



CBI  
*Ministry of Foreign Affairs*

# **CBI Product Factsheet: Ornithogalum in the UK Market**

## Introduction

The market for bouquets in the UK is expected to increase slightly in the coming years. Ornithogalum will remain a popular bouquet filler. Most Ornithogalum that can be found in the UK is traded via the Dutch auction. This factsheet covers product specifications, prices, important phytosanitary and marketing requirements, and statistics about trade and consumption with respect to the market for Ornithogalum (Asparagaceae) in the United Kingdom.

## Product description

Ornithogalum is a genus of perennial plants native to southern Europe and southern Africa. Species have linear basal leaves and a slim stem, up to 30 cm or more in size. It has clusters of typically star-shaped flowers, with black eyes. The colour of the flowers is usually white, green or yellow.

The common name of the genus, Star-of-Bethlehem, is based on its star-shaped flowers, after the Star of Bethlehem that appeared in the Biblical account of the birth of Jesus.

After harvest, the bulbs are uprooted and treated with heat or cold to control the flowering time. Ornithogalum is a summer flower, but is available all year round. It is a strong cut flower with a long vase life. The flower is widely used in arrangements and bouquets.

Wholesale traders active on the British flower market buy their Ornithogalum at the Dutch flower auction. This comprises a limited number of UK based traders, but also a large number of specialised Dutch wholesale traders. In addition there are direct sales between retailers, traders and exporters. This often comprises flowers coming from Kenya.



Source: Shutterstock.

## Product specification

Many Ornithogalum in the UK are supplied via the Netherlands. The Netherlands is at the centre of the European flower trade and most Ornithogalum is sold via the Dutch auction. There is an excellent system of traders and logistical service providers to facilitate the trade in cut flowers. There are specific requirements regarding quality, size, packing and labelling set by the Dutch Flower Auctions Association ([VBN](#)). For Developing Country exporters (DCs), the auction serves as an important trade platform; we therefore refer mainly to these requirements that are widely adopted as minimum requirements across the entire cut flower industry.

## Quality

Ornithogalum can be traded in 3 quality groups: A1, A2 and B1, depending on the extent to which they meet quality and grading criteria. The VBN requirements consist of two parts: general requirements for all supplied flowers and specific requirements for specific flowers. The following specific requirements apply for all Ornithogalum:

The batch must be free of excess shoots;

- The batch must be free of torn flowers;
- The stems should contain 50% green leaf.

Growers are responsible, through self-assessment, for grading and the reliability of the information they provide with their lot, however the auction checks the lots on a random basis.

## Size and packaging

An issue with the transportation of Ornithogalum is that buds can become deformed during transport and special attention should be given to this. Therefore it is important to give your flowers water treatment before transportation.

Exported and imported Ornithogalum are often traded in cardboard boxes. Flowers are repacked into plastic flower containers (buckets) at the flower auction or at the importing wholesaler. For packing and loading, VBN gives detailed information about requirements for summer flowers:

Summer flowers traded per stem or branch should, depending on the product:

- Be supplied in bunches of 5 or 10 stems
- Be bundled in bunches of 5, if they are to be bundled
- Be packaged in a sleeve per bunch or bundle
- Be supplied in a cut flower container or a box.

If the product's composition is so heavy that the product would be damaged if the above requirements were met, you can deviate from these packaging regulations after consulting the relevant auctioneer and obtaining their permission.



Source: FloraHolland.

## Labelling

When exporting through the Dutch auction, the flowers are often loaded onto a stacking cart. Every stacking cart must be accompanied by a fully and correctly filled-in consignment note containing information about the relevant cart. In addition every packaging unit needs to be labelled with product and supplier information, namely

- Supplier number and name;
- Variety name;
- Amount per packaging unit;
- Grading marks (Class A1, A2, B1).

Additional product labelling will generally take place at the auction/ wholesaler or bouquet producer. During trade, some important quality labelling is necessary, including: tracking/tracing codes and the GLOBALG.A.P., MPS, FFP, or other identification (see next section).

