## CBI MARKET SURVEY

# THE PLANTS AND YOUNG PLANT MATERIAL MARKET IN THE NETHERLANDS

**Publication date: September 2006**

**Report summary**
This CBI market survey discusses, amongst others, the following highlights for the plants and young plant material market in The Netherlands:

- The market for plants and young plant material in The Netherlands ranks fifth in the EU. It is a stable, saturated market. The production of plants continued to increase between 2004 and 2005, registering a 6% growth. Company scales continued to increase. Growers are increasingly organising themselves in growers' associations and developing concepts.
- Imports to The Netherlands increased by 37% between 2001 and 2005. Developing countries traditionally have a strong position in the Netherlands import market for cuttings. Imports of cuttings from developing countries continue to grow. A large part of these imports is re-exported.
- Netherlands growers are Increasingly looking for possibilities to lower their production costs. An important way is by lowering the costs of young plant material. Subsequently, more and more young plant material is imported from countries with lower labour and land costs.

This survey provides exporters of plants and young plant material with sector-specific market information related to gaining access to The Netherlands. By focusing on a specific country, this survey provides additional information, complementary to the more general information and data provided in the CBI market survey 'The plants and young plant material market in the EU', which covers the EU in general. That survey also contains an overview and explanation of the selected products dealt with, some general remarks on the statistics used as well as information on other available documents for this sector. It can be downloaded from http://www.cbi.nl/marketinfo.

## 1. Market description: consumption and production

### Consumption

#### *Total market size*
The market for plants and young plant material in The Netherlands ranks fifth in the EU amounting to € 530 million in 2005. Since 1999, the size of the market has always been between € 503 million and € 551 million without developing in a clear direction. This indicates saturation of the market. The last forecast of the Flower Council of Holland is a decrease of consumption to € 477 million in 2009. However, this forecast was based on figures until 2004. The increase in consumption in 2005 will lead to a positive change in this forecast.

#### *Product groups*
The share of flowering plants in total expenditure on indoor plants in The Netherlands increased from 55% to 59% in 2005. According to a Flower Council of Holland report in 2003, the best known plant is the Ficus, a foliage plant. This indicates a high level of penetration of the Ficus in the market.

The Netherlands is also a major market for young plant material, as the demand for this material is directly related to the EU demand for finished plants from The Netherlands.

### *Market segmentation*

The following market segmentation was identified in the market for finished plants:

- A division can be made between plants for houses and plants for institutions and companies. About 77% of the total supply of finished plants is distributed to the consumer market and 23% to the institutional market. In general, the latter has a higher demand for large-sized plants.
- As in most EU countries, elderly people generally buy more plants than younger people. They care more for plants than younger people, as they often spend more time at home and have more time to take care of their plants.

**Table 1.1 Share of people purchasing plants in 2005, in %**

| Age group | 12 - 19 | 20 - 29 | 30 - 39 | 40 - 49 | 50 - 64 | 65+ | Total |
|---|---|---|---|---|---|---|---|
| Share | 3 | 19 | 25 | 28 | 39 | 48 | 29 |

Source: Flower Council of Holland (2006)

- It is more common amongst women to purchase flowers and plants than it is amongst men. 60% of the women purchased flowers or plants in 2005 while only 36% of the men did this.
- Commercial service companies and wholesalers were the major buyers in the institutional market segment in 2003. Expenses incurred by companies in the non-profit sector decreased by half since 2000.
- The market segment for outdoor plants can be divided further into 6 groups of consumers. A group of garden lovers (21%), proud garden owners (20%), prestigious perfectionists (18%), social people preferring the outdoor life (17%), stubborn garden owners (14%) and garden conformists (10%).

