

## Exporting roses to Europe

Roses are the number one cut flower on the European market. Imports of fresh cut roses to the European Union (EU) from third countries increased from €588 million to €718 million between 2011 and 2015, and are expected to increase further in future. The main importers in the EU are the Netherlands, Germany and the United Kingdom, who together account for about 70% of all imports of cut roses in the EU. Increasing market demand, increasing sales in supermarkets and on the internet, as well as attention to sustainability and product innovation offer opportunities for exporters from developing countries to enter the European market.

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## 1. Product description

The rose (*Rosa*) is a woody perennial plant of the genus *Rosa* in the Rosaceae family. Standard cut roses vary in size (large and intermediate Hybrid Tea, and smaller Sweetheart roses), in colour (from white to red and combinations), in fragrance and other attributes. Most commercial cut roses carry one bud per stem; *Floribunda* or spray roses carry more buds per stem but are commonly regarded as garden flowers. Most species are native to Asia, with some native to Europe. 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 roses is 060311 - Fresh cut roses and buds, of a kind suitable for bouquets or for ornamental purposes.



Roses on display at a flower shop. Source: Shutterstock

The Dutch flower auction ([Royal FloraHolland](https://www.floraholland.com)) is the main marketplace for cut flowers in Europe. Flowers from

all over the world find their buyers through the auction and the Dutch network of flower traders. Specific requirements for quality, size, packaging and product information are set by the Dutch Flower Auctions Association (VBN) in agreement with growers and traders. These requirements must be met by growers to sell at the auction. The auction serves as an important trade platform for exporters from developing countries. We refer mainly to these requirements that are widely adopted as minimum requirements across the entire cut flower chain.

## 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 (VBN). 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. In general, a grower's good reputation is often rewarded with a higher average price per stem.

## Packaging

Imported roses are often traded in cardboard boxes. The quantity of roses in these boxes is increasing to reduce costs. 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 10 or 20 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 Europe 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 will generally take place at the auction/wholesaler or bouquet producer and is often required for direct trade. The barcode and/or QR code, article code, selling price and other details imposed by the supermarkets should already be printed on labels:

- Tracking/tracing information;
- GLOBALG.A.P., MPS, FFP, or other certification label;

Pre-labelled price information (see picture below).



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, bypassing the Dutch flower auction.

## 2. What makes Europe an interesting market for cut roses?

As you can read in the [CBI Trade Statistics for cut flowers](#) document, the European market for cut flowers was estimated at around €20 to €25 billion in 2014 (calculations by Wageningen Economic Research, based on 2015 data from Rabobank and Eurostat population statistics). Roses are the number one cut flower on the European market. Their market share as a percentage of the total cut flower sales is estimated to be 30-50%, depending on the country involved.

Germany, France, the United Kingdom and Italy are the largest consumer markets for cut roses. Western and southern European consumers spend between €20 and €50 per capita per annum on cut flowers. In Central and Eastern European countries, consumption is somewhat lower. Per capita consumption is the highest in Norway and Switzerland, exceeding €80 per capita. Spain is the only European country besides the Netherlands and Belgium that imports more flowers from developing countries than from Europe. The market for cut roses is expected to grow moderately in the next five years, mainly due to modest economic growth and further market development in Central Europe.

Roses are sold as mono bunches, in bouquets or as single stems. The most important colours are red, pink and white. Roses are often bought as a present. Consumers in Germany, the United Kingdom, Belgium, the Netherlands and Denmark buy flowers more often for their own use. In countries such as Poland, the Czech

Republic, Austria and France, the majority of flowers in volume are bought as presents.

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 Mother's Day and Valentine's Day. Many countries have additional special days on which flowers play an important role; for example, students in Finland and Sweden receive roses after graduating.

Consumer preferences differ between European countries, and trends change between and during seasons. Special occasions such as national holidays or large sports events may temporarily increase demand for certain types of roses. Being innovative and offering clients new varieties will improve your company's profile. Make sure to ask your customers first about tomorrow's trends, however, and test market responses; for example, by producing and offering small batches before full-scale market entry.

### **Tips:**

Find out what kind of colours, sizes and varieties your clients need, and learn about new trends by talking with your potential buyers.

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

Imports of cut roses to the EU increased between 2011 and 2015. Most cut roses were imported from within the EU-28, mainly from the Netherlands (40%). The total EU imports from developing countries amounted to €718 million in 2015, which represented a 22% growth from 2011. The leading suppliers from developing countries in 2015 were Kenya (€343 million), Ethiopia (€157 million) and Ecuador (€132 million), with the Netherlands (60%), Belgium (17%, mainly destined for Dutch auction and traders), the United Kingdom (11%), Germany (6%) and Spain (4%) as the main destinations.

