the individual customer.

The manufacturer also says that Tough Control is suitable for retrofit to cupboards that are not usually equipped with electrical opening systems. Because the front requires no buffer or travel to activate the motion, Touch Control

closes accurately from top to bottom and is thus ideal for larder fronts with a surrounding lip seal. Also, the entire front responds to a gentle knock; so the user does not have to remember any particular activation zone.

page 80

Peka System:

CONVENIENCE & ERGONOMICS

The Swiss are well known for their combination of attention to detail, functionality and first-rate design. Peka System has sustained that accolade by winning the '2009 red dot design award', the 'Interzum Award 2009' and gaining a nomination for the '2010 German Design Prize'.

Next on the list for presentation at the forthcoming ZOW in Bad Salzflufen is the Peka 'Samba' kitchen waste disposal system. Studies have shown that in 70 percent of cases the bin only needs to be kept open for the briefest period for the disposal of small items. So Peka designed the foot-pedal operated quick-open system, which briefly tilts the front open and then self-closes quietly and automatically. If the waste disposal operation takes somewhat longer, the front can be held tilted open but causing the minimum obstruction. There is a third 'full-access' position providing optimum access to the bin, utensils and small containers. The tilted front leaves the user with the perception of plenty of space. The internal space is subdivided into one zone for waste and another for individual requirements. The system has a 40-litre bin, a transparent supplementary container and two additional containers that hang behind the bin.

The 'Pegasus' is another highlight that will be seen at ZOW, a new lift system with a centrally located lever-lift fitting that maximises ergonomic and user convenience. The shelf can be lowered to eye-height, easily bringing the upper-level cupboard contents within reach and maximising the use of available space. The height-adjustable 'Arena' tray-shelf has an invisible anti-slip

coating and is made for 900 to 1200 mm cupboards and the telescopic fitting is suitable for cupboards 680 to 920 high. A hand wheel fitted to a swing arm adjusts for the load factor.

page 80

Erform: MORE SERVICE

Erform has extended its range of services both to the furniture industry and contract furnishing sectors, which can now obtain high-gloss furniture fronts to special time-tied batch order. The company has been producing high-gloss finish on a range of materials since 2001. It has decades of experience in the application of post-forming mantles with total absence of edge seams for the manufacture of high quality furniture components; customers can incorporate the Erform components into their own products without the slightest additional work operation. Erform can satisfy virtually any design requirement – and has no less than 400 up-to-date decors available ex-stock. All this combined with short delivery times, pre-sorted to customer requirement, components polished if required, labelled and foil-wrapped, enables Erform customers to meet a wide range of special requirements. All the process operations – including coating right through to the completion of a component ready for installation – are all undertaken in-house in accordance with the certified quality and environmental management systems ISO 9001 and ISO 14001.

page 82

SURFACE MATERIALS

STUDY 2010:

TOMORROW'S FURNITURE

Ever since Kaindl installed a Bürkle digital print press in Salzburg there has been a heated debate about the individual design options opened up by this new technology. So how, exactly, does digital printing work; and for what size product is it suitable? But also very importantly, which manufacturer can supply what system? Furniture industry publisher Ferdinand Holzmann Verlag of

Hamburg has produced a study of the latest in surface materials that also takes a close look at digital printing. In addition to describing the range of individual processes, the study describes and lists the respective machinery. It also describes the first furniture industry applications, and lists the suppliers who print on furniture components.

In addition to digital print there are naturally a wide range of surface treatment processes and materials in which there have been recent technical advances, in particular paint and lacquer. The latest VOC environmental pollution regulations have forced furniture manufacturers to reconsider their approach, not just from the point of view of spray processes, but also by the spray equipment manufacturers who have had to redesign their spray shop equipment to keep solvent emissions below the legal maximum. The key technical development has been the introduction of water-based paint systems, whose latest products are now virtually as good as those produced by solvent-based products. A study was made of the conversion process to water-based systems with a close look at the changes made by Jenniches Treppen and Gruber+Schlager. The Holzmann publication includes a comprehensive overview of the latest systems, reading of which shows that water-based systems are here to stay. If you would like more information or a copy of the study, contact Ingeborg Kuhse.