### *Trends in consumption*

- Consumer expenditure on plants decreased by 4 and 5% in 2003 and 2004 respectively. The number of plants per purchasing household decreased from 7.9 to 7.3 in the same period. In 2005, however, the average amount spent on plants per capita increased from € 23.40 to € 24.00.
- The most important reason to buy indoor plants is for personal use. Plants are often used to decorate the home. Notably, foliage plants are considered as improvements to the living environment.
- The market share of plants bought for personal use, increased from 54% in 1992 to 69% in 2006.
- The market share of plants bought to give away as presents decreased from 46% in 1992 to 31% in 2006.
- In 2005, companies and institutions spent about € 139 million on plants. Until 2003, this market segment had been increasing in size for over 10 years. In 2003, companies and institutions spent 1% less on plants compared to the previous year and in 2004 they spent 16% less on plants. In 2005, the market value increased again by 14%.
- About 66% of companies and institutions stated that the major reason for purchasing plants is for cosiness.
- Between 1992 and 2003, the percentage of companies and institutions which bought flowers and plants decreased from 88% to 81%. Flowering plants sustained the largest decrease as they are seen as more time-consuming than foliage plants.
- There are two contrasting trends visible in the garden segment. On one side, consumers have renewed interest in romance, flowers, sweet colours and refined patterns. On the other side there is also more interest in sharp contrasts, black and white and roughness and toughness.

### Production

The production of plants continued to increase between 2004 and 2005, registering a 6% growth. The value of the plant production amounted to € 1,512 million in 2005. The area for the production under glass has increased by 40 since 1990, while the number of growers decreased by 31%. This resulted in an increase of company scale from 0.56 hectares to 1.14

hectares for the average grower under glass. Production in the open experienced the same long-term development. Moreover, the increase in production value and the decrease in production area indicate higher efficiencies or higher product prices. There are no indications for significant changes in these positive developments for the plant production in the Netherlands.

One more characteristic of production in The Netherlands is the extremely wide assortment of plants. Because of the fierce competition in the European market and particularly in The Netherlands, Netherlands growers need to distinguish themselves. Netherlands' growers, therefore, supply an abundance of products and varieties, with all kinds of added value items attached to it.

**Table 1.2 Netherlands production area and company size, 2001-2003, ha.**

| | 2001 | 2003 | 2005 |
|---|---|---|---|
| Total area under glass | 1,283 | 1,313 | 1,377 |
| Average company size | 0.91 | 1.02 | 1.14 |
| | | | |
| Total area outside* | 2,221 | 2,471 | 2,435 |
| Average company size | n.a. | n.a. | 1.09 |

Source: Flower Council of Holland, 2006.
*Including area for cut flowers

### Major Players

In 2005, there were 1,212 growers of finished plants active in The Netherlands (Source: CBS Landbouwstatistiek, 2006). While the number of growers is decreasing, the average size per company increases by the same rate. Examples of leading growers in The Netherlands are:

- Bunnik Plants: http://www.bunnikplants.nl
- Sjaloom: http://www.sjaloomgrowers.nl
- VDE Plant: http://www.vdeplant.nl
- Hedera Plant: http://www.hederaplant.nl
- Nolina: http://www.nolina.nl

### *Trends in production*

More and more Dutch pot plant growers organise themselves into growers' associations (in Dutch 'telersvereniging'). Examples of this kind of growers' associations are:

- Group Unique: http://www.group-unique.com
- FicusForever: http://www.ficusforever.nl
- Decorum Plants: http://www.decorum-plants.nl
- Comfort-Plant: http://www.comfort-plant.nl

Growers are increasingly active in concept development. In cooperation with large retailers, they try to develop concepts in order to offer more than just plain products and to remain competitive. Another development relating to the more intensive cooperation between growers and retailers is the increasing demand by retailers for packing and delivery on demand. Growers supplying retailers directly are expected to substitute for the chains which have been eliminated in the distribution chain. Strong links between growers and retailers facilitate the adjustment of products and services offered by growers to satisfy the high demands of the retailers.

Netherlands growers are increasingly looking for possibilities to lower their production costs. An important way is by lowering the costs of young plant material. Subsequently, more and more young plant material is imported from countries with lower labour and land costs (see CBI market survey covering the EU market).

### Opportunities and threats

- After a short period of decreasing plant sales, the Netherlands market for plants is picking up again. This confirms the often-made assumption that plant sales are strongly related to

macro economic developments. It is positive news for almost all companies in the plant market.
- The increasing popularity of flowering plants is a disadvantage for producers in developing countries, who are mainly supplying cuttings and foliage plants. The barriers to the export of flowering plants over large distances are structural.
- Providing packing and delivery on demand enhances opportunities for producers trying to supply directly to retailers.
- Young plant material is increasingly imported from countries with lower labour and land costs.

**Useful sources**
- Flower Council of Holland: http://www.flowercouncil.org
- Netherlands Horticultural Commodity Board: http://www.tuinbouw.nl
- Please refer to Section 6 for a list of trade magazines.

