

Sources of Roses Supply to EU

A. - in Value

Value in Thousands Euros

Source: AIPH

From Non-EU Countries

Country of origin	2008	Rank	2011	Rank	Change	2012	Rank	Change
Kenya	268,993	1	290,751	1	8.1%	294,421	1	1.3%
Ethiopia	61,571	3	116,652	2	89%	130,753	2	12%
Ecuador	84,535	2	94,631	3	12%	103,605	3	9.5%
Colombia	22,845	5	27,746	4	21%	30,499	4	10%
Uganda	24,774	4	23,801	5	-3.9%	25,813	5	8.5%
Zambia	14,895	6	15,649	6	5.1%	18,433	6	18%
Zimbabwe	13,629	7	7,044	7	-48%	6,207	7	-12%
Tanzania	9,817	8	5,799	8	-41%	4,771	8	-18%
India	2,502	9	2,157	9	-14%	1,629	9	-24%
Norway	0		0			315	10	+++
Serbia	0		82	11	+++	178	11	117%
Macedonia	134	15	56	13	-58%	71	12	27%
Morocco	0		48	14	+++	44	13	-8.3%
South Africa	2,215	10	38	15	-98%	37	14	-2.6%
Other Countries	4,343		292			181		-38%
Total to the EU	508,038		584,746		15%	616,957		5.5%
To Switzerland & Norway	39,039		55,922		43%	71,819		28%

From EU Countries

Country of origin	2008	Rank	2011	Rank	Change	2012	Rank	Change
Netherlands*	631,916	1	661,845	1	4.7%	715,908	1	8.2%
Belgium/Luxemburg	5,284	3	6,438	3	22%	25,892	2	302%
Germany	7,509	2	7,034	2	-6.3%	8,541	3	21%
United Kingdom	1,298	5	1,651	6	27%	4,469	4	171%
Italy	1,319	4	2,719	4	106%	3,066	5	13%
EU-Others	686	9	2,268	5	231%	1,215	6	-46%
Spain	861	6	861	7	0.0%	828	7	-3.8%
Sweden	765	7	343	13	-55%	744	8	117%
France	272	12	555	9	104%	635	9	14%
Denmark	515	11	359	12	-30%	549	10	53%
Austria	759	8	805	8	6.1%	539	11	-33%
Hungary	3	15	412	11	+++	495	12	20%
Poland	241	13	87	15	-64%	305	13	251%
Czech Republic	517	10	415	10	-20%	293	14	-29%
Other Countries	0		0			0		
Total to the EU	651,998		685,915		5.2%	763,749		11%
To Switzerland & Norway	39,755		39,331		-1.1%	31,474		-20%

* The Netherlands' export includes significant share of re-exported roses, originated from other countries

Roses Supply to EU

(cont.)

B. in Unit Quantity

Quant. in Thousand Stems

From Non-EU Countries

Country of origin	2008	Rank	2011	Rank Change	2012	Rank Change		
Kenya	2,639,814	1	2,733,224	1	3.5%	2,640,222	1	-3.4%
Ethiopia	651,216	2	1,166,107	2	79%	1,266,662	2	8.6%
Ecuador	259,286	5	292,349	3	13%	280,384	3	-4.1%
Uganda	334,568	4	273,568	4	-18%	273,814	4	0.1%
Zambia	174,431	6	183,655	6	5.3%	209,103	5	14%
Zimbabwe	361,118	3	200,211	5	-45%	137,979	6	-31%
Colombia	71,367	8	79,657	7	12%	79,086	7	-0.7%
Tanzania	86,851	7	61,459	8	-29%	57,464	8	-6.5%
India	18,328	10	15,171	9	-17%	11,435	9	-25%
Serbia	0		705	10	+++	1,511	10	114%
Norway	0		0			1,046	11	+++
Macedonia	841	15	238	14	-72%	329	12	38%
Morocco	0		305	13	+++	258	13	-15%
South Africa	26,154	9	158	15	-99%	176	14	11%
Brazil	5,752	12		0	---	146	15	+++
Other Countries	10,842		11,624		7.2%	100,358		763%
Total to the EU	4,645,869		5,008,431		7.8%	5,059,969		1.0%
To Switzerland & Norway	0		151,506		+++	166,877		10%

From EU Countries

Country of origin	2008	Rank	2011	Rank Change	2012	Rank Change		
Netherlands*	2,029,021	1	2,160,851	1	6.5%	2,322,661	1	7.5%
Belgium/Luxemburg	17,634	3	29,004	2	64%	206,249	2	611%
Germany	27,566	2	21,883	3	-21%	27,008	3	23%
Italy	2,869	7	9,657	4	237%	9,902	4	2.5%
United Kingdom	1,738	9	3,115	5	79%	6,998	5	125%
EU-Others	3,222	5	1,947	6	-40%	3,665	6	88%
Spain	2,673	8	1,286	9	-52%	2,583	7	101%
Sweden	3,131	6	1,049	10	-66%	2,335	8	123%
France	551	12	1,567	8	184%	1,431	9	-8.7%
Hungary	8	15	794	12	+++	957	10	21%
Austria	4,245	4	1,795	7	-58%	897	11	-50%
Poland	1,294	10	394	13	-70%	617	12	57%
Denmark	303	13	891	11	194%	441	13	-51%
Finland	258	14	234	15	-9.3%	306	14	31%
Czech Republic	592	11	246	14	-58%	188	15	-24%
Other Countries	0		0			0		
Total to the EU	2,094,943		2,234,714		6.7%	2,586,236		16%
To Norway	0		8,859		+++	7,682		-13%

* The Netherlands' export includes significant share of re-exported roses, originated from other countries



Notes:

Import in Value:

The strong growth in EU imports of roses originating from Non-European countries throughout the past ten years has changed into a moderate increase of 5.5 %, while it was 4.3% in 2011, compared to 2010, and it was +6.9% in 2010, compared to 2009. During many previous years the growth rates were by far bigger.

Production and export from Kenya still increased in 2012, but the growth has become digressive; the same in Ethiopia now, after very strong increases during the the years before.

Clearly shown in the survey was that the number of rose production countries did not grow anymore as it did during many years. To the contrary, some important supplying countries of the past have nearly disappeared from the market (Israel, South Africa, Brazil and Morocco). It can be learned from the surveys, that the import share into the EU has changed considerably. Was the share of imports into the EU, originating from other EU-countries 60 % in 2006, it turned out to be around 50 % in 2011 and 44 % in 2012.

Hardly any changes of imports per country in the EU-Imports from other EU-countries. Some strong changes, however in the list of Non-EU-countries. Continuous growth from countries like: Kenya, Ecuador, Ethiopia, Colombia, Uganda and Zambia while other countries became again less important, especially: Zimbabwe, India. South Africa, Israel and Brazil have almost totally disappeared from the rose market.

Import in Units/Stems

The development of supplied quantities was more or less in line with what is shown on the value front. However, still a slight increase of quantities from Non-EU-countries (+ 1.1 %) and slight increase (+ 1.6 %) from the EU countries, realised by the Netherlands only, by far the most important EU production and exporting country.

The 2012 share from Non-EU-countries was 66% of the total EU imports. Remarkable are the continues strong decrease of supply from countries such as, Tanzania, India and Zimbabwe. Really the most important number of production and supplying countries are brought back to seven, all non-European countries and the Netherlands as the only very important country in the EU and Europe.

