

Exporting Christmas tree decoration in Europe

The European market for Christmas tree decorations is growing, along with consumers' holiday spending. This offers you opportunities, as most European imports of Christmas articles come from developing countries. China's low prices and large-scale production dominates the mid-market. To compete, you can focus on niche markets like sustainable Christmas tree decorations. Premium niches are small, but may be profitable if you can offer high quality or more exclusive products.

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1. Product description

At retail level, Christmas tree decoration is often classified under "Seasonal". It is used to decorate Christmas trees at Christmastime. It includes baubles, tree toppers, figurines and other decorations, and can even extend beyond the tree. As Christmas tree decoration varies greatly, production methods and materials also differ.

This study focuses on products with a low-tech, hand-made and natural character. It uses the following codes to indicate trade in Christmas tree decorations:

Table 1: Product codes

Harmonised System (HS)	Prodcom	Description
9505 10 10	32 99 51 30	Christmas articles, of glass (excluding electric lighting sets)
9505 10 90	32 99 51 30	Christmas articles (excluding glass, candles and electric lighting sets, natural Christmas trees and Christmas tree stands)

European consumers see the holiday season as an important shopping moment. Sales in home decoration reach their annual peak between August and December. Christmas shopping can be quite impulsive, as consumers tend to forego their price sensitivity during this time.

Decorating both the inside and the outside of the home is an important buying motive at this time of year. Accessories express the sentiment of the season, ranging from sheer joy to a sense of spirituality. For many, Christmas is also related to giving. Friends and family exchange presents and have Christmas dinners together.

Tips:

Lighting is of vital importance to express the joy of Christmas, including candlelight, Christmas tree lights and decorative outdoor lighting. These product groups are outside the scope of this report. For more information about candles, see our studies about [candles](#) and [candleholders](#).

Dinnerware is also a prime product group for Christmas, as consumers use this occasion to elaborately decorate the table. For more information about these products, see our studies about [dinnerware](#), [glassware](#) and [cutlery](#).

Nativity sets are another popular type of Christmas decoration. For more information, see our study about [nativity sets](#).

Themes

The driver behind Christmas tree decoration is the consumer's desire to create an ambience, a feeling of cosiness in the home. A warm and inviting atmosphere with, for many, a touch of spirituality.

A number of influences add to this ambience:

- religion/spiritual (angels, bells, nativities)
- Santa Claus or Father Christmas (reindeers, sleigh, socks)
- winter season (snowflakes, snowy trees, starry nights)
- references to the innocent childhood or to peace and tranquillity in general (Dickens stories or Disney)
- romance (hearts and other love tokens, to represent cosying up with close ones)

Tip:

Stick to these themes, but also add to them. Consumers want to see familiar themes in a new version every Christmas. This allows them to shop, give and decorate again.

Quality

Because of the emphasis on home atmosphere, the product quality of individual Christmas tree articles is less important than how they fit into the theme. They need to hang properly because if they drop out of the tree, they are usually beyond repair.

Durability

Christmas items are seasonal and trendy. As consumers often want to update their Christmas tree look every year, they regularly replace Christmas accessories by the latest on offer. This makes durability a less prominent quality norm than usual for home decoration.

Material

Materials range from glass to wood, from ceramics or fabric.

Design

As a consumer event, Christmas is a mass market and essentially a mid-market in terms of its consumer values.

This means that prices and designs need to be accessible to the majority of consumers.

As consumers want choice, Christmas tree articles come in different sizes, shapes, colours and materials. However, the simple round bauble (with a diameter of around 7 cm) still dominates. They can be sold in convenient collections and sets, to make choosing easier for consumers. In the more premium niches, product and aesthetic quality are key.

Labelling

- Information on the outer packaging of Christmas tree decorations should correspond to the packing list sent to the importer.
- External packaging labels for Christmas tree decoration should include the producer, consignee, material, quantity, size, volume, country of origin and caution signs. They should also show the number of pieces, bale/box identification, total number of bales or boxes and net and gross weight.
- EAN or barcodes on the product label are common in Europe.
- Your buyer will specify what information they need on the product labels or on the item itself, such as logos or “made in...” information. This is part of the order specifications.
- Use the English language for labelling, unless your buyer indicates otherwise.
- For glassware and porcelain articles, boxes should be labelled with warning notices such as “FRAGILE!” or “Handle with care!”

Packaging

Importer specification

You should pack Christmas tree decorations according to the importer’s instructions. They have their own specific requirements for the use of packaging materials, filling boxes, palletisation and stowing containers. Always ask for the importer’s order specifications. These are part of the purchase order.

