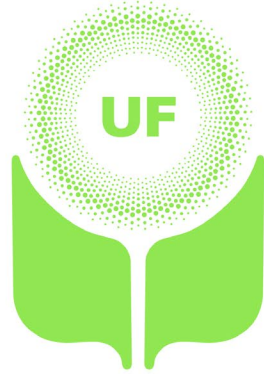


UNION FLEURS

INTERNATIONAL FLOWER TRADE ASSOCIATION

INSIGHTS INTO THE INTERNATIONAL FLOWER TRADE

**Sylvie Mamias, Secretary General
UNION FLEURS – International Flower Trade Association**



UNION FLEURS

INTERNATIONAL FLOWER TRADE ASSOCIATION

Union Fleurs is the **international umbrella organization representing and promoting the interests of national associations and companies active in the floricultural trade: wholesale, import, export, distribution** (cut flowers, foliage and pot plants).

Founded in 1959, it is based in Brussels and has nowadays members in **20 countries worldwide (in Europe, Africa, Middle-East, South and North America, and Asia)**.

Within its membership, Union Fleurs gathers **over 3.000 companies active in the trade of cut flowers and pot plants worldwide**. Members account for more than 80% of the total value of the worldwide trade of cut flowers and pot plants.

www.unionfleurs.org



UNION FLEURS

A members-driven organisation

Members in 20 countries worldwide

*** National associations of flower wholesalers & traders (export, import, wholesale, distribution)**

*** Individual companies**

Major market players represented – the Netherlands, Colombia, Ecuador, Kenya, Ethiopia, Germany, Italy, etc...

More than 3.000 companies represented within the membership, accounting for over 80% of the total value of worldwide trade of floriculture products



Union Fleurs Membership



ITALY



TURKEY

BELGIUM

AUSTRIA

DENMARK

GERMANY



KENYA



JAPAN



USA



ECUADOR



UGANDA

THE NETHERLANDS



FRANCE



MOROCCO



COLOMBIA



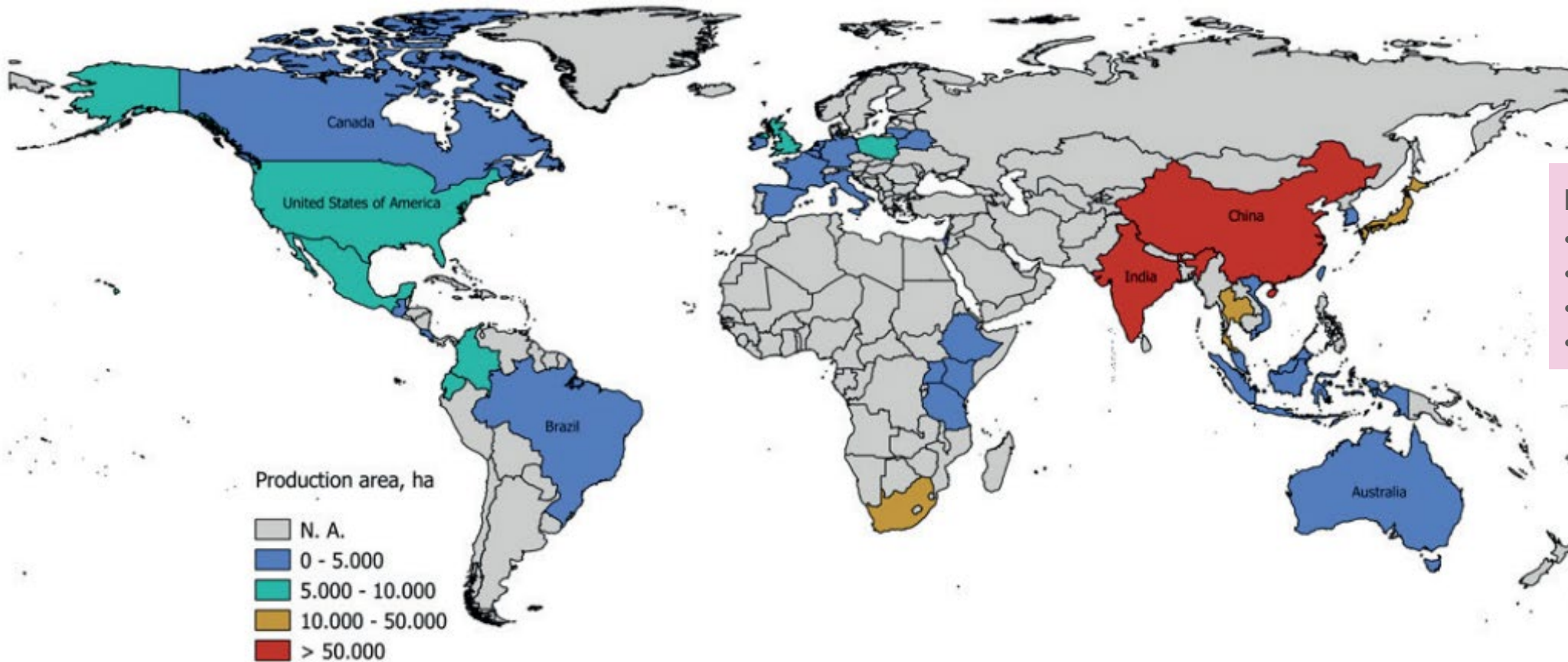
SWEDEN





KEY CHARACTERISTICS & DYNAMICS OF THE GLOBAL FLOWER INDUSTRY:

Overview – production of cut flowers:

