

# Comfort Times

by ISPF

INDIAN SLEEP INDUSTRY

## Dreaming Afresh and Big

**22** Understanding the  
Indian Consumer

**20** The rise of  
Experience Stores

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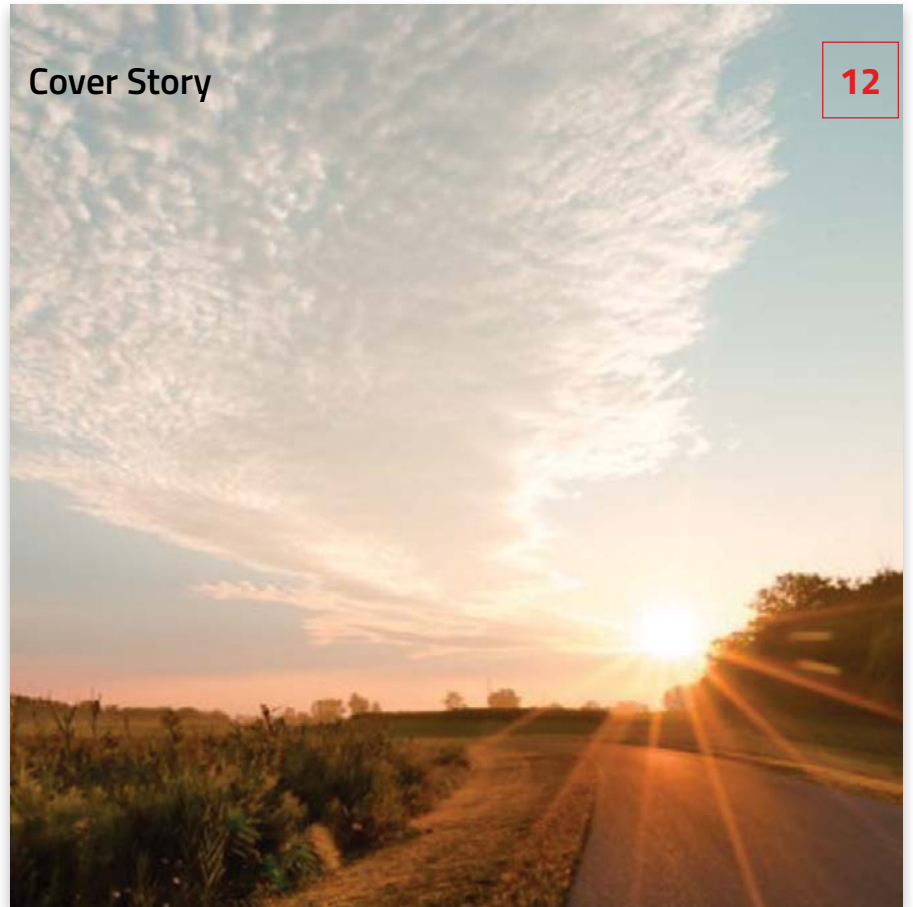
**Printed at**

Aditya Graphics and Printers

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# Thank You Note

Thank you all for taking part in the launch edition of the Comfort Times magazine. This is a momentous milestone for our industry, because we all needed a platform to voice our thoughts, to share our journey, to galvanise ideas and to carve new dreams that matter to the industry. Under the wings of Comfort Times, the industry think together big.

This is a huge and radical initiative that will etch the sleep and wellness industry in a deep, informative and thought-provoking way for many curious readers, stakeholders, industry-players and customers. Our pursuit is to bring the industry to the forefront of information and strategic spotlight, and we will aim to do this with relevant issues, themes, questions, answers, highlights and announcements; as and when they turn apt.

On this occasion, we would like to thank Mrs. Muntaha Khan Datta and Mr. Akash Datta for their initial work on the Industry Magazine.

The team of Comfort Times also expresses its gratitude for all the people who shared their valuable insights and information for enriching this issue with the hands-on depth and grip, it needed on various aspects.

Our endeavour will continue to flourish and evolve as we gather more traction and goals ahead with our forthcoming issues.

Team Comfort Times





INDIAN SLEEP PRODUCTS FEDERATION  
MANAGING COMMITTEE MEMBERS

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Sheela Foam Limited



Centuary Fibre Plates Pvt. Limited



Kurlon Enterprise Limited



Tirupati Foam Limited



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M. M. Rubber Company Limited



Eastern Mattresses Pvt. Ltd.



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## INDIAN SLEEP PRODUCTS FEDERATION - VISION

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- To promote the sleep products industry by enhancing consumer awareness on quality sleep, while setting benchmarks for its products and services.
- To represent the industry with a commitment to the society and the environment.

# FROM THE EDITOR



It gives me great pleasure to bring to you the First Edition of 'Comfort Times'. It is a dream that has been very close to our hearts.

It has been a journey full of new insights, some challenges and a lot of industry wisdom. We have covered so many issues that envelope, or will challenge, the industry – now and beyond. This issue, in itself, is an industry-retreat. We have talked, learnt, shared, ideated, discussed and caught up on what everyone else is up to – it feels both a diagnosis and prognosis.

So what we take away out of this get-together is significant – the strength and that cue to dream even bigger in the times to come. That is, incidentally, what our cover-story also captures. The industry is facing a slew of new opportunities and hurdles. These are times when we really need to invest in innovation – not just for products but on strategic-contours too.

The other areas that we have traversed in this issue will take you through enlightening and entertaining nooks and corners of the industry. You will learn about the advent of experience stores, about the evolving nature of retail-landscape and the customers we serve, about the equation between sleep

and productivity, about innovations in pillows and spring-mattresses, about the industry's historical pathways and about what's happening around.

This magazine is also an attempt to shape the sleep industry into a strong forum where players can galvanise their ideas, concerns and strategic muscle for carving a smart, relevant, agile, innovative and promising industry.

We all are dedicated to making better sleep possible in this world. And the world needs good sleep more than ever in the age of incessant stress, lives tethered to technology and fading human ties. Our future issues will ensure that we address the right questions and usher in answers that are as right as possible. We have to give the world, and the customers we work for a truly rejuvenating 'Sleep'.

'Comfort Times' is all about pushing us out of our 'comfort zones', so that we make the world out there more comfortable to sleep in.

Let us take this opportunity to think better, work better and connect better. Let us step forward in 2019 with hope, strength and wisdom.

A very happy 2019 to all of you! Time to turn the pages now.

**S. SUNDARESAN**



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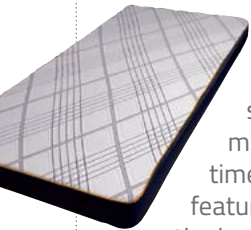
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## Kurlon launches 'SLEEP STATION' Mattress

Kurlon ushered in SLEEP STATION- what it calls a 'Mattress in a box' offering for the domestic market. The idea is to let people order it from their home and get it delivered in an easy and roll-packed mode that is portable and user-friendly. The company also claimed this mattress is specially designed 'with a responsive foam where mattress comes to its desired shape within nine minutes after 1st time unfolding'. Added features, as stated during the launch, include dust mite barriers, insect free qualities, absence of mercury, lead etc. and usefulness in extreme conditions like natural and man-made calamities. As CMM Ashutosh Vaidya mentioned in a statement, "With the shift in online shopping, we are giving our customers an unmatched sleeping experience with the benefits of ordering Sleep station from the comforts of their home."



## Duroflex receives \$22mn funding

A huge PE (Private Equity) investment has happened with Lighthouse grabbing a minority stake (about 25 percent) in Duroflex Pvt. Ltd. As per media reports, the PE player has put in about \$22 million. This is being perceived as money that will fuel the mattress major's expansion plans and new store footprint. It is

an investment of primary capital and comes after private equity made a considerable investment in another mattress giant Kurlon in 2015. Reports indicate addition of about 500 exclusive business outlets (EBOs) as possible use of the investment made by Lighthouse.



## India finds new mattress for babies

Century Mattresses threw a new hat in the ring with the launch of Beddy-01, an exclusive baby and child mattress range that purportedly gives a sanitised environment for special care of an infant. Uttam Malani, Executive Director, Century Mattresses sounded upbeat about the prospects ahead and stated – "Century Mattresses wanted to take the first mover advantage by researching the field of child sleep and bringing specifically designed sleep solutions for babies and children. In the long-term, we are expecting Beddy to contribute 10-15 percent in our revenues." Guess who got the first Beddy? Yes, Tennis star Sania Mirza's new-born baby boy Izhaan. So a lot has made it to newsreels and so much more is about to take shape by the time we roll and turn a new page soon. Get up on the right side of the bed and see what's next!



## Serta Simmons sues Casper

The world of legal drama is a two-way street. Casper itself was sued by Serta Simmons Bedding LLC over patent infringement.

The suit has been settled now.

Interestingly, the settlement came after a judge's dismissal of the lawsuit.



## Casper sleep sues Level Sleep

Lawsuits are in the air. Fresh from the can of popcorns is one where Casper Sleep sued a competitor, Level Sleep. The allegation is about misleading customers and making questionable claims while talking about health benefits of its mattresses and pillows. Some excerpts from the lawsuit say that, "Defendants have created a lucrative business built largely on deceiving consumers into buying their products instead of Casper's." Casper's suit against DreamCloud Holdings LLC also puts forth allegations of use of an unreliable survey for making such claims of superiority and pain relief as well as sleep improvement.



**A lot has happened in the last few weeks - worth reminiscing and picking lessons, healthy gossip as well as insights from. If not news, dig into some views and cues. You can find a slew of headlines – from court-room battles, bankruptcy bells to new launches as you navigate through some top stories. The sleep and wellness industry has been up to a lot of action – for good and not-so-good buzz both. If you do not want to miss what's been manifesting around, well, just jump on.**



## Mattress Firm is in trouble

France-based and a US major chain, Mattress Firm has been through sleepless nights of late. After CEO Markus Jooste made his way out, and auditor PwC came in for a probe, the next big jolt was that this giant - that has 3,500 mattress stores - is about to wrap up 700 stores. This will be part of some

reorganization effort. Experts have observed that things have been downhill since the acquisition of Sleepy's (that came in with over 1,000 stores) and a pricing conflict with its top supplier Tempur Sealy. Resignations over imputations of accounting scandal made some key top brass reach for the exit door too.

## Amazon to launch AmazonBasics

Dunno if this counts as news or a cat's bell? But yes, Amazon is making its way in the mattress market with initial offerings like AmazonBasics memory foam mattress and Rivet (from a furniture brand owned by Amazon). Walmart has also launched its Allswell mattress.



## INDIAN SLEEP INDUSTRY

# Dreaming Afresh and Big

The way consumer perceives and buys a 'Sleep' product has undergone massive leaps. Organised segment now has one-third market share

**W**ho could have thought that one day 'Sleep' would become a product, a valuable commodity, or best, an experience that will translate into millions in revenues and wonders in innovation.

If the word 'Sleep' was not an industry in the history of industrialization and consumerism, then it would have definitely become so by the time we crossed the threshold of the 21st century – with all its stress, health repercussions and lifestyle burdens.

In any case, it is a burgeoning market now. On a global level, it accounted for \$27 billion at the last count and is slated to touch \$43 billion by 2024 (numbers from Zion Market Research tell more). The way housing has grown, aspirations of new-age customers have changed and the concomitant growth seen in the hospitality market – all these factors have contributed to new inflection points for the sleep industry. When interpreted from the numbers presented by P&S Intelligence, the global mattress market growth forecast shows a value of \$38,976 Million to be achieved by 2023.

When we look at India, a Ken Research report “India Mattresses Market Outlook to 2018 - Driven by Surging Demand for Mattresses with Advancing Lifestyles” a major growth driver for the mattress market in India has been shown to be the country’s growing urban population. A segment that is ready to spend considerable amounts for their luxury and comfort, as per what the report surmised. This is something that is also attracting major global players for making investments in the industry here.

Even demonetization has been a catalyst of sort. What a Bonafide Research report showed in ‘India Mattresses Market Outlook, 2022’, the residential mattress market - that makes for about 78 percent of the total mattress market – has gained from the housing demand that followed the decrease in prices in the real estate sector seen recently. Demand for new homes came about strong and fast and this has opened ripe opportunities for the mattress industry.

If we go by a 2017 McKinsey report, the sleep-health industry - that includes bedding apart from other products like sound control and sleep aids or drugs - could be anywhere between \$30 billion and \$40 billion in 2017, achieving a pace of over eight percent a year.

The product, of course, has been at the forefront of all the fuel this market has galloped on. It has been changing so much – from a fastened cloth of the yore to a case that wraps foam rubber, springs, coil, cotton, quilt, straw and what not.

When Futurologist Ian Pearson peeled off the findings of an independent report (done for Travelodge), that investigated the experience of sleep in the future – year 2035, what really jumped out was this revelation – “The 2035 hotel room will improve sleep quality by emulating the home environment or even directly relaying it, so that individuals feel they are actually at home in bed with their partner.”

And we do not have to wait till 2035 or for a future-proof hotel room to see how ‘Sleep’ is changing - as an industry and as a product. The big bang is happening right now – and 2019 is telling us a lot about how 2020 is going to turn out.

**Deepak Mehta from Tirupati Foam Limited is upbeat about the industry when he captures the present and future scenarios both. “Mattress is a product that is growing in demand and I believe that as per the current rise in buying capacity witnessed in the market, this space will continue to proliferate.”**

### Turn the mattress upside down – how far we have come

Deepak Mehta, Executive Director, from Tirupati Foam Limited is upbeat about the industry when he captures the present and future scenarios both. “Mattress is a product that is growing in demand and I believe that as per the current rise in buying capacity witnessed in the market, this space will continue to proliferate.”

Purushottam Malani, Vice Chairman (ISPF), Century Fibre Plates Pvt Ltd echoes Deepak Mehta’s views. “The graph of the mattress industry is certainly going to move further upwards. The industry is crossing a YoY (Year on Year) clip of 10 percent, which is more than what GDP is growing at.”



Deepak Mehta also notes how consumption patterns have improved in the recent past. Mattresses of higher thickness have seen a new tide. Similarly the buyer is now graduating from low-category products to high-category ones. He also points out how manufacturing technologies have been evolving to keep pace with the new demand landscape.

What he reveals is significant in terms of determinants of future growth. It is incidentally also observed in other market-watcher reports that even a daily-use product like the mattress is gaining from a growing level of health awareness among consumers and more, with a rise in disposable income. P&S Intelligence has culled out signs that consumers are willing to pay extra for health-enhancing products and better sleep quality now which can push the sales of premium mattresses in a considerable way. This is not something that is happening in developed countries alone. Even Asian buyers are increasing their mattress budget for a switch to technologically-advanced mattresses instead of traditional cotton-filler mattresses. This is a good tide to tap for smart and futuristic market players in mattress space.

Sleep is one of the most significant part of human lifecycle and mattress becomes an integral & critical product accordingly, reckons Archit Gupta, Managing Director, Real Inner Spring Technologies Pvt Ltd. “As awareness about sleep



and importance of using a better mattress for better sleep is coming gradually, a direct correlation on our sales of higher-end mattresses is getting noticed in the last few years. We hope that this trend will improve. I am sure that the time and collective efforts from mattress companies made for sleep awareness will play a huge role."

The way consumer perceives and buys a 'Sleep' product has also undergone massive leaps. "Their appetite vis-a-vis product variety has changed. Just 7 to 8 years back the market was dominated by old-format mattresses but now there is demand for new and softer versions like spring and comfortable foam ones." Purushottam Malani observes that another welcome change is a shift from one segment to another. "The industry is generally sliced into two segments organised and unorganised. The first one makes for one-third of the market while unorganised players scoop out two-third of the market. What is refreshing is the growth that organised category is experiencing and it is reasonably faster than their unorganised counterparts." He underlines this change as a positive sign for the industry.

A Ken Research shows that India is, indeed, dominated by small and unorganised players. These are the ones that specialise in coir, cotton, spring and foam mattresses – a category that makes up for about 80 percent of the country's requirement for mattresses.

The report outlined that the spring mattress area is still in a nascent stage. This constraint has been seconded in reports from Bonafide Research figured out that mattress is predominantly an unorganised market in India dotted heavily with regional players.

Archit Gupta resonates the view. "The mattress industry of India is highly unorganised. The main reason behind this is that we are a subset of Furniture Industry which, in turn, is not organised on the sizes of bed they manufacture."

As to the key segments that make up this market – residential and commercial, what is encouraging to see is that the commercial segment showed about 50 percent (P&S Intelligence) share of revenue in the global market in 2017. Here, hotels have been noted as main end-users, although hospitals and other institutions also make up the commercial segment. However, increased purchasing power with an emphasis on better home spending is also going to accelerate the home-owner side of the market.

