













ANNUAL REPORT

2017

BEYOND
LIGHTING



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LETTER

PRESIDENT'S

Dear Members,
We have now closed yet another year, and as we already envisaged at the end of 2016, the sector's growth has become more firmly consolidated. →

**Dña. Pilar Vázquez,
President of Anfalum**



01

“ COMPARED WITH 2016,
THE SECTOR AS A WHOLE
HAS GROWN BY 3.7%”

At ANFALUM we go on with our strategy of calling attention to our market, and over the year that has now ended our main action was the creation of Transforming Lighting. At this event, with large numbers attending and its successful reception, we attempted to give a different image of lighting, closer to the human being; through smart light we seek a lighting connected to new communications technologies with a great concern for our health and well-being. Its success means we need to prepare a new edition of Transforming Lighting for 2018, at which we hope our members will take part.

As for figures and compared with 2016, the sector as a whole has grown by 3.7%, and the led market has risen by 22%, with a 7% drop in traditional technologies. The led now represents 63% of all the sales in the sector, and is keeping up its growth tendency.

The greatest growth was found in the sub-sector of decorative indoor lighting, and the only drop is in light sources. This last point is understandable if we see that very often the led luminaire is marketed as an assembly.

As for exports, these continue to rise at a good pace, the overall data showing a 5% rise, and our members all agree as to the great success of our products abroad.

Perhaps not as quickly as we manufacturers could wish, but a satisfactory change in technology in this country can nevertheless be appreciated, and although in the early days the quality of the product installed was not as many of us would have liked, and even today we continue to come up against some unqualified practice, the training endeavors and work done on the institutional level of our Association are starting to bear fruit; more and more obstacles are being placed for certain products with a view to keeping up the technical level of lighting in Spain.

It only remains to be said that we shall go on working in the same approach, and I wish you all the greatest success in next year 2018.

With best regards,

A handwritten signature in black ink, enclosed within a hand-drawn oval. The signature appears to read 'Pilar Vázquez'.

DIRECTOR'S LETTER

02

I would again like to contribute to this ANFALUM 2017 Report to inform you of the activities, results and the projects and prospects opening up with regard to our Association's work as organization in charge for defining the strategic lines of the future sectoral policy for lighting. →



**D. Alfredo Berges,
General Director
of ANFALUM**

With a lot of hard work the Managing Bodies, the structure and these companies were able to open up a niche in the different bodies which would mean that from that time on "people talked about lighting companies".

The technology and market practices were somewhat different but there was nevertheless a common bond which still remains: "the knowledge of light". Over the years we have borne witness to technological change, the professionalization and technification of companies, the opening of new markets on the international scale, new customers, etc. In all these stages ANFALUM has been there to advise, create standards, and contribute to competitiveness.

It has been particularly strict with the legislation on quality products and installations and kept up competition within the rules of the free market, thus complaining about any breaches with adverse effects on manufacturers, customers, users and other agents involved in the sector. In other sections of this report we give market figures and information on technology as well as describing our structure and our extensive institutional and promotional work which has made us a benchmark in the lighting sector.

We know that the present market involves changes which are taking place at hitherto unheard of speed and the response given by ANFALUM thus has to be faster, using the available technologies and interacting with other sectors, other companies, and other organizations in the new setting that has been created.

ANFALUM launched the theme "Beyond lighting" and we intended this not to be just another slogan in a setting of image and specific impact. On the other hand, we wanted to open up new lines, we have diversified our scope, are promoting new functionalities and preparing for new challenges. Digitalization is the future and our aim is to use this, disseminate knowledge and at the same time promote ANFALUM and its companies.

In 2018 we shall go on with the task through the second edition of TRANSFORMING LIGHTING, getting under way the ANFALUM app and the digital edition of the LED lighting Guide, which is being drafted with the cooperation of companies and sectors connected with the lighting business.

Lastly, and from my position in the structure, I should like to thank you all for your cooperation, as the recognition that you give us will lead us to keenly go on with this task of underscoring the value of lighting and thus increasing the competitiveness of ANFALUM members.

OBITUARY

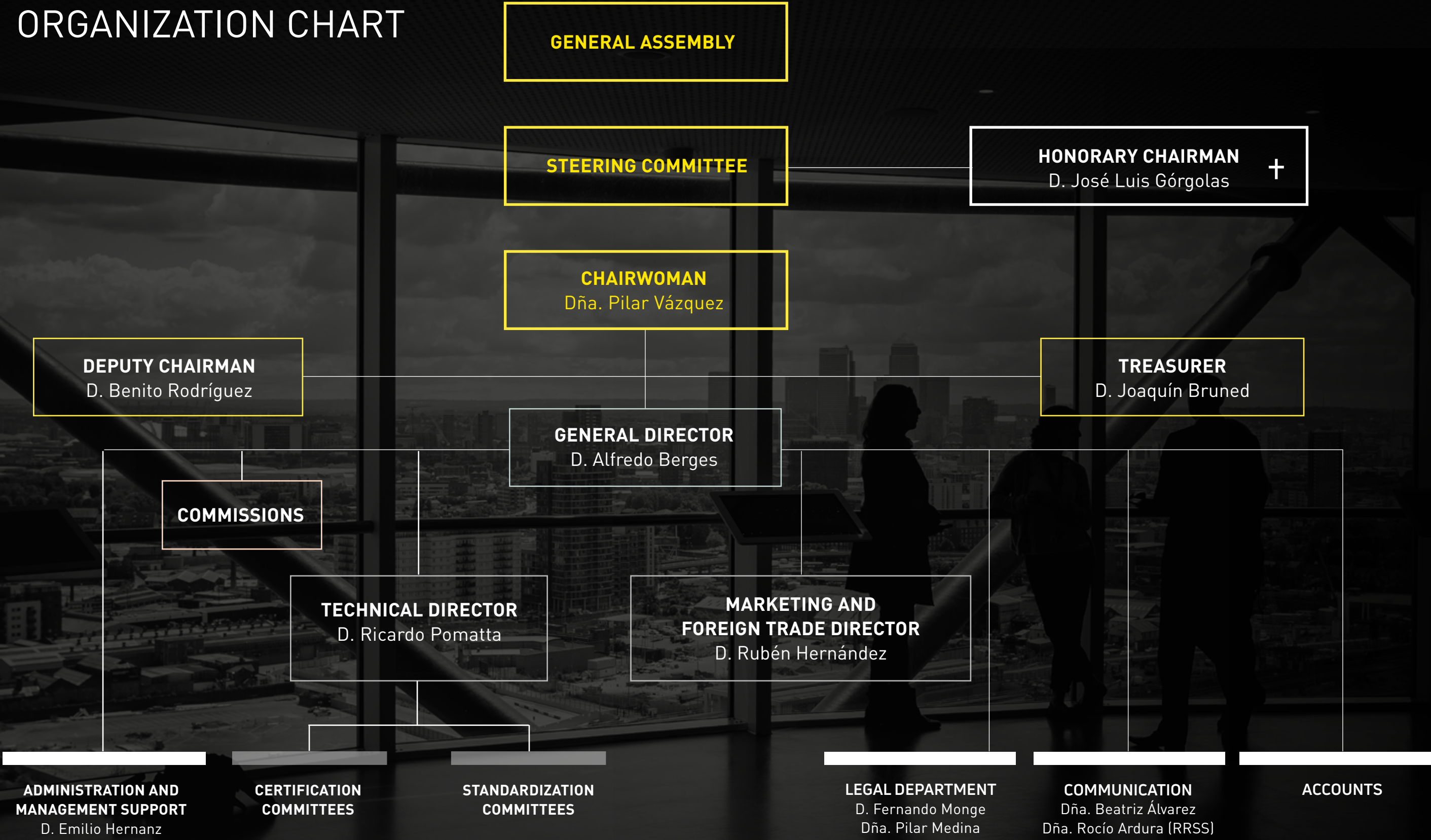
ANFALUM regrets the loss of two excellent colleagues and friends in 2017: José Luis Górgolas and Fabrizio Damiani.