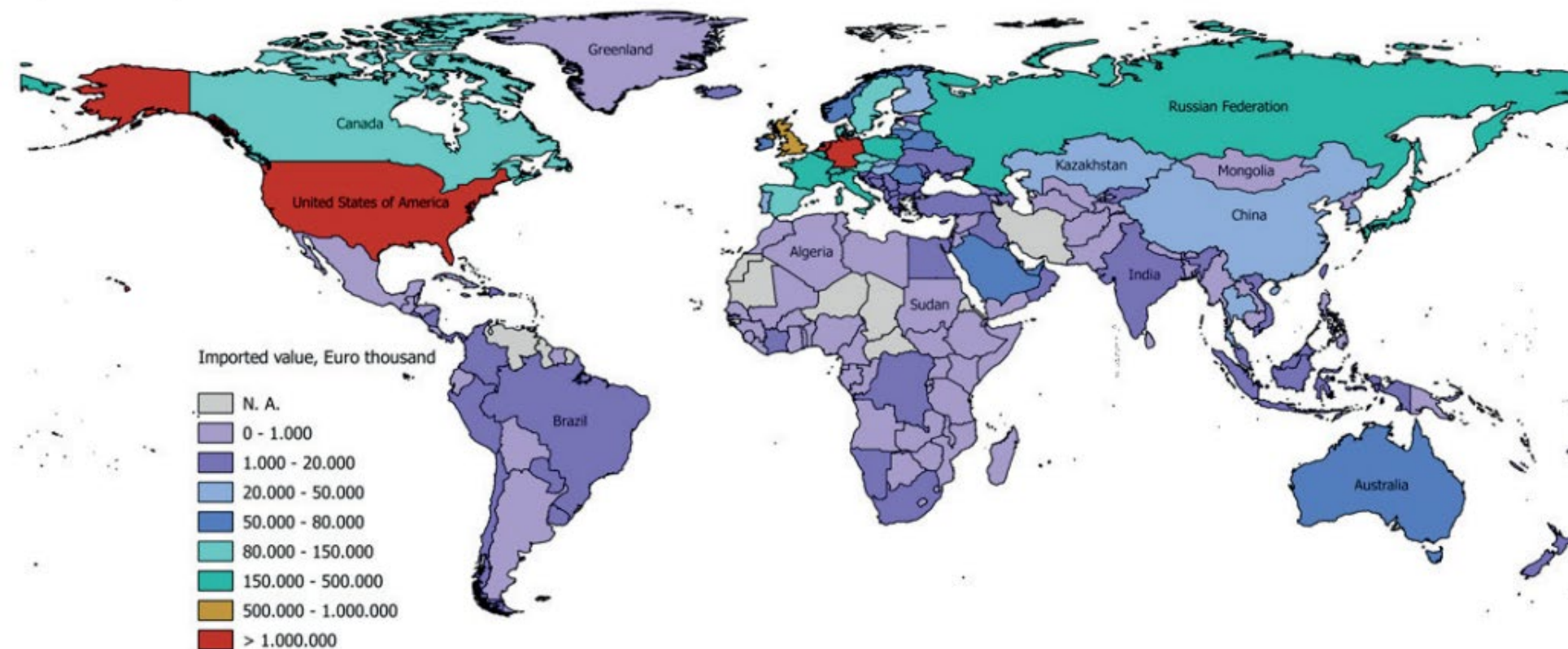


Largest production areas:

- China
- India
- Thailand
- South Africa



Overview – imports of cut flowers:

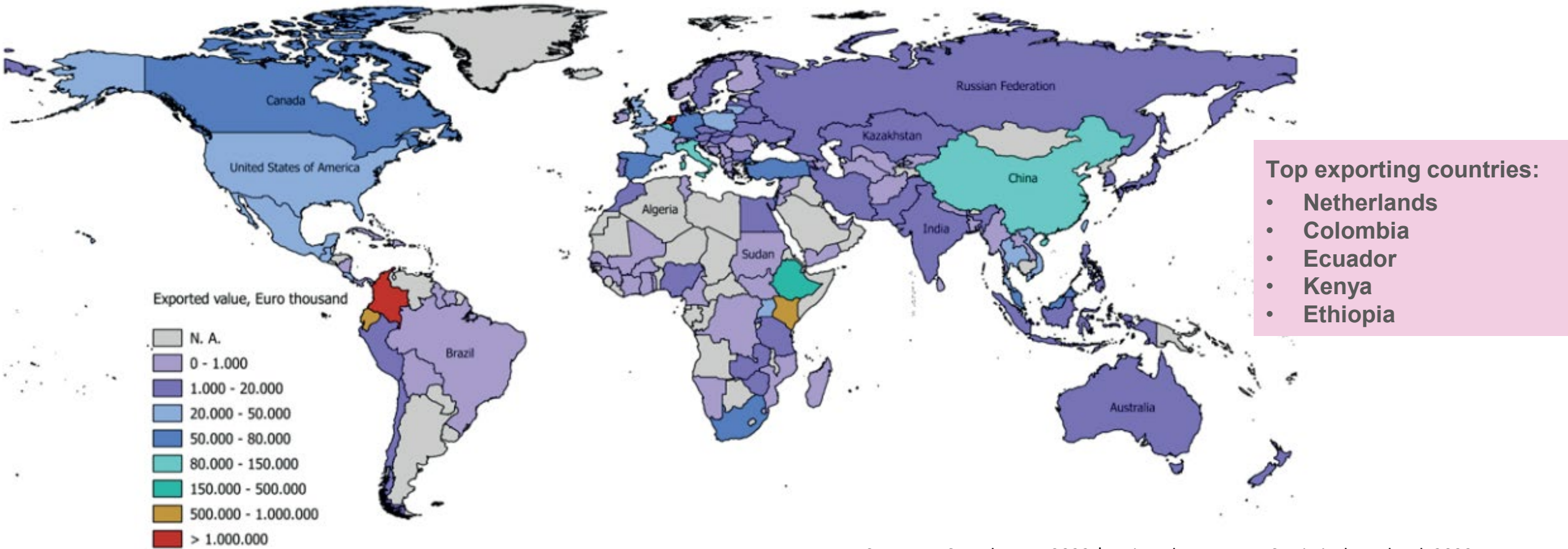


Top importing countries:

