PA-ABR-599

KENYA EXPORT DEVELOPMENT SUPPORT

EUROPEAN MARKET SURVEY

FOR

SELECTED KENYAN CUT FLOWERS

Development Alternatives, Inc.
USAID Contract No. 623-0249-C-00-2021-00
KEDS Project P.O. Box 40312 Nairobi, Kenya

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European Market Survey

for

Select Kenyan Cut Flowers

Prepared by
David Jones
Fintrac Inc.

USAID Contract No. 623-0249-C-00-2021-00

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OVERVIEW

Market Opportunities for Kenyan Exporters

The table below gives a brief overview of European market prospects for Kenyan roses, carnations and statice. Products are rated on the following scale:

5 Excellent/Good Market Prospect, high volume potential
4 Excellent/Good Market Prospect, low volume potential niche
3 Fair Market Prospect, high volume potential
2 Fair Market Prospect, low volume potential (niche)
1 Poor Market Prospect
0 No Market Prospect

Those marked with an asterisk (*) signify that additional market research is needed before any further steps can be recommended.

Product	Ranking	Notes
		France
Roses	2*	Potential winter window; main suppliers are Netherlands and Morocco. Further research needed.
Carnations	2*	Increasing market, decreasing value; Netherlands and Colombia main suppliers. Further research.
Statice	3*	No statistics available; further research needed.
		Germany
Roses	3	Certain Kenyan suppliers have an existing market; image problems with Africa on the whole with regards to re-packing and re-grading.
Carnations	4	Good existing market for Kenya; increasing competition from Mediterranean and Spain.
Statice	3*	Netherlands is main supplier to rest of EC; small opportunity in winter months; field research required.

Product	Ranking	Notes
Netherlands		
Roses	2	Small existing market for Kenya; highest quality needed; December through February only window.
Carnations	3	Good existing market for Kenya; increased competition from Spain and Turkey leading to oversupply and ever smaller windows of opportunity however.
Statice	4	Large, accessible market; dominated by domestic summer production; window November through May.
United Kingdom		
Roses	3	Larger import market than the Netherlands with considerable room for expansion; highly competitive however, need to improve market reputation.
Carnations	2	Well supplied by Colombia and the Netherlands, but declining domestic production could lead to alternative markets.
Statice	3	Large market dominated by the Netherlands; continuity of supply essential

Trade Profile

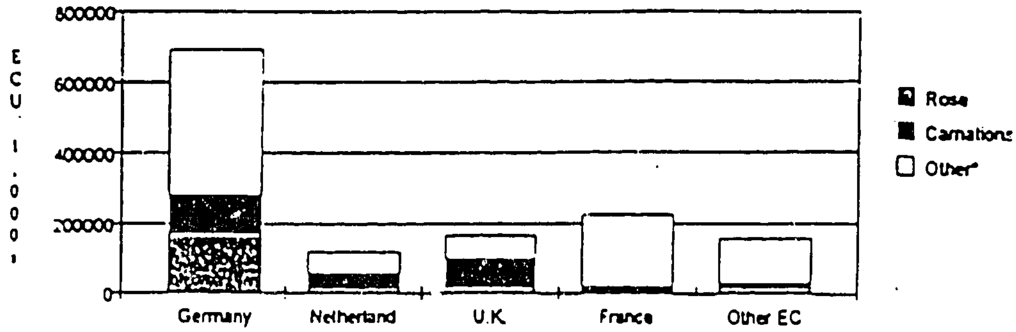
Trade in cut flowers and plants has become an important segment of international trade in horticultural products. Developing countries have been increasing their share of this trade and, in flowers for example, they have at present over 25% of total international trade in these products.

The 1991 value of world trade in floricultural products, of more than US$ 5 billion, represents a significant increase on earlier totals for the 1980's e.g.US$ 2.5 billion in 1985 and just over US$ 2 billion in 1981.

During the 1980s the largest growth rate was in plants, followed by cut flowers and finally by cut foliage. The share of these products in total world floriculture imports has increased from 13.7% in 1981 to 15.4% in 1985, to around 20% in 1991.

Germany is easily the largest import market for cut flowers followed by the USA (less than 50% of German imports), France, UK, Netherlands and Japan,which has replaced Switzerland, in sixth place.

Comparative EC Import Market Sizes, 1990 in ECU 1,000s



Source: Eurostat

* Does not include orchids/gladioli/chrysanthemum

As can be seen from Table I below, total value of world imports of cut flowers increased from $2,219,000,000 in 1987 to $3,362,000,000 in 1991. Dominating the world supply position is the Netherlands, with over $2bn. The next largest supplier is Colombia, but at a much lower level, with $389,000,000, followed by Israel, Italy and then a further significant drop to Thailand, Spain and Kenya.

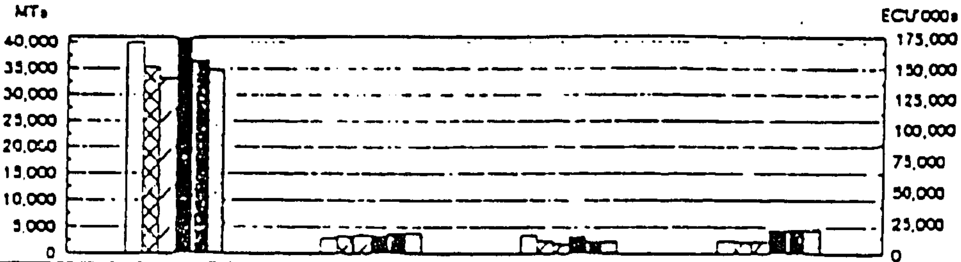
In 1991, Kenya exported cut flowers to the value of $53,230,000. This represented a steady increase in the five years since 1987, when its total exports amounted to just over $31m. The index of growth for Kenya over the five years is 169. This growth index is exceeded by Zimbabwe, which has a 1991/1987 figure of 543, although total exports from Zimbabwe in 1991 of $16,570,000 were well below those of Kenya.

Table 1: 1991 World Cut Flower Exports

	US$ Million	% of Total		US$ Million	% of Total
Netherlands	2,150.79	55.68%	New Zealand	17.95	0.46%
Colombia	689.47	17.85%	Australia	17.30	0.45%
Israel	145.80	3.77%	Zimbabwe	16.57	0.43%
Italy	113.08	2.93%	South Africa	16.39	0.42%
Thailand	76.84	1.99%	Peru	15.76	0.41%
Spain	70.31	1.82%	U.K.	15.42	0.40%
Kenya	53.23	1.38%	Costa Rica	15.01	0.39%
France	31.91	0.83%	Morocco	14.98	0.39%
USA	23.03	0.60%	Turkey	12.66	0.33%
Ecuador	22.01	0.57%	Others	305.74	7.91%
Singapore	19.90	0.52%	Total	3,862.98	100.00%
Mexico	18.83	0.49%	Source: UNSO/ITC COMTRADE DATA		

European Fresh Cut Rose Imports, 1988-1990

Select Countries

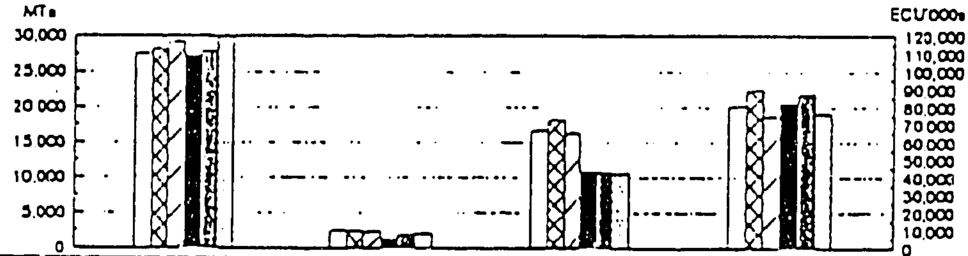


	Germany	France	Netherlands	U.K.
1990 - MTs	40,040	2,779	3,418	1,306
1989 - MTs	36,2[illegible]	3,294	1,306	1,291
1988 - MTs	33,271	3,306	1,848	1,700
1990 - ECU/000s	174,040	14,724	14,330	11,801
1989 - ECU/000s	154,[illegible]	10,221	10,134	10,2[illegible]
1988 - ECU/000s	144,473	10,[illegible]	8,471	10,[illegible]

Source: EUROSTAT

European Fresh Cut Carnation Imports, 1988-1990

Select Countries

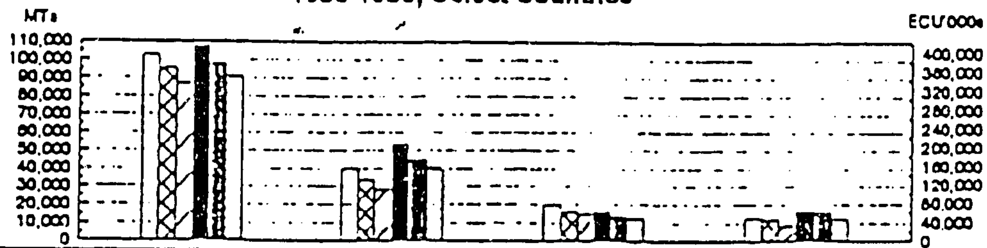


	Germany	France	Netherlands	U.K.
1990 - MTs	27,818	2,808	16,847	20,184
1989 - MTs	28,308	2,390	18,142	23,408
1988 - MTs	29,211	2,365	16,206	18,604
1990 - ECU/000s	108,402	5,846	43,867	80,426
1989 - ECU/000s	112,008	6,048	45,363	87,800
1988 - ECU/000s	116,829	6,347	42,148	75,877

Source: EUROSTAT

European Other Fresh Cut Flowers Imports

1988-1990, Select Countries



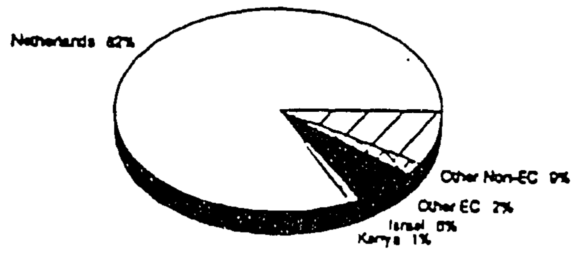
	Germany	France	Netherlands	U.K.
1990 - MTs	102,709	40,1[illegible]	19,[illegible]	12,[illegible]
1989 - MTs	[illegible]	[illegible]	14,302	12,131
1988 - MTs	[illegible]	30,[illegible]	14,740	[illegible]
1990 - ECU/000s	416,734	208,717	[illegible]	[illegible]
1989 - ECU/000s	373,[illegible]	173,448	[illegible]	62,004
1988 - ECU/000s	347,604	153,[illegible]	46,416	46,815

Note: ex rose/carnation/orchid/gladioli/chrysanth

Source: EURCSTAT

E.C. Import Market Share - Fresh Roses

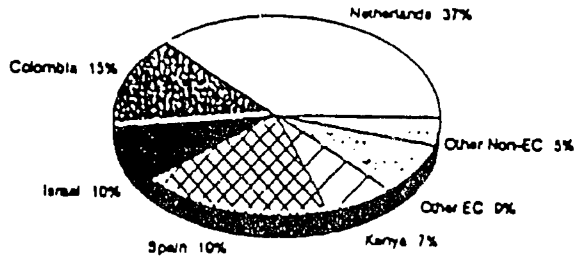
1990, based on weight



Source: EUROSTAT

E.C. Import Market Share - Fresh Carnations

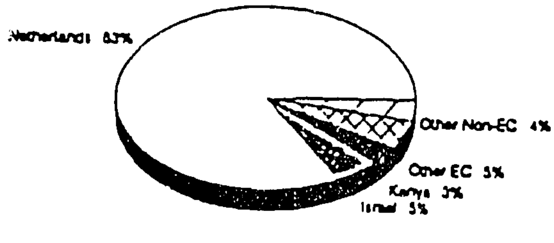
1990, based on weight



Source: EUROSTAT

E.C. Import Market Share - Other Fresh Flowers

1990, based on weight



Note: ex rose/carnation/orchid/gladioli/chrysanth
Source: EUROSTAT

SECTION I: FRANCE

Country Profile

France is the third largest importer of cut flowers in the world. Analysis shows that an estimated 90% of its imports are from other EC countries (mainly the Netherlands, with Germany, Spain, Belgium-Luxembourg and Italy notable but with much less quantity). Key distant suppliers being Morocco, Spain, Israel and Colombia. Kenya ships a substantial amount of miniature carnations and "other flowers" into France, the latter difficult to categorize since no breakdown is provided in French or overall EC import statistics.

Roses and carnations are the most popular cut flowers with the French consumer, with pastel shades and white preferred colors.

According to an ITC report entitled "Floricultural Products," (1987) most cut flowers imported from non-European countries are transported by air. The bulk of imports from developing countries arrive at the Paris airport, from which they are generally transported to other parts of the country by temperature-controlled trucks or by rail. Most European imports arrive by truck.

Market Distribution

According to the same ITC report on "Floricultural Products," an estimated 17,000 retail outlets sell flowers and/or plants in France. By far the most important type is the traditional florist shop, of which there are more than 10,000. An estimated 50% of all flower purchases are made in florist shops, with market and street vendors the second most important retailers (accounting for about 20% of all flower and plant purchases). Sales of floriculture products in supermarkets are modest in comparison (but growing).

The wholesale trade plays a dominant role in the distribution of cut flowers and foliage. Most imports of cut flowers and decorative cut foliage are handled through wholesalers. A third of the estimated 600 are located at the Paris-Rungis wholesale market, a third in Southern France (Nice, Antibes, Hyeres and Ollioules), and the remaining third in other areas (particularly Lyon, Lille and Bordeaux). Wholesalers import either direct or through large specialist importers, in addition to buying supplies from local producers.

