

REPORT

# 013

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# A LETTER from the Chairman

Dña. Pilar Vázquez



Dear members,

It's the end of another year and at ANFALUM we would like to start the next year with optimism. 2013 was a turning point: figures stopped declining and the economy showed modest signs of growth. We are certain that this growth will consolidate in the coming years.

This was reinforced by the great exporting efforts made by many of our companies and we congratulate them for that. The quality of our products, our extraordinary adaptation to the new technologies and the good service we always offer mean that lighting products from Spain are welcomed and valued virtually all around the world.

In order to support these efforts, ANFALUM created an International Department in 2013. Its mission is to provide information, help companies wishing to embark on the international market or broaden their presence around the world, look for institutional grants, assist in the creation of consortia and, in sum, support our members in whatever we can, as we always do.

Another important objective that kept us busy this year was maintaining our position as a leading institution in the field of lighting in Spain. To do that we encouraged new companies entering the market to join our ranks. Our doors are always open to companies

that abide by our code of conduct and meet the quality and professional standards that we are characterized by.

In that same vein the continuing training of stakeholders and the reporting of malpractice and products violating our regulations is the way in which we have kept non-compliant companies at bay.

As always we start the year with new projects, eager to work, open to suggestions and looking forward to the collaboration of all our members. Because you are our reason for being.

Regards,

We would like to start  
the next year with optimism

# A LETTER from the Director

D. Alfredo Berges



One more year I am happy to summarize the highlights of the year in our Annual Report and to share some thoughts with you about the situation of the lighting industry in Spain, which is represented by ANFALUM.

In 2013 we placed special importance on statistics, as they allow us to take the temperature of the sector. Looking at indicators we are able to say that for the first time since 2007 sales figures are showing signs of recovery as a whole (slightly above our 2012 figures). This gives us hope for 2014. If we stick to economic and short-term figures, the situation is stable, that is, there is little hope for things going up. However, allow me to focus more closely on trends and to take account of qualitative and environmental aspects, which can materialize in the coming years. Economic data in relation to lamps, components and indoor lights are encouraging. This trend can be

clearly applied to all other subsectors.

Another significant aspect is the increased relevance of LEDs in our sector, with a growth rate nearing 30% vs 2012 and a share of nearly 20% in total sales figures. This is consistent with the forecasts of experts, who estimate that LEDs will account for 37% of the market by 2016. It is difficult to find another technological event in the electrotechnical industry having caused such a stir in market variables in so little time.

Changes in product, production methods and distribution channels all at the same time are revolutionizing the world of lighting after more than 100 years. The speed of change causes some tensions that, despite being logical, should be taken into account. LEDs are in themselves different from traditional light sources, including incandescent light bulbs and discharge

lamps. Therefore, LED requirements in terms of manufacturing and safety are completely different, and this makes it possible to draw similarities.

With a steady technological development within a short period of time, a product that today has a useful life of 30 000 hours will be outperformed with greater benefits, longer lifecycles and unquestionably lower costs. The fast pace at which changes are occurring means that products are developing much faster than the regulations establishing new safety standards, electromagnetic compatibilities, manufacturing requirements, lighting parameters and efficiency rates. Where regulatory references do not exist, we rely on the qualifications of the producer, which will reflect on the quality of the end product. In such cases we expect the lighting characteristics of the end product to match a very long lifecycle.

In the case of goods for household use, it is particularly important to pay attention to certification labels and indications, as these will help us choose the most suitable solution.

In more professional sectors, projects will explicitly state their lighting and performance requirements, so that the appropriate lights can be chosen and installed ensuring optimal performance. We should take advantage of the market opportunities opened up by LEDs. If we do that the lighting industry will be positively impacted and short-term opportunists will be excluded from the market, since their products would eventually damage manufacturers who have invested in R+D+I and are good market players.

Contractual requirements in times of crisis have caused other agents to emerge, including energy services and electric companies covering the need to manage lighting systems by developing the project and amortizing it during the time of the contract, later returning updated installations with greater performance rates and clear energy saving parameters at the end of the contract. This financial vehicle brings advantages to our industry because it stimulates the market;

however, quality standards should always be assured. We must keep in mind that, in the medium and long run, good investments are conditional on goods coming from suppliers with full guarantees. It is also essential that products fit in a digitalized environment or in environments where interaction with other elements is needed.

At ANFALUM we support the SMART LIGHTING concept. We are thinking about how we can add more value to our sector and turn lighting into a part of the high-technology industry, by no longer focusing on the product alone, but also on installations and services.

On the other hand, we must continue to stress the benefits of foreign promotion amongst our companies. Our products are competitive all around the world and many of our members can vouch for that. In order to assist our members in their internationalization process ANFALUM is working vigorously on this area and we will redouble our efforts in this sense in the coming years.

As I was saying, the expertise we have gained in the Spanish market has enabled us to compete with businesses from other countries on an equal footing. We have proven that

we are fully competitive in terms of technology and service capacity. It is true that the crisis forced us to look for new markets, but it is also very true that ANFALUM members have put in much effort to position themselves in foreign markets displaying high quality standards and not only in relation to price. This will help us reactivate the existing companies and look for new opportunities to implement our initiatives in the future.

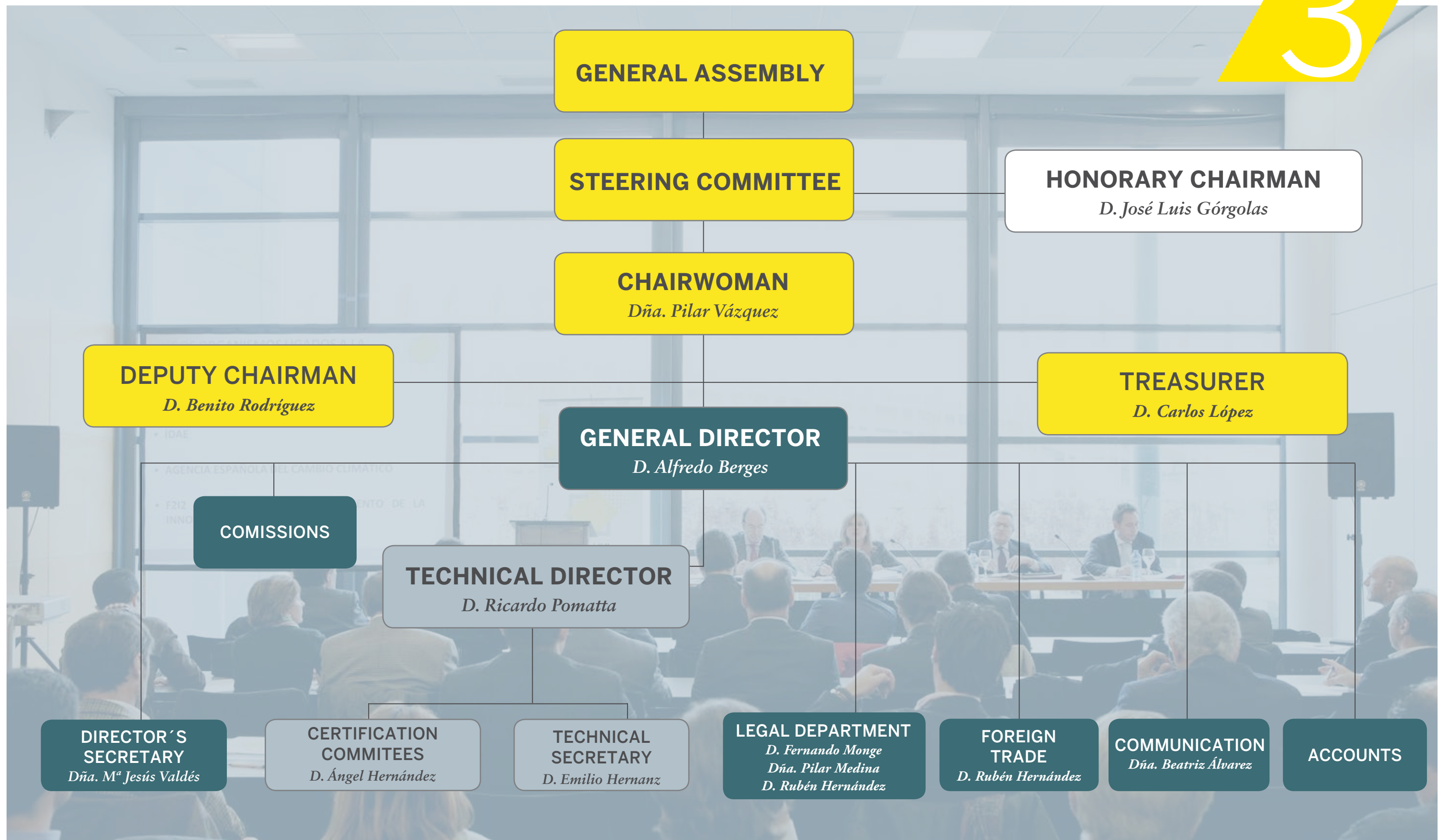
ANFALUM is promoting the refurbishing of buildings and infrastructures under the “20/20/20” targets. On the one hand, it will help Spain accomplish its goals within the EU context. And, on the other hand, it will stimulate our industry. In 2013, and despite all difficulties, our member companies continued to trust in us as an economic driving force and we are pleased to see that newly established, solvent companies entering the market wish to join ANFALUM to benefit from its more than 30 years of experience.

