



CBI  
*Ministry of Foreign Affairs*

# European market for tropical flowers and foliage

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# Export of (TROPICAL) FLOWERS from Colombia

| PAIS DESTINO         | 2012                 | 2013                 | Var. 2012-2013 | Part. 2013     |
|----------------------|----------------------|----------------------|----------------|----------------|
| Estados Unidos       | 960.766.750          | 1.008.698.547        | 4,99%          | 75,58%         |
| Rusia                | 68.260.094           | 75.154.888           | 10,10%         | 5,63%          |
| Japón                | 56.049.579           | 52.048.988           | -7,14%         | 3,90%          |
| Reino Unido          | 42.870.197           | 49.439.624           | 15,32%         | 3,70%          |
| Canadá               | 35.011.261           | 35.358.958           | 0,99%          | 2,65%          |
| Países Bajos         | 26.481.610           | 27.355.603           | 3,30%          | 2,05%          |
| España               | 22.348.045           | 19.507.701           | -12,71%        | 1,46%          |
| Puerto Rico          | 5.940.546            | 6.087.272            | 2,47%          | 0,46%          |
| Australia            | 4.455.996            | 6.013.616            | 34,96%         | 0,45%          |
| Chile                | 2.027.204            | 5.762.206            | 184,24%        | 0,43%          |
| ...                  | ...                  | ...                  | ...            | ...            |
| <b>Total general</b> | <b>1.270.007.459</b> | <b>1.334.596.602</b> | <b>5,09%</b>   | <b>100,00%</b> |



# Export of (TROPICAL) FLOWERS from Colombia

| DESTINO         | VALOR (USD\$)            |                          |                          |                            | KILOGRAMOS        |                   |                   |                            |
|-----------------|--------------------------|--------------------------|--------------------------|----------------------------|-------------------|-------------------|-------------------|----------------------------|
|                 | 2011                     | 2012                     | 2013                     | % de participación en 2013 | 2011              | 2012              | 2013              | % de participación en 2013 |
| Estados Unidos  | \$ 405.943.339,12        | \$ 447.042.836,94        | \$ 470.134.178,72        | 95,92                      | 54.891.015        | 53.456.492        | 60.225.548        | 94,4                       |
| Canadá          | \$ 4.245.911,27          | \$ 8.293.129,08          | \$ 7.837.542,11          | 1,6                        | 827.097           | 1.375.507         | 1.385.115         | 2,2                        |
| Puerto Rico     | \$ 2.428.970,46          | \$ 2.205.555,19          | \$ 2.267.992,12          | 0,46                       | 368.886           | 333.141           | 325.012           | 0,5                        |
| Corea del Sur   | \$ 1.128.215,54          | \$ 1.682.403,68          | \$ 1.998.165,10          | 0,41                       | 239.051           | 342.080           | 397.232           | 0,6                        |
| Reino Unido     | \$ 745.033,27            | \$ 1.261.460,19          | \$ 2.310.784,26          | 0,47                       | 178.560           | 250.452           | 463.299           | 0,7                        |
| Japón           | \$ 794.853,25            | \$ 1.170.799,22          | \$ 1.560.988,97          | 0,32                       | 147.276           | 190.812           | 239.786           | 0,4                        |
| Emiratos Árabes | \$ 330.561,85            | \$ 481.855,10            | \$ 693.191,03            | 0,14                       | 74.534            | 94.036            | 113.078           | 0,2                        |
| Holanda         | \$ 614.801,09            | \$ 493.404,74            | \$ 380.647,75            | 0,08                       | 210.801           | 182.953           | 116.368           | 0,2                        |
| Panamá          | \$ 443.464,38            | \$ 555.774,16            | \$ 404.434,52            | 0,08                       | 74.867            | 98.070            | 78.059            | 0,1                        |
| Kuwait          | \$ 158.428,36            | \$ 216.744,58            | \$ 356.475,17            | 0,07                       | 36.386            | 50.881            | 67.652            | 0,1                        |
| Bahrein         | \$ 186.546,86            | \$ 164.204,93            | \$ 117.973,04            | 0,02                       | 51.132            | 30.534            | 22.949            | 0                          |
| Otros países    | \$ 1.887.204,72          | \$ 1.600.207,87          | \$ 2.060.705,32          | 0,42                       | 445.987           | 328.620           | 389.321           | 0,6                        |
| <b>Total</b>    | <b>\$ 418.907.330,17</b> | <b>\$ 465.168.375,68</b> | <b>\$ 490.123.078,11</b> |                            | <b>57.545.591</b> | <b>56.733.578</b> | <b>63.823.421</b> |                            |