Some exporters, particularly from the Netherlands, take over the distribution function and sell direct to the retail shops. Trucks from the Netherlands deliver to retailers in the main consuming centers assortments that have been packaged and bunched for retail. Several multinational flower trading companies have even established their own wholesale companies in France in order to promote sales in this expanding market.

The Import Trade

France has few very large flower importers, mainly located in Paris, or Nice. They handle a considerable proportion of imports from developing countries, distributing their products primarily to other wholesalers, rarely dealing with retailers other than the larger food stores. Traditionally, few retailers have imported directly, but this is changing with the increasing participation of the supermarket chain stores in the import trade.

Quality Standards

Freshness remains the most important factor in the flower trade. As supplies of cut flowers and foliage exported by the developing countries have to be shipped over long distances and are subject to changes in temperature and shocks during handling, exporters should pay careful attention to packing product to reduce risks of damage. Even though there are no official standards for packaging, importers prefer flowers packed in boxes of standard sizes. Proper grading according to color and size, regular supplies in sufficient quantities and punctuality of delivery are essential.

Import Duties and Regulations

Cut flowers from ACP countries enter the EC free of any customs duty.

ROSES

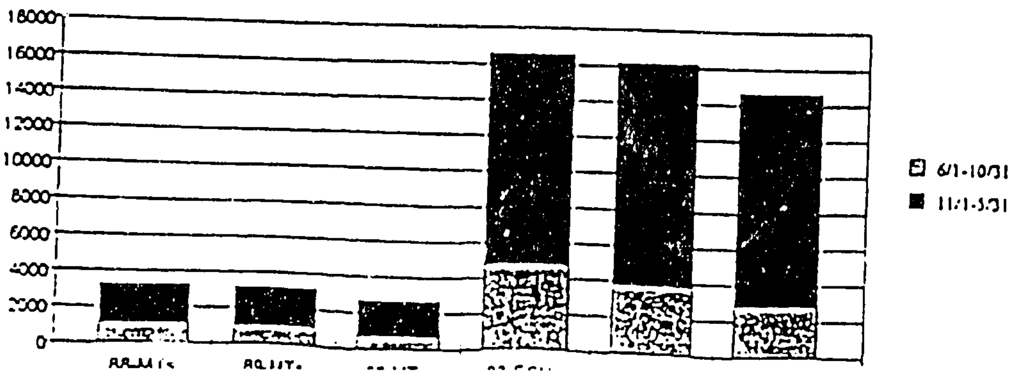
Domestic Production

France does have substantial domestic production along and near the Mediterranean coast, in particular the departments of Alpes-Maritimes and Var.

Imports

During the summer period from 1 June to 31 October, imports of roses into France amounted to 744 tons. During the winter period, i.e. from 1 November to 3 May, imports were at 2,026 tons, making an annual total of 2,770 tons. This compares with an annual total in 1988 of 3,300 tons. Overall, the market for imported roses has declined.

French Rose Imports by Period, MTs & ECU1000



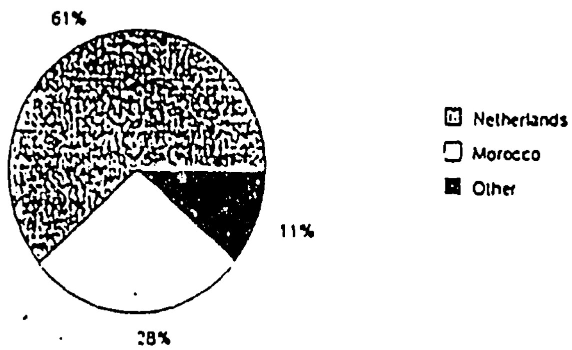
Market Share/Seasonality of Supply

The season for imports of fresh cut roses and buds is split into two periods: 1 June-31 October and 1 November-31 May).

Demand for imported cut flowers in the winter months is much higher than during the summer when domestically grown roses are available.

Main suppliers are the Netherlands and during the winter months, Morocco is the second largest supplier. In 1990, the Netherlands supplied a total amount of 1700 tons, Morocco 763 tons, Italy 88 tons, Israel 82 tons, Colombia 37 tons and the Canary Islands 16 tons. Kenya supplied a total of 536 tons to the EC, none to France.

French Rose Import Share, 1990 based on Weight



Source: Eurostat

Consumer Preferences

Over 50% of rose sales are of soft pink, e.g. "Lara", "Omega" and "Sonia." About 30% are red roses, mainly "Baccara," "Chamade," "Ilona," "Mercedes," "Samantha," and "Visa." The remaining 20% are of all other colors including pure white. According to trade sources, demand for white roses is particularly strong during April to June, the traditional period for weddings and First Communions. Overall demand peaks at Valentine's Day, Mother's Day, Christmas, and New Year.

Grades and Standards

Common EC standards apply (*see Appendix A*). Importers require flower buds to be of a uniform quality and size within a bunch; in particular, they demand uniformity of color, firmness of stalk and consistency of stem length.

CARNATIONS

Domestic Production

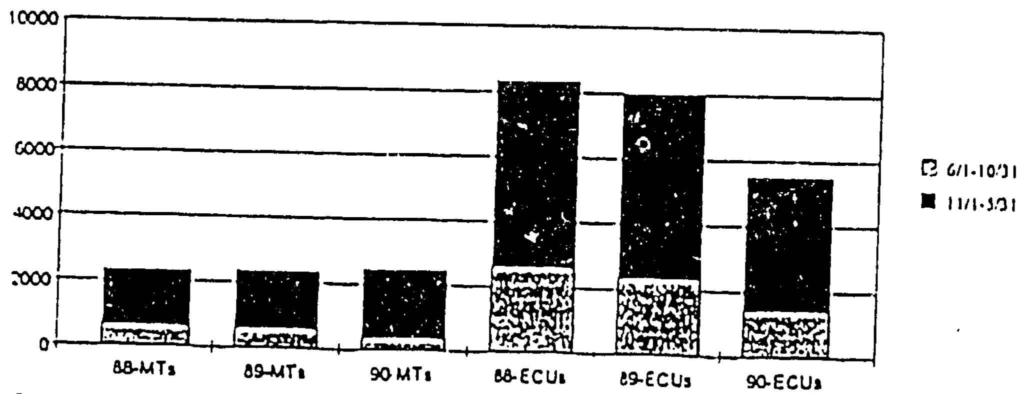
France is a large producer of carnations, and as with roses, the main production areas are along or near the Mediterranean coast, in particular the departments of Alpes-Maritimes and Var. An estimated 90% of the carnations grown are of the standard variety.

Imports

Since 1988, the market for imported cut carnations has slightly increased in size but decreased in value. In 1990, 2,508 tons of carnations were imported at a value of ECU 5.5 million compared with 2,353 tons valued at ECU 8.3 million.

According to discussions with French importers this month however, the market outlook for carnations is far superior to that of roses, and is expected to grow substantially. Colombian quality and consistency of supply according to our trade sources (*see Appendix D*) are thought to be superior to Kenyan. Both countries are increasingly into the supply of miniature (spray) carnations.

French Carnation Imports by Period, MTs & ECU1000

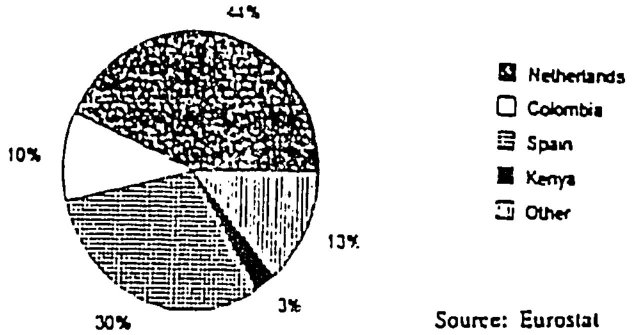


Source: Eurostat

Market Share/Seasonality of Supply

The majority of carnations are supplied by the Netherlands but during the winter, Colombia is the main source outside of the EC. During 1990 as a whole, the Netherlands supplied 1700 tons, Spain supplied 755 tons, Colombia supplied 254 tons, Germany 167 tons, Kenya 70 tons, Morocco 65 tons, Turkey 55 tons, Israel 33 and Italy 6.

French Carnation Import Share, 1990 based on Weight



Source: Eurostat

Consumer Preferences

The French consumer has a traditional preference for standard carnations, but the market for miniature (spray) carnations is rapidly growing in popularity, according to several French importers (*see Appendix D*). White and pastel shades are preferred over red, which is on the decline. Sales have seasonal peaks at Christmas, Mother's Day and Easter.

Grades and Standards

The EC quality standards for fresh cut flowers apply, and are included in Appendix A. Imports of standard carnations are.packed in boxes of 105 x 45 x 20 cm at 20 bunches to the box. Each bunch has 20 stems and is placed in perforated sleeves. Stem lengths vary from 40 to 60 cm; the longer stem lengths obtain higher prices.

STATICE

There are no individual import statistics for the category "statice" but as with the rest of Europe, "summer flowers" are in great and growing demand (statice or "limonium" fall under this heading). The French import market for "other flowers" in fact is currently greater than for roses and carnations combined. There is a large domestic production capacity, and the Netherlands is a huge supplier, but there is a definite potential of market windows during the winter months. The problem comes in with assuming that statice is making up a large percentage of the "other flowers" category -- dialogue with Kenyan flower exporters might provide a clearer indication of trends in this area, and if interest is expressed, further research would be warranted.

SECTION II: GERMANY

Country Profile

Germany is by far the largest import market for flowers, purchasing $1,245,000,000 worth of product in 1991. This represents a steady growth since 1988, where imports were at $881,000,000.

The major supplier of cut flowers to Germany in 1991 was the Netherlands, which supplied over US$1bn worth of total German imports, i.e. 85%. Other suppliers, although at significantly lower levels, were Italy with $66,000,000, Israel, with $24,000,000, Colombia with $23,900,000 and Kenya, with $17,720,000. Unit value for Kenyan exports was at US$3.50 per kg, which was below the figures for the other major suppliers, with, for example, Italy attaining a unit value of US$8.48 per kg and Colombia with US$6.10 per kg.

Per capita consumption of cut flowers in Germany is the fourth largest in Europe after the Netherlands, Italy and Switzerland and averages at around 65 Dutch Guilders (Dfl)[1] per annum.

Roses, Carnations and Chrysanthemums are the most important cut flowers in the German market, with average expenditure of 16 Dfl on roses, 12 Dfl on Carnations, 10 Dfl on Tulips and 7 Dfl on Chrysanthemums.

Market Distribution

There are a significant number of wholesale markets for cut flowers in Germany. The largest are in Hamburg, Dusseldorf and Cologne. The number and size of these markets, however, has declined with increased competition from direct sales to florists, secondary wholesalers and supermarkets. These sales are mainly done by wholesalers in the Netherlands.

There are four producer-owned auction markets, the largest are the UGA-Niederrhein, and NBV Neuss. All four auctions are under the same management and all operate a Dutch-style clock auction system. Although they are less important than in the Netherlands, it is of note that they were used extensively by Israel and indeed, some product from Zimbabwe has been using these channels.

There are an estimated 2,000 wholesalers of cut flowers in Germany, many of whom will import flowers directly, mainly from the Netherlands. There are also around 10 large importers based in Frankfurt, several which are subsidiaries from Netherlands companies.

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[1] Figures are in Dutch Guilders because the source of these estimates is the commercial import department of the Westland auctions in the Netherlands.

Importers normally buy on a fixed price basis, with prices established weekly or monthly. Considerable caution is needed, however, in selecting an importer and the more powerful ones will only buy on a firm basis during peak periods of demand, preferring to trade on a consignment basis when flowers are in surplus.

Generally, there is no shortage of cut flowers in Germany and a successful marketing strategy is totally dependent on maintaining consistent high quality standards. Linked to high quality standards is the requirement for high packaging standards and reliable and regular deliveries.

ROSES

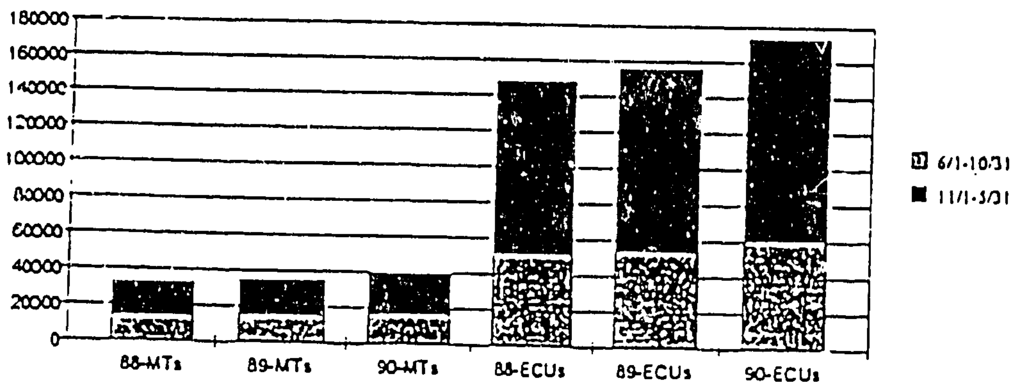
Domestic Production

Domestic production of roses is substantial and, unlike the UK, has withstood competition from foreign producers, particularly the Netherlands. National glass-house rose production is estimated to account for around 35% - 40% of total rose supply, with an estimated glass-house production area of around 250 hectares.

Imports

During the whole year, in 1988, total imports of roses into Germany amounted to 33,000 tons. By 1990, this total amounted to over 40,000 tons, an increase of 25%.