## Analysis and interpretation

Most Ornithogalum is sold via the Dutch auction. A small number of growers from developing countries export directly to the UK market without using the auction clock. Also, Dutch wholesale traders are increasingly trading DC flowers directly with UK retailers. In general, the principal product requirements given above are also applicable on the direct market.

### Tips:

- Visit the [VBN](http://www.vbn.nl) website to find out about changes in product specifications.
- Information about UK wholesale traders can be found through the UK flower wholesale trade association: <http://www.fwta.co.uk/>

However supplying directly can be more demanding in terms of additional requirements. Retailers often request a constant supply of flowers over a fixed period. In addition payment terms differ from the flower auction and can be longer.

**Tip:**

- Contact your import agent or your potential client about any additional requirements if you wish to supply directly.

## Buyer requirements

Buyer requirements can be divided into (1) *musts*, requirements you must meet in order to enter the market, such as legal requirements, (2) *common* requirements, which are those most of your competitors have already implemented, in other words, the ones you need to comply with in order to keep up with the market, and (3) *niche* market requirements for specific segments.



## Requirements cut flowers marketed in the EU must meet

### Plant health

Carnations exported to the EU, must comply with the EU legislation on plant health. The EU has laid down phytosanitary requirements to prevent introduction and spread of organisms harmful to plants and plant products in the EU.

Carnations imported in the EU must be accompanied by an official "phytosanitary certificate" guaranteeing the phytosanitary conditions of plants and plants products, and also that the shipment has been officially inspected, complies with statutory requirements for entry into the EU and is free of quarantine pests and other harmful pathogens. Phytosanitary certificates are issued by your National Plant Protection Office (NPPO).

**Tips:**

- Check with the relevant National Plant Protection Organisation for the exact procedures to get the phytosanitary certificate. Click [here](#) for a list of NPPOs
- A model phytosanitary certificate can be found in [AnnexVII](#) of the Plant Health Directive.
- Check if your country and the country you want to export to have implemented digital services to facilitate the process of import and export. For example in Holland there is the [CLIENT export](#) system, which is also used by the Kenyan and Ugandan inspection authorities.
- Read more about [plant health](#) in the EU Export Helpdesk

## Endangered Species – CITES

If you are exporting carnations that are listed as endangered according to the international CITES convention (e.g. certain orchids), you have to take specific procedures into account, to prove that trade will not be harmful to the survival of the specie in the wild. If your product is listed in [Annex A and Annex B](#) of Regulation (EC) No 338/97 all exports need to be accompanied by an export permit from the your country's CITES authority and an import permit from the authorities in the country you are exporting to.

**Tips:**

- Check in the Annexes if import and export permits are required for your product. If you are not sure, contact [your local CITES authority](#).
- Getting all CITES documents may take some time (especially when you are a new exporter, not known yet by the authorities). Since timing is essential when handling with perishable goods as cut carnations, try to anticipate on possible delays during the application for a permit.
- Read more about [CITES](#) in the EU Export Helpdesk.

## Intellectual Property Rights (IPR)

Developing new plant varieties is often very expensive. The developers of new varieties are often European companies and they want their return on their investments. To avoid that just anybody can use these new varieties, they are protected by intellectual property rights. In recent years, there has been a growing attention for these breeders' rights and illegal products are rejected from the market.

**Tips:**

- Make sure that you know exactly who owns the IPR for your species and pay necessary royalties.
- An interesting trend is that breeders' only let their new variety be grown by a select group of growers. Staying in contact with breeders and offering perfect conditions to grow their new variety may therefore be an advantage

## Full overview of requirements for carnations:

For a list of requirements for carnations consult the [EU Export Helpdesk](#) where you can select your specific product under chapter 0603.