0603199000 Flor fresca cortada (otros)

Fuente: Dane, cálculos Asocolflores



## Exports of (TROPICAL) FLOWERS to EU 28

- There are no statistical data available on tropical flowers: we use HS 0603.
- Total exports of Colombia to the world in 2013 US\$ 1.334 million.
- Total exports of Colombia to EU-28 in 2013 US\$ 117 million.
- Approximately 9% of total exports go to EU-28 ( USA 76%, RUS 6%).
- 5% growth 2012 → 2013.
- Cultivation of *PROTEA LEUCADENDRON* shows significant growth (71 has).



# Exports of (TROPICAL) FOLIAGE from Colombia

| PAIS DESTINO        | 2012             | 2013             | Var. 2012-2013 | Part. 2013    |
|---------------------|------------------|------------------|----------------|---------------|
| Estados Unidos      | 3.345.347        | 4.054.994        | 21,21%         | 62,6%         |
| Canadá              | 546.028          | 768.231          | 40,69%         | 11,9%         |
| Ecuador             | 272.926          | 495.767          | 81,65%         | 7,7%          |
| Países Bajos        | 322.213          | 382.802          | 18,80%         | 5,9%          |
| Antillas Holandesas | 117.956          | 174.658          | 48,07%         | 2,7%          |
| Aruba               | 78.463           | 95.033           | 21,12%         | 1,5%          |
| Panamá              | 92.114           | 94.671           | 2,78%          | 1,5%          |
| Japón               | 85.870           | 62.960           | -26,68%        | 1,0%          |
| Trinidad y Tobago   | 38.095           | 51.100           | 34,14%         | 0,8%          |
| España              | 16.613           | 47.744           | 187,38%        | 0,7%          |
| ...                 | ...              | ...              | ...            | ...           |
| <b>Total</b>        | <b>5.244.337</b> | <b>6.473.800</b> | <b>23,44%</b>  | <b>100,0%</b> |



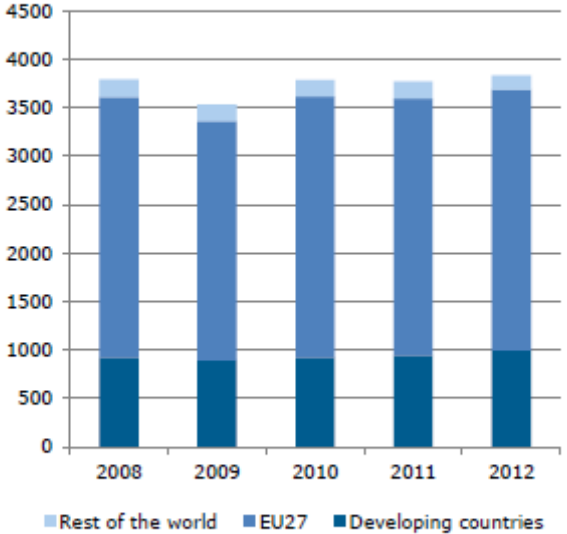
## Exports of (TROPICAL) FOLIAGE to EU 28

- There are no statistical data available on tropical foliage: we use HS 0604
- Total exports of Colombia to the world in 2013 US\$ 6.5 million
- Total exports of Colombia to EU-28 in 2013 US\$ 550.000.
- Approximately 8% of total exports go to EU-28 ( USA 62%, CAN 12%, ECU 8%).
- 23% growth 2012 → 2013.