- Germany
- Netherlands
- USA
- United Kingdom

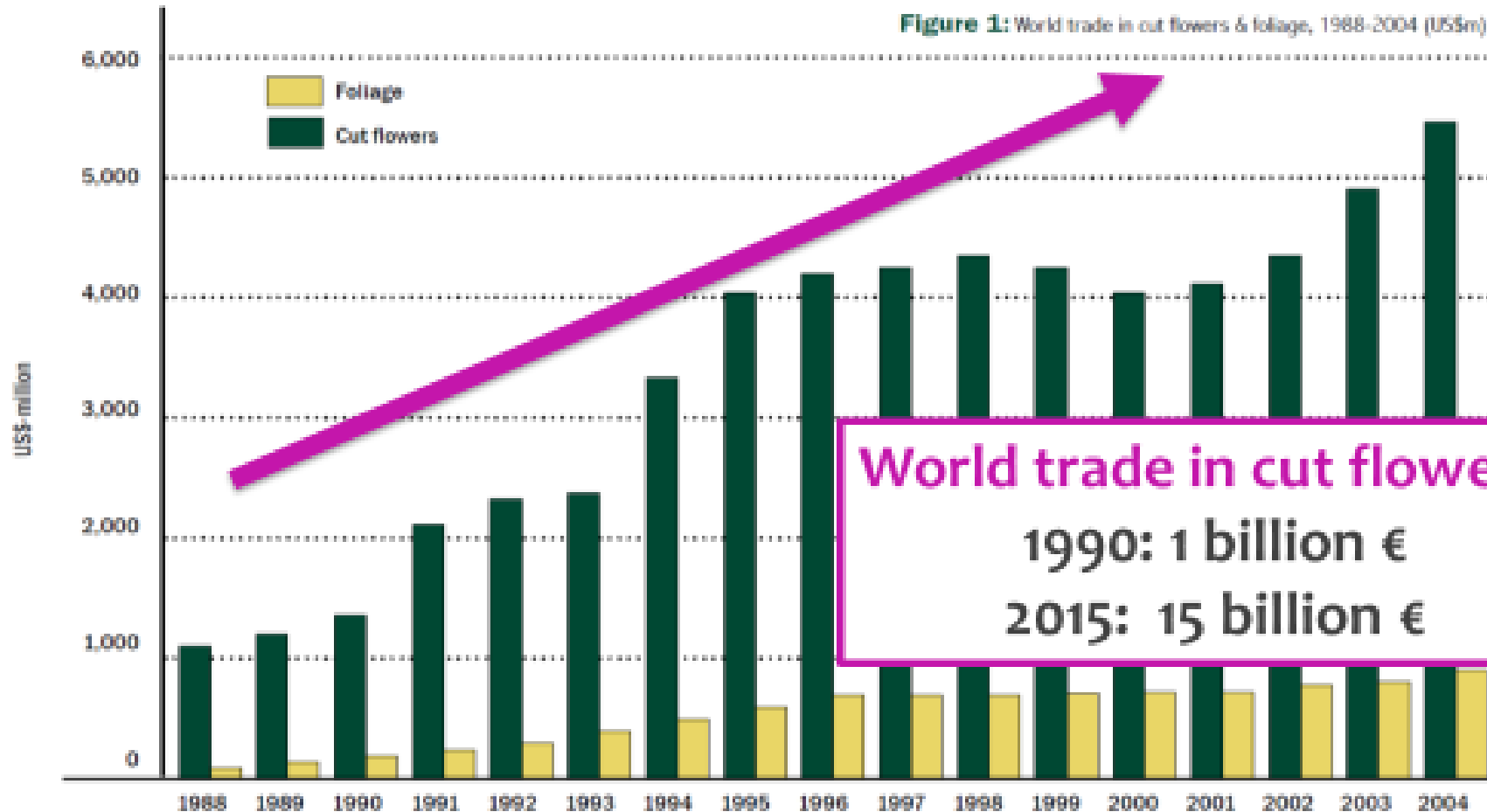


Overview – exports of cut flowers:





Major intensification and globalisation of production & trade of cut flowers since 1990s

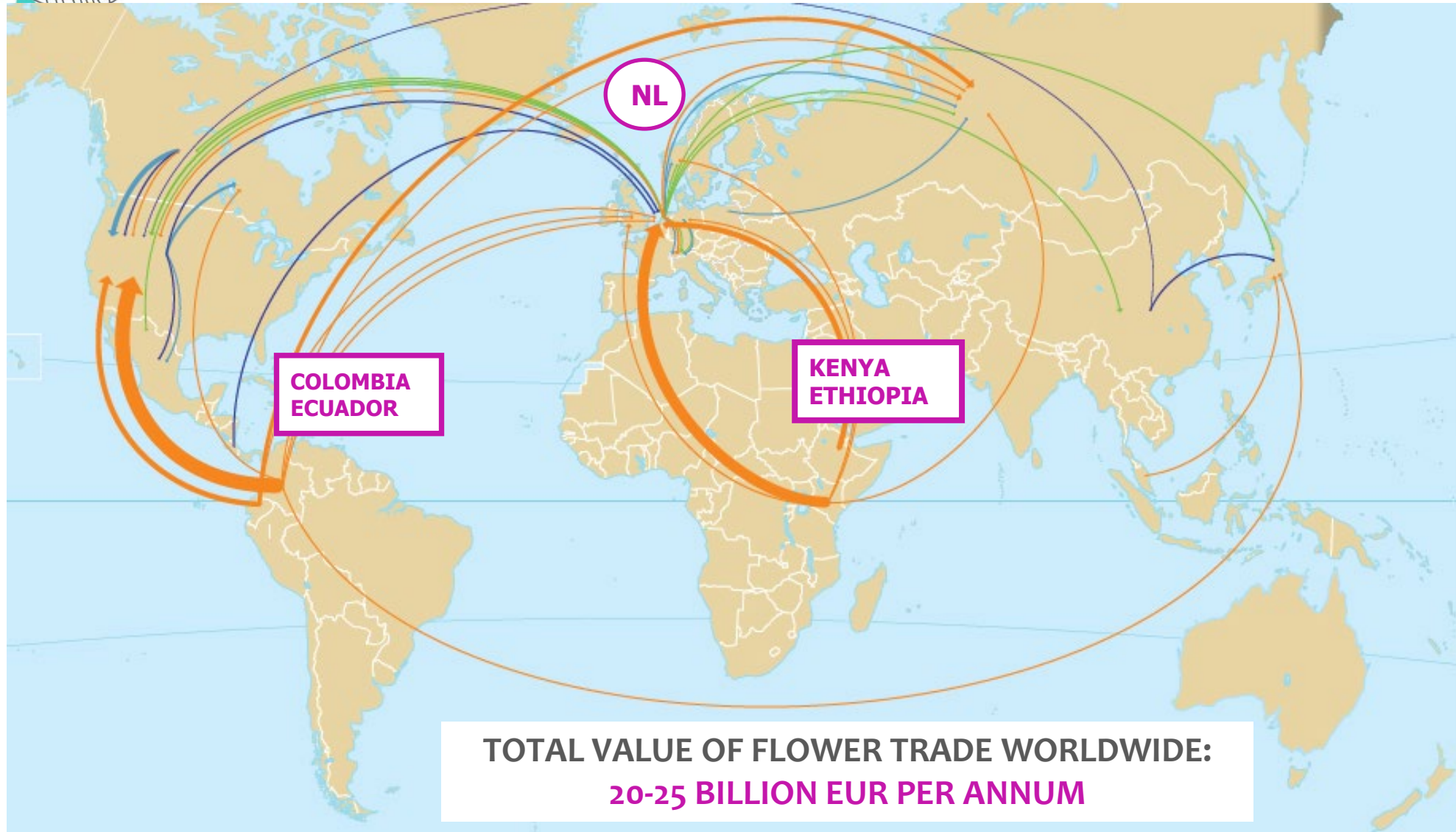


World trade in cut flowers:
1990: 1 billion €
2015: 15 billion €

Source: International Trade Centre (ITC) COMTRADE



Global trade & routes to destination markets:



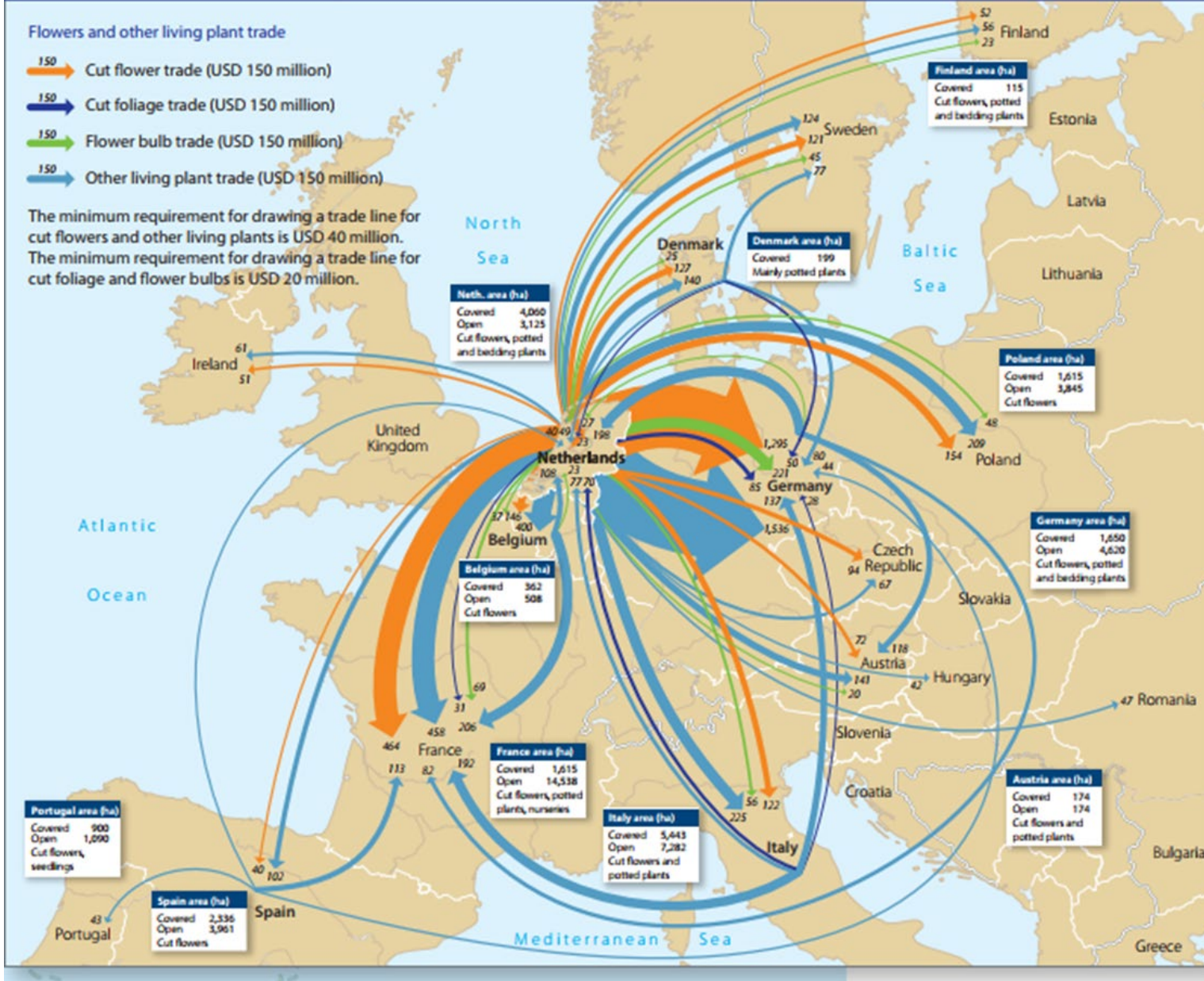


Intra-EU trade

Flowers and other living plant trade

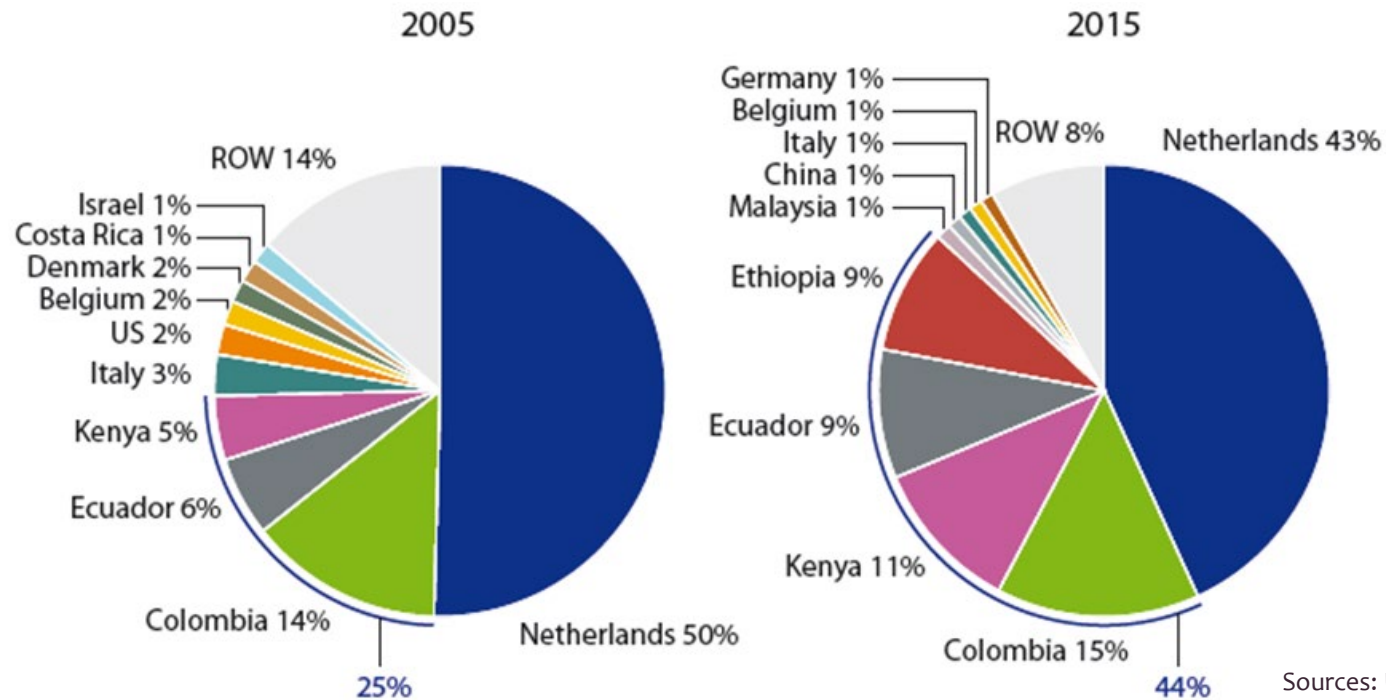
- 150 → Cut flower trade (USD 150 million)
- 150 → Cut foliage trade (USD 150 million)
- 150 → Flower bulb trade (USD 150 million)
- 150 → Other living plant trade (USD 150 million)

The minimum requirement for drawing a trade line for cut flowers and other living plants is USD 40 million.
The minimum requirement for drawing a trade line for cut foliage and flower bulbs is USD 20 million.





