

Exporting foliage to Germany

Germany is the largest flower market in Europe. After a few years of decline, imports of foliage are increasing again. German consumers traditionally buy a lot of mixed bouquets at florist's shops. The increasing market share of supermarkets is a concern to suppliers of mixed bouquets and foliage. Collaboration with Dutch traders that specialise in supplying to German retailers and additional efforts to promote mixed bouquets in supermarkets are an opportunity to increase demand further.

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1. Product description

Tropical foliage, Monstera leaf. Source: Shutterstock



Foliage, *Asparagus setaceus*. Source: Shutterstock

Cut foliage or decorative green leaves refer to vegetation used mainly in bouquets, although it is also sold as separate decorative elements. The most frequently used varieties are evergreen plants with green, silver or variegated leaves. Examples include *Asparagus setaceus*, Monstera leaf (Swiss cheese plant), Eucalyptus, Ficus, Anthurium leaf, Galax and *Arachniodes adiantiformis* (better known as Leather leaf fern).

In addition to traditional ferns and asparagus, the foliage assortment has been growing in recent years to include more exotic varieties. Species such as *Howeum*, Beargrass and *Pittosporum* are becoming more popular.

The corresponding CN code for cut foliage is 06042090: Foliage, branches and other parts of plants, without flowers or flower buds, grasses, fresh, for bouquets or ornamental purposes (excl. Christmas trees and conifer branches).

The Netherlands, with the Dutch flower auction [Royal FloraHolland](#) and its specialised traders, is at the centre of the European flower trade. Foliage is often traded directly to specialised importers and only a small part of the total trade is offered at the auction. There are several specialised importers of foliage. Nevertheless, the requirements set by the Dutch Flower Auctions Association (VBN) regarding quality, size, packing and labelling are widely adopted in the industry as minimum requirements.

There are individual product specifications for various sorts of decorative greens and other types of foliage, which are defined as all products that derive their decorative value from the leaves, the branches and/or the spikes (ears) and that are sold as cut flowers. Search for the specific requirements of your own product in the VBN [product specifications search engine](#). You are advised to check regularly for changes to the specifications.

Quality

Cut flowers and foliage are traded in three quality classes, A1, A2 and B1, depending on the extent to which they meet the quality and grading criteria. This compliance is expressed in negative comments accompanying the batch. The following general quality requirements apply to [all decorative greens](#).

Batches offered for auction must meet the requirements below (in order to be traded as A1).

- The batch must be of good internal quality.
- The batch must be fresh.

- The batch must be visually free of animal and/or plant parasites.
- The batch must be free of harmful effects and/or damage from animal and/or plant parasites.
- The batch must be free of damage, deficiencies, deviations and/or contamination in:
 - flower/inflorescence/bud;
 - branch/stem;
 - leaf/needle/thorn.
- The batch must be of good form, composition, and flower and leaf colour.
- The undermost 10 cm of the stems must be free of leaves.
- The stems must be straight and sturdy enough to bear the flower.
- The batch must be uniform in colour, thickness, sturdiness and bouquet volume.
- The batch must be properly packed.
- Products that are offered for sale per bunch as unit of sale (instead of per stem) must comprise at least three branches/stems per bunch.

Additionally, for each batch:

- The branches must be free of flowers and/or flower buds. Ornamental grasses with ears are permitted.
- The use of leaf shine is permitted, provided that the leaf surfaces of the whole lot are treated.

Size and packaging

The [VBN](#) has developed size and packing requirements. Cut foliage must:

- be sold, depending on the product, per stem, in bunches of 5, 10 or 25 stems, per bunch or per kilogram;
- be supplied, depending on the product, mandatorily or not, in bundles;
- be supplied in bundles of five bunches, if they are bundled;
- be packed, depending on the product, per bunch or per bundle in sleeves;
- be supplied, depending on the product, in a cut flower container or in a box, whereby these containers/boxes have to be full.

If the product has such a heavy structure that the aforementioned requirements cannot be met

without the product suffering damage as a result, it may be possible to deviate from the packaging

requirements following consultation with and permission being obtained from the authorised auction inspector.

Labelling

It is obligatory to label every packaging unit (e.g. bucket, box) with product and supplier information, namely:

- supplier number
- variety name
- amount (e.g. stems) per packaging (bucket, and so on)

VBN also recommends adding grading marks and the name of the supplier.