All that reinforces our idea that we should continue to develop our structure acquiring the means and resources that will allow us to promote the Spanish lighting sector, which is becoming ever more competitive, both nationally and internationally.



# ORGANIZATION Chart

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# STEERING COMMITTEE

## Comissions



### STEERING COMMITTEE

**CHAIRWOMAN**

*Dña. Pilar Vázquez*

**HONORARY CHAIRMAN**

*D. José Luis de Górgolas*

**DEPUTY CHAIRMAN**

*D. Benito Rodríguez*

**TREASURER**

*D. Carlos López*

**GENERAL DIRECTOR**

*D. Alfredo Berges*

**BOARD MEMBERS**

**EXTERIOR LIGHTING**

*Schreder Socelec S.A.- D. Carlos López*  
*C&G Carandini- Dña. Pilar Vázquez*

**INTERIOR LIGHTING**

*MARSET ILUMINACIÓN S.A. - D. Jesús Marset*  
*GRUPO LUXIONA S.L. - D. Xavier Tey, D. Javier Santafé*  
*ODEL LUX S.A. (GRUPO LLEDÓ) - D. Rafael Lledó*

**LAMPS**

*OSRAM S.A. - D. Benito Rodríguez*  
*PHILIPS IBÉRICA S.A. - D. Antonio Espada*

**COMPONENTS**

*RTR ENERGÍA, S.L. – D. Cesar Nuñez-Barranco*  
*BJB PROCESA, S.A. – D. Joaquín Bruned*

**EMERGENCY LIGHTS**

*ELECTRO ZEMPER, S.A. - D. Jesús María Espinosa*

**CORPORATE MEMBERS**

*ASEFACOL – D. Santiago Sanz*

### COMISIONES

**INSTITUTIONAL RELATIONS COMMISSION**

*Dña. Pilar Vázquez*

**MARKETING AND FOREIGN TRADE COMMISSION**

*D. Fabrizio Damiani*  
*D. Rubén Hernández*

**TECHNICAL AND MARKET INSPECTION COMMISSION**

*D. Ricardo Pomatta*

**ECONOMIC COMMISSION**

*D. Carlos López*

**ENVIRONMENT COMMISSION**

*D. Alfredo Berges*

**ETHICS COMMISSION**

*D. Jesús Marset*

# INSTITUTIONAL Relations

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Pilar Vázquez at the 2nd PMcM Summit

In 2013 ANFALUM was very active in the area of Institutional Relations. We continued to reinforce our contacts with the government and the public authorities, and strengthened our presence in society.

We must mention our contacts with the MINISTRY OF INDUSTRY, TOURISM AND TRADE through the Secretariat General for Industry, the Directorate General for SMEs and the Directorate General for Energy.

ANFALUM maintains regular contact with these authorities in order to keep abreast of the initiatives that are being implemented and that may be relevant to the lighting industry. ANFALUM also has contacts with the Directorate General for Foreign Trade, MINISTRY FOR ECONOMICS

AND COMPETITION, and has been recognized as a collaborating association.

With regards to foreign promotion, ANFALUM, in collaboration with the Institute for Foreign Trade (ICEX) is developing a foreign promotion plan in which our member companies will participate. The plan is aimed at entering foreign markets.

ANFALUM will also participate in a series of initiatives by ICEX, including "SMART CITIES", "Plan Integra", the Sectoral Plan for Energy Efficiency and a program for participating in international tenders. These new actions promoted by ICEX will surely bring many benefits to our companies. Our contacts with IDAE are also worth mentioning.

They are aimed at securing grants for energy efficiency projects in the field of lighting.

We are also in contact with the MINISTRY OF PUBLIC WORKS through both the Directorate General for Roads and the Directorate General for Housing and Architecture.

We are also in regular contact with the autonomous communities, including Madrid, Cataluña, País Vasco, Valencia and Andalucía. Through the regional departments, ANFALUM is able to obtain information about market opportunities for our member companies and promote its activities through conferences on topics such as LED-based technologies, energy efficiency, etc.



ANFALUM General Assembly, June 2013



Inercia alliance signatories

Our actions in collaboration with the Autonomous Community of Madrid are worth noting. ANFALUM started to implement an equipment renewal plan for emergency lights in this region in order to promote the use of self-testing technologies.

ANFALUM, through its Chairwoman, holds the office of vice-chair at the Multi-Sectoral Platform Against Late Payment Practices (PMcM). In 2013 PMcM held a summit to discuss actions against late payment practices. The Minister of the Treasury and the main political parties were present at this event. All of them expressed the opinion that payment terms should be shortened. This measure would have an immediate effect on competitiveness and the financial health of companies.

PMcM has outlined a penalization scheme for correcting legal violations and has also asked that provisions contrary to the Act to Fight Against Late Payment Practices be rewritten. Such provisions are found in laws dealing with employment matters and retail trade regulations.

ANFALUM plays a very important role at PMcM. Its involvement follows a request submitted by the lighting sector and other sectors within the Spanish economy suffering the direct consequences of deferred payments.

ANFALUM also signed an agreement with Fundación para el Fomento de la Innovación Industrial (F2I2) aimed at developing market inspection actions that will later have an effect on the application of safeguard clauses.

ANFALUM works very closely with AENOR and is part of its Standing Committee, its Governing Board, and AENOR Internacional.

We continue to be present at the governing bodies, commissions and working groups of CONFEMETAL, working in areas such as Energy, Environment, Employment Affairs, Economy and Finance.

We are also part of the Executive Committee and the Board of SERCOBE.

Finally, we maintain regular contact with AFME, FACEL and ADBEL in the electrotechnical industry.



