

Sources of Roses 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
Kenya	275,927	1	299,237	1	8.4%	326,114	1	9.0%
Ethiopia	103,972	2	136,219	2	31%	154,474	2	13%
Ecuador	92,668	3	103,254	3	11%	132,202	3	28%
Colombia	27,564	4	29,083	4	5.5%	33,191	4	14%
Uganda	22,661	5	28,073	5	24%	25,711	5	-8.4%
Zambia	16,829	6	16,437	6	-2.3%	14,015	6	-15%
Tanzania	6,424	8	5,104	7	-21%	4,609	7	-9.7%
Zimbabwe	11,212	7	4,097	8	-63%	3,724	8	-9.1%
India	2,303	9	2,032	9	-12%	2,891	9	42%
Serbia	149	13	184	10	23%	243	10	32%
Macedonia	0		66	14	+++	63	11	-4.5%
Morocco	88	14	0		---	26	12	+++
Israel	209	12	27	15	-87%	23	13	-15%
Brazil	221	11	0		---	21	14	+++
Turkey	0		0			9	15	+++
Other countries	574		431		-25%	104		-76%
Total to the EU	560,801		624,244		11%	706,642		13%
To Switzerland & Norway	48,519		68,054		40%	70,661		3.8%

From EU Countries

Country of origin	2010	Rank	2013	Rank	Change	2014	Rank	Change
Netherlands*	660,822	1	754,342	1	14%	740,631	1	-1.8%
Belgium & Luxemburg	3,663	3	36,544	2	898%	63,522	2	74%
Germany	8,346	2	7,002	3	-16.1%	8,446	3	21%
Spain	791	7	1,616	6	104%	4,623	4	186%
United Kingdom	1,607	5	3,246	4	102%	4,449	5	37%
Italy	2,303	4	2,273	5	-1.3%	3,713	6	63%
Denmark	171	13	988	8	478%	1,026	7	3.8%
Austria	589	10	766	9	30%	647	8	-16%
France	327	12	712	10	118%	533	9	-25%
EU-Others	582	11	1,384	7	138%	527	10	-62%
Czech Republic	997	6	426	11	-57%	487	11	14%
Sweden	662	8	371	12	-44%	305	12	-18%
Poland	68	15	154	14	126%	284	13	84%
Finland	121	14	149	15	23%	268	14	80%
Hungary	591	9	313	13	-47%	217	15	-31%
Total to the EU	681,641		810,305		19%	829,678		2.4%
To Switzerland & Norway	37,738		38,298		1.5%	35,551		-7.2%

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

Market Insider

Roses Supply to EU

(cont.)

B. in Unit Quantity

Quant. in Thousand Stems

From Non-EU Countries

Country of origin	2010	Rank	2013	Rank	Change	2014	Rank	Change
Kenya	2,647,893	1	2,594,921	1	-2.0%	2,746,652	1	5.8%
Ethiopia	1,029,342	2	1,359,094	2	32%	1,695,536	2	25%
Ecuador	274,936	4	291,819	3	6.1%	318,331	3	9.1%
Zambia	190,442	6	216,539	5	14%	211,174	5	-2.5%
Zimbabwe	305,961	3	105,054	6	-66%	86,046	6	-18%
Colombia	83,441	7	73,871	7	-11%	81,806	7	11%
Tanzania	60,959	8	70,237	8	15%	61,438	8	-13%
India	21,853	9	14,022	9	-36%	18,489	9	32%
Serbia	894	14	1,796	11	101%	2,845	10	58%
Macedonia	0		533	12	+++	576	11	8.1%
Morocco	655	15	258	15	-61%	175	12	-32%
Israel	1,635	11	0		---	161	13	+++
Brazil	2,615	10	0		---	85	14	+++
Sri Lanka	0		0			78	15	+++
Other Countries	2,814		3,628		29%	873		-76%
Total to the EU	4,895,052		5,022,236		2.6%	5,486,446		9.2%
To Norway	108,913		178,669		64%	190,493		6.6%

From EU Countries

Country of origin	2010	Rank	2013	Rank	Change	2014	Rank	Change
Netherlands*	2,244,081	1	2,546,718	1	13%	2,700,231	1	6.0%
Belgium & Luxemburg	14,063	3	242,163	2	1622%	218,956	2	-10%
Germany	30,173	2	17,842	3	-41%	25,444	3	43%
Spain	1,501	9	5,471	5	264%	12,269	4	124%
United Kingdom	2,852	5	6,412	4	125%	7,319	5	14%
Italy	6,352	4	5,076	6	-20%	7,167	6	41%
EU-Others	1,732	7	4,262	7	146%	1,684	7	-60%
Denmark	193	14	1,419	10	635%	1,618	8	14%
France	733	12	1,622	9	121%	1,101	9	-32%
Austria	1,632	8	1,944	8	19%	1,036	10	-47%
Poland	169	15	503	13	198%	1,017	11	102%
Sweden	2,546	6	1,267	11	-50%	944	12	-25%
Hungary	1,204	10	532	12	-56%	641	13	20%
Finland	258	13	259	15	0.4%	565	14	118%
Czech Republic	785	11	421	14	-46%	373	15	-11%
Total to the EU	2,308,274		2,835,912		23%	2,980,362		5.1%
To Norway	14,789		6,493		-56%	4,458		-31%

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



Market Insider

Notes

Import in Value

The moderate growth of roses in value originating from Non-European countries throughout the past years has changed into a stronger increase of 13 % in 2014 when compared to 2013 when it was 1.2 % compared to 2012 and it was 5.5 % compared to 2011.

During many previous years the increasing percentages were far bigger. Production and export from Kenya and Ethiopia have again increased rather strongly, but the growth has become more regressive now; also in Ethiopia after very strong increases of the past 10 years, right after the beginning of the rose production in the country. Clearly shown in the survey is that the number of rose producing countries did not grow anymore as it did during previous years.

In the ranking order of the top 9 countries nothing has changed in 2014 when compared to 2013. To the contrary, some very important supplying countries of the past have nearly disappeared from the market such as: Israel, South Africa, Brazil and Morocco.

No or hardly any changes of imports per country in the EU-Imports from other EU-countries. Some minor changes, however in the ranking list of Non-EU-countries. A continuous considerable growth from countries like: Kenya, Ethiopia, Ecuador and Colombia while other countries such as several African countries like: Uganda, Zambia and Tanzania show some decreases.

Much stronger decreases however from Zimbabwe, Israel and Brazil. The latter two countries have nearly disappeared as a rose nation.

Import in Units/Stems

The development of supplied quantities was more or less in line with what is shown on the value front. However again a considerable increase of quantities from Non-EU-countries (+ 9.2%) and a smaller increase (+ 5.1%) from the EU countries, realised by the Netherlands mainly, by far the most important EU producing and exporting country. It has to be stated that a very big part of the imports from Holland are re-exported. Recently the same happens in Belgium.

The 2014 share from Non-EU-countries was 66% of the total EU imports. In 2013 the percentage was 64%. Remarkable is the continuous strong decrease of supply from countries such as, India, Israel, Morocco and Zimbabwe. In several of them the production has almost totally disappeared. Really the most important number of production and supplying countries are brought back to ten countries, nine non-European countries and the Netherlands as the only very important country in the EU and Europe.