## 2. Trade: imports and exports

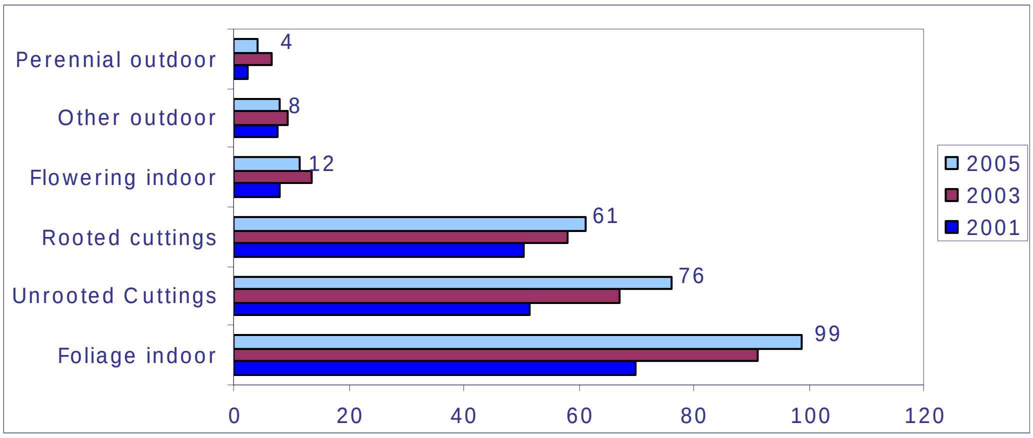
### Imports

***Total imports***

The Netherlands plays a leading role in the international trade in plants. It is characterised by a strong production industry, the auction marketing system that brings together both local and international supply, and a strong export trade sector. The Netherlands is the fourth largest importer in the EU. Imports into the Netherlands increased by 37% between 2001 and 2005 amounting to € 260 million in the latter year.

***Imports by product group***

**Figure 2.1 Netherlands imports of plants and young plant material, 2001-2005, € million**




Source: Eurostat (2006)

In the period reviewed, imports of all three major product groups experienced growth. The imports of cuttings are relatively more important in The Netherlands than in other EU member countries, accounting for more than half of total imports in 2005.

**Table 2.1 Leading suppliers of plants and young plant material to The Netherlands (share in imported value, 2005)**

| **Product** | **2001** € thousand | **2005** € thousand | | **Leading suppliers in 2005** (share in %) | **Share in Netherlands imports** |
|---|---|---|---|---|---|
| Unrooted | 51,628 | 76,028 | Intra-EU: | Spain (3%), Belgium (2%), Germany | 7% |

| Product | 2001 € thousand | 2005 € thousand | | Leading suppliers in 2005 (share in %) | Share in Netherlands imports |
|---|---|---|---|---|---|
| cuttings | | | | (1%) | |
| | | | Extra EU excl DC*: | Israel (6%) | 8% |
| | | | DC*: | China (19%), Kenya (19%), Uganda (13%), Tanzania (9%), South-Africa (7%), Brazil (7%) | 85% |
| Rooted cuttings | 50,535 | 61,222 | Intra-EU: | Germany (10%), Belgium (8%), Italy (5%) | 29% |
| | | | Extra EU excl DC*: | Israel (4%), Taiwan (1%), Bulgaria (1%) | 7% |
| | | | DC*: | Costa Rica (30%), Guatemala (9%), Honduras (6%), Macedonia (3%), Sri Lanka (3%), China (2%) | 64% |
| Perennial plants | 2,427 | 4,269 | Intra-EU: | Germany (43%), Italy (21%), Belgium (21%) | 97% |
| | | | | | |
| | | | Extra EU excl DC*: | | 1% |
| | | | DC*: | China (1%) | 2% |
| Other outdoor plants | 7,573 | 8,105 | Intra-EU: | Germany (41%), Belgium (24%), Italy (15%) | 88% |
| | | | Extra EU excl DC*: | New Zealand (1%), Israel (1%) | 2% |
| | | | DC*: | Kenya (8%), China (1%), Turkey (1%) | 10% |
| Flowering plants | 8,008 | 11,617 | Intra-EU: | Germany (35%), Belgium (24%), Denmark (22%) | 99% |
| | | | Extra EU excl DC*: | | 0% |
| | | | DC*: | | 0% |
| Foliage plants | 69,992 | 98,641 | Intra-EU: | Belgium (26%), Germany (25%), Spain (7%) | 72% |
| | | | Extra EU excl DC*: | South-Korea (1%), USA (1%) | 3% |
| | | | DC*: | China (12%), Guatemala (4%), Malaysia (2%), Costa Rica (2%), Honduras (1%), Thailand (1%) | 25% |
| **Plants and young plant material** | 190,163 | 259,883 | Intra-EU: | Germany (16%), Belgium (15%), Italy (6%) | 45% |
| | | | Extra EU excl DC*: | Israel (3%) | 5% |
| | | | DC*: | China (11%), Costa Rica (9%), Kenya (6%), Uganda (4%), Guatemala (4%), South-Africa (3%) | 40% |