**Tip:**

- Familiarise yourself with the protection frameworks for new plant varieties, for example from the [Union for the Protection of New Plant Varieties](#) (UPOV) or the [Community Plant Variety Office](#) (CPVO).

## Common buyer requirements: Sustainability

### CSR - Corporate Social Responsibility

EU consumers pay more and more attention to social and environmental circumstances during the flower production. As a result EU buyers require you to meet certain environmental and social standards in the form of certification of B2B schemes and consumer labels. Compliance with environmental standards (focusing on pesticide and water use) is a very common requirement, while social conditions are gaining importance.

The most important B2B scheme for flowers is [MPS](#). MPS ABC certification covers environmental performances and is considered a must for growers. Furthermore they have several other schemes such as MPS-SQ (focussing on social issues) , MPS-GAP (on Good Agricultural Practices) and MPS-Quality.

The most comprehensive scheme is MPS-Florimark, which is a combination of the aforementioned four schemes [GlobalGAP](#) is a B2B scheme originally focussing on Good Agricultural Practices. GlobalGAP has been the most important scheme for fruit and vegetables for years, but it is gaining importance for cut flowers as well, especially when selling to supermarkets.

**Tips:**

- Both buyers and consumers (especially in Western and Northern Europe) consider environmentally friendly production very important and this importance is expected to increase in the future. Becoming certified is essential.
- Use your good practices and certification as a marketing tool in the communication with (potential) buyers.
- There is an abundance of standards to choose from (although the actual criteria show a lot of similarities). To determine which scheme you should follow, the market your targeting will probably be decisive (which country do you want to export to and which trade channels do you use?)
- See [Channels and Segments](#) to see how market channels are changing
- Click [here](#) for an overview of all MPS schemes including links to the criteria per scheme.
- Click [here](#) for the relevant GlobalGAP standards for flowers and ornamentals.
- Check for existing initiatives in your country. Examples are the Colombian [Florverde](#) standards or the code of the [Kenyan Flower Council](#). Sometimes these local initiatives are benchmarked against GlobalGAP and/or MPS

**Private labels**

The increasing share of the 'unspecialised' market (supermarkets etc) in comparison with the 'specialised' market has also had its effects on the buyers' requirements. Several supermarket chains offer flowers under their own private labels often referring to social and environmental conditions at the production level.

**Tips:**

- If you want to target supermarkets directly, check which sustainability criteria they impose.

Furthermore importers may also participate in initiatives such as the [Ethical Trading Initiative](#) (ETI) in the UK, or the [Business Social Compliance Initiative](#) (in several Western European countries). These initiatives focus on improving social conditions in their members' supply chains. This implies that you, as a supplier, are also required to act in compliance with their principles.

**Tips:**

- Familiarise yourself with the [ETI base code](#) to check what [ETI members](#) require from their suppliers.
- Assess your company's current performance by doing a self-assessment, which you can find on the [BSCI website](#).

**Cold chain management**

Proper cold chain management has a positive effect on the quality and vase life of flowers. Therefore EU buyers' demands for cold chain protocols are growing. Note that, although improving your cold chain management may be a challenge, the higher product quality should also improve your profits.

**Tips:**

- Developing and implementing cold chain protocols will be vital to survival in the coming years.
- Do not wait until buyers ask for improved cold chain management, but anticipate on the developments.

## Niche markets CSR in consumer labels

### Fairtrade certification

Although CRS requirements are common buyer requirements, standards that are communicated through a consumer label still represent a relatively small part of the market, mostly in North-western Europe .

Examples of relevant consumer labels are: [Fair Flowers Fair Plants \(FFP\)](#), [Fairtrade International](#), [Florverde](#) and [Rainforest Alliance](#)

#### Tips:

- Always check with your buyer if he requires certification and which certification he prefers.
- Consult the [Standards Map database](#) for the different labels and standards relevant for cut flowers.