Damage prevention

Properly packaging Christmas decoration minimises the risk of damage by shocks or humidity. How an item is packaged for export depends on how easily it can be damaged. Packaging should ensure the items inside a cardboard box cannot damage each other. It should also prevent damage to the boxes when they are stacked inside the container. Packaging therefore usually consists of outer and inner cardboard boxes filled with protective materials like bubble wrap or paper.

Dimensions and weight

Packaging must be of easy-to-handle dimensions and weight. Standards are often related to labour regulations at the point of destination, specified by the buyer. Boxes are usually palletised for air or sea transport. Make maximum use of pallet space.

Cost reduction

Nesting or stacking the items inside the container reduces costs. While packing has to provide maximum protection, you must also avoid using excess materials or shipping “air”. Waste removal is a cost to buyers.

Material

Importers are increasingly banning wooden crating and packaging due to their unsustainability and high material and disposal costs. Economical and sustainable packaging materials are more popular. Using biodegradable packing materials can be a market opportunity. For some buyers, it can even be a demand.

Consumer packaging

Retailers often sell Christmas tree decorations as loose items. This allows consumers to create their own

collection. Therefore consumer packaging is not very relevant and seasonal wrapping is done at the point of sale. In the lower segments pre-packaged sets come in basic functional packaging. If the retailer wants to add their branding to the final gift you may be asked to print tags or labels, but these are usually part of the retailer's own marketing communication and produced in Europe.

2. Which European markets offer opportunities for exporters of Christmas tree decorations?

European imports of Christmas articles are growing, with the majority sourced from developing countries. The United Kingdom is by far the largest importer of Christmas articles in Europe, with a strong imports from developing country suppliers. This makes it an especially interesting focus market. Other promising markets are Germany, the Netherlands and Italy.

Where is consumer demand?

- European demand for Christmas articles increased between 2012 and 2016. With an average annual growth rate of 6.6% it reached €891 million in 2014.
- Demand is highest in the United Kingdom at €262 million, Italy follows at €129 million.

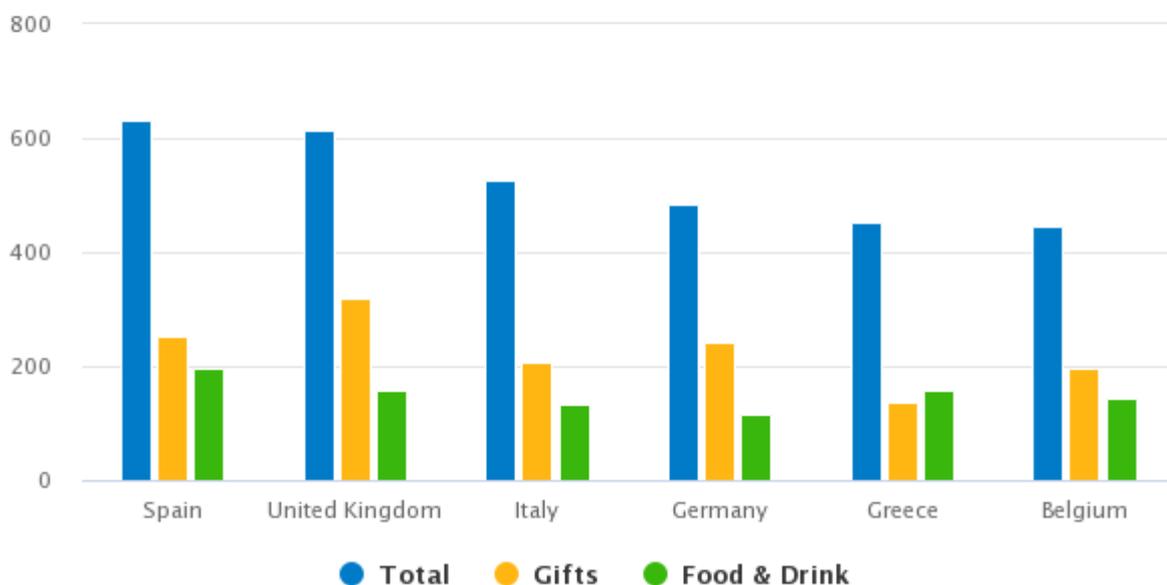
What is the role of European production in supplying European demand?

- Europe's demand for Christmas articles is significantly higher than its production. This drives imports, making Europe an interesting market.
- European production of Christmas articles decreased between 2012 and 2016. With an average annual growth rate of -8.8%, it fell to €79 million in 2016.
- Italy is responsible for 46% of European Christmas article production, followed by Poland with 23%.

Which countries are most interesting in terms of Christmas spending?