# Import

Figure 1: Imports by EU countries of fresh cut flowers and foliage, 2008-2012, in million euro



Source: Eurostat Comext; calculations LEI.

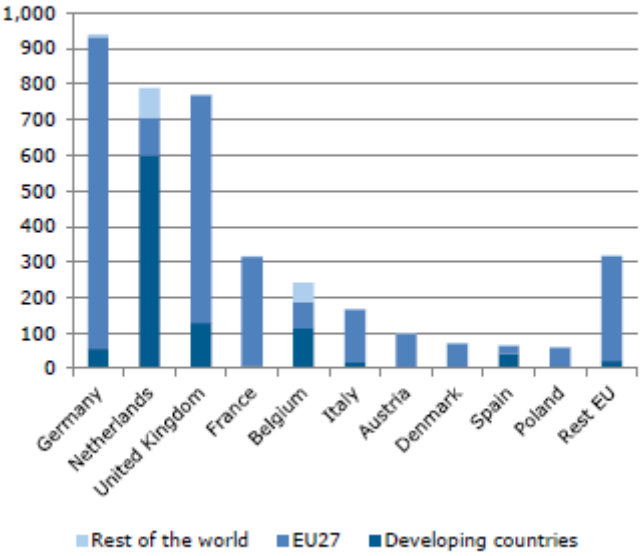
- Total imports of fresh cut flowers and foliage by EU countries from non-EU countries (Extra-EU trade) amounted to around € 1.1 billion in 2012, with the majority of these imports coming from DC suppliers.
- 60% of all imports enter through the Netherlands.
- Large part of these flowers are re-exported.
- Total imports of fresh cut flowers and foliage from other EU countries (Intra-EU trade) amounted to about € 2.6 billion in 2012.





# Import

Figure 2: Imports by EU27 countries of fresh cut flowers and foliage, 2012, in millions of euro, top 10 importing EU countries



Source: Eurostat Comext; calculations LEI.

- EU imports from non-EU countries in 2012:
  - 54% rose
  - 17% fresh foliage
  - Others
- Germany, the Netherlands and UK biggest import markets
- Germany trade flow through the Netherlands
- UK retailers: direct imports



# Import

**Table 1: Leading DC suppliers of fresh cut flowers and foliage to the EU27, in 2012**

|                       | Euro x million,<br>2012 | Share in Extra-EU<br>imports, 2012 | Annual growth<br>'08-'12 |
|-----------------------|-------------------------|------------------------------------|--------------------------|
| Kenya                 | 366                     | 32%                                | 1%                       |
| Ecuador               | 150                     | 13%                                | 4%                       |
| Ethiopia              | 140                     | 12%                                | 20%                      |
| Colombia              | 114                     | 10%                                | -1%                      |
| Costa Rica            | 45                      | 4%                                 | -5%                      |
| Uganda                | 26                      | 2%                                 | 1%                       |
| Other DC<br>suppliers | 305                     | 27%                                | -4%                      |

*Source: EurostatComext; calculations LEI.*

- Kenya is largest supplier from DC countries.
- Ethiopia is fast growing.
- Colombia steady supply.
- Market growth has slowed down but imports from DC countries grew 7,5% from 2008-2012.



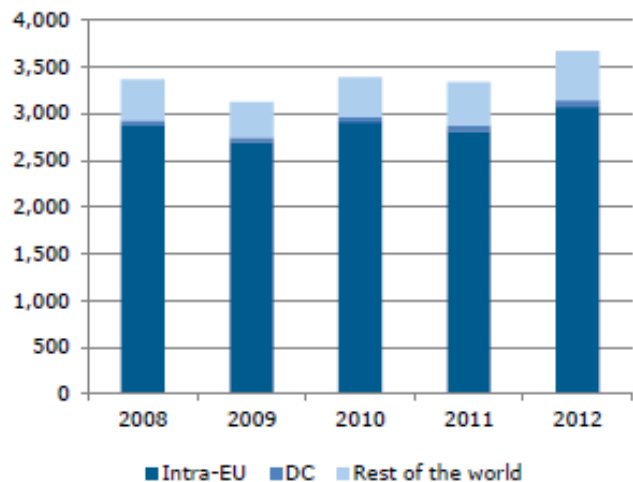
# Import

- Imports of Tropical Flowers and Foliage which compete with Colombia:
  - Ecuador / Costa Rica
  - Ivory Coast, Tanzania, and Cameroon
- Tropical Flowers & Foliage is a niche market.