### Organic

Organic flowers are produced and processed by natural methods defined in [EU legislation](#). The market for organic flowers is however very small and most organic flowers sold are produced in the EU. Some flower traders perceive organic flowers as a lesser quality product due to a lower aesthetic quality and durability. As such, organic flowers are not much favoured in Europe yet.

#### Tip:

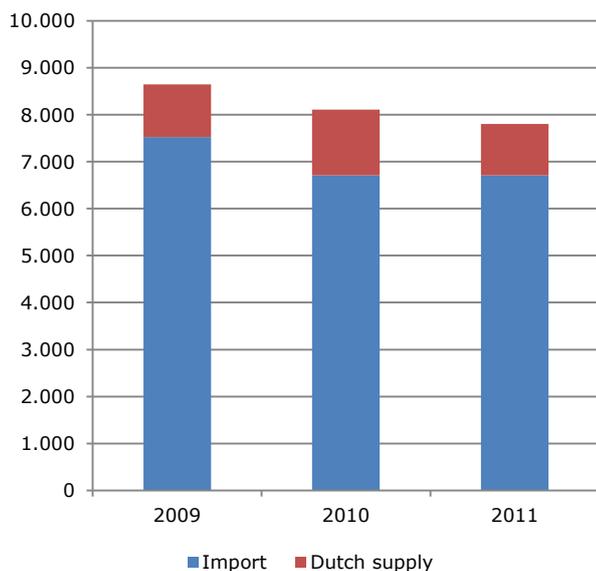
- Producing organic flowers can be a opportunity for future times.

## Trade and Macro-Economic Statistics

General information and figures about production and trade developments in the European market are provided in the [CBI Tradewatch for Cut flowers](#). This section provides you with more detailed statistics regarding the trade, production and consumption of fresh Ornithogalum in the UK.

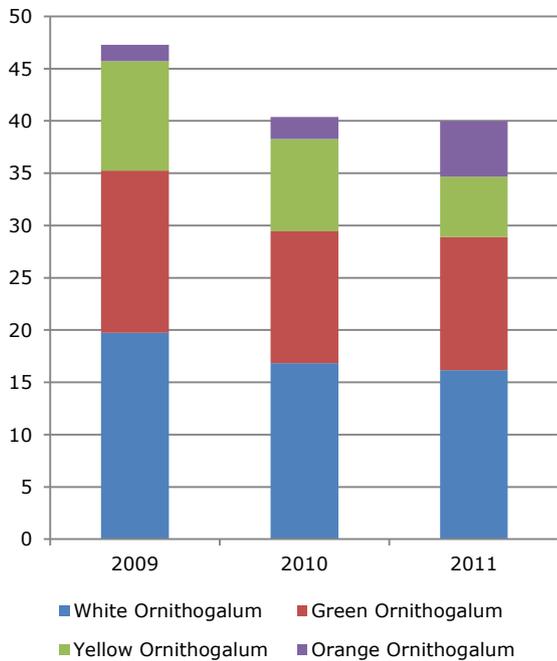
### Trade

**Figure 1: Trade of fresh cut Ornithogalum at the Dutch auction, 2009-2011, in €1,000**



Source: FloraHolland.

**Figure 2: Trade of fresh Ornithogalum at the Dutch auction by colour (intra and extra-EU trade), in 2011, in millions of stems**



Source: FloraHolland.

### Analysis and interpretation

Recent figures for Ornithogalum are not available. However, industry sources indicate that the UK market for Ornithogalum is stable or growing slightly. Most Ornithogalum for the UK market is and will continue to be supplied through the Dutch auctions. In 2011, the turnover of Ornithogalum at the Dutch auctions amounted to € 7.8 million, representing more than 40 million traded stems. In 2011, 87% of the Ornithogalum sold at the Dutch auctions was imported. The remaining 13% was supplied by Dutch growers.

#### Tip:

- For supplying the UK market, consider exporting via the Dutch auction or wholesale traders.