Phone: 0049-040 - 714 00 173,

E-mail: ingeborg.kuhse@holzmann.de.

page 86+87

**Holz-Handwerk Fair:
ENTRY-LEVEL MACHINERY**

On 24 March the two-yearly twin fairs open in Nuremberg: Holz-Handwerk (Carpentry and Joinery) and Fensterbau/Frontale (Window Manufacture/Fronts). The last events of this kind were held in 2008 when the general business climate was very good and there was little sign of the economic turmoil to follow. The

fair organisers then logged a total of 102,881 trade visitors for the two fairs – slightly up on the more than 100,000 recorded in 2006. The 2008 Nuremberg fairs had 1,276 exhibitors from 34 countries.

In 2008 nine out of ten exhibitors reported they had generated new business links, and four out of ten Window/Frontal manufacturers and six out of ten Joinery/Carpentry exhibitors signed firm sales contracts at the fair. Virtually all the exhibitors were able to meet their leading customers during the course of the fair.

In contrast to the industrial woodworking machinery trade fairs such as Ligna and Xylexpo, large numbers of carpenters, joiners and cabinet makers are attracted to Nuremberg because the main emphasis is upon smaller hand-operated tools and technical publications. But of course the manufacturers of large woodworking machinery are also on hand to demonstrate entry-level CNC machinery.

The forthcoming dual event has all the signs of success and there is a surprisingly big demand for trade stands from many sectors, which seems to dismiss the suggestion of a continued economic crisis. For the visitors it looks as if there will once again be a large and comprehensive variety of new and innovative products on show. There is no doubt that the trade products at Holz-Handwerk 2010 will stand comparison: woodworking machinery, electrical and pneumatic tools, hand tools, grinding machinery and polishing agents, surface finishing technology, software and organisation, waste disposal, fixtures, fittings, hinges, building components, semi-finished components, systems for furniture and interior completion, wood, wood-based materials, and other materials; just about anything you might want. During the four days of the fair the 'Vector' forum will feature live presentations of the many new products to be seen for the first time. For example, Weber

Maschinen will demonstrate the Weber LCE-Compact series of machinery that covers many requirements of craft-level customers to deliver first-class polishing and sanding results within a confined space. The LCE-Compact has an operating width of 1100 and 1350 mm and can be supplied as a single- or twin-belt machine. It looks very much like the successful Weber KSF and Weber-LCE units and employs the same successful technology with wide-band station, contact drum, combi-station and grinding cushion.

The Nuremberg fair is also seen by Blum as an important event: Markus Blaser is the Blum manager for sales to German craft businesses: "There is no better way to reach German craft businesses than here in Nuremberg. This year we plan to focus on reducing unnecessary movement around the kitchen. This will include such products as electrically-operated flap mechanisms."

Last year Venjakob showed three new machines at Ligna, since when it has invested much effort in further development of the 'Ven Spray Smart', a new flat area spray unit. The compact yet effective standalone design was conceived to meet rapidly changing production requirements and is equally suitable for water- and solvent-based paints. In addition to the Ven Spray Smart, the Westphalian company will show the Ven Flow Coat automatic coating machine and the Ven Brush Hybrid brush-sander.

page 88-90

VDMA: ECONOMIC RIPPLES THROUGH 2010

When looking back at the boom years of 2007 and 2008, tears will come to the eyes of many woodworking machinery manufacturers, who were hit full force by the global finance crisis; a 40 per cent drop in turnover was not at all unusual. The editor of *möbelfertigung* discussed the current situation with Dr. Bernhard Dirr, chief executive of the

woodworking section of the VDMA Association of German Machinery Manufacturers, who outlined the consequences for his members and their expectations for 2010.

möbelfertigung: Dr. Dirr, last year was a very difficult one for your members. What is the current position?

Dr. Bernhard Dirr: So far, we have not got the figures for December 2009. But I am pretty certain that our previous forecast of a drop in turnover of 35 to 45 percent will be roughly correct.

