

Exporting roses to the United Kingdom

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The United Kingdom is a major market for cut flowers in Europe, with consumption exceeding €2.5 billion per year. Imports of cut roses increased from €161 million in 2011 to €182 million in 2015 (25% of the total imports of cut flowers). Although the majority of cut flowers are imported via the Netherlands, direct imports from developing countries are increasing. Roses are the most important cut flower in the United Kingdom. A large market share of supermarkets, and a focus on quality and sustainability, make the United Kingdom an interesting market for professional exporters from developing countries.

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Product description

The rose (*Rosa*) is a woody perennial plant of the genus *Rosa* in the Rosaceae family. 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](#)) 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 the United Kingdom 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;
- Prelabelled price information.

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 UK market, bypassing the Dutch flower auction.

1. What makes the United Kingdom an interesting market for cut roses?

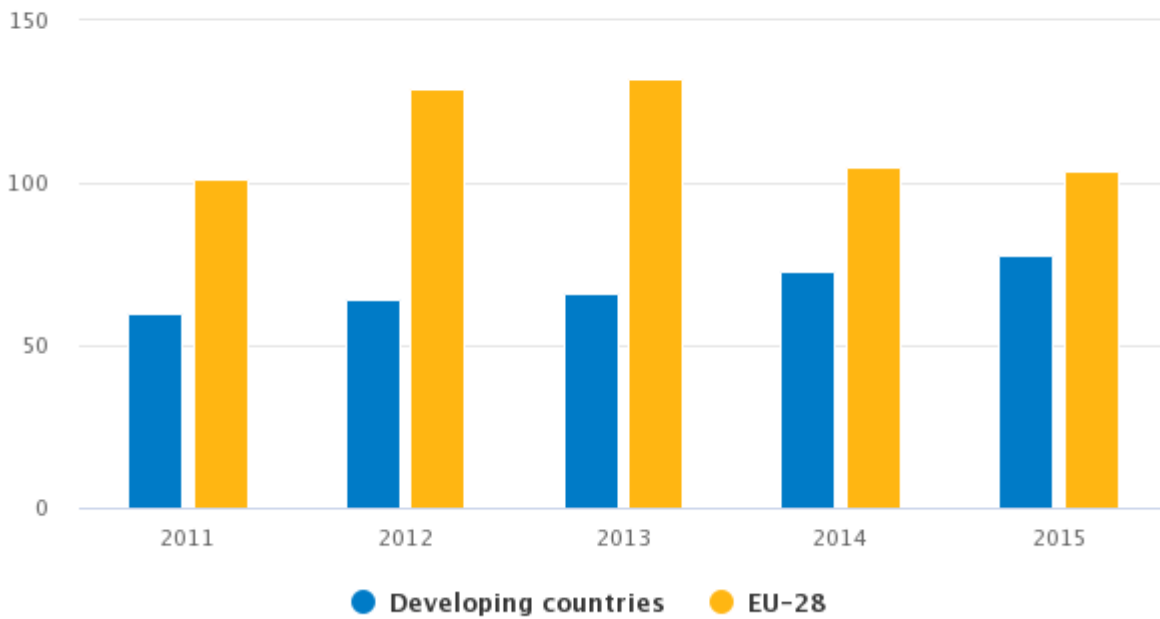
As can be derived from [CBI Trade Statistics for cut flowers](#) and foliage, the UK market is one of the largest markets for cut flowers in Europe. No specific data are available for the consumption of cut roses in the United Kingdom. The consumption of cut flowers in general increased slightly from €2.480 million in 2009 to €2.520 million in 2013, but more recent data are lacking. The consumption of cut flowers in the United Kingdom is expected to show limited growth in the next five years. The United Kingdom showed some steady economic growth after the financial crisis in 2009, but recent growth forecasts have been adjusted downward due to the decision of the United Kingdom to leave the European Union (British exit or "Brexit").

Peak days are very important in the United Kingdom. Mother's Day, for example, is of great importance to the sales of cut flowers. This day 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.

Tips:

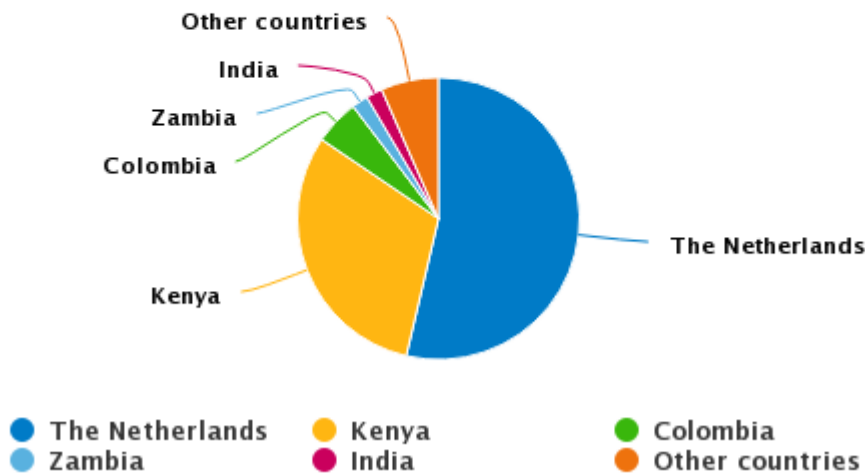
- The majority of British consumers buy flowers in the supermarket. To supply to this channel, make sure that you comply with the specific requirements set by each supermarket retailer.
- Due to the importance of the supermarket channel for buying flowers, there is an increase in low-cost promotional bouquets sold in supermarkets.
- If you want to focus on peak days, take these dates into account when you make your annual production planning.
- Quality and freshness are very important in the United Kingdom. Excellent postharvest processes and logistics are crucial.