Tips:

Visit the [VBN](#) website to find out about changes in product specifications.

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

2. What makes Germany an interesting market for foliage?

Germany is the largest market in Europe with yearly imports of about € 65 million worth of foliage, excluding foliage in mixed bouquets. Direct imports from developing countries are small, however. Most trade is going through the Netherlands. Nevertheless, the German market has some characteristics of its own. The relatively large share of mixed bouquets, together with a focus on lower-priced bouquets, make it an interesting market for selling foliage in order to increase the value of bouquets to consumers.

Consumption

The German market for cut flowers and foliage is the largest in Europe, with about 80 million inhabitants. The average consumption of cut flowers was about € 53 in 2014. It is expected that the consumption of cut flowers will increase further in future due to economic growth. For the longer term, population decreases are predicted for Germany, which will negatively impact the total demand for cut flowers and foliage.

About 58% of the value of cut flower sales on the German market was sold as bouquets in 2012 (43% in volume). Foliage is often used in bouquets. Furthermore, Germany is a comparatively large market for winter decorations such as wreaths. These decorations are also often made with dried and dyed foliage. About 50% of the purchases was intended for own use. The share of flowers that are bought as gifts is decreasing. This has a negative impact on the position of florist's, where a large share of the gift flowers are bought.

Peak days remain important for the sales of flowers and foliage in Germany. Examples are Valentine's Day, Frauentag (Women's Day), Ostern (Easter), Tag der Arbeit (Labour Day), Muttertag (Mother's Day), Rosenmontag, and so on. Before these special days, the demand for foliage in bouquets increases significantly.

Tips:

As a novel exporter, focus on quality and build strong partnerships with your buyers instead of competing on price alone.

Contact your buyers and their customers (such as bouquet assemblers) to find out about new trends and consumer demand.

Find out what your customers value most about your products and service, as well as which aspects of your operations may be improved.

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

Production

Comprehensive and complete figures on the production of foliage in Germany are unavailable. Some production of foliage in Germany does exist. Growers supply foliage to the cooperative [Landgard](#) and its associated auction [Veiling Rhein-Maas](#) as well as to the Dutch flower auctions [Royal FloraHolland](#) and [Plantion](#).

German production of foliage mainly consists of temperate species grown in the open. The area of protected cultivation is decreasing. In Europe, the Netherlands (Anthurium leaf, Monstera, Asparagus in glasshouses and a broad range of other foliage such as tree branches, Hypericum, Oak leaf, Skimmia, Ilex and Leucothoe in the open), Italy and France (Eucalyptus and Pistache) are the largest producers of fresh cut foliage.

Israel is also an important producer of Pittosporum, Aralia, Ruscus and Leucadendron. Further away, a lot of foliage is imported from Costa Rica (Monstera, Leather fern, Aralia, Aspidistra), South Africa (Hypericum, Leucadendron, Brunia, Tyfa leaf), Ghana (Monstera) and Asia (Cordyline and various grasses).

Tips:

Pay attention to seasonal patterns in local supply. Asparagus is produced year-round in the Netherlands, for example, while some other products are only produced in the summer period (in the open). These products are imported from abroad in the winter months.

Value-added products, such as special varieties, market niches and sustainable partnerships with buyers, offer opportunities to compete.

