

Exporting chrysanthemums to Europe

The United Kingdom, Germany and France are main markets for cut chrysanthemums. The Netherlands and to a lesser extent Italy are large producers and dominate the European market. Chrysanthemums are popular flowers in mixed bouquets and as mono-bunches in supermarkets. After a period of slight decline, it seems that the market for chrysanthemums – helped by promotion campaigns and novel varieties – is on the rise again. This situation offers opportunities for exporters from developing countries.

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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). Chrysanthemums are a very versatile flower with many different varieties. 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. This flower auction serves as an important trade platform for both locally grown flowers and exporters from developing countries. As chrysanthemums are produced extensively in the Netherlands, the Dutch flower auction's standards are well recognised in the trade.

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.

Quality

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)".

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 (three 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 (in case of three buds) from the requirements.

Growers are responsible for grading and for the reliability of the information that they provide along 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 mixed bouquets and mono-bunches 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 bundle.

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

- be supplied in bunches of 4 stems;
- be bundled in bundles of 5 bunches;
- be packed in a sleeve for each bundle;
- 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 exporters of chrysanthemums from developing countries mostly trade directly with European importers instead of trading through the auction, the specifications provided above often apply to the direct market as well. 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 European importer/wholesaler instead of supplying to the auction.

2. Which European markets offer opportunities for exporters of cut chrysanthemums?

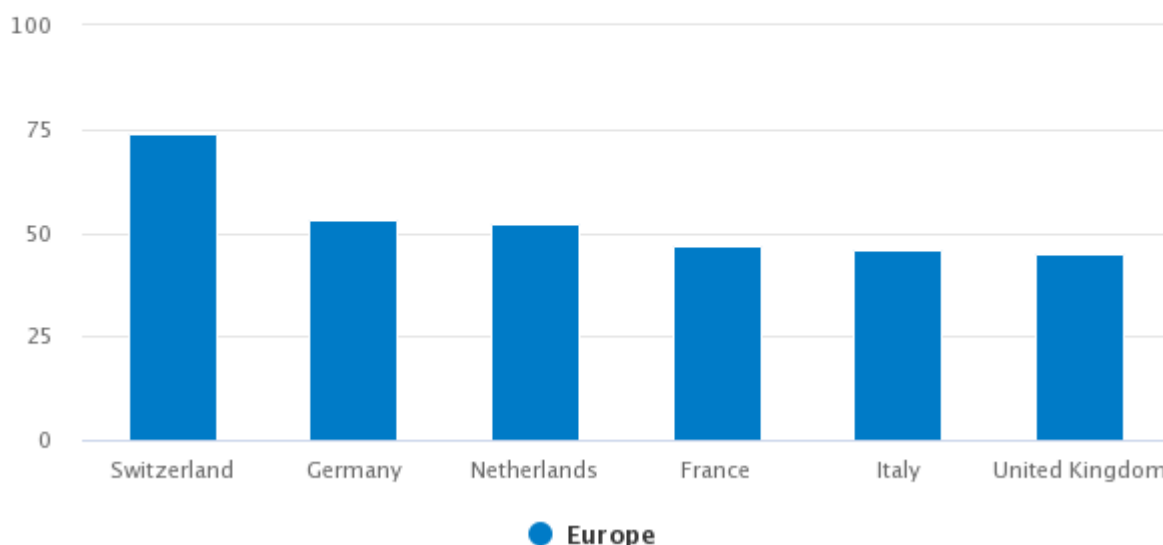
Important markets for chrysanthemums in Europe are the United Kingdom, Italy, Germany and France. Italy has a large production of its own. Chrysanthemums make up about 10% of the total imports of cut flowers in the EU. However, in the United Kingdom, Ireland, the Baltic states and a number of other central and southern European countries, chrysanthemums take a higher share which indicates a consumer preference for the flower and the relative absence of local production.

Consumption

The European market for cut flowers was estimated at around € 20 to € 25 billion in 2014 (calculation by Wageningen Economic Research, based on 2015 data from Rabobank and Eurostat population statistics). Chrysanthemums are the number two cut flower on the European market, based on auction turnover and import statistics. Their market share as a percentage of the total cut flower sales is estimated to be 10–30%, depending on the country involved.

Figure 1: Consumption of cut flowers for selected countries
2014

In € per capita



Source: Royal FloraHolland Consumentenpanel 2014, in Rabobank, World Floriculture Map, 2015.