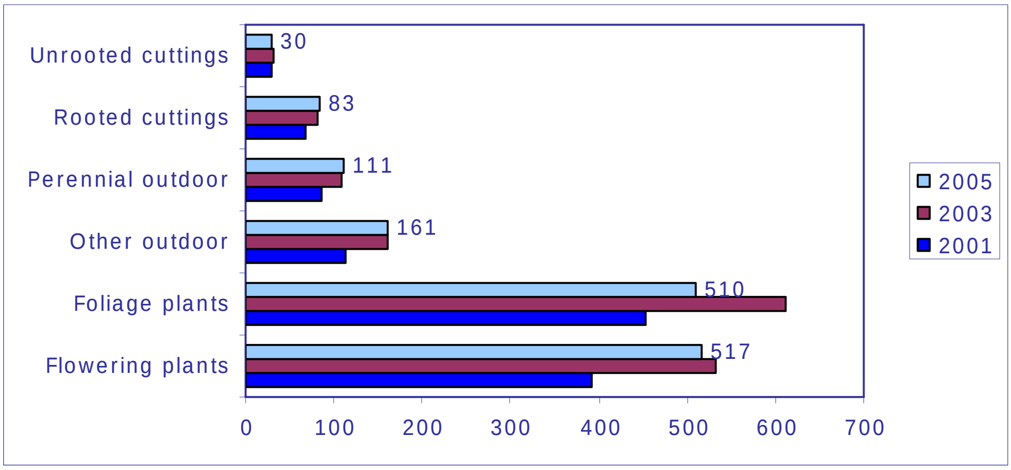
Source: Eurostat (2006)
*DCs: Developing countries

The leading suppliers to The Netherlands were Germany (16%) and Belgium (15%). The third largest source was China, supplying 11% of the total Netherlands imports of plants and young plant material. China is the leading supplier of unrooted cuttings and is also an important supplier of foliage plants. The share of imports from Costa Rica decreased from 12% of total imports to 9%.

Developing countries traditionally have a strong position in the Netherlands import market for cuttings, accounting for 76% of total cuttings imports. Imports of cuttings from developing countries continued to grow, reaching almost € 104 million in 2005, an increase of 16% compared to 2003. A large part of these products is re-exported to other EU countries. There is quite a large number of Netherlands breeders who have set up their own propagation facilities all over the world or work closely together with local companies. Furthermore, a number of Netherlands importers functions as suppliers of young plant material to Belgian, German and Danish nurseries. Nevertheless, most of the young plant material imported from developing countries is used by Netherlands nurseries to grow finished plants.

**Exports**
In 2005, The Netherlands was, by far, the leading exporter of plants and young plant material, accounting for 58% of the total exported value by EU member countries. The total value of exports amounted to € 1,412 million and the volume to 707 thousand tonnes. This was realised by 1,082 exporters registered at the HBAG, the Netherlands agricultural trade organisation. Netherlands exports of plants and young plant material showed more or less the same pattern as that of the EU, although The Netherlands' main exported product was finished indoor foliage plants.

**Figure 2.2 The Netherlands exports of plants and young plant material, 2001-2005, € million**




Source: Eurostat (2006)

Exports decreased by 7.4% between 2003 and 2005. This was mainly due to a strong decrease in exports of foliage plants.