Even though we may have passed through the worst, sales continue at a very low level. In each of the last quarters we recorded a slight improvement, so the worst is probably behind us. However, it is too early to speak of sustained recovery. Many businesses will continue to suffer the consequences of last year's crisis undiminished throughout 2010.

One must bear in mind that so far, many of the companies who suffered a drop in turnover of 40 to 50 percent only cut very few jobs. So now they are carrying the heavy burden of too many people. We do not know for how long they will be able to do so, or whether they will be obliged to take painful action.

möbelfertigung: Can you estimate when recovery might start?

Dr. Bernhard Dirr: We have to work on the assumption that sales will not recover to the level of the boom in 2007 and 2008 within the next two to three years, though there will be differences between the various sectors. In the last few years we benefited from above-average worldwide growth in the building and timber industries. There is little doubt that in some regions the investment was mismatched with the real requirement. In the past few months we have witnessed a cautious recovery. However, if this slow recovery is to generate sufficient demand to help us up from our present low level, we will need to see action from a number of important economic drivers in

Western Europe, the USA – not just in the timber industry – also in Russia and other East European countries. Unfortunately, so far we have not seen any substantial improvement.

möbelfertigung: Are there any markets in which business has recovered to a satisfactory level?

Dr. Bernhard Dirr: No. So far, we have been unable to discern any such emerging pattern. When orders come, they are pinpoint, and without any indication that a particular region or segment is on the way up. At present, the German market and neighbouring countries are doing than the others, in particular the craft joinery, carpentry and cabinet-makers; so we are feeling optimistic about the outcome of the Nuremberg Holz-Handwerk fair. In Germany, Austria and Switzerland our best customers are those who are closely involved with building renovation, for example window frame manufacturers. They are making appreciable investment in new production machinery.

The people who have been hit worst are the sawmills and board manufacturers, who also make furniture or building components. In some countries turnover is down by two-thirds, though we have seen a few new orders since last September.

möbelfertigung: Has the Association itself been hit by the international finance crisis? Have any of your members got into serious difficulties?

Dr. Bernhard Dirr: So far the Association has been generally undamaged; there was the odd resignation for reasons of cost or because a firm became insolvent; but this was balanced by new small-member firms. On the positive side, we can do a lot for our members in critical times such as this, especially when it comes to difficult negotiations with the banks or other financial matters. No doubt there will be a number of firms that will have to fight off insolvency during the course of

this year. As I mentioned before, many firms are still carrying the burden of excess labour. That problem has not yet been solved.

möbelfertigung: What was the main problem during this financial crisis?

Dr. Bernhard Dirr: Well, I do not say that we have yet overcome the finance crisis; many countries are still in the thick of it and uncertainty leads a continued disinclination to invest.

As far as machinery manufacture is concerned, last year's economic trough produced an extremely rapid and sharp decline in incoming orders; to a greater extent than ever witnessed before in a business that is prone to economic ups and downs. Nobody had enough time for remedial action. Just you try to manage a company that suddenly suffers a 50 percent cut in orders; that is nothing less than brutal.

Many of our members work to industries that are strongly dependent upon the building industry, which came to an abrupt stop in North America, Eastern Europe and other Western European countries. There was suddenly enormous overcapacity in for example sawmills and the floorboard industries. It became and remains difficult to drum up finance for new projects.

möbelfertigung: What advice have you given to member companies?

Dr. Bernhard Dirr: Very obviously, we advise all members to reduce costs wherever they can and maintain company liquidity as their first priorities. Otherwise, our member companies believe that innovation is and will remain their main strength. They are using this period of low sales to embark upon intensive research and development. This will in turn trigger future investment, identify cost savings, create new and optimised production processes. In turn this will put machinery customers in a position to make the new products that drive up demand. The name of the game is to manufacture

products that are more individual, lighter and lower cost.

möbelfertigung: The Ligna trade fair is now six months behind us; what did you think of it?