Figure 1: European holiday spending per consumer

in €

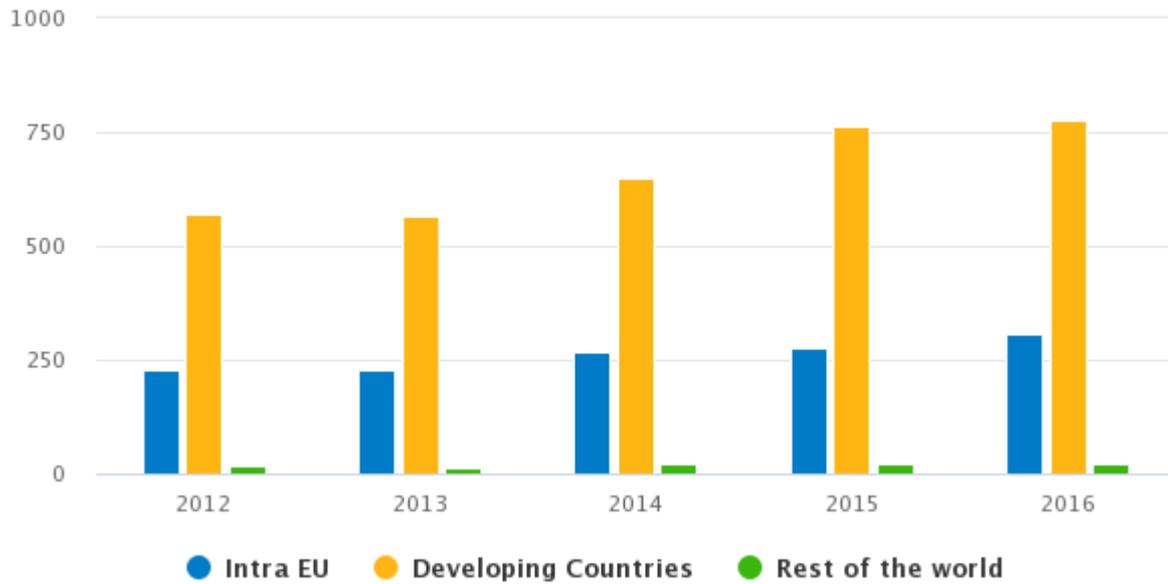


Source: Deloitte Christmas Survey 2017

On average, European holiday spending for 2017 is estimated at €445 per consumer. This was an increase of 2.6% compared to 2016. Some 42% (€188) of this was spent on gifts, a further 30% (€131) on food and drink. These categories are especially relevant for the sales of home decoration products. Consumers in Spain and the United Kingdom are expected to be the top spenders, with British consumers leading on gifts.

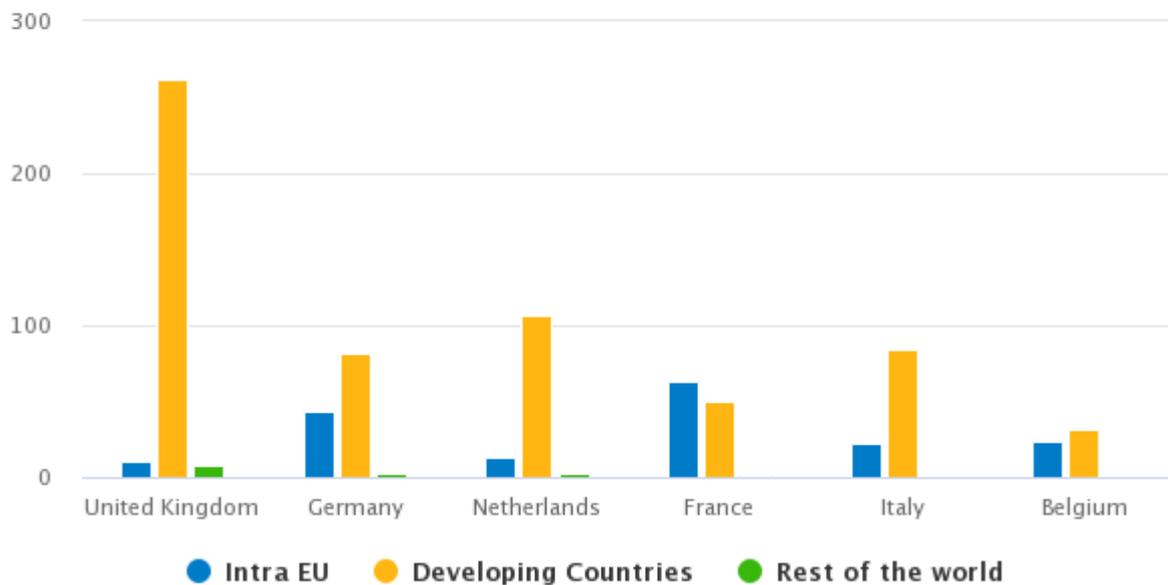
Which countries are most interesting in terms of imports from developing countries?