Import

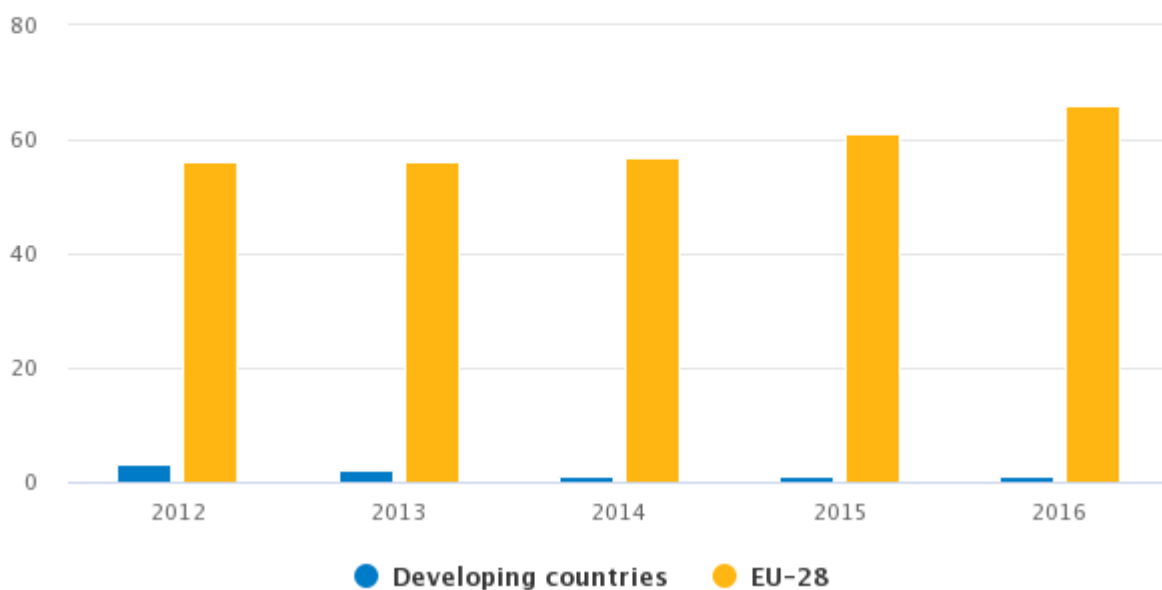
The import value of foliage in Germany has increased since 2012. The largest share of the import comes from within the EU-28, mainly from the Netherlands. The two other main import partners in 2016 were Italy (14%) and Poland (4%). Imports from the USA have declined, as it seems that trade is now running through the Netherlands. Some of the imports of foliage in Germany, however, is included in the import of mixed bouquets from the Netherlands.

Direct imports from developing countries decreased from € 12 million in 2009 to less than € 1 million in 2016. In particular, direct imports originating from countries in Central America such as Costa Rica, Guatemala and Mexico have diminished sharply. Most foliage from Costa Rica is now bought from traders in the Netherlands. From there, it is distributed to other European countries such as Germany.

This development shows that the Dutch specialised foliage traders and bouquet assemblers are increasing their presence on the German market. If you want to supply to the German market, the Dutch traders who specialise in supplying to the German market are a good option.

Figure 1: Import of foliage in Germany 2012–2016

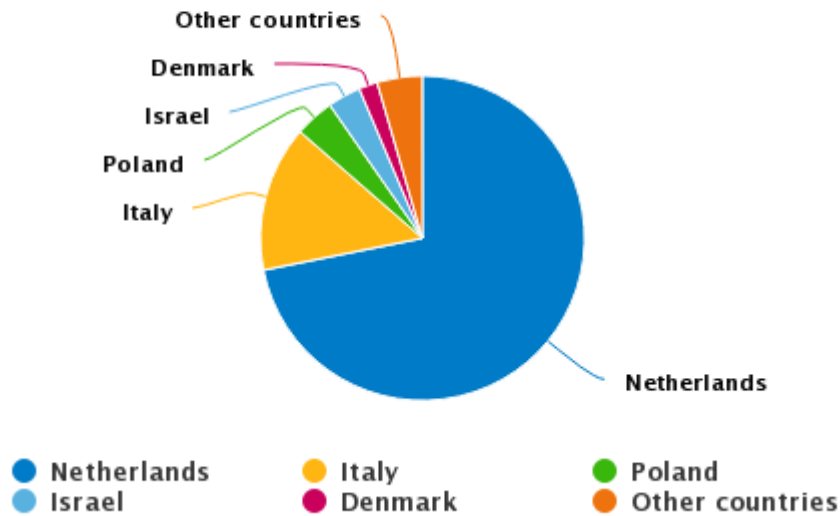
in € million



Source: Eurostat Comext, calculations by Wageningen Economic Research.

Figure 2: Division of import value of foliage (intra and extra-EU trade) in Germany 2016

in %



Source: Eurostat Comext, calculations by Wageningen Economic Research.

Tips:

The Netherlands is an important trade hub for cut foliage. If you want to supply to the German market, consider trading via the Dutch wholesale industry. They have experience in supplying to the German market.

