

# Exporting carnations to the United Kingdom

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Imports of carnations (*Dianthus*) in the United Kingdom are €59 million in 2015. The United Kingdom is an important market for carnations from developing countries. Colombia and Kenya are the main suppliers from developing countries. Although carnations have been gradually losing market share they are still an important cut flower, both as bouquet filler and as cut flower in its own right.

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## 1. Product description

Carnations are commonly referred to by their scientific name *Dianthus*. Carnations are perennial herbaceous plants, which are native to Eurasia or the Mediterranean region. They 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

The main sales channel for carnations in the United Kingdom is not the Dutch flower auction but direct sales from European wholesalers and exporters from developing countries. Large supermarkets have a particularly high market share in the United Kingdom. Key product specifications may differ between the direct trade channel and the auction. Nevertheless, the Dutch flower auction ([Royal FloraHolland](#)) is the main marketplace for buying and selling cut flowers in Europe, and its general product specifications for carnations and other cut flowers are widely recognised in the trade. As these product specifications are well documented, we will use them as references here. Please bear in mind that individual buyers may have other requirements. There are specific requirements regarding quality, size, packing and information on the product set by the Dutch Flower Auctions Association ([VBN](#)) in agreement with growers and traders for all flowers traded at the flower auction. These requirements, which are widely adopted as minimum requirements across the entire cut flower industry including flowers in the direct trade channel, are listed below.

*Quality and grading:* Cut carnations may be traded at the auction if they meet 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 that 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 details given below only represent a brief 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.

Growers are responsible for grading their products through self-assessment, and for the reliability of the information they provide with each lot at the Dutch flower auction. However, the auction monitors customers' claims for refunds to check supplier reliability. Such claims may for example 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 8 weeks. Information on your QI, including the number and content of product refund claims, is shared with customers and reported back to you. 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;
- packed per bunch in a hot needle-perforated sleeve.

Standard carnations (disbudded with large single flower) must be:

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

Other carnations must be:

- supplied in bunches of 10 stems;
- 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.

An increasing number of growers from developing countries export directly to the United Kingdom without using the auction clock. Dutch wholesale traders are also increasingly trading flowers from developing countries directly with retailers in United Kingdom. In general the principal product requirements given above are also applicable on the direct market. Supplying directly to the United Kingdom can be more demanding in terms of additional retail requirements. Retailers often request a constant supply of flowers over a fixed period. In addition, payment terms differ from the flower auction and payment periods can be longer.

### **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 the United Kingdom an interesting market for cut carnations?**

The United Kingdom, with some 64 million inhabitants (about 13% of the EU total) is a major market for cut flowers. The consumers in United Kingdom spend about €45 per capita per annum on cut flowers. Carnations are estimated to make up around 10% of cut flower sales in the United Kingdom, on the basis on import statistics. It is expected that the market for cut flowers in the United Kingdom will grow moderately in the next 5 years.

Carnations are mostly sold as mono bunches or in bouquets. They are also sold as single flowers, e.g. to wear in a buttonhole as a corsage. Carnations are available in many colours. The most popular colours are red, pink, and white, as well as bi-colour and flecked flowers. Other colours include yellow, purple, salmon, fuchsia and light green.

Peak days are very important in the United Kingdom. Mother's Day, for example, is of great importance. This is held on the fourth Sunday of Lent. It is exactly three weeks before Easter Sunday and usually falls in the second half of March or at the beginning of April. Students at Oxford University traditionally wear a white carnation for their first examination, a red carnation for their final and a pink carnation for all other examinations.

In the majority of European countries cut flowers are sold mainly via flower shops. Only in the United Kingdom are the majority of flowers sold via supermarket retail. British consumers buy their flowers mainly in supermarkets (56% in 2013) and florist shops (28%). Supermarkets take a greater share of the market than in other European countries.

### Tips:

- The majority of British consumers buy flowers in the supermarket. In order to supply this channel make sure you comply with the specific requirements set by every supermarket retailer.
- There is an increase in low cost promotional bouquets sold in supermarkets.
- If you want to focus on a peak day, take these dates into account when you make your annual production schedule.

Imports of cut carnations in the United Kingdom increased slightly between 2011 and 2012 and then showed a decline up to 2015. The total import value was €59 million in 2015. But the drop in value was combined with higher average prices in euros. Carnations make up about 8% of total cut flower and foliage imports in the United Kingdom. Carnations have lost market share, mainly to cut roses, over the past 25 years. Nevertheless, carnations are still an important cut flower on the British market. The United Kingdom is the most important EU importer of cut carnations (28% of all imports by individual EU countries, including intra-EU trade).