Key suppliers to the global flower market:



Sources: UN-Comtrade, Royal FloraHolland, Rabobank

Netherlands (43% of the global market):

- International trade center (global hub) through the Dutch flower auctions systems since 1950s
- More than 40% of the world trade transits / is re-exported via the Netherlands

4 key developing countries (44% of the global market together): Colombia, Ecuador, Kenya and Ethiopia

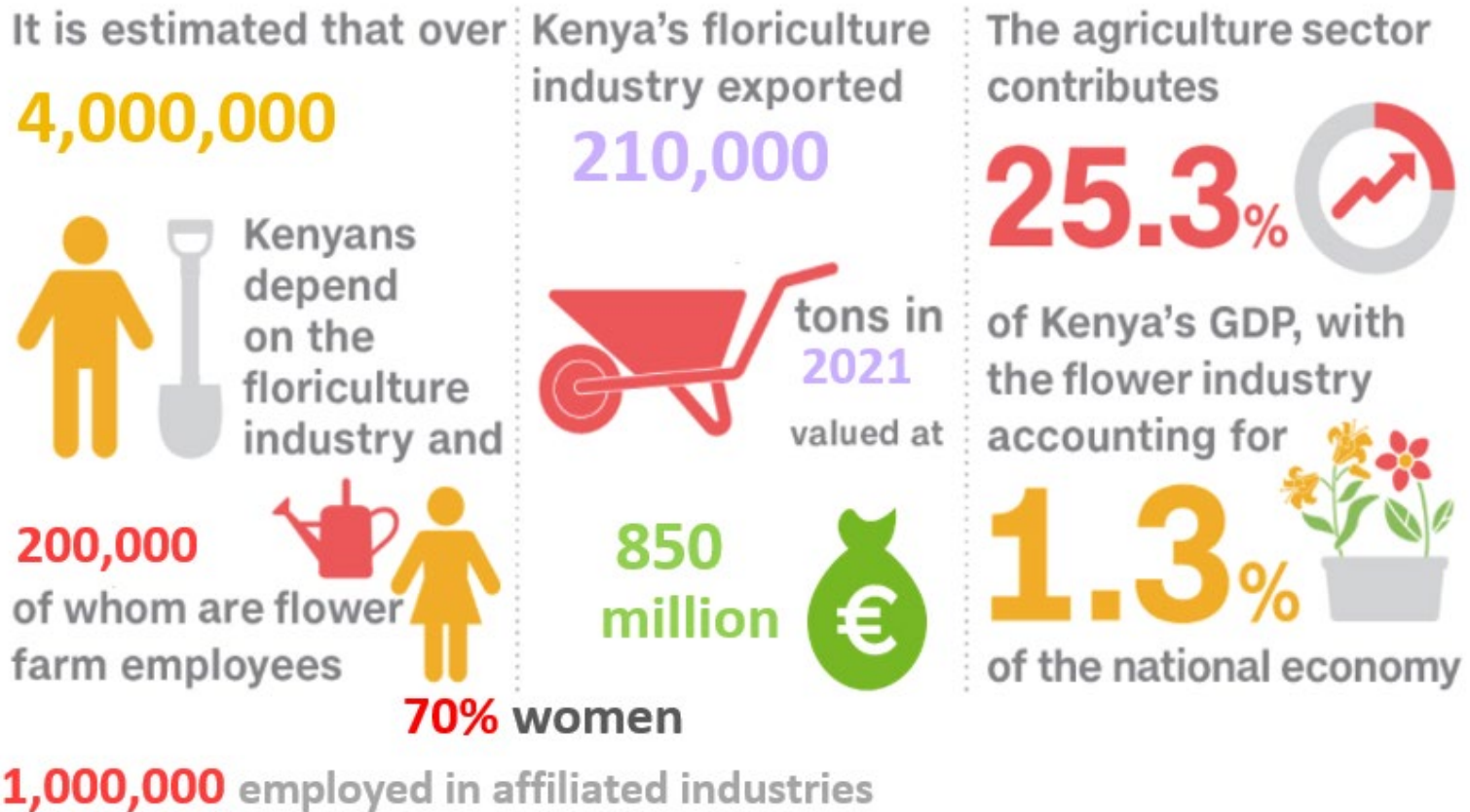
- In 10 years (2005 to 2015) they have together overcome the position of the Netherlands
- Export to more than 50 destinations in the world
- Regional powerhouses: Kenya and Ethiopia key suppliers to the European market, Colombia and Ecuador key suppliers to the US market



Socio-economic contribution of the flower industry in key supplying developing countries:

FRESH FLOWERS, BLOOMING BUSINESS

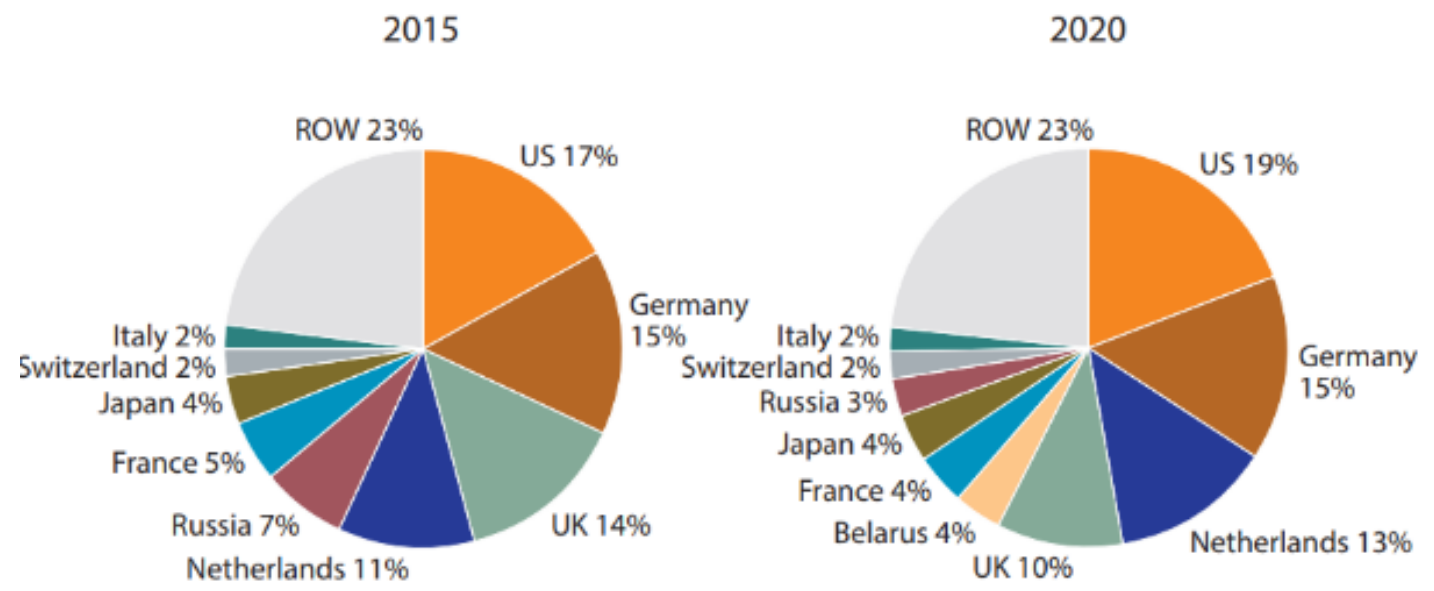
Source: Kenya Flower Council





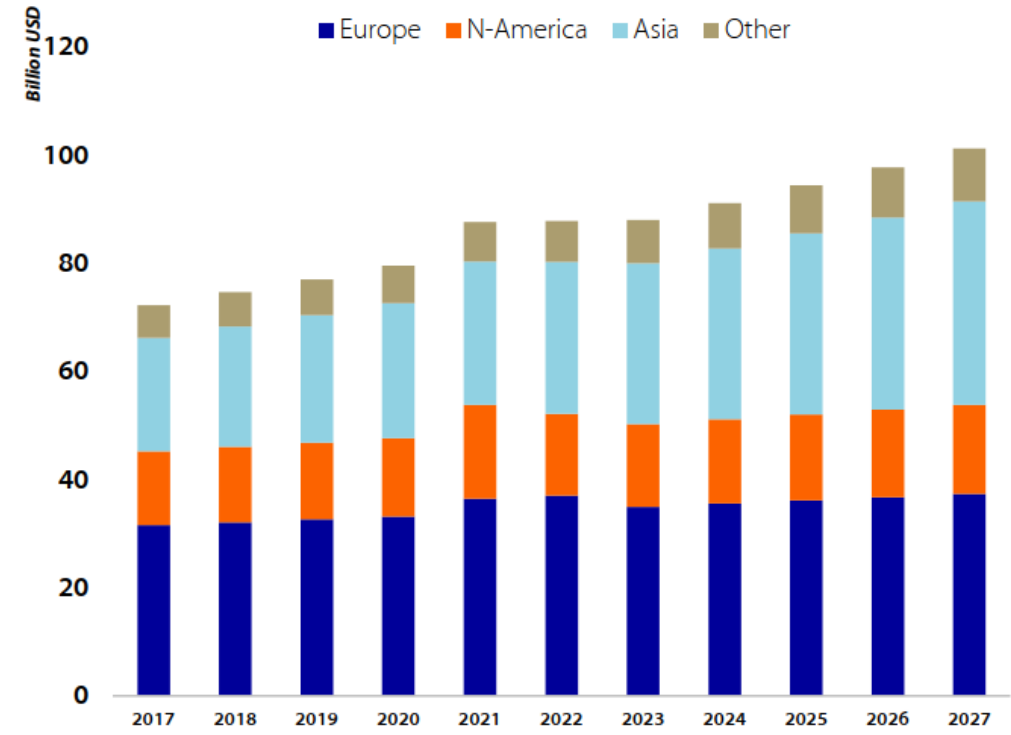
Key destination countries :

World's largest cut flower import countries, 2015 vs. 2020



Sources: UN-Comtrade, Royal FloraHolland, Rabobank

Estimated development of consumption value:



Source: Rabobank (estimates)

Flower expenditures are still very concentrated in a limited number of destination markets → **room for diversification**

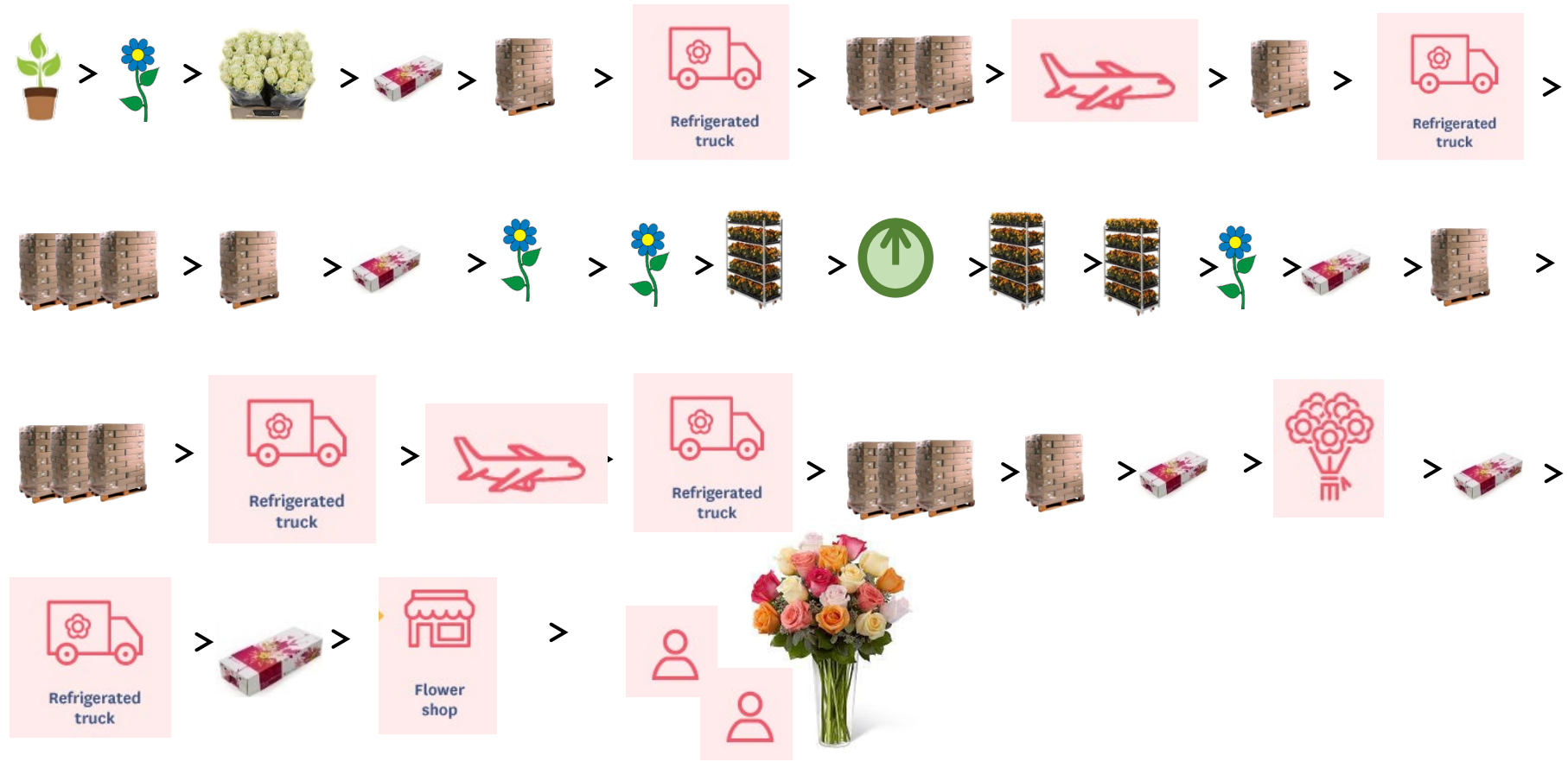


Specificities of the international flower supply chain:

- **Product characteristics:**
 - Highly **perishable** products with a short life-cycle
 - Wide **assortment** of flower and plant varieties & species
 - **All-year-round:** high demand and supply uncertainties in terms of product quantity, quality, origin and timing (influence of seasons, environmental and production conditions, market trends)
- **Peak seasons:** Springtime, Valentine's day (14 February), Mothers' day (March-May), International Women's Day (8 March)
 - Huge volumes must reach destination markets on time
 - Extreme pressure on the supply-chain and logistics during a few days of the year
- **Smooth, speedy & efficient logistics and processes** are essential along the supply chain, from origin to destination, to ensure freshness, on-time deliveries and secure growth and competitiveness
- **Cold-chain integrity and temperature management** are crucial to preserve the quality of flowers during transport and ensure vase-life at destination

The Flower Supply Chain: from blooms to bouquets

A very globalised, integrated and complex supply chain worldwide



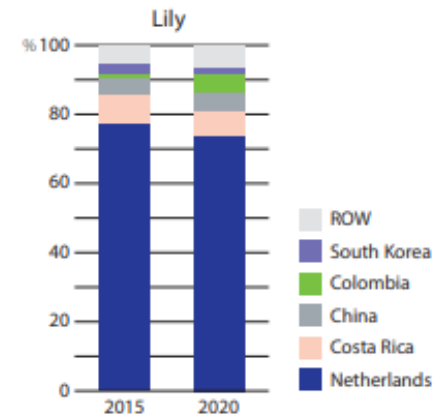
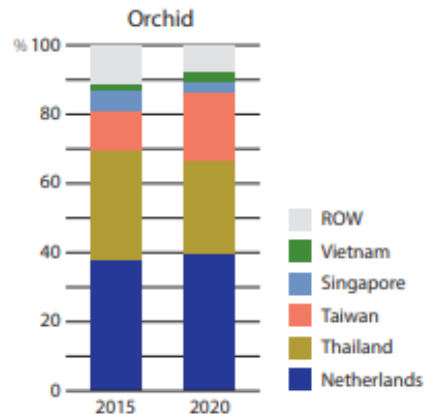
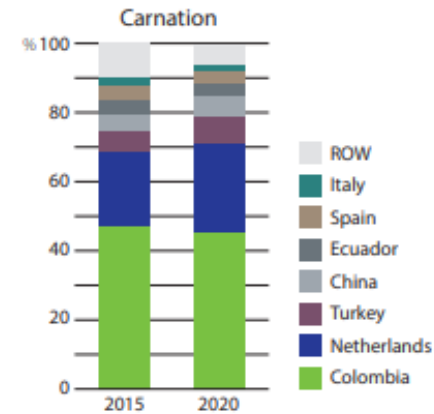
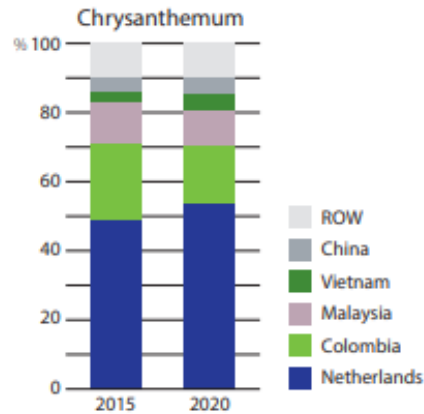
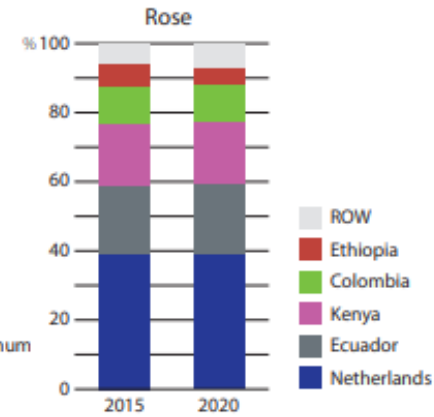
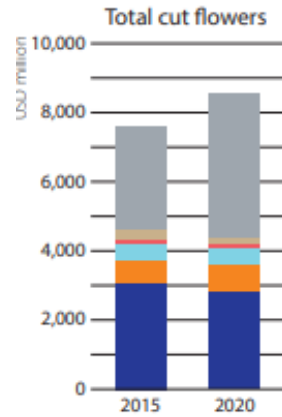
“A premium on speed”: 24 – 48 hours



FLOWER VARIETIES & QUALITY STANDARDS:

Top exported flower varieties globally:

- Rose
- Chrysanthemum
- Carnation
- Orchids
- Lily





FLOWER VARIETIES & QUALITY STANDARDS:



- **UNECE QUALITY STANDARDS (1980/1994):**

Product	No.	Published / Last revised
Cut flowers	H-1	1980/1994
Cut foliage	H-2	1980/1994
Fresh cut unifloral roses	H-3	1980/1994
Cut unifloral carnations	H-4	1980/1994
Multi-floral carnations	H-5	1982/1994
Chrysanthemums	H-6	1982/1994
Gladioli	H-7	1982/1994
Strelitzias	H-8	1982/1994

Observations:

- Limited awareness by operators of the existence of these standards
- Evolution of trade & trends since the 1990s: some varieties (gladioli, strelitzias, mimosa, carnations) are less relevant in global trade, other varieties have emerged (orchids, lilies)
- The flower industry has built on them and further developed industry standards to cover a larger number of varieties since 1990s and more detailed product specifications



FLOWER VARIETIES & QUALITY STANDARDS:



• INDUSTRY PRODUCT SPECIFICATIONS (NL/EU):



Royal Flora Holland

Supplying Buying About us Members Service & Contact

VBN product specifications

The product specifications of the VBN (Association of Flower Auctions in The Netherlands) set out the basic agreements between growers and traders for the trading of horticultural products. These agreements are kept up-to-date, accessible and available. Therefore, we regularly consult with growers and customers, and with employees of Royal FloraHolland, Rhein Maas and Plantion.



Vereniging van Bloemenveilingen in Nederland

Search engine

This search engine allows you to make a detailed search for a full and / or specific productspecification, maturity photo's or thickness photo's. You can do this by filling in a product name (or a part of), product group or product code. You can also choose the correct main group by tapping them on / off.