# SECTOR Numbers



## INTRODUCTION

In 2013 the market remained at its 2012 level, the worst in the recession period that started in 2008. However, three sectors started to show signs of recovery in terms of demand (components, decorative lights and lighting sources). This softened the fairly slight 3% drop in demand vs 2012, with sales figures in the lighting sector reaching €1,100 million and demand rates below 41.50% vs 2007. However, it was the first time that a sector grew and not just in terms of exports. This situation also impacted all of the Eurozone economies. In our particular case two very positive aspects should be emphasized.

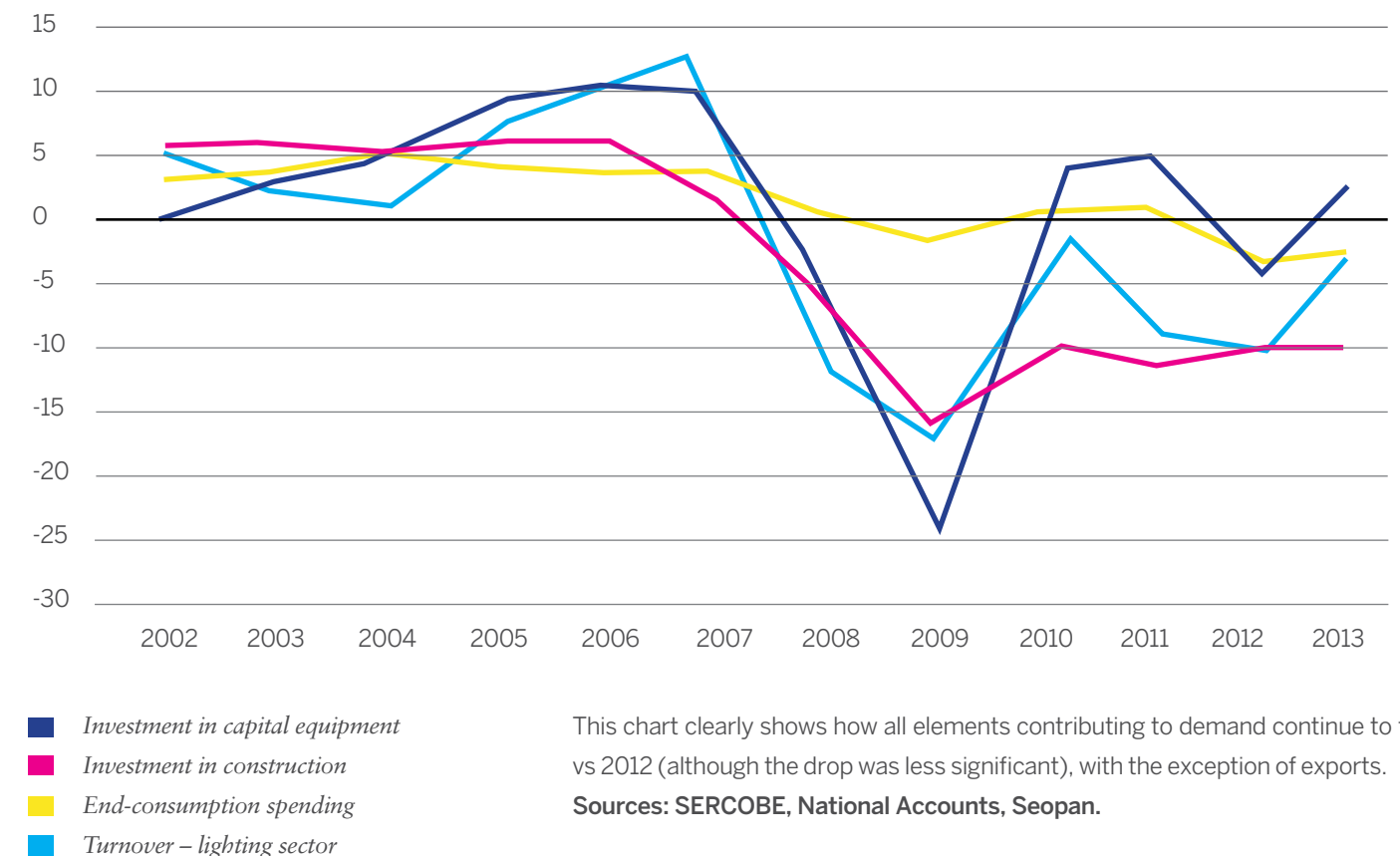
On the one hand, LED luminaries, both for indoor and outdoor use and their components, are consolidating their position vs 2012, with a considerable growth of 30%. This means a significant market share with a turnover of €190 million. As a result, LEDs are becoming a sector in their own right, having increased their market share by 18%.

On the other hand, exports remained on the rise and grew by 4%, thus consolidating the growth trend of 2012. Exports exceeded €350 million, accounting for 32% of the sales figures and offsetting the sharp drop in national demand registered in 2012.

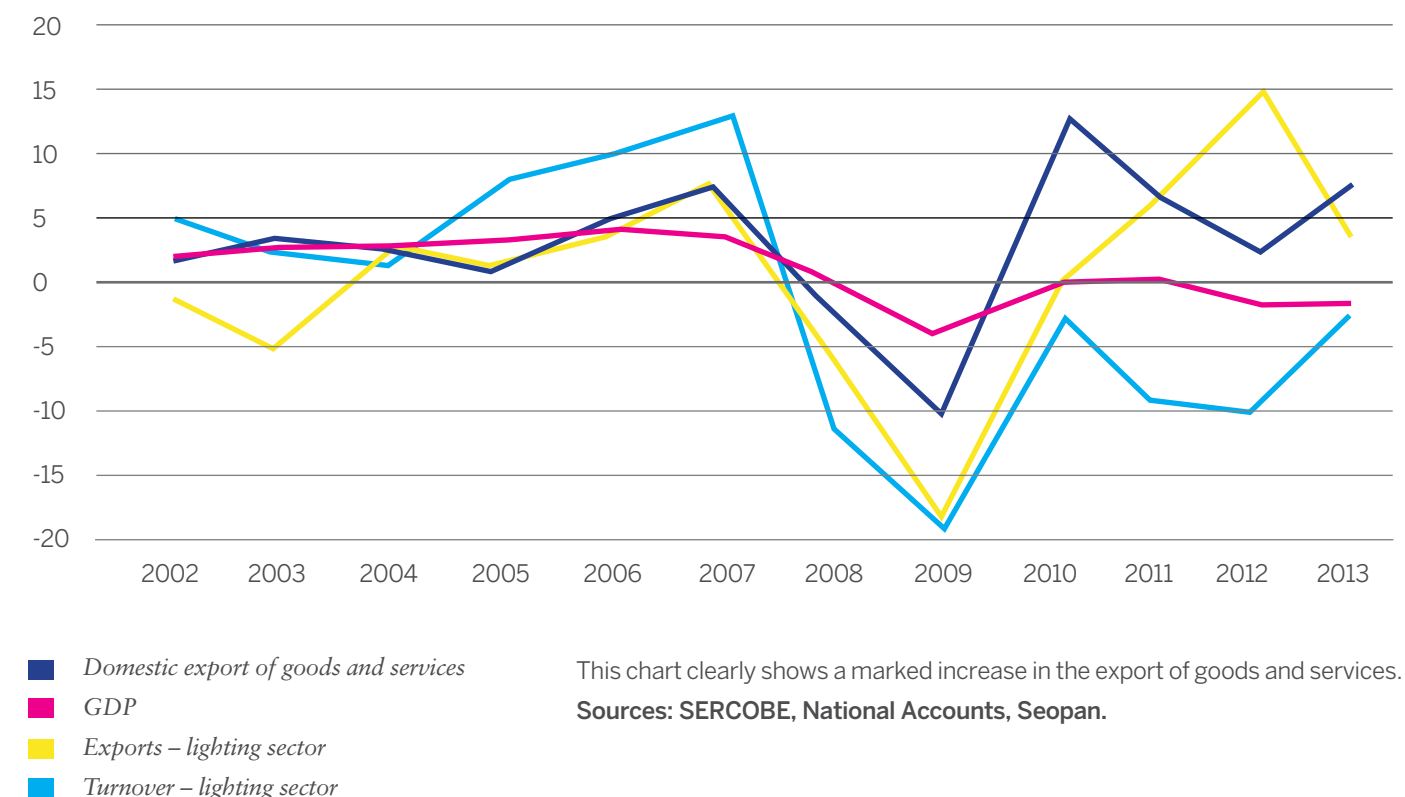
The lighting industry has been badly hit by the crisis. But the two facts explained above meant that 2013 ended with figures that, while low, enabled us to react by looking for growth, when possible, through both internationalization-- ever more consolidated amongst our partners-- and the implementation of new energy-efficient technologies.

