

Exporting carnations to Poland

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Poland is one of the larger EU countries, with 38 million inhabitants. It is one of the faster growing economies in the European market and generally very much flower minded. Imports of cut flowers and foliage in Poland have grown in recent years from €65 million in 2011 to €89 million in 2015. Carnations make up some 5 to 10% of the total import value. The value of imports of carnations doubled between 2011 and 2015. Most of the imported cut flowers and also carnations are imported via the Netherlands, although some direct imports from Colombia and Kenya have been occurring in recent years. While the Polish import market is growing, the country also has a considerable production of its own of quality flowers. Poland may rightly be called a flower country!

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1. Product description

Carnations are also referred to by their botanic name *Dianthus caryophyllus*. In Poland, carnations are called 'Goździk'. Carnations are a perennial herbaceous plant, that are native to Eurasia or the Mediterranean region. Carnations have been extensively cultivated for the last 2,000 years. Carnations grow up to 80 cm tall. The flowers of 3–5 cm in diameter are produced singly or up to five together in a cyme (spray carnation). The original natural flower colour is bright pinkish-purple. Due to extensive breeding, other colours including red, white, yellow and green, are available. Carnations have a light perfume. The corresponding CN code is 06031200 fresh cut carnations and buds.

Key product specifications

In Poland, carnations are commonly sold at flower shops and kiosks as well as at supermarkets. They are sold both as single flowers as well as in bouquets (standard disbud carnations mainly) and mono-bunches (mostly spray carnations). Most carnations are imported via the Netherlands. The Netherlands imports carnations mainly from Colombia, Kenya, Turkey, Ethiopia and also from within Europe from Spain and Italy. The Dutch flower auction ([Royal FloraHolland](#)) is the main marketplace for buying and selling cut flowers in Europe. Although a lot of carnations are traded at the auction, most carnations are traded outside the auction, directly from exporters in developing countries to importers and wholesalers in Europe. In the case of Poland, Dutch traders play a

dominant role. Key product specifications may differ between the direct trade channel and the auction. However, the Dutch Flower Auction provides general product specifications for cut flowers and carnations which are widely recognized in the trade and also apply to the Polish market. As these product specifications are well documented we will present them here as a reference. Keep in mind that specific requirements of individual buyers may differ. There are specific requirements regarding quality, size, packing and information on the product (labelling) set by the Dutch Flower Auctions Association (VBN) in agreement with growers and traders for all flowers traded at the flower auction. Below, we refer to these requirements that are widely adopted as minimum requirements across the entire cut flower industry including flowers traded in the direct channel.

Quality and grading: Cut carnations may be traded at the auction if they meet the VBN requirements. Grading and other requirements may differ for individual buyers in the direct trade channel. These requirements consist of two parts: [general requirements](#) for all supplied flowers and [specific requirements for cut carnations](#). Products which do not meet the requirements regarding pre-treatment, minimum quality, bacteria content and ripeness are not traded and are destroyed if necessary (VBN). You are advised to study the requirements carefully through the links included above, as the requirements listed below are only a small summary of the full requirements.

- Carnations are traded in 3 quality groups: A1, A2 and B1, depending on the extent to which they meet the quality and grading criteria.
- The following specific requirements apply to all carnations:
 - The batch must be free of shrunken flowers and/or 'shrinkers';
 - The batch must be free of woody stems;
 - The batch must be free of crooked necks.
- The following additional requirements apply to spray carnations:
 - The stems must have a minimum of 3 'bloomable' (mature) flower buds. 2 buds can show a slight deviation; 1 bud can show a serious deviation;
 - The batch must be free of visible remnants of the main flower;
 - The batch must be free of torn flowers;
 - The batch must be free of excess shoots.
- The following additional requirements apply to standard carnations:
 - The batch must be free of buds;
 - The batch must be free of stuck flowers;
 - The batch must be free of torn flowers.
- Carnations are graded per batch according to:
 - length;
 - ripeness;
 - number of bloomable buds.