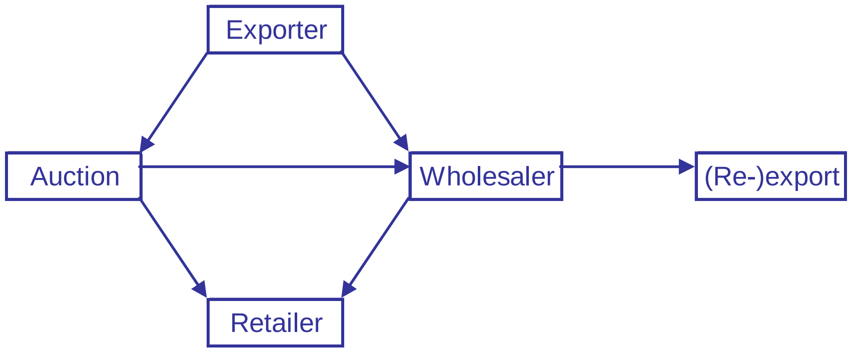
**Opportunities and threats**
The leading role of The Netherlands in international trade makes the domestic market very competitive. There are many players active on this market. However, the trading institutions offer many opportunities for developing country suppliers to export their products to the larger market of the EU as a whole.

**Useful sources**
- EU Expanding Exports Helpdesk - http://export-help.cec.eu.int/
  Go to: trade statistics.
- Eurostat – official statistical office of the EU - http://epp.eurostat.cec.eu.int
  Go to: 'themes' on the left side of the home page - 'external trade' - 'data – full view' - 'external trade - detailed data'.

## 3. Trade structure

**Trade channels**

There are two main distribution channels for imported products in The Netherlands: the co-operative auctions and the importing wholesalers. Approximately 36% of the export value of products from foreign suppliers is distributed through auctions, while 64% is sold directly to wholesalers. The share of direct trade is increasing.




***Auctions***

The Netherlands floricultural trade is based strongly on the auction system. The two largest auctions (FloraHolland and Flower Auction Aalsmeer) accounted for about 96% of the total auction sales of plants. In the case of imports of plants, auctions are less important than for cut flowers.

***Wholesale level***

The wholesale trade is being restructured, and a reduction in the number of companies and a concentration of the volume of businesses can be observed. The operators who are making the most progress are the exporters in developing countries who work with the supermarkets.

Most exporters in developing countries sell their products directly to importing wholesalers. In the case of plants, many importing wholesalers are actually wholesale nurseries (or so-called 'handelskwekerijen'). Importing wholesalers, in turn, can sell the imported products also at the auctions or sell them directly to other wholesalers or retailers.

There are different types of wholesalers. There are regular wholesalers, exporters, cash-and-carry centres, 'flying Dutchmen', box traders and agents. Cash-and-carry centres are wholesalers where customers can pick the products up themselves and pay at the counter. Most of these customers are florists. Their main purchasing channels are auctions, agents and growers. The number of cash-and-carry centres decreased in recent years, from approximately 50 in 2002 to 45 in 2005. The so-called 'flying Dutchmen' are wholesalers who deliver direct from their truck to retailers all over Europe. They purchase their products mostly from the auction and growers. According to the VBN (Association of The Netherlands Auctions) there were approximately 346 flying Dutchmen in 2005. A number of them have organised themselves in a foundation (Stichting Lijnrijdersbelangen: http://www.slbrijnsburg.nl).

**Major players**

In The Netherlands, a very large number of companies is active in the pot and garden plant business. Every company has its own specialty. Some are focused on supplying the local market, others on exporting to specific countries or sales channels.

The leading pot and garden plant exporting companies in The Netherlands are listed below:
- Waterdrinker: http://www.waterdrinker.nl/
- Zurel: http://www.zurel.nl/
- OZ Planten: http://www.dfg.nl/designb.php?dex=c335
- Partner Plant: http://www.partnerplant.nl/
- Baardse: http://www.baardse.com/
- Profitplant: http://www.profitplant.nl/
- Blumex: http://www.blumex.com/

Trading growers, so-called 'handelskwekerijen', also play an important role in the Netherlands plant trade. They buy plants or semi-finished plants, use them as input material for their own production of finished plants and later re-sell them.

In the case of young plant material, The Netherlands takes a major position. Many European growers purchase their seeds, bulbs and cuttings from breeders or importers in The Netherlands.

Many leading cut flower breeders and propagators are located in The Netherlands like Deliflor, Fides, Royal van Zanten, Preesman, Florist de Kwakel, Olij Roses, Terra Nigra, just to mention a few. Many pot and garden plant breeders and propagators can also be found in The Netherlands like Corn Bak, Bartels Stek, and Beekenkamp.