Figure 2: European imports of Christmas articles
in € million



Source: Trademap

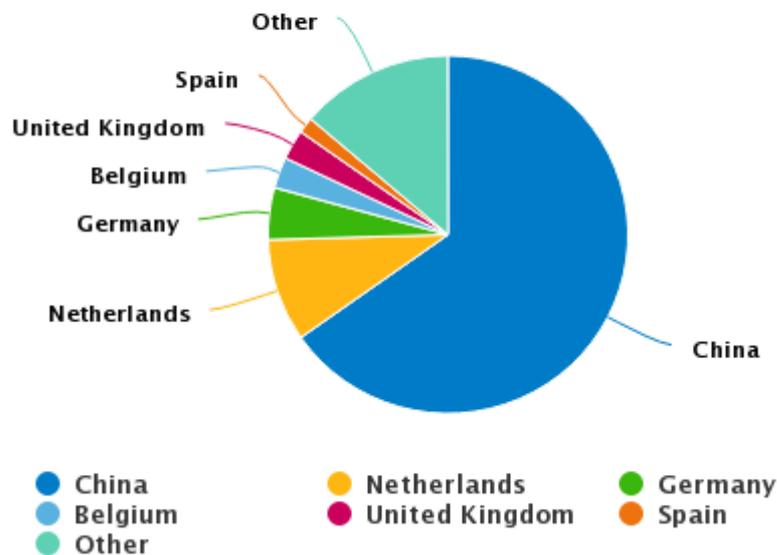
Figure 3: Main importers of Christmas articles
in € million



Source: Trademap

Figure 4: Leading suppliers of Christmas articles

in € millions



Source: Trademap

- European imports of Christmas articles increased from €814 million in 2012 to €1.1 billion in 2016. This resulted in an average annual growth rate of 8.0%.
- In the coming years, European imports are expected to keep growing moderately.
- Developing countries are Europe's main source of Christmas articles. They supply 70% of European imports, amounting to €778 million. This share is predicted to be fairly stable in the coming years.
- In reality, a lot of the Christmas articles imported from western European countries actually concerns re-exporting products manufactured in developing countries.
- The United Kingdom is Europe's leading importer of Christmas articles by far, at €281 million in 2016, followed by Germany (€126 million) and the Netherlands (€123 million).
- The United Kingdom is also the leading importer of Christmas articles from developing countries, at €262 million. This is 93% of its total imports of Christmas articles!
- The Netherlands and Italy also source 87% and 79% of their imports from developing countries respectively.
- The United Kingdom increased its imports from developing countries by €109 million between 2012 and 2016, followed by the Netherlands at €206 million and Italy at €18 million.
- China dominates European Christmas article imports, with 65% in 2016. Other leading developing country suppliers are Thailand (1.3%) and India (1.1%).
- Although the Netherlands is the second largest supplier, these supplies mainly consist of re-exports of products from China.

Tips:

Study your options in the United Kingdom, Germany, the Netherlands and Italy. Their strong imports from developing countries make these markets especially interesting.

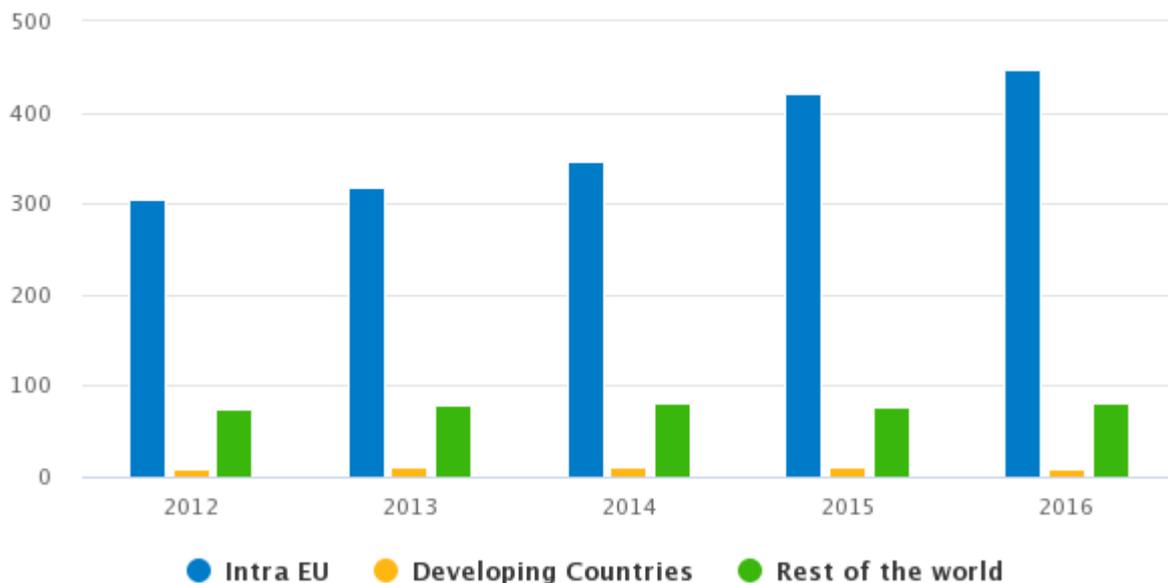
Compare your products and company to the strong competition from China, as well as from India, Indonesia, Nepal and Thailand. You can use [ITC Trademap](#) to find exporters per country. You can compare on market segment, price, quality and target countries.