Direct Ornithogalum trade to the UK is limited. However some large retailers like Finlays import some Ornithogalum directly from countries such as Kenya. This share is low, however, compared to other flowers. The export of Ornithogalum to the UK market is handled by Dutch wholesale traders specialised in the UK market or summer flowers.

#### Tips:

- Trading directly as a DC supplier with the UK market is difficult since additional requirements are set with respect to quantity, quality and production. Several Dutch companies are specialised in supplying the UK market.
- Visit the website of the [Dutch Association of traders of flowers and plants VGB](#) to find potential trading partners.

Ornithogalum is mostly used as a bouquet filler. Competition with other fillers determines prices and demand. The future market for bouquet fillers in the UK is expected to remain stable. Prices of Ornithogalum at the Dutch auction are usually quite stable. As a bouquet filler Ornithogalum is a low priced flower.

There is no export of Ornithogalum from the UK to other countries.

#### Tip:

- Experience is essential to be successful in direct trade in the UK market. A newcomer to the UK market might consider joining up with more experienced, fellow exporters.

## Production

There is no data available on UK production of Ornithogalum.

## Analysis and interpretation

Ornithogalum is mostly imported to the UK, although it is also a small and a typical seasonal product supplied by Dutch growers. These Dutch growers mostly grow special colours or varieties. Most Ornithogalum sold in the market are either of the *O. saundersiae*, *O. thyrsoides*, or *O. dubium* varieties.

### Tip:

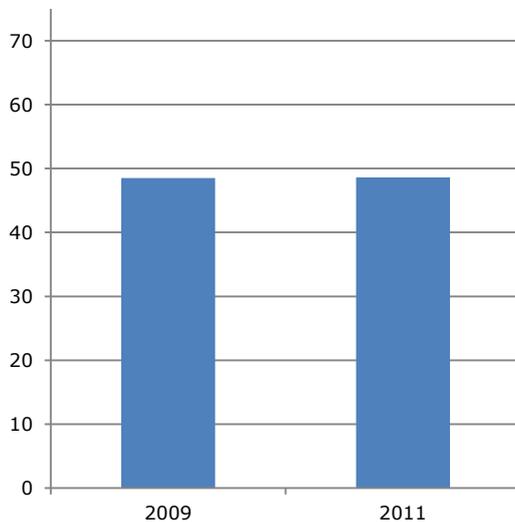
- Summer flowers for bouquets are imported and redistributed mainly by specialised importers. Find a specialised importer to get the best value by reaching special market channels and demand

Due to the expanding supply, first from Israel and later also from Africa, Ornithogalum is increasingly becoming a mainstream product, which is available year-round.

Production of Ornithogalum in the UK is negligible. Ornithogalum is produced in countries like Israel, Kenya and South Africa. Israel mainly supplies from January to Mother's Day (March or April). Kenya is a year-round supplier, with a small peak in March/April and a dip in June/July. Ornithogalum in Kenya is produced by small and medium size farmers who often bundle their products for joint auction by a specialised exporting firm.

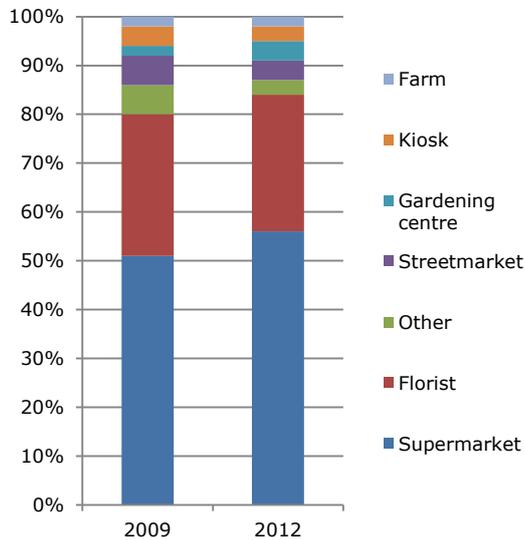
## Consumption

Figure 3: Consumption of cut flowers in the UK, in € per capita



Source: *Productschap Tuinbouw, 2012.*

**Figure 4: Share of UK sales channels for cut flowers in % (Q3)**



Source: Productschap Tuinbouw, 2012.