Europe also produces cut roses. The Netherlands used to be a very important producer, but the area under cultivation for this purpose has been gradually falling. Production of sweetheart roses in particular has shifted largely to East Africa. During the past decade and a half, the Dutch area was reduced from 932 hectares in 2000 to 280 hectares in 2015. Despite this decrease in area, the Dutch product is still in demand from buyers. The main reasons for this are freshness and the production of exclusive varieties.

### **Tips:**

The Netherlands is an important trade hub for cut roses and is the main destination for roses produced in developing countries. Therefore, consider trading via the [Dutch wholesale industry](#). They have experience in supplying to all European markets.

All the main importers are usually present at the main flower exhibitions such as ProFlora in Colombia or IFTEX and the Nairobi Flower Show in Kenya.

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

During summer, the supply of roses produced in the EU is at its peak, resulting in lower prices on the European market. Pay attention to this price cycle when planning production.



### 3. What trends offer opportunities on the European market for cut roses?

Major 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 specifically apply to cut roses are a growing attention to sustainability and a longer vase life, as well as a growing market share of supermarkets.

#### Increasing demand for socially responsible and sustainably produced roses

Mainly in traditional markets such as the United Kingdom, Germany and Scandinavia, the demand for roses that are certified as socially responsible and environmentally friendly is increasing. Many EU retailers require suppliers to comply with production standards that involve Good Agricultural Practices or environmental and social standards, including MPS-ABC, GlobalG.A.P., Fairtrade and ETI. Large retailers often ask for a variety of certificates. This trend is less prominent in the traditional florist and market stalls sales channels. The main elements of environmental responsibility are energy consumption during transport, pesticide use and water use. These elements are translated into the various certification schemes.

#### Tips:

Many EU retailers are starting to demand social standards such as Fairtrade roses, MPS-SQ or ETI. Retailers often ask for a variety of certificates. Find out which retailers are asking for which combination of certification schemes and how you can comply.

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

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

#### Top quality and longer vase life

Quality is a prerequisite for supplying to the EU market. Good quality is important in every market channel, also for low-priced flowers. A vase life of approximately seven days is often regarded as the minimum.

#### Tip:

A long vase life is essential to successfully supplying the EU market, so make sure that the product is cut while the bud is still closed and is treated well during transport.

#### Growing market share of supermarkets and direct trade

Direct trade between producers and European wholesalers, bypassing the Dutch flower auction, is increasing. Wholesale traders set a wide variety of buyer requirements (based on the requirements set by their client) that may deviate from the general auction requirements. Supermarkets are gaining market share in many European countries. This market channel is demanding in terms of product and logistics requirements, but it may offer opportunities to companies that are well managed and have some experience in supplying to the European market.

### **Tips:**

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

If you are ready to trade on the direct market, explore growing market segments such as the supermarket retail channel.

## **Increasing internet sales and IT in the supply chain**

IT systems are now prevalent in the marketing process. Online business (e-commerce) is taking over the physical buying process at the auction and at wholesale cash and carries. Telephone calls are replaced by mouse clicks in the web shop. This has had a significant impact on trade. Examples include the auction's distance buying system and linked web shops for both the auction and the wholesale trade. This leads to the disconnection of physical supply logistics from the actual trading place. Purchases are based on a digital product image. Growers therefore need to pay constant attention to consistent quality and reliable information, as wholesalers prefer to work with the most reliable suppliers. Unreliable or false information about product quality may lead to a lower "quality rating" and a loss of sales.

### **Tips:**

E-commerce requires information standards and reliability in terms of quality and the information provided. Learn about buyer requirements, quality control and e-commerce-related IT systems. Check [Floricode](#), a sector initiative for the registrations, standards and codes for information management in the ornamental industry.

IT systems are vulnerable to trust issues. Be consistent and as honest as possible when supplying digital information about product quality.

Stocks for online shops are increasingly held at suppliers (upstream) with integrated stock management systems. This requires growers and exporters to respond quickly and efficiently to orders.

The Dutch Association of Wholesale Trade in Horticultural Products (VGB) and the Dutch Flower Auction Royal FloraHolland can provide a range of information about available software systems and electronic applications.

