

Exporting roses to Scandinavia

Imports of roses to Scandinavia increased from €85 million to €107 million between 2011 and 2015. For Denmark, Sweden and Finland, the main import partner is the Netherlands. Norway imports directly from developing countries, mainly Kenya and Ethiopia. Sales are expected to grow further in the medium term, especially in Denmark and Sweden. Sales of sustainably and socially responsible produced flowers are growing as well, especially in Sweden. This development offers opportunities for exporters from developing countries.

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Product description

The rose (*Rosa*) is a woody perennial plant of the genus *Rosa* in the Rosaceae family. Roses are the most popular cut flower in Europe. Cut roses vary in size from large and intermediate Hybrid Tea to smaller Sweetheart roses, in colour, in fragrance and other attributes. Most commercial cut roses carry one bud per stem. After harvest (in bud), roses are stored and transported under cooled conditions until sale at the retail level. Roses are mostly sold as mono bunches or used in bouquets and other flower arrangements. Some exquisite varieties are sold as single flowers.

The HS code for fresh cut roses is 060311 - Fresh cut roses and buds, of a kind suitable for bouquets or for ornamental purposes. This product fact sheet covers the Scandinavian market, more specifically Norway, Sweden, Denmark and Finland. These four countries in northern Europe share a partly similar cultural history, but they are also different in many respects. Norway is not a part of the European Union. Finland and Sweden use the common European currency of the euro, while Denmark and Norway have their own currencies.



Roses on display at a flower shop. Source: Shutterstock

The Dutch flower auction plays an important role in the international trade in cut flowers in Europe. Although

product specifications set by the flower auction are the standard for all sales channels, keep in mind that individual buyers may have different requirements. Specific requirements for quality, size, packaging and labelling are set by the [Dutch Flower Auctions Association](#) (VBN). For direct exports to Scandinavia, product specifications will be largely the same as for the Dutch market, but you should check for any differences by contacting the importer.

Quality

The VBN requirements consist of two parts: [general requirements](#) for all flowers and [specific requirements for cut roses](#). Products which do not meet the requirements for pretreatment, minimum quality, bacteria content and ripeness are not traded and are destroyed if necessary. Please study the requirements carefully through the links above, as the details given below only represent a brief summary of the full list of requirements.

Cut flowers are traded in three quality groups: A1, A2 and B1. A1 roses must meet all the minimum requirements for internal quality, freshness, freedom from parasites, damage, deficiencies, deviations, contamination, absence of leaves on the lower 10 cm of the stem, stems that are straight and sturdy enough to bear the flower, uniformity of colour, thickness, sturdiness and bouquet volume, and proper packaging. Any deviations from these requirements may result in downgrading from A1 to A2 or B1. Cut flowers that do not meet the minimum criteria for B1 are not traded.

The batch must be free of growth defects including flat buds, grass hearts and crooked necks.

Roses are graded according to:

- Length: all Rosae must be bunched so that the stems in the bunch are even at the bottom;
- Ripeness;
- Number of bloomable buds;
- Height of flower bud: graded in 1-cm classes; the grade can be mentioned in the grade code by using characteristics code S19; the smallest height in the batch determines the code to be indicated;
- Number of stems per bunch.

Growers are responsible for the grading and 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. Satisfied customers and a good reputation are very important.

Packaging

Imported roses are often traded in cardboard boxes. Roses are often shipped without plastic sleeves to avoid the build-up of humidity. After arrival, the roses are often repackaged at the auction or by specialised importers. They are usually put into plastic flower containers (buckets) and supplied to the auction in the Netherlands or redistributed to an exporting wholesaler. The Dutch flower auction is nowadays testing the auctioning of the cut roses without unpackaging them from the cardboard boxes, in order to improve the efficiency of the logistics process.

Roses that are supplied to the auction (separate requirements exist for *Rosa floribunda*) must be:

- Supplied in bunches of ten or twenty stems;
- Provided with separate foil packaging for each barrel unit (except for Freiland roses);
- Bunched with all flower buds at the same level or in two layers. With two layers, the separate layers may not touch each other;

Supplied in clean water (containing the prescribed pretreatment agents).



Cut roses in a box. Source: [FlowerWatch](#)

Labelling

When exporting to Scandinavia through the Dutch flower auction, every stacking cart must be accompanied by a fully and correctly completed consignment note containing all required information about the stacking cart. Refer to the VBN [general product specifications for cut flowers](#) for the list of required information. In addition, every packaging unit needs to be labelled with product and supplier information, namely:

- Supplier number
- Variety name
- Amount (e.g. stems) per packaging unit (e.g. bucket)
- Grading marks (Class A1, A2, B1)
- Supplier name

Additional product labelling is often required for direct trade and will generally take place at the auction/wholesaler or bouquet producer. During trade, attention to quality labelling is important and necessary, including tracking/tracing codes and GLOBALG.A.P., MPS, FFP or other identification when required by the buyer.