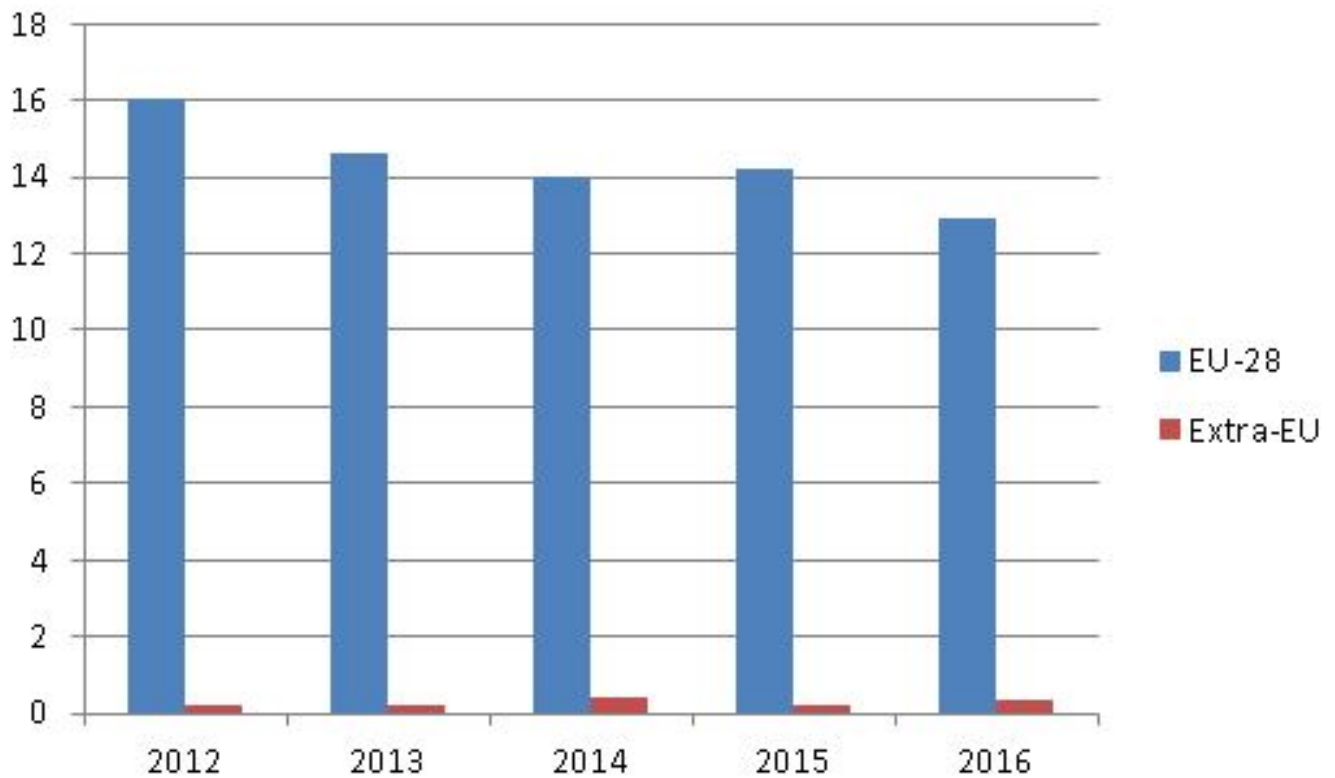
Visit the website of the Dutch Association of Wholesalers in Floricultural Products (VGB) to find potential trading partners.

Export

The export of foliage from Germany is limited, amounting to about € 13 million. There are some German exporters of cut foliage that export locally produced and imported foliage to other European countries.

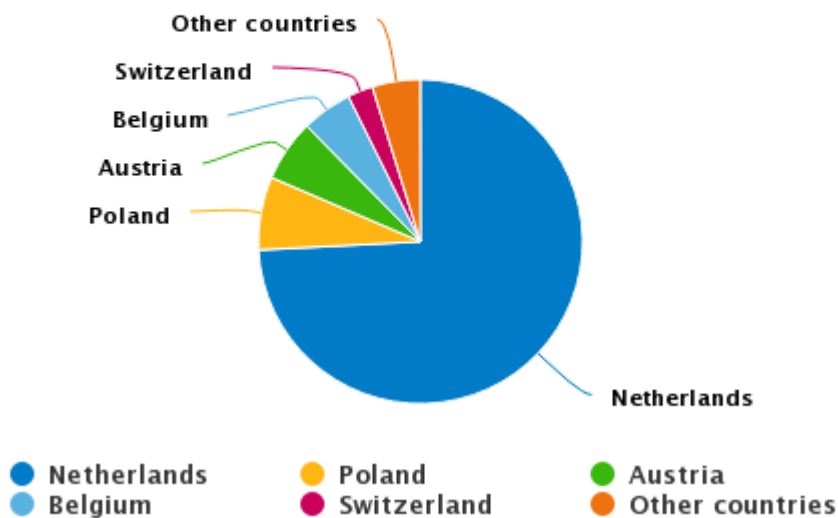
The largest exporting destination is the Netherlands with a value of € 10 million (2016). A portion is also shipped to German airports close to the border for Dutch wholesale traders. From the Netherlands, most of the exported German products are redistributed to other European countries.