German Rose Imports by Period, MTs & ECU1000

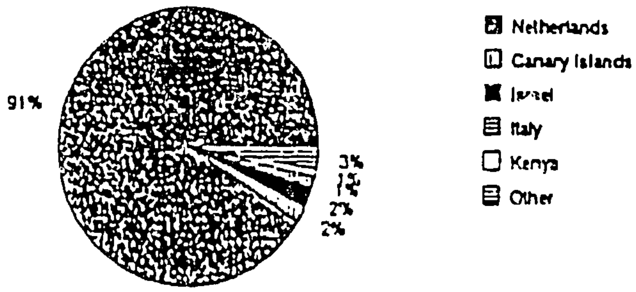


Source: Eurostat

Market Share/Seasonality of Supply

Imports of roses are split into two periods, viz, 1 June to 31 October and 1 November to 31 May. The major supplier of roses to Germany is the Netherlands, providing over 90% of total supply. On average, during the summer period from 1 June to 31 October, the Netherlands provides over 96% of total German imports, with its contribution falling to around 80% in the winter period from November through May. During the summer period in 1990, the only other suppliers, of any note, of roses were the Canary Islands and Israel. During the winter period Israel, Italy, the Canary Islands, Kenya and Colombia were the main suppliers, although again, each supplied less than 1,000 tons compared with the Netherlands' 19,700 tons.

German Rose Import Share, 1990 based on Weight



Source: Eurostat

Consumer Preferences

Consumer preferences in Germany are almost identical to those for the Netherlands. It is estimated that around one third of imports are large flower varieties. Although it is claimed that the German market is extremely quality conscious, several importers have commented on the competitiveness of the market, with only few buyers prepared to pay a premium for first quality. Presentation is extremely important.

Roses from Africa have a mixed reception in Germany, due to inferior grading and packing, although they can compete in the December through February period. In many cases, however, they are unpacked, the stems re-cut and placed in water before being re-sold.

Prices

Although Germany is by far the largest single market in Europe for roses, it is highly competitive and most of the evidence seems to point to the fact that prices obtainable in Germany are unlikely to differ significantly from those of the Netherlands. Essentially, prices on the German market closely follows those established in the Dutch auctions.

High prices can be obtained for imports from December to mid-February, but prices collapse once the Netherlands production starts increasing. Colombia and Ecuador are now reported to be forced out of the market after mid-March.

Kenyan Sulmac roses are reported as being the best presented of African suppliers, but are still reportedly sold at a 20% discount to Israel.

Varieties and Specifications

See Appendix B for standards of Israel/Agrexco export quality roses, which, if followed, would gain market success.

Pink shades are popular and account for around 50% of total demand, followed by red, orange and yellow. White roses have also increased in popularity over the last few years.

Stem length is a major consideration, the highest prices normally being obtained for long stemmed roses. The stem must also be firm and consistent. Flowers within a container must be of uniform size, maturity and stem length.

Standards

The EEC quality standards for fresh cut flowers and ornamental foliage are laid down in Regulation (EEC) No: 316/68 - *see Appendix A*. These standards apply for all flowers imported into the EEC.

Import Duties

Cut flowers from ACP countries enter the EEC free of any customs duty.

Market Opportunities

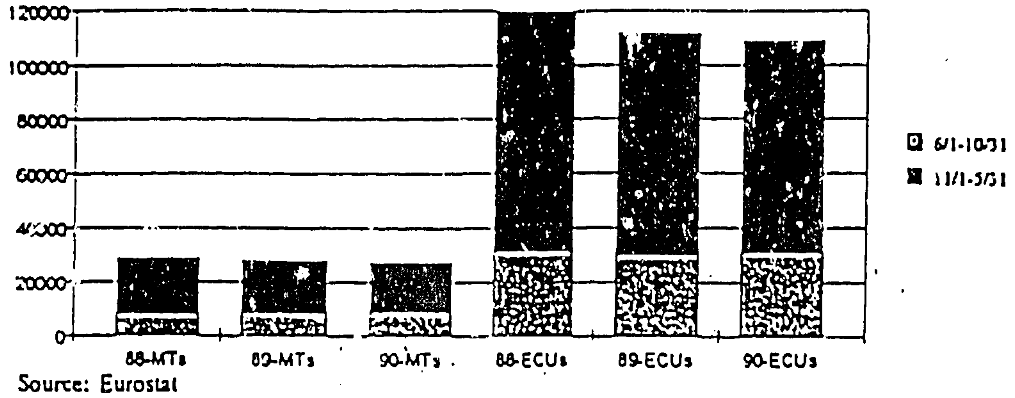
Flowers from Africa do not have a very good market image (except for certain suppliers from Kenya and Zimbabwe) and none compares favorably (in the eyes of German importers) with product from the Netherlands, Israel or the Canary Islands. German importers do not want to re-pack and re-grade and like to have the confidence to sell a box without even opening it. Nonetheless, the fact that Kenya already exports roses to Germany signals that with increased quality, a larger market share might exist (particularly if Israeli standards could be imposed).

CARNATIONS

Imports

During the summer period from 1 June to 31 October 1990, imports of carnations into Germany amounted to 8,904 tons. During the winter period, i.e. from 1 November to 31 May, imports were at 18,712 tons, making an annual total of 27,616 tons. This compares with import totals of 29,214 tons in 1988 and 28,206 tons in 1989. These fluctuations in the size of the import market have been consistently the case throughout the 1980s, with the mid-1980s particularly being a case of relative decline in the market.

German Carnation Imports by Period, MTs & ECU1000



Source: Eurostat

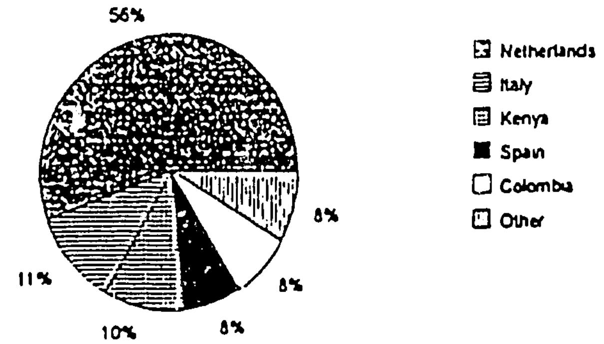
Market Share/Seasonality of Supply

The major supplier to Germany in 1990 was the Netherlands, with a total amount of 15,327 tons or 55% of annual imports. During the summer period, however, the Netherlands supplied over 74% of total imports, whereas during the months from November through to the end of May, its contribution fell to 46.6%, even though, in actual tonnage terms, it supplied larger quantities.

Kenya overtook Colombia as the second largest supplier of carnations to Germany in the summer period in 1985 with 12% of the market. At that time, Colombia had 8%, Italy 5% and Spain, Israel and France all with less than 1%. During the Winter months of 1990, there were a number of suppliers producing between 1500 and 2800 tons, viz. Italy, Spain, Kenya, Colombia and Israel.

During 1990 as a whole, out of total Kenyan supplies of 4,738 tons to all EEC countries, Germany imported 2,741 tons, making it easily the largest importer of carnations from Kenya.

German Carnation Import Share, 1990 based on Weight



Source: Eurostat

Consumer Preferences

The clear preference in Germany is for spray carnations and an estimated 60% of total sales were of this sort.

The dominant colors for standard carnations are red, pink and, to a lesser extent, white, although yellow, orange and unusual colors are also acceptable.

For spray carnations, color preference is less distinct and according to trade sources, no single color accounts for more than 50% of demand. White, yellow and bronze tend to be the most acceptable.

Prices

The carnation market is an intensely competitive one because there is general over-production worldwide. Spain and other Mediterranean countries are increasing their presence in the market and prices are showing the effect of this increased supply.

Standards

EC standards apply - *see Appendix A*.

Standard variety carnations must be at least half open. A minimum of three buds showing color are required for Class 1 spray carnations.

Standard carnations are normally packed 20 stems to a bunch, frequently in perforated sleeves. Spray carnations are usually packed 10 stems to a bunch.

Market Prospects

Intense competition makes it an extremely difficult market to enter. The same forces, however, have reduced the feasibility of producing carnations within the major European markets themselves and this has created a certain window of opportunity. Kenya is an established supplier of carnations to the German market and all efforts should be made to continue the situation.

STATICE (LIMONIUM)

Note: Statice is not distinguished separately in the Eurostat tables and thus no information is available on the market per se, though we have included an overview:

Imports

For flowers other than roses, carnations, chrysanthemums, gladioli and orchids, imports are substantial, although totally dominated by the Netherlands. In 1988, for example, some 87,000 tons of "Other flowers" were imported, of which the Netherlands supplied 79,000 tons. Flowers falling under this category include statice, solidaster, ammi majus, molucella, aster ericoides, trachelium, phlox, and dianthus barbatus.

Standards

EC quality standards apply and a phytosanitary certificate is required from non-EC countries.

Import Duties

ACP countries have duty-free access.

Market Opportunities

The market for non-traditional flowers did expand during the 1980s, although, without actually doing field research it is practically impossible to get accurate details on a flower by flower basis. To a large extent, however, all these "filler" flowers are imported from the Netherlands which, in turn, re-exports the majority of its own imports. Even the Israeli marketing board, Agrexco, consigns twice the volume of filler flowers to the Netherlands as it does to Germany. The only real opportunities are in winter months.

SECTION II: NETHERLANDS

Country Profile

In 1991, the Netherlands was the fifth largest importer of cut flowers in the world, following Germany, the USA, France and the UK. Total imports in 1991, amounted to 51,000 tons at a value of US$185m. This represented a steady increase from the 30,240 tons imported in 1987. In fact, the largest percentage increase occurred between 1990 and 1991, when imports increased from 42,730 tons to 51,030 tons.

The Netherlands is more renowned for its export performance rather than for its imports. It is by far the largest world exporter of floricultural products and in 1991, for example, its exports were valued at US$2,150,790,000 or 64% of total world trade in cut flowers.

The Netherlands has, over the last ten years, exported, on average, more than 10 times the total value of its imports, giving a clear indication not only of its re-export capability, but of the intensity of domestic production.

Netherlands' Imports and Exports of Cut Flowers 1981 - 1991 (in million of Dutch Guilders)		
Year	Imports	Exports
1981	125.2	1,681
1982	137.2	1,800
1983	143.3	1,962
1984	193.3	2,211
1985	164.8	2,419
1991	337.2	3,771

Source: Imports/Exports: Central Bureau voor Statistick, The Hague (1981-1985).
EUROSTAT, Microfiches NC Module 1111/1112 (1991) (Luxembourg)

The major supplier of flowers to the Netherlands in 1991 was Israel, with 14,890 tons, followed by Spain in value terms with 7,770 tons valued at US$28.52m and Kenya in volume terms, with 13,870 tons at a value of US$25.47m. Average unit value of Israeli produce in 1991 was $3.63 per kilo. Unit value for Israel was $4.62, for Spain $3.66, For Zimbabwe $3.80, and for Kenya, $1.83. Of the 37 supplying countries to the Netherlands in 1991, Kenya recorded the lowest unit value, according to the Comtrade database system of the International Trade Centre.

Market Distribution

There are no wholesale markets of the type found in the United Kingdom and Germany. With few exceptions, all Netherlands cut flower production is sold through the auctions.

The auctions sell and guarantee payment to the producer (within 7 days), and provide - on a rental basis - buckets, trolleys and, in certain circumstances, packaging materials. The producer pays a commission charge of between 4.6% and 8% of the sale price.

There are a total of 10 flower auctions under the Federation of Dutch Flower Auctions (VBN). The three largest auctions, Aalsmeer (VBA), Naaldwijk (Westland) and Rijnsburg (Flora)_ accounted for 89% of cut flower sales in 1989.

The Import Trade

The majority of imports continue to be handled by the many specialist import-export companies. In the past it has been difficult for new entrants to gain access to the auctions, but in recent years, the three main auctions have actively sought increased imported supplies so as to provide a continuity of supply year round.

The share of imports on the three major auctions is around 7% and all three have the objective of increasing the share of imports to 10-12% of total supplies.

The auctions have stringent quality standards and these organizations will only grant an import license to a supplier providing they are satisfied that quality is of a satisfactory standard and continuity of supply can be maintained.

The auctions provide foreign suppliers with a valuable preparation service. Flowers on arrival at the auction will be unpacked. If necessary, the base of the stems will be re-cut and the flowers will be placed in buckets of water. With roses the cardboard packaging is removed and the flowers are re-packed in film.

The Import Companies

The majority of imports are often still bought on a fixed price basis by importers. It is, however, increasingly common for importers to trade on a consignment basis with a commission charge of 10% being the average.

In practice, the majority of importing companies are also active participants in the export trade, as well as in the domestic Benelux trade. Importers will also be buying off the auction and within their premises will offer their customers a complete range of services which will include bunching, preparation of bouquets and re-packing. Their customers will include retail florists, supermarkets, primary and secondary wholesalers.

Many importers will also place imported flowers on the auction. In these circumstances, the supplier will pay all the auction charges as well as the importer's commission charges. Whilst this may appear to be an unnecessary additional cost to the exporter of consistent high quality flowers (i.e. an extra commission charge), the importer may well be in a position to sell a consignment which may have been heavily discounted for defects by the auction inspectors.

Auction Quality Standards

In addition to the preparation of flowers for auction, all flowers are inspected prior to sale and each consignment is given an inspection code. The various codes are as follows:

Inspection Code	Defect
00	No remarks
1	Flower not perfect/damaged
2	Supply phase incorrect
3	Sorting - unequal lengths
4	Stalk - limp, curved
5	Foliage deviations
6	Pest - aphids, red spider, thrips, etc.
7	Fungi - botrytis, mildew, etc.
8	Growth deviations
9	Warning code.