At the Dutch flower auction, growers are responsible, through self-assessment, for grading and the reliability of the information they provide with their lot. However, the auction assesses customer reclamations to check the reliability of the suppliers. A reclamation can e.g. be the result of incorrect product information on the consignment note or labels. The [Quality Index \(QI\)](#) is based on the number of customer complaints or reclamations in the last 8 weeks. Information on your QI is shared with customers and reported back to you including the number and content of product reclamations. In general a grower's good reputation, based on constant quality, is often rewarded by a higher average price per stem.

Packaging: Export and import trade often involves 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 auction requirements for packing and loading.

Spray carnations (non-disbudded with several flowers and/or buds) at the auction:

- Must be supplied in bunches of 10 stems;
- Must be packed per bunch in a hot needle-perforated sleeve.

Standard carnations (disbudded with large single flower):

- Must be supplied in bunches of 20 stems;
- Must be bunched in two layers, whereby 12 flowers form the upper and 8 flowers the lower layer
- Must be packed per bunch in a hot needle-perforated sleeve.

Other carnations:

- Must be supplied in bunches of 10 stems
- Must be supplied in bundles of 5 bunches.

Final sales consists mainly of mono bunches and mixed bouquets in either plastic containers or special containers, e.g. from bouquet producers, at specialist florist shops and supermarkets. Bouquets and flowers are sometimes pre-packed in plastic or paper sleeves, sometimes assembled and wrapped at the florist shop.

Loading must be optimised, whereby the volume of the bunches determines the number of supplied bouquets 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
- Spray carnations must be packed in the specific quantities per container, depending on the weight of the bunch. Detailed information can be found in the [Dianthus product specifications of VBN](#).
- Carnations with a stem length shorter than 45cm must be supplied in a small container (container code 566).

Labelling: When exporting through the Dutch auction, the flowers are often loaded on a stacking cart. 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. stems) per packaging unit (e.g. bucket, etc.);
- The grading marks (Class A1, A2, B1)
- Supplier name.

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

Tips:

- Visit the [VBN](#) website to find out about changes in product specifications.
- Contact your import agent or your potential client about any additional requirements if you wish to supply directly.

2. What makes Poland an interesting market for carnations?

In terms of imports, cut carnations make up about 5–10% of total Polish imports of cut flowers and foliage which amounted to a total of €99 million in 2015. In 2015, Poland imported about €6 million of cut carnations. Imports of cut flowers in general and cut carnations in particular have been gradually growing over the past decade although the economic recession in Europe did have some negative effect on demand in Poland too. In 2015 a drop in imports of carnations is observed in Eurostat Statistics. At the same time the Netherlands reports a strong growth in exports to Poland, to €10 million in 2015 indicating a corresponding import value in Poland of about €12 to €15 million. The overall picture from the various trade statistics is a growing import market in Poland.

Most cut carnations imported in Poland are imported from the Netherlands and from Turkey. We estimate that about 60-80% is traded via the Netherlands. On top of that, many flowers from developing countries are exported directly to Poland, but still administratively settled at the flower auction in the Netherlands. This could explain the large differences in trade statistics.

Poland is a relatively large producer of cut flowers too, with an estimated production value of €270 million in 2013. The total area of flowers and ornamental plants amounted to some 5.5 thousand hectares in 2014 of which 1.6 thousand hectares under protected cover. About 60% of this area is estimated to be cut flowers. Poland is a producer of roses, tulips, gerberas, chrysanthemums, *Anthurium* and also *Dianthus caryophyllus*. Royal FloraHolland reports 27 hectares of carnations in Poland in 2015-2016. Polish production of cut flowers is becoming more professional and with the help of modern greenhouses and lighting the growing season is extended. In contrast with many other European countries, production of cut flowers in Poland has increased both in area and in production value over the past decade. The production value of cut flowers is much larger than the import value.

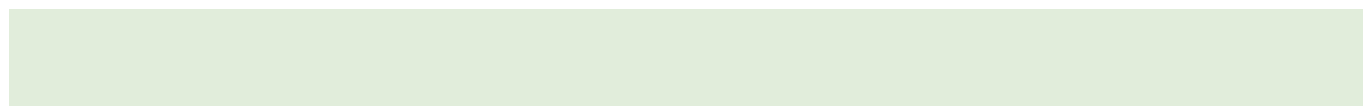
The total consumer market for cut flowers and foliage in Poland is estimated at about €736 million in 2013 and has grown since to an estimated €800 million in 2015 (Source: FloraHolland/Bureau Sierteelt). Per capita that amounts to a little over €20. Most flowers are sold in florists and street market stalls. But the supermarket channels is gaining market share fast. The growth of the supermarket channels is expected to continue. Other smaller sales channels include sales directly from the grower and via the internet, but these have very small market shares at the moment.