# Export

Figure 3: Exports by EU27 countries of fresh cut flowers and foliage in 2008-2012, in euro x million



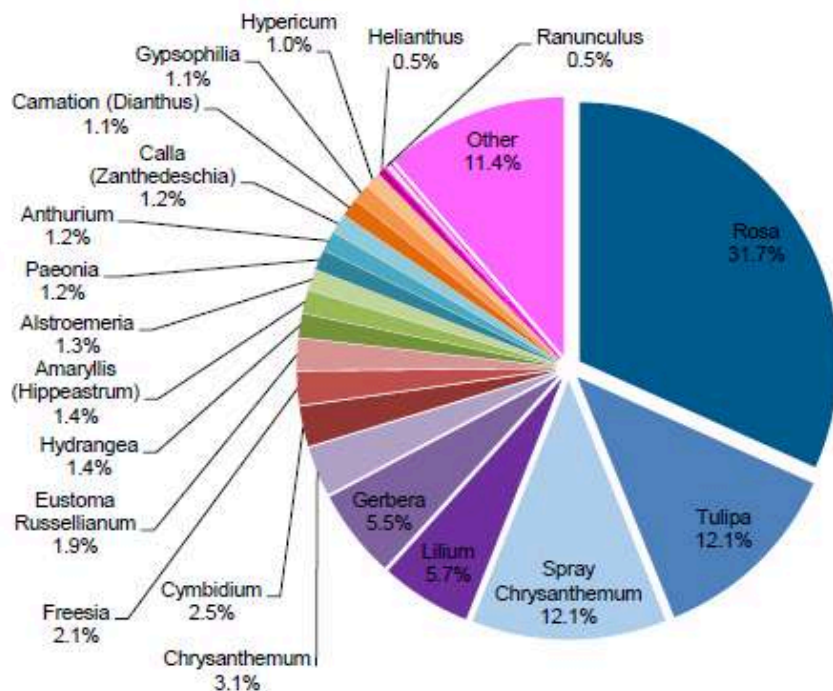
Source: Eurostat Comext; calculations LEI.

- Total exports of fresh cut flowers and foliage by all EU countries amounted to around € 3.8 billion in 2012 (intra- and extra-EU trade).
- 80% traded within EU.
- The Netherlands is the biggest exporter of cut flowers €3.1 billion exported mainly to the European market (2012).
- The Dutch flower auction FloraHolland is the trading hub for all cut flowers and foliage.
- The auction offers both a physical auction and a virtual auction system as well as direct trading or sales services.



# Production

Figure 7: Cut flowers at the Dutch Auctions, in % of turnover in 2012



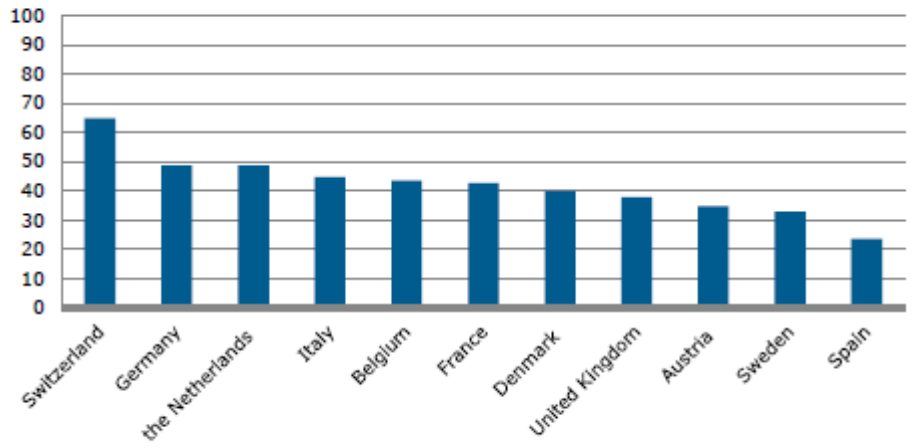
Source: FloraHollandFacts and Figures 2011 and 2012.

