

Exporting roses to Italy, France, Spain, Portugal, Greece, Malta and Cyprus

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Italy, France and Spain are large consumer markets for cut flowers in southern Europe. Traditional flower shops and street markets dominate the flower retail landscape. After years of recession, southern European flower sales are clearly growing. In 2015, the total imports of cut roses amounted to €255 million, mainly imported through the Netherlands. The market growth and the importance of cut roses in the southern European cut flower market make these countries an interesting export opportunity for exporters of cut roses from developing countries.

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1. Product description

The rose (*Rosa*) is a woody perennial plant of the genus *Rosa* in the Rosaceae family. Roses are a very popular cut flower in Europe. Cut roses vary in size from the large and intermediate Hybrid Tea to the 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 document covers the southern European market, more specifically Cyprus, France, Greece, Italy, Malta, Portugal and Spain. These countries all use the common European currency of the euro.

 Cut red roses. Source: Shutterstock.

The Dutch flower auction ([Royal FloraHolland](#)) is the main marketplace for cut flowers in Europe. Specific requirements for quality, size, packaging and product information are set by the [Dutch Flower Auctions Association](#). These requirements are widely adopted as minimum requirements across the entire cut flower chain and must be met by growers to sell at the auction. The Dutch flower auction is an important trade platform for flowers that are eventually sold on the southern European market.

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. The quantity of roses in these boxes is increasing to reduce costs. As a result, the quality requirements for the export boxes increase, because roses have to stay in the boxes for a longer period.

Roses that are supplied to the auction 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 southern 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 is often required for direct trade. The barcode and/or QR code, article code, selling price and other details required by the buyers should already be printed on labels.

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

Tips:

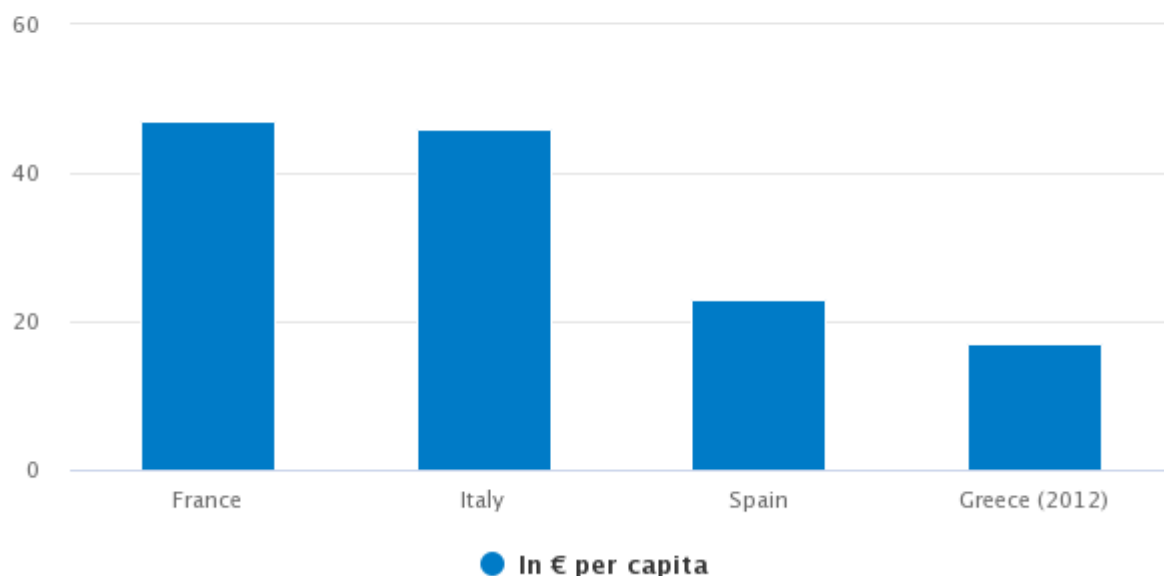
- Visit the [VBN](#) website regularly to find out about changes in product specifications.
- Contact your import agent or your potential client about any additional requirements if you wish to supply directly to the European import market, bypassing the Dutch flower auction.
- If you supply via the 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.