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What role does export play in supplying European demand?

Figure 5: European exports of Christmas articles

in € millions

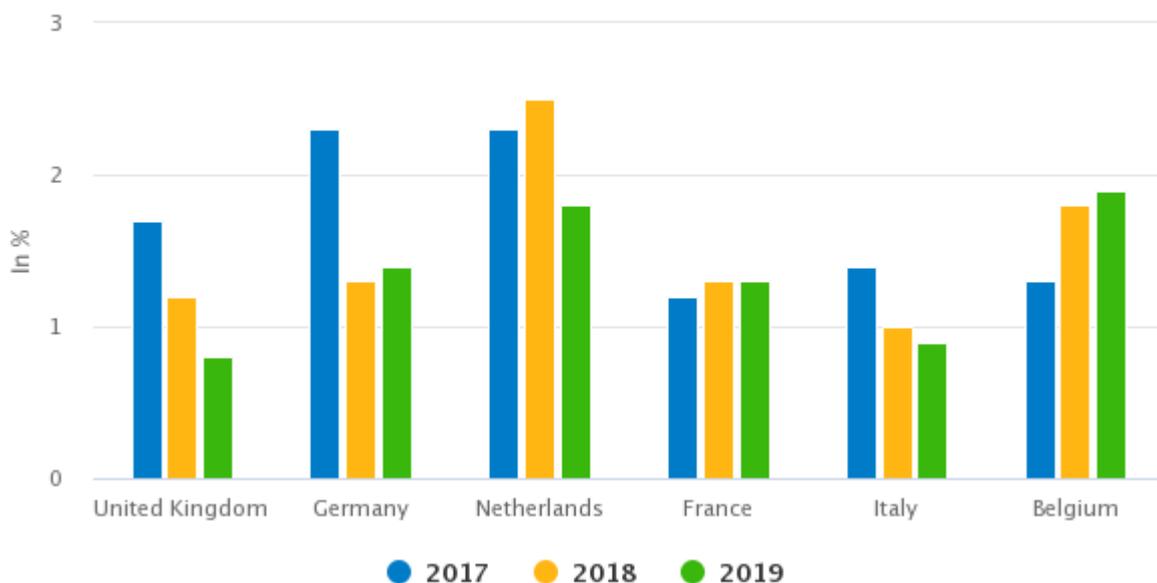


Source: Trademap

- European exports of Christmas articles consist mainly of trade within Europe.
- The Netherlands is Europe's leading Christmas article exporter at €243 million.

Figure 6: Real private consumption expenditure growth

in %



Source: Eurostat

- Private consumption expenditure is an important indicator for the European home decoration market. The sector is closely linked to economic conditions. When money is tight, consumers postpone buying non-essential items until they have enough disposable income.
- Between 2017 and 2019, European private consumption expenditure is expected to increase, so consumption of decorative products is likely to rise. Especially in emerging markets, consumers will have

more money available to spend on decorating the home. Consumers in mature markets already spend a fair amount of money on decoration, so growth in their consumption will be moderate.

3. What trends offer opportunities on the European market for Christmas tree decorations?

Familiar and changing consumer values around Christmas

As a specific seasonal purchase, Christmas tree decorations corresponds to a number of familiar consumer needs that typify Christmas. However, some of these consumer needs are changing.

The Christian-religious character of Christmas appears to be changing. In what is often referred to as “Post-Christian Europe”, Christmas may become a spiritual or social event more general in character. As a result, decoration may become less overtly religious in image and character.