### Analysis and interpretation

There are no statistics available about sales volumes or consumer spending of Ornithogalum in the UK. However, there are statistics on the consumption of cut flowers in general, which show that consumption of flowers per capita was fairly stable between 2009 and 2011. The market for bouquets in the UK is expected to remain stable in the coming years.

#### Tips:

- The majority of UK consumers buy flowers in the supermarket. In order to supply this channel make sure to comply with the specific requirements set by every supermarket retailer.
- Ornithogalum is often used as a bouquet filler. This makes the UK market of special interest, as half of all flowers in the UK are sold in bouquets. Reach out to specialised importers and bouquet producers, or explore the potential of assembling bouquets in the country of origin and exporting bouquets. Be aware of the difficulties of maintaining quality when exporting bouquets.

British consumers buy their flowers in supermarkets (55%) and florist shops (28%). The shares of the various sales channels are fairly stable and are expected to remain stable for the foreseeable future. The supermarket channel, including [Tesco](#), [ASDA](#), [Sainsbury's](#), [Marks & Spencer](#), [Waitrose](#) and [Coop](#), is very dominant in the UK and its share is higher compared to other European countries.

Ornithogalum is often used by florists. They appreciate Ornithogalum because of its decorative features and its longevity. They use Ornithogalum in mixed bouquets and in flower arrangements.

Peak days remain very important in the UK. Mother's Day is of particular importance. This is held on the fourth Sunday of Lent. It is exactly three weeks before Easter Sunday and usually falls in the second half of March or the beginning of April.

#### Tips:

- If you want to focus on a peak day, take these dates into account when drawing up your annual production schedule.

### Market trends

[CBI Trendmapping](#) provides you with general trends in the European market for cut flowers. This section provides more details about specific trends in the market for fresh cut Ornithogalum.

## Analysis and interpretation

### Social & Quality:

- Consumers in the UK demand high quality flowers with a 7-day guarantee.
- Consumers and retailers in the UK pay attention to social issues, like labour conditions. Therefore certification schemes play an important role in the UK market.

### Tips:

- Become certified and comply with the specific requirements set by the (supermarket) retailer. Supermarkets often take regular standards such as MPS-A and GlobalG.A.P. as a basis for developing their own stricter standards. Do not simply acquire the labels, but genuinely introduce sustainability and all its aspects in your business philosophy.
- Costs are important, but buyers also take the quality of your logistics into account.
- Work on your cold chain in order to optimise product quality.
- For more information about environmentally-friendly flowers and working conditions, check websites such as [MPS](#) and [Fair Flowers Fair Plants](#).

### Economic:

- The economic crisis has had its impact on business relations in the flower sector. The relationships between parties have hardened and payments by retailers are often postponed.
- Due to the crisis, bouquets are increasingly produced locally, reducing costs.