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

The consumption of cut flowers in southern Europe varies between €15 and €45 per capita. France and Italy have a relatively high consumption level per capita. In Spain, Portugal and Greece, consumers spend a little bit less on flowers. France (67 million inhabitants), Italy (61 million) and Spain (46 million) are the largest markets for cut flowers in southern Europe. Greece and Portugal are equally large with about ten million people. Cyprus and Malta are small island states with fewer than a million inhabitants.

After a long period of slow economic development, income and consumer demand has finally been picking up in southern Europe since 2015. Especially in Spain, there are signs of economic improvement.

Figure 1: Consumption of cut flowers in France, Italy, Spain and Greece



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

Peak days are important in southern European countries, with days such as Mother's Day and Valentine's Day boosting flower sales. Catholic holidays such as Easter also have a significant impact on flower sales in these traditionally catholic countries.

Tips:

- Consider using the market knowledge and network of the Dutch exporting wholesalers specialised in supplying to the southern European market. Find them through the [Dutch wholesalers association VGB](#), the Flower Auction [Royal FloraHolland](#) or trade fairs.
- If you want to focus on **peak days**, take these dates into account when you make your annual production planning.

The local production of roses has declined strongly. Italian production of cut roses was about 200 hectares in 2016. Spain had about 314 hectares of rose production in 2013, exclusively produced for the domestic market. France is also producing roses, while rose production in the Netherlands declined from 1,000 hectares in 2000 to only 238 hectares in 2016. In addition to the local production of roses, there is also a considerable production of other flowers in Europe such as tulips and summer flowers, which compete with roses especially in spring and summer.

Tip:

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

Imports of cut roses to the southern European market increased from €228 million in 2011 to €255 million in 2015. About 15% of the total imports came from developing countries, mostly imported to Spain. Within the southern European market, France (135 million) and Italy (68 million) are the largest importers of cut roses.

Spain imported €39 million, while the other countries Portugal, Greece, Malta and Cyprus are much smaller importers.

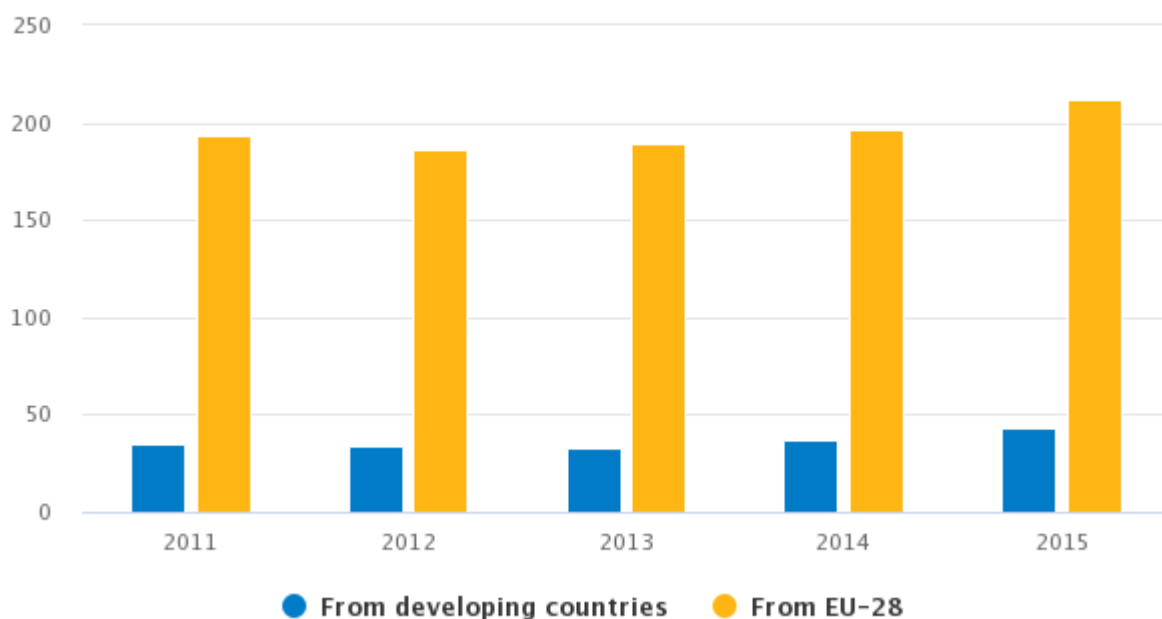
The Netherlands is by far the largest supplier of cut roses to the southern European market. France and Italy in particular import large quantities of roses from the Netherlands. The direct import share from developing countries remains low except for Spain, which imports roses directly from Ecuador and Colombia. Small amounts of roses are being imported from Kenya, Ethiopia and some other countries.