Figure 1: Imports of cut roses in the United Kingdom



Source: Eurostat Comext. Calculations Wageningen Economic Research.

Figure 2: Division of import value of cut roses (intra- and extra-EU trade) in the United Kingdom, by exporting country (in 2015, in %)



Source: Eurostat Comext.

Imports of cut roses showed a rise during four consecutive years after the economic crisis in 2009, but fell again in 2014. In 2015, the UK import value of cut roses increased again to €182 million. The 2016 decision of the United Kingdom to leave the European Union (Brexit) has not yet had a major effect on the imports of cut flowers and foliage.

The largest share of imports comes from the Netherlands, but direct trade from developing countries is increasing. The value of exports from the Netherlands in particular has been falling since 2013. The number of roses imported from developing countries increased from 402 million stems in 2012 to 482 million stems in

2014, with average import prices of about 15 euro cents per stem in 2014. The value of imports from developing countries increased by 23% between 2012 and 2015.

While the Netherlands has a 77% market share of the cut flowers imported to the United Kingdom, its market share of cut roses was somewhat lower, amounting to 54% in 2015. This reflects the relative importance of direct trade from developing countries. Large supermarkets have a high market share in the United Kingdom and are often supplied directly from developing countries. One reason for this, aside from speed and costs considerations, is that UK retailers are front runners in selling socially responsible and sustainably grown flowers.

Many UK retailers have their own private labels and require their suppliers to comply with one or more standards, such as the Ethical Trading Initiative (ETI) or Fairtrade. Direct trade from developing countries with preferred suppliers lowers the costs of monitoring and facilitates a closed-chain approach. In practice, several British and Dutch traders are involved as intermediaries in this direct trade channel. Leading Dutch suppliers of flowers to the UK retail channel include [Intergreen](#) and [JZ Flowers](#), both part of the [Dutch Flower Group](#).

Tips:

- The majority of British consumers buy flowers in the supermarket. To supply to this channel, make sure that you comply with the specific requirements set by each supermarket retailer.
- The Netherlands is the most important trade hub for cut roses in Europe and has many companies with a great deal of experience in this field. If you want to supply to the UK market, consider trading via the [Dutch wholesale industry](#). Dutch wholesalers have experience in supplying to the UK market, both directly from developing countries and via the Dutch flower auction.
- [Eurostat](#) provides extensive international trade data.

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

Of all the trends mentioned in the [CBI Trends document](#), the increasing demand for socially responsible and sustainably produced flowers, the increasing attention to freshness and the increased sales through the internet are most important trends on the UK market.

Increasing demand for socially responsible and sustainably produced roses in the United Kingdom

Consumers and retailers in the United Kingdom take social issues such as labour conditions into account when buying flowers. As a result, certification schemes play an important role on the UK market. Many UK 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. In addition, many UK retailers have their own private label (such as [Tesco Nurture](#)) for sustainable products. In many cases, these unilateral retailer codes are based on one industry standard or a combination of various industry standards.

This trend is less marked 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:

- Get certified and comply with the specific requirements set by the supermarket retailer. Supermarkets often take regular standards such as MPS-A and GLOBALG.A.P. as a basis for developing their own

stricter standards. Do not simply obtain the labels but genuinely introduce sustainability and all of its aspects into your business philosophy.

- Many UK 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 by consulting the [ITC Standards Map](#) and [CBI Buyer Requirements](#).

Top quality and longer vase life

Quality is a prerequisite for supplying to the UK 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 a minimum in the UK market.

Tip:

- A long vase life is essential in order to successfully supplying to the UK 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 UK 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.

Tip:

- 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.

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 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 (www.floricode.com), 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.

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

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

Plant health

Roses exported to the United Kingdom 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. The Plant Health and Seeds Inspectorate (PHSI), part of the [Animal and Plant Health Agency \(APHA\)](#), enforces control measures and restrictions on the imports of flowers and plants to the United Kingdom. Roses imported to the United Kingdom 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.

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

UK consumers are paying more and more attention to social and environmental circumstances during the production of roses. As a result, 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.