### Major categories of mattress market based on type

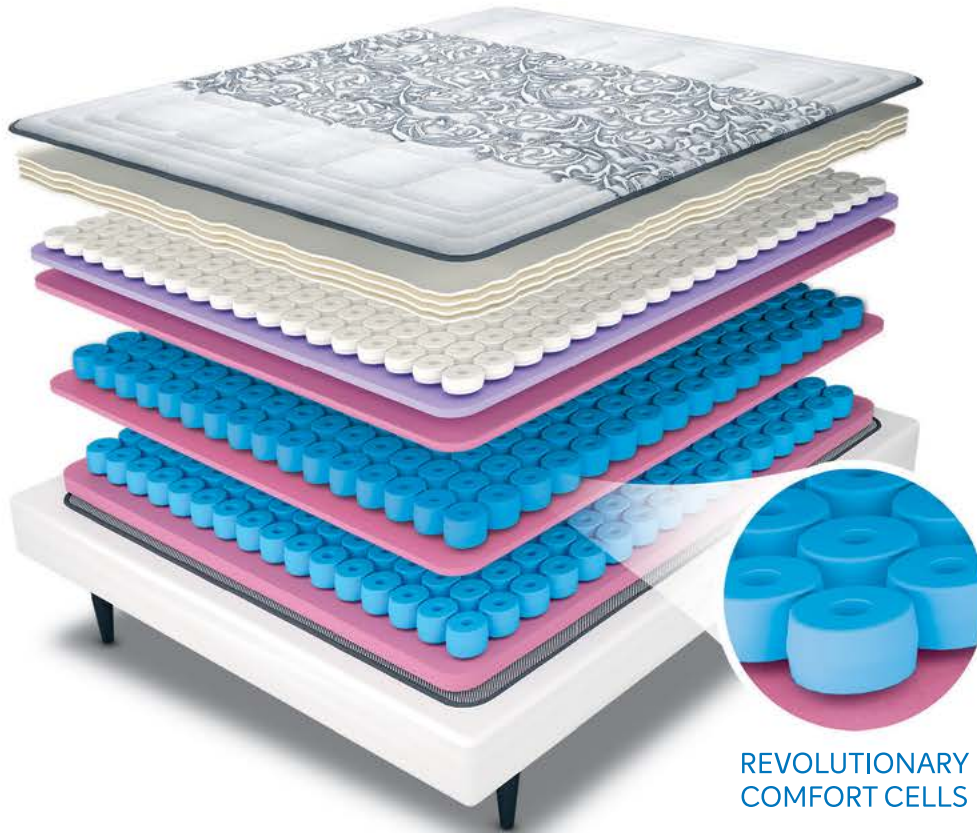
- Rubberised coir
- PU Foam
- Spring
- Memory Foam
- Rebonded Foam
- Latex

It's a two-pronged effect. Policy interventions like the 'Housing for All' scheme by Indian government are spurring housing demand and to add to that traction, there is an uptick in the marginal propensity to consume. That, in turn, helps the tourism industry, and further the hospitality sector. In total effect, spending for mattresses with high replacement rates helps the industry to new growth frontiers.

In terms of product, the innerspring mattress has been a hot favourite from what some industry watchers have gathered. It made up for over 20 percent of volume sales in the worldwide mattress market. Research firm P&S Intelligence also reckoned that a growing awareness among consumers around health factors is making the market lean towards mattresses such as memory foam. "They conform to the user's body and helps in relieving body stress and a muscle pain, the demand for memory foam mattress is expected to grow significantly, during the forecast period." The study indicated. **CT**



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maximises Air Flow, keeping  
the mattress fresh



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**Memory Foam** for  
superior comfort



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# Reference-Point Learning from International Counter-parts

**W**hile the industry has demonstrated compelling progress, organic evolution and innovation in India; it never hurts to look around and see what's happening in other parts of the world. Brands well-entrenched in key markets abroad have been dealing with new strategies and products, as well as with new rivals. Those are worth taking a peek at. Such brave, and objective, assessments can help tremendously on what can be done better here.

First thing - the \$15 billion industry abroad is not immune to the challenges of the new world too. Online and technology-positioned start-ups such as Casper, Leesa, Tuft & Needle, Purple, Eight etc. have started making dents in sales of international mattress brands since 2017 alone. Mattress Firm's example is an apt one to show how fierce competition can contribute to store-shut-downs at a company that once enjoyed a wide footprint of physical stores. The impact is deep when advent of online and smart-technology-based

players is combined with scathing discounts and free trials – that too, in the face of those ever-spiraling costs of marketing and commodity as well as pressure from imports.

But wise, and long-haul, players do remember that cutting quality to match online discounts is not the way forward. Nor is the idea of being complacent on product innovation.

More so, when innerspring mattresses- yes, the most common type – have shown the lowest levels of consumer satisfaction (only 63 percent of owners were seen satisfied) in comparison to the 81 percent number seen with memory-foam owners, and to the 80 percent number observed with latex owners, as per Statistic Brain figures. Futon owners, too, showed a good 75 percent number in terms of satisfaction with their mattresses here.

As figures from Statistic Brain have indicated, 90 percent of the mattresses owned in the United States were seen to

be traditional innerspring products and when online players offered smarter foam, it is not hard to guess why customers got attracted there.

The headway that new players have made tells a lot about what customers want – like what Casper's success with compressed and out-of-the-vacuum packaging says, and what Purple's creative leaps with design and marketing have taught old-tier players. Helix is also a good example of how customisation done by an algorithm makes it hard for anyone else to replicate what it sells. The number of variations on foam that Vita has come out with, in just one year, is also quite riveting. Another example is that of Dow that is betting big on recyclable materials and sustainable mattresses. Bed-in-a-box format is going good for online players but it can also push offline players to innovate more on portability, ease and convenience when a customer buys a mattress.

It is time to think beyond pure



foam, perhaps; and to think of bouncy-options, partially-sprung products with better feel and resilience, mattresses with hyper-elastic layers, new-generation memory-foam and high-density polyurethane foam. Start blending in microclimate, ergonomics, foam recovery, breathability, climate-consistency, temperature nuances, airflow aspects and customisation too. Players, specially legacy firms, cannot get left behind on electronics and intelligence that can adjust moisture and ventilation. These are strong propositions of digital challengers. The rise of hybrid mattresses - with more than one layer and functionality in a mattress - in international markets, further, corroborates the need to move to new product-ideas.

What can also be done better is to match the new-challengers on technology, bed-in-a-box formats and start selling sleep as an experience; instead of, as a commodity. Mattress players like Tempur Sealy International are certain that promotional pricing is not a sustainable tactic. The good sign, that some established traditional players and industry analysts have smelt is this – mattress is still a touch-and-feel buying process and that explains why even the digital breed of players is scrambling to open offline stores, including the ones left around by bankrupt players.

The new footholds that pure-play furniture players (Ex – Dream Shops from Jerome’s Furniture in California)

## The Asia Pacific and Europe – came up as regions with the highest hotel occupancy rates of nearly 68 percent in a Zion survey

are making by opening mattress-only stores are strong hints that the industry needs to focus on the channels of distribution with a fresh approach.

These shifts cement the stronghold of a good store, a good product and price-transparency. No matter how fast or cheap an online player sells a mattress, the charm of a good-quality mattress sold in a nice way (with salespeople who respect privacy of prospective customers when they are trying out a bed) never runs old. To add to that, legacy players can start investing in technologies like smart foam or sensors or better manufacturing. Using other avenues, along with old-school distribution approaches, would also be a good idea ahead. Note well that it is being seen in the USA, how more and more people are consulting a sleep-specialist before shopping for a mattress.

It is smart catering to people with the needs and specific expectations they have. As per an IBISWorld report,

consumers under the age of 35 account for 35 percent of the mattress buying clientele. As to those between the ages of 35-54 the number is 32 percent; and for consumers age 55 and older, it is 33 percent. One has to sell the product as per the buyer and tailor to the nuances these brackets come with.

It is also a good time to relook at exorbitant, and untenable, product mark-ups – which, by the way, can be as high as 12 times their overall manufacturing costs (and a big reason to tempt so many online mattress brands today) according to Cornell University.

There is not less but more hope for traditional players now. May be, the industry can get support from foam suppliers and tier-3 stakeholders too, because that will drive true and across-the-cycle renovation.

The influx of pressure from new formats and sellers is a good nudge for the industry to renew itself. Remember how Simmons pumped up 87 percent of its revenues domestically after a bankruptcy in 2010?

Let us not forget that forecast from Global Industry Analysts, Inc. wherein the Asia-Pacific region has been slated to be the fastest growing market for the mattress industry (a forecast CAGR of 8.1 percent with potential revenues touching \$39.4 billion in that time-window). The potential for the industry to grow and re-invent itself is ripe and prolific. Despite the roadblocks. **CT**

# Challenges that persist

Indian mattress industry ‘still far behind’. Major reasons for this diagnosis can be attributed to a conspicuous lack of awareness in Indian consumers - about the significance of using a mattress

Every industry has its fair share of challenges and struggles. The same evolution path is working for this industry too. More so, when a country like India, with its huge population, is still mired in low consumption and low-format numbers.

“One of the biggest challenges we face in this industry is non standardisation of sizes due to an unorganised furniture industry. This is one threat which needs to be addressed in a timely manner to protect the mattress industry. This can happen through some

initiatives by furniture associations or industry groups as they join hands in standardising sizes of their beds." Archit Gupta underlines the issue of market fragmentation again.

To add to that, the entry of online players and specialised stores is bound to give sleepless nights to incumbent players soon. The arrival of Ikea in Hyderabad is a case in point. Purushottam Malani adds candour to his confidence and is quick to reckon that within a few months of operation, the global store has made some dent in the market. "They sell worldwide and have a lot of innovation and pricing-muscle up their sleeves. They are going to upgrade the market in their way here. It is an interesting trigger for the overall industry to up the ante."

Archit Gupta chimes in here and avers that new-age challenges of online sector and big-format outlets like IKEA will challenge market share of retailers, hence, making it critical for solid steps to be taken on this issue. Logistics and SKU (Stock Keeping Unit) management is nothing short of a nightmare in this industry. As Archit Gupta explains, "Internationally, we have five to six sizes and all mattresses are made according to these limited sizes which suits everyone. In India, we have 24 sizes in printed price-list and the amount of business we get is limited. We get sizable business from non standard sizes."

That can be a slippery challenge to handle. Any decent player that has a product range of 30 to 35 options, with about 20 different sizes, faces tremendous headaches in shipping an average of 600 SKUs to remote locations. Purushottam Malani also avers that there is a change in the expectation of the retail customers in the span of last five years. "These customers need a better experience and feel; and not just a shopping errand. Most manufacturers, have, hence got into the space of exclusive showrooms now. This is where the product is allowed to be 'felt'. The introduction of free-trial period that Ikea has initiated – that is also bound to inject changes in the market.

Purushottam Malani points how in developed countries the mattress consumption happens for one in every ten people. But the same for a country like India has hovered around one in 50 people. That means that there is still a lot of room for per capita consumption to grow. There is a huge and untapped potential for comfortable versions of mattresses too instead of traditional ones.

Deepak Mehta does not dismiss the arrival of experience stores as a palpable shift in the market. But when he weighs in the impact expected (or feared) from online challengers, he considers it not a strong threat. "It is not the same feel and experience as one gets when buying from physical store."

A Bonafide Research report calls the Indian mattress industry 'still far behind'. Major reasons for this diagnosis can be attributed to a conspicuous lack of awareness in Indian consumers – about the significance of using a mattress. They still do not perceive an investment in the mattress as an investment for one's health. The report calls India as still an emerging market for mattresses where good quality is being sought at lower prices. What is also a reason of concern



**A residential user, on an average, changes mattresses in 9-10 years, while the hotels change mattresses in around 5-6 years (P&S Intelligence)**

is lack of attention from customers on all technological advancements that have been progressing.

### Before you head on

In conclusion, the industry is at the cusp of a huge and deep change. The advancements and marketing shifts that are taking shape now are going to have visceral effects on the industry's future. Changes in product – from design, consumer needs, to manufacturing breakthroughs – are also going to transpire into a new face of the industry.

Archit Gupta is excited about the role technology might play here soon. "We see the mattress industry as a fluid industry and we upgrade our models almost every year since last four years of our working on King Koil brand. We see so much scope in improvement in products, production, POS (Point of Sale) experience and many related fields where technology-led improvements are substantial. They are adding to better consumer experience from our company. We see that deployment of new technologies will be a key differentiator between us and our competitors in future."

In fact, McKinsey is rooting for and recommending private-equity investment action in this space. It spells out the fresh opportunities that have popped for private equity firms by pointing at the benefits that are to be gained and the way which the sleep-health economy can offer robust investment opportunities. That is – along with growth opportunities for their consumer-focused portfolio companies over the next several years.

The view from the other side of the bed is equally sanguine and ruddy. Industry veterans like Purushottam Malani are hopeful and eager to see what comes next. "Mattress is not an essential product, and for a low-category consumer durable market to change into something high-involvement from a customer perspective – that is going to catapult us a lot."

And those are really sweet dreams! **CT**





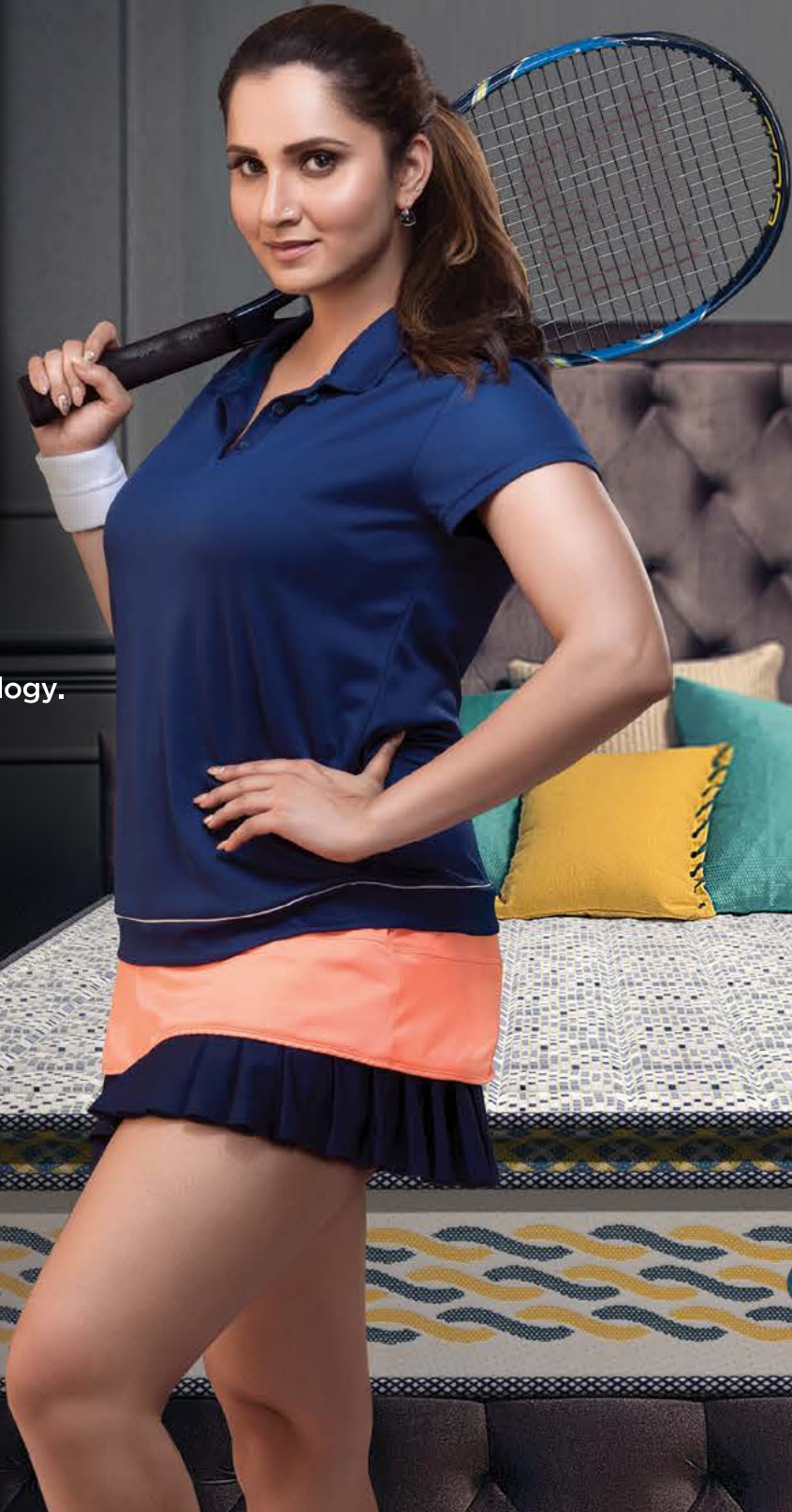
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# The rise of Experience stores

A mattress is no more – just a mattress. It is 'Sleep'. That's how high and special a customer sees it. And that explains why mattresses are being sold as experiences

**R**emember the lovely way Wilson Mizener described it? "The amount of sleep required by the average person is five minutes more."