Tips:

- The Netherlands is an important trade hub for cut roses. If you want to supply to the southern European market, consider trading via the Dutch wholesale industry. They have experience in supplying to countries in southern Europe.
- Visit your buyers or meet them at trade fairs to build trust and commitment.
- Monitor your buyers' satisfaction and always be honest and direct in case of supply problems or questions.

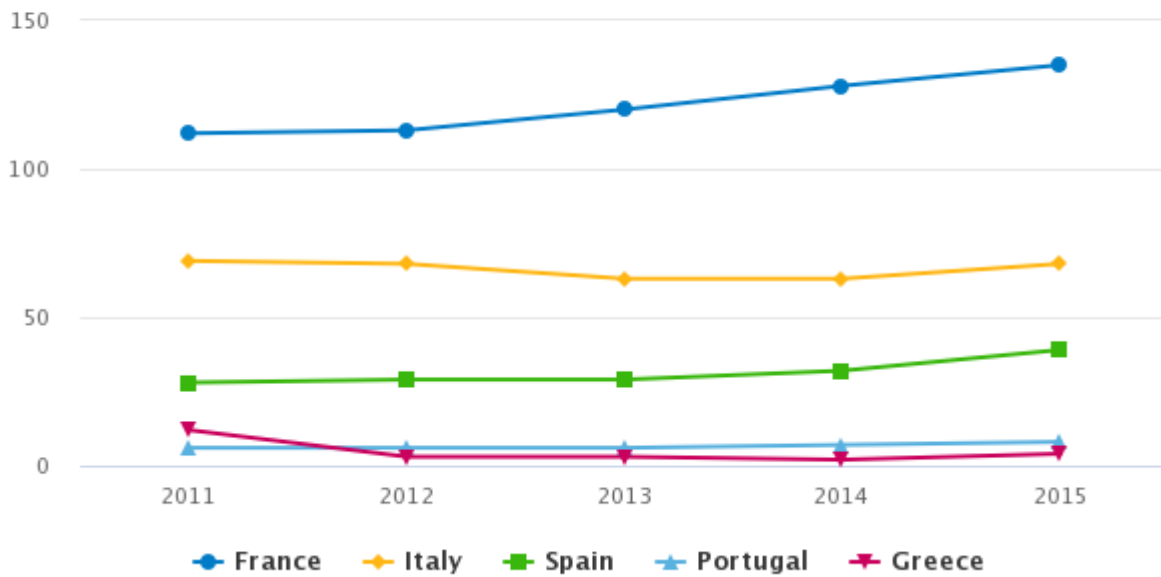
You can find monthly and annual import statistics on the [Eurostat website](#).