Dr. Bernhard Dirr: Given that it was held right in the eye of an economic storm that was raging all about us, Ligna 2009 was a really good fair which generated much support from trade visitors. Immediately following the fair, the resulting German business in May/June was valuable, but was otherwise poor. But it is too much to expect that a trade fair held during the middle of an international business crisis could turn things around.

möbelfertigung: Since we are talking about trade fairs, it looks as if there is to be a real parting of trade fair ways in Italy. In the left corner we have the traditional Xylexpo in May, while in the right corner we have Rimini beating the drum for their fair in April. What's your opinion?

Dr. Bernhard Dirr: Although it has shrunk, Xylexpo is the most important fair in one of our top markets. Also, it is the second most important international trade fair for our industry. Given the present situation, our industry certainly does not need a second regional trade fair in Italy, whose primary justification will be to cut costs for a few Italian competitors.

möbelfertigung: In which direction do you advise your members to think and plan?

Dr. Bernhard Dirr: There are many sides to the efficient use of resources, and this will doubtless be an important consideration for many manufacturers. Here, German know-how is at a high technical level and gives our manufacturers key advantages.

Another area is that of customer services for machinery hardware, obviously of great importance when considering complex plant and machinery. Thank God, customers now generally accept that if it is to perform to its full

potential, advanced high value machinery requires individual advice and guidance, proper training, software and maintenance. Naturally, these services must come at a price.

möbelfertigung: What's your forecast for 2010?

Dr. Bernhard Dirr: At the moment it is difficult to forecast what the sales turnover will be for 2010; we will have to wait for that. However, there is little doubt that it will be a difficult year for many businesses even though we anticipate a slight recovery in many markets. There will be an increase in turnover, just because of the base effect. But in the medium- to long-term I see us as being winners. Wood is a renewable raw material and will continue to gain in importance. We will contribute to this in no small measure with German technology and machines.

page 92

Homag: BRILLIANT HISTORY OF SUCCESS

Fifty years ago this month Gerhard Schuler and Eugen Hornberger set up a new small firm to manufacture woodworking machinery; from these small beginnings Homag grew to become a mighty player in the international machinery market. The corporation now has an estimated world market share of 25 per cent and about 5,000 employees; since 2007 Homag Group AG has been quoted on the stock exchange.

Homag's first 2,000 m² factory was built at Schopfloch – still the headquarters -- since when it has put up another 35 buildings. The headquarters has now grown to more than 60,000 m² production and office space. However, much of the growth was achieved by carefully targeted acquisition of other companies having complementary goods and services. Homag machinery is primarily used for the manufacture of furniture, building components such as windows, floorboards, stairs and prefabricated wooden houses.

The company has a long history of inventions – such as the

first edge-banding hot/cold adhesive application machine – that attracted worldwide interest, so early on Homag decided on an international sales strategy.

The company began to develop a dense network of sales and service outlets in the early 1970s, plus a number of exclusive agencies in every leading sales region. The Homag Group now has more than 22 sales and service subsidiaries operating with 60 exclusive sales agencies. The now Group has 16 factories, of which five are outside Germany. In addition to Spain and the USA the corporation focuses on fast-developing markets in South America, Asia and Eastern Europe where they produce mainly standard machines to meet the respective regional requirements. Thanks to its emphasis on international sales, 80 percent of Homag turnover is outside Germany, though machinery and equipment is now exported to more than 100 countries.

The company has always placed great emphasis on its relationship to the work force and in 1974 workers to become shareholders and co-owners. The highly qualified and motivated work force, combined with a clear strategic direction, has ensured that Homag's 50-year track record of success is likely to continue.

page 96

Leitz: QUIET AND EFFICIENT

Excessive noise at the workplace is a significant threat to health and safety and this is a problem that Leitz has decided to tackle with a range of innovative products. With an eye to processes that generate high noise levels the company has designed a new range of tools with greatly reduced noise emissions. The LowNoise 'Diamaster WhisperCut' has a diamond cutter for adhesive edge banding machines; it reduces noise emissions by up to five decibels and is almost half the weight of earlier machinery. The result is better working conditions, which when combined with lighter weight reduces mechanical wear

and improves the quality of the cutting action. Another advantage is that the diamond-cutting tool is interchangeable and can be sharpened, reducing the long-term costs. In addition, the tool core can be re-used several times.