Source: Westland Flower Auction

Products may be given a combination of two codes if there is more than one defect, and if there are more than two defects, the product may be withdrawn from the auction. These quality standards are constantly under review and it is probable that in the future, consignments will also be subject to a mandatory bacterial count on the basal system. A high bacterial count signifies a reduced vase life.

In circumstances where products are in over-supply, it is not uncommon for buyers to only buy products with nil defects, or, at worst, only very minor defects. The presence of a serious defect can easily reduce prices by up to 50% and a minor defect by 5-10%. Given the problems of controlling quality during transit, there is a strong argument in favor of appointing an import agent to ensure that only high quality flowers are placed on the auction.

Marketing Strategy for the Netherlands

The Netherlands has some of the largest and most highly efficient cut flower producers in the world. Located as they are near to the auctions, they are in a position to supply and present flowers to the highest quality standards. Alongside Dutch production are supplies from Israel, where quality standards are also high. Israel also, on occasion, is not immune from quality problems, but through Agrexco, Israeli producers have been able to achieve a reputation for consistent high quality. Kenyan producers are competing with very large and efficient organizations who have access to comprehensive technical and research services.

Unless quality standards can be maintained at a very high level, the long-term prospects in the Netherlands, given continued expansion of product in Spain, Turkey, and, of course, by the Netherlands' own producers, are at best open to increased competition. Prices are likely to continue to decline in real terms. Furthermore, unless inconsistent quality can be eliminated, there can be no future for direct access to the auctions. In short, the viability of the Kenyan floricultural industry is dependent upon its ability to maintain consistent quality supplies.

ROSES

Domestic Production

The Netherlands is the largest producer of cut roses under glass in the world. The area under glass has increased from 650 hectares in 1975 to 758 hectares in 1985 and to 900 hectares in 1990.

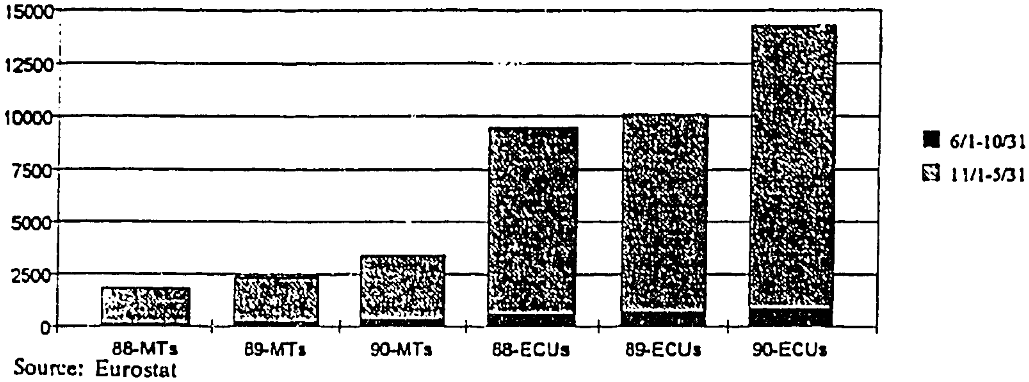
The principal varieties grown in the Netherlands are:

> large flower roses: "Madelon" (red), "Sonya" (pink), "Kacaranda" (red), "Athena" (light yellow), "Darling" (light pink).
>
> small flower roses: "Motrea" (red), "Frisco" (yellow), "Europa" (pink), "Mercedes" (red), "Carolein" (pink).
>
> spray roses: "Everlien" (pink), "Joy" (red), "Porcelina" (cream) "Pink Delight" (pink), "White Dream" (white), "Nikita" (red).

Imports

In 1991, imports of roses amounted to 172.9 million stems, showing a remarkable increase in the 7 years since 1985 when imports were at a level of 31.3 million stems. The largest increase in imports occurred during 1991 with an increase of 60 million stems over the total of 112 million stems for 1990. On average, imports represent about 5% of total rose supply in the Netherlands.

Dutch Rose Imports by Period, MTs & ECU1000

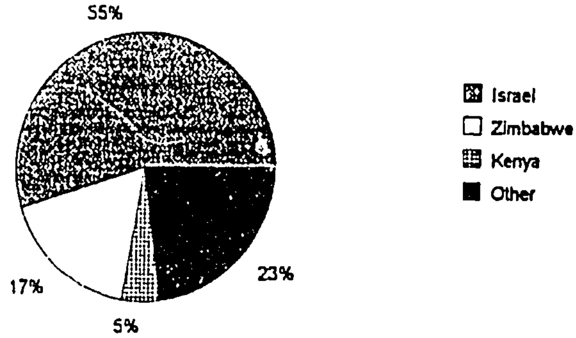


Source: Eurostat

Market Share/Seasonality of Supply

The major supplier of roses to the Netherlands in the summer period from June to 31 October, was Israel with 116 tons. During that period, however, the Netherlands only imported 308 tons. During the winter period, from 1 November to 31 May, the Netherlands imported 3,107 tons in 1990, with Israel again being the largest supplier with 1,761 tons. The next largest supplier was Zimbabwe, with 588 tons, followed by Kenya with 165 tons and Morocco with 155 tons. The other suppliers were the Canary Islands, Colombia, Ecuador and Brazil.

Dutch Rose Import Share, 1990 based on Weight



Source: Eurostat

Consumer Preferences

Color preferences tend to be for pink (55%), red (17%), orange (12%), yellow (7%), white (4%) and other colors (4%). There has also been an increased demand for small flowered roses.

Prices

Highest prices for imported roses are received in December, January and February, when they get a premium over Netherlands production. In all other months, however, the imported product is discounted over domestic produce.

Significantly higher prices are obtained for long-stemmed, high quality roses in the range of colors and varieties identified above.

Standards

EEC standards apply - *see Appendix A*. Also, it is recommended that potential exporters follow Israeli (Agrexco) rose export standards (*see Appendix B*).

The flower bud must be at a sufficiently advanced stage to ensure that it will open. Roses are graded by stem length (including the bud) in multiples of 5cm.

Market Opportunities

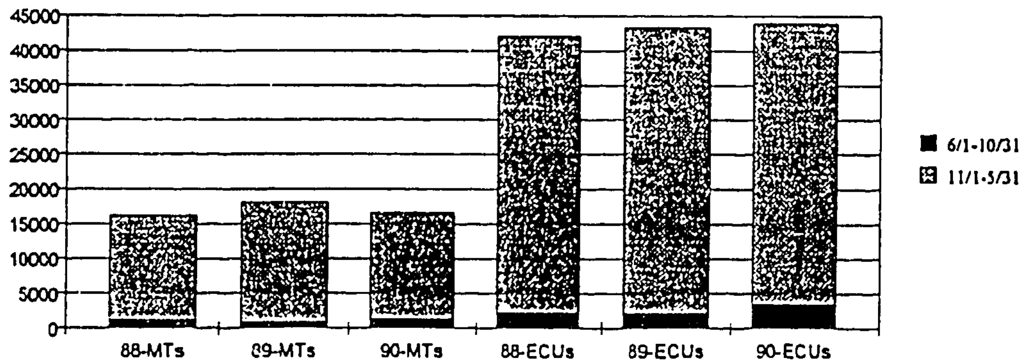
Opportunities are limited because of the enormous domestic production. The profitability of rose exporting to the Netherlands is firmly linked to the production of consistent high quality product and timing in the market between December and February. Dutch companies, however, have during the last few years, created partnerships with suppliers in certain African countries. Experiences have been mixed and there is a general lack of enthusiasm at present for such arrangements.

CARNATIONS

Imports

Carnations are by far the major imported flower to the Netherlands. In 1991, 582 million stems were imported at a value of 122.4 million Dfl. Although the 1991 figure was a significant increase over the import levels of around 200-300 tons from 1981 to 1985, there has not been much change in the market since 1989, when 563 million stems were imported.

Dutch Carnation Imports by Period, MTs & ECU1000

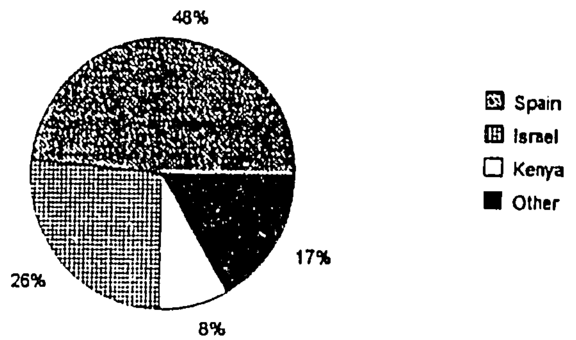


Source: Eurostat

Market Share/Seasonality

During the summer period from 1 June to 31 October, the Netherlands imported 1,287 tons of carnations. The major supplier was Spain, with 433 tons, followed by Germany with 282 tons, Kenya with 276 tons and Colombia with 174 tons. During the winter period from 1 November to 31 May, total imports amounted to 15,360 tons. The major supplier by far was Spain, with 7,637 tons. Other suppliers of note were Israel, with 4,400 tons, Kenya with 1,000 tons and Germany with 875 tons. Less important suppliers were Colombia, Turkey and Italy.

Dutch Carnation Import Share, 1990 based on Weight



Source: Eurostat

Consumer Preferences

During the 1980's, sales at auctions indicated a clear preference for spray varieties, such as "Silvery Pink", "Barbara", "Karina", "Royalette", Bagatelle", "Ministar", "Red Barron", "Bianca", "Elsy" and "Adelfie".

Standard carnations in demand were "White Sim", "Scania", "Tanga", "La Reve", "Nora", "Pallas", "Lina", "Serena", "William Sim" and "Casterello".

Standards

EC standards apply.

Firmness and strength of stalk is a primary determinant of quality, but actual specifications differ according to variety and time of the year. Flowers of standards must be at least half open.

Three ripe buds are required for Class 1 carnations in the spray varieties.

Flowers and bunches in one lot must be of uniform quality.

Standard carnations are packed 10 stems to a bunch, with no specific requirement for stem length.

Many different box sizes are used - *see UK chapter.*

Market Opportunities

The 1980's saw increasing periods of over-supply, with the consequent slump in prices. The Netherlands itself is a major producer of carnations and imported carnations are only really in demand in the winter period. There is increasing competition from Spain and Turkey, however and it is likely that the market will become increasingly competitive with ever smaller windows of opportunity.

STATICE

Imports

Statice is not distinguished separately in the import statistics for the Netherlands, but included in the "other flowers" category. As a statistical group, 25,230 tons were imported into the Netherlands in 1991 at a value of 158 million Dfl, thus making them, as a group, the most valuable of the imported flowers.

Flowers in this category include Gypsophila, Statice, Aster, Delphinium, Trachelium, Liatris, Solidaster, Ammi Majus, Phlox Peniculata, Astilbe, Achillea, Solidago, Eryngium and Molucella.

A large number of different species of summer flowers are produced in the Netherlands, both under glass and in the open. Generally, the total supply of many of these species is small by comparison with the mainline items and as such they are vulnerable to over-supply. An idea of the level of domestic production can be gained from the import-export statistics which, for 1989, show exports of 144,075 tons in this category and imports of 14,746 tons.

Market Share/Seasonality of Supply

Although imports occur throughout the year, the majority, around 90% enter the Netherlands during the period 1 November to 31 May. During this period in 1990, the Netherlands imported 17,154 tons, of which Israel, traditionally the largest supplier of these flowers in winter months, supplied 6,192 tons. The next largest supplier was Kenya, with 4,983 tons, followed, at a considerably lower level, by Zimbabwe, with 1,781 tons, the UK, with 944 tons (daffodils), and Ethiopia with 914 tons. Kenya exported practically all of its total 1991 EC exports to the Netherlands.

Standards

No clear standards apply, but because they are vulnerable in periods of over-supply, high standards of post-harvest handling are essential if quality is to be maintained and prices stabilized. The flowers are relatively easily grown at low costs of production and therefore the market is extremely vulnerable.

Market Opportunities

The Netherlands is the most important and easily accessible market for exporters of summer flowers, including statice. Quality is of critical importance, however, and for many species there has been a pattern of high prices, followed by increased volumes, over-supply and the inevitable decline in prices.

Continuity of supply is also of critical importance, and all Dutch importers and auction operators stress the need for such continuity. To some extent, it is therefore essential to have production under plastic, especially during rainy seasons.

It is probably also important for any supplier to have a range of flowers available. Auctions and major importers in the Netherlands are not interested in a supplier who could only provide one variety for say, two months of the year. If, however, the exporter has roses, carnations or some other volume product and can also provide a continuity of consistent quality, then these minor flowers can be marketed on the back of the volume items.

SECTION III: UNITED KINGDOM

Country Profile

The market for cut flowers in the UK has grown markedly in recent years. In 1989 imports reached nearly 50,000 tons and although this total fell marginally in 1990, it had increased to 52,200 tons during 1991. The value of the market has increased steadily from $176.59bn in 1987 to $305.6bn in 1991.

The Netherlands is by far the major supplier, contributing $205.6bn worth of imports during 1991 - 67.3%. The next largest supplier was Colombia with $39m, Israel, with $19m, Turkey with $9m and Spain with $8.6m.

In 1991, Kenya was the eighth largest supplier of product to the UK, valued at $2.6m and 670 tons.

In general, consumer demand tends to be conservative, concentrating on traditional varieties such as carnations, roses and chrysanthemums. There are also some other flowers such as iris and lily which are imported in moderately large quantities. In comparison with many other European countries, the UK consumer is relatively conservative and demand for exotic types of flowers is relatively small.

Kenya is known mainly as a supplier of carnations. Zambia and Zimbabwe are also known on the market as suppliers of gladioli and roses.