ANFALUM is a great supporter of energy-efficient technologies and has organized multiple conference cycles to promote the Smart Cities concept. These technologies could also contain the downturn in consumption within the domestic market to a large extent.

## ANALYSIS OF THE NATIONAL ECONOMIC SITUATION

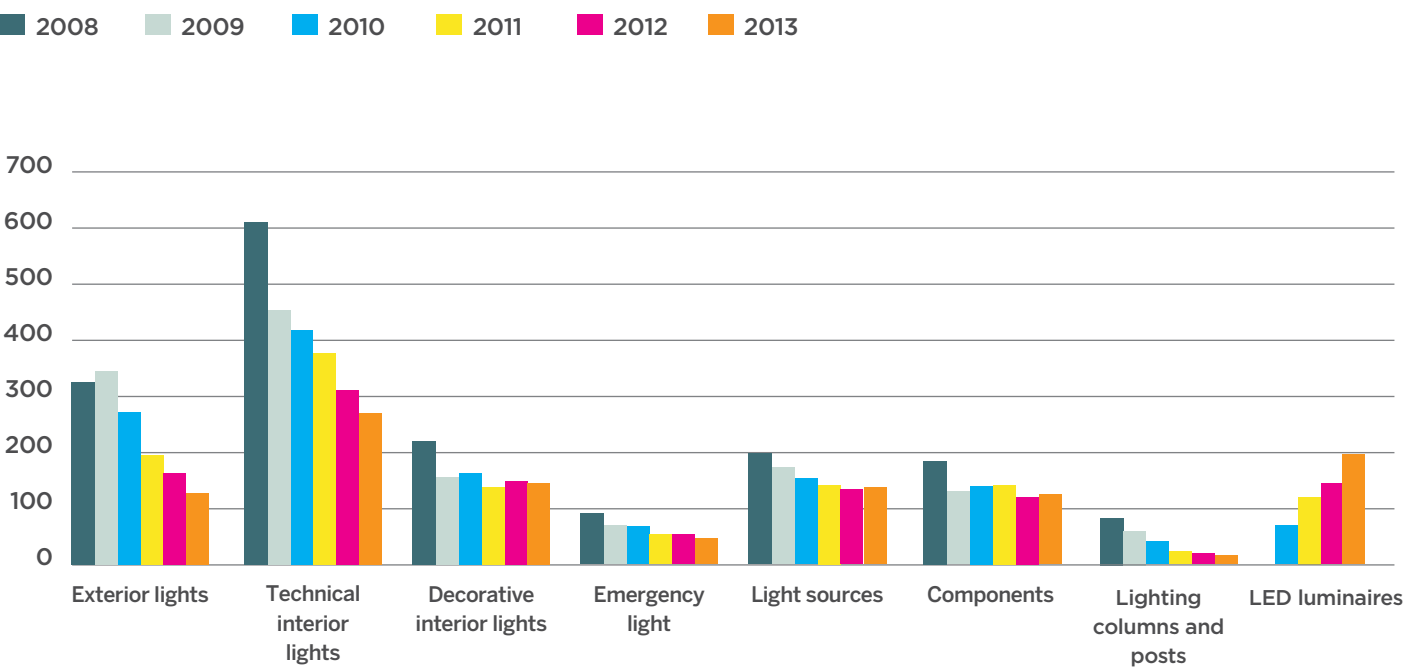


## COMPARATIVE ANALYSIS OF THE SECTOR





TURNOVER – LIGHTING INDUSTRY



Exports grew 4%  
and exceeded €350 million

Streetlights

In 2013 this important sector was not yet able to contain the overall fall in demand resulting from the lack of investment and the restrictions to structural investment. Despite improvements in exports in 2013, streetlights as a whole, including lighting columns, suffered a decrease of 12%, which aggravated the situation.

Technical interior lights

Technical interior lights accounted for the largest share in terms of turnover, but did not help to minimize

the drop in turnover in 2013. A sharp decrease was registered vs 2012 (15%), mainly as a result of private investment stagnation.

Positive trends in exports and contributions from new LED technologies (regulated and electronic) were not enough to make up for the fall. However, this segment remains the sector's backbone. Despite its poor health, it still accounts for over 30% of the total turnover in the market, therefore reaching a fundamental critical mass for the development and dynamics of the industry.

Light sources

This strategic sector has been hit hardly by the deepening recession. As a result of low export levels, 2013 closed with a slight growth of 0.3%, this being the first sector to show signs of growth in recent years.

Unlike other sectors, the small increase in domestic demand had a positive impact. Light sources grew as a result of the innovations brought by new technologies at energy efficiency and market evolution levels, particularly LEDs, which are key to the development of this sector that

has high-technology content and technological dynamism.

Components and lighting technology

The components and lighting technology sector showed signs of recovery for the first time, with a growth of 2.9% vs 2012. This was due in large part to positive figures in exports (4.7% growth) and domestic demand (1% growth). Just as for light sources, this sector is currently in the midst of a technological change, driven by both the dynamics of the new light sources and LEDs. This has unquestionably led

to tensions in the evolution of demand and had a negative impact. The new energy efficiency directives, which are being implemented throughout the EU, are not proving sufficient to encourage growth because of the lack of funds.

Decorative lights

This sector suffered the most in the past years, but managed to grow 0.1% in 2013 as a result of exports. Despite the obstacles posed by imports from the Far East and the fall in private demand, which was already evident all along 2013, demand remained constant.



# INTERNATIONALIZATION and Trade Fairs



Exports represent **32%** of the Association's turnover

## FOREIGN TRADE

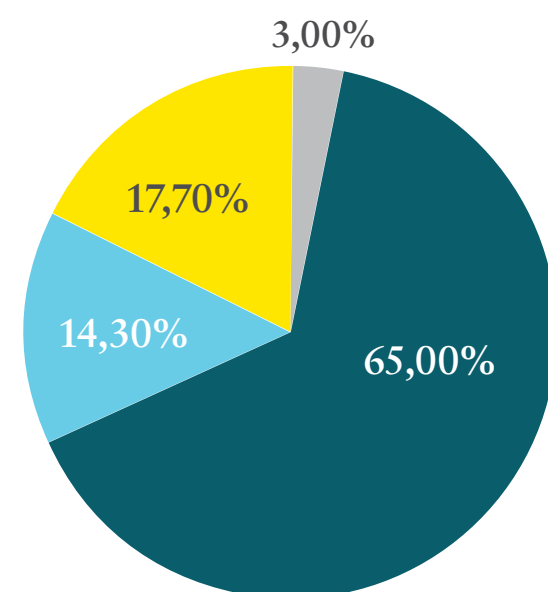
The statistical study made in October 2012 amongst Anfalum members showed that:

Almost all Anfalum members make exports and in 48 of them exporting is their main activity, exports accounting for more than 30% of their turnover;

Exports amounted to €350 million and represent 32% of the Association's turnover.