The Diamaster WhisperCut incorporates well-tried DFC technology that ejects more than 95 percent of the swarf, making it a highly efficient tool that will quickly repay its purchase cost many times over. The group is a leading manufacturer of precision tools for woodworking and plastics processing and operates as a manufacturing service provider in more than 100 countries, with nine manufacturing and 34 sales subsidiaries backed by a worldwide network of some 200 service stations. The product spectrum embraces a complete range of machine-powered precision tools designed for solid wood, wood-based materials and plastic. In addition Leitz operates a comprehensive consultancy and provides services based on a 130-year history in the business.

page 96

Homag: PERFECT UNIT

How to create a perfect seamless join between edge banding and board? The answer is Homag's patented 'Lasertec', which makes the join using an oscillating laser beam to melt an ultra-thin layer of adhesive on the edge banding. Because the laser-activated layer is a special polymer pre-positioned on the edge banding, no additional adhesive is required. No heat-up period is needed, so the machine is always ready for instant action. The Lasertec eliminates unproductive waiting periods and the need to swap the adhesive container prior to a colour change. Because there is no need for any other adhesive, the process calls for fewer materials and does without the usual logistics.

Another advantage is that workpieces are not soiled by excess adhesive; far less cleaning is required of the downstream

tools and machinery, with less down-time. The functional layer and décor material are of identical colour, guaranteeing a totally seamless transition between the two. The bottom line is that the Lasertec process combines much better productivity with greater process reliability and high product quality.

page 97

Pollmeier: NEW IDEAS IN HARDWARE

Based at Hövelhof in Germany, Pollmeier Baugruppentechnik has made a name for itself with the manufacture of hardware fittings to special requirement. This medium-sized firm sees itself as an innovative partner in meeting customer-specific requirements by designing and manufacturing custom-built hardware fittings. One quarter of Pollmeier's technical team consists of professional engineers with high-level skills.

The company operates as the general contractor for the entire process, from initial design and development, through to prototypes and toolmaking. In addition to the in-house quality testing, Pollmeier also works in conjunction with well-known independent test institutes, plus leading universities in Germany and other countries.

Recently Pollmeier was asked by a kitchen manufacturer to design the first hardware fitting for a wall-mounted lower cabinet with drawers. Working with Paderborn University, in a few weeks Pollmeier came up with a fitting rated to carry a 300 kg load. One advantage is that assembly time is reduced to an absolute minimum because there is no requirement for expensive pre-construction. Another Pollmeier service is a customer advice hotline to help customers select the right plug fitting for the wall in question.

page 98

Häfele: NO HOLDS BARRED

A few weeks after kitchen hardware manufacturer Häfele

acquired Huwil's interests in flap door mechanisms, Häfele has published a new 30-page glossy brochure with an overview of all the currents systems under the heading: 'The right flap for every cabinet.'

The combined range of Häfele/Huwil mechanisms has something to suit virtually any and every type of kitchen cabinet installation and flap-action: fold-up, swing-up, swivel up or straight lift. The flap hardware systems described in the brochure come under the trade names 'Duo', 'Maxi', 'Free', 'Senso', 'Verso' and 'Strato', and are rounded off by a range of struts and support hardware. They are all adaptable to individual situations and the range covers all standard flap sizes and weights.

The electrical opening and closing systems are a fascinating solution and are designed for push-fit installation by a carpenter or interior completions worker. Häfele has three electrically powered flap systems in the range: the 'E-Senso 3686' is for two-part upward-folding wooden flaps; the 'E-Verso 3687' swings the one-piece flap upwards; while the 'E-Strato 3688' is an elegant front lift-mechanism. All these electrical hardware systems are supplied as a complete set of components and are suitable for use with wooden fronts or other materials with an aluminium frame. They move automatically in response to a radio signal from a touch button countersunk in a 35 mm hole located anywhere convenient in the cabinet.

page 98

Imos: NEW SOFTWARE

After its appearance at ZOW in Bad Salzufflen, Imos Ag will follow up with a stand at Holz-Handwerk in Nuremberg. The Herford-based software development team will use these two important trade fairs to demonstrate their latest programs to a wide range of furniture manufacturers and interior completion

businesses. The head of Imos sales Rainer Glöckle said: "We get our best pointers to new market demands by being right there alongside our customers."