Imagine what it is like being in a mattress store? There is a plethora of options to pick from, with most of them looking indistinguishable and equally-boring. There is, perhaps, a salesperson breathing down a customer's neck. There is no privacy or time to actually sleep on a mattress and experience how it feels.

How can any customer determine the hardness or softness or the real feel and body-compatibility of a mattress – something that is going to define his/

her sleep experience – in a store that is nothing short of a shelf?

Guess Neil Saunders, the managing director of GlobalData Retail was hitting the nail precisely on its head when he said in a media report: "Many mattress stores are old-fashioned and take a hard approach to selling."

Saunders pointed out how and why 'fun' was the main thing lacking in these stores; and why buying a mattress should not be a dull event even if it is a serious and expensive purchase that consumers are going to use for years. Some players have heard these bells of alarm and opportunity even if old-school mattress sellers have been sleeping.

## The New Avatar of a Mattress Store

Look at Sleep Number's brand-new store in Manhattan. The place is nothing like a typical mattress showroom. There is a lovely dance between technology and a thoughtful, open design flowing here. It is a place where New Yorkers can come and select what they like from an experience context – not from a commodity context.

Something that Casper has also been up to in the USA. Its radical concept called 'The Dreamery' is where it has been seen charging \$25 for 45-minute naps, and providing fancy pajamas, Instagram-brand-favorite facewash, and meditative soundtrack plug-ins for people who walk into these stores. It is fine selling a nap over a mattress because eventually it is going to be about sleep.

Anything and everything from design, to technology accessories to mock bedrooms (complete with duvets, pillows and sheets along with a mattress), aesthetic designs to luxurious ambience is being tried and invested in by futuristic players. The experience stores that are emerging fast in markets like the USA and the UK are not selling sleep 'as a product' anymore. They are selling sleep 'as an experience'. It is not hard to guess why.

## Time for India to get out of bed

Leading Indian players have realized



the inevitable power of experience stores. Names like Kurlon and Sleepwell know the impact and difference that an experience store can usher in. These pioneers have started entering this new playground of experience stores in their continuous pursuit of adding customer-centric innovation in the space. They are strongly exploring this new concept with notable investments and compelling strategies.

Sell better sleep. This is what David Perry concluded in his 'A retail bedding report card' in 2013 when he graded the shopping experience of mattress buyers. In that report, it was noted that 85 percent customers would return to buy for wide/good selection, a clean store, and a knowledgeable salesperson.

Cut to 2020 and it is not just the US market but also the Indian mattress market (estimated to touch Rs 10,000 crore by 2020) that is witnessing customers who want more reasons to even visit a store.

This is evident in the influx of digital natives and foreign experience-maestros like IKEA. The frayed market is about to confront a totally-unexpected, but a long-overdue, game-changer in the form of experience stores. That's the weapon that new players are going to use to challenge legacy brands with.

The free-trials and innovative models that start-ups like Wakefit have embraced are just tips of the iceberg here. Wakefit took note of how it takes at least 7 to 15 days to adjust to a new sleeping surface and thus, offered a 100-day trial policy. It never suffered huge returns (almost less than two percent) and that shows why getting to experience a mattress is a huge unmet need of the Indian customer too. The company has been in pilot with an experience centre in Bengaluru.

Then there is SleepyCat that is aiming to make a dent in the Indian market by addressing the overwhelming mattress shopping-experience here. Its founder, as shared in some media bytes, started this company after watching the confusion that a typical Indian



customer faces. The confusion can be so daunting that s/he may also end up buying the mattress that s/he hates, and that's only a good sign for someone new in the market to leverage, not for an established player.

It is time to really reflect on why Sleep Experience stores are all the rage in the US, UK and Australian markets. What makes people ready to book slots of 45 minutes to take a nap in sleep modules? Why are the lounges that Sleep Number is putting up rising? Why is a new player like Sunday enjoying the same love for lounges in India?

These are clear signs that the industry needs to flip the mattress of complacency and invest in selling 'sleep as an experience'. Players like Sleepwell, Peps etc have started to tweak their retail stores to give an experience to their customers. "We need to combine selling sleep and putting up experience stores in order to attract consumer towards branded mattresses," as Raghav Menon, CEO Mattress Division at Sobha Ltd stresses upon so rightly.

But good sound sleep, as a concept, has not caught up with the bulk of the population. They all still depend on their local neighbourhood gaddi-wala for coir

or cotton-filled beds which are then spread on the floor or on a cot.

The only way that the industry can match the onslaught of online-retail and digital challengers as well as shake people off the fatigue of mattress-buying is by changing the way it looks at sleep – and across the value chain, from labs to factories to stores to customer beds.

As Casper CEO Philip Krim quipped in a media interview once, "Casper stores are the antithesis of traditional mattress store experience that is notorious for sky-high markups and aggressive sales tactics. We are reimagining how people shop for sleep by listening to customers to create an atmosphere where they actually want to visit."

Experience stores are more than mattresses. They are about sleep. They are about immersion. They are about creating a community. Now when the online market is already capturing around five to 7 percent share of the entire industry, legacy players have all the more reason to reckon experience stores as more than 'another annoying' investment. It is an investment into those precious 'five more minutes'. And those minutes always count. **CT**

In the early 90s when India was in the throes of liberalization, MNCs excitedly made a beeline to catch this awakening but found that the Indian consumer is very tough



## Understanding The Indian Consumer

In the early 90s when India was in the throes of liberalization thanks to an IMF induced crisis, Gurcharan Das' book, India Unbound in 2002 kept up the hope of the Indian middle class voracious consumers in India into the third largest economy after US and China. For a country which had IMF at its doorstep threatening to recast its economic fabric 11 years ago, Das, the chairman of P&G in India, was a messiah. But the elusive Indian consumer is still that, elusive. The saga continues.

Without looking specifically into the mattress buying patterns of the Indian consumer, let us take a quick look into the general buying behaviour. The question literally is where do we start. Well, since it is the age of the online shopping where even our industry is betting on, let us look at this sector. A 2017 study done by SAP Consumer Insights Group shows that 50 percent of Indian consumers shopping online is likely to abandon the shopping store after browsing and adding items into their cart. It further says that almost 30 percent are likely to keep items in

their shopping cart without checking out for over 3 weeks. Some of them are conscious but are not able to make their mind while some of them forget that they have something in the cart. If the ecom companies in India are kept on tenterhooks then it comes as no surprise.

Brands, both Indian and international, will do better if they tag along with the typical householder to a market during their shopping journey. We did an impromptu, albeit anecdotal study to find that even the shopper feels inadequate selling and haggling with the buyer. That's part of the Indian psyche. And the SAP survey confirms this view. Over 45 percent of the respondents to their survey said the the troika of price, discounts and promotions are key to online buying.

There is a definite movement in the Indian consumer consumption pattern. According to a study by BCG, the number of households in the affluent category, annual gross household income of Rs 10,00,000 - Rs 20,00,000 bracket,

is moving up. So is the number of households in the elite category over Rs 20,00,000 bracket. Obviously, in terms of experimentation. Consumer is buying new category of goods, traveling abroad more, and yes, saving significantly more than her counterparts in the US and other countries.

While the drivers for this change is the usual suspects of urbanization, rising affluence, increasing penetration of mobile network offering an unprecedented convenience factor, the increasing brand perception is key for our industry. According to BCG, 30 percent of the households buy a "good" because they perceive it to be "better". With time this population is only going to increase. This is sweet news for our industry.

As per a study by IBEF(India Brand Equity Foundation) Indian consumer is spending maximum on food, housing, consumer durables, transport and communication sectors. A study by Anupama Dave of the Marwadi Education Foundation on Indian consumers' food



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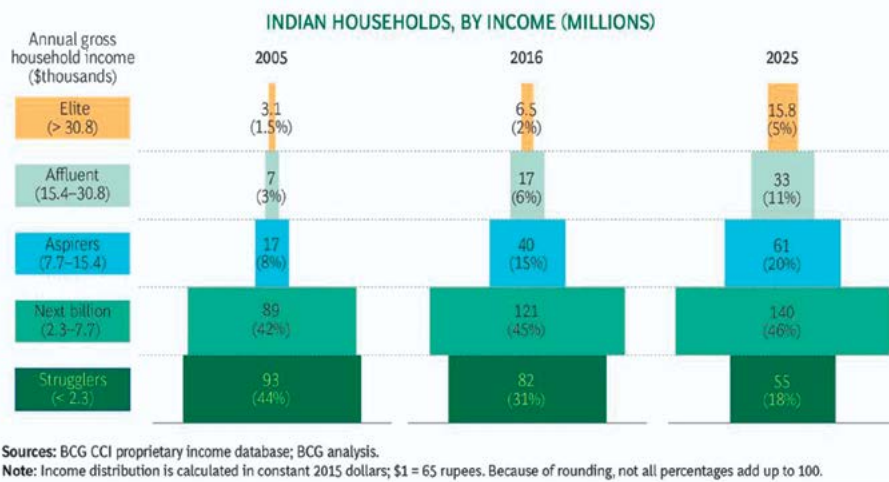


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**EXHIBIT 1 | In India, Income Distribution Is Evolving as Affluence Rises**

related items informs that more and more youngsters consider food as fun. They are taken in by the *convenience food* segment making them one of the most prolific consumers.

“Their preferences have changed from home-cooked food to fast and ready to serve food. The young consumers are passionate about visiting fast food outlets for fun and change. Besides that processed foods are accepted as alternative to the home cooked food because of the convenience it offers,” says Anupama Dave.

The question is what lessons can we take away for the sleeping products industry. The studies point at some interesting factors that influence our consumer. The first and foremost is the fact that consumer is willing to “pay more” for a better brand. Second, consumer considers *convenience* as a plus and does not mind indulging.

Our industry can leverage these two points to launch a perception changing campaign. The factor of pricing, discounts and promotions has to be part of the mix since that is what drives the Indian consumer both offline and online.

### Wooing the sleep deprived

So how are companies planning to get the average sleep deprived Indian to bed. Well, for one there is a new found zest among youngsters who are doing new-age sleep startups. And investors are listening.

It's OK to sleep and let the world whirl around. Get the Indian consumer to appreciate the following rules and the brand that can achieve this will win the battle to the consumer's heart.

- » Respect sleep as your tool for high IQ and good learning
- » Free running sleep can help you resolve many sleep problems
- » Biphasic sleep schedule is probably the healthiest schedule for creative people
- » Do not wake up kids for school; if they cannot wake up in time, let them skip a class or two, or consider homeschooling
- » Let babies and young children sleep on demand, co-sleeping is a great idea (even if many pediatricians will tell you otherwise)
- » Exercise, learning, and sleep are your best tools for brain growth!
- » Avoid regulating sleep and alertness with substances, esp. sleeping pills, alcohol, illegal drugs, nicotine, and caffeine

Source: <https://www.supermemo.com/en/articles/sleep>

The more traditional players such as hospitality industry, the pharma companies are taking the path they know best. Hotel brands are offering sleep menus comprising choice of pillows, aroma therapy, soothing music and likes.

Pharma companies are also dabbling in this market with products ranging from anti-snoring products, mild sedatives, creams, oils and the likes. The electronic and lighting giants are peddling various sleep aid devices ranging from foot massagers to lighting solutions. Mobile app industry has suddenly seen a boom in sleep related mobile apps.

Is the consumer paying attention? Looks like so. There is a growing awareness about the advantages of a good sleep and people wish each other a “good sound sleep” more than just “good night”.

In Whitehouse, there is the famous rule: “Do not wake up the President”. Very few Presidents were woken up and that too when in crisis. This rule should be made for every household.

### The connect

For the Indian mattress industry there is a lesson. Selling mattress won't push the consumer into buying one. It has to sell the after-sleep experience to the consumer. A healthy individual needs 7 to 9 hours of sleep and those that do not clock would slip into a sleep debt. An average Indian is said to sleep only for 6.5 hours which may not be after all the so called deep sound sleep.

Put the lights down; snatch those electronic devices; cut the noise. These should be the rallying cry. The mattress industry should take upon itself in re-establishing the “circadian rhythm” in the average Indian.

“A deep sound sleep makes you fitter, faster and successful,” should be the rallying cry. We are somehow taken in by the hard-working, midnight-oil-burning metaphors of success that we forget that all those who did it found a way to get their deep sound sleep when they were done. **CT**



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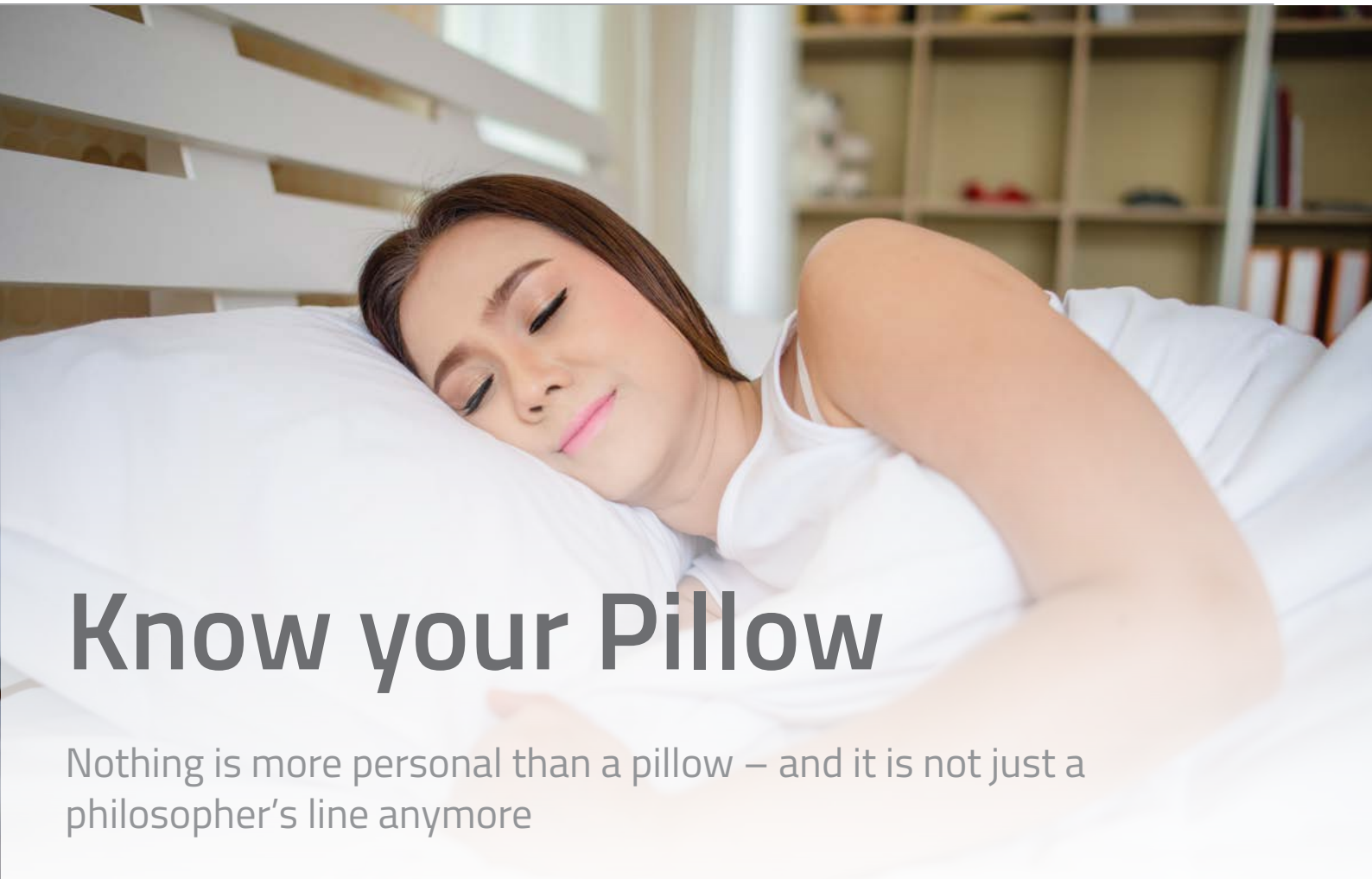
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# Know your Pillow

Nothing is more personal than a pillow – and it is not just a philosopher’s line anymore

**W**e have used them to have pillow fights. We have cuddled around them for pillow talks. We have cried our hearts deep into their soft and reassuring dens. We have picked them apart when in rage or during a pyjama party.