Besides a whole range of smaller supermarket chains, the most import supermarkets and hypermarket chains in Poland in terms of total sales value are Biedronka (discount supermarket), Lidl (discount supermarket), Auchan (hypermarkets), Tesco (hypermarkets and supermarkets), Kaufland (hypermarkets), and Carrefour (hypermarkets and supermarkets). Smaller supermarket chains include Polomarket, Intermarché (hypermarkets and supermarkets), and Netto. Most of these chains sell an assortments of flowers containing both mono-bunches and simple bouquets. Roses, Chrysanthemums, Gerberas, Tulips and Carnations are among the most sold cut flowers. Żabka, Lewiatan, Abc and Groszek (Eurocash), and a number of other retailers are mostly focusing on smaller convenience food stores and do generally not sell flowers on a regular basis yet.

With growing incomes, Polish consumers buy flowers more often for their own use and on impulse than a decade ago, when 70% of the flowers were bought as a gift. In comparison to other European countries, in Poland, flowers are sold more often as single stems (19% of the volume in of transactions in 2012) and mono-bunches (41%). Polish consumers are known to be keen on quality as well as price sensitive. In a country where abundant local production is of good quality, consumers tend to be more choosy.

Carnations are traditionally an important flower in Poland, as a present on e.g. Women's Day (March 8). Other special holidays in Poland on which flowers are given as a gift are Grandmother's Day and Grandfather's Day, Mother's Day (May 26), and e.g. Teacher Appreciation Day (September 14 in Poland). Special Name Days are celebrated much like birthdays and popular names can cause quite a surge in the sales of flowers. With All Saints (November 1) flowers are used to decorate the graves of deceased loved ones. Red carnations (along with red roses) are also associated with international Labour Day (May 1).

Although carnations were considered a bit of an old-fashioned flower and associated with the old communist times, the image of carnations is improving. Breeders have also introduced many new varieties in more fashionable colours. Carnations are used a bouquet fillers but are also appreciated in their own right and valued for their long vase life and large variety of colours and appearances.



Tips:

- Demand for cut flowers in Poland is growing and the market is gradually shifting towards flowers for personal use. Trends in home decoration and fashion are becoming more important determinants of demand. Find out which specific colours and varieties your prospective buyers are looking for by contacting your buyer or visiting trade fairs.
- The Netherlands remains an important supplier of the Polish market. Dutch traders and import agents have a great deal of experience in facilitating flower trade from developing countries to Poland.
- If you focus on the florist sales channel, the Dutch flower auction Royal FloraHolland is usually a good way to start trading. The traders active on the flower auction have lots of experience in redistributing carnations to florists all over Europe including Poland. If you wish to supply to Polish supermarkets instead, finding a trade partner that has experience in supplying Polish supermarkets is very important.
- The Dutch wholesalers and importers association is called VGB. Visit their [website](#) for more information on Dutch wholesale traders.
- Build sustainable partnerships based on trust, compliance and professional business conduct and communicate pro-actively.

3. Which trends offer opportunities on the Polish market for cut carnations?

You can find more information on general trends and developments on the European market for cut flowers in [CBI Trends](#).

Growing demand for cut flowers

The Polish market for cut flowers is growing. This is caused by growing incomes as well as a general preference for quality flowers and attention to home decoration and luxury products. This has already resulted in the establishment in 2016 of a new Trade Fair in Poland dedicated to flowers, the [Flower Expo Poland](#) which is held in combination with the GREEN IS LIFE Expo in Warsaw. Visiting the Trade Fair is an excellent opportunity to find out about the latest trends, meet the competition and potential buyers.

Growing market share of supermarkets and direct trade

Direct trade between producer and (exporting) wholesale trader in Europe, bypassing the Dutch flower auction, is increasing. Wholesale traders set a wide variety of buyer requirements (based on the requirement set by their client) that may deviate from the general auction requirements. The market share of supermarkets in Poland is increasing. This offers opportunities for exporters from developing countries that want to target the unspecialised supermarket channel.