### GEOGRAPHICAL AREAS

- EU-27 and Rest of Europe
- Arab Countries and Lower Mediterranean
- Latin America
- Rest of World



In 2013 Anfalum attended only one international trade fair.

### INTERLIGHT MOSCOW 2013

#### Report and assessment

Anfalum had 5 exhibitors, 2 indirect exhibitors and 5 visiting companies.

The fair developed in much the same way as its latest edition, with a strong presence of customers from Russia, Ukraine and other areas under the influence of the Russian market and Eastern Europe. The show has consolidated as a major promotional platform for this market.

#### General opinion

Interlight Moscow offers interesting opportunities to companies because of the high quality of its visitors. Importers, prescribers and virtually all actors in the distribution chain are represented at the show, as well as public institutions and agencies, including municipal authorities and maintenance companies.

#### CONCLUSIONES

The cycle of uncertainty that closed 2012 led to a lagging recession in 2013 that nobody expected would continue or at least not as intensely after last year.

A more encouraging scenario started at the end of 2013, according to the qualified opinions of almost all international analysts, a view that I entirely share. For the first time not all sectors were experiencing a recessive phase and three very important sectors were up again. This opened a new cycle in the market at a time when the international economy is unquestionably bringing structural changes to our sector. These changes will lead to a new model, whose growth will be very much influenced by new technologies and new products, on the one hand, and by exports and the internationalization of trade relations, on the other hand.



# TECHNICAL ACTIVITIES and Market Inspection

## TECHNICAL COMMISSION

In 2013 the Technical Commission focused on issues related to energy efficiency. The Commission also continued to organize and participate in conferences. At the request of both our members and different authorities sessions on LED and energy efficiency were also held. Our presence in and involvement with international working groups in LIGHTING EUROPE played an important role during the year.

ANFALUM continued to work on its main action lines, which are:

- **Standardization and Certification**
- **Regulation and Working Groups**
- **LIGHTING EUROPE**

The Association manages and coordinates the participation of our experts in the CTN-205 Standardization Committee on “Luminaires, Lamps and Related Equipment”, which focuses on safety regulations; and the CTN-72 Standardization Committee on “Lighting and Color”, where lighting technology standards for luminaires are developed and prepared.

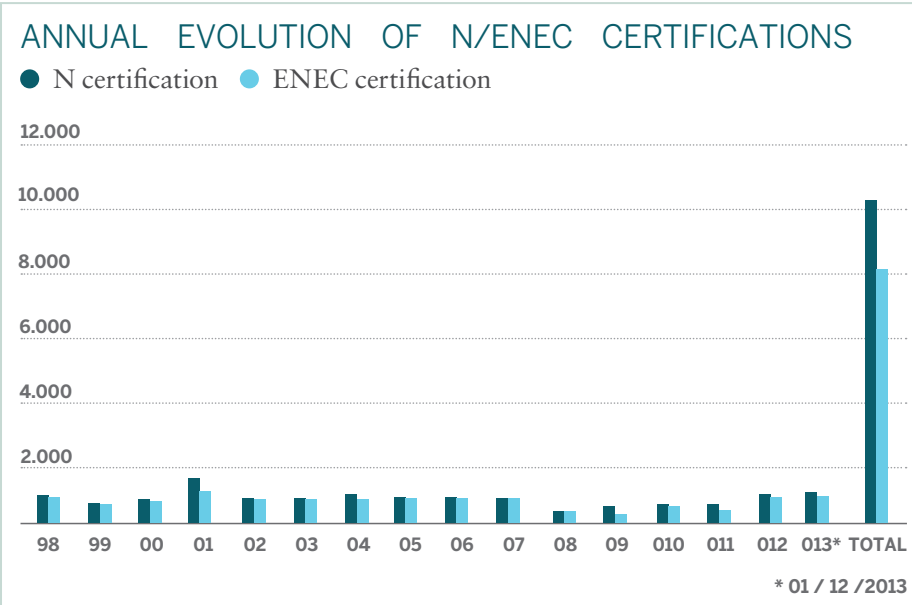
ANFALUM acts as secretary for the two Certification Committees by

delegation of AENOR. The current Secretary, Mr. Angel Hernández, will retire this year. Supported by the Technical Director and the administrative structure, ANFALUM will implement the relevant changes in the Secretariats of the Certification Committees that most concern our industry, namely, the CTC-007 Committee on “Luminaires, Lamps, Related Equipment and Capacitors”, and the CTC-019 Committee on “Lighting Supports”. These committees are responsible for granting the N and ENEC certifications for their respective

products as evidence of their quality and compliance with the applicable standards and directives.

The chart below shows the evolution of CTC-007 certifications. This Committee is the second most important in terms of optional certifications amongst all AENOR committees.

Given the importance of LED-based technologies, ANFALUM’s Technical Commission closely watched the evolution of not only this technology,



but also every aspect related to how it is regulated.

The Technical Commission entered a new stage by taking part in the working groups of ALIANZA INERCIA, leading a Smart Lighting working group. All smart lighting related activities will now be led by ANFALUM.

The working groups of the Technical Commission attended the technical meetings of LIGHTING EUROPE. The association meets regularly throughout the year. As the only Spanish representative, ANFALUM coordinates the participation of technicians from our member companies:

- **W.G. Market Surveillance**  
*Mr. Ricardo Pomatta*
- **W.G. Emergency Lighting**  
*Mr. Jesús María Espinosa*
- **W.G Smart Lighting**  
*Mr. Rafael Lledo*
- **W.G Energy Efficient Products**

*Mr. Rafael Lledo*

- **W.G Executive Board**  
*Mr. Alfredo Berges*
- **W.G Collection and Recycling**  
*Mr. Alfredo Berges (Chairman)*
- **W.G. LIGHTING EUROPE**  
**Coordinator**  
*Mr. Ricardo Pomatta*

ANFALUM continues to participate in the CEN-TC-50 meetings, where changes to EN-40 standards for posts and lighting columns are being discussed.

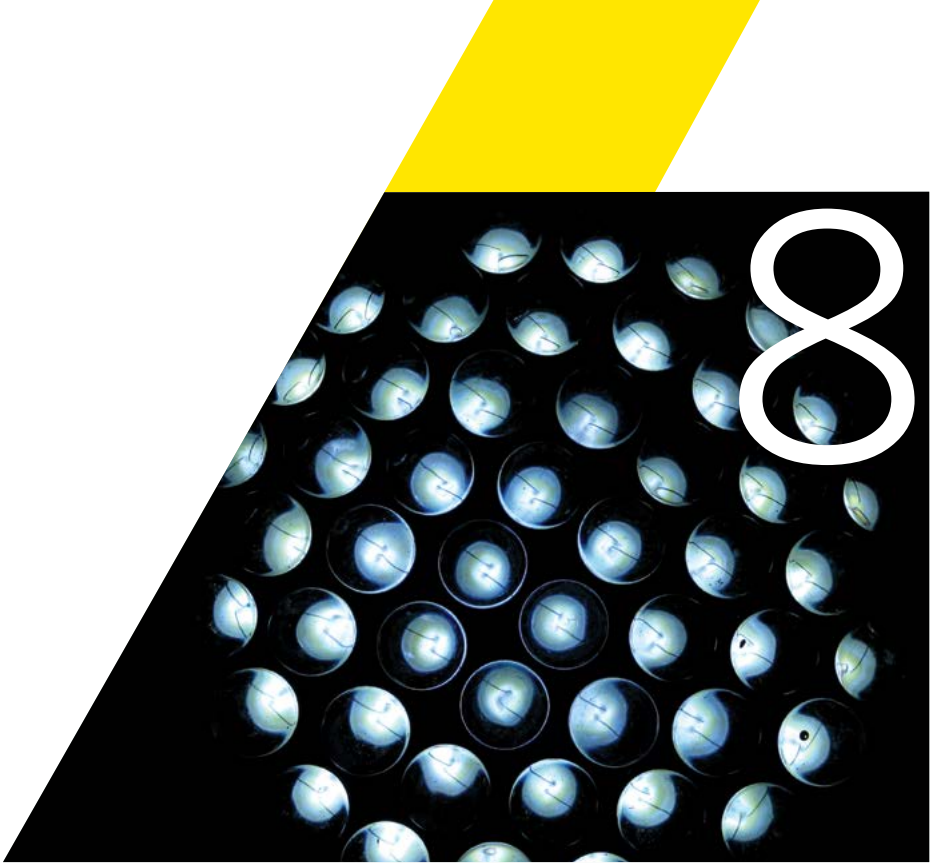
As the only Spanish representative in LIGHTING EUROPE and member of its Executive Board, ANFALUM coordinates the participation of experts from ANFALUM member companies in the various working groups of this organization, which is the only focal point for the European lighting industry in the European Commission. Another major activity in the reporting period was our participation in the agreement signed