Pillows have been everyone’s friend in some way or another.

But the next decade is going to add more uses to that plain-looking friend. In fact, the journey towards a smarter, cooler, friendlier and intuitive pillow has already begun. The pillows of the next generation can have Mom-like detective-eye of one’s feelings and problems or can have Dad-like voice and muscle – or both.

There are so many choices and surprises tucked away in a pillow-shopping spree now. It’s just not about the pillow any more. If, as per a BSC research report, consumers are replacing

their pillows every 2.8 years, faster than they toss away any other sleep accessory (sheets are an exception), then the market cannot be complacent with just offering soft and squishy pillows. It has to grow suave and sophisticated and sensitive to what matters to a user. It is doing that. Let’s see some ways that have started emerging here to woo a user into a new pillow.

## 1. The pillow that massages

Hotels have been falling over each other to up their game in creating better guest-experiences. The result – a spillover into the pillow market. The world can now count upon pillows that offer gentle head and neck massages, helping the user drift off to sleep.

## 2. NASA-level pillows

Yes, start-ups like Hyde and Sleep have begun using technology that was under NASA’s (National Aeronautics and Space Administration) wings. The idea is that one gets to enjoy the cold side of the pillow at all hours of the night.

With a cover that can react to the body-temperature, these pillows can make adjustments as temperature fluctuates. They can make the fabric soft and calm for the user – no matter which way the mercury goes.

## 3. Snore-enemies

The use of sophisticated inserts inside a pillow can help the user stay away from snoring. E.g. Smart Nora is tapping the idea of phase-change materials for absorbing, storing and releasing optimal thermal comfort.

## 4. Skin-friends

Now if the pillow material can use micro-encapsulation, there are so many other components and possibilities that lie latent under its head-rest. Pillows can even regulate the skin’s microclimate.

## 5. Foam-heroes

The foam of a pillow is not going to be happy with just being soft and easy to maintain anymore. There are advancements around memory-foam,





ability to mould around a user, ergonomic powers etc. that are going to define future foam in a massive way.

### 6. Sweat-fighters

There are pillows around that can help to combat night sweats with innovations in cooling technology. The use of breathable material and apt gels as well as water, makes such pillows useful for people suffering with particular predicaments. E.g. Ghostbeds

### 7. Pillows and Alarm

With features for light-based alarms, pillows are also experimenting with ways to wake up users just at the right time by leveraging technology with some user-insight.

### 8. Pillow Coolers

Use of new kinds of gels, mesh covers, air flow materials, moisture controls, ventilation technologies, memory foam cores, energy recovery ways and even simple wool-filling has made pillows into coolants in their own right.

### 9. Pillows that adapt

Companies have started trying out

pillows that can change shape as per a user's body and requirements. Customisation, resilience and quick-recovery for the body are attributes that are witnessing a new leap with pillows. E.g. Savvy Rest and Talalay Active

### 10. Pillows and insects

Use of specialised chemicals and material is being tried in pillows so that they can also keep allergens, mold, bacteria and odour at bay.

### 11. Pillows that smell nice

Even aromatherapy and good odour material have found their way into some new-age pillows. Relaxing scents help one sleep better after all.

### The list is only growing

Now companies are experimenting with everything from pinhole-cored graphite gel memory foams to pinhole coring in solid memory foam or latex pillow cores and mesh-advanced covers. The idea is to soften and induce better sleep around a body. These pillows are waking up to new areas like body contours, microclimates and personal user-specific issues. They are also adept

at waking a user up the moment s/he starts snoring. They have, even, been seen to work more deeply with voice-based assistants now. E.g. ZEEQ

From pillows that can fight mold, dust, termites and sleep disorders to pillows that personalize themselves to a user's physical and biological dimensions – the world of pillows is changing faster than we can ever imagine.

Futurologists have already hinted at a 2035 pillow that packs more than feathers under its fabric. It will have soft electronics for detection of brain, REM (Rapid Eye Movement) and sleep activity. It could be armed with miniature microphones for users to talk back home when they are travelling. As we can see the sleep industry is not going to be just about sleep anymore. Pillows are playing a soft, but deep role in pushing boundaries and ushering unthought-of experiences. Sleeping and pillow-shopping are becoming joys. Unless one is looking for a pillow to use for fights or stash away black cash. For that, the good old pillow is still the best bet. **CT**

# High tailing Retail

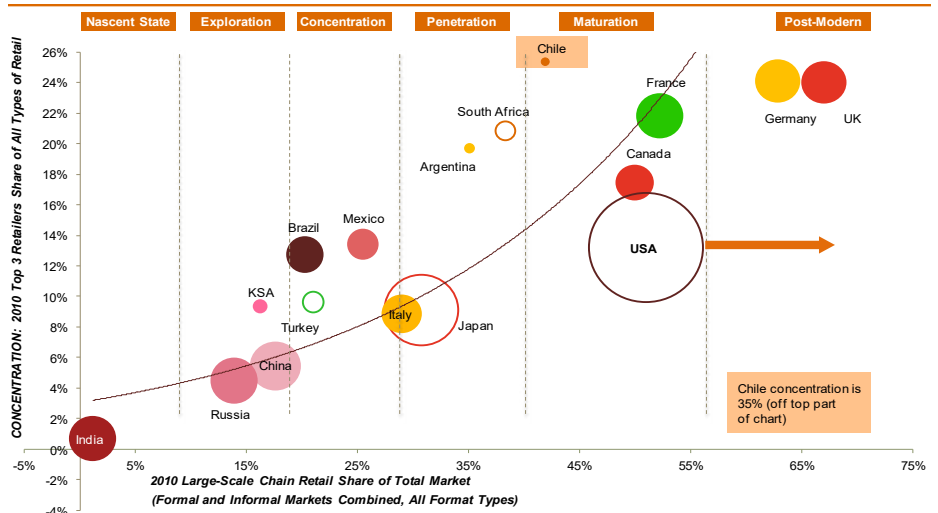
# Evolution of Retail in India

The Indian economic turnaround story is very much a story of its retail's sector. The first one reflects the other like a mirror. From the quintessential Bombay Dyeing, Raymond and Vimal showrooms of the 1980s to the hyper malls, supermarkets of today, Indian consumer has turned the corner.

India's retail sector makes up 10 percent of India's GDP and is expected to be among the largest retail sectors in the world making it the fifth largest retail destinations in the world. Indian retail is punctuated with the rapidly growing online retail which is expected to surpass many markets out there clocking \$200 billion by 2026.

Indian consumers are becoming consummate buyers. The growing affluence, rapid industrialization and the increasing influence of social media are contributing to the increasing appetite of the Indian consumer. The mobile phone and the convenience it brings to retail buying is one factor that has moved Indian retail story beyond its counterparts. India is the world's third largest mobile market.

Indian retail segment is characterized by the organised sector which makes 20 percent of the market and the rest held by the unorganised sectors. The Mom and Pop stores, the kirana stores, the



Source: Adopted from retailing 2020: winning a polarized world pwc/kantar retail

local groceries are still going strong in the wake of giant discount stores and online players. However, the strain is telling. Either these stores will become an integrated part of the larger players by providing last mile connectivity for delivery or vanish altogether.

Indian retail story is still to be completed from a policy perspective. As of now 100 percent FDI is allowed only for single-branded retail chains. For all multi-branded chains, the FDI cap is at 51 percent. Even for the single branded chains there a number of strings attached such as a sourcing cap of 30 percent from domestic market. It takes a lot of effort for foreign brands to

set up own chains in India. But the new regulations have definitely given a huge impetus to this sector. From sleeping products perspective, this means international brands can now enter India and source from local partners. [CT](#)

## Table of Share of organised retail worldwide

Country	Share of organised retail to total retail
US	85 percent
UK	80 percent
Malaysia	55 percent
Thailand	40 percent
China	20 percent
South Korea	15 percent
Indonesia	25 percent
Philippines	35 percent
India	5 percent

Source: The Indian Kaleidoscope: Emerging Trends in Retail, PWC/Ficci

Year	Growth	Function
2000	First Phase	Entry Growth, Expansion, Top line focus
2005	Second Phase	Range Portfolio, Former options
2008	Third Phase	End to end supply chain management, Backend operation Technology, Process
2011	Fourth Phase	M&A, Shakeout, Consolidation, High Investment

Source: Ernst & Young



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T.S. Sudhakar Pai, CMD, Kurlon

# Poised for 8 to 10 pc growth in the next 5 years – the industry is awake!

**T Sudhakar Pai, CMD, Kurlon** shares some gleanings about the industry from his vantage point. He also reminds - adequate sleep is often overlooked by people

**Q** Can you give us a peek into your outlook on the scenario of the Indian Sleep industry? How much has it evolved in the last two years?

The Indian sleep industry has been going through some exciting evolution in recent times. The growth of Indian nuclear-families; and the ongoing government-initiatives for increased-housing; will continue to help the mattress industry towards a double-digit growth throughout, for the next five years.

**Q** What are your expectations of key changes in the next 5 to 8 years?

The entrance of new players in the market has been a positive story for revitalising the organised sector. It has also helped in an increased awareness amongst the consumers to demand a better sleep product.

For a pioneer brand like Kurlon, this is a fantastic opportunity to leverage our existing network and experience to offer the consumers a unique value proposition. We see potential in retail and omni-channel for vertical and horizontal expansion across the industry. We believe the key to our growth lies in continuous product innovation, driven completely by consumer adoption and behaviour insights, delivering quality

products to our loyal customers and value-addition to our stakeholders.

**Q** How significant has been the rise of sleep economy, accessories' market and adjoining industries that have grown out of demand for sleep and wellness?

With a 7-8 percent growth in the Indian economy, the Indian sleep industry is poised for 8-10 percent growth in the next few years. The price range of mattress industry is also shifting from the Rs. 3000-5000 range to the Rs. 10,000 onwards-bracket. The choice of mattress in terms of material is also shifting with an increasing focus on comfort rather than just formality for a cot.

An increase in disposable income is acting as a catalyst for rate of replacement for products like pillows, cushions, bed-sheets and comforters, etc., and hence, the demand for such products is growing tremendously. For example, innovative pillows like music-pillows are becoming quite trendy these days.

**Q** Your views on the state of sleep disorders in India?

Lifestyle disorders such as hypertension, cardiac disorders, diabetes, and depression are becoming a part of the urban Indian population. While people

often stress on diet and exercise, adequate sleep is often overlooked. Adequate and sound sleep is essential for maintaining physiological balance and this is where a good mattress can play a vital role. Kurlon has launched a health range of mattresses such as Spinekare and Ortho with an aim to address some of these issues.

**Q** What is your assessment of the penetration of technology in this segment - from trackers, Internet of Things, Robotics, Artificial Intelligence, sensors, apps, e-commerce platforms to manufacturing-level changes or anything else?

Technology will definitely play a greater role in product-differentiation and value-addition. We will see technology being used to help maintain mattress conditions such as temperature and comfort-pressure to help people get maximum comfort. We at Kurlon, already use the X-sensor technology to help consumers select the ideal mattress according to their sleep positions.

Technology is already being used by allied functions to provide greater service to our customers. We will see an increased use of Virtual Reality (VR), integration with wearable health devices in the days to come. **CT**



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## SLEEP AND PRODUCTIVITY

# You can't miss out on sleep

There is a strong and interesting connection between lack of sleep and loss of work productivity. Don't sacrifice the downtime that really helps your brain to rejuvenate.

If you are one of those who wonder why new-age technology giants are putting up sleeping pods in their glitzy and cool workplaces, then you really need to read ahead. Because believe it or not, sleep is not just a perk that you give to an employee. It is a fundamental necessity – the lack of which – affects not just a person's health but his/her productivity too, and drastically enough.

There is reason, after all, that so many sleep labs and sleep centers are mushrooming all over the world. From what a report by industry researchers at IBISWorld reckoned, sleep labs are not a fad. These places, where people are going to solve their sleep disorders, have grown at a pace of four percent every year for the last five years. By 2020 the industry can be touching a \$10 billion mark.

The advent of offerings like The Sleep School, Nap York, Spa Le Ra is a good enough indication of the significance of sleep disorders and challenges that most people are facing today. Nap rooms, sleep advice experts and boutique consultancies are on the rise to tackle this growing demand for sleep and wellness answers.

Blame it on the ever-present screen and blue light, or the pressure of work and commute – but lack of sleep is emerging as a serious epidemic now.

### Why sleep matters?

Insomnia costs, sometimes as much as \$100 billion a year. But if you break it down in other ways, the effects on a person's psychological and cognitive health are good enough pointers too.

When we cut down on sleep, we do not allow our brains and body that

### According to National Sleep Foundation, apnea affects as many as 18 million Americans.

much-needed (and much-deserved) time to reboot and recover from a long day. That makes it hard for a person to get ready for the next day. The result is manifested in not just mood swings, increased temper bouts and fatigue but also a serious inability in focusing on or comprehending even small tasks at hand.

The side-effects are multi-faceted and unexpected. One can end up facing other health issues like:

- Diabetes
- Heart problems
- Depression
- Mental challenges

- Blood pressure problems
- Mortality
- Anxiety
- Chronic digestion issues

Not just that, sleep-deprived people are also noted to be lonelier than others. This affects their level of engagement and interest in any work, of course.

Sleeping well brings many advantages. Improved focus, consistency in cognitive skills and the energy to be up and about for physical and well as mental tasks – are just a few benefits of having a good night's sleep.

As a neuroscientist stressed aptly – “Sleep acts like a glue.” And this glue is important in assisting the brain to encode recently-learned information into long-term knowledge.

A study on some teens in the US cemented this insight when it found that adolescents whose sleep is inconsistent across the school week (a variation of 2.5 hours from one night to the next) show less development of white matter connections in their brains a year later when compared with those who slept a more consistent number of hours per night. And this has to do a lot with pathways in the brain that define self-control, emotion and reward processing, as Dr. Galván, a professor of psychology at the University of California uncovered in his study.

Another research from Harvard University seconded these revelations when it showed that besides improved grades, students getting a good night's sleep also show better memories, and a lower risk of obesity and less chances of getting sick.

Similarly, a research from the

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**A research from Harvard University comes out with revelations when it showed that, besides improved grades, students getting a good night's sleep also show better memories, and lower risk of obesity and less chances of getting sick.**

Michigan State University also observed that people prone to use their smartphones for work purposes after 9 p.m get more tired and less engaged at work the next day.

If these warning signs are not enough, consider more numbers that should be red flags worth the attention. Sleep deprivation is costing American companies \$63.2 billion a year in lost productivity. No marks for guessing why.

**Get into bed – for work**

How can a person work at full tilt when the body is lacking in attention,

cognitive muscle, energy and information-processing?

Learning and comprehension take immediate hits and backseats when one is sleep deprived. To add to that, having a relaxed and proper sleep (with enough deep sleep time) can equip a person strongly by:

1. Reducing distractions
2. Helping in faster and better decision-making
3. Cutting down on fatigue
4. Making better brain connections
5. Improvement in memory
6. Better retention and use of

information

7. Higher engagement and interest at work
8. Fewer mistakes
9. Higher-level brain functions

So do not miss out on the side-effects of good sleep. Let the employees have their beautiful sleep. Do not insist on being tied to, and having them tethered to, smartphones and emails all the time. Getting a good sleep is not going to hinder work, but actually going to help people become more productive and engaged.

This is important for both personal and workplace changes in the way we look at time for rest and rejuvenation. If you want your workers to learn better, perform better, feel better, and come back with a smile and a recharged look – let them charge their batteries too. Unplug today. Plug into some sleep. **CT**



# Innovation worth a word

A bracelet that can help epilepsy patients and the people who care for them

**W**hile a lot of research and chest-beating marketing announcements keep coming out about smarter beds, smarter pillows and what not, here is something that popped recently and is focused for a specific issue.

A fresh update informs that Consortium researchers have made a bracelet that can help in fighting epilepsy. Yes, as disconnected as this disorder may sound, the ramifications of better sleep diagnosis and monitoring can help these patients significantly – at least, on paper.

This can happen by timely recognition of severe attacks through indications on an abnormally fast heartbeat, rhythmic jolting movements, etc. and then helping to alert care-takers and nurses in a swift move.

## Night watch

Called Nightwatch, the bracelet was tested by the research team in 28 intellectually-handicapped epilepsy patients over an average of 65 nights per patient. It was kept focused on sounding an alarm if a severe seizure took place. There were also accommodations done in this test for false alarms and attacks.

Comparison numbers then showed detections of 85 percent of all serious attacks by the bracelet, as well as 96

percent of the most severe ones. This was also compared to a bed sensor that is working as a current detection standard, by using reactions of vibrations due to rhythmic jerks. It was shared that the new bracelet missed a serious attack per patient but only once every 25 nights on average. Absence of discomfort by patients and positive feedback from the care staff add to the good marks on the bracelet's report card.