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 them. Requirements often differ per supermarket.
- Payment terms are creating problems throughout the entire cut flowers value chain. Supplying via the Dutch flower auction means you will definitely receive your money. Payments are wired to your account soon after so you don't have to wait longer (between 30 and 60 days). Try and make clear agreements with your wholesale trader on payment terms.

Poland is a florist country

Although the supermarkets are winning market share, florists are still the most important outlet in Poland. For special varieties and higher segment flowers, specialised flower shops generally offer more opportunities than large retailers. Supplying the florists will usually be best achieved through the specialised (Dutch) wholesaling exporters, who buy flowers at the Dutch Flower Auction or directly from you as an exporter.

4. What requirements should cut carnations comply with to be allowed on the Polish market?

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

Plant health

Cut carnations exported to Poland and the EU in general, must comply with the 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.

Tips:

- Check with the relevant [national plant protection organisation](#) (NPPO) for the exact procedures to obtain the phytosanitary certificate.
- A model phytosanitary certificate can be found in [Annex VII](#) of the Plant Health Directive.

Carnations imported in the EU must be accompanied by an official 'phytosanitary certificate' guaranteeing the phytosanitary conditions of plants and plant products, and also 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 if your country and the country you want to export to have implemented digital services to facilitate the import and export process. For example, in Holland there is the [CLIENT export](#) system, which is also used by the Kenyan and Ugandan inspection authorities.
- [Main Inspectorate of Plant Health and Seed Inspection](#) (PIORN) is the government body for phytosanitary inspections in Poland, and operates on the request of the importer. Note that there are a limited number of points of entry to Poland for inspections. These are listed on the website of [PIORN](#).
- Read more about [plant health](#) in the EU Export Helpdesk.

Intellectual Property Rights (IPR)

Developing new carnation varieties is 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 called royalties. In recent years, there has been an increased focus on breeders' rights and illegal products are rejected from the market.

Tips:

- Make sure you only buy plant material from approved agents that have an official agreement with the

dealer so that royalties are paid.

- 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.

Full overview of requirements for cut carnations:

For a list of requirements for cut carnations consult the [EU Export Helpdesk](#) where you can select your specific product under chapter 06031200.

Tip:

- 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 \(CPVO\)](#).

What additional requirements do buyers often have?

CSR - Corporate Social Responsibility and Sustainability

Despite the rapid development of the Polish economy and retailers' and consumers' growing attention towards the environment and social welfare, there is still little concern for sustainability in the Polish flower market. Sustainability logos are rarely used on the consumer market for cut flowers, including carnations.

In line with increasing attention to corporate social responsibility amongst large retailers in the rest of Europe, larger Polish retail chains that operate internationally are expected to demand that suppliers increasingly adhere to some kind of environmental and social standards in the future. [GLOBALG.A.P.](#) is a B2B scheme that is widespread elsewhere in the EU, originally focussing on Good Agricultural Practices. Although not yet extensively used in the cut flower trade, it is gaining in importance. This is especially true when selling to supermarkets, which is a dominant trade channel for cut carnations.

Tips:

- If you do not have a sustainability certification, do not invest in any specifically if you aim to enter the Polish market. The demand for products with such labels is still very low.
- If you already have a sustainability certification, use it and your good practices in communication with your (potential) buyers. This might create trust and awareness, and thus competitive advantage.
- There is an abundance of standards to choose from (although the actual criteria show many similarities). To determine which scheme you should follow, the market you are targeting will probably be decisive (e.g. which country do you want to export to and which trade channels do you use?). The [ITC Standards Map](#) provides information on various standards and certification schemes.
- Anticipate increasing attention to corporate social responsibility at large Polish retailers in the future. Check widespread schemes in other parts of the Europe, such as [GLOBALG.A.P.](#) The latter gives an overview of all standards for flowers and ornamentals.
- If you want to target supermarkets directly, check which sustainability criteria they impose. 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 carnations. 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

Standards that are communicated through a consumer label still represent a very small part of the market in Poland. Contact [Fairtrade Poland](#) to find out about the latest developments in the Polish market for Fairtrade flowers.

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 for cut carnations.