José Luis Górgolas was one of the first Chairs of the Association and remained an Honorary Chair of ANFALUM until his death.

Fabrizio Damiani also had a long career in the lighting industry that spanned more than 30 years, holding relevant positions at the different companies where he built his successful professional life.

Their contributions to the industry and to ANFALUM leave an indelible imprint, just as important as their deep human values, which were well known by all who worked with them. May they rest in peace.

ORGANIZATION CHART



ORGANIZATION

STEERING COMMITTEE ACTIVITY AREAS

STEERING COMMITTEE

CHAIRWOMAN	Dña. Pilar Vázquez
HONORARY CHAIRMAN	D. José Luis de Górgolas 
DEPUTY CHAIRMAN	D. Benito Rodríguez
TREASURER	D. Joaquín Bruned
GENERAL DIRECTOR	D. Alfredo Berges
BOARD MEMBERS	OUTDOOR LIGHTING SCHREDER SOCELEC S.A.- D. Francisco Pardeiro C&G CARANDINI- Dña. Pilar Vázquez INDOOR LIGHTING MARSET ILUMINACIÓN S.A. - D. Jesús Marset GRUPO LUXIONA S.L. - D. Albert Milé ODEL LUX S.A. (GRUPO LLEDÓ) - D. Rafael Lledó LEC S.L. - Andrés Guerrero LAMPS LEDVANCE S.A.U. - D. Benito Rodríguez PHILIPS IBÉRICA S.A. - D. Santiago Erice COMPONENTS RTR ENERGÍA S.L. - D. Cesar Nuñez-Barranco BJB PROCESA S.A. - D. Joaquín Bruned EMERGENCY LIGHTS ELECTROZEMPER S.A. - D. Jesús María Espinosa CORPORATE MEMBERSHIP ASEFACOL - D. Santiago Sanz

ACTIVITY AREAS

CORPORATE AREA	D. Alfredo Berges
TECHNICAL, QUALITY AND MARKET INSPECTION AREA	D. Alfredo Berges D. Ricardo Pomatta
MARKETING AND FOREIGN TRADE AREA	D. Rubén Hernández
EU AND INTERNATIONAL RELATIONS AREA	D. Alfredo Berges D. Ricardo Pomatta
TRAINING AND PUBLICATIONS AREA	D. Alfredo Berges D. Rubén Hernández
COMMUNICATION AND SOCIAL MEDIA AREA	Dña. Beatriz Álvarez Dña. Rocío Ardura

COMMITTEE

AREAS



RELACIONES INSTITUCIONALES

In 2017 the Association continued to make every effort to improve its Institutional Relations with other bodies and entities. At a time of constant change at the local, national and international level, ANFALUM worked with enthusiasm and leadership and continued to convey its values to national and international markets, as a leading association that represents the interests of manufacturers within the lighting industry. →

RELACIONES

ANFALUM is also the only representative of the Spanish market in Lighting Europe. Part of its Executive and Associations Committees, it helps design the industry's roadmap from Brussels together with its European counterparts. In fact, this Strategic Plan was first outlined in Madrid in March 2016. Among the activities carried out by Lighting Europe in 2017, we would like to particularly stress 'Lighting Summit', which was held in Brussels in March, and our engagement with different Working Groups.

In its Institutional Relations, ANFALUM strives to achieve a spirit of cooperation and transparency with authorities, business organizations, and other stakeholders, as a way of ensuring the good operation of our market in general and our manufacturers in particular.

In this sense, with regard to our interaction with the authorities, our ongoing efforts with the Ministry of Industry, Tourism and Trade of Spain through the Secretariat of Industry and more specifically, the Directorate General for Industry and SMEs are worth mentioning. These entities have always been invaluable focal points for ANFALUM to present its proposals.

In terms of Energy, we continued to receive the support of IDEA at a time when investment in and assistance with energy efficiency issues are still much needed.

Also of note was our interaction with the Ministry of Economy and Competition and more specifically, the Directorate General for Foreign Trade, of which ANFALUM is a collaborating entity. In particular, ANFALUM stepped up its efforts in Foreign Trade by coordinating its actions with ICEX, whose support in terms of funds and resources is essential for our member companies to carry out their activities.

With regard to our actions in the Autonomous Regions, we worked with local and municipal authorities, whose cooperation is key. In this context, we engaged with the regional and municipal departments for industry and trade, given their regulation and market surveillance capacity.

An example of this was our collaboration with the Autonomous Community of Madrid, where ANFALUM provides assistance in the market surveillance area and the preparation of user guidelines and lighting conferences.

Regarding business organizations, ANFALUM is a member of and actively participates in CONFEMETAL (Confederation of Metal Associations). ANFALUM is part of the CEOE and CEPYME Committees, including those on Energy, Infrastructures and Economy, where major policy guidelines are decided within the metal industry, of which lighting is a component.

ANFALUM is part of the Governing Bodies of AENOR - UNE, particularly through the Managing Director of its Standing Committee and Management Board. By cooperating with the Technical Standardization and Certification Committees, ANFALUM is at the forefront of the future conformity assessment policy needed to ensure quality standards are upheld in the lighting industry.

As we have pointed out before, market surveillance is another strategic focus of ANFALUM, given the need to promote a decisive policy in support of market orthodoxy and compliance with the regulations.

ANFALUM would like to shape a market where business competition prevails and where there is no place for any unfair conduct leading to opportunism and illegality.

Our market surveillance efforts include the agreement signed with the Foundation for the Promotion of Industrial Innovation (F2I2), which has now been in force for a number of years.

Our cooperation with SERCOBE as members of its Board and Executive Committee also allows us to exert leverage in crafting partnerships supporting a more valuable industry. In 2017 ANFALUM strengthened its cooperation with energy service providers. In that connection, we held several business meetings with the Association of Integral Maintenance and Energy Services Companies (AMI).

ANFALUM also has a close relationship with the roads industry: on the one hand, by being members of the Spanish Roads Association (AEC), where we promote inspection plans; and on the other hand, through the Spanish Federation for Road Equipment (FOROVIALL), having made six presentations this past year across the nation together with the Spanish Federation of Municipalities and Provinces (FEMP).

We would also like to emphasize our interactions with the associations that make up the electricity industry AFME, FACEL, AGBEL, APIEM, FENIE and ADEMI.

Finally, the Multi-Sector Platform against Late Payment Practices (PMcM) is an initiative created by ANFALUM and we have remained active at the highest level, with our Chair acting as the Vice-Chair of this important platform.