## **4. What requirements should cut roses comply with to be allowed on the European market?**

### **What legal and non-legal requirements should my product comply with?**

#### **Plant health**

Roses 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.

Roses imported to the EU must be accompanied by an official "phytosanitary certificate" guaranteeing the

phytosanitary conditions of the 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.

Check if 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.

## Intellectual Property Rights (IPR)

Developing new rose varieties is often very expensive. The developers of new varieties want their 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 roses, consult the [EU Export Helpdesk](#), where you can select your specific product under chapter 06031100.

## What 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 roses. As a result, EU buyers require you to meet certain environmental and social standards in the form of certification of B2B schemes and consumer labels. Compliance with environmental standards (focusing on Good Agricultural 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 quality schemes for roses are MPS, GLOBALG.A.P., Fairtrade and ETI. MPS 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.

### 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 the requirements for 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 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.

## 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 roses

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 of roses. Therefore, EU 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.

## **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, mostly in north-western Europe. Examples of relevant consumer labels are [Fair Flowers Fair Plants \(FFP\)](#) and [Fairtrade International](#). The market share of Fairtrade roses increased considerably in the past couple of years, particularly in the supermarket segment.

### **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 to cut flowers.

## **Organic**

The market for organic roses is very small. Organic roses must be produced and processed by natural methods defined in [EU legislation](#). Some flower traders perceive organic flowers as a lesser-quality product due to a lower aesthetic quality and durability. As such, organic flowers are not yet particularly favoured in Europe.

### Tip:

Growing organic roses could represent an opportunity in future.

## 5. What competition do I face on the European cut roses market?

Cut roses are imported from a number of countries, most notably Kenya, Ethiopia and Ecuador. They are also still produced in the EU, although production declined in recent years. Roses make up the majority of cut flower consumption in most EU countries. Competition in the EU market for cut flowers changes during the season and from year to year, as production and demand vary. On the whole, competition is high. Competition in the EU market for cut roses does not differ substantially from that for most other major types of cut flowers. Further information about competition on the EU market for cut flowers can be found in the general information section on [Competition for cut flowers and foliage](#).

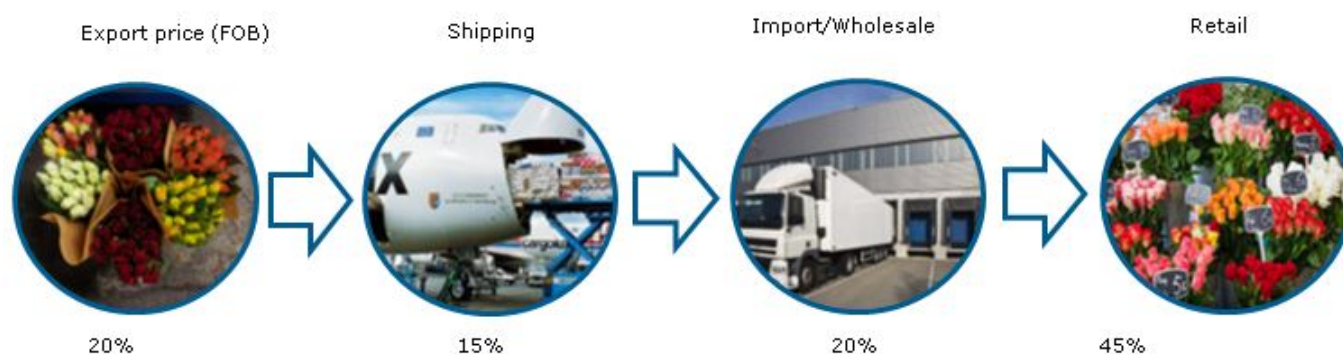
## 6. Through which channels can you get roses on the European market?

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


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

Roses are sold as mono bunches, in bouquets or as single stems. Consumer prices differ depending on the market segment and country involved. In the Netherlands, a mono bunch of 15 medium-sized red roses currently sells for about €20 to €30 euro when bought at a florist shop. A bouquet of 15 large-bud, long-stemmed red roses sells for about €40. A bunch of 10 small roses in the supermarket sells for much less, between €3 and €10. Figure 4 below gives an estimation of the average price breakdown, showing the added value in the various parts of the supply chain as a percentage of the consumer price. The cost of shipping cut flowers to the EU (transport costs, insurance, tax, documentation costs, airport tax and additional charges in some countries) amounts to about 20-40% of the export value (Free On Board, FOB), depending on the distance; this corresponds to about 15% of the consumer price.


Figure 4: Price breakdown



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