In an update, neurologist and research leader Prof. Dr. Johan Arends was found noting that it can reduce the number of cases of SUDEP (SUDEP, sudden unexpected death in epilepsy) by two-thirds. What Dr. Arends, rightly, added was that the real impact of the bracelet would hinge on the time taken for response by care-takers once an alert is received.

## Twenty years of hard work

It took some 20 years for this bracelet to come to life when the idea found

its wheel under Kempenhaeghe and Eindhoven University of Technology. This could be a significant shift in epilepsy treatment as a lot of it depends hugely on timely-alert of an attack.

It is being hoped that the bracelet can shrink the worldwide number of unexpected night-time fatalities in epilepsy patients. Results of a prospective trial have been published in Neurology. It is worth reckoning here that the technology related to better sleep and wellness is also finding some cascading effects in realms where this can be put to better and urgent use.

Such technologies and innovations may also find applications in other medical areas and thus help the world become a better place for all kinds of people. More research and on-ground usability of technology around this area would be welcome in transcending this industry to a new level. Science and wellness are finally aligning well and this is a combination that can use radical intersections from the technology side now. Cheers to more disruptive thinking and action! **CT**



## Government Regulations

# Key concerns for the SLEEP INDUSTRY

It would be an encouraging push for the industry if there is more clarity, relevant policies and some room for reducing fragmentation

**G**overnment policies and mandates are crucial catalysts for any industry. The sleep industry is no exception. It would, definitely, be a compelling change if the industry is able to address adequate organization, taxation clarity and market sophistication with the influx of government support and intervention, as required.

So what are the key salient issues that the industry is fighting right now?

### Preponderance of an unorganised market

Most industry players are quick to point out this issue as their foremost challenge. Thanks to absence of capex barriers for manufacturing too, the industry is conspicuously dominated by the unorganised segment which translates into a half-baked market potential and some unnecessary intricacies of taxation, distribution and marketing.

“The mattress industry of India is highly unorganised. The main reason behind this state is that we are a subset of the furniture industry which, in turn, is not organised when we look at the sizes of beds manufactured.” Archit Gupta, Managing Director, Real Inner Spring Technologies Pvt Ltd spells out the complexities that arise from here.

Internationally, we have five to six sizes and all mattresses are made according to these limited sizes - which suits everyone. In India, we have 24 sizes in a printed price-list and the amount of business we get is limited. Majorly, we



get business from non-standard sizes.”

He stresses that unless, the furniture industry takes initiative on the requisite degree of standardization with rules on bed sizes, the mattress industry will always suffer on this aspect.

### Taxes and GST

While a couple of industry players feel that relief in taxation would be a welcome move for the industry, the ramifications of GST impact are keeping them up and concerned for now.

The GST implementation across all sectors is a good change as Purushottam Malani, Vice Chairman (ISPF), Centuary Fibre Plates Pvt Ltd assesses it.

But, as highlighted by industry majors in media reports, the issue of

unorganised segment shifting to the organised one is a throne in the toe here again. The industry admits that the change is too huge though and not just a tax change or a business change, but a social and a cultural change.

Since this will take its time for implementation (recall that we are talking of an industry that is almost 80 percent unorganised and which sells a product which is not exactly a top-of-the-list item for a customer), the scenario where a lot of small players are scattered all around, any on-ground impact will take more time. Specially, when people have found ways to get into exemption corners.

GST was, quintessentially, an effort to plug loopholes but for that to really manifest, the state of fragmentation in the industry will have to avowed too.



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More strictness on the part of government and attempts to bring everyone under the GST network would definitely help, as some players have noted in media interviews when GST kicked in.

In other words, equal treatment and erasure of confusion are changes that the industry can really use in a post-GST era. This will also help the tax regulators to achieve the desired outcomes at a good pace and with consistency.

### Rise of new threats

If the online onslaught and arrival of foreign players is given a serious gaze, the existing players definitely do not want to be caught blank and surprised in dealing with new challengers. Would they follow the same industry levies and regulatory treatment? Would they be at a level-playing field in the duties they pay and the rules they have to follow? Good questions for now.

Incidentally, the challenges faced by indigenous players are not different when we look at other markets too. As per some latest numbers that the ISPA (International Sleep Products Association) culled on the import figures (by the U.S. International Trade Commission) in its 2017 Mattress Industry Trends Report, countries like China, Mexico, Canada and the United Kingdom have been seen to be the leading importers of mattresses to the United States last year.

If we focus on China, it is clearly dominant here with mattress import units of 4,335,065, while Mexico stands second with mattress import units of 1,038,108. Canada showed mattress import units of 8,868, and mattress import units from the United Kingdom stood at 1,308.

But what is interesting is that when it comes to mattress as a category, China turns out to be the leading supplier of imports. These units have clocked an increase of 51 percent and the dollar value of Chinese mattress supports has been up 46 percent. Also note that the average unit price for mattress supports from China has gone down 0.3 percent,



Archit Gupta, Managing Director, Real Inner Spring Technologies Pvt Ltd

**If we focus on China, it is clearly dominant here with mattress import units of 4,335,065, while Mexico stands second with mattress import units of 1,038,108. Canada showed mattress import units of 8,868, and mattress import units from the United Kingdom stood at 1,308**

as per the report.

This is a good reminder for the domestic industry to fortify their footholds well and make sure that they are ready to tackle the import-expert dynamics – with all these new opportunities and threats – on a global bed.

### Collateral Industries

As strange as it may sound, the mattress industry is not so orthogonal when intersections from other industries are evaluated. Specially, the housing and real estate sector as well as the hospitality and travel sector would have inevitable domino-effects on this industry. We have already seen that happening after the post-demonetisation state of real estate sector. Any expansion in markets like construction, housing, hotels or hospitals is going to bring in new demand for mattresses spun out of that extra growth. In fact, according to P&S Intelligence also, various government policies that have cleared the path for affordable housing, plus impetus to home ownership as an important policy goal – all these measures have been positive changes.

The research report outlines how 'Housing for All' scheme by the Indian government, joint ownership housing scheme by Chinese government, affordable home ownership scheme by the U.K. government etc. have been drivers of housing demand globally. There is also an argument that marginal propensity to consume, that drives the tourism industry, has been impacting the hospitality sector spending for mattresses (this is specifically interesting as this category shows a replacement rate of mattresses of around 5-6 years). So even if the government does not make any direct moves for the sleep or mattress industry, the changes and incentives that happen for orbiting industries like hotels, tourism, healthcare and housing are going to show inevitable cascading effects.

All said, as an immediate concern, it is incumbent upon the industry players to ensure that the right degree of organization comes by. Purushottam Malani adds that, here, the role of the industry is more pronounced and potent than government efforts as the product category is unique and unusual – a low-involvement consumer-durable for now. Let us see if the next year shows signs and shifts of all the support and rise of organised market that the industry is rooting, and working hard, for. **CT**

Spring a Good Sleep!

# Sleep better, work better



**N**ot a 20 mattresses and 20 feather-beds could help the princess get a good night's sleep because that one single pea hidden under them was enough to disturb her comfort. We all know this popular fairy tale. A good comfortable mattress is essential for a good night's sleep. And these sleeping mattresses have evolved quite a bit throughout history.

Spring mattresses are the most popular outside India whereas within India, it is the coir, cotton or foam that rules. Spring is just having its moment of awakening. Here's a brief look at the road the spring mattress took to the napper's heart.

The spring mattress has come a long way from its origin in 1871 when the first patent for steel coil spring usage in mattresses was filed by a German inventor. It soon went through a quick iteration as box spring mattress. The

new invention reduced the lumpiness found in the older version. In 1930, the innerspring mattress appeared in the market followed by Pocket Spring mattresses. Today, we have mattresses made of foam, gel, water-filled and memory foam, the latest technology.

There is an interesting trivia involving the first coil spring mattress. This trivia is not so pleasant but interesting. When the coil spring mattress was invented one of the first was acquired by Whitehouse for the President's bedroom, obviously. President James Garfield fell ill after a failed assassination attempt with a bullet embedded in his body. Since X-Rays were not yet dreamt of, Alexander Graham Bell and a fellow collaborating scientist rigged up a device which would emit a humming sound if the device's probe's were brought close to a metal object. This device was perhaps the first non-intrusive probe. After testing the device successfully

with several wounded soldiers, the duo used the device to detect and locate the bullet in the President's body. However, the probe would emit a humming sound no matter which part of the body they brought the probe close to. The device failed. The President soon passed away due to infection. Later on, it was learnt that the device worked on others and not the President since the President was lying on a metallic coil spring mattress.

A spring mattress uses a bed of boxed coil springs and will have several layers of other cushioning material over it. The making of a spring mattress is a fascinating one. It has several specialised units such as the metal springs unit that specializes in arranging the springs, the layering unit which puts together all the layers and sews them together, the tailoring unit which prepares the clothing, covers, quilts as layers and the taping unit which sews up the sides and edges of the final bed. [CT](#)

**W**hen something costs a trillion dollars a year, it has got to be serious.

While experts, medical researchers and industry players have been chanting their worries on the increasing pattern of sleep-loss for the modern human being for many decades already, now these worries are taking the shape of a red flag on the side of employers too.

Look at a RAND organisation study on the member nations of the Organisation for Economic Co-operation and Development (OECD), and one gets to see productivity-oriented regions like the US and Japan topping the charts. But for what? For economic losses arising out of sleep-deprivation! Yes, the US suffered the highest economic losses (up to \$411 billion a year), and for Japan the number was up to \$138 billion a year. Other economically-intensive regions like Germany and the UK too incurred losses (between \$50-60 billion).

Another study resonates with these findings. One third of US adults have been observed to sleep less than six hours a night as found in a research done by folks at the Arizona State University. Through an annual, nationally-representative health interview survey, where 398,382 participants were asked about their sleep patterns - It was found that 63 percent got 7-8 hours of sleep during this period, and only 8.5 percent slept nine hours or more.

People are losing sleep - over work, over smart-phones, over new distractions and compulsions of the modern lifestyle.

The situation is not just dire in the West. Towards the other side of the atlas, Australia is not faring any better as well. As per a report published in the journal - Sleep, where both the financial and non-financial costs of sleep were reckoned, the numbers came out quite intimidating. If we consider the financial costs associated with health care (both formal and informal), productivity loss, along with vehicular and other accidental costs, besides the



# Sleep-Deprivation Costs trillion dollars a year

Sleep-Debt is a growing phenomenon and is raising new alarm bells for workers and employers all across the world

non-financial costs (loss of well-being), we can see Australia clocking a loss of about \$45 billion a year.

We have already walked through losses of \$726 billion a year when we look at developed regions. Imagine the nature and impact of losses that come together on a worldwide level.


It is not easy to ignore China and India here - the world's two most populous countries that are running on the treadmills of development by using huge workforces.

How well are these workforces equipped to handle the productivity-impact of sleep lost over work? The adjunct burdens of stress, fatigue and loss of mental bandwidth cannot be sidelined. When one is struggling with

lack of adequate sleep, the aftermath manifests over work too.

No wonder then, employers are now encouraging and insisting upon employees to catch quality sleep. Overtime is being looked down upon and so is the habit of overworking. And these new emphasis-areas are not some philanthropic move or selfless-mode switched on among employers. It is serious business.

An overworked or sleep-deprived employee is of not much use to workplace demands. The cascading effect is now visible in terms of productivity-losses and hence, employers are getting sleep-aware.

It's not just good HR. It's good economics. 



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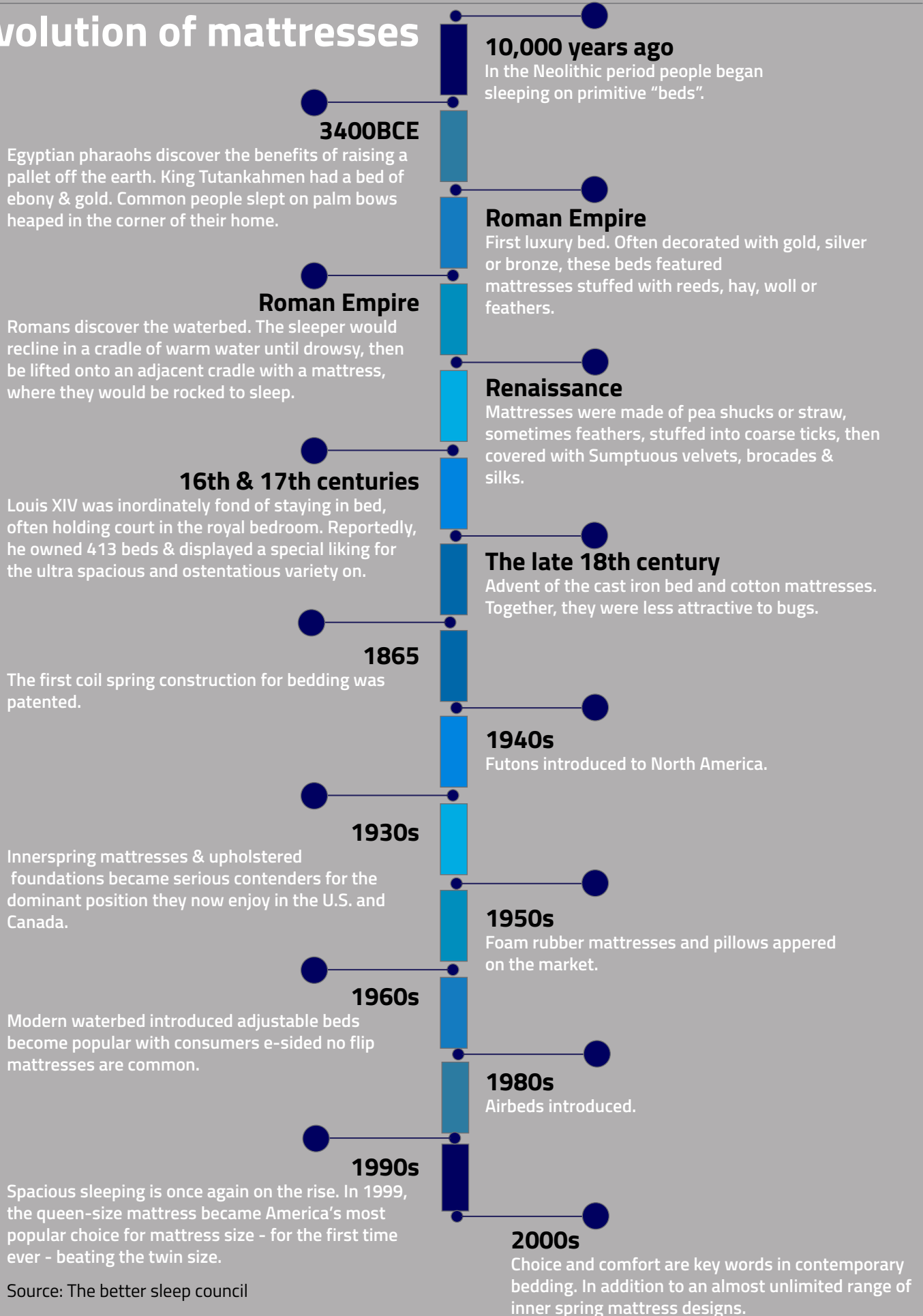
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# Evolution of mattresses



# A chronicle of mattress-making

**T**he modern mattress revolution dates back to 1915 in United States where the mattress industry united to put together some framework to work under and establish some standards in terms of sizes of mattresses, construction and quality. A new association came into existence to put up a united front. India took quite a while to organise itself.

## Olden Days

The history of mattress making is quite interesting. In India it was mostly the friendly mattress maker who would bring his rig on a bicycle with a gunny bag full of cotton and coir. He would untangle and re-fluff old cotton using his special machinery, stuff it into a full size cloth bag which would eventually turn into a bed. Stitch it and flatten the stuffing into a bed by beating the cotton filled bag with a heavy stick uniformly to make it into the shape of a bed. The bed maker would take two days to complete 3 to 4 beds, few pillows and he would halt at the same place until he finished his job. He would be usually accompanied by an apprentice, a helping hand to do odd errands.

The workflow of this duo would be astounding. First, the master bed maker would prepare the cotton both brought by him and the cotton from the old beds handed to him by the customer. He would then measure covering cloth and sew it up on three sides making into a bag. The prepared cotton would then be stuffed into the sewed bag. He would then sew up the remaining side to close the mattress. Then comes the most tedious task of beating the mattress to compress and flatten it into a uniform surface with a heavy stick.