“

IN ITS INSTITUTIONAL RELATIONS, ANFALUM STRIVES TO ACHIEVE A SPIRIT OF COOPERATION AND TRANSPARENCY WITH ALL STAKEHOLDERS”



The Special AGM of ANFALUM began with a minute of silence in memory of José Luis Górgolas, former Chair and Honorary Chair of the Association. At the end of the meeting, a commemorative plaque was presented to Aurelio Espinosa, President of Zemper, and his son, Jesús María, its current director, on the occasion of the 50th anniversary of their company, which specializes in emergency lights.

INDUSTRY NUMBERS

06

This report provides an overview of lighting industry trends in Spain by analyzing the turnover of ANFALUM member companies, whose representativeness nears 90%. ↓

NUMBERS

This report provides an overview of lighting industry trends in Spain by analyzing the turnover of ANFALUM member companies, whose representativeness nears 90%.

The figures presented here were obtained by analyzing data supplied by ANFALUM members and other sources. ANFALUM experts were charged with consolidating the data and no bias was applied to favor one company over another.

In 2017 the lighting industry increased at a pace of 4.2%, relative to 2016. The year 2016 was rather atypical, since national political instability and other macroeconomic factors resulted in the sector growing barely by just 0.5%. Therefore, in 2017 we went back to more optimistic numbers than in the previous year, reaching a total of €1.362 billion in the entire industry. As it will be explained, the large majority of subsectors showed a positive trend.

Below are the most relevant facts and highlights in relation to previous years:

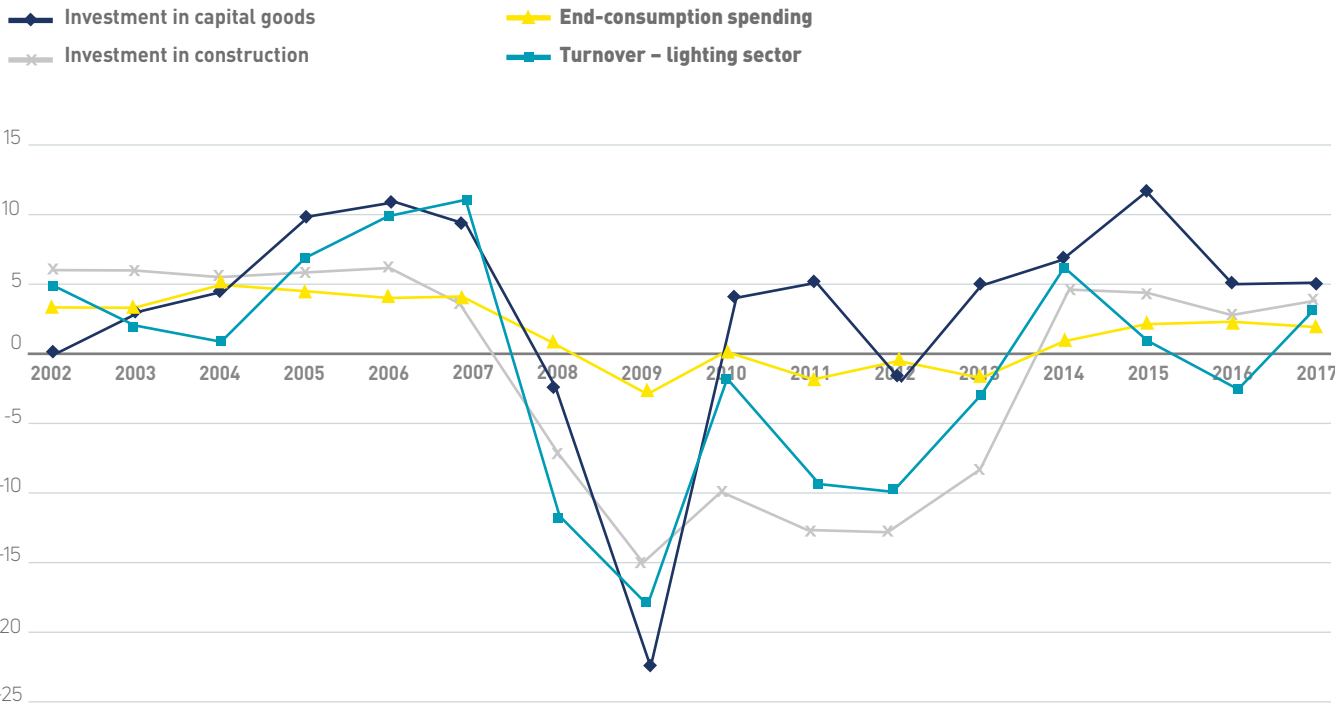
- 1. LED in all its variants consolidated, with a market share over 61%.
- 2. Exports also consolidated their share at 37%.
- 3. The domestic market regained stability after a series of institutional and budgetary crises.

Continuing growth resulted from a very balanced mix of consolidated exports, an increased LED presence and stronger domestic demand.

The three facts above helped the lighting industry go back to good turnover levels, after having been hardly hit by the crisis. Despite the fact that turnover remains low, it is now possible to lay the foundations for growth through internationalization, which is ever more consolidated among our members; and higher LED sales, which exceed even the most optimistic forecasts from previous years and along with rising domestic consumption, will help achieve sustained growth in the coming years.

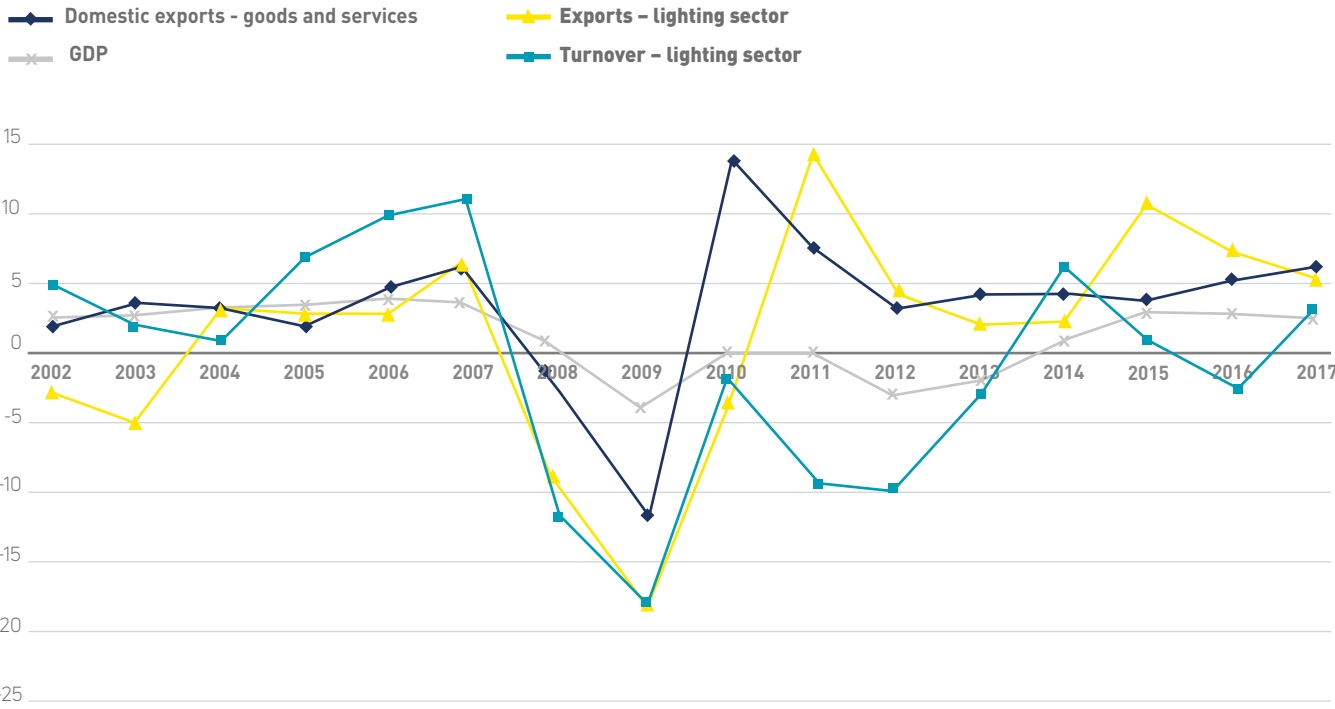
“IN 2017 THE LIGHTING INDUSTRY INCREASED AT A PACE OF 4.2%, RELATIVE TO 2016”