Chrysanthemums are sold throughout the year in bouquets, mono-bunches and single stems, often bought as a present. Of all chrysanthemums on the EU market, 70% consists of sprays. Santini represent 20% and the disbud chrysanthemums represent only 10% of the total supply.

The most important colours of chrysanthemums remain white (about 60%), yellow (about 30%) and pink (about 8%). During summer, there appears to be a higher demand for white, yellow and pink, while the demand for other colours such as red, orange and autumn brown increases in autumn. In spring, bright colours such as yellow and pink are in demand. For Santini, the colour green is also very popular, accounting for about 50% of the total supply at the Flower Auction.

Peak days play an important role on the EU market. There are a number of days that generally apply to the entire European market, such as Mother's Day and Saint Valentine's Day. But many countries have additional festivities in which flowers play a dominant role. For example, in Sweden, Midsummer's Eve and Midsummer's Day (in June) are popular events in which white chrysanthemums are in high demand. Other days are also important; e.g. students in Finland and Sweden receive flowers after graduating.

In some countries, chrysanthemums – and especially the disbud and pompon varieties – are considered an autumn flower and are used a lot as grave decorations during All Saints' Day. On this day in November, it is customary for people in many European countries (especially in France, Spain and Italy) to visit the graves of deceased family members and put flowers on the graves.

Tips:

Contact your buyers often to find out about new trends and consumer demand.

European consumers buy quite a high number of bouquets. These are mostly sourced from the Netherlands or produced locally.

Find out what kinds of colours your client needs and learn about new trends and consumer demands.

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

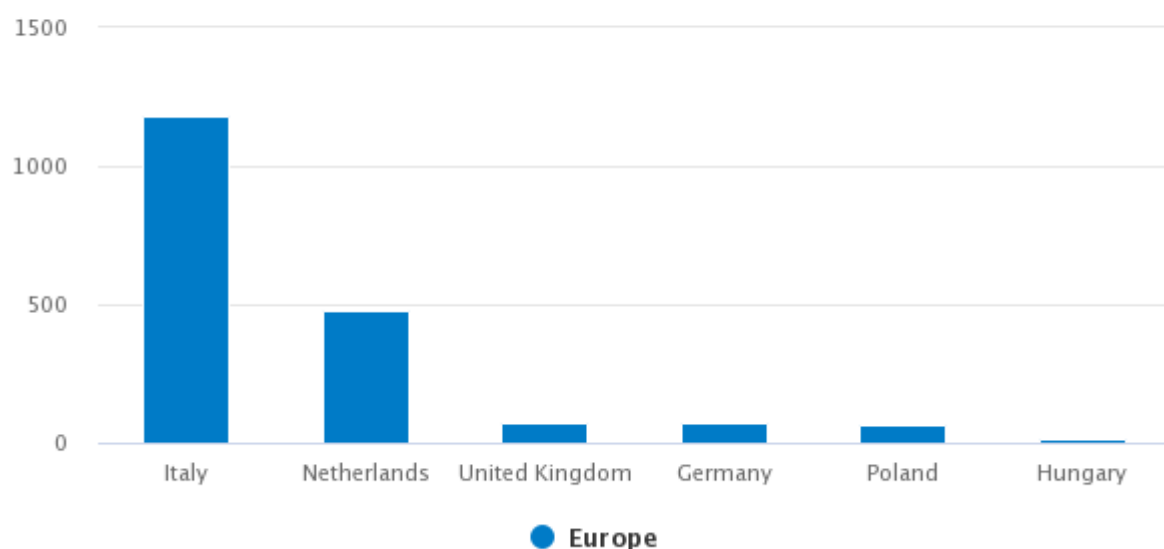
Production

The Netherlands is the most important producer of cut chrysanthemums within Europe in terms of volume. In 2015, about 1.2 billion stems of spray chrysanthemums were supplied to the Dutch auction from the Netherlands. Italy has a larger production area, but the cultivation is less intensive with fewer stems per square meter. The United Kingdom, Germany and Poland also have a domestic supply of cut chrysanthemums. Spain is a producer of chrysanthemums as well, but production figures are lacking.

In most European countries, cut chrysanthemums production is mainly seasonal around All Saints' Day. In the Netherlands, however, chrysanthemums are produced and made available year-round in supermarkets. Dutch chrysanthemums are grown in high-tech, capital-intensive glasshouses. The production of chrysanthemums is relatively stable in most European countries.