The mattress industry has come a long way from those days. Now, there are sophisticated machinery to



**The mattress industry equipment were pioneered in Europe before reaching the shores of the US where it took a turn to scale production. By the time it reached Indian shores, the manufacturing machinery and the process had matured to a level where a modern unit would be more than 50 percent automated**

measure, cut and stitch clothes, to stuff the fillings and to compress the resulting mattress. The cover material and the inner fillings vary from cotton and coir to foam, springs and water! – yes, there are water mattresses which

are quite popular.

Modern mattress make use of a variety of techniques and specialized machinery. Most of the initial layering in a typical spring mattress used to be manual intensive labour. The spring box frame itself is manufactured using a compound machine which coils the springs, assembles them into neat columns.

Once the layers of cotton, latex or high density foam and quilt-like clothing are placed over the spring box, the mattress is closed off using a tape edge machine such as the FB5 Automatic. There are a number of sewing machines which are spealized to handle various types of mattresses. The edge tape machine is the most popular one used. There are variations of edge tape machines, like the newer ones can flip the bed on the other side for sewing up.

## New innovations

New innovations are always disrupting this industry. Simba is a new box type mattress making machine which compresses a bulky, fat mattress into a thin frame which can be folded and packed into a box so that moving it inside an urban home is quite easy. Once inside the bedroom, it can be pulled out of its packing to bring it back into its original fat frame. The Simba machinery is simply a press which compresses the manufactured mattress ready to ship. The spring mattress with all its layers of cotton and foam is compressed to few inches. That's its uniqueness.

A mattress factory typically will have a cloth measure and cutting section, a sewing section, a spring box making section, the layering section and a section where the quilted cloth cover is layered on top of the spring bed. The last is the edge taping section. Once done, a mattress goes through a packing and dispatching section. Most units will have quality checks at each level to avoid late identification of mistakes and wastage.

Most manufacturers are adding more and more automations in their workflow. **CT**



# Sleeping Over Competitive Advantage International Brands Enter India

India's Rs 10,000 crore mattress industry is witnessing a continuous challenge from foreign brands. The irony of this market is that as these foreign friends are making a beeline to a market which promises a huge slice the market is growing only at a rate of 8.2 percent.

That the Indian market is able to absorb both Indian brands and the foreign ones is a testimony to the size it offers. "It is not easy for an international brand to make foray into the Indian market," says Raghav Menon, CEO Mattress Division at Sobha.

International players soon discover that the game in the Indian market is more of managing real estate in terms of the retail stores than the sales of the sleeping products. One of the key strategies adopted by international markets is opening of sleeping experience stores which makes it difficult to penetrate in India since this requires significant investment in buying retail space. Indian real estate scenario is not the best, at least at the moment, to adopt this strategy, say experts.

There is indeed a silver lining in the dark clouds for international brands. E-Commerce is coming to their aid. With online convenience store and shopping hungry Indian consumers, many international brands hope to hit it big. Be it Casper or Amerisleep, the Indian consumer can easily reach out to the best brand out there.

Industry experts are quick to point out that international brands need to adopt a India centric game plan. India's market is mainly made up of the unorganised sector which accounts for 60 percent of the total market. The



international brands make up a mere 10 percent share.

"When the local brands have been finding it tough to break the grip of unorganised sector in the sleeping products industry, it is not easy for international brands to simply walk in and take over the market," says an industry expert.

Look at how long it took the big brands that entered India including KFC, McDonalds, Kellogs for instance. Food brands are similar to the sleeping product brands, both cater to personal needs of the consumer and both industries have significant presence of unorganised players.

All the brands mentioned earlier went through a long winded learning process understanding the Indian consumer, the culture and sub-culture which varies from region to region. Studies have found that culture is among the biggest

factors for brands to survive and thrive. The second, most important factor is the understanding of the value system of the society which informs how an individual or group reacts to a product.

As Matthew Eyring in an HBR article says, most companies struggle "not because they can't create viable offerings but because they get their business model wrong" (2011). Many international brands have tried to simply import their global offerings into Indian market and hoping to sell. Without establishing a firm foothold by investing in local manufacturing, localization of components or fine tuning their product offerings to suit every micro-market preferences, international brands do not stand a chance, says a report. Getting the business model right, identifying a fundamentally strong profit formula which is backed by a flexible operating model is what is necessary for international brands to thrive.



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The advantage the local brands have over the international brands is that most of these come as second nature. For instance, McD's had to adopt paneer tikka burgers after much thought while the local fast food joint has been thriving on this formula for decades.

Take for instance the case of Paper Boat, while the packaging was innovative and appealed to the upwardly-mobile, the beverage could not hit it big until it found its sweet spot — using local fruit juices and naming convention and sold during local events. Today, Paper Boat features in Navaratri festivals, local town and village gatherings and weddings. Same goes to the sleeping mattresses, identifying the cultural artefact that influences sleep will inform the right product attribute.

Some international brands such as the Emirates and Serta are indeed following this formula. With the opening up of the single branded retail chain for 100 percent FDI more action is expected in this segment.

Some international brands thriving in India

- ◆ Tempur
- ◆ Latexco
- ◆ Therapy mattress
- ◆ Casper
- ◆ Sleep number

- ◆ King Koil
- ◆ Sleepy cat
- ◆ Boston mattress
- ◆ Emerates sleep systems
- ◆ Emma

Indian brands have an edge over their international brands at home. There are several ways a local brand can respond to an international brand invasion. One, work on micro-markets that have specific product attributes. For instance,

**Contender:** Globalises supplies, deploys best international standards, makes qualitative difference to own products to match or surpass that of the new entrant; finally launches products in foreign markets as the best strategy of defence

**Defender:** Takes on the new entrant with product variants, better distribution or newer innovations

**Extender:** Uses home base success to launch in similar markets abroad through own distribution chains or through collaborations

**Dodger:** Looks for alternatives such as supplying to the larger brand or becoming a distribution partner

sports people require a mattress that can help their muscle relax and recoup while they sleep so that they are fit as fiddle for the next day's workout. What works best for them, foam, gel, or hyper elastic polymer.

Tweaking their distribution system and reaching out to the remotest part of the country with their sleeping products, offering the brand experience before a foreign brand invades is another opportunity. Or a little variation where tailoring a product that appeals to the cost conscious consumer.

As they say, sometimes offence is the best mode of defence. What if Indian brands take their brands abroad. There are several advantages that an Indian brand will immediately have. First, most western markets are well educated about branded mattresses, the unorganised sector is marginal to zero. Second, the cost of production gives it a cost advantage in foreign markets. Third, Made In India is respectable now thanks to Make In India. One does not have to sell India when it comes to sleeping products.

In a way, the advent of international brands is making Indian brands rethink their value propositions and competitive advantage. The question of what we can do when brands from outside come in or how can we make our base stronger and grow in the light of this new entrants are the questions one can hear in private conversation among business owners.

The answer to this is simple. Go back to the basics and identify your competitive advantage. Look at what Coca-Cola or Ikea did when they entered India. What lessons do they provide. The time to sit back and think that nobody can beat us in our backyard is gone. What is your strategy? Are you a contender, or a defender. Or are you an extender or dodger? Each of these defines how you will respond to the foreign brand's entry.

More international sleeping mattress brands will enter Indian market. This should be seen as a positive change by the Indian brands. **CT**





# India should sell SLEEP before mattress

India needs to sell “Sleep” rather than sell branded mattresses. The concept of sleep is not well appreciated in India. People spend their lifetime savings on reducing stress levels, increasing productivity, leading a healthy active life but give short shrift to sleep. So are Indians sleep deprived? A survey last year by Fitbit, the fitness wearable device maker, believes so. An average Indian sleeps for 6.55 hours every day as per a survey conducted by it in 2017.

“We need to sell sleep in India,” says Raghav Menon, CEO Mattress Division at Sobha Restoplus. “People should appreciate the concept of a good sleep and then visit a retail experience store to feel how a good sleeping mattress can help get good sleep,” says Raghav Menon.

## India market

India may be sleep deprived but the sleeping mattress industry is at an Rs 10,000 crore and growing at 8.2 percent CAGR for the past five years and continue the same run rate until 2021. Of this the unorganised sector

**Studies by Philips and Fitbit have shown that an average Indian sleeps only 6.5 hours a day way less than the prescribed 7 to 9 hours. Sleep deprivation increases chances of neurological diseases. Sleep deprivation is also linked to Type 2 Diabetes and heart ailments**

takes the lion’s share of 60 percent and the remaining going to the branded mattress. And unlike the western market, Indian mattress industry banks on the residential sector.

The potential is huge but thanks to the unorganised sector, it has not

demonstrated its promise so far. The typical Indian middle class consumer still buys traditional bedding from the local street-side gaddi-wala. It is the upwardly-mobile consumer in India’s tier one cities who has embraced the modern mattress. However, studies show, that this sector has a long way to go in adopting the mattress.

Unlike in the US, in India, the mattress industry hasn’t taken any concerted effort to push mattress consumption. Remember that between 1960 and 1985, US industry ran an aggressive campaign promoting changing mattresses every four years once. Like the campaign for peanut products and apple, this campaign proved extremely effective. “It’s too expensive to do a concerted campaign in India but we are taking a lot of initiatives,” says Raghav Menon.

Will this change? Well, the Indian mattress industry is now coming together to lead the charge. They are putting up an united front to drive awareness among Indian consumer about the virtues of branded mattress. “We are doing a lot

to increase awareness about quality, standards and importance of buying from branded vendors, says Raghav Menon. This is just the beginning, we want Indian consumers to be aware that they need to sleep well and in style.

It is said that a typical working Indian householder will spend close to one-thirds of his time at home sleeping does not care enough about getting a good mattress. That could be changing slowly but not fast enough. India is witnessing a revolution in sleeping industry. The Sunday brand in Bengaluru offers custom made mattresses online. However, the target audience is, not widespread and restricted to those who care about how they sleep. But it seems that we need to sell sleep all over again in India. Its *ok* to sleep for 8 hours. It's good to buy a good mattress to sleep well.

Much of it is cultural. According to a study 67 percent of respondents said they did not get enough sleep daily. Interestingly though, 49 percent of these respondents said they were guilty of not exercising regularly and 42 percent said they were guilty of not eating well while only 29 percent said they guilty of not getting adequate sleep. So the guilt for not exercising and eating right overrides the guilt for not getting enough sleep. In most Indian cultures, sleep is not given the right prominence.

## SLEEP PRODUCTS

The sleep products industry as a whole has woken up to the sleeping giant of a market that is India. There are a number of devices, products and services which are trying to woo the consumer. Starting from the hospitality industry which is taking sleep seriously thanks to the heightened competitiveness in the market, there are specialized Sleep Spas or new sleep resorts are springing up which offer an undisturbed, relaxed environment amidst mother nature and free of electronic gadgets. There's more as we will see.

Hotel industry is on a war to put its guest to sleep. Their feedback form usually features questions like, "Did you have a sound sleep?" or "What can we do to make your sleep better!". They are

## The age old tip of "Count Sheep" is passe. There is a huge industry that is running behind the sleep-deprived Indian consumer

### An industry to put you to sleep

#### Hospitality Industry

- Sleep menus
- Special pillows
- Aromatherapy

#### FMCG Industry

- Anti-snoring products
- Lighting solutions
- Sleeping aid products

#### Healthcare and Hospital Industry

- Sleep clinics
- Sleep labs
- Special sleep therapies
- Polysomnogram checks

#### Pharma Industry

- Creams and oils
- Sleep medicines including sedatives Anti-snoring products
- Nasal Spray
- ENT medicines

#### Publishing Industry

This industry has just discovered that sleep related reading materials and videos are in great demand

redesigning their rooms, cutting ambient noise during night, remaking the bed, offering a choice of pillows and setting the room to an optimum temperature. A traveller who is already in a strange place will find it difficult to sleep and hotels are racing ahead to offer the best, homely feel to their rooms.

### Indian consumer

How can Indian consumer scale the wall and move towards better quality

sleep and better quality mattress. For starters, consumer education needs to be increased. For instance, globally spring mattresses are a rage but in India it is in its nascent stage. In India still coir, cotton, and foam rules. Spring mattresses and memory foam are just picking up.

Consumer goods industry is pressing the gas pedal to the sleep world. Lighting companies are ensuring that blue light is cut off during night, which is believed to be harmful to eyes, is cut off during night. Mobile phone apps are abundantly available offering a filter to cut off blue light. Lighting companies are also vending special fixtures which dim out the lights to set the mood to sleep. Earlier if the bedroom was the focus, now it is the living room. Pharma companies are launching night creams, body oils and sedatives to help people sleep. Nasal sprays, anti-asthma inhalers, anti-snoring products and many more are making a beeline to the neighbourhood stores to ensure the Indian consumer sleeps well. There are oil massage therapy and aromatherapy offerings which are taking over households.

To make an Indian sleep, we have to sell its virtues. We have to show her the classical FAB (Features, Advantages and Benefits) of sleep. Her child will grow up wiser and more successful; or her child will ace the exam by sleeping soundly days before the exams; or her child will bring home laurels in the athletics meet by sleeping well. Same goes to adults. Can we have an adage, "Eat well and sleep well", and popularise it. Can we demonstrate how creative individuals sleep more. Can we dig into our history and mythology and show how sleep was more prominent than it is in the modern times. More than anything else, can we show to a growing adult how sleep can save him medical expenditure after 40s so that he can buy his dream car or dream home or go on that dream vacation.

But it seems that we need to sell sleep all over again in India. Its *ok* to sleep for 8 hours. Its good to buy a good mattress to sleep well. **CT**



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# Mattresses in the US market

## Which way are they rolling?

The industry will see revenues on a slow and steady surge, but it cannot ignore old challenges and new challengers now

**T**he US market is an interesting beacon for other geographies to watch; and mattress or furniture industry is no exception here. The market serves so many lessons, patterns and trails that play out in similar ways for other markets across the globe - sooner or later. There is a reason that people still believe that if the US sneezes, the whole world will eventually get a cold.

So it would be pertinent to have a peek at what this market is insinuating about the growth, drivers and challenges that are going to accost the sleep and wellness industry ahead.

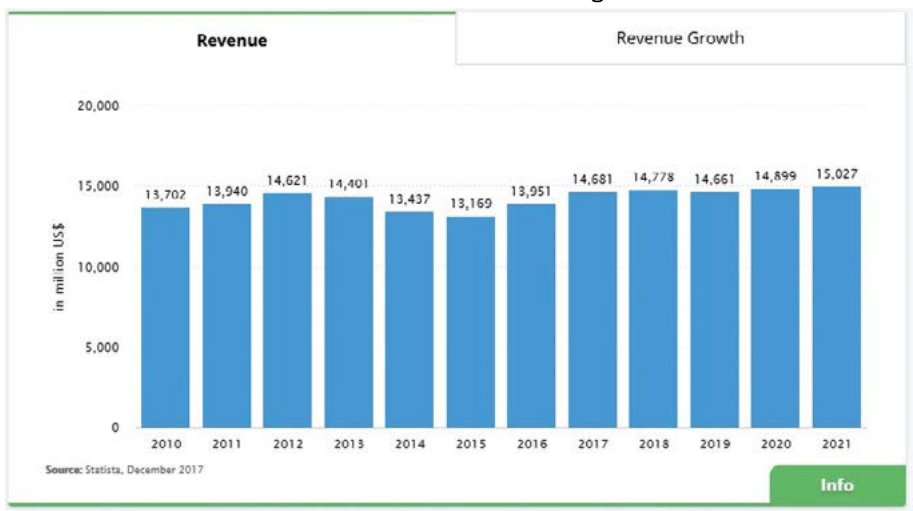
### Numbers!