Cut roses labelled for a Dutch supermarket. Source: [Global Flower Trading](#)

Tips:

Visit the [VBN](#) website regularly 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 to the European import market without using the auction clock system.

If you supply via the Dutch flower auction, regularly check your Quality Index to find out which complaints buyers have and to fix these. If you do not supply via the flower auction, find out about your buyers' satisfaction by contacting them on a regular basis and fix any complaints right away.

1. What makes Scandinavia an interesting market for cut roses?

The European market for cut flowers was estimated at around €20 to €25 billion in 2014 (calculations by Wageningen Economic Research). Per inhabitant, the consumption of cut flowers in 2014 was about €49 in Denmark and €42 in Sweden. In Finland, the consumption of cut flowers and funeral wreaths was about €42 per inhabitant in 2012 (source: Statistics Finland). Official figures for Norway are lacking, but we estimate consumption at €95 per capita, one of the highest in Europe.

Norwegian consumers spend a relatively large amount on flowers. The general price level in Norway is also higher than in most other European countries, which affects consumer prices for flowers as well. The average income per capita is also much higher in Norway (€64,000 GDP/capita) than in the other Scandinavian countries (e.g. €46,600 in Sweden and € 39,000 in Finland in 2016). This means that the average costs of distribution are also higher in Norway.

In terms of total market value, Norway and Sweden are comparable, as Sweden has twice as many consumers. By population size, Sweden is the largest country of the four with almost ten million inhabitants. The other three countries have between five and six million inhabitants each. Industry sources indicate that the market is growing in Denmark and Sweden, while Finland is a stable market.

Roses are the number one cut flower on the European market, also in Scandinavia. In Norway, the share of cut roses in imports is over 60%, while it is less than 30% in Denmark and about 40% in Sweden and Finland. This indicates the relative importance of cut roses in the Norwegian market. Consumption of cut roses is expected to grow further in Scandinavia.

In Norway and Sweden, larger-bud roses are more popular, while in Denmark smaller-bud roses are more popular. Trends in cut flowers follow trends in home decoration and interior design. For cut roses, the main colours red, pink, yellow and white are always in demand, but trends do change and specialities may attract higher prices when they are tuned to the current fashion.

In terms of consumer preferences, the Scandinavian market is a relatively traditional market where bouquets with additional foliage are popular. Seasonal flowers are popular, which means that the demand for roses is somewhat lower in spring and summer, when bulb flowers and summer flowers are in demand.

Roses are sold as mono bunches, in bouquets or as single stems, and are often bought as a present. The most important colours are red, white, pink, yellow or bi-coloured. Peak days play an important role on the European market for cut roses. There are a number of days that generally apply to the entire European market such as Valentine's Day, Mother's Day and Easter. Many countries also have additional special days on which flowers play an important role; for example, students in Finland and Sweden receive roses after graduating.

Tips:

Find out what colours your clients prefer and what new trends are expected by talking with your potential buyers.

Make sure that you are aware of **peak days** and integrate this information in your production planning.

Imports of cut roses in Scandinavia increased from €85 million to €107 million between 2011 and 2015. The share of imports from developing countries increased to almost 50% in 2015. This is almost entirely due to imports in Norway. Denmark and Sweden import almost all flowers via the Netherlands. Only in Finland, some direct imports from Kenya are emerging. Norway is not a part of the European Union, so different import tariffs and regulations apply. This is why direct imports to Norway benefit from a preferential import tariff.

Norway was the largest Scandinavian importer of cut roses with a value of almost €50 million in 2015. Sweden and Denmark imported €26 and €18 million of cut roses respectively, while Finland imported €15 million. The Finnish and Norwegian markets are seeing particularly strong growth, with a 30% to 50% increase in import value since 2011. The growth of the Scandinavian market is expected to continue in the short to medium term.

For Denmark, Finland and Sweden, the main import partner is the Netherlands. The share of Dutch import ranges from 90% to 98% for Denmark, Finland and Sweden. Many of the roses imported from the Netherlands originate from developing countries. These are sourced from the Dutch Flower Auction by specialised traders, or imported from developing countries and repackaged in the Netherlands.

Kenya is the dominant supplier in Norway and represents 72% of rose imports in 2015. Ethiopia is the other large supplier. Although statistics suggest a small role for Dutch traders, they are also active in direct trade from Africa to Norway. Large buyers of cut roses in Norway are [Mester Grønn](#) (about 120 flower shops), [BAMA Blomster](#) and [Interflora Norge](#) (about 425 flower shops), as well as the large retailers [Norgesgruppen](#) (supermarkets Kiwi, Meny, Ultra, Centra, Jacobs, SPAR and Joker), [Coop Norge](#) (Coop, ICA, Rimi), and [Reitangruppen](#) (REMA 1000).