The direct import of carnations from developing countries in the United Kingdom is decreasing. The import of carnations via the Netherlands has more than doubled since 2009. This implies that exports of carnations from Colombia to the United Kingdom are more often routed via the Netherlands; this conclusion is supported by the trade statistics. The Netherlands, Spain and Kenya are the most important suppliers of carnations in the United Kingdom by volume. In terms of value, the Netherlands, Colombia and Kenya are the biggest suppliers.

### Tips:

- For supplying the United Kingdom, consider exporting via the Dutch wholesale traders. About 44% of carnations are supplied via Dutch sales channels.
- Information about wholesale traders in the United Kingdom can be found through the [United Kingdom Flower Wholesale Trade Association](#).
- Trading directly as a supplier from a developing country with the United Kingdom is challenging since additional requirements are set with respect to quantity, quality and production. Producers are often asked to produce large quantities with a consistent quality that often exceeds legal and auction requirements.
- Prior experience in supplying a market directly is essential in order to be successful in direct trade with buyers from the United Kingdom. A newcomer to the United Kingdom might consider joining up with more experienced exporters in order to establish a network.

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

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

#### *Increasing demand for socially responsible and sustainably produced cut flowers in the United Kingdom*

There is an increasing demand for socially responsible produced flowers in the United Kingdom. Social standards like Fairtrade, ETI or MPS-SQ for supplying the mainstream supermarket retailers are increasingly demanded. Consumers in the United Kingdom are frontrunners regarding flowers grown under environmentally-friendly conditions. Supermarkets in the United Kingdom have played a particularly important role in introducing additional requirements. Important aspects are MRLs, labour conditions at farm level and greenhouse emissions during production and transport.

As a result, 60-70% of the flowers sold via the supermarket channel are Fairtrade. This continues to be the focus of many supermarkets. All major retailers in the United Kingdom have their own private label for sustainable products (e.g. Tesco Natures Choice). In many cases, these unilateral retailer codes are based on one or a combination of industry standards.

#### **Tips:**

- Many EU retailers are starting to demand social standards, like Fairtrade 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.
- Many retailers in the United Kingdom require certain environmental standards are met, like MPS-ABC. Retailers often ask for a variety of certificates. Find out which retailers are asking for which combination of certification schemes and how you can comply.
- For more information about flowers that are grown in an environmentally-friendly manner, under acceptable working conditions, check websites such as [MPS](#) and [Fair Flowers Fair Plants](#).
- Compliance with these schemes should not be taken lightly. Audits take place on a frequent basis.

#### *Longer vase life*

Consumers in the United Kingdom often demand quality flowers with a 7-day guarantee. Good quality is important in every market channel, including the low priced flowers offered in supermarkets. Carnations are cut flowers that are particularly valued for their long vase life, which can last up to 14 days. A vase life of 7 days is often regarded as a minimum.

#### **Tip:**

- A long vase life is essential in order to supply the EU market successfully. So make sure that the product is cut while the buds are not fully open and are 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. Although Dutch traders play an important role in the distribution of carnations from suppliers from developing countries such as Columbia to the United Kingdom, Colombian growers also export directly to importers in the

United Kingdom that specialise in supplying Colombian flowers to the big retail chains. Wholesalers have their own requirements (based on the requirements set by their clients) that may differ from the general auction requirements.

### **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.

### *Increasing competition in a slowly growing market*

Despite limited consumption growth on the European market, various Latin American (mostly Colombian) flower exporters are looking for an alternative market as demand in Russia is declining due to the economic downturn in that country. Imports from Africa are also increasing. There is increasing rivalry on the European market. As consumption is not expected to grow very fast in the next five to ten years, this is expected to put downward pressure on prices of carnations. On the other hand, there is less competition from European carnation growers; carnation production in Europe has declined fast as production has shifted mainly to Colombia.

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

There is an increasing need for information sharing between grower and trader for tracking and tracing purposes. ICT is becoming more important in the sales process. Wholesale traders connect their clients to an online shop to create real-time insights into available stock.

### **Tips:**

- Explore technological opportunities related to information sharing and tracking and tracing. Radio-frequency identification (RFID) technology e.g. is used to monitor product quality along the supply chain and provides valuable information that you can use to further optimise your distribution.
- Online shop: Stocks are increasingly held at suppliers (upstream) with integrated stock management systems. This requires growers and exporters to respond quickly and efficiently to orders.

## **4. With which requirements must cut carnations comply to be allowed in the United Kingdom?**

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

Plant health

Cut carnations exported to the EU, 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.

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

EU consumers are paying more and more attention to social and environmental circumstances during the flowers' production. 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 pesticide and water use) is a very common requirement, while social conditions are gaining importance.

