

Exporting chrysanthemums to the United Kingdom

The United Kingdom (UK) is the largest importer of cut chrysanthemums in Europe. Unlike in other European countries, supermarkets are the main sales channel for cut flowers in the UK. Spray chrysanthemums and Santini are extensively sold as mono-bunches in supermarkets and mixed bouquets. Larger disbud chrysanthemums are popular in mixed bouquets as well. It is expected that the UK market for chrysanthemums from developing countries will grow further in future.

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1. Product description

Chrysanthemums, also called mums or chrysanth, are flowering plants of the genus *Chrysanthemum* in the Asteraceae family. They are native to Japan and China, while Japan is also the largest producer of chrysanthemums in the world (AIPH, 2010). There are many different varieties of chrysanthemums.

The blooms can be daisy-like, decorative as pompons or buttons, or have the form of a spider or anemone. They come in spray, disbud or Santini types.

The most common chrysanthemums are sprays with several flowers per stem. Flower sizes can vary from 4 cm to 12 cm. Disbud chrysanthemums have a single flower per stem. All side shoots are removed, leaving one central stem with a single large flower. Santinis are not larger than 4 cm in diameter and have in the top 5 cm of the stem a number of flowers. The Santini is often used in medium-sized and small bouquets. In addition to the traditional yellow, other colours are available such as white, purple and red.

The HS commodity code for fresh cut chrysanthemums is 06031400 Fresh cut Chrysanthemums and buds, of a kind suitable for bouquets or for ornamental purposes.



Chrysanthemum flowers in growth. Source: Shutterstock

Chrysanthemums are the top-selling cut flower in the world after cut roses. The Dutch flower auction ([Royal FloraHolland](#)) is a major marketplace for buying and selling cut flowers in Europe. The flower auction serves as an important trade platform for both locally grown flowers and exporters from developing countries. Many of the flowers sold on the UK market are traded through the Dutch flower auction.

The flower auction determines [product specifications](#) regarding quality, size, packing and labelling determined by the Dutch Flower Auctions Association ([VBN](#)). The direct market, trade between growers and wholesale traders bypassing the auction, has increased in recent years. However, the main product specifications generally apply to the direct trade market as well.

Search for the specific requirements for your own product in the VBN [product specifications search engine](#). Type “chrysanthemum” to find all existing product specifications for different cultivars or groups of chrysanthemum products. [General product specifications for all chrysanthemums](#) are provided under “Chrysanthemum (grp 10400000)”.

Quality

Chrysanthemums are traded in three quality classes, A1, A2 and B1, depending on the extent to which they meet quality and grading criteria. The minimum quality requirements for chrysanthemums are:

- All flowers should be visually free of living manifestations of the Leaf Miner (*Liriomyza* and *Phytomyza*).
- All chrysanthemums should be 95% free of the Leaf Miner.
- Spray chrysanthemums and Santini should have at least three bloomable buds.
- The maximum diameter of the fully open flower of Santinis is 40 mm.

The minimum maturity for the disbud chrysanthemum is maturity stage 1 (half-opened bud). The minimum maturity for the spray chrysanthemum and Santini is maturity stage 1 (3 half-opened buds).

The following additional requirements apply:

- The lot should be free of growth defects, including irregularly formed disc florets or ray florets and forked branches.
- The lot should be free of heels (in particular the outdoor chrysanthemum).
- The branches in each lot should be visually uniform.
- All chrysanthemums longer than 60 cm should have the bottom 15 cm stripped of leaves (defoliated), with the exception that Santini chrysanthemums shorter than 60 cm should have 10 cm defoliated.
- An additional requirement for Santini states that the branches should have at least six flowers and/or buds.

Fewer buds will result in a slight (in case of four to five buds) or substantial deviation (three buds) from the requirements.

Growers are responsible for grading and for the reliability of the information that they provide with their lot at the flower auction. The auction monitors customers' claims for refunds to check supplier reliability. Such claims may arise from the provision of incorrect product information on the consignment note or labels. The [Quality Index \(QI\)](#) is based on the number of customer refund claims or other complaints over the past eight weeks. Information on your QI is shared with customers and reported back to you.

Chrysanthemums should be sorted according to length, weight and maturity. Separate grading codes exist for disbud and spray chrysanthemum and for Santini. You can find the grading codes and requirements in the [product specifications for chrysanthemums](#).

