

Sources of Other Fresh Flowers¹ Supply to EU

A. in Value

Value in Thousands Euros

Source: AIPH

From Non-EU Countries

Country of origin	2010	Rank	2013	Rank	Change	2014	Rank	Change
Ecuador	36,586	2	39,862	3	9.0%	47,599	1	19%
Kenya	32,389	3	41,139	2	27%	44,827	2	9.0%
Israel	63,997	1	43,003	1	-33%	39,623	3	-7.9%
Colombia	10,163	4	8,977	4	-12%	8,934	4	-0.5%
South Africa	7,773	5	7,342	5	-5.5%	8,505	5	16%
Ethiopia	5,911	6	7,141	6	21%	8,018	6	12%
Tanzania	2,341	9	2,514	8	7.4%	3,031	7	21%
Zimbabwe	4,471	7	2,321	9	-48%	2,489	8	7.2%
Zambia	0		1,409	11		2,018	9	43%
Ivory Coast	2,961	8	1,617	10	-45%	1,692	10	4.6%
Ghana	801	14	1,049	13	31%	1,041	11	-0.8%
Costa Rica	2,117	10	1,326	12	-37%	969	12	-27%
Turkey	819	13	706	15	-14%	818	13	16%
Cameroon	865	12	736	14		767	14	4.2%
Peru	2,063	11	2,623	7	27%	736	15	-72%
Other countries	8,055		3,009		-63%	2,565		
Total to the EU	179,454		164,774		-8.2%	173,632		5.4%
To Switzerland & Norway	3,134		3,827		22%	4,975		30%

From EU Countries

Country of origin	2010	Rank	2013	Rank	Change	2014	Rank	Change
Netherlands*	1,231,116	1	1,143,152	1	-7.1%	1,175,129	1	2.8%
Italy	33,602	3	27,653	2	-18%	23,418	2	-15%
Belgium/luxemburg	45,099	2	15,274	3	-66%	18,541	3	21%
Germany	17,443	4	12,936	4	-26%	12,121	4	-6.3%
United Kingdom	7,629	6	10,571	5	39%	10,316	5	-2.4%
Poland	6,061	8	10,054	6	66%	9,387	6	-6.6%
Spain	8,614	5	8,054	7	-6.5%	5,022	7	-38%
France	7,317	7	6,942	8	-5.1%	4,419	8	-36%
EU-Others	4,511	9	5,918	9	31%	3,185	9	-46%
Denmark	1,242	11	3,583	11	188%	1,405	10	-61%
Austria	2,361	10	1,941	12	-18%	1,226	11	-37%
Hungary	791	12	284	13	-64%	567	12	100%
Sweden	292	14	195	14	-33%	154	13	-21%
Czech Republic	623	13	4,049	10	550%	101	14	-98%
Finland	245	15	104	15	-58%	64	15	-38%
Total to the EU	1,366,947		1,250,709		-8.5%	1,265,053		1.1%
To Switzerland & Norway	84,209		92,082		9.3%	91,624		-0.5%

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

Other Fresh Flowers Supply to EU (cont.)

B. in Units/Quantity

Quant. in Thousand Stems

From Non-EU Countries

Country of origin	2010	Rank	2013	Rank	Change	2014	Rank	Change
Kenya	8,732	2	10,479	1	20%	11,084	1	5.8%
Israel	13,353	1	9,441	2	-29%	9,086	2	-3.8%
Ecuador	6,886	3	6,506	3	-5.5%	6,445	3	-0.9%
Colombia	2,538	4	2,103	4	-17%	2,233	4	6.2%
Ethiopia	1,692	7	1,809	6	6.9%	2,071	5	14%
South Africa	1,927	6	1,907	5	-1.0%	1,966	6	3.1%
Zimbabwe	2,226	5	955	7	-57%	1,154	7	21%
Ivory Coast	971	8	631	8	-35%	641	8	1.6%
Zambia	343	13	593	9	73%	601	9	1.3%
Tanzania	481	10	442	10	-8.1%	509	10	15%
Turkey	368	12	351	13	-4.6%	417	11	19%
Ghana	253	15	288	14	14%	283	12	-1.7%
Costa Rica	635	9	358	12	-44%	265	13	-26%
Cameroon	263	14	233	15	-11%	238	14	2.1%
Peru	369	11	437	11	18%	135	15	-69%
Other countries	1,271		661		-48%	533		-19%
Total to the EU	42,381		37,194		-12%	37,661		1.3%
To Switzerland & Norway	453		501		11%	631		26%