The main emphasis is now on further optimisation of Imos 9.0 software tools for CAD-/CAM manufacture. The carefully structured and uniform data feed results in virtually faultless process operation from planning to production. Imos differentiates between carpenters, contract furnishing and industry in order to provide a custom-built system meeting the requirements for each type of customer.

The second main area of interest is the internet-based sales and distribution system 'Imos Net'. The online system extends from planning through design to presentation and calculation, followed by immediate follow-on to the production stage. At both fairs Imos will use attractive audio-visual systems to describe the many option available through the 'Imos Net'.

page 99

IMA: INDIVIDUAL CUT

The furniture industry is faced with increasing demands from customers for individually-made products, and this in turn puts pressure on machinery manufacturers to come up with suitable answers – such as the flexible high-performance board component cutters from IMA Klessmann. Not only does this machine cut right-angled pieces; it can also cut any shape imaginable without any problem. The machine is controlled by Bima-cut Editor software, which ensures minimum wastage, takes account of the direction of wood grain or décor, and keeps a log of residues suitable for further use.

The machine has powerful routing spindles, precision spindle bearings and operates at high speeds, all of which deliver highest-quality cuts. The wooden components are then at once ready for the next stage without any further finishing process.

Removal from the machine of board residues and presentation of the next uncut board is effected via a feed portal. This happens at the moment the machine makes the last cut in the preceding board.

When components have been cut, they are lifted from the large-format board by routers, thereby greatly reducing the time required solely for routing. A removal portal takes them off while the first components are cut from the next incoming board. The Bima Cutting Center is directly linked to the next stage edge-finishing station via conveyer belts and roller tracks to achieve maximum efficiency.

page 101

Riepe: QUALITY FINISH

Based at Bünde in Germany, the Riepe company has developed and manufactured a range of electronically controlled paint spray systems and the associated chemical products for the woodworking industries. Thanks to its many years of R&D experience, Riepe is in a good position to produce finish-quality furniture edges using special technologies and innovative processes that achieve optimum results. Another advantage is that the Riepe system will raise production to the latest ultra cost-efficient status. Operating in conjunction with the chemical agents supplied by Riepe, the spray equipment requires zero maintenance – as confirmed by Riepe's many years of experience in this sector. In addition, a furniture manufacturer need have no reservations about the direct application of lacquer to the product.

If, following application of plastic or veneer edge-banding, adhesive leaking from the seam is singularly unattractive. Such residues quickly attach themselves to the workpiece and removal is a time-consuming manual task. However, the Riepe spray system ensures that absolutely no adhesive remains on

the workpiece edge, with the necessary separation agents, lubricants, anti-static, cooling and cleaning agents all made by Riepe. Working with leading manufacturers of machinery, edge-banding and adhesives, Riepe constantly adjusts its products to the latest standard. In particular, the use of innovative spray systems combined with specialist Riepe chemical agents guarantees that the entire work process is efficient. For some time their products have been sold through a worldwide dealer network, so original products are available throughout Europe and elsewhere.

page 102

**Xylexpo 2010:
700 EXHIBITRS EXPECTED**

Preparations are in fully swing for the next Xylexpo trade fair, which takes place from 4 to 8 May. The event has also been given a boost by recent news from industry that business is now beginning to recover and the end of the economic crisis is in sight. This belief is supported by evidence including many new bookings taken in recent weeks for space at the Fair. In addition, Xylexpo has recorded a surge of interest and enquiries for semi-finished products.

So far, 400 companies have reserved more than 30,000

square metres net exhibition space at the international bi-annual event for technology, materials, components, and semi-finished products for the furniture woodworking industries. The organisers of this major Milan event predict that when the Fair opens on 4 May there will be more than 700 exhibitors occupying 60,000 square metres net exhibition space.