Figure 2: Production area of cut chrysanthemums, protected and unprotected cultivation 2008–2013

in hectares



Source: AIPH, 2015.

Tips:

Value-added products, special varieties, market niches and sustainable partnerships with buyers offer opportunities for exporters from developing countries.

The Netherlands is home to many world leaders in breeding that are specialised in developing new varieties.

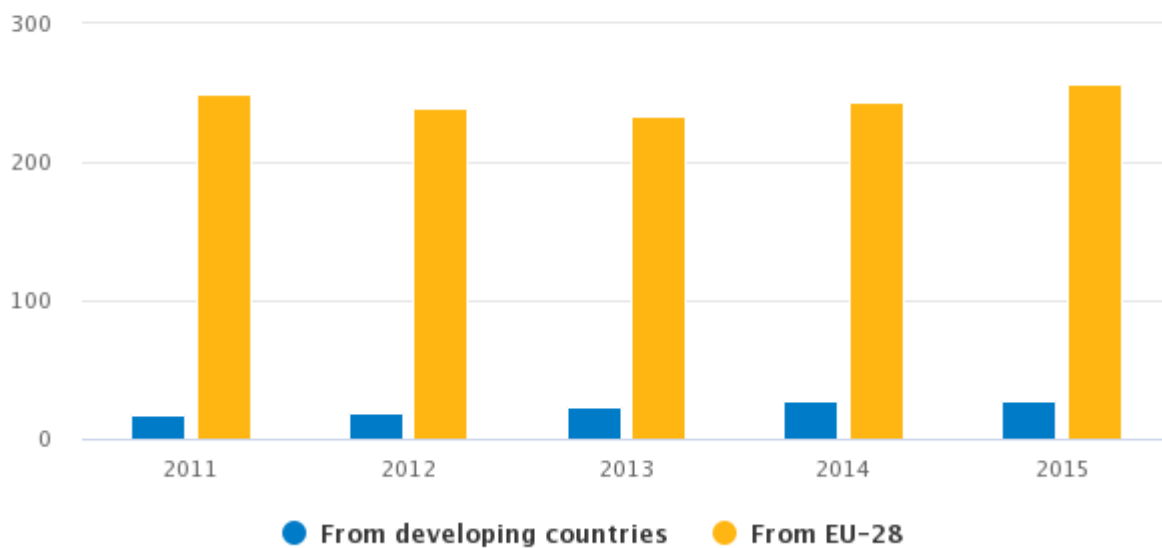
Imports

In the past three years, EU imports of cut chrysanthemums increased from € 256 million in 2014 to € 284 million in 2016. The largest share of the imports comes from within the EU-28 and is mainly imported from the Netherlands. The main EU importer is the United Kingdom (43%), while about 85% was sourced from the Netherlands. The share of the Netherlands is gradually decreasing in favour of Colombia and South Africa. It is expected that this trend will continue.

Physical imports of cut chrysanthemums in the Netherlands are limited. These mainly supplement the Dutch assortment related to price and type. But imports, especially from Colombia, are growing. During the European winter, when supply from the Netherlands is lower, there is also more room on the market for exporters from developing countries. Imported chrysanthemums come mainly from Colombia and South Africa.

Figure 3: Imports of cut chrysanthemums in the EU 2012–2016

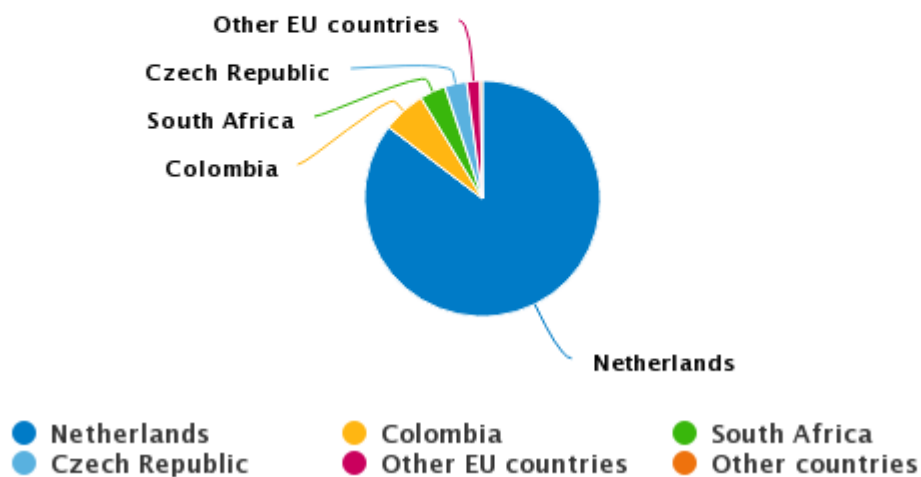
in € million



Source: Eurostat Comext, calculations Wageningen Economic Research.