Market Distribution

There are a total of 19 wholesale markets in the UK where flowers are traded. Of these, only one, New Covent Garden, has a section solely for cut flowers. In most other markets, there are 2 - 5 flower wholesalers working alongside many fruit and vegetable wholesalers. Although many of the market wholesalers would consider themselves as importers, in practice the majority are agents, selling flowers from UK and overseas on a commission basis. Many of these companies also trade heavily in Dutch flowers, buying off the Netherlands auctions and thus taking title to the flowers. It is only in times of surplus that Netherlands flowers are traded in the markets on a commission basis.

There are a comparatively small number of large flower importers based at Covent Garden. In recent years, however, many of the major Netherlands import-export businesses have opened branches in the UK. Also, many importers are now investing in packing facilities in an attempt to gain access to the growing bouquet trade in supermarkets, multiples and other retail outlets.

The rapid expansion in imports from the Netherlands has been accompanied by the growth of

Dutch wholesaler activity in the UK. These entrepreneurial traders are nicknamed "Flying Dutchmen", who buy speculatively on the Aalsmeer auction, load their own trucks and deliver direct to retailers in the UK. Many secondary flower wholesalers are also now supplied by these companies. There is increasing evidence that whilst the volume of sales through the traditional wholesale markets is increasing, their share of the total wholesale trade is declining.

The Netherlands has targeted the UK as a market with major potential for growth. With the currently low level of consumption, it is argued that the key to expanding demand is to increase the number of sales outlets for cut flowers and to encourage consumers to buy flowers on a regular and impulse basis. For Kenya to further develop the UK market, it would be important to identify a partner in the UK which can organize distribution in a way acceptable to supermarkets and other secondary wholesalers.

ROSES

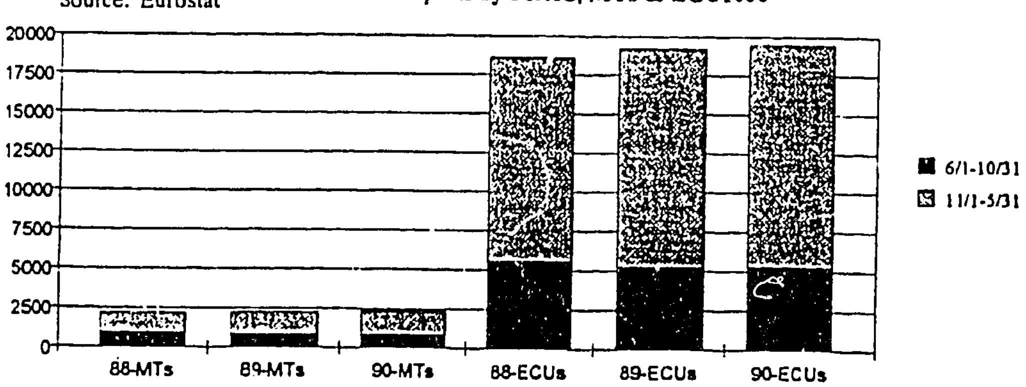
Domestic Production

Production of roses under glass has declined steadily in England and Wales, although there has been some slight expansion of rose production in the Channel Islands. The area under glass in England and Wales has dropped from 36 hectares in 1975 to just under 13 hectares in 1990.

Imports

In 1990 the UK imported 2,339 tons of roses, of which 1,511 tons were imported during the winter period from 1 November to 31 May. During that period, Kenya supplied 49 tons. The Netherlands dominates the supply of roses to the UK in the summer period, whereas in the winter period it is still the largest supplier, although Israel also has a significant presence on the market.

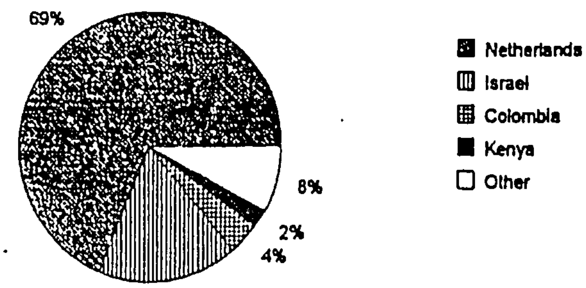
Source: Eurostat U.K. Rose Imports by Period, MTs & ECU1000



Market Share/ Seasonality of Supply

Although small quantities of UK-grown roses are available all the year round, supplies are augmented by imports mainly from Israel and the Netherlands. European production declines rapidly during winter months and demand is buoyant at this period. There are also surges in demand for roses during festive periods and special occasions in the UK, such as Christmas, Easter, Mother's Day, Valentine's Day, New Year and weddings, which occur all the year round, but mainly at Easter and spring-time.

U.K. Rose Import Share, 1990 based on Weight



Source: Eurostat

Consumer Preferences

It is the dark red rose that is the most popular in the UK, followed by the pink. White and yellow are also increasing in popularity, but not to the same extent as reds and pinks. Generally, however, any supplier can find a market for a mix of red, pink, yellow and others on a 50%, 30%, 10% and 10% basis respectively.

While there has been a traditional preference for red roses, there are reports that attitudes are changing. It is important to remember, however, that per capita consumption of roses in the UK is exceptionally low, although it has doubled from 1 to 2kg per person between 1987 and 1990.

Prices

There are no reliable wholesale market price reports on UK markets, but, invariably, rose prices are higher than those prevailing in the Netherlands auctions.

Varieties and Specifications

Specially bred greenhouse roses of "Rosa X" hybrid are required by the market. These can be divided into four groups:

Large flowered, hybrid Tea, e.g. "Athena", "White Success", "Jaguar", "Ilona", "Carambole", "Baccarra", "Madelon", "Pink Sensation", "Sonja" and "Cocktail".

Medium-flowered hybrid Tea, e.g. "Gabriella", "Cardinal", "Mercedes", "White Success", Jack Frost", "Belinda".

- Small-floribunda, e.g. "Garnette", "Carona", "Montrea" and "Sabrina" - these are the least popular group.

- Spray roses. A market for these has developed in recent years, although it is limited. Examples are: "Vanessa", "Joy" and "White Dream".

The length and condition of the stem is as important as the flower. Stem length varies according to type and in general, long straight, thick stems with perfect leaves are preferred.

- large-flowered hybrid Tea - 60-80cm preferred: 50-60cm acceptable.

- medium-flowered hybrid Tea - 50-70cm preferred; 40-50cm acceptable.

- small-flowered floribunda - 40-50cm preferred; 35-40cm acceptable.

Bunches should be placed in a strong, corrugated, telescopic carton, with lid and ventilation holes. The IATA approved Dutch 'A' size carton, 120 x 46 x 25cm, holds 600 blooms (60 times 10's) of 60-80cm length and is charged by airlines on a weight/volume basis at 23kg.

Standards

Common EEC quality standards apply - *see Appendix A*; a phytosanitary certificate is required..

Import Duties

ACP countries have duty-free access to the U.K..

Market Opportunities

The UK is a larger import market than the Netherlands for roses and is rated by Dutch exporters as a market with considerable potential for expansion. The key to gaining access to the UK is in reaching secondary wholesalers and supermarket suppliers.

African roses do not have an excellent reputation and are regarded as generally looking unattractive, with uncompetitive packaging and presentation. Traders also argue that there are usually a few partially opened and bruised flowers.

Improved production standards and grading in Kenya can overcome this, however, and some exporters already have a reasonable reputation. Accessing the expanding bunch/bouquet trade in the United Kingdom will require making contact either with a specialist supplier to supermarkets and retailers who can organize re-packing within the UK, or improving the packaging presentation and condition of roses before leaving for the UK market.

CARNATIONS

Domestic Production

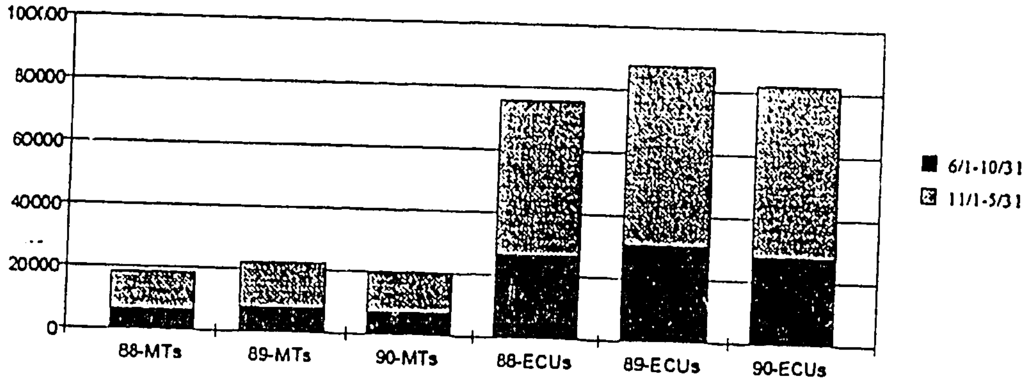
Domestic production in the UK is declining on an annual basis. The Netherlands and Colombia dominate the market, with high quality imports and increasing supplies are now coming from other EC countries such as Spain and Italy and associate countries such as Turkey.

Carnations are not widely produced in private gardens in the UK, unlike roses and chrysanthemums, and there is a therefore a year-round demand for imports.

Imports

Total imports of over 20,000 tons in 1990 represented a reduction in imports from the 22,400 tons recorded for 1989, although the 1990 figures were higher than those recorded for 1988 (18,604 tons).

Source: Eurostat U.K. Carnation Imports by Period, MTs & ECU1000



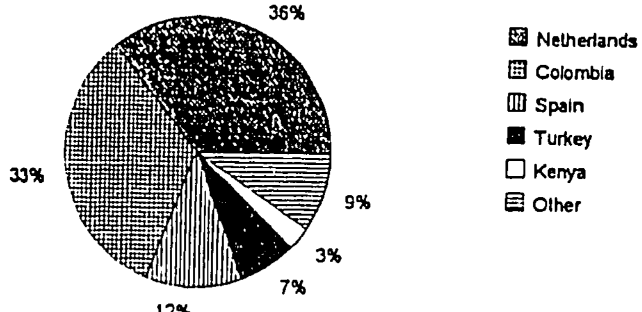
Market Share/Seasonality of Supply

In 1990, total imports of carnations into the UK amounted to 20,154 tons, of which 15,360 tons were imported in the winter period from November through May. During that period, the major supplier to the UK was Colombia, with just over 4,000 tons, followed by the Netherlands, with 3,800 tons. Other suppliers of note during the winter were Italy, with almost 2,000 tons, and Spain, with almost 1,500 tons. Although Kenya exported over 3,000 tons to the EC as a whole in 1990, the majority of this went to Germany and the Netherlands, with only 280 tons being directed to the UK. It is possible, however, that some Kenyan carnations were re-directed from the Netherlands into the UK.

It can also be noted from the statistics that until 1991, the Netherlands was the major supplier of carnations to the UK in both the summer and winter periods, whereas by 1990, Colombia had taken over as the major supplier in the winter period. On an annual basis, Colombia supplied 6,726 tons, compared with 7,202 tons supplied by the Netherlands, thereby making increasing inroads on the Netherlands as the major supplier of carnations to the UK market.

Kenya has flowers in the market for most of the year, with 280 tons during the winter period, from 1 November to 31 May and 278 tons during the summer period from June to October. This gives a different picture of Kenya's overall seasonality of supply, however, in that during the winter period, it supplied over 3,000 tons to the EEC as a whole, whereas in the winter period, it only supplied 1,680 tons to the 12 EEC members.

U.K. Carnation Import Share, 1990 based on Weight



Source: Eurostat

Consumer Preferences

Favorite colors are pink, white, red, yellow and salmon. Some novelties such as striped or frosted are becoming increasingly popular.

Varieties and Specifications

Perpetual flowering types of the species "Dianthus Carophyllus" are grown as cut flowers, either as single flower, dis-budded "Standards" or as non-disbudded "sprays".

A new development is the market for micro-carnations, of which "Gypsy" is a leading type.

New Mediterranean types such as the pink "Nora Barlo", "Sharinah", "Lena", "Castellaro", the red "Scania", "Tanga" and "White Roma", with novelties such as "Pallas" (yellow) and "Charmeur" (lilac) gaining popularity.

Popular cultivars of spray carnations include:

- pinks, e.g. "Silvery Pink", "Karina" and "Barbara".
- red, e.g. "Red Barron", "Elsy".
- white, e.g. "Royalette", "Bagatelle" and "Bianca".

yellow, e.g. "Adelfie".

With standards, the established "sim" types predominate, popular cultivars, being red, salmon, pink and white sim.

Pinks are the most popular, followed by red and white. A typical mixed box of 28 bunches would contain: 9 pink, 7 red, 6 white and 6 mixed colors and novelties.

For sprays, pinks predominate, with about 50%. The remainder is made up of 25% white, 20% red and 5% others.

The length and condition of the stem is as important as the flower. Leaves should be bold, bright and curled, with natural bloom. Shiny leaves indicate age and tiredness.

Standards should be bunched into 25 stems/bunch, with 24, 28 or 32 bunches per box according to grade.

Sprays should be bunched into five stems/bunch and placed in a polyethylene/plastic sleeve, hundred sleeves per box.

Bunches should be packed in a strong, telescopic corrugated board carton with lid. The Dutch 'A' size carton, 120 x 46 x 25cm will hold between 600 and 800 standard and 500 sprays.

Standards

EC standards apply. The three grades acceptable are determined by length, strength of stem and flower size.

- "Select" - long, 80cm stems. 600/standard 'A' box.
- "Fancy" - medium, 70cm stems. 700/box.
- "Standard" - 60cm stems. 800/box.

The market requires about 60% fancy, 30% select and 10% standard.

For sprays, 2 <u>classes</u> generally apply, with the exporter encouraged to send only Class 1. This must have a minimum of three ripe buds. The flowers should be sorted into grades of 3-5 and 5-7, sound, ripe and perfect buds per stem.

A phytosanitary certificate is required.