Packaging

Final retail sales mainly involve mono-bunches and mixed bouquets in either plastic containers or special containers from outlets such as bouquet producers, specialist florist's shops and supermarkets. Bouquets and flowers are sometimes pre-packed in plastic or paper sleeves, but they are mostly assembled and wrapped at the florist's shop.



A chrysanthemum flower box (packing code 519). Source: Royal FloraHolland

Export and import trade is often in cardboard boxes. Flowers are repacked into plastic flower containers (buckets) at the auction in the Netherlands or at the importing wholesaler. [VBN](#) gives detailed information about requirements for packing and loading. There is a difference in requirements between spray chrysanthemums and disbud (single-stem) chrysanthemums, as well as between outdoor and indoor cultivated chrysanthemums.

Spray chrysanthemums from the glasshouse should be supplied in a box (packing code 519) and:

- be supplied in bunches of five stems;
- be packed in a sleeve for each bunch;
- have 80 items per box (120 items per box for light chrysanthemums of 40 g or less).

Spray chrysanthemums from the glasshouse should be supplied at the auction in water in a plastic container (packing code 577) and:

- have a maximum average weight of 40 grams;
- be supplied in bunches of five stems;
- be bundled in bundles of five bunches;
- be packed in a sleeve for each bunch.

Santini should be supplied in water in a container (packing code 544) and:

- be supplied in bunches of four stems;
- be bundled in bundles of five bunches;
- be packed in a sleeve for each bunch;
- optionally be supplied in the small container (packing code 566) for Santini with a length of 50 cm or less.

Disbud chrysanthemums from the glasshouse and from outdoors should be supplied in a box (packing code 519) and:

- be supplied in bunches of ten stems;
- be packed in a sleeve for each bunch.

Disbud chrysanthemums from the glasshouse and from outdoors should be supplied at the auction in a container (packing code 577 or 997) and:

- be supplied in bunches of ten stems;
- be packed in a sleeve for each bunch.

Spray chrysanthemums from outdoors should be supplied in a box (packing code 519) and:

- be supplied in bunches of five stems;
- have 80 items per box (100 or 120 items per box for light chrysanthemums);
- optionally be sleeved, although this is not a requirement.

Spray chrysanthemums from outdoors should be supplied at the auction in water in a container (packing code 577) and:

- be supplied in bunches of five stems;
- optionally be sleeved, although this is not a requirement.

If chrysanthemums are traded in bunches (and not per item), the bunch should have at least five branches and all bunches in the lot should be uniform in volume.

Loading

Optimal loading must be achieved, whereby the volume of the bunches determines the number of supplied bunches per container unit. There must be at least 5 cm of free space between the product and the tray above it in the stacking cart. [VBN](#) gives indications about the number of branches per box depending on the branch weight.

Labelling

When exporting through the Dutch auction, the flowers are often loaded on a stacking cart. This is often done by a specialised import company. Every stacking cart must be accompanied by a fully and correctly completed consignment note containing information about the stacking cart. In addition, every packaging unit needs to be labelled with product and supplier information, namely:

- supplier number;
- variety name;
- amount (e.g. number of stems) per packaging unit;
- grading marks and name of the supplier (recommended).

Additional product labelling will generally take place at the auction/wholesaler or bouquet producer. Despite the fact that an increasing number of growers from developing countries trade directly with wholesale importers in the UK instead of trading through the Dutch auction, the product requirements provided above often apply to the direct market as well. Supplying directly can be more demanding in terms of additional requirements. Retailers often request a continuous supply of flowers over a fixed period. In addition, payment terms differ from the flower auction and can be longer.

Tips:

A good reputation is often rewarded with a higher average price per stem. Always provide the most accurate information with your shipments. Check your [Quality Index](#) regularly and follow up on complaints promptly.

Regularly check the [website of the VBN](#) for updates on the product requirements and ask the auction or your buyer when you are in doubt about specific requirements.

Contact your import agent or your potential client about any additional requirements, if you wish to supply directly to a UK importer/wholesaler instead of supplying to the auction.

2. What makes the UK an interesting market for cut chrysanthemums?

The UK is the most important market for cut chrysanthemums in Europe, especially in terms of imports from developing countries. Almost a quarter of all imports of cut flowers in the UK consists of chrysanthemums. In the UK, supermarkets hold a very high share of the market for cut flowers. Cut chrysanthemums, mostly sprays but also disbud and Santini, are sold extensively as mono-bunches or in mixed bouquets.