Leading European importers of tropical pot plant material are also located in The Netherlands, for instance Cees Reemst, Campo, Las Palmas Aalsmeer, Akker Exotic Plants, Van der Arend Exotic Plants, and Gebr. Reym.

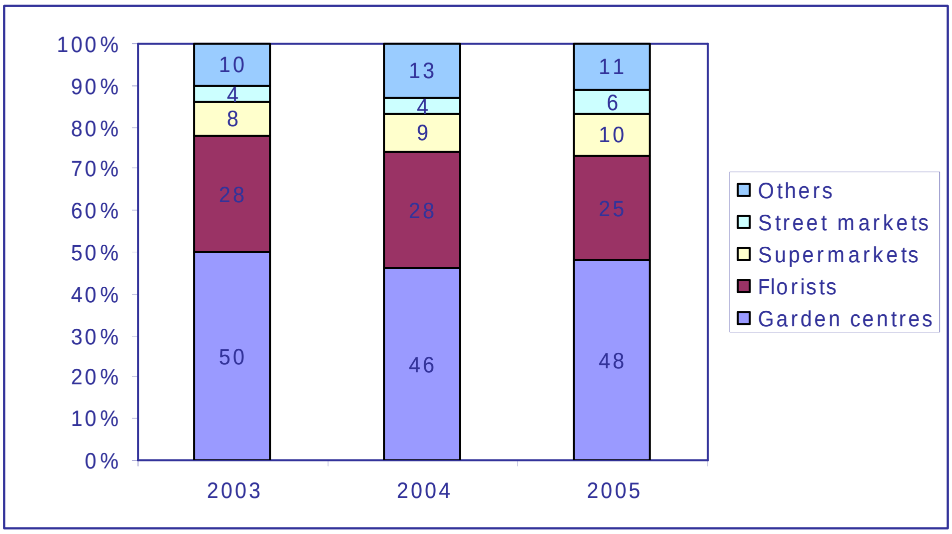
The most important companies active in plant tissue culture are VCI, SBW International, Vitro Plus, Vitrocom, Avo Anthurium Vogels, Könst Alstroemeria, Succulent Tissue Culture, Iribov, Vitro Westland, Agriom and Green Works Productions.

There are several websites listing exporters, trading growers, importers and breeders. These websites are also the best way of obtaining up-to-date hyperlinks to the companies' websites:

- http://www.hortinews.com/websites.php
- http://www.hbagbloemen.nl
- http://www.plantum.nl
- http://www.flowerweb.com

**Retail trade**

**Figure 3.1 The Netherlands market shares at retail level, 2003 - 2005, % of value**




Source: Flower Council of Holland (2006)

For years, garden centres have been the most important sales channel for outdoor and indoor plants. The market share in plant sales on the consumer market, of the approximately 600 garden centres amounted to 48% in 2005. They particularly tailor to consumers, as their market share in the institutional market is relatively small (only 29% in 2003). The importance of garden centres is somewhat stronger for foliage plants than for flowering plants.

- Europatuin: http://www.europatuin.nl/
- Intratuin: http://www.intratuin.nl/
- Tuincentrum Overvecht: http://www.tuincentrumovervecht.nl/
- GroenRijk: http://www.groenrijk.nl/
- Ranzijn tuin & dier: http://www.ranzijn.nl

The number of florists decreased from approximately 3,700 in 2002 to 3,450 in 2005. Moreover, the share of plant sales in their turnover is decreasing slightly and amounted to 22% in 2005. Florists often supply both the consumer and the institutional market. Consumers account for 74% of turnovers made by the average florist and, for institutions 26%.

The number of small supermarkets in The Netherlands has decreased considerably, and is expected to fall even more. Large supermarkets are increasing in number. In general, the size of supermarkets is increasing and their share in plant sales is also increasing. This is also due to the fact that the relative number of supermarkets selling plants increased from 60% to 68% between 2001 and 2003.

Supermarkets do not play an important role for institutional market demand. 33% of purchases made by institutions is supplied by florists. The other major suppliers to institutions are garden centres (29%).

### Trends

The market share of supermarkets in plant sales is increasing. The success of the one-stop-shopping concept in the retail market is a major factor behind this development. It also leads to increases in the number of producers supplying directly to supermarkets.