The ambience consumers try to create at Christmastime is underpinned by a number of psychological needs, influencing their Christmas purchases:

- Religion or spirituality – Christmas decoration often uses religious imagery, such as angels and nativity scenes. For the mainstream consumer, the religious element adds to the cosiness of Christmas and as such is more emotional than spiritual. However, this differs per consumer, with some putting more emphasis on the religious aspect. If the Christian element does get reduced, the religious story itself may survive in a more worldly sense.
- Nostalgia – during Christmas, consumers are deeply influenced by a need to travel back to the innocence of childhood or to peace and tranquillity in general.
- Escapism – Christmas allows consumers to retreat into the comfort of a good story, away from their busy daily lives. There are many stories available, such as the Santa Claus or Father Christmas story, the nativity of Jesus, winter tales, fairy tales and nostalgia.
- Sharing and socialising – during Christmas, consumers eat and cook together, make family calls, decorate the home together, cosy up. A spirit of goodwill, solidarity and presenting gifts is part of the Christmas sentiment. Christmas tree decorations are traditionally a great gift.

Tips:

Strategic marketing of Christmas tree decorations can consist of three main strands:

Further penetrate the religiously motivated western European market for Christmas decoration with the help of active sales and price (discount) strategies. As this segment seems to be in decline, you may need alternative strategies.

Develop new markets in Eastern Europe, where Christianity (especially Catholicism) is still strong and disposable income for decoration increasing. Marketing will predominantly take place through western European (especially German and Dutch) distributors that already have a strong footing in the Christmas market, including in Eastern Europe.

Develop a more general Christmas imagery for the western European consumer. This approach is more challenging.

Replacing or collecting

Christmas decoration is a relatively conservative market, especially in terms of its colour palette and larger themes. In the middle segments of the European market, the basic premises will not change. For example, the Christmas tree as the centrepiece, colours such as green, red, silver and gold, as well as symbols such as balls, stars and angels. They are part of the consumer’s identification with the Christmas season.

However, within these parameters, life cycles of product lines or collections can be extremely short, some lasting only a single season. The almost total annual renewal of collections demands supreme flexibility from suppliers. This innovation takes the form of “restyling”, or adding new colours and decorations to existing forms or items.

On the other hand, an increasing consumer trend within the celebration theme is collecting. Instead of replacing previous years’ decoration, there are also consumers who enjoy buying additions to previously issued decoration to complete or add on to their existing sets.

Tips:

First and foremost, work from the accepted look and feel of Christmas tree decoration.

If you already supply home decoration to mid-end markets, you can move into the festive market relatively easily, as you are already used to manufacturing nostalgic or romantic products.

Offer flexibility to meet the demand for innovative designs.

Distinguish yourself with materials (new, local) or material combinations rather than ethnicity. Ethnic styles are quite limited in mainstream demand.

Also consider entering the Christmas segment as a way of learning about range development. Larger importers often start their development more than 18 months in advance, tackling the process step by step, from mood board creation to sampling and trade fair promotion. Being part of this process helps you become a professional supplier.

Interest in sustainability is increasing

The continuing sustainability trend is pressuring suppliers to source more ethical and sustainable products, especially in western Europe. Specific certification (such as fair trade or responsibly sourced materials) may be necessary to supply certain buyers and to enter certain (niche/premium) markets. Moreover, certification adds value to a product and increases its competitiveness.

You can deviate from the norm in niche segments. The more niche the segment, the greater the freedom to develop your own style or go beyond the normal associations dominating Christmas collections. In premium segments, Christmas items are often a sideline rather than rigid concepts. Humour or even minimalist styles may appeal here, as well as green values and natural concepts.

Tips:

The fair-trade movement is traditionally a market segment offering religious and Christmas-related collections that may be interesting for you, especially if you reflect a more local culture in your styles.

Offer background stories (for example on making and makers) and excellent service (like extra spare parts, pre-stocking) to help the importer build and maintain a brand.

The Christmas segment is expanding

The Christmas market, like home decoration in general, is becoming more of a lifestyle affair. This means it will involve even more product categories. The fragrance industry is entering the market, while personal

accessories, home textiles and even furniture are getting a Christmas twist; all are responding to similar trends. Trade fairs (such as Christmasworld in Germany) are now seen to combine festive sales with general home and garden.

Tips:

If you are already involved in Christmas tree decoration, it may be fruitful to add more general home categories to your offer, and show them in a single collection and trade fair. If you come from home decoration, you can add Christmas as a category and aim at lifestyle buyers.

Note that the timing of your marketing of Christmas tree decorations matters. If you launch early in the year, and have the productivity to supply to exports for the Christmas of that same calendar year, you will not have to pre-stock. If you launch later in the year and/or have limited production capacity, pre-stocking may be necessary. Alternatively, you communicate this is a Christmas collection in the next calendar year.