Figure 2: Import of cut roses in Southern Europe



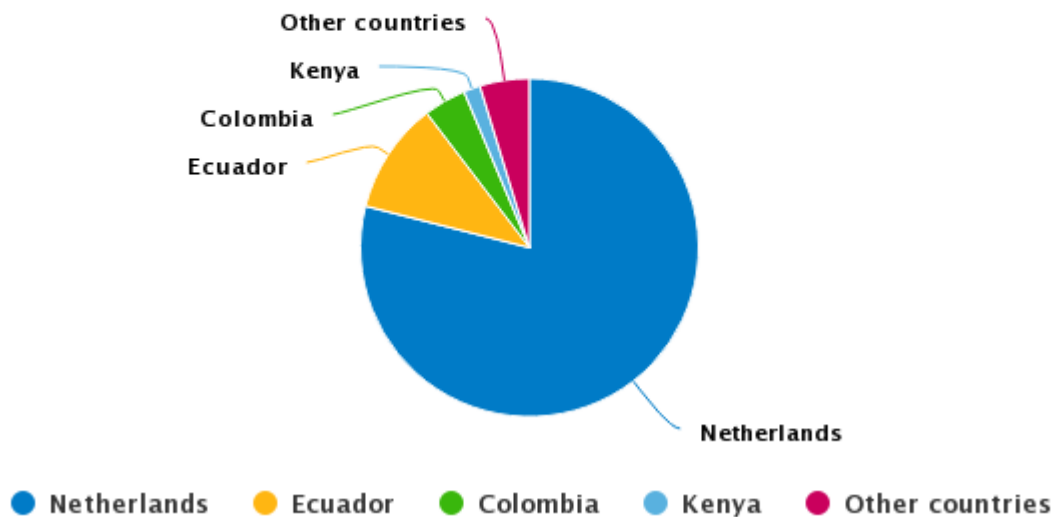
Source: Eurostat Comext, calculations Wageningen Economic Research.

Figure 3: Import of cut roses by importing country in Southern Europe



Source: Eurostat Comext, calculations Wageningen Economic Research.

Figure 4: Division of the import value of cut roses in Southern Europe per supplying country (in 2015, in %)



Source: Eurostat Comext, calculations Wageningen Economic Research.

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

The economic recovery and the increasing share of roses in the imports of cut flowers are some of the most important trends for cut roses in southern Europe. See our study of [Trends for cut flowers and foliage](#) for more general trends in the European market for cut flowers.

Signs of economic recovery in southern Europe

After almost ten years of economic crises and slow growth, there are some signs of economic recovery in southern Europe. Especially in Spain and Portugal, the economy grew by about 4% in 2015. Although growth is still below the European average, we expect the market to recover further in future.

The share of roses in imports is growing

The share of cut roses in the imports of cut flowers to Southern European countries increased from 35% in 2011 to 42% in 2015. This development is partly caused by increasing prices of roses, as well as by a change in the assortment offered to consumers. The increase in the sales via supermarkets is also increasing the demand for cut roses.

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

The legislative and common buyer requirements for cut roses on the southern European market are the same as for the rest of the European Union (EU).

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

Plant health

Roses imported to southern Europe 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. and MPS certification

Compliance with environmental standards (focusing on Good Agricultural Practices, pesticide use and water use) is a common requirement in southern European supermarkets. Large supermarket chains such as Carrefour are especially stringent and require certified sustainable production from their suppliers. In France, over a hundred growers are MPS certified, indicating the relevance of the scheme in the French market. The number of certified growers is also growing in Italy.

The GLOBALG.A.P. standard for cut flowers addresses issues on Plant Protection Products, energy efficiency, responsible water use, pollution control and social practices. GLOBALG.A.P is gaining importance in the cut flower industry as a minimum requirement for growers. Especially supermarkets are increasingly demanding GLOBALG.A.P. Several other standards are benchmarked against GLOBALG.A.P.

The MPS organisation offers several standards, of which MPS-ABC certification covers environmental performances and is considered a must for growers which are also benchmarked with GLOBALG.A.P.. 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:

- [GLOBALG.A.P.](#) gives an overview of all the standards for flowers and ornamentals.
- More information about [MPS](#) can also be found in the [ITC Standards Map](#).
- 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.