Consumption

Chrysanthemums are one of the most popular flowers in the UK. Relatively low prices and a long vase life give chrysanthemums a favourable market position. We estimate that the consumption of cut chrysanthemums in the UK is worth about € 250 million, of which some € 200–€ 220 million is consumed in mono-bunches and the rest in mixed bouquets. The supermarket is the most important retail outlet for flowers in the UK with a market share of about 56% in 2013, followed by florist's with 28%.

Certain holidays and peak days are very important for the sales of chrysanthemums. Mother's Day 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. Chrysanthemums are also popular in November around All Saints' Day when people remember deceased family members, as well as around the Christmas holidays. A peak in the consumption of cut chrysanthemums is observed in March, November and December.

Tips:

The majority of the British consumers buy flowers in the supermarket. In order to supply this channel, make sure that you comply with the requirements set by every supermarket retailer. Contact your importer or your client in order to ask about the specific requirements.

Make sure that you are aware of the [peak days](#) and integrate this aspect in your production planning.

Production

The UK used to have a sizeable cut chrysanthemum production, but the area of cut chrysanthemums in the UK has decreased sharply over the past decades. Recent figures are not available, though it is believed that there are hardly any professional large scale producers left. Although domestic production has declined, the chrysanthemum culture has remained.

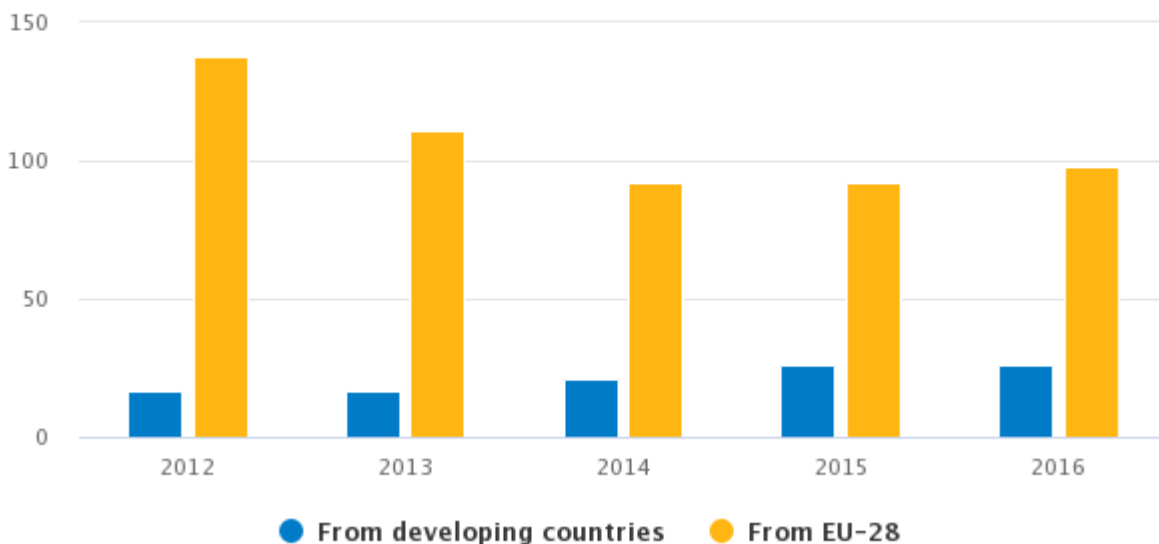
Import

The UK imported a total of € 123 million cut chrysanthemums in 2016. After some years of decline, imports of cut chrysanthemums have increased again after 2014. About 20% is imported from developing countries and the rest from the Netherlands. Despite the strong position of the Netherlands, this situation makes the UK an interesting market for exporters from developing countries. Supermarket chains sell a lot of chrysanthemums and are increasingly sourcing from developing countries.

Colombia and South Africa are the main suppliers from developing countries, while small quantities are reported from Ecuador. Although direct trade is increasing, Dutch traders are still the dominant players on the UK market. Some have import companies in the UK and import directly from developing countries. It is expected that imports from developing countries will increase further, as growers in developing countries are becoming more professional and buyers in the UK are looking for new sources.