ANALYSIS OF THE DOMESTIC ECONOMIC SITUATION. VARIATION IN %



This chart clearly shows how all elements contributing to demand remained unchanged in 2017, compared to the previous year, with the exception of lighting, which had a significant growth. Sources: SERCOBE, National Accounts, Seopan.

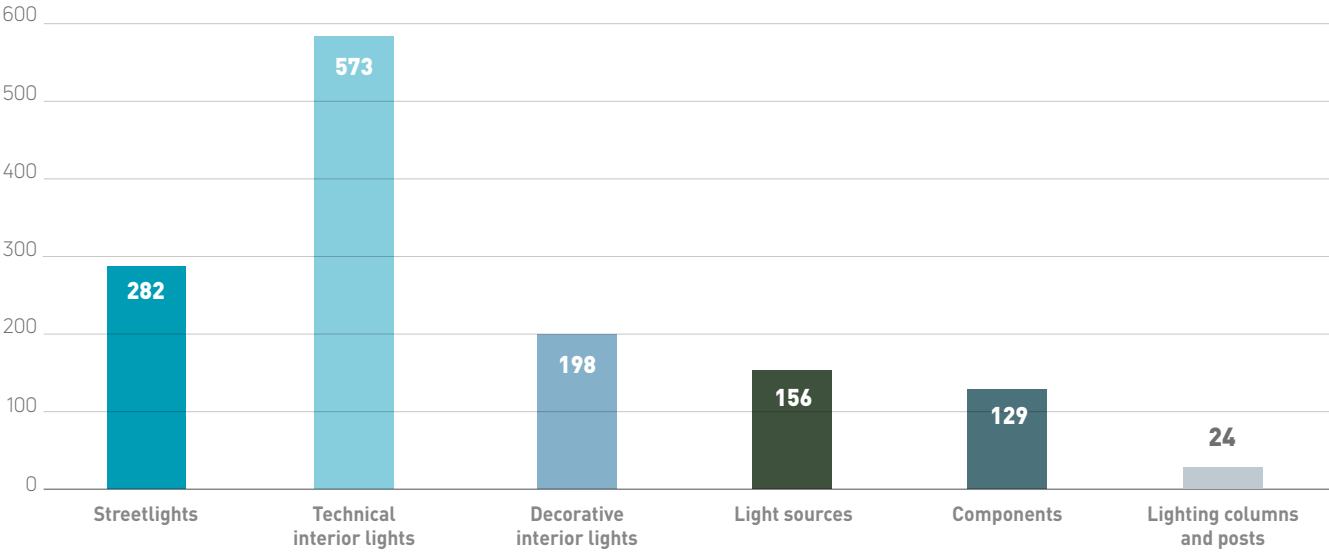
COMPARATIVE ANALYSIS OF THE SECTOR



This chart shows how demand remains the same in household consumption and exports of goods and services consolidate. It also shows an increase in the lighting industry.

TURNOVER – LIGHTING INDUSTRY IN 2017 (ESTIMATED)

Turnover in 2017 (estimated): €1.350 billion



Streetlights

After the growth experienced in 2014 and 2015, and the 10% decline in 2016, this important sector fell by 6%, to €282 million in turnover. The decline was mostly due to political instability and the lack of a government in Spain in 2016, added to a lack of projects and investment. For its part, the LED mix reached 65% in streetlights.

Technical interior lights

Accounting for the largest share in turnover terms, the technical interior lights sector managed to consolidate a 7.5% growth vs. 2016 figures at 4.38%, exceeding €573 million in 2017. To a large extent, this was mainly due to higher LED sales (73%) and the good performance of exports (over 35%).

Technical interior lights remain the sector's backbone and still account for over 30% of total turnover, therefore reaching a fundamental critical mass for the development and dynamics of the industry.

Light sources

A strategic sector within the lighting industry, light sources suffered a slight decline in 2016 (8.23%) because of the presence of many low-quality brands offering products of very poor quality that fragmented demand. Light sources grew by 7.05%, coming to €156 million in turnover. LEDs accounted for 58% of sales and the drop in demand in relation to gas-discharge lamps and fluorescent lamps was already noticeable. These two light sources had been showing a downward trend, but had remained stable up until 2013.

As in other sectors, an increase in domestic demand encouraged growth because light sources have limited export possibilities. Therefore, the sector relies on energy efficiency innovations and the evolution of the market, where the new LED sources are the basis for the development of this highly technological and dynamic sector.

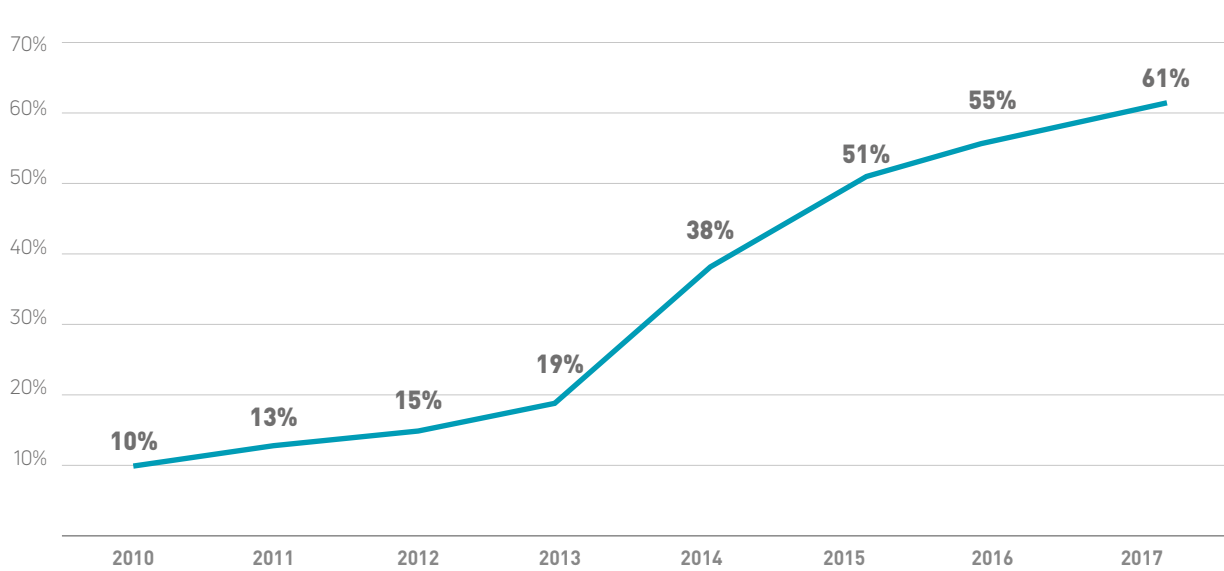
Components and lighting technology

This sector grew by 1.6%, reaching €129 million, whereas in 2016 it decreased by 5.9% as a result of falling exports and the continued decline in traditional components demand, which, in this case, is not adequately compensated by LED solutions. Just as for light sources, this sector is currently in the midst of a technological change and must adapt to the ongoing changes and improvements brought about by the continued development of LED technology. This has caused tensions in the market and has had a negative impact on demand.