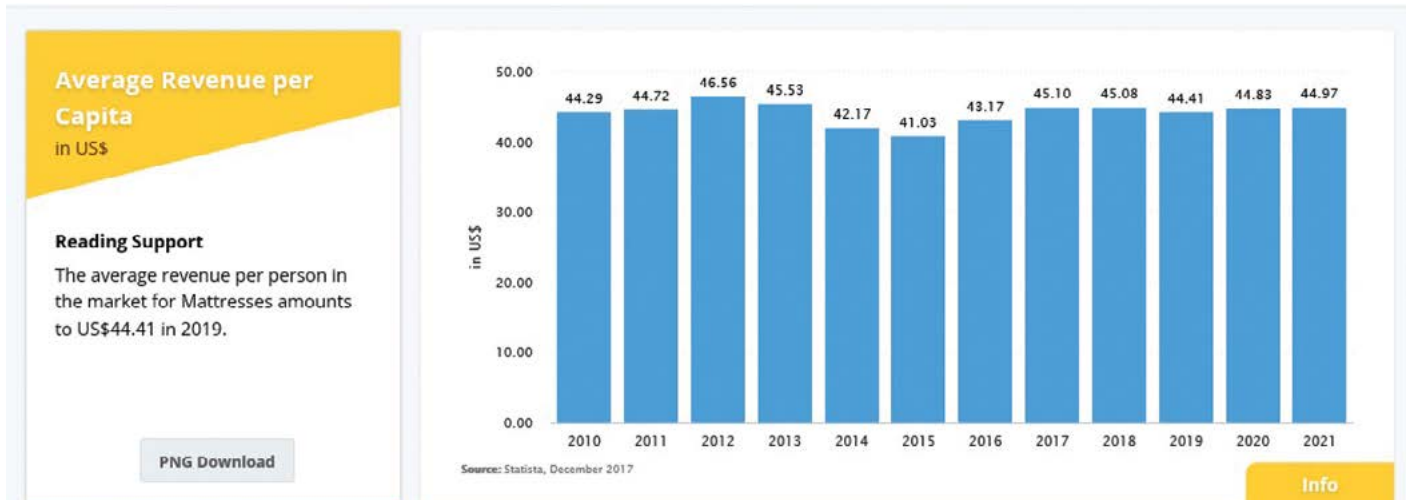
First things first, revenues. Yes, they

are moving northwards. But if we comb through data that Mattresses segment in the United States shows as per a Statista Market Forecast, we will notice that revenue in the Mattresses segment touches \$14,661million in 2019. This is considerably higher than the point of \$13,702 million that 2010 closed with. A notable jump happened in 2012 when the industry crossed the \$14,000 million mark. But in 2014 again the tide shifted to sub \$13,000 million level again. It was only in 2017 that the threshold was passed and the growth has continued from there on in the \$14,000 million bracket. What's encouraging is that the market is augured to touch even better levels – like \$14,889 million in 2020 and then surpass the \$15,000 million level in 2021. The market is expected to grow annually by 1.2 percent (CAGR 2019-2021). What would be helpful to dig here now is some knowledge of the sub-segments that would drive this growth. Industry players need to pull up their act on how best to leverage this growth trajectory and maintain the new levels of revenues that the industry is gaining.

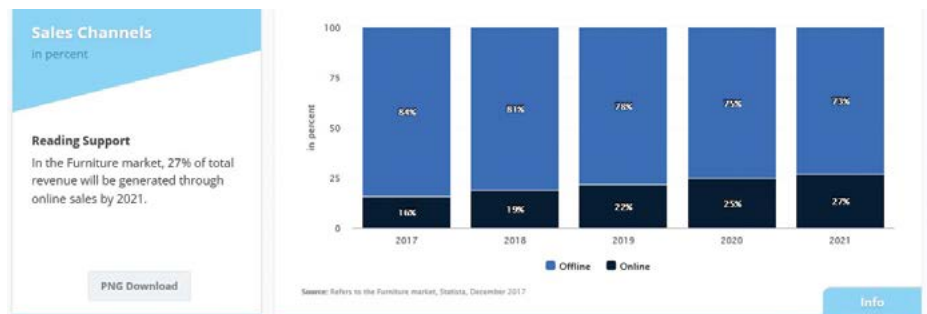
### Slice the Apple

Geographies, product categories and markets change the plot a lot when revenues are sliced into various specific perspectives. For instance, it is worth noting here that in global comparison tables, most revenue is spotted to be





generated in the US (\$14,661m in 2019) region. If we look at these numbers in relation to total population figures, we would not be able to miss another interesting detail. The per person revenue indicated for 2019 is around \$44.41. The industry may be on a growth curve but there is a dire need to amplify per capita consumption in this market.



Sleep and wellness need to be accelerated as priorities and as major lifestyle choices among today's customers. What is both intriguing and challenging, hence, is the realization that players in this market are not only fighting each other for more share of wallet and share of mindspace but also fighting millennial-age choices from other products and lifestyle priorities. Buying a mattress is not perched exactly close to buying a smart-phone or booking a holiday even now, as one may surmise. That's where industry players need to wield an aggressive marketing strategy hinged on information and awareness. This is the right time to wean away customers from other categories; and make sleep and wellness items that are in the top league of their habits and purchase-decisions. Sleep or wellness as a product has to come out of the shadows of customer oblivion and complacency. It cannot be sitting on the fringes of consumerism anymore.

**New rivals arrive**

The mattress industry may have not seen the online onslaught coming but it is high time it notices the blitzkrieg. In fact, in the furniture market alone,

**10 Best Mattresses of 2019 in USA**

- ◆ Nectar
- ◆ Saatva
- ◆ Tomorrow Sleep
- ◆ Loom & Leaf
- ◆ Tempur-Pedic
- ◆ Puffy
- ◆ Leesa
- ◆ Nuvanna
- ◆ WonderPedic
- ◆ Eight

27 percent of total revenue is slated to be generated through online sales by 2021. In 2017, online sale accounted for 16 percent of the market while offline segment stood at a strong 84 percent. Come 2018, and we saw, the foothold for online segment getting slightly stronger at 19 percent as offline market inched back to 81 percent.

It is being predicted now that the pattern would persist and gain momentum. The year 2019 alone can witness a growth in online market from 19 - 22 percent, leaving a 78 percent share for offline players. The dynamics would only tilt in favour of online players as the next year sees online market hitting it bigger with 25 percent and then at 27 percent by 2021. Remarkably enough,

offline space would have dwindled to 73 percent of market share by then if these predictions pan out as per the pattern witnessed so far.

The thing to take home after chewing all these numbers is not anxiety but strategy. May be this new-fangled competition is good news in disguise, both for the legacy players that have reigned the market for decades and for the industry as a whole.

The innovation and models that the online counterparts introduce in the market can be welcome shifts that help the industry on a broader scale. It is also going to help if customer interest and awareness for sleep products is rejuvenated by this influx of, and the new marketing arsenal of, these tech-savvy players.

Overall, the industry is on the verge of turning a new chapter in every way – whether it is the potential that lurks around the corner to the competition that has been sitting on the bench for some time now. It's not the time to sleep. But time to smell the coffee. **CT**

**S. SUNDARESAN**



Rahul Gautam, CMD, Sheela Foam Ltd

# Time to size-up and standardise

While we have gone up several notches on product display, customer experience and infrastructure; availability, certain government policies and standardization continue as challenges that still need to be navigated. In this interview, **Rahul Gautam**, *CMD, Sheela Foam Ltd.* unravels what are the good turns as well as some tough roads that the industry has been up to.

**Q** What would you pick as highlights for the Sleep Industry, as observed in the past two to three years?

A major one is, of course, the implementation and then reduction in the rates of GST. Today, it has been harmonised at the median level of 18 percent. We have also seen increasing and getting better at advertisement of products which have accelerated the goal of improving awareness.

Another commendable development is the better state of display of products that augments customer experience in a fresh and strong way.

**Q** How serious is the impact of e-tail here?

I ascertain it to be a little at the moment. It may have a fair share of around 10 percent in a few years.

**Q** Any areas where Government-Policy changes can help the industry?

A major change is about the restrictions on the use of cotton as that is a commodity with applications in other valuable products.

What is also significant is the area of

recognition of the importance of a good mattress even in the lowest segment.

**Q** How crucial has been the role of technology in this industry?

Technology has certainly penetrated every aspect of the business and will continue to do so both in terms of width and depth. This is visible in the impact made on automation, faster distribution, improved experience and better durability.

**Q** If you were to augur any major shifts for the next two years, what do you see transpiring next?

I hope all of the above strides continue for the industry's evolution and with that we need to work on increased value-additions for the products. The industry should also witness an increased reach with help from better infrastructure.

**Q** Any challenges that remain for the industry and need adequate attention?

I opine that availability of products to all nook & corner of the market should be aimed at. We also need to work on standardisation of sizes. This will cascade into easing mass production for both consistency in quality and for reducing costs.!





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# TRAVELLING

## The sleep friendly way

Who could have thought that 'Sleep' would become a key proposition for the hospitality and travel industry too? Hotels and travel players are not just letting you check-in for better, and faster, travel but helping you check-out of a long day as well. And they are making it as cozy as they can

**“W**hether that mattress was stuffed with corn-cobs or broken crockery, there is no telling, but I rolled about a good deal, and could not sleep for a long time. At last, I slid off into a light doze, and had pretty nearly made a good offing towards the land of Nod, when I heard a heavy footfall in the passage, and saw a glimmer of light come into the room from under the door.”

Herman Melville’s words capture the essence of travel from the days we have left far-far behind. Ah, the times when inns were havens of relief for weather-worn and exhausted travelers. Inns were the places where hooves and feet of all kind got a warm loaf of bread, a soothing mug of milk and a fuzzy bed to vanish into. The inn-keepers made sure that tired travelers got a good night’s rest before they resumed their long journeys the next morning. And that was it.

But with time, and evolution of man’s laziness and technology, travelers

demanding and hospitality-providers supplied more amenities. Luxuries became selling points. Chandeliers and valets, old wines and new pianos, carpeted floors and plush pools became the hallmarks of a good hotel. And soon for airlines, trains and coaches too.

Funnily enough, the pattern continues. Human civilization jogged at such a fast pace that today sleep has become a luxury, and hence, the perfect feature (again) for a good hotel or travel vehicle.

As the idea of a good, relaxed and rejuvenating sleep becomes elusive, hotels and travel players are attempting to introduce that indulgence into their menu-cards too. The Spouter Inn is back.

### Sailors and Horsemen – Get ready to sleep

Let us look at some numbers that seem desultory at first. But have patience.

Ponder over the U.S. sleep market that was pegged at about \$28.6 billion



in 2017 and forecasted to dart ahead at a 4.7 percent average annual growth to 2023, as per a report from Marketdata LLC.

Now turn to the global sleep aids market, which, as calculated by BCC Research, is supposed to touch as much as \$76.7 billion in 2019.

Where do you think this market is going to derive its fuel from? The consumer segment alone cannot be adequate for the vast numbers the future beholds. A lot of the potential for those smart pillows, for those aroma-brimmed rooms, for those sharp clocks, for those intelligent sleeping-apps, and for those sleep stores/labs is blanketed inside industries like hospitality and aviation.

Creating sleep-friendly experiences for travelers is now a major goal for many future-forward hotels. At Westin, for instance, you are likely to find a 'Sleep Well Menu' that is made possible with a well-curated list of sleep-enhancing super-foods. In New York, the WestHouse has started offering mattresses with special support, along with sleep-masks and aromatherapy-oils. In Las Vegas, names like MGM Grand are using ambience to its ultimate rescue for sleep. The Four Seasons introduced a customizable bed. Some hotels have installed dawn-simulator alarm-clocks that make the ambience light up gradually, like a sunrise and they also have blackout-shades. If that is not enough, and you are unable to fall asleep, you can also order a sleep concierge, to answer any sleep-related questions at The Benjamin New York. We even heard that the hotel had promised to refund the guests if they were not happy with the sleep they got here. What else can you 'dream' of with a hotel-stay?

Chains like Marriott and Hyatt have started experimenting with technology for that perfect sleep time. They are investing in Internet of Things (IoT) so that they can give truly-connected hotel rooms where offerings like smart lighting, personalised/intuitive/adjustable smart beds and other accessories are made possible with the power of insights and



## Features of a sleep-conducive hotel room

1. Hard surfaces like walls and desk-top areas as displays, speakers and work surfaces to be used for relaxation and sleep-preparation
2. Soft surfaces like fabrics, room furnishings, pillows for tactile interactions, production of sleep-pro scents, colour-changes, textures and skin-signals that help with good sleep
3. Atmospheric temperature-control, sound buffets and air-conditioning for room-climate alteration and ambience-simulation/stimulation (forests, mountains, seaside – whatever brings sleep faster for a guest)
4. Choices of lullabies from music-libraries
5. Spritz on sheets that align with a guest's preferences – said and unsaid
6. Super-imposition of computer-generated data on the room for creating home-like environments for guests who are miles away from their homes
7. Digital creatures, plants or characters ordered from virtual environments, movies and games as roommates
8. Pink-noise amplification
9. Cute, and cuddly, teddies to wake up guests – made possible with robotics

*(Courtesy: A report by Dr. Ian Pearson for Travelodge and other Industry observations by Sleep.org)*

connectedness. In Virginia, Lorien Hotel & Spa has begun giving dream buttons on the phones. Guests smell grapefruit or other complimentary, relaxing scents the minute they wish to. And order milk and cookies too.

Sleep programs, like the ones brought out by Six Senses Spas, have given the industry concepts like sleep ambassadors and sleep curation already. Hotels are conducting tests and swinging by factories to invest in the

best beds for their guests.

At a recent Sleep Set design challenge, we saw new feats and leaps in this space. HBA London tried to take guests almost completely into another world by awakening the curious explorer in everyone to walk into unexpected surroundings. There was designer Yasmine Mahmoudieh too who created a narrative based on different Penguin Books so much so that each area within the room set brought themes from the



books to life.

The most unusual and spot-on is the offering of pure-sleep-oriented stays for on-the-go travelers who are looking for room-availability for short-term and cheaper stays so that they can just refuel their sleep and move on.

As Dr. Ian Pearson unveiled in a special report on the travel industry's future, 'when we need to stay in hotels in 2035, we will still want a good night's sleep in comfortable surroundings. The key difference is that our experience will be personalised to our individual needs and taste via virtually invisible technology.'

These predictions have their roots in some hard-to-refute arguments. The increasingly-tired society, where every year we need the same amount of sleep and every year we get less of it, has shown why in 2035, sleep will still occupy a third of our lives. Do not count on technology to change our basic need to sleep, Dr. Pearson warned. But he did hint that – 'the way in which we satisfy our appetite for slumber will change markedly.' He also noted how it is often harder to sleep when away from home. That led to why and where the 2035 hotel-room could improve sleep quality by emulating the home-environment.

The chase of good sleep would be conducted with everything possible in a room – from the surface, the wall paint,

## What hotels need to augment

1. **Better noise control:** As many as 52.5 percent respondents said they were irked by noises from the street
2. **Better mattresses:** 48.3 percent of survey respondents complained about bad mattresses at hotels
3. **Bad pillows:** Uncomfortable pillows were picked by 38 percent of respondents
4. **Stained sheets:** 31 percent of respondents
5. **Room temperature issues:** 30 percent of respondents
6. **Poor duvet-quality:** Nine percent of respondents
7. **Lack of enough pillows:** Ten percent of respondents

*(Source: Mattress Advisor's survey of nearly 1,000 Americans on social media in 2018 for knowing more about bed comfort in various hotels throughout the country)*

the fabric in the room, the smell inside, the speakers and clocks around to the sights that envelope a guest. Anything that can be used for sleep-enhancement is being used or will come into play soon. The mattress is becoming adaptive and the room-scent is becoming optimized for a guest's sleep as we speak.

This would also entail monitoring

guests, albeit in a non-intrusive way. As a corollary to helping good sleep, anything that can interrupt good sleep would be relentlessly kept away. So, do-not-disturb facilities, anti-noise and ambient audio are kicking in.

But do not be surprised if you find a hotel promising dream-management too. After all, we are living in the age of Pokemon so combining augmented reality (AR), neuroscience and sleep cycles can deliver miraculous sleep-experiences any day now. There is a strong chance that orchestrated dreams – powered with virtual reality (VR) tools, video, audio, smells, and tactile experiences – can be fresh and chief features of a hotel.

Consider what Dr. Pearson observed – 'Dream linking to other people will be possible – so if a friend is dreaming at the same time, it may be possible to communicate with them via your dream. Sleepers will also be able to play games in their sleep using feedback from image recognition and emotion detection.'

In fact, hotels could go a step further. Nightmare-management. They can assure you that while you are parked in their beds, the use of skin-conductivity tools plus sensors armed with smart alarms and intelligent monitoring systems can ensure that nightmares become the headache of the hotel, and not yours.



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In a survey, 40 percent said hotels knew how to keep the sunlight out.

*(MattressAdvisor)*

Some hotels can even take it upon themselves to teach you a new language or skill while you sleep there. Sleep learning at its real peak!

No wonder then, that sleep is becoming a significant factor in assessing one's hotel experience. As seen in a survey done by Mattress Advisor covering top 25 hotels for sleep quality in America, a number of obstacles came up when guests thought through their experiences.

As many as 81 percent of travelers pointed at the importance of a comfortable bed as the 'single-most important' feature in a hotel room. When asked to compare hotel sleep with the sleep they experienced in their own bedroom, a lot of respondents did rank hotels for better sleep experiences. Ex: When it comes to comfortable sheets or bedding, 47.7 percent of respondents prefer their own home, but 33.5 percent find them better in a hotel.

### The skyline beckons

Airlines have started realizing that sleep is a major part of travel experience. After all, jet lag is more than an excuse to not resume work or the very next day after a long-haul trip.