with the Community of Madrid and APIEM establishing a renewal plan for emergency self-testing equipment in the Community of Madrid.

The Technical Commission took part in different conferences on Smart Lighting and LEDs (Silica, in Barcelona and Madrid, Seville with the Installers Association of Andalusia).

The Technical Commission has been one of the most active platforms for the past 31 years, drafting regulations and addressing the certification of equipment according to specific requirements.

In the case of luminaires and other equipment, these requirements originally focused on quality and safety, but today they also include lighting technology, energy efficiency and lifecycles. This has required the Technical Commission to start working on new areas.





Some of the new products  
and companies **fail to meet the  
regulatory and legal principles**  
established in the lighting regulations

MARKET INSPECTION COMMISSION

The Market Inspection Commission is an institutional body that deals with lighting equipment that may be in breach of the standards or the regulations. All members work together with the Market Inspection Commission on this important task.

With the introduction of the LED technology, new products have come on the market and new companies have emerged looking for business opportunities. However, some of them fail to meet the regulatory and legal principles established in the lighting regulations.

The Market Inspection Commission works in different ways:

- Signing collaboration agreements with the Foundation for the Promotion of Industrial Innovation (F2I2).
- Reporting violations observed in lighting equipment or installations.

- Analyzing the specifications of public and private tenders.
- Reporting unfair competition, counterfeits, misleading advertisements...
- Participating in the “SURVEILLANCE” working group of LIGHTING EUROPE.

In 2013 we renewed our Collaboration Agreement with F2I2 giving continuity to our ongoing campaigns with AN-FALUM’s own resources. The purpose of these agreements is to sample, test and check products in order to ensure that equipment sold in Spain meets minimum safety and performance standards.

During our 2013 campaign 70 products were inspected. Documentation was requested for 35 of these, and 23 additional products of different characteristics were tested (downlight, built-in and

desk screens, LED bulbs, LED projectors, etc.)

It should be noted that the campaign not only focused on conducting safety tests, but also on photometric tests, electromagnetic compatibility and Eco-Design.

These campaigns are intended to draw the attention of the Ministry of Industry, Tourism and Trade, so that official “safeguard clauses” are established. In this way products that breach EU regulations will eventually be removed from the market.

Our inspection campaigns, which started several years ago, are proving to be effective in raising awareness amongst producers as well distributors, installers and generally, all customers about the need and advantages of buying, selling and installing products that meet the regulations and come from trustworthy companies.

The Market Inspection Commission is able to carry out its activities and encourages members to report unfair competition, counterfeits, etc. through a questionnaire available on AN-FALUM’s webpage.

The questionnaire explains how and why our members can report a company and simplifies paperwork and monitoring.

In this way the Market Inspection Commission seeks to promote competition in the lighting industry, while working closely with other companies and actors on improving product quality in compliance with the existing standards and regulations.

The economic decline should not lead to equipment of poor quality entering the market, as this would undermine the competitiveness of our member companies in the long run.





# COMMUNICATION Report



Press conference held at the headquarters of the municipal authorities of Madrid, July 29, 2013

In 2013 ANFALUM defined two basic action lines in its communications plan. On the one hand, continuing with its communication campaigns in the general interest media in order to consolidate the name of the association and its efforts to promote energy efficiency in lighting systems.

And on the other hand, increasing awareness through both the general interest media and trade publications of new trends in the lighting industry under the SMARTLIGHTING umbrella: LEDs applied to lighting systems and “intelligent” projects using new lighting technologies. ANFALUM’s participation in forums and trade fairs focusing on Smartcities was a reflection of this.

We made a significant impact with initiatives on the occasion of the World Energy Efficiency Day, as well as with topical debates on “eternal light bulbs”, which were widely covered by the media through radio and printed

features and interviews with the main speakers of the Association.

In addition ANFALUM insisted on the important role played by emergency lights in public buildings, and called on the local authorities once again to reconsider their schemes to switch streetlights off, since the safety of all citizens is being compromised. Local and regional media also covered the signing of an agreement with the municipal authorities of Madrid aimed at renewing emergency light systems.

Our appearances on the media and particularly on RTVE, ANTENA 3, TELEMADRID, INTERECONOMÍA TV, Iberoamérica TV, LA SER, GESTIONA RADIO, RADIO CAM, RADIO BALEARES, EUROPA PRESS, LA VANGUARDIA, LA RAZÓN, LA GACETA, LA VOZ DE TENERIFE, EL ECONOMISTA, and INTERVIÚ were discussed and edited in our monthly press clippings, which

are sent out to all ANFALUM members in order to keep them updated on our activities.

Information about the fight against late payment practices and the progress made by the Multi-Sectoral Platform Against Late Payment Practices (PMCM), of which ANFALUM is a leading member, drew the attention of the media.