Figure 4: Share of import value to the EU of cut chrysanthemums by country of origin country (intra- and extra-EU trade) 2016

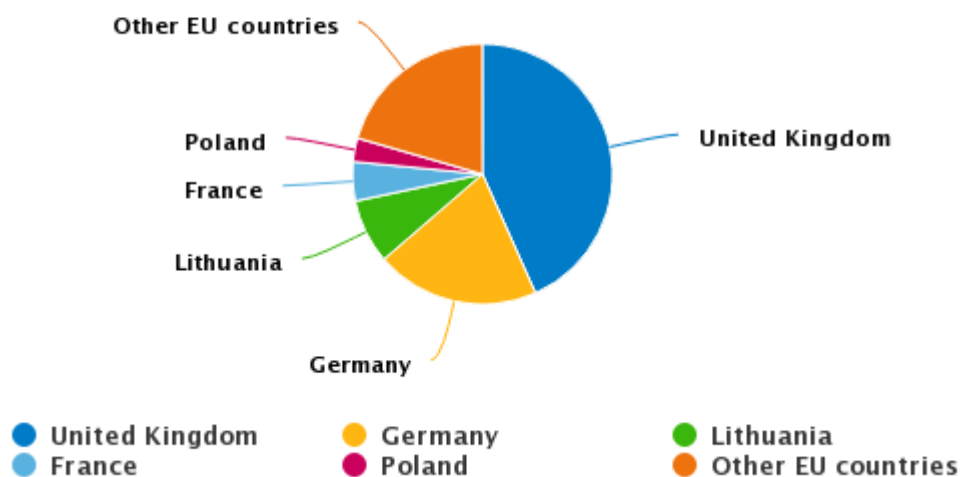
in %



Source: Eurostat Comext, calculations Wageningen Economic Research.

Figure 5: Division of import value to the EU of cut chrysanthemums (intra and extra-EU trade), by importing country, 2016

in %



Source: Eurostat Comext, calculations Wageningen Economic Research.

Tips:

All the main importers are usually present at the main flower exhibitions such as [ProFlora in Colombia](#), [IFTTEX](#) or [Naivasha Horticultural Fair](#) in Kenya.

Although most imports of chrysanthemums are shipped directly to end markets such as the UK, Dutch flower traders often play an important role. Therefore, consider trading via the [Dutch wholesale industry](#). They have experience in supplying all European markets.

You can find monthly and annual import statistics on the [Eurostat website](#).

Visit the websites of chrysanthemum breeders such as [Deliflor](#), [Dekker Chrysanten](#), [Dümmen Orange](#) and [Royal van Zanten](#) to familiarise yourself with the latest varieties. A well-known producer of chrysanthemums in the Netherlands is [Zentoo](#). Check their website to see which new varieties they are introducing.

Exports

The total exports of cut chrysanthemums from the EU amounted to € 325 million in 2016. Exports of cut chrysanthemums from the EU have decreased in value since 2012. This decrease was caused by lower exports to Russia as a result of an import ban on EU flowers. In addition, exports to the United Kingdom decreased as direct trade increased. The Netherlands is the main exporter of chrysanthemums in the EU.

Tips:

The Netherlands is an important year-round producer and exporter of cut chrysanthemums. Quantities of Dutch flowers are highest in summertime (May–September), resulting in lower prices on the European market. Pay attention to this price cycle when planning production.

You can find monthly and annual export statistics on the [Eurostat website](#).

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

Trends on the European market for cut flowers are described in the document [CBI Trends for cut flowers and foliage](#). Some of the trends that apply to cut chrysanthemums are a focus on longer vase life and a growing share of direct trade between developing countries and customers in Europe.

Longer vase life

Quality and freshness is important in every market channel, including lower-priced flowers. A vase life of ten days is often regarded as a minimum. Chrysanthemums are often used in bouquets because of their long vase life. New cultivars and better post-harvest and transport conditions have increased the vase life of many flowers. It is essential that chrysanthemum growers and traders work on further increasing the vase life of chrysanthemums as well.