Convenience is key

Convenience is an important trend in this market. Importers have a preference for “one-stop shopping”: finding everything at one supplier, for example a tree, its decorations and the lighting, but perhaps also non-Christmas related home decorations. With so much pressure on costs and efficiency, importers also look for exporters offering complete concepts, wide variety and flexibility in product development.

Tip:

Offer opportunities for “one-stop shopping” with a broad set of categories, materials and techniques, and flexibility in product development. If you can also supply the buyer’s non-festive collections, your position may be even stronger.

Christmas going premium

Essentially a mass segment, Christmas tree decorations reflect an increasing appreciation for more premium offers, such as ones involving greater authenticity (new stories from previously unheard cultures), higher exclusivity (limited edition creates rarity) and premium handmade. All of these factors are essentially taking Christmas decoration from mass and broad mid-market to a higher, less price-sensitive segment. These new values potentially create new opportunities for you.

Tip:

Show your handmade designs, tell your maker and making stories, and sell your offer through smaller, niche partners in the mid-high segment of Christmas decoration.

For more information, see our study about [trends for Home Decoration & Home Textiles](#).

4. With which requirements must Christmas tree decorations comply to be allowed on the European market?

With which legal and non-legal requirements must your product comply?

General product safety

The European Union's [General Product Safety Directive](#) applies to all consumer products, including Christmas tree decoration. It states that all products marketed in Europe must be safe to use.

Tips:

Read more about the [General Product Safety Directive](#).

Use your common sense to ensure normal use of your product does not cause any danger.

The [RAPEX database](#) lists products that the European Union has rejected at the border or withdrawn from the market. Check the database for similar products for an idea of what issues may arise.

Packaging legislation

Europe has specific [packaging and packaging waste legislation](#). It for instance restricts the use of certain heavy metals. Europe also has [requirements for wood packaging materials](#) (WPM) used for transport, such as packing cases, boxes, crates, drums, (box) pallets and dunnage.

Tip:

Read more in the [overview of EU rules on wood packaging material](#).

Restricted chemicals: REACH

The [REACH](#) regulation lists restricted chemicals in products that are marketed in Europe. For example, REACH restricts the use of:

- lead in the paints and glazing of ceramics
- cadmium compounds in various applications
- arsenic and creosotes as wood preservatives.

Tip:

The European Chemical Agency provides useful information and tips on REACH. See for instance [REACH Annex XVII](#) for a list of all restricted chemicals. Also check out the [Information on REACH for companies established outside Europe](#) and the [Questions & Answers on REACH](#).

Products resembling foodstuffs

The European Union's directive on [products resembling foodstuffs](#) bans products from the European market that imitate food so closely they could be confused for edible products. A variety of products fall within this category, such as food-shaped Christmas ornaments.

Tip:

For an idea of what kind of product is prohibited, see [How to assess whether a product is safe or not](#).

Wildlife Trade Regulations and the Timber Regulation

The [Wildlife Trade Regulations](#) restricts the international trade in specimens of wild animals, plants and derived wildlife products. This is the European Union's strict implementation of the [Convention on International Trade in Endangered Species](#) (CITES). According to the [Timber Regulation](#), you must prove any timber used was harvested legally. This also applies to wooden Christmas tree decoration. Products with a [FLEGT](#) or [CITES](#) licence comply with the Timber Regulation.

Tips:

For more information, see the [Reference Guide to the Wildlife Trade Regulations](#) and the [Frequently Asked Questions about the Timber Regulation](#).

For more information on CITES permits, you can contact your [National CITES Management Authority](#).

For more information about [FLEGT licensing](#), see the [FLEGT licence information point](#).

5. Which additional requirements do buyers often have?

Sustainability

Social and environmental sustainability will make your products stand out on the European market. Consider sustainable raw materials and production processes. European buyers increasingly demand the following certification schemes.

- [Business Social Compliance Initiative \(BSCI\)](#): European retailers developed this initiative to improve social conditions in sourcing countries. They expect their suppliers to comply with the BSCI Code of Conduct. To prove compliance, the importer can request an audit of your production process. Once a company has been audited, it is included in a database for all BSCI participants.
- [Ethical Trading Initiative \(ETI\)](#): This initiative is an alliance of companies, trade unions and voluntary organisations. It aims to improve the working lives of people across the globe who make or grow consumer goods.

You can use standards such as [ISO 14001](#) and [SA 8000](#) to read up on sustainable options. However, only niche market buyers demand compliance with such standards.

Tips:

Optimise your sustainability performance. Reading up on the issues included in the initiatives will give

you an idea of what to focus on.