Tips:

The Netherlands is an important trade hub for cut roses and is the major supplier of flowers to Denmark, Sweden and Finland. If you want to supply to the Scandinavian market, consider trading via the Dutch wholesale industry. They have experience in supplying to these markets.

Value added products (long stems, large buds), special varieties (colours), market niches and sustainable partnerships with buyers offer opportunities to compete.

Visit the website of the [Norwegian customs](#) for more information on specific procedures and tariffs.

2. What trends offer opportunities on the Scandinavian market for cut roses?

For more information, see our study of [Trends for cut flowers and foliage](#).

Economic growth and the demand for cut flowers is increasing

After a long period of slow growth or even decline, economic growth and the demand for flowers is finally starting to increase again. Especially Sweden and Norway showed signs of recovery in 2015, and economic growth is expected to increase further in the short and medium term. Industry sources report a growing demand in Denmark and Sweden. The Scandinavian market for cut roses is expected to benefit from the recovering economy.

Tip:

Learn about current and expected trends in colours and varieties by talking to buyers and breeders, and visiting trade fairs. The [Nordic Flower Expo](#) is a trade fair dedicated to flowers and plants in Scandinavia and the Baltics.

Discount stores are growing in Scandinavia

In all of the Scandinavian countries, discount stores are gaining market share in the groceries and convenience market. Sales of discount stores (such as REMA 1000 and Lidl) have increased, while sales of most supermarket formulae have been decreasing somewhat since 2013. Supermarkets in general (including discount stores) are increasing their market shares in the sales of cut flowers.

Tips:

Discount stores are a growing market segment which generally offers low-priced mono bunches and bouquets. Discount stores and large retailers in general are demanding customers. Before exporting directly to these customers or their flower suppliers, make sure that you are fully capable of meeting their demands.

Focus on sustainability

Scandinavian consumers are increasingly focused on sustainability. Although the market share of sustainably produced and certified flowers is still limited, the demand is increasing. [MPS A/B/C](#) or [GLOBALG.A.P.](#) certification (or equivalent) is becoming a common buyer requirement, especially for large retailers. In Sweden, [Fair Flowers Fair Plants](#) (FFP) is gaining ground. Many Swedish flower shops and wholesalers are registered as FFP participants. Sweden, Finland and Norway are also growing markets for Fairtrade flowers.

Tip:

Find more information about sustainable flowers and certification schemes on the [ITC Standards Map](#).

Top quality and longer vase life

Consumers in Scandinavia expect high-quality flowers. The flowers should be fresh and not yet fully open when sold to consumers. Customers also expect a long vase life, both for premium flowers sold at flower shops and for lower-priced bouquets sold at supermarkets.

Tips:

Excellent quality and a long vase life are essential in order to supply to the Scandinavian market successfully.

There might be additional requirements for trading on the direct market, particularly in the supermarket sector. 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.

3. What requirements should cut roses comply with to be allowed on the Scandinavian market?

Customs procedures and tariffs

The legislative and buyer requirements for cut roses on the Scandinavian market are in most respects the same as for the rest of the European Union (EU). Import documentation, tariff rates and plant health legislation differ slightly for Norway, as it is not a part of the European Union. For flowers exported from the EU to Norway, a tariff of 150% is applied from April 1 to October 31. Other legal and non-legal mandatory requirements regarding breeders' rights and endangered species are similar.

Tips:

See our study of [Buyer Requirements](#) for more information.

Contact [Open Trade Gate Sweden](#) if you have specific questions regarding rules and requirements in Sweden.

See the [Norwegian Customs](#) for more information on entering the Norwegian market.

Plant health

Roses imported to Scandinavia must be accompanied by an official "phytosanitary certificate" guaranteeing the phytosanitary conditions of plants and plants products, as well as 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 for obtaining the phytosanitary certificate.

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

Read more about [plant health](#) in the EU Export Helpdesk.

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 roses 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.

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

Sustainability certification

Scandinavian consumers pay more and more attention to social and environmental issues during flower production and distribution. As a result, buyers require you to meet certain environmental and social standards in the form of certification schemes and consumer labels. Compliance with environmental standards (focusing on pesticide and water use) is a very common requirement, while social conditions are gaining importance.

Tips:

Both buyers and consumers in Scandinavia 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 in the communication with potential buyers.

The most important B2B quality schemes for roses in Scandinavia are MPS and GLOBALG.A.P. The MPS organisation offers several standards, of which MPS-ABC certification covers environmental performances and is considered a must for growers. Furthermore, there are several other schemes such as 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.