Import Duties

Carnations from ACP countries have duty-free access to the UK.

Market Opportunities

The United Kingdom market for carnations is well-supplied throughout the year by the Netherlands and increasingly by Colombia. Supplies from other EC countries such as Spain and Italy are also gaining ground. The EEC associate country, Turkey, which has duty-free access to EC markets, also has increased amounts entering the United Kingdom.

On the other hand, however, domestic production is declining and the product is not easily grown in gardens in the UK, unlike chrysanthemums and roses. This means that a year-round demand does exist for carnations, although it peaks for imports during the winter periods. Although there is not a great deal of domestic production in the summer, there is competition from an abundant supply of domestically produced competitive flowers such as roses and chrysanthemums.

Kenya's presence on the market is not as marked as it is for other European countries and it is not as well known a supplier of carnations in the UK as it is, for example, in Germany and the Netherlands. Colombia is very much the major "distant" supplier of carnations.

A very competitive market does exist, however, and it is one that should always be regarded as an alternative by Kenyan suppliers, should conditions change in other countries. With the increasing unification of Europe, however, it is likely that conditions which impinge on demand in other countries may well have a similar effect in the UK. At the moment, this is not quite the case.

STATICE

Note: Official statistics do not identify statice separately and it is therefore impossible to assess the size of the market from secondary information.

Imports

Imports under the statistical category "fresh cut flowers and buds, excluding roses, carnations, orchids, gladioli and chrysanthemums" amounted to 12,806 tons in 1990. Flowers falling into this category include antirrhinum, aster, dianthus barbatus, achillia, campanula, scabiosa, limonium, delphinium, and helichrysum.

The total of 12,806 tons in 1990 represents a significant increase in the market from the figures pertaining in the 1980s when, in 1981 imports were 1,734 tons and in 1985 when imports were 4,490 tons. Between 1985 and 1989 the volume of imports increased to 12,131 tons - an increase of 170%.

Market Share/Seasonality of Supply

The Netherlands accounted for 11,654 tons or 91% of imports in 1990. The only other suppliers of any note in 1990 were Israel, with 104 tons during the summer period. In the winter period, from 1 November through to 31 May, supplies came from Italy (135 tons), Israel (434 tons), Spain (72 tons) and Kenya (43 tons). During the summer period, Kenya supplied 17 tons in 1990. It is not known how much of the Kenyan supply was made up of Limonium.

Varieties and Specifications

The length and condition of the stem and the uniformity of the flower are important. Most are bunched into 5's or 10's. Occasionally, some are sleeved. Different varieties should not be mixed.

Flowers should be well-developed and slightly immature. A full flowering head is important, with an abundance of florets. Most are very tender and delicate and need to be speedily pre-cooled and shipped.

A minimum of handling is essential. Bunching into 5's or 10's and sleeving enhances presentation and protects the delicate flowers. The standard Dutch 'A' telescopic cardboard box measuring 120 x 46 x 25cm will hold about 400-600 blooms. The stems need to be held fast to prevent movement and bruising.

Standards

A phytosanitary certificate is required for imports of Limonium from non-EC countries. EC quality standards apply - *see Appendix A*.

Import Tariffs

ACP countries have duty-free access to the UK market.

Market Opportunities

The United Kingdom is a relatively underdeveloped market for summer flowers, demand traditionally being for roses, carnations, chrysanthemums and low priced spring bulbs. Demand therefore, for flowers such as ammi majus, solidaster, delphinium, limonium and other summer flowers is low, albeit growing. The Netherlands has been instrumental in organizing strong publicity and promotion campaigns in the UK to broaden the range of flowers in the consumption basket. Also, during the last few years, supermarkets have developed the sales of ready-made bouquets and bunches and most include some kind of filler flowers. There is, therefore, a distinct market for these flowers in the winter period, although competition from the Netherlands and Israel will, of course, be intense.

References

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"Floricultural Products," International Trade Centre, 1987.

Eurostat Statistics, 1988 - 1990.

Primary interviews in the Netherlands, Germany and the U.K., David Jones, 1989.

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International Trade Centre, "Floricultural Products Report," 1987.

Appendix A

EEC quality standards for fresh cut flowers (Annex I of EEC Regulation No. 316/68)

I. DEFINITION OF PRODUCE

These standards shall apply to fresh cut flowers and flower buds of a kind suitable for bouquets or for ornamental purposes, falling within subheading No. 06.03 A of the Common Customs Tariff.

II. QUALITY REQUIREMENTS

A. Minimum requirements

Produce must have been carefully cut or picked, according to the species, and have reached an appropriate stage of growth.

B. Classification

(i) Class I

Produce in this class must be of good quality. It must have the characteristics of the species, and where appropriate, of the variety (cultivar).

All parts of the cut flowers must be:

- Whole,
- Fresh,
- Free of animal or vegetable parasites and from damage caused by such,
- Free of residues of pesticides and other extraneous matter affecting the appearance,
- Unbruised,
- Free of defects of development; for carnations a split calyx is not considered a defect of development.

However, in respect of American carnations, flowers with a split calyx must be ringed, put up separately in uniform lots and the packages marked accordingly.

The stems must, according to species and variety (cultivar) be rigid and strong enough to support the flower(s).

(ii) Class II

This class shall include all produce which does not meet all the requirements of Class I.

All parts of the cut flowers must be:

- Whole,
- Fresh,
- Free of animal parasites.

The flowers may, however, have the following defects:

- Slight bruising,
- Slight damage caused, for example, by disease or by animal parasites,
- Weaker, less rigid stems,
- Small marks caused by treatment with pesticides.

The permitted defects must not impair the keeping quality, appearance or utility of the products.

C. Extra Class

Produce which qualifies for Class I without the aid of any quality tolerance may be marked EXTRA. However, this classification may not be used for American carnations with a split calyx.

III. SPECIAL PROVISIONS

The special provisions for certain types of flowers set out in Annex I /.[4] shall override the provisions of this Annex.

IV. SIZING

For cut flowers, sizing must comply at least with the following scale:

Code	Length
0	Less than 5 centimetres or flowers marketed without stems
5	10 centimetres
10	10 - 15 centimetres
15	15 - 20 centimetres
20	20 - 30 centimetres
30	30 - 40 centimetres
40	40 - 50 centimetres
50	50 - 60 centimetres
60	60 - 80 centimetres
80	80 - 100 centimetres
100	100 - 120 centimetres
120	More than 120 centimetres

These lengths include the flower head.

The difference per unit of presentation (bunch, bouquet, box and the like) between the maximum and minimum lengths of the flowers in the unit may not exceed:

- 2.5 centimetres for flowers in codes 15 and below,
- 5.0 centimetres for flowers in codes 20 (inclusive) to 50 (inclusive),
- 10.0 centimetres for flowers in codes 60 and above.

This difference may be doubled for flowers presented in fan shape. For chrysanthemums with large flowers presented in fan shape, this difference may go up to 20 centimetres for flowers in codes 20 to 50 (inclusive).

The size scale and the uniform lengths set out above are not applicable to mimosa.

The minimum length for branches of mimosa shall be fixed at 20 centimetres. However, bundles and bouquets composed exclusively of small sprigs of a length less than 20 centimetres may be permitted subject to the words 'short stem' or an equivalent term being marked on the packages.

V. QUALITY TOLERANCES

Quality tolerances shall be permitted in each unit of presentation as follows:

(I) Class I

Five per cent of the cut flowers may have slight defects, on condition that the uniformity of the flowers in a unit of presentation is not affected.

(II) Class II

Ten per cent of the cut flowers may vary from the requirements of the class. Half of this percentage may have been attacked by parasites of animal or vegetable origin.

The defects in question must not impair the utility of the products.

VI. PACKAGING AND PRESENTATION

A. Presentation (Regulation (EEC) No. 802/71)

A unit of presentation (bunch, bouquet, box and the like) must consist of 5, 10 or a multiple of 10 pieces.

However this rule does not apply to:

(a) Flowers normally sold singly,

(b) Flowers normally sold by weight,

(c) Flowers for which seller and buyer agree expressly to derogate from the provisions concerning the number of flowers in a unit of presentation. This derogation is admissible solely for transactions outside wholesale markets on condition that:

- The goods are the subject of a direct sale, based on a fixed selling price per unit of presentation, at wholesale level to a retailer or a person acting on behalf of a retailer,
- The goods are accompanied by a bill, delivery note or similar document showing the above-mentioned selling price,
- The unit of presentation is in the packaging required by the buyer for the ultimate purchaser. This packaging must be such as to permit identification of the goods.

B. Uniformity

Each unit of presentation (bunch, bouquet, box and the like) must contain flowers of the same genus, species or variety (cultivar) and of the same quality class, and must have reached the same stage of development.

Mixtures of flowers or mixtures of flowers with foliage of different genus, species or variety (cultivars) are, however, permitted so long as products of the same quality class are used and that they are appropriately marked.

C. Packaging

Packaging must protect the produce adequately. Paper or other materials in direct contact with the cut flowers must be new.

VII. MARKING

The following particulars must accompany the goods:

A. Identification

Dispatcher or)
)   Name and address or code mark
Packar)

B. Nature of produce

- Genus,
- Species or variety (cultivar) or colour of flowers,
- Where appropriate, the word 'mixture' (or equivalent term).

C. Origin of produce (optional)

Region of origin, or national, regi .nal or local name.

D. Commercial specifications

- Class
- Size (length code) or minimum and maximum lengths (optional)
- Number or net weight

E. Official control mark (optional)

F. Presentation (Regulation (EEC) No. 802/71)

If the number of flowers per unit of presentation does not correspond to the provisions of Section VI A, packages must be marked to show the exact composition of the units of presentation contained therein.

APPENDIX B

ISRAEL (AGREXCO) EXPORT QUALITY STANDARDS

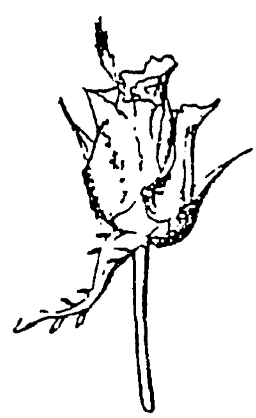
ROSES

Roses: Recommended bud opening stages

(Mercedes, Jaguar and Gabrielle)

(a) Mercedes and Jaquar

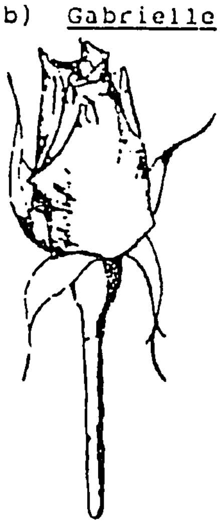
Maximum opening



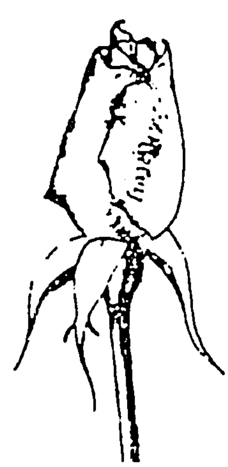
Minimum opening

Unripe (not permitted for export)

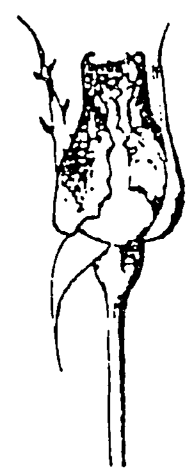
(b) Gabrielle



Maximum opening



Minimum opening



Unripe (not permitted for export)

- Rose - Quality specifications

:t.	Superb	Standard	Regular	Class 2
General quality Criteria				
:ts and disease	Flowers should be completely free of pest and disease damage and scorch	As superb class but some slight damage is acceptable but no pest or disease should be present e.g. light damage of controlled mildew acceptable providing not more than 3 leaves per stem	Some signs of light controlled disease permitted. Damage of chewing and sucking insects accepted.	As regular
.anical damage	Flowers should be completely free of mechanical damage	As Superb	Some light mechanical damage permitted	Intermediate mechanical damage permitted
and chemical [illegible]	Flowers and all parts should be reasonably clean of chemical residues, dust and soil which detract from the overall appearance	As superb	Flowers should be clean and free of dirt, mud or dust but some visible residues of chemicals permitted	As regular

Stem Criteria

Fect.	Superb	Standard	Regular	Class 2
rength and raightness	Stems should be straight and strong enough to carry the flower bud - i.e. when the base of the stem is held in an upright position the flower must remain upright. No stem bend defects are permitted	As superb	Some bending of the stem is permitted. Thin stems are acceptable providing the stem is strong enough to hold the flower bud in an upright position	Stems up to 30 degrees from upright are permitted but stem must still carry the weight of the flower bud
ncing/stairs	Stems should be completely uniform for the entire length without any stairs	As superb. Any stems with some branching must either be shortened or reduced to Class 2	As standard but 2 flowers per bunch are permitted if branching in lower 1/3 of stem	Up tp 4 flowers per bunch with branching providing in lower 1/3 of stem
inning stems	Stems must be completely free of large scars of side branches removed from leaf axils	Some signs of scars in axils of leaves permitted providing they do not detract from the appearance of the bunch	Scars at axils permitted	As regular with stumps up to 5 mm permitted