5. What competition do you face on the Polish cut carnations market?

Colombia is the main supplier of carnations from developing countries. It reported 1106 hectares of carnations in 2015–2016 (Source: Royal FloraHolland). Colombia is known for its high-quality standard and spray carnations. It produces year-round with a peak in October, and a large variety of colours and diversity in appearance. Other important suppliers in the European market are Kenya, Turkey and Spain. Turkey and Kenya are the most important suppliers after Colombia in terms of volume.

Kenya had 200 hectares of carnations in 2015–2016. It focuses mainly on large flower standard carnations, grown at higher altitudes and competes with Colombia in terms of quality. Its production is year-round although volumes are higher in winter than in summer.

Total European production of carnations (including Turkey and Russia) was valued at €187 million in 2015 (Source: Royal FloraHolland). Spain is the biggest producer of carnations in the EU with reports of 340 hectares of carnations in 2015–2016. However, Spanish carnations growers, like the Dutch, are suffering a major decline in numbers and area of production. The Spanish production season peaks between April and July. Turkey is also an important producer of carnations. It is improving its quality and focuses on supplying retailers in Germany and the United Kingdom directly, as well as the Dutch auction. Turkey offers a variety of popular standard and spray carnations. Carnations are a major horticultural product in Turkey. Turkey supplies the European market mainly in September and from December to May. Competition from Ethiopia and Morocco is also increasing. The European market for carnations (both standard and spray carnations) is very competitive.

Supply from the Netherlands has decreased, as the number of growers and the production area have declined greatly. Just 12 specialised carnation growers remain. They mainly produce high-quality standard carnations and focus on large assortments of special varieties. Dutch carnations are produced year-round with a peak in April and May.

More information about competition on the EU cut flower market can be found in general information on

6. Which channels can you use to put cut carnations on the European market?

In Poland the florist channel is the most important sales channel. These stores are supplied by both local wholesalers and growers (often located at wholesale markets/cash-and-carry's) as well as by exporters/wholesalers from the Netherlands. These specialised wholesalers and cash-and-carry's source an important part of the flowers at the Dutch flower auction Royal FloraHolland. However, the direct trade channel is an important trade channel for carnations from developing countries.

The characteristics of the market channels and segments on the European market for cut flowers and foliage are described in the general information on [Trade channels and market segments for cut flowers and foliage](#).

7. What are the end-market prices for cut carnations in Poland?

Carnations are mostly sold as mono-bunches and in bouquets. Consumer prices differ depending on the outlet, the occasion and time of year. In Poland, a bouquet of 18 spray carnations (50 cm) sells for about €3.50 at the supermarket (discount). At the flower shop or when mixed with other flowers in a bouquet, consumer prices may be higher. The figure below gives an estimation of the price breakdown. This breakdown indicates value-added and gross margins in the different parts of the supply chain.

8. Useful sources

Export and market entry support:

- CBI - <http://www.cbi.eu/>
- CBI Market Information - <https://www.cbi.eu/market-information/>
- EFSA - <http://www.efsa.europa.eu/en/>
- EU Export Helpdesk - <http://exporthelp.europa.eu/thdapp/index.htm>
- ITC Market Access Map - <http://www.macmap.org/>
- PIORN Main Inspectorate of Plant Health and Seed Inspection- <http://piorin.gov.pl/en/>

Certification schemes:

- Fairtrade - <http://www.fairtrade.net/>
- GLOBALG.A.P. - http://www.globalgap.org/uk_en/
- ITC Standards Map - <http://www.standardsmap.org/>

Marketing and trade standards:

- EU legislation on organic production - http://ec.europa.eu/agriculture/organic/eu-policy/legislation_en
- UNECE standards for cut flowers - http://www.unece.org/trade/agr/standard/flowers/flower_e.html
- VBN Dutch Flower Auctions Association - <http://www.vbn.nl/>
- VBN product specifications - <http://www.vbn.nl/en-US/Productinfo/Pages/Productinformations.aspx>

Statistics and sector information:

- AIPH - <http://www.aiph.org/>
- Eurostat - <http://ec.europa.eu/eurostat/data/database>
- ITC Trade Map - <http://www.trademap.org/>
- UN Comtrade - <http://comtrade.un.org/>

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