Cut flowers House plants Garden plants

Search for product, group or code

- [Specific product spcification cut flowers](#)
- [Specific product spcification house plants](#)
- [Specific product spcification garden plants](#)

- [Stage of opening cut flowers](#)
- [Stage of opening house and garden plants](#)
- [Thickness photos house and garden plants](#)

- Product specifications for 52 flower varieties
- Include:
 - Internal quality
 - External quality
 - Maturity (stages of opening)
 - Grading
 - Packing
- Regularly updated in consultation with growers & buyers

Product Specification



Product group code: 10103500
Gypsophila

May 2024

[Minimum Requirements for Trade](#)

[Internal Quality](#)

[External Quality](#)

[Legal Provisions](#)

[Quality and Grading Criteria](#)

[Quality and Grading Criteria](#)

[Packing Requirements](#)

[Recommendations](#)

Minimum Requirements for Trade

Internal Quality

Pre-treatment Specific

Gypsophila supplied in containers must be pretreated and supplied in water with a pretreatment product. At least one of the pretreatment agents with the following codes must be on the label:

- code 11, minimum concentration in the delivery solution is 0.6 ppm;
- code 20, minimum concentration in the delivery solution is 0.8 ppm;
- code 21, minimum concentration in the delivery solution is 0.8 ppm.

The cultivar My Pink is an exception to the requirement for pre-treatment. Here a pre-treatment agent with the active ingredient sodium dichloroisocyanurate (code 11 on the product's label) applies. Dosage: 1 chlorine tablet per 3 liters, according to the legal instructions for use on the label.

External Quality

Maturity Specific

Minimum maturity requirement

Example for Stages of opening



Alstroemeria (grp 10100300)



Maturity sorting

Quality and Grading Criteria

Quality Criteria per Batch

The following supplementary requirements apply:

- Gerbera must be free of growth defects, including breaks in growth, irregularly formed hearts and irregularly formed flowers;
- Gerbera must be free of heels;
- The lot must be free of limp flowers.

The tolerances named in Overview 1 in the general regulations for Cut flowers apply.

Grading Criteria per Batch Specific

The Gerbera should be graded according to:

- Stem length, graded in classes of 5 cm. In departure from the general regulations for Cut Flowers, no maximum length difference applies to those supplied in boxes;
- Flower diameter, where:
 - the diameter is measured along the widest side of a flat flower. In other words, a measuring rule is laid on the flower and the flower is pressed flat. The values arrived at are rounded down to the applicable grading value, in accordance with the overviews;
 - the diameter of the smallest flower, rounded down, is declared.
- Maturity.

Grading of flower diameter

Minimum flower diameter (in cm)	Grading code S23
4	004
5	005
6	006
7	007
8	008
9	009
10	010
11,5	115

Grading Codes Specific

Grading codes overview

Product group no.	Name	GC 1	GC 2	GC 3	GC 4	GC 5	GC 6
1 01 006 01	Gerbera large flowered	S20	S23	S05	L11		
1 01 006 02	Gerbera mini						
1 01 006 03	Gerbera mini globose						
1 01 006 04	Gerbera large flowered globose						
1 01 006 05	Gerbera large flowered curl-shaped						
1 01 006 06	Gerbera mini curl-shaped						
1 01 006 07	Gerbera large flowered spider shaped						
1 01 006 08	Gerbera mini spider shaped						
1 01 006 09	Gerbera nano						
		Mandatory	Mandatory	Advised		Mandatory	

S20 = Minimum stem length

S23 = Minimum flower diameter

S05 = Maturity stage

L11 = Number of stems per bunch



• CONTRACTUAL SPECIFICATIONS IN MASS – MARKET RETAIL:

- Might refer to UNECE flower quality standards as a basis
- Usually: additional contractual quality specifications agreed between buyer and seller on a case-by-case basis

Quality Requirements Flowers and Ornamental Plants

With respect to production and products, the Supplier must observe the following general Buyer's requirements for Suppliers and products. The Supplier is responsible for ensuring that the products and the production and placement on the market meet the requirements European Union/European Economic Area and Finnish legislation. The Supplier is liable for the performances of the supply chain and all of its sub-suppliers and for the compliance of such performances with this agreement as for its own performance.

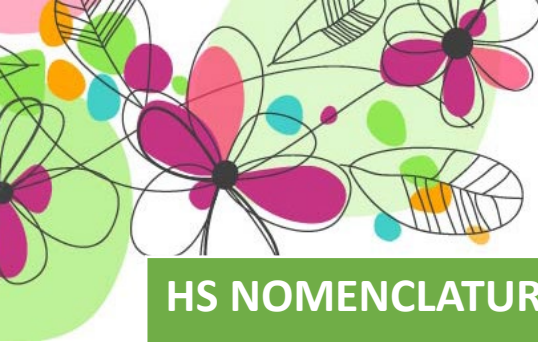
At the Buyer's request, the Supplier must provide the Buyer's representative with any information reasonably required by such representative on the Buyer's product due to this agreement. Unless otherwise agreed, the Supplier is responsible for all environmental and quality registrations and registrations of origin as well as other corresponding registration and notification procedures with the authorities and other relevant parties.

The Suppliers must ensure the safety of their products and compliance with the requirements of European Union/the European Economic Area and Finnish legislation. The Supplier is responsible for the performance of all its subcontractors as for its own performance.

The quality of the flowers and ornamental plants must be in compliance with the Buyer's requirements. The Suppliers must ensure that the products are inspected according to IPPC (International Plant Protection Convention) standards. The Suppliers must ensure that the plants and harmful pests in directive (2000/29/EY) are controlled in the country of origin. The plant health certificates or plant passports are attached to the shipment when applicable. The Suppliers must ensure that the quality of the cut flowers is in compliance with UNECE standards http://www.unece.org/trade/agr/standard/flowers/flower_e.html

The GAP principles (Good Agricultural Practice, GLOBALGAP, More Profitable Sustainability (MPS-GAP)), the Finnish *Laatutarhaohjeistus* guidelines), the IP principles (Integrated Production) or other similar principles must be observed in the cultivation and production of flowers and ornamentals.

At the Buyer's request, the Supplier must deliver documentation relating to product safety and quality assurance.



OVERVIEW:

HS NOMENCLATURE		RELEVANT VARIETIES IN INTERNATIONAL TRADE	UNECE QUALITY STANDARDS 1980/1994
0603 11 00		ROSES	H3
0603 12 00		CARNATIONS	H4 (unifloral) and H5 (multi-floral)
0603 13 00		ORCHIDS	None
0603 14 00		CHRYSANTHEMUMS	H6
0603 15 00		LILIES (<i>Lilium</i> spp.)	None
0603 19 00		OTHER FRESH FLOWERS	H1 CUT FLOWERS (& Annex Mimosa)
0603 90 00		FLOWERS OTHER THAN FRESH	None
	EU CN code: 0603 19 10		H7 GLADIOLI
	EU CN code: 0603 19 20	Ranunculi	
			H8 STRELITZIAS
0603 90 00		FLOWERS OTHER THAN FRESH	None
0604 20		FRESH FOLIAGE	H2 CUT FOLIAGE



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Thanks for your attention!



www.unionfleurs.org



info@unionfleurs.org



<https://www.linkedin.com/company/union-fleurs-international-flower-trade-association>