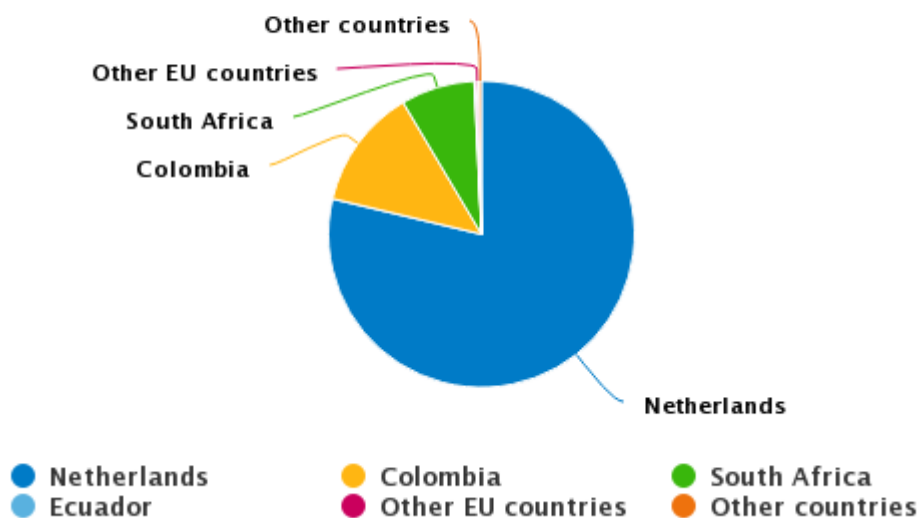
**Figure 1: Import of fresh cut Chrysanthemums in the UK
2012–2016**

in € million



Source: Eurostat Comext, calculations Wageningen Economic Research.

Figure 2: Division of import value of fresh cut chrysanthemums in the UK (intra and extra-EU trade) 2016
in %



Source: Eurostat Comext, calculations Wageningen Economic Research.

Tips:

The Netherlands is the main trade partner of the UK. There are many Dutch traders that have experience in trading chrysanthemums on the UK market. Work with these firms in order to supply the British market.

The Netherlands is home to many world leaders in breeding that are specialised in developing new varieties. Visit the websites of chrysanthemum breeders such as Deliflor, Dekker Chrysanten, Dümme Orange and Royal van Zanten to familiarise yourself with the latest varieties.

Information about UK wholesale traders can be found through the [UK flower wholesale trade association](#).

3. Which trends offer opportunities on the UK market for cut chrysanthemums?

Trends in the European market for cut flowers are described in the document [CBI Trends for cut flowers and foliage](#). Some of the trends that apply specifically to cut chrysanthemums in the UK are a growing share of direct trade from developing countries and a focus on social responsibility certification.

Direct trade is further increasing

An increase in direct trade between producer and exporting wholesale trader, bypassing the flower auction, is very much apparent in the chrysanthemums trade. Especially on the UK market, where supermarkets have a high market share, direct trade is increasing. Wholesale traders set a wide variety of buyer requirements (based on the requirements set by their client), which can deviate from the general auction requirements.

Typically, spray chrysanthemums sold as mono-bunches in supermarkets have a smaller size and particularly value uniformity. Lower-priced chrysanthemums sold at supermarkets will have a shorter vase life than flowers

sold at florist's. However, some UK supermarkets such as Tesco and Waitrose also have an extensive range of higher-priced flowers.

Tip:

For trading on the direct market, there might be additional buyer requirements, especially in the supermarket segment. Contact the wholesaler or supermarket to verify the requirements that you need to fulfil in order to supply to them. Requirements often differ per supermarket.

Increasing demand for socially responsible and sustainably produced flowers

Consumers in the UK are frontrunners regarding environmentally friendly flowers. UK supermarkets have played a particularly important role in introducing requirements for social and environmental standards. 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 have their own private label for sustainable products (e.g. Tesco Nature's Choice). In many cases, these unilateral retailer codes are based on one or more industry standards. Standards are set for suppliers to follow, including social standards most often linked to the [Ethical Trading Initiative](#).

Tips:

Many UK retailers demand social standards such as [MPS-SQ](#) or [ETI](#). Retailers often ask for a variety of certificates. Find out which retailers are asking for which combination of certification schemes and how you can comply.