Tip:

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

Fairtrade certification

Although corporate social responsibility (CSR) requirements are common buyer requirements, standards that are communicated through a consumer label still represent a relatively small part of the market. Examples of relevant consumer labels are [Fair Flowers Fair Plants \(FFP\)](#) and [Fairtrade International](#). The market share of Fairtrade roses increased considerably in the last several years, particularly in the supermarket segment. FFP flowers are available at many florists in Sweden.

Tips:

Always check with your buyers if they require certification and, if so, which certification they prefer.

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

4. What competition do I face on the Scandinavian cut roses market?

Scandinavia has only limited production of cut flowers, as most flowers are imported. Norway mainly imports cut roses directly from Africa. Roses from the Netherlands and the rest of the European Union are only allowed on the Norwegian market from 1 November to 31 March. In the other months, an import tariff of 150% applies. Denmark, Sweden and Finland are almost exclusively supplied through the Netherlands.

Competition changes during the season and from year to year, as supply and demand differ. The European winter months are generally less competitive, as supply from Europe is limited. However, competition on the Scandinavian market is as fierce as anywhere on the European market. This is particularly true for Norway, where demanding importers and retail customers are used to dealing directly with suppliers from developing

countries. Only very well-organised and professional suppliers can meet the standards set by large retail buyers.

The number of supermarket buying organisations is limited and, as a result, they have a high buyer power over producers and wholesale traders. On the whole, competition on the Scandinavian market for cut roses does not differ from competition for most other major types of cut flowers on the European market.

Tip:

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

5. Through which channels can you get roses on the Scandinavian market?

The trade channels and market segments for cut roses in Scandinavia do not differ much from those in other countries in Europe. The main difference between Norway and the other countries is that Norway mainly imports directly from developing countries. Florists are the main outlet for flowers in all Scandinavian countries. Supermarkets have a somewhat higher market share in Denmark and Sweden than in Norway and Finland. In Sweden, gardening centres are also a major retail outlet for cut flowers.

Florists are the dominant sales channel in Denmark, but supermarkets' share is increasing. In Sweden, gardening centres are also a major sales channel. Gardening centres in Sweden have a separate, well-equipped flower corner that can compete with flowers shops. Finnish and Norwegian consumers bought about ten percent of their flowers in supermarkets in 2010. Recent data are lacking, but the share of supermarkets is increasing. Nevertheless, supermarkets are less oriented towards selling flowers in Norway and Finland than in Denmark.

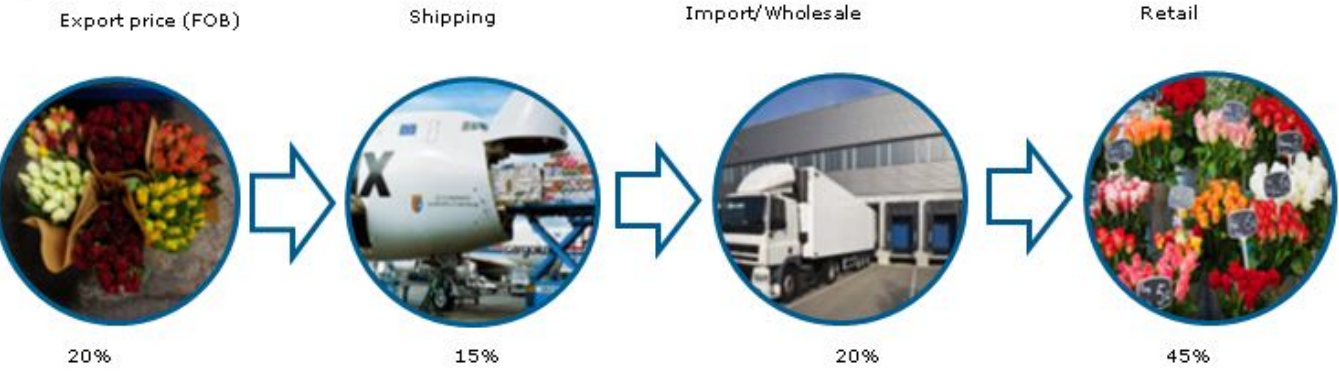
Tip:

See our study of [Trade channels and market segments for cut flowers and foliage](#) for more information.

6. What are the end-market prices for cut roses?

In Sweden and Denmark, prices for 15 to 20 medium-sized red roses at the florist are around €40 to €60. In general, prices are higher for longer stems and larger buds. Prices also vary during the season and increase during peak days, such as before Valentine's Day. Prices are lower at supermarkets. Shipping cut flowers to the Scandinavian market costs about 20-40% of the export value (Free On Board, FOB) through transport costs, insurance, tax and documentation costs, depending on the distance and country- or airport-specific costs.


Figure 7: Price breakdown




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