Decorative lights

This sector managed to grow by 11.86% in the past year. This increase, together with the growth experienced in 2016 at 5.6%, make it the subsector with the most remarkable upward trend. Driven by increased private consumption over the year, it reached €198 million, despite the obstacles posed by imports from the Far East.

MARKET SHARE TRENDS. LEDS



Its demand profile and product mix are ever more similar to those of technical indoor lights, largely as a result of the successful implementation of LEDs, which account for 73%.

EXPORTS

The following conclusions can be drawn from the statistics obtained in December 2017 among ANFALUM members.

Geographical areas:

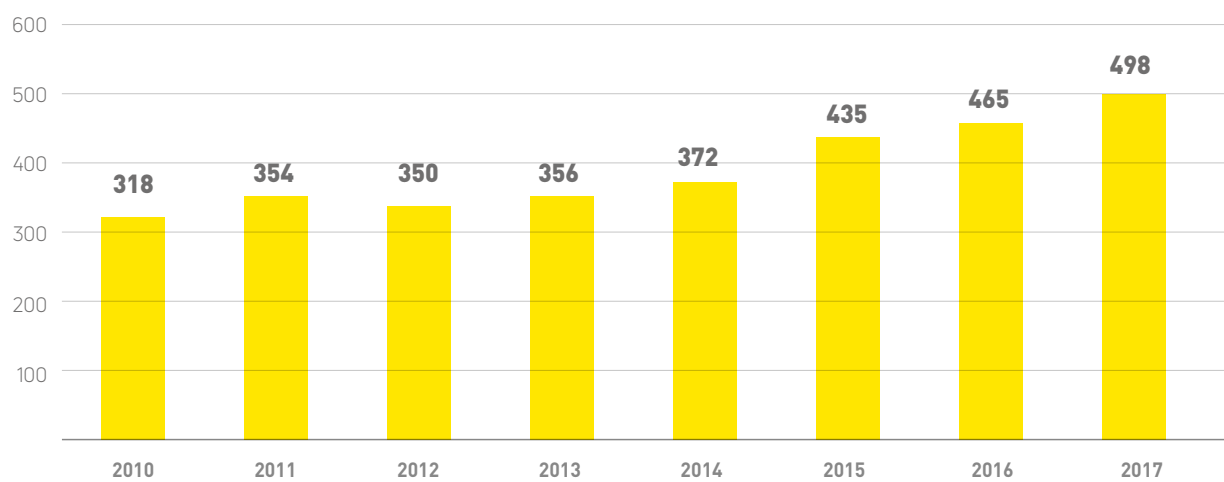
EU 27 and Rest of Europe:	67,10%
Arab Countries - Middle East / North Africa:	12,10%
Latin America:	6,80%
United States / Canada:	3,0%
Rest of the World:	10,90%

Nearly all ANFALUM members are exporters. In 2017 the number of net exporters remained at 50. They turned over more than 35% in exports.

Global exports amounted to €498 million, accounting for 37.15% of the Association's turnover.

EXPORTS – LIGHTING INDUSTRY

In million €





EVENTS AND FAIRS

Silvia Leal, specialist in digital transformation and key speaker

Noteworthy among all fairs and events held in 2017 is 'TRANSFORMING LIGHTING', the new event organized by ANFALUM.

TRANSFORMING LIGHTING is an initiative of ANFALUM that brings a new strategic approach to the lighting industry allowing us to streamline new technologies for a better future.

The idea behind the event is to meet the current need of the lighting industry, which is linked to the unique evolution experienced by the sector as a result of the use of LED technologies. In addition to improving light and energy efficiency generally, LEDs present a series of features that promote 'Intelligent Lighting', thus broadening the concept of lighting. The next step will be to promote the idea of lighting as a service that also improves our wellbeing and health.

TRANSFORMING LIGHTING was a meeting point for leading experts in innovation and new technologies, architecture and engineering. Nearly 25 speakers from cutting-edge organizations discussed technological developments, which are key to most companies and authorities.



Marta Robles, Transforming Lighting presenter, with Alfredo Berges



Diederik de Stoppelaar (Lighting Europe) during the first edition of Transforming Lighting



Anfalum's stand at Light Middle East (Dubai)

Light Middle East 2017

Internationally, we would like to highlight the action carried out in the United Arab Emirates in October. This was the second time the Association visited Dubai in recent years.

ANFALUM, together with several lighting companies from Spain, participated in LIGHT MIDDLE EAST, the Dubai Lighting Fair, which was held from October 17-19. Our joint "Spanish pavilion" at the fair represented more than 370 entities. The number of delegates in 2017 exceeded that of the previous edition, with close to 7,000 participants during the 3 days of the fair.

We had a stand and an information area where we promoted Spanish products and companies, and raised awareness about the Human Centric Lighting roadmap put forward by Lighting Europe, as well as other issues related to new technologies. ANFALUM, which carried out this action yet another year within the framework of the Sectoral Plan 2017, with which companies receive the support of ICEX, focuses its efforts on this ever growing region.



Entrance to Light Middle East (Dubai)

Marta Robles, journalist and author, conducted the event, in which such relevant figures as Silvia Leal, Diederik de Stoppelaar, Fernando Mugarza, Tristan Lopez-Chicheri and Robert Hutchinson, participated.

The event focused on the role of public authorities, decision-makers in the field of urban planning, architects and engineers, interior designers, business associations, experts in innovation and new technologies, hospital directors, lighting manufacturers and new actors, which play a major part in the future of our sector.

TRANSFORMING LIGHTING was divided into two areas, where different activities took place: a main stage for our key speakers and round tables; and a networking area, where delegates were able to meet with guests.

“TRANSFORMING LIGHTING IS AN INITIATIVE OF ANFALUM THAT BRINGS A NEW STRATEGIC APPROACH TO THE LIGHTING INDUSTRY”



In 2017 the work done by the Technical Area focused on improving technical services for our members, as well as speeding up the inspection measures carried out by the association, seeking in general terms to become a more professional sector with a higher quality product, always intending to go beyond lighting by promoting "Intelligent Lighting" and with our aims based on the human being (Human Centric Lighting).

At ANFALUM we support the digitalization of the sector, as part of Industria 4.0, and the adaptation of all our companies to products and for enabling other sectors in the current setting. At the present time lighting should be considered as a service and not only as a matter of selling products with the best technological performance.

With ledification, i.e. the use of LED technology along with management systems of both artificial light and natural light, we get intelligent lighting which seeks to serve the human being.

ANFALUM considers the dissemination of these concepts to be a priority matter and has again arranged different symposia to this end over this year.