Growers and growers' associations increasingly focus on the marketing side of their business. In the European pot plant trade, just growing the best quality products is often not enough to distinguish yourself from other growers and build a profitable business. In order to offer retailers tailor-made products and services, growers like Bunnik Plants (http://www.bunnikplants.nl) put a lot of effort into developing new products and marketing concepts.

### Useful sources

- Please refer to Section 6 for magazines regarding horticulture in The Netherlands

## 4. Prices and margins

### Prices and margins

The VBN statistical yearbook contains records of average prices paid for the products auctioned during the 3 most recent years. Be aware that prices are averages for all sizes and qualities.

### Useful sources

A few European organisations publish prices for finished plants on a regular basis. ITC in Geneva collects prices at the wholesale level on Netherlands and other EU markets and publishes a weekly bulletin. The main source for information on price developments in The Netherlands are the auctions. The Federation of Dutch Flower Auctions (VBN) publishes sales statistics for the Netherlands auctions. These prices should be seen only as indicative for the products traded in Europe and are an average of the different sizes traded. Finally, the International Association of Horticultural Producers (AIPH) publishes information on prices and trends of plants in their statistical yearbook.

- Federation of Dutch Flower Auctions (VBN): http://www.vbn.nl
- ITC Market News Service (MNS): http://www.intracen.org
- International Association of Horticultural Producers: http://www.aiph.org

## 5. Market access requirements

As a manufacturer in a developing country preparing to access The Netherlands, you should be aware of the market access requirements of your trading partners and The Netherlands' government. Requirements are demanded through legislation and through labels, codes and management systems. These requirements are based on environmental, consumer health and safety and social concerns.

**Legislative requirements**
National legislation in EU countries is compulsory for all products traded within the country concerned. Therefore, as an exporter in a developing country you have to comply with the legislative requirements which are applicable to your products. For information on legislation for plants and young plant material go to 'Search CBI database' at http://www.cbi.nl/marketinfo, select your market sector, and the EU country of your interest in the category search, click on the search button and click on legislative requirements for an overview of all documents on legislation in your country of interest.

**Non-legislative requirements**
Social, environmental and quality-related market requirements are of growing importance in international trade and are often requested by European buyers through labels, codes of conduct and management systems. For information on non-legislative requirements applicable to plants and young plant material, go to 'Search CBI database' at http://www.cbi.nl/marketinfo, select your market sector and the EU country of your interest in the category search, click on the search button and click on your subject of interest under non-legislative requirements for an overview of all documents on the subject concerned in your country of interest.

**Packaging**
Packaging can serve two functions. First, it protects plants from damage during transport. Second, consumer packaging can improve presentation of a product. However, consumer packaging rarely takes place in supplying countries as it often increases volume and subsequently transport costs. Packaging specifications should always be set in consultation with the buyer.

**Tariffs and quota**
For information on import tariffs please refer to the EU survey. The standard VAT rate in The Netherlands is 19% as of February 2006. The VAT rate generally applied to plants is 6%.

## 6. Business practices

For general information on business practices exporters should refer to the EU Survey, CBI's Export Planner and CBI's Image Builder manual.

**Selecting a suitable trading partner**
Finding a trade partner in The Netherlands should not deviate from the general EU method as described in the EU survey. The preferred mode of looking for new suppliers is through trade fairs, through recommendations or sometimes by visiting the country of interest. The most common ways for developing country exporters to approach Netherlands customers are through direct (e)mail, personal visits as follow up, inviting potential Netherlands customers to visit them, building a network and visiting international trade fairs.

After obtaining contacts, evaluating potential trade partners should be done according to criteria such as information quality, geographic coverage, the kind of trade relation the partner is interested in, the position of the partner and the financial status and credibility.

### Coming to terms with your trade partner

As in the rest of Europe, both general and specific offers are common in The Netherlands. Therefore, common practices as detailed in the EU survey apply. When establishing an overseas price for your products, factors involved are: competition; costs such as production, packaging, transportation and handling, promotion and selling expenses; the demand for your product or service and the maximum price which the market is willing to pay. Conformity to market prices depends on the product's novelty. How you price your product is worth a good deal of thought and effort since it directly affects your ability to make a profit.