Tip:

A long vase life is essential in order to supply the European market successfully, so make sure that the product is cut at the right moment and treated well during transport.

Direct trade is increasing

An increase in direct trade between producer and exporting wholesale trader, bypassing the flower auction, is very much apparent in the chrysanthemum 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.

Tips:

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.

Many European retailers demand environmental standards such as [MPS-ABC](#). 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.

Increasing internet sales and ICT in the supply chain

Information and Communication Technology is becoming more important in the sales process. Wholesale traders connect their clients to an online shop in order to create real-time insights into available stock.

There is an increasing need for information sharing between grower and trader for tracking and tracing

purposes.

Tips:

Explore technological opportunities related to information sharing, tracking and tracing. For example, RFID technology is used to monitor product quality along the supply chain and provides valuable information that you can use to further optimise your distribution.

Online shop: stocks are increasingly held at suppliers (upstream) with integrated stock management systems. This requires growers and exporters to respond quickly and efficiently to orders.

4. Which requirements should cut chrysanthemums comply with to be allowed on the European 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

EU 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 via 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 European market for cut chrysanthemums?

The European market for cut chrysanthemums is dominated by Dutch growers. In the Netherlands, chrysanthemums are grown in a high-tech, capital-intensive, but very efficient manner. These Dutch growers have a lot of experience and know-how about growing chrysanthemums as well as close-by access to the most advanced trading network for cut flowers in Europe.

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 will remain. In addition, chrysanthemums are produced in other European countries such as Italy, Germany and Spain, though mostly in the autumn season. The European market for chrysanthemums is therefore characterised as very competitive.

Although the market share of supermarkets is increasing, this development has the most impact on the smaller varieties of the spray chrysanthemums and Santinis. The heavier or more exotic varieties are typically sold at florist's. The florist's market is characterised by a large range of varieties and sizes as well as an intricate distribution network. This market offers opportunities for innovative growers of niche products, but keep in mind that the longer distribution network also requires excellent quality to maintain freshness and vase life.

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 on the European market for cut flowers and foliage](#) for more information.

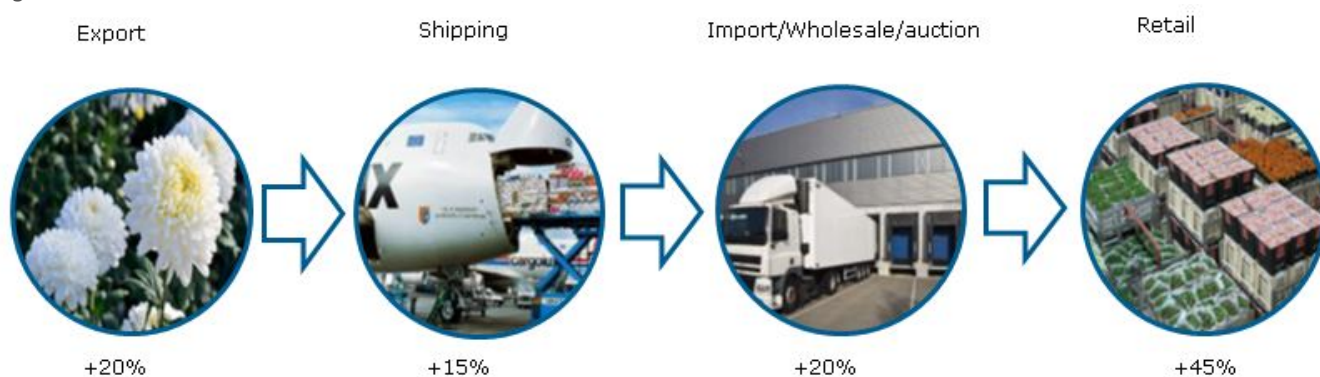
8. Through which channels can you get cut chrysanthemums on the European market?

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](#).

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


At the florist's, a bunch of five spray chrysanthemums costs about € 10. Ten disbud chrysanthemums cost about € 18. Santinis are cheaper and will cost less than one euro per stem. At the supermarket, a bunch of small spray chrysanthemums or Santinis is even cheaper at about €5. Prices differ greatly between countries and seasons. A chrysanthemum in a mixed bouquet can vary between € 0.50 and € 3 per stem, depending on the size and variety. The share that exporters receive is about 20% of the end-market consumer price.

Figure 6: Price breakdown




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