The most important B2B 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

Several UK supermarket chains offer roses under their own private labels, which often include initiatives aimed at improving social and environmental conditions at the production level. Furthermore, importers may also participate in initiatives such as the [Ethical Trading Initiative](#) (ETI) or the [Business Social Compliance Initiative](#). 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, UK buyers' demands for cold chain protocols are growing, as are all European buyers' demands. 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.

4. 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. Examples of relevant consumer labels are [Fairtrade International](#) and to a lesser extent [Fair Flowers Fair Plants \(FFP\)](#). The market share of Fairtrade roses increased considerably in the past couple of years, particularly in the supermarket segment. The UK market is among the leaders with regard to CSR requirements and labels.

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 UK cut roses market?

Supermarkets have a larger share on the UK market for cut flowers than in other European countries. As a result, Fairtrade and social corporate responsibility standards are relatively important there. As in most European markets, the competition between suppliers is quite high and customers (especially supermarkets) are demanding. You can refer to the [Market Competitiveness information](#) available on the CBI market intelligence platform for further general details of competition on the market for fresh cut flowers and foliage.

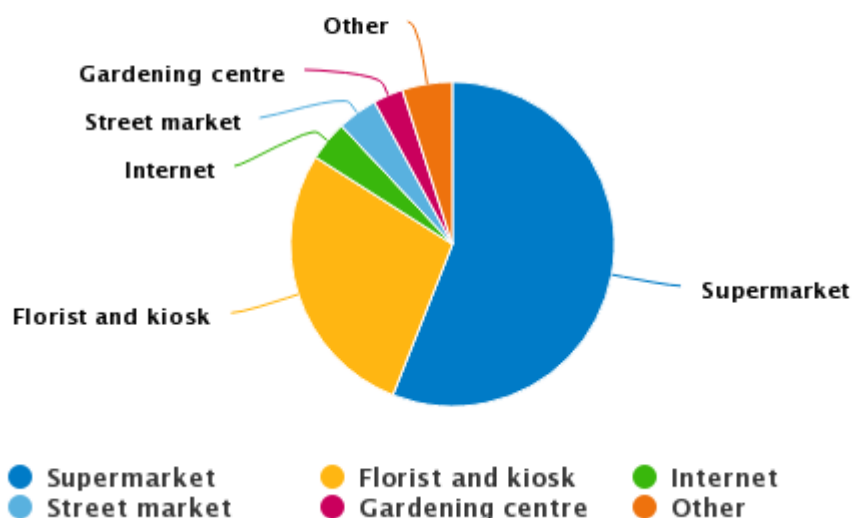
6. Through which channels can you get roses on the UK market?

The cut flower market can be divided into two market segments: specialised and unspecialised. The former encompasses all florists where flowers are the primary product, while the latter includes shops that sell flowers in addition to a range of other goods.

British consumers buy their flowers in supermarkets (56% in 2013) and florist shops (28%). Supermarkets take a greater share of the market than in other European countries. An extensive quality assortment is available in British supermarkets; some supermarkets even have quality bridal bouquets. Mono bunches of Sweetheart roses in various colours are a significant part of the supermarket assortment in the United Kingdom, but longer-stemmed roses and bouquets are also sold extensively through supermarkets.

British consumers purchase more flowers through the internet than consumers in any other European country. According to a [Royal FloraHolland market report](#), the United Kingdom is leading in terms of online sales of flowers. The so-called "box flower delivery" segment accounted for about 13% of the total sales value of flowers in 2016, a considerable increase from 2013. Consumers in the United Kingdom generally demand quality flowers with a guaranteed seven-day vase life.

Figure 3: Market share for cut flowers per sales channel in The United Kingdom
(% of expenditures in 2013)



Source: Royal FloraHolland / forecast Bureausierteelt.nl.

Supplying to the unspecialised market in the United Kingdom directly can be difficult, since retailers in this market segment set additional requirements with respect to the quantity, quality and sustainability of production. Despite the importance of suppliers from other countries, a large share of this market is handled by Dutch wholesalers, who often trade via the Dutch flower auction but also ship directly to the United Kingdom. Either way, the Netherlands remains an important country for the distribution of fresh cut roses to the United Kingdom.

The decision to leave the European Union (Brexit) will eventually require the United Kingdom to renegotiate trade agreements. This may have repercussions for some countries if preferential trade agreements are cancelled.

For more general information about market channels and segments, you can have a look at the CBI [Market channels and segments](#) document.


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


Roses are sold as mono bunches, in bouquets or as single stems. Consumer prices vary depending on the market segment and country. In the United Kingdom, a mono bunch of 15 medium-sized red roses currently sells for about €20 to €30 when bought at a florist shop. A bouquet of 15 large-bud, long-stemmed red roses sells for about €35-45. 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 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 United Kingdom (transport costs, insurance, tax and documentation costs, together with some additional charges) 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.




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