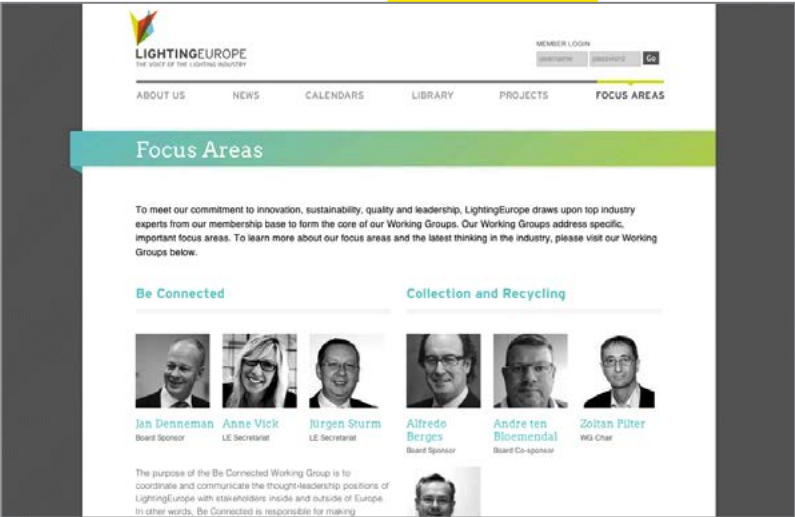
## ANFALUM media appearances







ANFALUM's Chairwoman during the 2nd PMCM Summit, November 7, 2013



Lighting Europe website

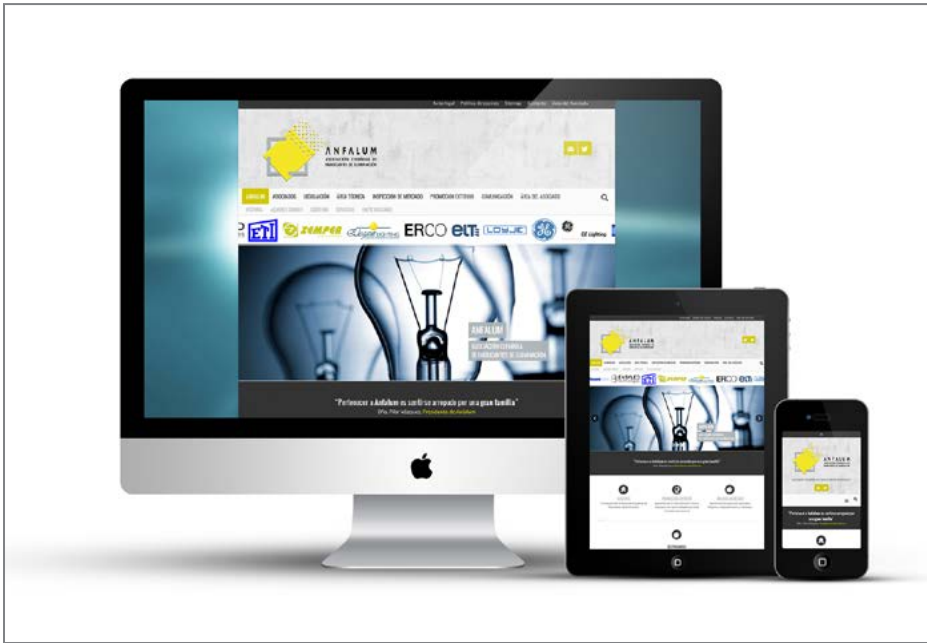


Interlight Moscow trade fair >

Trade journals highlighted these and other topics, including the internationalization of companies within the industry, the latest issues of ANFALUM COMUNICA on LEDs (new regulation, recommendations, certifications, etc.), the creation of a new working group devoted to Smartlighting, and a number of interviews with ANFALUM's new Chairwoman, Ms. Pilar Vázquez.

In 2013 the Department of Communications announced the upcoming revamping of ANFALUM's website, [www.anfalum.com](http://www.anfalum.com). The purpose was to improve the quality of our online service and search engine optimization, and to make the website more user-friendly. We now have a responsive design that fits all mobile devices. We will use the same design for the Association's Newsletter, which will also feature new sections and

New responsive design of [www.anfalum.com](http://www.anfalum.com)



direct links to the social media. Also in 2013 ANFALUM joined Twitter (@ANFALUM). The Association is constantly exchanging short messages with its followers and this is slowly helping us to map strategic audiences with whom to share information of

interest about the lighting industry at international level.

In 2013 the Department of Communications continued to work closely with the communications departments of our member

companies and Lighting Europe in order to improve the flow and exchange of information.

We also covered the lighting trade shows in which ANFALUM participated. Following the success of Interlight Moscow, during the second half of the year we started working on our communication plans for the leading trade shows in 2014: Light & Building (Frankfurt) and Matelec (Madrid), as well as on the organization of the 1st LEDSEE FORUM on LEDs and Energy Efficiency in Lighting Systems that will be held in June 2014.

The Department of Communications covered the technical forums and sessions that ANFALUM attended, where it discussed new technologies, savings and increases in product quality and durability.



General Assembly of ANFALUM (above) and sessions in Seville (below)





## Internationalization was promoted at meetings, conferences and events

In 2013 the Legal Department of ANFALUM continued to protect and promote the interests of the Association and its members in the context of statutory compliance and we did so by clearly focusing on quality.

The revolution started by the LED technology and the resulting emergence of new actors in the market defined the activities of the Legal Department in its efforts to monitor compliance by manufacturers, installers and public authorities with industry regulations and report violations, particularly the

replacement of traditional light sources with LED-based sources in luminaires. Most of the queries submitted by members revolved around unfair competition, the illicit advertising of products, and the violation of industrial and intellectual property rights. Other questions related to good labeling practices and the manufacturer's liability for defective items.

The Legal Department actively cooperated in the development and promotion of alternatives, strategies and opportunities, including the

internationalization of our members, to minimize the consequences of the complex economic situation that the lighting industry is facing in Spain. To that end, the Department participated together with the Association in sessions, talks and events on internationalization options for members offered at different levels and by different bodies. Internationalization was promoted as a competitive advantage.

In 2013 the Legal Department continued to monitor and inform about regulations relevant to

the lighting industry published at national and European level. A major development was the entry into force on September 1, 2013 of the new energy labeling requirements for electrical lamps and luminaires.

Internally the Legal Department continued to provide advice to the governing bodies of the Association. The Department offered guidance on the correct application and interpretation of internal rules and regulations; amended and created documents according to the needs

of the Association and the practical reality; filed credit claims; prepared and reviewed collaboration contracts and agreements with third parties; and participated in meetings and working groups with public authorities, institutions and other associations.

The Legal Department also continued to provide advice to the Association in its capacity as Deputy Chairman of the Multi-Sectoral Platform Against Late Payment Practices. We addressed questions asked by members concerning the application

of the regulation against late payment practices in trade operations and supplier payment schemes, and advocated for the establishment of a penalties scheme for violations of legal payment deadlines and late payment interest, which will be discussed in Parliament in 2014.

Finally, we would like to remind all our members that the expertise and experience of the Legal Department is at your service. We can help you look for effective and efficient solutions to your problems and concerns.

# ECONOMIC Report

## FINANCIAL STATEMENT: BALANCE SHEET

FY 2013 - ACCOUNTING YEAR 2013

FROM 01/01/13 TO 31/12/13

<b>ASSETS</b>	<b>439.518,38</b>
<b>NON CURRENT ASSETS</b>	<b>37.904,52</b>
Intangible fixed assets	19.504,52
Long-term financial investments	18.400,00
<b>CURRENT ASSETS</b>	<b>401.613,86</b>
Trade debtors and other accounts receivable	170.844,81
Sales and service clients	118.694,72
Bad debt	52.008,60
Credit value impairment for trade operations - associated companies	-52.008,60
Other debtors	49.744,65
Tax refunds	1.463,12
Other credit with Public Administratio	942,32
Short-term financial investments	142.000,00
Cash and assimilated liquid assets	88.769,05
Cash	88.769,05
<b>TOTAL ASSETS</b>	<b>439.518,38</b>
<b>NET EQUITY AND LIABILITIES</b>	<b>439.518,38</b>
<b>NET EQUITY</b>	<b>333.633,28</b>
Own funds	333.633,28
Reserves	62.912,12
Voluntary reserves	62.912,12
Results previous FY	315.771,15
Loss previous FY	-15.591,94
Results of FY	-29.458,05
<b>CURRENT LIABILITIES</b>	<b>105.885,10</b>
Trade creditors and accounts payable	105.885,10
Creditors, services	80.819,91
Suppliers	11.112,54
Personnel	-3.976,48
Other debt with Public Administrations	17.929,13
<b>TOTAL NET EQUITY AND LIABILITIES</b>	<b>439.518,38</b>