The most commonly used terms in the plant trade are *open account* and *payment in advance*. Selling on open account carries the greatest risk for the exporter. Sometimes, initial export shipments are partly pre-paid before the products are shipped. In the case of co-operation agreements with overseas companies, payment terms could also include periodical payments.

Export terms of sale which determine costs are covered in the price of the cargo, at which point ownership transfers to the buyer and at which point responsibility for the cargo is transferred. The most commonly used term of sale is FOB (Free on Board), CFR (Cost and Freight) and CIF (Cost, Insurance, Freight). Special attention should also be given to contract fulfilment in reference to contingencies which might occur while the sale order is being processed, shipped etc.

### Cultural differences

A profound knowledge of The Netherlands' business culture is one of the main keys to a durable relationship. In spite of all modern communication tools, the personal relationship with a trading partner often makes or breaks a durable co-operation. The general business culture of people in The Netherlands is described below:

- They are rather informal and are quick to use first names.
- They treat their counterparts as equal and are friendly in their communication.
- They are direct in their approach and they prefer short, clear lines of communication.
- Dutch trading partners expect you to take the initiative in the conversation. They like to ask questions and take a proactive attitude.
- Dutch counterparts are empowered by their organisation to make decisions. There is no need to refer to their bosses; responsibilities are delegated to purchasers.
- They are very task-oriented and do not like irrelevant, extensive social talk; they like to come straight to the point; being very price-conscious, Dutch importers will be quick to ask the price.
- Showing off is frowned upon. 'Act normal' is their way of doing business. Therefore expensive and colourful brochures are often counter productive.
- Dutch purchasers like to work with strict deadlines.

Internet provides many sources on business practices and culture, such as http://www.cba.uni.edu/buscomm/InternationalBusComm/world/europe/netherlands/netherlands.html. Please keep in mind that the above concerns general remarks. Therefore, when conducting business, use you intuition and an understanding attitude.

### Sales promotion

Common practices of trade promotion should not differ much from other European countries. Most inhabitants of The Netherlands speak English (and sometimes French, German and Spanish), especially when they are traders. In general, good care should be taken of existing contacts, by applying prompt, constant and reliable communication. Letters of inquiry should always be replied to. An essential tool used in sales is a detailed and up-to-date customer database.

In the case of plants and young plant material, some importers in The Netherlands are not in favour of trade fairs as a means to promote suppliers from developing countries. However, visiting or even participating in one can be an efficient tool for communicating with prospective customers. It can also be a valuable source of information for you on market developments, production techniques and interesting plant varieties.

Assistance with market entry can also be sought through local business support organisations, import promotion organisations such as CBI and branch organisations focusing on the horticultural sector.

*Trade associations*
- Association of Dutch auctions (VBN): http://www.vbn.nl
- Association of Dutch Wholesalers in floricultural products (VGB): http://www.vgb.nl

*Trade fair organisers*
- International Horti Fair: http://www.hortifair.nl

*Trade press:*
All trade press mentioned below is written in the Netherlands language.
- Agrarisch Dagblad (Magazine with agricultural information): http://www.agrarischdagblad.nl/
- Bloem en Blad (Magazine for professionals in the flowers and plants sector): http://www.bloemenblad.nl/Home.asp
- BloembollenVisie (Magazine for people active in the bulbs and plants sector: http://www.cnb.nl/bloembollenvisie/
- Bloemen en Planten (Magazine for gardeners): http://www.bloemenenplanten.nl/
- Bloemenkrant (Newspaper for professionals in the flower and plants sector: http://www.uitgeverijverhagen.nl/kranten/bloemenkrant
- Bollen nieuws (Website with scientific information regarding plants): http://agro.basf.nl/portal/NL
- Groot Handelsblad (Magazine for traders in plants): http://www.missmag.nl/db/direct/detail1.html?nummer=2248%20Groot%20Handelsblad
- Nieuwe Oogst (Magazine for agricultural producers): http://www.agripers.nl/lezers/wlto.htm
- Tuin & Landschap (Magazine for professional gardeners): http://www.tuinenlandschap.nl
- Vakblad voor de Bloemisterij (Magazine for professionals in the flowers and plants sector: http://www.zibb.nl/tuinbouw/bloemisterij/index.asp

This survey was compiled for CBI by ProFound - Advisers In Development and Mr. Milco Rikken of ProVerde in collaboration with Mr. Jan Lanning.