

Exporting foliage to the Netherlands

The Netherlands is the main trade hub for foliage in Europe as well as an important producer. Specialised traders import and export foliage and prepare mixed bouquets for sales at retailers and florist's. This expertise makes the Netherlands a key partner for supplying foliage to the European market. Imports of foliage in the Netherlands were worth € 186 million in 2016, up € 15 million from 2012. With economic growth increasing, it is expected that the market for cut foliage will further improve.

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Tropical foliage, Monstera leaf. Source: Shutterstock



Foliage, *Asparagus setaceus*. Source: Shutterstock

Cut foliage or decorative green leaves refers 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 to include more exotic varieties. Species such as Hypericum, Beargrass and Pittosporum have become 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, however, is mainly 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.

1. What makes the Netherlands an interesting market for foliage?

Being the major importer of foliage in Europe, and serving as a distribution hub for other European countries, the Netherlands is an attractive target market for foliage. The Netherlands is also worth considering as an end

market because of the Dutch preference for high-quality bouquets with decorative foliage and fillers, as well as a high expenditure on flowers per capita.

Consumption

In the [Trade statistics document for cut flowers and foliage](#) on the European market, you can find that the consumption of cut flowers in the Netherlands is about € 52 per year per capita. That is about € 900 million per year in the Netherlands in total.

There are no data available on foliage, but it is often used in bouquets, which account for 57% of the total consumption of cut flowers. About 65% of the flowers purchased in the Netherlands are for personal use.

Florist's shops are popular, forming an especially important sales channel for quality bouquets and flower arrangements. A large share of the gift flowers are purchased at florist's shops. In 2015, the Dutch spent € 613 million on flowers in florist's shops (Detailhandel.info, 2017). In terms of volume, florist's shops sell 37% of all flowers on the Dutch consumer market.

However, during the past years, the share of florist's in flower sales declined. This decline is mainly due to the competition from supermarkets and online shops. The supermarkets compete on price and convenience, offering smaller and lesser-quality bouquets or mono-bunches without foliage. At the same time, the share of cut flowers that are bought as a present is decreasing. This development also has a negative influence on the position of florist's shops.

It is expected that the decline in share of florist's shops will continue in future. At the same time, the supermarkets are expected to widen their flower assortment. This situation can constitute an opportunity for exporters of foliage. The decline in sales from florist's shops can constitute a threat to exporters of foliage, as bouquets with foliage are mainly sold at florist's.

Tips:

Contact your trade partner to discuss clients' needs.

Florist's shops are often specialised in the higher-quality segments. If you aim to supply this specialised segment, make sure that you are able to offer excellent quality and interesting varieties.

Production

Figures on the production of foliage are only available for a very limited number of countries. Central American countries such as Costa Rica, Mexico, Nicaragua and Honduras are important producers of foliage for both the European and the US market. In these countries, foliage is produced in the open (sometimes under shade nets). From there, it is exported mainly to the Netherlands and Belgium for further distribution on the European market.

The Netherlands is the second-largest producer of cut foliage in Europe, after Italy. In 2016, there were a total of 2,350 hectares of foliage in the Netherlands, including a number of other ornamental products in the open field. Additionally, there were 140 hectares of foliage and other ornamental products in glasshouses.

Dutch growers supply considerably more of their produce to the auctions than foreign growers.

The five main Dutch foliage products traded via the auctions are Asparagus, Skimmia, Panicum, Quercus and Corylus. Other important foliage products grown in the Netherlands are Salix, Pieris, Cotinus, Photinia, Ilex,

Leucothoe, Conifer, Cryptomeria, Weigela, Ligustrum and Hedera.

Dutch growers also produce typical tropical foliage products such as Monstera, Anthurium and Philodendron, which are grown in glasshouses. Some varieties of Hypericum and other berry shrubs are becoming more popular. These varieties are also produced in African countries such as Kenya and South Africa. Tropical foliage is produced in Asian countries such as Thailand, Malaysia and Sri Lanka, as well as in Central American countries such as Guatemala and Costa Rica. In Africa, Ghana is a relevant producer of tropical foliage.

The supply of foliage in the Netherlands is stable and is not expected to change much in the near future. A number of established dominant suppliers from Central America and from within the EU cover the market. As a result, entering the stable EU foliage market can be difficult. Value-added products, special varieties and market niches offer opportunities to compete.

Tip:

Consumer trends can change quickly. Stay on top of the latest trends by visiting trade fairs and asking your import agents.

Import

The Netherlands is the largest importer of cut foliage in Europe. Imports of cut foliage in the Netherlands were valued at about € 186 million in 2016. Main imports from outside the EU come from the USA, Costa Rica, Guatemala and Mexico. In the Netherlands, all species of cut foliage are traded. The majority of the products are directly imported by Dutch traders and then distributed to other intra- or extra-European countries.

Imports increased by € 15.5 million compared to 2012. This increase is most probably caused by the economy recovering from the Europe-wide economic crisis. The economic recovery is expected to continue in the short term. However, in the longer term, the import growth numbers are expected to slow. The increasing demand for imports creates opportunities for exporters of foliage to Netherlands.