Compliance with these schemes should not be taken lightly. Audits take place on a frequent basis.

Find more information on sustainability and corporate social responsibility certification schemes at [ITC Standards Map](#) and [CBI Buyer Requirements](#).

4. Which requirements should cut chrysanthemums comply with to be allowed on the UK market?

Which legal and non-legal requirements must my product comply with?

Plant health

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

Cut chrysanthemums imported in the EU must be accompanied by an official “phytosanitary certificate” guaranteeing the phytosanitary conditions of plants and plants products. It also ensures 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 obtain the phytosanitary certificate.

A model phytosanitary certificate can be found in [Annex VII](#) of the Plant Health Directive.

Check whether your country and the country that you want to export to have implemented digital services in order to facilitate the import and export process. For example, the Netherlands has 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.

Intellectual Property Rights (IPR)

Developing new varieties is often very expensive. The developers of new varieties want a return on their investments. To prevent just anybody from using these new varieties, they are protected by intellectual property rights. In recent years, there has been an increasing focus on 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 the necessary royalties.

An interesting trend is that breeders only allow their new variety to be grown by a select group of growers. Staying in contact with breeders and offering perfect conditions for growing their new variety may therefore be an advantage.

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).

Full overview of requirements for cut flowers

For a list of requirements for cut chrysanthemums, consult the [EU Export Helpdesk](#), where you can select your specific product under Chapter 06031400.

5. Which additional requirements do buyers often have?

CSR - Corporate Social Responsibility

UK consumers are paying more and more attention to social and environmental circumstances during the production of cut flowers. As a result, EU buyers require you to meet certain environmental and social standards in the form of certification for B2B schemes and consumer labels. Compliance with environmental standards (focusing on good agriculture practices, pesticide use and water use) is not yet a mandatory requirement for cut chrysanthemums, but the demand from buyers is increasing.

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 future. Becoming certified is essential.

Use your good practices and certification as a marketing tool when communicating 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 that you are targeting will probably be decisive (which country do you want to export to and which trade channels do you use?).

The most important B2B schemes for cut chrysanthemums is MPS, which offers several standards. [MPS-ABC](#) certification covers environmental performance and is considered a must for growers. Other schemes include MPS-SQ (focusing on social issues), MPS-GAP (on Good Agricultural Practices) and MPS-Quality. The most comprehensive standard is MPS-Florimark, which is a combination of the aforementioned four schemes.

Tips:

Consult [Channels and Segments](#) to see how market channels are changing.

[MPS](#) gives an overview of all MPS schemes, including links to the criteria per scheme.

Compare requirements of different certification schemes by consulting the [ITC Standards Map](#).

GLOBALG.A.P.

[GLOBALG.A.P.](#) is a B2B scheme originally focusing on Good Agricultural Practices. GLOBALG.A.P. has been the most important scheme for fruit and vegetables for years, but it is gaining importance for cut flowers as well, especially with regard to sales to supermarkets. Several other standards are benchmarked against GLOBALG.A.P.

Tips:

[GLOBALG.A.P.](#) gives an overview of all the standards for flowers and ornamentals.

Check for existing sustainability certification initiatives within your country in the [ITC Standards Map](#). Examples are the Colombian [Florverde](#) standards or the code of the [Kenyan Flower Council](#). Sometimes, these local initiatives are benchmarked against GLOBALG.A.P.

Private labels

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

Furthermore, importers may also participate in initiatives such as the [Ethical Trading Initiative](#) (ETI) in the United Kingdom 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 performing 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. Therefore, European 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 the developments.

6. What are the requirements for niche markets?

Organic

The market for organic flowers is still small. Organic flowers must be produced and processed by natural methods defined in [EU legislation](#). It is expected, however, that the market for organic flowers – including organic chrysanthemums as part of organic flower bouquets – will increase in future.

Tip:

Growing organic cut chrysanthemums could represent an opportunity in future.

7. What competition do you face on the UK market for cut chrysanthemums?

The UK retail market for cut chrysanthemums is dominated by a number of large supermarket chains. As the number of supermarket buying organisations is limited, they have considerable buyer power vis-à-vis producers and wholesale traders. The supermarkets mainly work with a limited number of dedicated suppliers (wholesalers) and usually have strict standards with respect to quality and social standards.