The main lines of the work done by ANFALUM in this area are:

- Standardization and Certification.
- Regulation and Work groups.
- LIGHTING EUROPE.
- Market inspection.

The association manages and coordinates participation by experts from our companies in the CTN-205 standardization committee known as "Luminaires, lamps and related appliances" and the CTN-72 Standardization Committee known as "Lighting and color". Since the separation in 2017 of AENOR into AENOR INTERNACIONAL and UNE, UNE has been in charge of carrying out the standardization side. The work done by these committees revolves around reviewing and preparing standards on construction and safety aspects and the lighting technology conditions of luminaires. To be able to carry out this increasingly important work demanded by companies an evaluation of the cost for the ANFALUM structure has been made, included in the membership quota paid by the company and differentiating between members and non-members.

ANFALUM is seeking to draw up a regulation within the standards on installations to govern energy efficiency conditions, lighting technology conditions enabling us to provide a classification for installations and not only for the product. At the present time we have the Energy Efficiency Regulation in Outdoor Lighting Installations, a ground-breaking concept unique in Europe and our wish is to create Regulations for different installations along with LIGHTING EUROPE.

Work has continued on other standardization committees, in the sphere of AENOR, in which the presence of ANFALUM was vital to take part in in strategic themes such as smart cities (SMARTCITIES), CTN-178, or the Technical coordination group for Electro-technical standardization, in which the different associations managing the committees connected with electricity and energy are members; and CTN 216 on Energy efficiency, Climate Change and Renewable energies, in which a rule has been created to accredit the companies working in energy services.

Delegated by AENOR INTERNACIONAL, ANFALUM continues with the management of the Secretariat of the two Technical Certification Committees affecting our sector; these are the CTC-007 "Luminaires, lamps, condensers and related appliances" and CTC-019 "Lighting supports". These are in charge of granting N, ENEC marks and in the case of CTC-007 also the ENEC+ mark, which cover these products and represent a sign of quality and commitment with compliance of regulations (Regulations and Guidelines).

Over this first year in view of the necessary remodeling which had to be done within the committee to adapt to the new requirements by ENAC, different institutions such as ECOLUM and AMBILAMP joined the institution, and such important administrations as Madrid Council, the Community of Castille la Mancha and Madrid Community [regional administrations] continued to take part in this. We should stress that last October our committee, as well as one of our associated companies (SIMON LIGHTING), received the first ENEC + to be awarded in Europe for a lighting product.

The participation of ANFALUM, as sole Spanish representative in Lighting Europe means that it plays an increasingly active role with a greater number of experts involved, in its different

THE PRESENCE OF ANFALUM IS INCREASINGLY IMPORTANT FOR OUR MEMBERS AS ITS TRANSPoses THE INTERNATIONAL SITUATION OF THE SECTOR"

work groups. Given the latest changes in the strategic plan of European employers, the creation of four major work groups was decided on:

- LEDIFICATION
- CIRCULAR ECONOMY
- INTELLIGENT LIGTHING
- HUMAN CENTRIC LIGTHING

The WORKING GROUPS create TASK FORCES, or small work groups for specific situations or applications considered to be of special importance. The presence of ANFALUM is increasingly important for our members as its transposes the international situation of the sector, in the European Area, to the real situation of Spanish industry, managing to keep our companies supplied with completely updated information on the progress made in the sector on the EU INTERNATIONAL level.

ANFALUM continues to be the only representative in Spain of the following work groups in the Technical Area of LIGHTING EUROPE:

- W.G. LEDIFICATION
Mr. Ricardo Pomatta
- W.G HUMAN CÉNTRICA LIGTHING
Mr. Rafael Lledo
- W.G INTELLIGENT LIGTHING
Mr. Miguel Garcia
- W.G CIRCULAR ECONOMY
Mr. Alfredo Berges

Además de algunos TASK FORCE como:

- TF EMERGENCY LIGTHING
Mr. Jesús María Espinosa
- TF SMALL LIGTHING REGULATION
Mr. Ricardo Pomatta
- TF MARKET SURVEILLANCE
Mr. Ricardo Pomatta
- TF STADISTICS
Mr. Rubén Hernández



UNE Electrotechnical Coordination Group

The coordination of the participation in these WG is handled by the Management of the Technical area along with the other areas of activities implemented at ANFALUM.

The Technical Area also had a major part in the coordination and implementation of TRANSFORMING LIGHTING, an event on innovation whose first edition was in 2017.

As well as all the aforementioned activities we should stress the participation by the Technical Area in different symposia put forward by FOROVIAL, in which ANFALUM takes an active part along with other associations connected with the road ESPAÑOLA DE MUNICIPIOS). At these events road equipment is studied on a joint basis, including both vertical and horizontal signposting, barriers and road lighting.

Work has continued with the Market Inspection activities in which, along with the measures carried out directly by the association, companies in detecting legislative breaches and other acts of unlawful conduct or unfair competition were involved.

The following measures were taken in this Market Inspection Activity:

- Cooperation agreement with the Foundation for Fostering Industrial Innovation (F2I2).
- Complaints for regulatory breaches in lighting products or installations.
- Analysis of specifications in public and private tenders.
- Complaints about acts of unfair competition, illegal copies, misleading advertising
- Participation in the Pilot Scheme for Inspection of the Luminaire Market of LIGHTING EUROPE.

In the inspection campaign performed with F2I2 over 2017 a total number of 20 products were inspected, with documents being requested for these and the respective tests being made

“THE TECHNICAL AREA ALSO HAD A MAJOR PART IN THE COORDINATION AND IMPLEMENTATION OF TRANSFORMING LIGHTING”

The campaign involved carrying out safety tests, photometric tests, electromagnetic compatibility and Eco-Design. The final objective is to foster action by the Ministry of Industry, Tourism and Trade for them to bring in “safeguard clauses”; and later communication to the regional administrative areas to prevent the marketing and sale of products which do not comply with current European Union legislation.

These inspection campaigns, which have been implemented for several years now, are proving to be effective in raising the awareness of both manufacturers and distributors, fitters and in general all the parties involved in the sector as to the need to acquire, market and install products complying with legislation and coming from companies providing the utmost guarantee for their product.

The Market Inspection Area of ANFALUM facilitates and promotes the members being the ones to make complaints on unfair competition, fraudulent copies, etc. On the web page of ANFALUM they have a questionnaire for this purpose in which the procedure for reporting complaints on such acts is explained.

At the present time the PILOT SCHEME FOR INSPECTING THE LUMINAIRE MARKET is being got under way, which will mean, through ANFALUM, that Spain is one of the countries in which products will directly be bought for their inspection.

These campaigns are of vital importance since it enables us to “clean” the market of products which do not comply with minimum quality requirements, along with opportunists in the sector who are only seeking economic profit without the minimum quality standards required.

“THESE INSPECTION CAMPAIGNS ARE PROVING TO BE EFFECTIVE IN RAISING THE AWARENESS TO THE NEED TO ACQUIRE, MARKET AND INSTALL PRODUCTS COMPLYING WITH LEGISLATION”



Conference at Transforming Lighting



Alfredo Berges in Transforming Lighting →



09

← Round table discussion at Transforming Lighting

COMMUNICATION REPORT

COMMUNICATION

STRATEGIC COMMUNICATION AND MEDIA RELATIONS PLAN

The most remarkable action of the first quarter of 2017 was the first-ever Transforming Lighting event, which was held on February 16. A large part of the activities developed by the Communication Department also revolved around this event, at which ANFALUM discussed the major transformation experienced by our industry in the past years and the way forward.