Figure 3: Export of foliage from Germany, 2012–2016, in € million



Source: Eurostat Comext; calculations by Wageningen Economic Research

Figure 4: Division of export shares of foliage from Germany 2016
in %



Source: Eurostat Comext, calculations by Wageningen Economic Research.

Tips:

The Netherlands is the main trade hub for cut flowers and foliage. Germany as a market is very near to the Netherlands. Combining the German market with Dutch logistics may provide an easy access route.

Eurostat publishes [monthly and annual trade statistics](#).

3. Which trends offer opportunities on the German market for foliage?

[CBI Trends](#) gives an overview of general trends on the European market for cut flowers and foliage. A trend that influences the demand for foliage on the German market is an increased demand for Fairtrade and sustainably produced flowers, as well as an increase in the market share of supermarkets.

Increasing demand for socially responsibly produced flowers and foliage

German retailers are increasingly demanding social standards such as [MPS-SQ](#) and [Fairtrade](#). Attention to the environmental impact of production and to social standards is relatively high in Germany. Foliage is an important ingredient in mixed bouquets. In order to supply foliage that is used in certified bouquets, the foliage needs to be certified as well.

Retailers often ask for a variety of certification schemes. German retailers are also conscious of safeguarding sustainable flowers and foliage for their clients. They test flowers on maximum residue levels (MRL) and have extra environmental standards that exporters have to incorporate. It is expected that this trend will also increase demand for sustainably produced foliage.

Tips:

Larger German retailers (supermarkets and hypermarkets) are starting to demand social standards such as Fairtrade and MPS-SQ, while florists offer Fair Flowers Fair Plants flowers. 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 certification schemes for sustainability and corporate social responsibility at [ITC Standards Map](#) and [CBI Buyer Requirements](#).

Top quality and long vase life

A long vase life is essential in order to supply the German market successfully. Good post-harvest procedures, transport and packaging are very important. The freshness of the product is often the principal complaint of florists with respect to cut foliage.

Tip:

A long vase life is essential to successfully supply the German market. So make sure that the product is treated well during post-harvest and transport.

4. Which requirements should foliage comply with to be allowed on the German market?

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

Plant health

Foliage 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.

Foliage imported in the EU must be accompanied by an official “phytosanitary certificate” guaranteeing the phytosanitary condition 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 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.

Endangered species - CITES

If you are exporting flowers and foliage that are listed as endangered according to the international CITES convention, you have to take specific procedures into account in order to prove that trade will not be harmful to the survival of the species in the wild. If your product is listed in the [CITES list of endangered species](#), all exports need to be accompanied by an export permit from your country's [CITES](#) authority and an import permit from the authorities in the country to which you are exporting.

Tip:

Especially when foliage is collected from the wild, there is a chance that the species may be on the CITES list. Check for compliance with the rules before offering such products for sale.

Intellectual Property Rights (IPR)

Developing 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 foliage

For a list of requirements for foliage, consult the [EU Export Helpdesk](#), where you can select your specific product under Chapter 06049190 and 06042090.

5. Which additional requirements do buyers often have?

CSR - Corporate Social Responsibility

EU consumers are paying more and more attention to social and environmental circumstances during the production of foliage. 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 a very common requirement, while social conditions are gaining importance.

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 foliage are MPS, GLOBALG.A.P. and Fairtrade. MPS offers several standards, of which 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 foliage 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.

Ethical trading

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. Importers may participate in initiatives such as the [Ethical Trading Initiative](#) (ETI; mostly in the United Kingdom) or the [Business Social Compliance Initiative](#) (western Europe). 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:

Assess your company’s current performance by performing a self-assessment, which you can find on the [BSCI website](#).