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

The local production of cut roses is decreasing, but significant amounts of locally produced roses and other flowers are still on the market in southern Europe in spring and summer. The local production of flowers is especially large in France, Spain and Italy. Nevertheless, the local production is decreasing and cannot supply enough to fulfil demand.

Tips:

- Try not to compete on price alone, but build partnerships with buyers and strive for excellent product quality.
- See our study of [Competition for cut flowers and foliage](#) for more information.

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

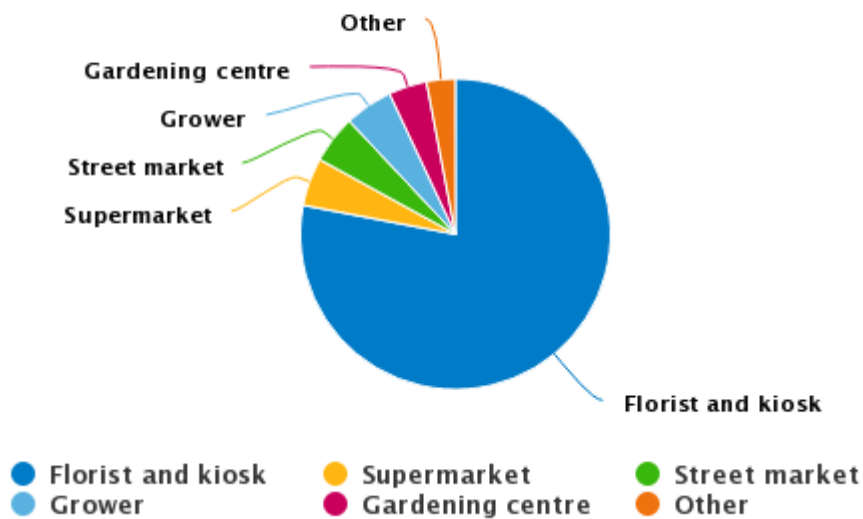
Southern European markets have many common features and are still dominated by florist shops and street markets (both specialised flower retailers). Roses for these shops are often supplied via the Netherlands. The Dutch wholesale traders are experienced in supplying to Italy, France, Spain and the other southern European countries. These traders either buy their flowers at the Dutch auction, or they source directly from producers in Europe or in developing countries.

After arrival in the Netherlands, flowers and foliage are distributed all over Europe. Traditionally, flowers are transported to wholesale markets in France, Italy and Spain for further distribution. However, more and more retailers source directly via the auction and skip these intermediate markets.

In southern Europe, most consumers buy flowers in traditional flower shops such as florists and kiosks. The supermarkets have a relatively low market share. Only in France, the share of supermarkets and hypermarkets is a bit higher at 14%. Because traditional florist shops have a high market share in southern Europe, there is a very fragmented distribution network with low volumes delivered to numerous shops.

Between 40-50% of consumers in southern Europe buy their flowers as mixed bouquets, often including fillers and foliage. The share of bouquets has increased in recent years. Flowers are a popular gift item in southern Europe (also for special holidays such as Mother's Day and Valentine's Day).

Figure 5: Market share for cut flowers per sales channel
Spain
(in 2013, in %)



Source: Royal FloraHolland/Bureau Sierteelt.

Tips:

- Direct imports from developing countries are limited. More professional and experienced exporters from developing countries are advised to contact the larger traders in southern Europe (examples for Italy are Barile and Flowers Express), or to contact one of the regional business support organisations via the CBI website to obtain additional market insights and contacts.
- Use the extensive network of the Dutch flower industry and auction, as major importers in southern Europe mostly source from Dutch companies.
- See our study of [Trade channels and market segments for cut flowers and foliage](#) for more information.


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


A bouquet of 21 long-stemmed roses or a bouquet of 40 short roses sells for about €30 to €40 in the French florist channel. In Italy, roses are much more expensive in the florist channel, with a bouquet of 12 long roses and foliage selling for €80 or more.




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