With the goal of positioning Transforming Lighting as the main event of the year and the leading authority in the digital industry, a special Communication Plan was designed for the occasion that guided the various meetings of the work group, in which the companies sponsoring the event also participated. The strategy had a wide-ranging media impact: in addition to the media covering the event, more than 100 articles were published in general and specialist media.

El Mundo and Capital Radio interviewed our Director, Alfredo Berges, to discuss Human Centric Lighting. Fernando Mugarza, MD and a speaker at Transforming Lighting, also talked about this concept with the media. Human Centric Lighting focuses on the relationship between lighting and its impact on our lives, from both a biological and a psychological point of view.

The event was presented by Marta Robles, who welcomed over 10 speakers at the highest level, including Begoña Cristeto, Antonio Garamendi, Silvia Leal, Diederick de Stopelaar and Fernando Mugarza. Shortly after the event, Robles devoted her weekly column in La Razón to the lessons learned at Transforming Lighting under the title "La Luz Idónea".

More than 300 participants attended the event, which was held at the idyllic Palacio de Neptuno, in the center of Madrid. The day was filled with surprises, interviews with spokespersons, networking opportunities and invaluable information that left no one indifferent. The Transforming Lighting communication plan included an awareness campaign: in the months prior to the event, video materials were created and participants, sponsors and collaborators were interviewed. In addition to this major event, ANFALUM continued to be featured in technical articles, editorials and interviews in the national and international media. Alfredo Berges was interviewed by RTVE about road lighting and by other media about the stroboscopic or Flickr effect. He also participated in an article published in the Huffington Post about LED tips.

At international level, various press releases were exchanged with Lighting Europe's Communication Department, and the re-election of Alfredo Berges to its Executive Committee was widely covered.



Interview with Jesús María Espinosa →

“THE MOST REMARKABLE ACTION OF THE FIRST QUARTER WAS THE FIRST-EVER TRANSFORMING LIGHTING EVENT”

← Article written by Marta Robles in La Razón



Interview with Alfredo Berges in La 1

The Annual Report for 2016 was presented in two languages (Spanish and English) at the July Assembly. It is available as a PDF to all members.

In the second quarter of 2017 we worked on the most current thematic axes, around which the second edition of Transforming Lighting was organized: the 'LEDification' of the market, Human Centric Lighting, Intelligent Lighting and digital transformation, Regulation and Quality, among others. Up to 200 press impacts, in addition to the different actions coordinated with digital channels (newsletter, website and social media).

We also began to cooperate with AENOR's communication department in the preparation of a LED Guide and an application with different functionalities that will soon be available on our mobile devices.

In addition to the communication actions that centered on various international fairs, such as Light Middle East (Dubai), where ANFALUM had a stand, we also began to work on our participation in other fairs, including Light & Building (Frankfurt) and EPower & Building, The Summit.

Creating awareness about international developments in cooperation with Lighting Europe and our members continues

to be a priority. An example of this were the interviews with Jesús María Espinosa, on the occasion of the 50th anniversary of Zemper, and Rafael Lledó, in his capacity as member of ANFALUM's Steering Committee.



ANFALUM during a press conference at Light & Building

ONLINE AND SOCIAL MEDIA PRESENCE

Our digital strategy focused on improving secure communications and actively promoting Twitter during events and other actions.

In 2017 the internal structure of ANFALUM's website was improved by increasing downloading speeds and strengthening online security.

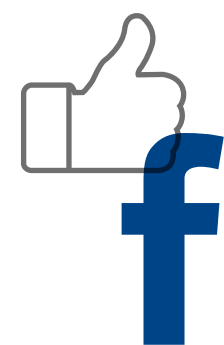
Regarding internal communications, two newsletters were sent out to our member companies, as well as institutional and sales contacts. Newsletters were gradually adapted to the new requirements established in the Data Protection Act.

ANFALUM's webpage received more than 38,000 VISITS over the year. By the end of 2017, @Anfalum had 1,900 followers on Twitter. We sent more than 600 tweets, with over 160,000 impressions (number of times a publication is seen), according to data obtained from Twitter's official analytics tool.

OUR WEBPAGE
RECEIVED MORE THAN
38,000 VISITS
OVER THE YEAR



Anfalum closed 2017 with
1,500 followers on Facebook



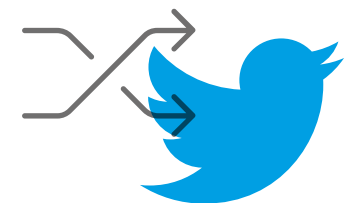
Anfalum's participation in the Dubai Fair, the involvement of our General Director, Alfredo Berges, in the Roads Association, Transforming Lighting 2017, and our two General Assemblies were widely followed. In 2017 the largest number of mentions or most important interaction in terms of impressions or interactions coincided with the presentation of Anfalum's future APP during the December Assembly, and our main Follower, that is, our most important follower given the high number of persons following her, was Joana Sanchez, @ejoana, Chair of Incipy and Inesdi.

Our LinkedIn profile now has more than 240 professional followers, and ANFALUM closed 2017 with 1,500 followers on Facebook, mostly based in Spain, of which 54% are women and 46% are men.

“
THE PRESENTATION OF
ANFALUM'S FUTURE APP WAS
PARTICULARLY IMPORTANT”



@anfalum tweets
had **160.000 impressions**



← Tweet by Marta Robles about Transforming Lighting



Anfalum's stand in Dubai

LEGAL DEPARTMENT

In 2017, ANFALUM's Legal Department continued to monitor compliance with domestic and European laws on the production, distribution and marketing of lighting equipment (luminaires, lamps and related equipment) in Spain. Particular emphasis was placed on the fulfillment of safety and quality requirements, fair competition practices and industrial and intellectual property rights.

To this end, member companies and the Association itself received advice on different areas, including unfair competition, illicit advertising, industrial and intellectual property violations, the correct labeling of products, internationalization and manufacturer's responsibility.

This year, the Legal Department continued to monitor and create awareness about national and European laws and policies affecting the lighting industry, including Ley 9/2017, dated 8 November, de Contratos del Sector Público (Spain's Public Procurement Act) and progress made in relation to Europe's Circular Economy package.

Also regarding the obligation to comply with the regulations, the Legal Department made a presentation at ANFALUM's General Assembly informing members about competition laws and the principles that must guide our actions in order to avoid unfair competition practices.

The Legal Department contributed to the development of the everyday activities of ANFALUM, by preparing and reviewing contracts, collaboration agreements with third parties and other documents, such as electoral process documentation. The Legal Department also participated in various events, most notably "Transforming Lighting 2017" and it also took part in meetings and work groups with different public authorities, entities and other associations, among them, AENOR, APIEM, CEOE, CONFEMETAL, SERCOBE, TECNALIA and the Multi-Sectoral Platform Against Late Payment Practices (PMcM), where ANFALUM serves as Vice-Chair.

We take this opportunity to remind all members that they can contact us at mbasociados@bufetemb.es or inspecciondemercado@anfalum.com, where they can send us their questions and suggestions. We will guarantee their confidentiality.