Tips:

Ask a Dutch wholesale trader or import agent to help you access the European market. The Dutch wholesalers and importers association is called VGB. [The website of VGB](#) provides information on several topics that are important for trade in the Netherlands, such as phytosanitary and customs affairs or market information.

Visit your buyers or meet them at trade fairs to build trust and commitment. Monitor your buyers' satisfaction, and always be honest and direct in case of supply problems or questions.

Try to build sustainable relationships with wholesale traders and communicate proactively.

Export

In 2016, the total export value of foliage from the Netherlands was about € 177 million. The majority of exports are destined for other European countries. The main export destinations are Germany, the United Kingdom,

France and Italy. Russia used to be the most important non-EU market for export, but these figures have declined significantly since Russia introduced restrictive measures to European imports of cut flowers and foliage.

Tips:

Work together with Dutch wholesale traders. They are often specialised in specific markets and can help you to distribute your foliage on the European market.

Since the Netherlands is an important exporter, Dutch wholesale traders have to comply with industry standards. Retailers in the UK or Germany often ask for a variety of certification schemes, most of them based on MPS-A and GlobalG.A.P. Contact your wholesale trader or the supermarket for detailed information on the specific requirements.

Find monthly and annual import statistics on the [Eurostat website](#) under International trade.

When aiming at Russia as an end market, seek for opportunities to export to the Russian market directly, as there are uncertainties in the trade conditions between the Netherlands and Russia.

2. Which trends offer opportunities on the Dutch market for foliage?

In the [Trends for Flowers and Foliage on the European Market](#), the most important trends for this product group are listed. Some specific trends for foliage are described here.

As the Netherlands is recovering from the economic crisis, both purchasing power and the appetite for buying luxury goods is increasing. Traders are shifting their focus from cheaper cut foliage to speciality varieties such as eucalyptus.

Wholesale trade in the Netherlands has to comply with social and environmental requirements set by their clients. In many European countries, working conditions and environmental factors in supplying countries are becoming an important issue. Countries such as the UK and Germany specifically focus on this aspect. The Dutch are important suppliers for these markets, so the wholesale traders pay attention to this matter as well.

Dutch wholesale traders export to many European countries. In some countries, they encounter problems with agreed payment terms. Many florist's shops struggle to generate sufficient amounts of cash to pay their bills.

Tips:

Comply with social and sustainability standards. Contact your wholesale trade partner to ask what kind of standards they need.

Also contact your wholesale trader for information about compliance with environmental requirements on your target markets.

Payment terms are creating problems across the entire value chain of cut flowers. Supplying via the Dutch flower auction ensures that you will receive your money. Soon after auctioning, the payments are wired to your account. If you supply directly, you will have to wait longer, typically between 30 and 60 days. Make clear agreements with your wholesale trader on payment terms.

3. Which requirements should foliage comply with to be allowed on the Dutch 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 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 to facilitate the import and export process. For example, the Netherlands has the [CLIENT export](#) system.

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 cut flowers

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

4. 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., Fairtrade and ETI. 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 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.

5. 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. An example of a relevant consumer label is [Fairtrade International](#). The market share of Fairtrade flowers (especially in Germany) has increased considerably in recent years, mainly in the supermarket segment, whereas foliage is expected to follow suit. Germany is an important re-exporting market for Dutch traders.

Tips:

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

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

6. What competition do you face on the Dutch 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. This section provides some information about the market competitiveness of the EU market for cut foliage.

As the number of supermarket buying organisations is limited, they have increasing buyer power vis-à-vis producers and wholesale traders.

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

Foliage from other countries is sometimes replaced by cheap fillers from the summer flower assortment. Another development is that companies use less foliage in bouquets, or alternatively use more foliage to replace the more expensive flowers.

Tips:

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.

7. Through which channels can you get foliage on the Dutch 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](#). This section provides some information on the various marketing channels through which cut flowers are marketed in Europe.

Two main import segments can be distinguished on the foliage market. The first segment is the bulk segment, which is shipped in sea containers (e.g. Leather leaf fern, Asparagus, and so on). The second segment is more exclusive and is often imported in combination with tropical flowers.

The Netherlands is at the centre of the European flower trade. The trade in foliage benefits enormously from economies of scale. Shipping large quantities of foliage in sea containers is cheaper than transporting small quantities by air. Only very large wholesalers can import these quantities and realise the economies of scale. Most of these wholesalers are located in the Netherlands. They primarily import full containers of foliage

through the ports of Rotterdam and Antwerp.

After its arrival in the Netherlands, the foliage is distributed all over Europe, often by Dutch wholesale traders. Only a small share remains in the Netherlands for consumption on the local market. Focus has become the key word in EU foliage trading. More and more wholesale traders are specialising in one of the two main market segments.

In the Netherlands, florist's shops in the specialised market remain dominant, but the importance of the unspecialised segment is increasing. Supermarkets (unspecialised market) are increasing their market share at the expense of the florist's shops.

Tips:

Use the extensive network of the Dutch flower industry and auction. The flower auction is a reliable trade platform offering extensive services that can help you to enter the European market.

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