:ts	Superb	Standard	Regular	Class 2
Leaves				
anical ge	Leaves should be completely free of mechanical damage. Torn leaves or scorched leaves not permitted	As superb	Some mechanical damage and scorch permitted on 1/3 lower part of stem	Light mechanical damage and scorch permitted on whole stem
ormed es	Leaves should be of characteristic size of the variety. No malformation permitted	As superb	Malformed leaves permitted in lower 1/3 of stem	Malformed leaves all along the stem permitted
ur	Leaves should be green and characteristic of the variety. Chlorosis which detracts from appearance not permitted	As superb	Light colour permitted between veins	as regular plus medium chlorosis permitted
ing	No missing leaves on upper 2/3 of stem permitted	As superb	Missing leaves permitted up to every other leaf in the lower half of stem	Every other leaf missing along whole stem permitted

efect	Superb	Standard	Regular	Class 2
. <u>Flower bud</u>				
tage of pening	Flower bud should be at the correct stage according to variety. No deviation of stage of opening permitted	2 buds in a bunch may deviate by one stage permitted providing these flowers are not premature. (premature flowers cannot be exported)	Opening with one stage above the maximum permitted. Premature flower buds not accepted	Over opening by 2 stages above the maximum permitted in standard is acceptable
ize of lower bud	Flower buds should be in size proportional to the length of stem	2 flower buds per bunch can be smaller than in superb class	Up to 4 buds per bunch can be smaller	Variable bud sizes permitted
[illegible] olour	Flowers should be characteristic of the variety. No deviations (pale or blueing permitted)	Some light deviation permitted providing they do not detract from the overall appearance of the bunch. Any deviation must be uniform within the bunch	Deviation of colour permitted providing it is not caused by aging of the flowers	Deviation from the varieties colour permitted providing no blueing caused by aging.
alformation ompressed and [illegible] buds)	Flowers should not contain any malformation e.g. Bull head (flattened buds) or onion heads. 1 side malformation and sticking leaves not permitted	As superb	5 malformed flowers permitted providing malformation does not exceed 50% of flower diameter	As regular

.t	Superb	Standard	Regular	Class 2
ng	Peeling of petal not permitted	As superb	Up to 2 flowers/bunch may be peeled provid-ing no more than 2 petals/bloom are removed	4 peeled buds permitte per bunch providing only 1-2 petals/bloom removed
<u>inch</u> <u>ecuirements</u>				
l stem cut	In order to prevent short stems in the bunch the bottom cut may be 5 cm longer than the minimum length but minimum length of any stem in any bunch must meet the minimum specification	As superb	As superb	As superb
er bands	Tying with rubber bands should be sufficiently above the base of the stem so as to ensure that there is no movement of individual stems	As superb	As superb	As superb

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ect	Superb	Standard	Regular	Class 2
formity of l opening e figure 5)	Variability of opening permitted between minimum and optimum stage	As superb	Variability permitted between minimum and maximum stage	As regular
our formity	No colour variations permitted (not a problem in Garnet varieties)	Some light variability permitted providing it does not detract from the overall appearance of the bunch. No mixing of varieties permitted	As standard	Variability in colour permitted providing there is no mixing of varieties
apping of ch	Wrapping with cellophane should be tight and straight. The size of cellophane sheet should be appropriate to the stem length	As superb	As superb	As superb

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ct	Superb	Standard	Regular	Class 2
Overall Criteria	20 roses per bunch with no defects of stem, foliage and flower buds and must be totally free of pest and disease. Uniformity of opening stage in the bunch is important, but it is permitted to have within a bunch flowers with a range of one stage of opening i.e. between minimum and optimum stages or between optimum and maximum	Within any bunch a total of no more than 2 defects permitted	As standard	Within any bunch a total of no more than 3 defects permitted

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. Roses: Israel - stem length size designation by varietal type (cms)

ssification	Stem lengths cms	Classification	stem lengths cms	Classification	stem length cms	Notes
.ra	80	Super	60	Super	45	1. Stem length
	70	Extra	50	Extra	40	is measured
.I	60	I	40	I	35	from base of
:II	50	II	30	II	30	stem to tip
'V	40	III	25	III	25	of bud
'	30	IV	20	IV	20	

Table 8.1.2 Rose Exports: Israel - Recommended varietal selection by quality class

SUPERB	STANDARD	REGULAR	CLASS 2
Only following varieties permitted in superb class			
Boccara	1. Any Hybrid T variety		
Sonia	Stem lengths extra		
Bellinda	to V.		
Mercedes			
Gabriella	2. Any Sweetheart varieties		
Jaguar	Stem lengths extra to	As standard	As standard
Golden Times	IV		
Jacaranda			
Candia	3. Any Garnets.		
Champagne	Stem lengths extra to		
[illegible]	IV		
Marqueta			
[illegible]			
[illegible] Fluke			

APPENDIX C

EUROPEAN COMMUNITY IMPORT STATISTICS

Table R1: 1988 EC Imports of Fresh Cut Roses and Buds, Entering from 6/1-10/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.
Netherlands	889	503	13,883	1	2	1,046	38	15	0	0	831
Canary Is.			130		173		1	1	22	0	2
Israel	2	4	83			6		10	35		68
Other	1	4	164	0	227	70	3	23	50	0	18
Total	892	511	14,260	1	402	1,122	42	49	107	0	919
Intra-EC	890	505	13,920	1	2	1,080	41	17	23	0	838
Extra-EC	2	6	340	0	400	42	1	32	84	0	81

Source: EUROSTAT

Table R2: 1988 EC Imports of Fresh Cut Roses and Buds, Entering from 6/1-10/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	2,279	2,655	50,484	7	18	4,481	195	108	0	0	4,992	65,219
Canary Is.			494		601	1	4	10	78	0	9	1,197
Israel	10	30	254			44		51	288		480	1,157
Other	3	18	648	1	12	298	28	114	206	0	82	1,410
Total	2,292	2,703	51,880	8	631	4,824	227	283	572	0	5,563	68,983
Intra-EC	2,282	2,665	50,666	8	19	4,604	220	138	108	0	5,031	65,741
Extra-EC	10	38	1,214	0	612	220	7	145	464	0	532	3,242

Source: EUROSTAT

Table R3: 1988 EC Imports of Fresh Cut Roses and Buds, Entering from 11/1-5/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	1,095	395	15,936	0	4	1,408	39	5			623	19,505
Italy		2	504			13			1		1	521
Canary Is.			620		279	26	4	17	153		17	1,116
Morocco	1	4	24			569		3	33		1	635
Colombia			251		3	33	3	100	77		77	544
Ecuador			130			7		43	146		3	329
Israel	11	97	1,072			92		10	1,060		529	2,871
Other	5	3	424	0	0	85	13	16	269	0	30	845
Total	1,112	501	18,961	0	286	2,233	59	194	1,739	0	1,281	26,366
Intra-EC	1,099	400	16,506	0	4	1,456	52	14	91	0	639	20,261
Extra-EC	13	101	2,455	0	282	777	7	180	1,648	0	642	6,105

Source: EUROSTAT

Table R4: 1988 EC Imports of Fresh Cut Roses and Buds, Entering from 11/1-5/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	3,721	3,193	78,965		24	6,160	365	66			6,464	98,958
Italy		8	3,138			95			3		14	3,258
Canary Is.			3,647		1,461	199	34	180	921		163	6,605
Morocco	6	21	172		1	4,258		49	140		9	4,656
Colombia			1,481		13	162	15	541	319		610	3,141
Ecuador			698			34		197	662		9	1,600
Israel	75	348	6,646		1	387	1	109	5,546	1	5,611	18,725
Other	23	66	1,846	1	1	507	89	226	1,308	0	221	4,288
Total	3,825	3,636	96,593	1	1,501	1,802	504	1,368	8,899	1	13,101	141,231
Intra-EC	3,741	3,252	82,420		25	6,460	454	245	594	0	6,609	103,801
Extra-EC	84	384	14,173	1	1,476	5,342	50	1,123	8,305	1	6,492	37,430

Source: EUROSTAT

Table R5: 1989 EC Imports of Fresh Cut Roses and Buds, Entering from 6/1-10/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	859	607	14,866		18	968	46	3			730	18,097
Canary Is.		2	90		82	1	2		16		3	196
Israel	2	4	75			5			98		54	238
Other	4	36	185	1	3	57	3	14	82	0	37	422
Total	865	649	15,216	1	103	1,031	51	17	196		824	18,953
Intra-EC	863	610	14,917		18	1,009	49	5	21		740	18,232
Extra-EC	2	39	299	1	85	22	2	12	175	0	84	721

Source: EUROSTAT

Table R6: 1989 EC Imports of Fresh Cut Roses and Buds, Entering from 6/1-10/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	2,304	2,950	53,012		75	3,624	252	16		1	4,719	66,953
Canary Is.		8	461		390	4	12	5	79		16	975
Israel	4	24	202			14		1	296		362	903
Other	33	42	685	0	20	204	22	81	293	0	144	1,524
Total	2,341	3,024	54,360		485	3,846	286	103	668	1	5,241	70,355
Intra-EC	2,336	2,967	53,224		75	3,751	270	39	93	1	4,756	67,512
Extra-EC	5	57	1,136	0	410	95	16	64	575	0	485	2,843

Source: EUROSTAT

Table R7: 1989 EC Imports of Fresh Cut Roses and Buds, Entering from 11/1-5/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	1,191	379	17,044		18	1,355	47	2			774	20,810
Germany	5	3				3			46		7	64
Italy	1	1	576			12			4		3	597
Canary Is.			526		330	22	9	8	83		18	996
Morocco	4	2	57			656		8	54		18	799
Kenya		3	211						95		3	312
Zimbabwe			1						233		10	244
Colombia			196		10	22	6	46	18		92	390
Ecuador			110			10		14	84		1	219
Brazil			112			4			7			123
Israel	17	42	1,080			96		12	1,488		506	3,241
Other	7	16	164	2	5	45	16	19	57	1	35	367
Total	1,225	446	20,077	2	363	2,225	78	109	2,169	1	1,467	28,162
Intra-EC	1,204	385	17,658		20	1,391	63	9	78	1	799	21,608
Extra-EC	21	61	2,419	2	343	834	15	100	2,091	0	668	6,554

Source: EUROSTAT

Table R8: 1989 EC Imports of Fresh Cut Roses and Buds, Entering from 11/1-5/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	4,474	3,101	84,302		124	6,285	373	25		6	7,695	106,385
Germany	38	55				11		4	324		80	512
Italy	8	6	2,943		1	88			19		16	3,081
Canary Is.			3,727		1,736	173	64	84	578		248	6,610
Morocco	39	13	353		2	4,903		106	250		89	5,755
Kenya		11	517						311		13	852
Zimbabwe			5						695		45	745
Colombia			1,163		54	107	37	271	104		710	2,446
Ecuador			670			65		57	436		3	1,231
Brazil	1		907			24		6	44			982
Israel	89	393				410		98	6,409	1	4,895	12,295
Other	19	37	7,609	4	37	319	94	199	296	1	221	8,836
Total	4,668	3,616	102,196	4	1,954	12,385	568	850	9,466	8	14,015	149,730
Intra-EC	4,538	3,178	87,469	1	132	6,534	465	167	465	7	7,912	110,868
Extra-EC	130	438	14,727	3	1,822	5,851	103	683	9,001	1	6,103	38,862

Table R9: 1990 EC Imports of Fresh Cut Roses and Buds, Entering from 6/1-10/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	1,036	663	16,715		23	696	38	11			720	19,902
Canary Is.		7	83		77		1		12		1	181
Israel		1	94			4			116		53	268
Other	8	21	237	0	19	44	3	6	180	0	54	572
Total	1,044	692	17,129		119	744	42	17	308		828	20,923
Intra-EC	1,042	672	16,793		24	715	40	11	56		730	20,083
Extra-EC	2	20	336	0	95	29	2	6	252	0	98	840

Source: EUROSTAT

Table R10: 1990 EC Imports of Fresh Cut Roses and Buds, Entering from 6/1-10/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	2,518	3,047	59,274	2	139	2,653	255	79		1	4,546	72,514
Canary Is.		42	435		381	1	7		45		7	918
Israel	2	3	273			17			208		475	978
Other	39	48	839	0	95	190	30	34	597	0	224	2,096
Total	2,559	3,140	60,821	2	615	2,861	292	113	850	1	5,252	76,506
Intra-EC	2,552	3,082	59,549	2	140	2,722	280	79	197	1	4,609	73,213
Extra-EC	7	58	1,272	0	475	139	12	34	653	0	643	3,293

Source: EUROSTAT

Table R11: 1990 EC Imports of Fresh Cut Roses and Buds, Entering from 11/1-5/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	1,139	481	19,774		33	1,004	59	5		1	889	23,385
Italy	1		526			88					1	616
Canary Is.		10	607		274	16	8	5	102		27	1,049
Morocco	7	3	91		3	763		17	155		1	1,040
Kenya			322						165		49	536
Zimbabwe			9						588		30	627
Colombia	1		218		44	37		29	5		92	432
Ecuador			105		2	1		13	148		1	270
Brazil			168						11			179
Israel	7	20	901			78		5	1,761		350	3,12[illegible]
Other	7	23	199	0	2	39	13	9	172	1	71	536
Total	1,162	537	22,920		358	[illegible],026	86	83	3,107	2	1,511	31,792
Intra-EC	1,147	486	20,337		33	1,120	71	11	101	1	917	24,224
Extra-EC	15	51	2,583	0	325	906	15	72	3,006	1	594	7,568

Source: EUROSTAT

Table R12: 1990 EC Imports of Fresh Cut Roses and Buds, Entering from 11/1-5/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	4,510	3,426	95,189		244	4,635	488	54		[illegible]	8,083	116,632
Italy	3		2,414			80			3		11	2,511
Canary Is.		72	4,331		1,557	121	60	59	585		195	6,980
Morocco	58	18	518		20	6,221		239	770		6	7,850
Kenya		1	955						510		162	1,628
Zimbabwe			57						2138		112	2,307
Colombia	5	2	1,288		267	190	38	177	31		693	2,691
Ecuador			642		4	4		50	664		3	1,367
Brazil			1229			4		3	115			1,351
Israel	74	144	5,798	1		359	1	48	7,939	4	4,640	19,008
Other	63	68	798	0	18	249	144	99	728	6	344	2,517
Total	4,713	3,731	113,219	1	2,110	11,863	731	729	13,483	13	14,249	164,842
Intra-EC	4,573	3,466	97,753		247	4,888	615	130	489	10	8,257	120,428
Extra-EC	140	265	15,466	1	1,863	6,975	116	599	12,994	3	5,992	44,414