Familiarise yourself with the [ETI base code](#) to check what [ETI members](#) require from their suppliers.

6. What are the requirements for niche markets?

Fairtrade certification

Although CSR requirements are common buyer requirements, standards that are communicated through a consumer label still represent a relatively small part of the market. However, Germany is ahead of most other European countries. An example of a relevant consumer label for foliage in the German market is [Fairtrade International](#). The market share of Fairtrade flowers has increased considerably in recent years, mainly in the supermarket segment, whereas foliage is expected to follow suit.

Tips:

Always check with your buyers whether they require certification and which certification they prefer.

Consult the [Standards Map database](#) for the different labels and standards relevant to cut flowers.

7. What competition do you face on the German foliage market?

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. For cut foliage, the main competitive element concerns substitution and the decorative appeal of the leaves and branches. The dominant position of some Dutch suppliers on the German market should be used to your advantage.

The German market is dominated by Dutch traders

A number of mainly Dutch traders such as [FleuraMetz](#) and [Adomex](#) are dominating the import market for cut foliage in Germany. They offer a wide variety of foliage and have excellent distribution and sales facilities in Germany. Some Dutch companies such as [Hoorn Bloommasters](#) specialise in producing mixed bouquets including foliage and supply to the German retailers. Partnering up with companies such as these traders offers opportunities to enter the German market.

Tips:

The German market can be entered via the Dutch flower auction or the Dutch importers/exporters. Meet the companies at trade fairs and ask for the possibility of becoming a supplier.

Do 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 buyer.

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

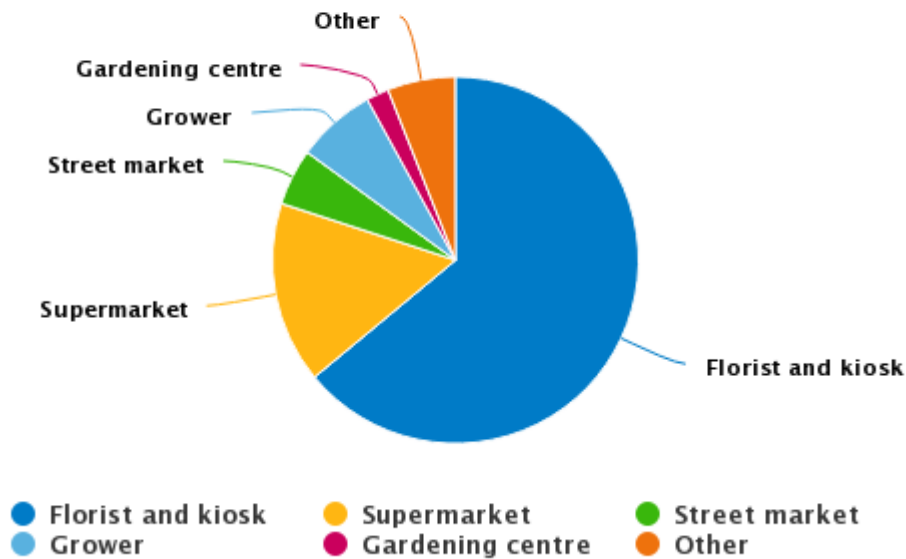
8. Through which channels can you get foliage on the German market?

For more general information on market channels and segments, you can have a look at [the CBI Market Channels and Segments for Cut Flowers and Foliage](#).

The German consumers buy flowers mainly in florist's shops (64%) and supermarkets (16%). The market share of supermarkets is gradually increasing. Dominant supermarket retailers are Aldi, Lidl and Edeka. However, the traditional florist's shops remain the most important sales channel. Supermarkets in Germany generally focus on lower-priced mono-bouquets. This trend has a negative impact on the demand for foliage.

Figure 5: Market share for cut flowers per sales channel in Germany 2020

In %




Source: Royal FloraHolland / forecast BureauSierteelt.nl.

Tip:


With an increasing market share of supermarkets and a focus on lower-priced bouquets, it is important that producers and traders of foliage show the added value of foliage to their customers. The florists can distinguish themselves from supermarkets by offering quality bouquets with speciality foliage. Promote your product to retail buyers in collaboration with our import customers.

Please review our [market information disclaimer](#).

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