Buyers appreciate a good story. If you can show that you value your company's environmental and/or social performance, this may be a competitive advantage. Consider a self-assessment like the [BSCI Self-Assessment for Producers](#), or a code of conduct such as the [BSCI Code of Conduct](#) or the [ETI base code](#).

For more information, see our special study on [Sustainability in the Home Sector](#).

6. What are the requirements for niche markets?

Fair trade

The concept of fair trade supports fair pricing and improved social conditions for producers and their communities. Especially when the production of your Christmas tree decorations is labour-intensive, fair-trade certification can give you a competitive advantage.

Common fair-trade certifications are from:

- [World Fair Trade Organisation \(WFTO\)](#)
- [Fairtrade International](#)
- [Fair For Life](#).

Tips:

Ask buyers what they are looking for. Especially in the fair trade sector, you can use the story behind your product for marketing purposes.

Check the [ITC Standards map database](#) for more information on voluntary standards and their requirements, including fair production.

FSC certification

[FSC](#) (Forest Stewardship Council) certification is the most common label for sustainable wooden products, including wooden or paper Christmas tree decorations. The FSC label guarantees that a product's source material comes from responsibly managed forests. These products are especially popular in western European markets.

Tips:

For more information, see the [three steps towards FSC certification](#).

If you use recycled paper, you can apply for the [FSC Recycled label](#).

Crystalline silica in ceramics

[Respirable crystalline silica](#) (RCS) can cause lung cancer through inhalation. The ceramics industry mostly uses crystalline silica in the form of quartz and cristobalite. Although European legislation cannot regulate working

conditions in non-European countries, European buyers care about worker safety. They may demand proper handling of crystalline silica during production.

Tip:

See the [European Network on Silica](#) for more information in various languages. For instance the [Agreement on Workers Health Protection through the Good Handling and Use of Crystalline Silica and Products containing it](#), a [Good Practice Guide](#) and the European national [Occupational Exposure Limits](#).

For more information, see our study about [buyer requirements for Home Decoration & Home Textiles](#).

7. What competition do you face on the European Christmas tree decoration market?

Competition in the Christmas tree decoration sector does not differ significantly from the sector in general. Refer to our [10 tips for doing business with European buyers](#).

8. Which channels can you use to put Christmas tree decorations on the European market?

The market channels and segments for Christmas tree decorations do not differ significantly from the sector in general.

Market channels

Christmas tree decorations can be found almost anywhere, from department stores to garden centres, offline and online.

E-commerce

E-commerce in home decoration is increasing and can help you reach a broader range of customers. Retailers often combine online and offline channels. Consumers research and purchase products online, shopping around and comparing prices on home decoration items. Small (gift) items like Christmas tree decorations are especially suitable for this. To supply e-commerce retailers, you must be able to work with individual packing and labelling, as well as limited minimum orders.

Tips:

See our special study about [E-commerce in Home Decoration & Home Textiles](#) for more information.
Target online business-to-consumer retailers if you can meet the additional requirements.

Trade associations and fairs

The following trade associations and fairs are useful sources for finding trading partners in Europe.

- [Aid to Artisans](#), international non-profit organisation for the craft sector
- [Ambiente](#), Frankfurt, February
- [Cerame-Unie](#) (European Ceramic Industry Association), represents the European Federation of Ceramic Tableware and Ornamental Ware (FEPP)
- [Christmasworld](#), Frankfurt, January
- [Maison et Objet](#), Paris, January (main event) and September
- [Tendence](#), Frankfurt, August

Market segments

Christmas tree decorations are generally a mid-market product. They are accessibly priced goods with widely appealing designs in a number of set styles and “atmospheres”. The premium niches in mature markets offering high design, limited editions and branding are relatively small. They may, however, be quite profitable.

9. What are the end-market prices for Christmas tree decorations?

Table 2 gives an overview of the prices of Christmas tree decorations in the mass, mid and premium market segments.

Table 2: Indicative consumer prices of Christmas tree decoration

	Mass	Mid	Premium
Christmas tree decoration	Under €5	€5–15	€15 and up

Consumer prices depend on the value perception by the consumer in a particular segment. This is influenced by your marketing mix: product benefits, promotion (brand or not, communication of product benefits), points of sale (reseller positioning), and a matching price.

Shipping, import and handling add 25% to the price of your Christmas tree decoration. Wholesalers account for a further 100% markup. Finally, retailers may add another 100–150% to the price.

Tips:

The value perception of your product in the chosen segment determines its price. The quality and price of your Christmas tree decorations must match what is expected in your chosen target segment. To determine your price, study consumer prices in your target segment. Adjust your price accordingly.

Understand your segment. Offer a correct marketing mix to meet consumer expectations. Adapt your business model to your position in the market.

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