The most important B2B scheme for carnations is [MPS](#). MPS ABC certification covers environmental

performances and is considered a must for growers. Furthermore they have several other schemes such as MPS-SQ (focusing on social issues), MPS-GAP (on Good Agricultural Practices) and MPS-Quality. The most comprehensive scheme is MPS-Florimark, which is a combination of the aforementioned four schemes.

[GLOBALG.A.P.](#) is a B2B scheme originally focussing on Good Agricultural Practices. Although not yet extensively used in the cut flower trade, it is gaining in importance, especially for sales to supermarkets, which is a dominant trade channel for cut carnations. MPS GAP, KFC Silver Standard (Kenya Flower Council), EHPEA Code of Practice for Sustainable Flower Production - Silver Level (Ethiopian Horticulture Producer Exporters Association), are officially recognised as equivalent to GLOBALG.A.P, whereas [Florverde ® Sustainable Flowers](#) (Asocolflores Colombia) is recognised as a similar certification scheme.

### 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 the future.
- 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 you are targeting will probably be decisive (which country do you want to export to and which trade channels do you use?)
- See our study on [Market 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.
- [GLOBALG.A.P.](#) gives an overview of all the standards for flowers and ornamentals.
- Check for existing initiatives in your country. Examples are the Colombian [Florverde ® Sustainable Flowers](#) standards or the code of the [Kenyan Flower Council](#). Sometimes these local initiatives are benchmarked against GLOBALG.A.P. and/or MPS.

### Private labels

The increasing share of the 'unspecialised' market (supermarkets etc.) in comparison with the 'specialised' market has also had its effects on buyers' requirements. Several supermarket chains offer carnations under their own private labels often referring to social and environmental conditions at the production level. This is a very common feature in supermarkets in the United Kingdom.

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 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

Although CSR requirements are common buyer requirements, standards that are communicated through a consumer label still represent a relatively small part of the market. The United Kingdom is however one of the major markets for Fairtrade flowers and the segment is expected to grow. Examples of relevant consumer labels are: [Fair Flowers Fair Plants \(FFP\)](#) and [Fairtrade International](#).

### Tips:

- Always check with your buyer whether they requires certification and which certification they prefer.
- Consult the [Standards Map database](#) for the different labels and standards relevant for cut carnations.

Organic

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

### Tip:

- Growing organic carnations could represent an opportunity in the future.

## 5. What competition do you face in the British 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 produce mainly 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 [Competition for cut flowers and foliage](#).

## 6. Which channels can you use to put cut carnations on the United Kingdom market?

Carnations are mainly traded directly, though the Dutch flower auction remains an important channel for market access. The characteristics of the market channels and segments 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 the United Kingdom?

Carnations are mostly sold as mono bunches and in bouquets. In the United Kingdom, a bouquet of 15 medium single bud carnations sells for about £15 to £20 (€19.50 to €26) at the florist shop. A bunch of 11 stems of spray carnations sells for £2 (about €2.40) at Aldi in the United Kingdom. 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.

Figure 4: Price breakdown

## 8. Useful sources

Export and market entry support:

- CBI - <http://www.cbi.eu>
- CBI Information on EU Buyer Requirements - <https://www.cbi.eu/market-information/>
- DEFRA Procedure for Electronic Application for Certificates from the Horticultural Marketing Inspectorate - <http://ehmipeach.defra.gov.uk>
- EFSA - <http://www.efsa.europa.eu/en/>
- EU Market Access Export Helpdesk - <http://exporthelp.europa.eu/thdapp/index.html>
- ITC Market Access Map - <http://www.macmap.org/>

Certification schemes:

- Ethical Trading Initiative - <http://www.ethicaltrade.org/>
- Ethiopian Horticulture Producer Exporters Association - <http://www.ehpea.org/>
- Fair Flowers Fair Plants - <http://www.fairflowersfairplants.com/home-en.aspx>
- Fairtrade - <http://www.fairtrade.net/>
- Florverde® Sustainable Flowers - <http://florverde.org/>
- GLOBALG.A.P. - [http://www.globalgap.org/uk\\_en/](http://www.globalgap.org/uk_en/)

- ISEAL Alliance - <http://www.isealalliance.org/>
- ITC Standards Map - <http://www.standardsmap.org/>
- Kenya Flower Council - <http://kenyaflowercouncil.org/>
- MPS - <http://www.my-mps.com/en/>
- Rainforest Alliance - <http://www.rainforest-alliance.org/>

Marketing and trade standards:


- EU legislation on organic production - [http://ec.europa.eu/agriculture/organic/eu-policy/legislation\\_en](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](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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