The market is further dominated by Dutch growers. These Dutch growers have a lot of experience and know-how about growing chrysanthemums, while Dutch wholesalers are very active on the UK market. Although the direct trade of cut chrysanthemums from Colombia and South Africa has increased, it is expected that the

dominant position of the Dutch growers and traders will remain.

Tips:

Try not to compete on price alone, but build sustainable partnerships with buyers and strive for excellent product quality.

Work on a sustainable partnership with your buyers. Visit your buyers or meet them at trade fairs such as IPM in Essen (Germany), IFTF in Vijfhuizen or IFTEX in Kenya to build trust and commitment. Monitor your buyers' satisfaction, and always be honest and direct in case of supply problems or questions.

Being a trustworthy supplier can help you to establish and maintain your position on the market. Establish a credible track record including transparent information about your company and product quality.

See our study of [Competition in the European market for cut flowers and foliage](#) for more information.

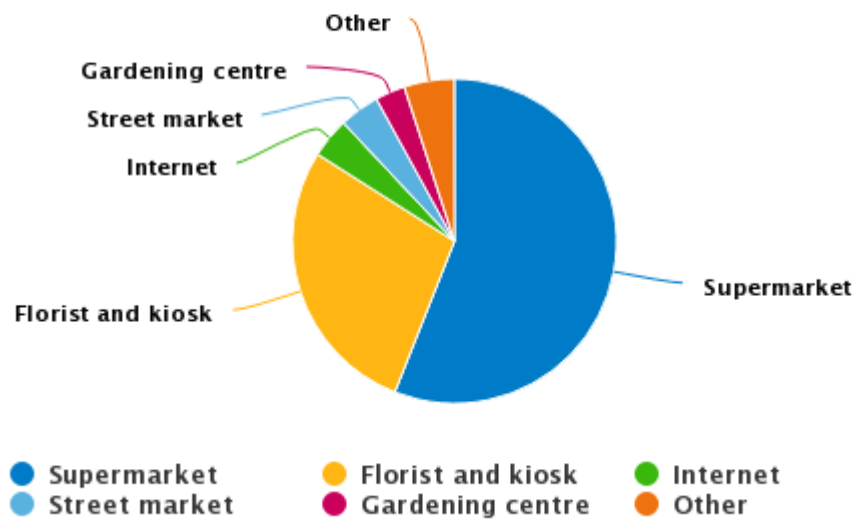
8. Through which channels can you get cut chrysanthemums on the UK market?

The trade channels and market segments for cut chrysanthemums do not differ much from those for most other cut flowers. Further information on trade channels and market segments can be found in [Trade channels and market segments for cut flowers and foliage](#).

British consumers buy their flowers in supermarkets (56%) and florist's shops (28%). The shares of the various sales channels remained fairly stable between 2009 and 2013, with the supermarket share being higher than in other European countries. On the one hand, there has been an increase in low-cost promotion bouquets sold in the supermarkets (for as little as £ 2); on the other hand, some supermarkets are selling broader assortments of higher-priced flowers as well.

Figure 3: Market share for cut flowers per sales channel in the UK 2013

in % of expenditures



Source: Royal FloraHolland / forecast Bureau sierteelt.nl.

Tips:

Trading directly with the UK market is difficult, since additional requirements are set with respect to quantity, quality and production which often exceed legal and auction requirements. If you are relatively inexperienced as an exporter, supplying to the Dutch flower auction is a good way to start exporting. The Dutch flower auction is a reliable trade platform that offers extensive services to help you enter the market.

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.

Agents provide certain services such as unpacking before redistribution to the auction or to other buyers. When looking for a reliable agent, it is important to inquire within your network of other exporters and buyers or to ask your contact person at the auction.

9. What are the end-market prices for cut chrysanthemums?

In the supermarket, a small bunch of ten spray chrysanthemums or Santini of various colours costs about £ 4 (€ 5). At the florist's, a bunch of larger spray chrysanthemums costs about € 10. Chrysanthemums are commonly incorporated in mixed bouquets, for which the cost of a single chrysanthemum stem can vary between € 0.50 and € 3, depending on the size and variety. The share that exporters receive is usually about 20% of the end-market consumer price.

Figure 6: Price breakdown

Export

Shipping

Import/Wholesale/auction

Retail



+20%



+15%



+20%



+45%

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