### Environmental:

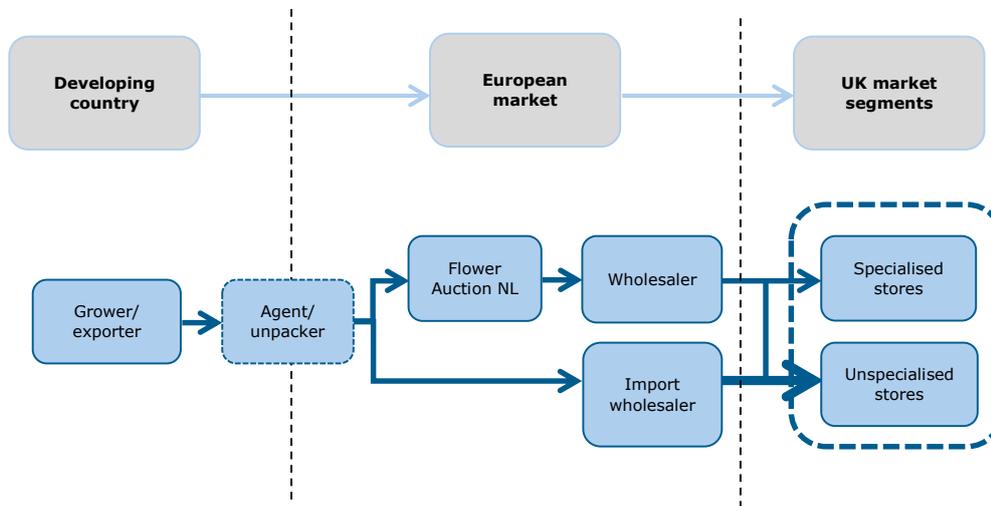
- Consumers in the UK are frontrunners when it comes to flowers grown in an environmentally-friendly manner. UK supermarkets in particular have played an important role in introducing additional requirements. Important aspects include MRLs, labour conditions at farm level and greenhouse emissions during production and transport.
- As a result, 60-70% of the flowers sold via the supermarket channel are Fairtrade. This continues to be the focus of many supermarkets.
- All major UK retailers, such as [Tesco](#), [ASDA](#), [Sainsbury's](#), [Marks & Spencer](#), [Waitrose](#) and [Coop](#), have their own private labels for sustainable products (e.g. Tesco Nature's Choice). In many cases, these unilateral retailer codes are based on one or a combination of industry standards.

## Market channels and segments

For more general information about market channels and segments you can have a look at the [Market Channels and Segments](#) section available on the CBI market intelligence platform. This section provides some information about the various marketing channels through which cut flowers are marketed in Europe.

The Netherlands is the centre of European flower trade. The cut flower market can be divided into two market segments: specialised and unspecialised. The first encompasses all the specialised florists in which flowers are the primary product and the latter includes unspecialised shops that sell flowers as an addition to the regular range. In the UK the position of the large retailers is dominant and many flowers are traded directly in the unspecialised market segment.

**Figure 5: Market channels for fresh cut flowers to the UK market**



### Analysis and interpretation

The Netherlands is at the centre of the European flower trade, and direct imports of Ornithogalum to the UK from DCs have remained limited. Ornithogalum is often produced by smallholders that are not able to supply a constant quantity and quality to the demanding British retailers. Ornithogalum is often sold to florists and bouquet assemblers that use them for bouquets and arrangements.

#### Tip:

- Trading directly as a DC supplier with the UK market is difficult since additional requirements are set with respect to quantity, quality and production. These often exceed legal and auction requirements. Use the extensive network and experience of the Dutch wholesale traders. The Dutch flower auction is a reliable trade platform that offers extensive services that help to enter the market.

Ornithogalum is sold in both the specialised and unspecialised segments. In general, there is a wide quality assortment available in the British supermarkets. Some supermarkets even have quality bridal bouquets. Supermarkets like Tesco, ASDA, Sainsbury's, Marks & Spencer and Coop are expected to increase the use of tendering to find and appoint preferred suppliers, reducing the importance of wholesale traders.

#### Tips:

- Focus has become the key word in the flower trade. More and more wholesale traders are specialising in one of the two main market segments. Find out your wholesale trader's primary market segment. Choose the wholesale trader that fits your company structure and production process best. Try, together with the wholesaler, to meet product and packaging requirements for that specific segment.
- Agents provide certain services like unpacking before redistribution to the auction or other buyers. When looking for a reliable agent, it is important to inquire in your network of other exporters, buyers, or ask your contact person at the auction.

Some supermarkets – like [Waitrose](#) – favour UK grown flowers over imported flowers.

#### Tip:

- Without prior experience and knowledge of exporting directly to the UK market, the direct channel is a difficult channel. Exporting through the Dutch auction is recommended.