- Only the Netherlands produce € 4.1 billion (of which € 2 billion in greenhouses) which is similar to total imports
- Due to increasing costs, some European growers are relocating their production to lower cost countries that offer favorable cultivation conditions.
- Rose production, in particular, is shifting to other continents, mainly Africa.
- Tropical flowers and foliage very limited production (in greenhouses)



# Consumption

Figure 8: Consumption of cut flowers for selected countries, in euro per capita, average for 2009 and 2011



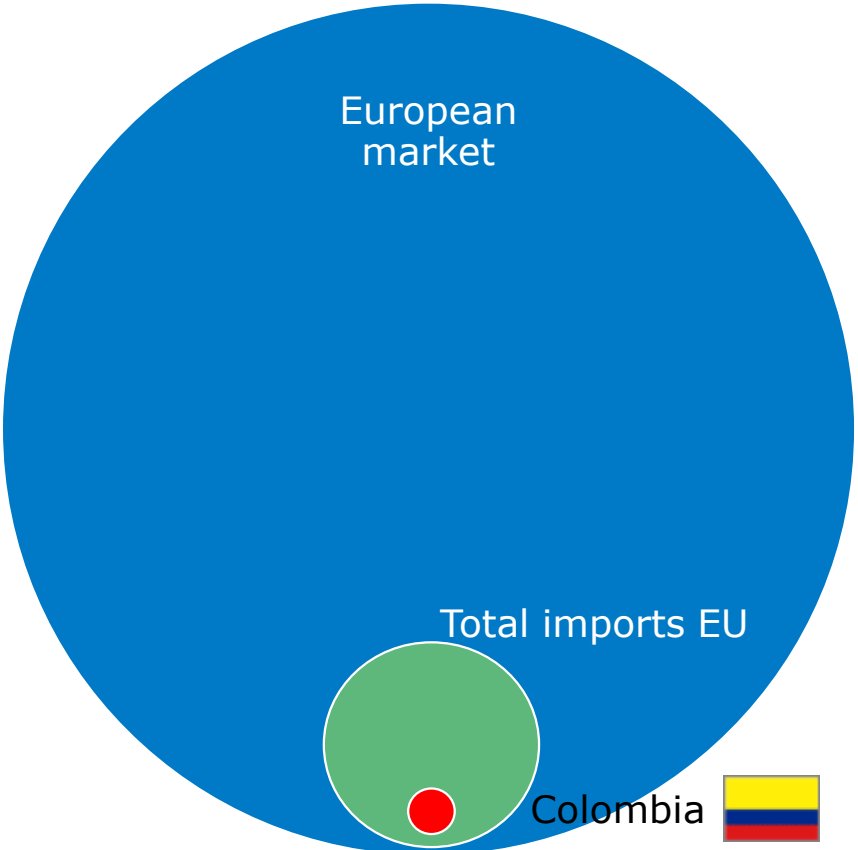
Source: PT (2011) and PT (2012), calculations LEI.

- The European market for cut flowers was estimated at around € 18 billion in 2011
- Per capita, Switzerland, Germany and The Netherlands are the main flower consuming countries.

- Within Europe, Germany (about 4 billion euro in 2009), Italy (2.7 billion euro), France (2.7 billion euro) and the UK (2.2 billion euro) are the biggest markets in terms of consumption value.
- Consumption in Western Europe is stable / Eastern Europe is growing.
- Where do you want to sell high quality products?



# Summary EU-28 and Colombia



- The European market for cut flowers and foliage was estimated at around € 18.000 million
- Total imports around € 1.100 million
- Columbia supplied in cut flowers an foliage around € 88 million
- Conclusion