Chances are you have spotted sleeping pods at Airports like the ones in Dubai and Amsterdam or even at cargo areas of Airbus?

In fact, pure-sleep-oriented mini-hotels are coming up. Sleepbox is rolling its tiny rooms at various airports. Travellers can rent 30 to 40 square feet rooms at airports now – where sleeping in a box is all they want during a late or cancelled flight, instead of a proper room.

If handshakes like the one between American and Casper or between United Airlines and Saks Fifth Avenue are anything to go by, we would be soon assessing flight choices based on



complimentary sleeping-products. Apps that allow users to get a grip on one's sleep clock via circadian neuroscience are also dotting the market with a new-found excitement and attention now. Sleep is going to be a new concept altogether when we travel towards the next decade.

### A Good Night is Arriving

Looks like today's and tomorrow's hotels and travel players are leaving no effort spared to tuck a guest into warm sleep. The only thing left now is, perhaps, a possibility of 'cattle' in

these sleep-menus. For counting sheep, if you may.

As Melville augured well in *Moby Dick*. "But here is an artist. He desires to paint you the dreamiest, shadiest, quietest, most enchanting bit of romantic landscape in all the valley of the Saco. What is the chief element he employs? There stand his trees, each with a hollow trunk, as if a hermit and a crucifix were within, and here sleeps his meadow, and there sleep his cattle, and up from yonder cottage goes a sleepy smoke." **CT**





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What you eat, how you eat, when you eat, what you watch, what you sip, what you think and when you sleep - there are so many hidden ways in which your sleep gets either aided or interfered with



# Habits that help or hinder sleep

**D**o not sip caffeine before bed-time. Do not dip into blue light. Do not eat this. Do eat that. We all have grown up listening to advice on sleep from all corners. But it's always good to catch up on what's the latest word out there.

Specially when sleep-disorders are almost shaping into an epidemic.

## Not sleeping enough is serious, very serious

If you feel good about being able to pull through a hectic week without those grandma-and-doctor-prescribed eight hours of sleep, then you should hear what scientists and sleep-investigators are finding in their hunts.

A recent study (by Qiao He and her team from China Medical University) has linked the risk of heart-attacks and strokes to insomnia. Any difficulty in initiating sleep, difficulty maintaining sleep, or non-restorative sleep have been observed to be connected to 27 percent, 11 percent, and 18 percent higher risks of cardiovascular and stroke events, respectively.

To this list, you can safely add other risk-propensities like effects on metabolism, blood pressure changes, Alzheimer's, type-2 diabetes, obesity, depression and jumps in sympathetic activation too. Researchers at the University of California-Berkeley have also uncovered a link between age and ability to get truly-restful sleep.

Dr Dieter Riemann, the founder of the European Insomnia Network, has rightfully argued that with a rise in working-everywhere jobs, home offices as well as email making their way inside homes and beds, the culture of 24/7 availability – we are having more strain in daily lives than we ever had. He contends well, “It’s much harder to relax, to wind down, to shut out disturbing thoughts and having a lot on your mind can interfere with how well you sleep.”

So what can you do to make sure you sleep well and without distractions, interruptions and sleep-party-poopers – both visible and invisible ones? Turns out, you can do a lot more than just keeping away from a late-night coffee or beer.

The answers lie in everything from psychiatric or medical conditions, unhealthy sleep-habits, to specific substances, habits and rhythms. And some me-time. One that is truly ‘me’.

### Sleep-divorces

It is not just a new fad. People are actually trying the idea of sleeping with separate blankets, in separate beds or even in different rooms so that the suffering of sleeping with someone who snores, kicks, sleeps late or prefers a different AC-tuning – all that can be solved amiably.

In a study of 2,000 American adults, Slumber Cloud found that half of the respondents had partners who snored too loud, and a third of them were found fighting for covers. In fact, one in five men used to wake up with their partner’s hair in their face. Half of the respondents preferred to sleep alone than sleep in the same bed as their partners.

That explains why walking away with your own pillow and sheet is not a fight-scene anymore but quite the opposite of that.

### Sleep timings

Sleeping late, per se, may be a choice but the way it affects one’s diet and habits leads back to the age old adage – Early to bed and early to rise. Some

researchers have uncovered how an increased risk of ill health in people who are night owls plays out due to erratic eating patterns and consumption of more unhealthy foods.

In the study led by Dr Suzana Almoosawi from Northumbria University, the UK and Dr Leonidas Karagounis, Nestle Health Science in Switzerland, it was seen that people with the evening chronotype, i.e. the ones with a natural preference for evenings, consistently reported more erratic eating-patterns, breakfast-skips, more caffeinated drinks, sugar intake and late-meals.

Plus, having regular sleep patterns helps with a good night’s sleep by getting rid of body’s work for adjustments. So add some rules and rituals that bring regularity and sleepiness to your bed.

### Fruit-fly Effect:

Fruit flies are like humans - active during the day, sleeping at night and display similar sleep characteristics. So a study went ahead and discovered a new gene *Eaat2*, plus a mechanism that modulates sleep by controlling the movement of taurine. Because taurine gets elevated in blood and urine of sleep-deprived people. Researchers at Florida Atlantic University and McGill University in Quebec have discovered a new mechanism for regulating sleep based on how movement of taurine to and from glial cells might influence sleep in humans.



Also, make sure that you are sleepy. Because being exhausted does not mean you will not end up counting sheep. That means too much activity (screen-time, binge-TV, mental work) just before sleep hampers the body’s time to transition to an ideal sleep-state. One should also limit afternoon-naps and abnormal sleep-patterns through the day.

### Glass Half Full

Question – Does a glass of that tipsy drink help you sleep well or does the contrary?

The answer has often been tilted to the side of helping sleep but researchers from the University of Missouri (MU) School of Medicine in Columbia, MO, tried to swirl the relationship between alcohol consumption and sleep further. The prevailing view held that alcohol can aid sleep by affecting a person’s sleep homeostasis (our brain’s built-in mechanism for regulation of sleepiness and wakefulness and it is where our body uses a chemical called adenosine). The study explored the equation between these chemicals and alcohol, specially how fluctuations in adenosine can help to induce sleep but that sleep is often brittle and low-quality.

Dr. Pradeep Sahota, chair of MU School of Medicine’s Department of Neurology, concluded that ‘alcohol should not be used as a sleep aid’ because of the question of quality of sleep. It can help to sleep for temporary relief but one may end up waking earlier than one ought to – because of the homeostasis factor and the diuretic characteristic of alcohol.

### Social and Optical jet lag

Yes, those are proper problems. What we call as ‘Social jet lag’ is actually a syndrome related to the mismatch between the body’s internal clock and the realities of our daily schedules. Look at what Michael Rust of The University of Chicago found - that humans in modern societies, at least people who used Twitter in 2013-2014, manifested biological rhythms which were somewhat disconnected from the changing hours of sunlight throughout the year.





## Do not NOT SLEEP and Drive

While this may not be a surprise that excessive sleepiness can cause cognitive impairments and increase the risk of motor vehicle crash, what a study has found is that sleep-deprived individuals may be unaware of their degree of impairment from sleep deficiency.

*(Source: A team of researchers from Brigham and Women's Hospital)*

To add to that, there is the jet lag that hits our eyes. Researchers have come out with proper clues on how certain cells in the eye process ambient light and how that helps the body to reset our internal clocks (the circadian rhythm - as we know it better). Now if these cells are exposed to artificial light late into the night, this confuses and messes with our internal clocks - as per what some Salk Institute researchers peeled off in their study.

Other investigations have echoed such results on increasing nighttime levels of artificial, outdoor light exposure, and how it is linked to an increased prevalence of hypnotic prescriptions and daily dose intake. (Observed by Kyoung-bok Min, PhD, an associate professor in the Department of Occupational and Environmental Medicine at Seoul National University College of Medicine).

So, turn off that phone or laptop before you turn in.

### Sleep & Celsius

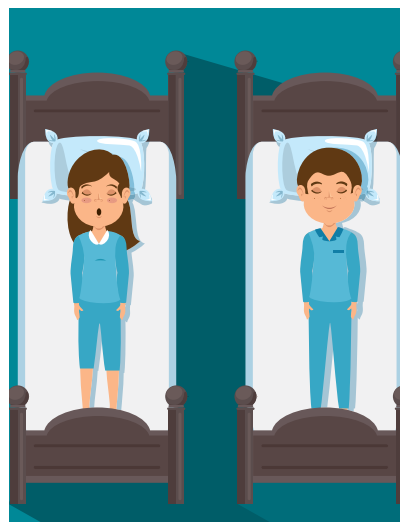
There is a reason that human bodies, in general, sleep easily in colder temperature. The body temperature

naturally cools as it enters the sleep cycle. Any temperature that is high can act as a disruption in this process. Do not take temperature for granted and learn to find your body's favourite zone of sleep.

### What else?

According to the American Academy of

The National Sleep Foundation recommends that adults make sure to sleep between 7-9 hours



Sleep Medicine, environmental factors, like excessive noise or light and extreme temperatures can disrupt the sleep of most individuals. Let go of artificial aids too. Do not take that sleeping pill as a knee-jerk answer to sleep issues: The American College of Physicians note that they sedate the brain, instead of helping it sleep naturally.

Change that old and gnarly mattress and invest in something that will help you escape that back-pain or sleepless night. Noise, midnight snacks and the ego-boost of feeling productive or proud for not sleeping enough - get rid of them today. Sleep matters.

Whatever you do, remember Matthew Walker, a UC Berkeley professor of psychology and neuroscience, when he warns - "Don't be fooled into thinking sedation is real sleep. It's not."

Just watch for what helps you sleep and what doesn't, and what simply sedates you.

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# India shines at PUTECH 2017

The conclave is over but the pats, claps, and sighs of surprise are not. At the biggest parley of this industry in South Asia, India stole the admiration and curiosity of a lot of delegates, industry players, visitors and exhibitors. The mega Polyurethane event PUTECH 2017 etched Indian players as a force to reckon with. This year the event that was held in Noida saw an impressive surge of both exhibitors and innovations. In comparison to the last PUTECH huddle that happened in 2004, this year saw a marked jump of 40 percent in terms of the exhibiting companies.

The summit was a culmination of efforts and ideas of the Indian Polyurethane Association (IPUA) and manifested as its fifth exhibition conference. What cemented the impact and impression that India made, as it rubbed shoulders with the world's top players and their product repertoires, was a relentless focus on innovation that not just meets, but exceeds, customer expectations. All the products that were showcased were reflective of technological progress and alignment with new business opportunities that keep the customer context on the top of all attention-ladders.

## Handshakes and Voices

In addition to the new strides that the polymer industry is embarking upon, the event also entailed other new directions being taken in the form of the association's initiatives like the India Insulation Forum, Indian Sleep Products Federation and Virtual Technical Centre.

Noted honchos from other parts of the world like Steen Weien Hansen, VP, PU Huntsman Europe and India, joined this conference and augmented it with their unique perspectives and outlooks.

While Chief Guest R C Bhargava, Chairman, Maruti Suzuki, reminded the industry about the spurt in potential and the emphasis on regulatory compliance, the Pavilion offered an opportunity for



discussion of training initiatives under the Virtual Technical Centre. Attendees and other players appreciated the event for its remarkable aisle space, infrastructure, an international feel, extra-ordinary quality, and of course, the equipment-orders they picked up right at the event. The launch of an 'All India Market Survey on the PU Industry' was specially admired for the insights and assessments it equipped the industry with. So were the special conferences organised by ISPF and Dow Chemical that entailed technical presentations and enriching discussions on processes, sustainability and future trends.

It was interesting to note the progress that is made by parallel industries like the sleep and wellness sector. Combing through data that Mattresses segment in the United States showed as per a Statista Market Forecast, gave an observation that revenue in the Mattresses segment is touching \$14,661million in 2019. What's encouraging is that the market is augured to touch even better levels – like \$14,889 million in 2020 and then surpass the \$15,000 million level in 2021. The market is expected to grow annually by 1.2 percent (CAGR 2019-2021).

Such discussions and analysis-moments also served to present some challenges. The per person revenue indicated for 2019 is around \$44.41. The industry may be on a growth curve but there is a dire need to amplify per capita consumption in this market. To add to that the threat emanating from alternative channels is becoming paramount. In the



furniture market alone, 27 percent of total revenue is slated to be generated through online sales by 2021. Hence, the role of industries that underpin production, and equip the value chain of mattress products, becomes significant and refreshed in the next few years. Like Polymers.

## Welding the Future – Now

The event also made room for some awards that celebrated notable impact made by some players in the areas of innovation, safety, services etc. Apart from the gleanings that the industry took back on where innovation is heading, the event also endowed its visitors a strong chance to network, exchange ideas and iron out common industry challenges. The event allowed people not just to exchange cards but also to exchange ideas, doubts, future plans, strategic possibilities and innovative leaps. It was a forum where the industry took a breather from the everyday fire-fighting and immersed itself in the quality time of thinking about the future and incubating thoughts that they can take back for real transformation and progress ahead.

As IPUA Chairman Dr. Mahesh Gopalamudram observed during his inaugural address, "From rigid to flexible, from solid to cellular, from paint coat to adhesive, from plastic to elastomer, from film to fibre, from thermoplastic to thermosetting, polyurethane covers it all. No other single polymer has such versatility."

It was a polymer – wrapping all the materials and elasticity of a good conference. **CT**



# Interesting Trivia about Sleep and the Sleep Industry

## The Water-Bed maker

It was an industrial design student Charles Hall that gave the world the idea of a waterbed. He submitted a waterbed prototype in the form of his senior thesis, H<sub>2</sub>O-infused mattresses. The waterbed was his graduate design and engineering school project for his Master's degree. He even applied and received a patent for it. Today, it is reincarnated as "not your parents' waterbed." His other innovations include Sun Shower, a portable warm-water shower, and the Equalizer mattress for waterbed like comfort to campers.



## Mattress has to observe fire regulations

Mattresses can be big reasons for starting and aggravating fires inside houses. A mattress has to observe fire regulations in many countries and under some specific laws. An old mattress can go up in flames faster than a new one. This can be hazardous when Fire expert-estimates allow a person hardly two

minutes to escape a house fire. The industry has often been instructed to use high-grade fire retardants in their products and despite regulations; criticisms have been high on lack of enough attention to this area. Can your mattress tackle a 2-foot wide blowtorch flame for 70 seconds?



## Disasters due to lack of sleep

Can you believe that sleep-deprivation can cause a historical disaster? As per some chronicles, the 1979 nuclear accident at Three Mile Island, the notorious Exxon Valdez oil spill, and even the 1986 nuclear meltdown at Chernobyl were connected in some form to someone not having had a good sleep the night before.



## Pilots are mandated to take sleep breaks

Well pilots are mandated by Federal Aviation Administration (FAA) regulations for taking sleep-breaks. They have to compulsorily indulge in rest periods for certain amounts of time. As to the crew, various categories have been outlined by regulators. Class 1 rest areas or bunks are put around the passenger compartment. Class 2 can be separated from passengers through the use of a curtain (and may be flat-first seats). Class 3 seats are on the cabin or flight deck. They can recline 40 degrees and should provide leg and foot support.

## Mattresses change over the time

In the 50s, most mattresses were foam rubber while the 60s brought in a whiff of hippie culture and water-beds. The size of the bed changed into king and queen categories with the 70s and 80s. Today we are talking not just about sleep beds but sleep sanctuaries.



## Emergence of green mattresses

The market is emerging for green mattresses now. Use of natural latex from tree-tapped and sustainable sources, natural New Zealand wool, and certified organic cotton is what Avocado Green Mattresses claims to be using, for instance, as the maker of eco-friendly mattresses and pillows.

## Snoring man invents a pillow to stop snoring

It took days of snoring and marital strife before a cabbie driver became a pillow innovator. Yes, 42-year-old Phil Moore was sleeping alone for five years as his loud snoring was unacceptable to his 43-year-old wife Stephanie. Being on the living room sofa made this man think of a solution. And so came, thanks to a dream he had, a pillow to stop the snoring. It does so by making it possible to sleep in the front and easily. He then ran into a patent lawyer while driving him to a destination one day, and lo! Today Phil is selling MooreZzzleep.



## The tug of war

Bloggers and sleep experts can give nightmares to sleep industry leaders too. This happened when Derek Hales from Sleepopolis sued Casper when the company sued Derek and two other mattress reviewers. He refused to take down his reviews of the mattress and engaged in a multi-million dollar lawsuit that defined the contours of reviewers and industry for the future.



## Do not correct your pillow – not too much

As per Consumer Reports, even if a cervical pillow is supposed to relieve neck pain, what ultimately matters is the right fit and usage. Wrong adjustments of the height can still affect the neck and cause more pain. Do not over-correct what is wrong with current pillow, experts add here.







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