This year there will be particular emphasis at Xylexpo on semi-finished products, underlining determination to extend the range of products and differentiate the fair from other national and international events in the interests of trade visitors. In 2008 almost 300 exhibitors and 51.5 percent of the more than 82,000 visitors were from other countries.

On 30 October 2009 the organisers of Xylexpo signed an agreement with the Milan Fair for a repeat event in 2012, confirming the way forward and enhancing the planning horizon for both exhibitors and visitors.

This year's guests can also look forward to the latest project, "The forest in the fair", a cooperative project with the Region of Lombardy. The objective is to focus on everything that is associated with woods and forests by erecting a real forest within the exhibition hall with footpaths

leading towards anything with a relationship with wood. This embraces everything that the region has to offer in terms of craft products, regional culture, cutting and shaping technologies, forestry work, first-stage machinery and accessories. Of course, the display also includes ecological aspects. This special show will remain open until 9 May.

Items in the High-Tech Arena will certainly attract much attention during the five-day fair, where there will be a kind of 'Wood University' consisting of businesses, planners, users, public authorities and research institutes; here they will present and debate their latest projects and products.

page 104

**Furnica Poznan: FURNITURE
FACTORY LIVE DEMO**

Make sure that Furnica is in the diary, the Poznan international trade fair for furniture production, materials and components will be held in Poland from 13 to 16 April. Here, visitors will have access to the entire furniture industry value added chain – right through from the initial supply of materials and components to the finished furniture. This year the main focus will be on upholstery manufacture.

Hanna Ochnik-Pawlowska is Furnica's project manager: "Upholstery represents an important part of the Polish furniture industry, which is always looking for innovation and ideas for forward-looking products. That is why those of our exhibitors who specialise in upholstery and kitchen furniture prefer to exhibit in the 'four-pack', the modern MTP exhibition halls in Pavilion 8A.

The on-site Furniture Factory will doubtless be a major show highlight; this is a unique, live equipment demonstration in which machinery manufacturers build new solid wood furniture using standard machines, tools and components.

Kitchen furniture manufacture accessories will be a further high point at Furnica, with showpiece high-quality products on display by famous international kitchen manufacturers. There will be exciting seminars and a special area to demonstrate the latest kitchen manufacturing techniques. In order to make it easy for intending exhibitors, the organisers have prepared an all-in one low-cost package for a pre-equipped stand erected and ready to go; all the exhibitor has to do is to turn up with his products and stand decoration.

IMPRESSUM

möbelfertigung

**Ferdinand Holzmann
Verlag GmbH
Mexikoring 37
D-22297 Hamburg
Postfach 60 10 49
D-22210 Hamburg
Tel.: ++49 40/ 63 20 18-0
Fax: ++49 40/ 630 75 10
www.moebelfertigung.com**

publisher:
Jochen Holzmann
Jörn Holzmann

editorial team:

Stefan Müller
Tel.: ++49 40/63 20 18-53
stefan.mueller@holzmann.de
Tino Eggert
Tel.: ++49 40/63 20 18-31
tino.eggert@holzmann.de
Doris Bauer
doris.bauer@holzmann.de
Arnd Ziemer
arnd.ziemer@holzmann.de

translation:
Graham Clark, Bristol

advertising manager:

Hans-Christian Hahn
Tel.: ++49 40/63 20 18-39
hans-christian.hahn@holzmann.de

advertising administration:

Jasmin Loose
Tel.: ++49 40/63 20 18-41
jasmin.loose@holzmann.de

classified advertisement:

Sarah Albrecht
Tel.: ++49 40/ 63 20 18-22
sarah.albrecht@holzmann.de

editorial assistant:

Simone Raith
assistenz@holzmann.de

layout:

Bettina Koether
Kati Häbel

subscription:

Jeannine Konrad
Tel. ++49 40/ 63 20 18-57
jeannine.konrad@holzmann.de



FERDINAND HOLZMANN IHR MÖBEL-VERLAG