“YOU CAN CONTACT US AT
[MBASOCIADOS@BUFETEMB.ES](mailto:mbasociados@bufetemb.es) OR
[INSPECCIONDEMERCADO@ANFALUM.COM](mailto:inspecciondemercado@anfalum.com)”

FINANCIAL REPORT

11

FINANCIAL STATEMENT: BALANCE SHEET

ACCOUNTING YEAR 2017

FROM 01/01/17 TO 31/12/17

ASSETS

NON CURRENT ASSETS

Accumulated depreciation/amortisation

Intangible fixed assets

Technical installations and other intangible fixed assets

Long-term financial investments

CURRENT ASSETS

Trade debtors and other accounts receivable

Clients

Bad debt

Credit value impairment for trade operations - associated companies

Debtors

Other credit with Public Administrations

Cash and assimilated liquid assets

Cash

TOTAL ASSETS

NET EQUITY AND LIABILITIES

NET EQUITY

Own funds

Reserves

Voluntary reserves

Results previous FY

Results of FY

Surplus

CURRENT LIABILITIES

Trade creditors and accounts payable

Suppliers

Accounts payable for services

Personnel (compensation pending payment)

Other debt with Public Administrations

TOTAL NET EQUITY AND LIABILITIES

266.936,48

19.640,26

-10.626,76

1.240,26

1.240,26

18,400.00

247.296,22

207.770,78

76.555,04

112.291,35

-112.291,35

139.405,63

-8.189,89

39.525,44

39.525,44

266.936,48

266.936,48

195.904,78

195.904,78

62.912,12

62.912,12

173.101,82

-40.109,16

-40.109,16

71.031,70

71.031,93

13.845,92

48.561,92

-3.656,92

12.281,01

266.936,48

FINANCIAL REPPORT

FINANCIAL STATEMENT: PROFIT AND LOSS

AS AT DECEMBER 31, 2017

	December 2017
ONGOING OPERATIONS	
Net turnover	688.179,82
a) Sales	465.913,37
Member dues	310.594,00
Other income, advances	155.319,37
b) Services	222.266,45
Other income	222.266,45
Supplies	-161.114,20
Purchases and other supplies	-6.437,72
Work made by other entities	-154.676,48
Other operating income	15.374,00
Subsidies	15.374,00
Income from other services	0,00
Personnel expenses	-178.317,32
Wages and salaries	-146.164,02
Compensation	0,00
Social Security paid by the Association	-32.153,30
Other operating expenses	-399.277,10
Fixed assets depreciation	-4.366,88
Tangible fixed assets depreciation	-4.366,88
Other results	0.00
Extraordinary income	0.00
OPERATING RESULT	-39.521,68
Financial income	2,15
Other financial income	2,15
Financial expenses and assimilated expenses	-589,63
Financial expenses	-589,63
FINANCIAL RESULT	-587,48
FY RESULT	-40.109,16

FINANCIAL STATEMENT: PROFIT AND LOSS

BUDGET 2018

	BUDGET 2018
ONGOING OPERATIONS	
Net turnover	693.191,00
a) Sales	434.791,00
Member dues	306.741,00
Other income, advances	128.050,00
b) Services	258.400,00
Other income	258.400,00
Supplies	-164.600,00
Purchases and other supplies	-5.000,00
Work made by other entities	-159.600,00
Other operating income	20.000,00
Subsidies	20.000,00
Income from other services	0,00
Personnel expenses	-173.000,00
Wages and salaries	-148.000,00
Compensation	-25.000,00
Other operating expenses	-358.703,01
Rents and fees	-38.000,00
Repair and maintenance	-21.300,00
Independent professional services	-18.100,00
Transport	-46.700,00
Advertising, publicity and PR	-132.702,00
Other services	-11.720,00
Association fees	-50.181,01
Negative adjustments (VAT)	-25.000,00
Provision for unpaid fees	-15.000,00
Fixed assets depreciation	-1.500,00
Tangible fixed assets depreciation	-1.500,00
Other results	0,00
Extraordinary income	0,00
OPERATING RESULT	15.387,99
Financial income	500,00
Other financial income	500,00
Financial expenses and assimilated expenses	-600,00
Financial expenses	-600,00
FINANCIAL RESULT	-100,00
FY RESULT	15.287,99

MEMBER COMPANIES

COMPANIES



AFEREF
www.aferef.com



AIRFAL INTERNACIONAL
www.airfal.com



ANTARES ILUMINACIÓN, S.A.
www.flos.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



DAISALUX, S.A.
www.daisalux.com



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



ELECTRÓNICA OLFER, S.L. (MEAN WELL)
www.olfer.com



ERCO ILUMINACIÓN, S.A.
www.erco.com



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



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



FAEBER LIGHTING SYSTEM, S.A.
www.faeber.com



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



GEWIS IBÉRICA, S.A.
www.gewiss.es



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



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



GRUPO NORMAGRUP
www.normagrup.es



GRUPO PRILUX ILUMINACIÓN
www.grupoprilux.com



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



HERMINIO GONZALEZ E HIJOS (HGH)
www.herminiogonzalez.com



HIDALGOS GROUP
www.hidalgosgroup.com



HISPALÉD
www.hispaled.es



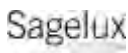














IGUZZINI ILLUMINAZIONE ESPAÑA, S.A.
www.iguzzini.es



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



INTELLUMEN
www.intelligentlumen.com

	INTERNACIONAL DE ILUMINACIÓN, S.A. www.sagelux.com
	IREGUA ILUMINACIÓN, S.L. www.ireluz.com
	LÁMPARAS ESPECIALES, S.L. www.laes.com
	LAYRTON (INDUSTRIAS VENTURA S.L.) www.layrton.com
	LEDVANCE LIGHTING, S.A.U. www.ledvance.es
	LEGRAND GROUP ESPAÑA, S.L. www.legrand.es
	LIGHT ENVIRONMENT CONTROL, S.L. www.lecsl.com
	LINEA PLUS ESSEGE, S.L.U. www.lineaplus.eu
	LUMINALIA ENERGÍA Y FABRICACIÓN, S.A. www.luminalia.es
	LUXINTEC, S.L. www.litlighting.com
	LUZCO, S.L. www.luzco.es
	MANUFACTURAS PLÁSTICAS MAY, S.A. www.lux-may.com
	MARSET ILUMINACIÓN, S.A. www.marset.com
	ODEL LUX, S.A. www.lledosa.es
	ORBIS TECNOLOGÍA ELÉCTRICA, S.A. www.orbis.es

	OSRAM, S.A. www.osram.es
	PHILIPS IBÉRICA, S.A.U www.lighting.philips.es
	PROYECTOS TÉCNICOS DE ILUMINACIÓN, S.A. www.pti.es
	RTR ENERGÍA, S.L. www.rtr.es
	SALICRU, S.A. www.salicru.com
	SANTA & COLE NEOSERIES, S.L. www.santacole.com
	SCHNEIDER ELECTRIC ESPAÑA, S.A. www.schneider-electric.com
	SCHRÉDER SOCELEC, S.A. www.schreder.com/
	SECOM ILUMINACIÓN, S.L. www.secom.es
	SELECO IMPOR EXPORT, S.L. www.guli.es
	SIMON LIGHTING, S.A. www.iep.es
	TRIDONIC www.tridonicatco.com
	VOSSLOH SCHWABE IBÉRICA, S.L. www.vossloh-schwabe.com
	ZALUX, S.A. www.zalux.com

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