## Market competitiveness

For general information about market competitiveness for cut flowers you can have a look at the Market Competitiveness information available on the CBI market intelligence platform. This section provides information about the market competitiveness of the UK market with respect to cut Ornithogalum.

## Analysis and interpretation

**Buyer power:** The supermarket sales channel is dominated by a limited number of larger players and as a result these large retailers have a high degree of buyer power vis a vis wholesale traders and producers.

### Tip:

- The UK market may be entered via the Dutch flower auction. At a later stage, if quality and quantity requirements can be met, flowers can be sold in the unspecialised market channel by supplying supermarket retailers directly.

**Degree of rivalry:** Ornithogalum is mainly used in bouquets. In the summer there is some rivalry from the Netherlands, where mainly special (non-white) colours are grown. Rivalry comes mainly from other bouquet fillers such as Hypericum and Gypsophila.

### Tips:

- Try not to compete on price alone, but build sustainable partnerships with buyers and strive for excellent product quality.
- Buyers expect proactive communication from their suppliers.

**Threat of new entrants:** To supply the EU market, producers require, among other things, a considerable investment and access to advanced knowledge about growing quality flowers. It is therefore difficult for inexperienced producers to enter the market. This lowers the threat of new entrants.

### Tip:

- Again, being part of a stable partnership and being a trustworthy supplier can help you establish and maintain your position on the market. Establish a credible track record including transparent information on your company and product quality.

**Substitute products:** In the UK there are some initiatives to produce flowers for the local market to replace flowers produced abroad. This trend is partially motivated by increasing attention being paid to sustainability and the carbon footprint of trade and consumption.

### Tip:

- Consider the importance of sustainability issues and communicate what you do. Obtain relevant certification such as GlobalG.A.P., Fairtrade etc. Contact your importer or client about what is required.

## Useful Sources

### Export and market entry support:

- CBI - <http://www.cbi.eu>
- CBI Information about EU Buyer Requirements - [http://www.cbi.eu/marketintel\\_platform/cut-flowers-and-foilage-177508/buyerrequirements](http://www.cbi.eu/marketintel_platform/cut-flowers-and-foilage-177508/buyerrequirements)
- DEFRA Procedure for Electronic Application for Certificates from the Horticultural Marketing Inspectorate - <http://ehmipeach.defra.gov.uk>
- EFSA - <http://www.efsa.europa.eu/en/>
- EU Market Access Export Helpdesk - [http://exporthelp.europa.eu/thdapp/index\\_en.html](http://exporthelp.europa.eu/thdapp/index_en.html)
- 

### Certification schemes:

- Ethical Trading Initiative - <http://www.ethicaltrade.org>
- Fair Flowers Fair Plants - <http://www.fairflowersfairplants.com/home-en.aspx>
- Fairtrade - <http://www.fairtrade.net>
- GLOBALG.A.P. - [http://www.globalgap.org/uk\\_en/](http://www.globalgap.org/uk_en/)
- ISEAL Alliance - <http://www.isealalliance.org>
- ITC Standards Map - <http://www.standardsmap.org>
- MPS - <http://www.my-mps.com/en/>

**Marketing and trade standards:**

- EU legislation on Organic Production - [http://ec.europa.eu/agriculture/organic/eu-policy/legislation\\_en](http://ec.europa.eu/agriculture/organic/eu-policy/legislation_en)
- UNECE Standards for Cut flowers - [http://www.unece.org/trade/agr/standard/flowers/flower\\_e.html](http://www.unece.org/trade/agr/standard/flowers/flower_e.html)
- VBN Dutch Flower Auctions Association - <http://www.vbn.nl>

**Statistics and sector information:**

- AIPH - <http://www.aiph.org>
- Eurostat - <http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home/>
- ITC Trade Map - <http://www.trademap.org>
- UN Comtrade - <http://comtrade.un.org>



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