FINANCIAL STATEMENT: PROFIT AND LOSS  
AS AT DECEMBER 31, 2013

	December 2013
ONGOING OPERATIONS	
Net turnover	651.145,12
a) Sales	417.004,46
Member dues	395.265,50
Other income, advances	21.738,96
b) Services	234.140,66
Other income	234.140,66
 Supplies	 -195.532,61
Purchases and other supplies	-8.400,03
Work made by other entities	-187.132,58
 Other operating income	 41.578,59
Subsidies	41.578,59
 Personnel expenses	 -226.342,74
Wages and salaries	-178.365,38
Social Security charged to entity	-47.977,36
 Other operating expenses	 -364.365,91
Fixed assets depreciation	-3.689,07
 OPERATING RESULT	 -28.632,93
 Financial income	 2.951,42
Financial expenses and assimilated expenses	-3.826,98
 FINANCIAL RESULT	 -825,12
FY RESULT	-29.458,05

FINANCIAL STATEMENT: PROFIT AND LOSS  
BUDGET 2014

	BUDGET 2014
ONGOING OPERATIONS	
Net turnover	661.600,00
a) Sales	431.400,00
Member dues	415.000,00
Other income, advances	16.400,00
b) Services	230.200,00
Other income	230.200,00
 Supplies	 -196.656,00
Purchases and other supplies	-5.400,00
Work made by other entities	-191.255,00
 Other operating income	 39.000,00
Subsidies	39.000,00
 Personnel expenses	 -206.266,20
Wages and salaries	-162.660,96
Social Security charged to entity	-43.605,24
 Other operating expenses	 -272.862,22
Fixed assets depreciation	-3.000,00
 OPERATING RESULT	 21.816,58
 Financial income	 2.000,00
Financial expenses and assimilated expenses	-3.000,00
 FINANCIAL RESULT	 -1.000,00
FY RESULT	20.816,58



# MEMBER Companies



**AFEREF**  
www.aferef.com



**AIMUR ILUMINACIÓN, S.L.**  
www.aimur.com



**ANTARES ILUMINACIÓN, S.A.**  
www.flos.com



**APLICACIONES ELECTRÓNICAS INDUSTRIALES, S.L.**  
www.apein-lumtec.com



**ARMARIOS ELÉCTRICOS, S.A.**  
www.arelsa.com



**ARTESOLAR ILUMINACIÓN, S.A.**  
www.artesolar.com



**ASEFACOL**  
www.anfalum.com/asefacol.asp



**BENITO URBAN, S.L.U.**  
www.benito.com



**BJB-PROCESA, S.A.**  
www.bjb.com



**C & G CARANDINI, S.A.**  
www.carandini.com



**CARIBONI LITE, S.L.**  
www.caribonilite.com



**CELOSÍAS PARA ILUMINACIÓN CELUX, S.L.**  
www.celosias-celux.com



**DAISALUX, S.A.**  
www.daisalux.com



**EASYLED, S.L.**  
www.easyled.com



**ELECTRO TRANSFORMACIÓN INDUSTRIAL, S.A.**  
www.etisa.com



**ELECTRO ZEMPER, S.A.**  
www.zemper.com



**ELEGANT LIGHTING, S.L.**  
www.elegant-lighting.net



**ERCO ILUMINACIÓN, S.A.**  
www.ercos.com



**ESPECIALIDADES LUMINOTÉCNICAS, S.A.**  
www.elt.es



**FABRICACIÓN Y DESARROLLOS ELECTRÓNICOS, S.A. FYDESA**  
www.loyje-fydesa.com



**GE LIGHTING, S.A.**  
www.gelighting.com



**GEWIS IBÉRICA, S.A.**  
www.gewiss.es



**GONZÁLEZ SORIANO, S.A.**  
www.normalux.com



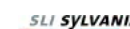
**GRUPO GESTIÓN INTEGRAL NOVOLUX INTERNACIONAL, S.L.**  
www.cristher.com / www.dopo.es / www.venezina.es



**GRUPO LÍNEAS TC, S.A.**  
www.lineastc.es



**GRUPO LUXIONA, S.L.**  
www.troll.es



**HAVELLS-SYLVANIA, S.A.**  
www.havells-sylvania.com



**HELLA, S.A.**  
www.hella.es



**IGUZZINI ILLUMINAZIONE ESPAÑA, S.A.**  
www.iguzzini.es















**ILUMINACIÓN DISANO, S.A.**  
www.disano.it









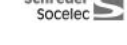







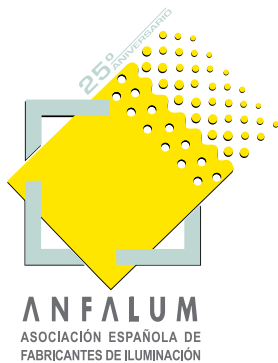
**INTERNACIONAL DE ILUMINACIÓN, S.A.**  
www.sagelux.com



**IREGUA ILUMINACIÓN, S.L.**  
www.ireluz.com

	<b>LAMP, S.A.</b> www.lamp.es
	<b>LÁMPARAS ESPECIALES, S.L.</b> www.laes.com
	<b>LAYRTON (INDUSTRIAS VENTURA S.L.)</b> www.layrton.com
	<b>LEDIND LGI S.L.</b> www.ledind.es
	<b>LG ELECTRONICS S.A.</b> www.lg.com/es
	<b>LEGRAND GROUP ESPAÑA, S.L.</b> www.legrand.es
	<b>LIGHT ENVIRONMENT CONTROL, S.L.</b> www.lecsl.com
	<b>LUXINTEC, S.L.</b> www.litlighting.com
	<b>LUZCO, S.L.</b> www.luzco.es
	<b>MANUFACTURAS PLÁSTICAS MAY, S.A.</b> www.lux-may.com
	<b>MARSET ILUMINACIÓN, S.A.</b> www.marset.com
	<b>MIMAVEN ELÉCTRICA, S.A.</b> www.mimaven.com
	<b>MÓSTOLES INDUSTRIAL, S.A.</b> www.moinsa.es
	<b>NATRUS, S.L.</b> www.cree-europe.com
	<b>NICHIA EUROPE B.V.</b> www.nichia.com
	<b>NORMALIT</b> www.normalit.com
	<b>ODEL LUX, S.A.</b> www.lledosa.es
	<b>ORBIS TECNOLOGÍA ELÉCTRICA, S.A.</b> www.orbis.es
	<b>ORNALUX, S.A.</b> www.ornalux.com

	<b>OSRAM, S.A.</b> www.osram.es
	<b>PHILIPS IBÉRICA, S.A.U</b> www.lighting.philips.es
	<b>PROYECTOS TÉCNICOS DE ILUMINACIÓN, S.A.</b> www.pti.es
	<b>RTR ENERGÍA, S.L.</b> www.rtr.es
	<b>SACOPA, S.A.U.</b> www.ignialight.com
	<b>SALICRU, S.A.</b> www.salicru.com
	<b>SANTA Y COLE NEOSERIES, S.L.</b> www.santacole.com
	<b>SCHNEIDER ELECTRIC ESPAÑA, S.A.</b> www.schneider-electric.com
	<b>SCREENLUZ, S.L.</b> www.screenluz.com
	<b>SECOM ILUMINACIÓN, S.L.</b> www.secom.es
	<b>SELECO IMPOR EXPORT, S.L.</b> www.guli.es
	<b>SIMON LIGHTING, S.A.</b> www.iep.es
	<b>SCHRÉDER SOCELEC, S.A.</b> www.schreder.com/
	<b>STAFF IBÉRICA, S.A.</b> www.lledosa.es
	<b>TOSHIBA EUROPA GmbH SUCURSAL ESPAÑA</b> www.toshiba.es
	<b>TRIDONIC IBÉRICA, S.L.</b> www.tridonicatco.com
	<b>VOSSLOH SCHWABE IBÉRICA, S.L.</b> www.vossloh-schwabe.com
	<b>ZALUX, S.A.</b> www.zalux.com



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