From EU Countries

Country of origin	2010	Rank	2013	Rank	Change	2014	Rank	Change
Netherlands*	248,504	1	228,786	1	-7.9%	224,465	1	-1.9%
Belgium/Luxemburg	8,195	2	2,288	4	-72%	4,755	2	108%
Italy	5,215	3	3,966	3	-24%	3,162	3	-20%
United Kingdom	1,507	6	4,484	2	198%	2,208	4	-51%
Germany	4,335	4	2,619	5	-40%	2,057	5	-21%
Poland	1,022	9	2,001	6	96%	1,489	6	-26%
EU-Others	1,065	8	1,753	8	64.6%	1,487	7	-15%
Spain	2,217	6	1,995	7	-10%	1,468	8	-26%
France	1,287	7	918	10	-29%	666	9	-27%
Hungary	101	13	51	13	-50%	489	10	859%
Denmark	301	11	1,322	9	339%	255	11	-81%
Austria	313	10	332	11	6.1%	198	12	-40%
Sweden	57	14	43	14	-25%	28	13	-35%
Czech Republic	113	12	158	12	40%	17	14	-89%
Finland	41	15	19	15	-54%	9	15	-53%
Total to the EU	274,273		250,735		-8.6%	242,756		-3.2%
To Switzerland & Norway	9,299		9,843		5.9%	9,754		-0.9%

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

¹ Other Fresh Flowers in the cut flower assortment, are those other than: roses, carnations, chrysanthemum, orchids, lilies, gladiolus and treated Fresh Cut Flowers.



Notes:

¹ **Other Fresh Flowers** in the cut flower assortment, are those other than: roses, carnations, chrysanthemum, orchids, lilies, gladiolus and treated Fresh Cut Flowers.

Import in Value:

It is clear that the value of Other Fresh Flowers originating from the overseas countries and from EU countries has decreased rather strongly during the past 5 – 10 years. However in 2014 a slight increase could be noticed again. In the past when new countries started to develop floriculture, almost all of them started with other flowers than the traditional roses or carnations, just because of costs, and learning how to grow cut flowers. Recently, most of the traditional countries had directly started with the cultivation of roses and many newer countries started with roses as from the beginning. They must have learned from the countries that started earlier.

Maybe, also the prices and revenues of roses were higher in the past. Nowadays that is questionable, because rose prices have dropped quite considerably during the past years, when compared to some 10 – 20 years ago. They must have compensated that loss of price by having more production per square meter.

The total value from Non-EU-Countries has in 2014 increased with 5.3 % and from EU countries with 1.2 %. Of the EU countries the situation has, more or less, stabilised during the same period. The rank of the top 15 list has hardly changed.

The same could be said of the Non-EU-countries, except of the first three. Till 2010 Israel was, by far, the leading country. Now it has become Ecuador, with Kenya as the second. Ethiopia has become number five with an increase every other year.

In the survey of EU countries slight decreases, such as: Germany, Spain, Italy and France. The Netherlands is, by far, the leading country in the EU with about 93 %, that was 91 % in 2013.

Import in Units/Stems

In the surveys of volume the same pattern as in the surveys of value: a slow down for many EU-countries as well a slight increase of the Non-EU countries, for sure when compared 2013 and 2010.

Remarkable in the survey of Non-EU-countries is no decrease, even a slow increase in volume of: Kenya, Ecuador, Ethiopia and South Africa and only but a very slight further decrease of Israel.

However, when compared to 2010 a considerable decrease is noticed. The EU-countries had hardly any change. The Netherlands have decreased slightly during the past several year, but the



Market Insider