Source: EUROSTAT

Table C1: 1988 EC Imports of Fresh Cut Carnations and Buds, Entering from 6/1-10/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	748	139	5,742		11	448	86				3,336	10,506
Italy	2		208		2	1			14		412	639
Spain	1		617			50		70	678		517	1,933
Kenya			715			34			65		152	966
Colombia		5	683		142	75	66		44		1,871	2,886
Other	2	5	97	0	15	20	48	1	311	0	129	628
Total	753	145	8,062		170	628	200	71	1,112		6,417	17,558
Intra-EC	751	140	6,579		20	515	133	70	981		4,287	13,476
Extra-EC	2	5	1,483	0	150	113	67	1	131	0	2,130	4,082

Source: EUROSTAT

Table C2: 1988 EC Imports of Fresh Cut Carnations and Buds, Entering from 6/1-10/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	1,535	852	23,343		19	1,999	446				16,504	44,698
Italy	11		1,294		19	4			96		1,586	3,010
Spain	2		1,136			98		155	892		626	2,909
Kenya			2,555			118			179		456	3,308
Colombia		11	3,028		909	333	327	2	196		6,875	11,681
Other	7	18	284	0	57	86	243	0	881	0	454	2,030
Total	1,555	881	31,640		1,004	2,638	1,016	157	2,244		26,501	67,636
Intra-EC	1,549	870	25,818		48	2,167	686	155	1,827		18,792	51,912
Extra-EC	6	11	5,822	0	956	471	330	2	417	0	7,709	15,724

Source: EUROSTAT

Table C3: 1988 EC Imports of Fresh Cut Carnations and Buds, Entering from 11/1-5/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	3		214		3			4	60		5	289
Netherlands	1,175	326	9,195		1	555	147				3,737	15,136
Germany	1	19				75			1,512		265	1,872
Italy	10		2,651			19			16		251	2,947
Spain	50	8	3,689			737	2	132	7,948	1	2,656	15,223
Turkey			104						122		484	710
Kenya			2,307			108		2	614		329	3,360
Colombia		4	1,134	3	54	98	75	1	404		2,714	4,487
Israel	108	14	1,717			75			4,282		1,501	7,697
Other	3	2	140	0	2	58	74	0	138	0	245	662
Total	1,350	373	21,151	3	60	1,725	298	139	15,096	1	12,187	52,383
Intra-EC	1,239	355	15,792		4	1,399	221	136	9,569	1	7,083	35,799
Extra-EC	111	18	5,359	3	56	326	77	3	5,527	0	5,104	16,584

Source: EUROSTAT

Table C4: 1988 EC Imports of Fresh Cut Carnations and Buds, Entering from 11/1-5/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	13		1,265		3			13	248		3	1,545
Netherlands	2,832	1,723	39,669		1	2,2[illegible]	708	4			17,928	65,134
Germany	4	73				288	1		5,510		212	6,088
Italy	73	4	18,213			76			102		1,520	19,988
Spain	188	15	10,689			1,972	12	397	18,995	2	7,822	40,092
Turkey			336						357		1,687	2,380
Kenya			7,126			402		7	1,434		993	9,962
Colombia	1	14	5,260	11	394	406	373	3	1,579		11,789	19,830
Israel	374	77	5,178			160	1		11,231		6,685	23,706
Other	8	6	552	1	15	176	487	4	446	0	832	2,527
Total	3,493	1,912	88,288	12	413	5,749	1,582	428	39,902	2	49,471	191,252
Intra-EC	3,111	1,820	70,007		4	4,634	1,195	414	25,010	2	28,018	134,215
Extra-EC	382	92	18,281	12	409	1,115	387	14	14,892	0	21,453	57,037

Source: EUROSTAT

Table C5: 1989 EC Imports of Fresh Cut Carnations and Buds, Entering from 6/1-10/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	869	197	6,070		9	402	104				4,040	11,691
Germany	1	5				42		12	211		79	350
Italy	2		252			1			4		401	660
Spain	3		420			61		85	234		586	1,389
Turkey			23			1			23		131	178
Kenya			946			19			267		310	1,542
Colombia			622		184	79	79		34		2,162	3,160
Other	1	0	107	5	24	18	22	0	41	0	89	307
Total	876	202	8,440	5	217	623	205	97	814		7,798	19,277
Intra-EC	876	202	6,751		24	513	125	97	462		5,125	14,175
Extra-EC	0	0	1,689	5	193	110	80	0	352	0	2,673	5,102

Source: EUROSTAT

Table C6: 1989 EC Imports of Fresh Cut Carnations and Buds, Entering from 6/1-10/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	1,637	949	22,069		17	1,571	515				17,450	44,208
Germany	11	14				132		27	707		263	1,154
Italy	12		1,264			7			21		1,655	2,959
Spain	15		830			161		205	467		1,331	3,009
Turkey			54			4			78		532	668
Kenya			2,964			65			599		854	4,482
Colombia		2	2,630		1,014	346	372		147		8,274	12,785
Other	1	2	347	6	57	72	126	0	114	0	346	1,071
Total	1,676	967	30,158	6	1,088	2,358	1,013	232	2,133		30,705	70,336
Intra-EC	1,675	965	24,205		33	1,896	639	232	1,228		20,734	51,607
Extra-EC	1	2	5,953	6	1,055	462	374	0	905	0	9,971	18,729

Source: EUROSTAT

Table C7: 1989 EC Imports of Fresh Cut Carnations and Buds, Entering from 11/1-5/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	3		231	2	1				39		7	283
Netherlands	1,242	345	7,984			477	167				4,516	14,731
Germany	2	23		1		119		5	1,276		67	1,493
Italy	19	1	3,164			18			24		352	3,578
U.K.		1	2				103		1			107
Spain	162	45	3,672	6		802	[illegible]	74	10,698	7	3,230	18,699
Turkey			209			18			294		1,495	2,016
Kenya			1,938	3		96			842		383	3,262
Colombia		2	1,077	10	68	98	117		253		3,219	4,844
Israel	45	2	1,372			32			3,763		1,053	6,267
Other	0	4	117	8	22	116	8	0	138	0	282	695
Total	1,473	423	19,766	30	91	1,776	398	79	17,328	7	14,604	55,975
Intra-EC	1,428	416	15,070	9	6	1,432	273	78	12,079	7	8,323	39,121
Extra-EC	45	7	4,696	21	85	344	125	1	5,249	0	6,281	16,854

Source: EUROSTAT

Table C8: 1989 EC Imports of Fresh Cut Carnations and Buds, Entering from 11/1-5/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	10		1,431	14	2				158		43	1,658
Netherlands	2,859	1,703	32,211		1	2,153	71				21,173	60,816
Germany	9	66		3		402		9	3,954		290	4,733
Italy	108	3	21,200			91			192		2,054	23,648
U.K.		3	5			1	582		8			599
Spain	486	116	10,578	27		1,761	15	191	23,523	10	9,254	45,961
Turkey			510			63			885		4,433	5,891
Kenya			6,627	14		356		2	2,054		1,069	10,122
Colombia		10	4,894	65	451	434	578		1,115		14,043	21,590
Israel	173	7	3,960	3		53			9,000		3,856	17,052
Other	3	15	461	12	41	374	31	5	361	1	939	2,243
Total	3,648	1,923	81,877	138	495	5,688	1,922	207	41,250	11	57,154	194,313
Intra-EC	3,473	1,894	65,489	44	12	4,458	1,313	200	27,925	11	33,233	138,052
Extra-EC	175	29	16,388	94	483	1,230	609	7	13,325	0	23,921	56,261

Table C9: 1990 EC Imports of Fresh Cut Carnations and Buds, Entering from 6/1-10/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	910	163	6,604		10	139	65				3,412	11,303
Germany	2	2			5	49			282		202	542
Italy	3		287						1		283	574
Spain			130			50	4		433	2	194	813
Kenya			1,106			20			276		278	1,680
Colombia		2	618		354	113	123		174		2,634	4,018
Other	5	0	159	175	11	11	29	0	121	0	106	617
Total	920	167	8,904	175	380	382	221		1,287	2	7,109	19,547
Intra-EC	915	165	7,037		20	242	96		736	2	4,102	13,315
Extra-EC	5	2	1,867	175	360	140	125	0	551	0	3,007	6,232

Source: EUROSTAT

Table C10: 1990 EC Imports of Fresh Cut Carnations and Buds, Entering from 6/1-10/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	1,777	748	22,892		74	647	331	2			15,922	42,393
Germany	12	6			32	187			991		560	1,788
Italy	15		1,507			2			3		1,194	2,721
Spain			292			78	18		833	10	443	1,674
Kenya			3,545			85			699		751	5,080
Colombia		3	2,518		1,554	401	496		639		8,551	14,162
Other	16	5	403	45	35	39	159	0	285	0	399	1,386
Total	1,820	762	31,157	45	1,695	1,439	1,004	2	3,450	10	27,820	69,204
Intra-EC	1,804	757	24,769		114	926	501	2	1,905	10	18,159	48,947
Extra-EC	16	5	6,388	45	1,581	513	503	0	1,545	0	9,661	20,257

Source: EUROSTAT

Table C11: 1990 EC Imports of Fresh Cut Carnations and Buds, Entering from 11/1-5/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	7		197		1				39			244
Netherlands	1,142	281	8,723		5	952	183				3,790	15,076
Germany	3	2			1	118	1		875		76	1,076
Italy	22		2,773			6			146		427	3,374
Spain	116		1,999	5		705	24	8	7,637	10	1,935	12,439
Turkey			261			55			538		1,432	2,286
Morocco			19		6	65			8		62	160
Kenya	3		1,635			50			1,090		280	3,058
Colombia		13	1,464	6	139	141	199	5	541		4,092	6,600
Israel	32	4	1,520	1		33	1		4,401		784	6,776
Other	1	7	121	6	4	1	68	0	85	0	167	460
Total	1,326	307	18,712	18	156	2,126	476	13	15,360	10	13,045	51,549
Intra-EC	1,289	284	13,708	5	8	1,782	269	8	8,726	10	6,334	32,423
Extra-EC	37	23	5,004	13	148	344	207	5	6,634	0	6,711	19,126

Source: EUROSTAT

Table C12: 1990 EC Imports of Fresh Cut Carnations and Buds, Entering from 11/1-5/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	23		1,114	2	7				77			1,223
Netherlands	2,748	1,369	35,082		24	893	834				19,465	60,415
Germany	17	11			8	469	5		3,236		303	4,049
Italy	139		18,996			25			580		2,149	21,889
Spain	400		5,358	19		1,428	90	31	18,645	15	5,475	31,461
Turkey			734			212			1,440		5,260	7,646
Morocco			59		14	234		1	24		230	562
Kenya	10		5,470			221			2,663		925	9,289
Colombia	2	48	5,968	30	565	551	920	16	2,032		16,763	26,895
Israel	138	22	4,914	3		69	1		11,505		3,401	20,053
Other	6	20	550	34	21	7	462	3	315	1	634	2,053
Total	3,483	1,470	78,245	88	639	4,109	2,312	51	40,517	16	54,605	185,535
Intra-EC	3,326	1,386	60,604	21	41	2,814	1,356	31	22,632	16	27,766	119,993
Extra-EC	157	84	17,641	67	598	1,295	956	20	17,885	0	26,839	65,542

Table 01: 1988 EC Imports of Fresh Cut Flowers (EX. Roses/Carnations/Orchids/Gladioli/Chrysanthemums), Enter 6/1-

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	[illegible]
Netherlands	3,885	383	27,241	61	294	10,335	184	3,509		2	3,166	
Italy	17	3	144			147			11		12	
Kenya			113			1		4	784		5	
South Africa	2		261	1	2	5		25	88		2	
Israel	8	1	224	1	2	20		22	226		88	
Other	21	6	244	3	114	242	17	64	733	0	16	
Total	3,933	393	28,227	66	412	10,750	201	3,624	1,842	2	3,289	[illegible]
Intra-EC	3,917	392	27,473	62	297	10,655	201	3,517	289	2	3,185	[illegible]
Extra-EC	16	1	754	4	115	95	0	107	1,553	0	104	[illegible]

Source: EUROSTAT

Table 02: 1988 EC Imports of Fresh Cut Flowers (EX. Roses/Carnations/Orchids/Gladioli/Chrysanthemums),6/1-10/31, 1,0[illegible] CUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
Netherlands	8,608	2,412	97,522	368	1,541	51,336	954	24,746		15	16,415	203,917
Italy	108	26	749			924			48		62	1,917
Kenya			315		1	5		19	1,539		12	1,891
South Africa	10		997	6	12	28		157	279		11	1,500
Israel	30	2	411	2	8	73		192	532		555	1,805
Other	91	33	1,040	27	360	878	117	839	1,845	5	118	5,353
Total	8,847	2,473	101,034	403	1,922	53,244	1,071	25,953	4,243	20	17,173	216,383
Intra-EC	8,785	2,471	98,530	371	1,549	52,777	1,069	24,800	685	15	16,542	207,594
Extra-EC	62	2	2,504	32	373	467	2	1,153	3,558	5	631	8,789

Source: EUROSTAT

Table 03: 1988 EC Imports of Fresh Cut Flowers (EX. Roses/Carnations/Orchids/Gladioli/Chrysanthemums), Enter 11/1-5/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	90	20	391		1			59	370		17	948
Belgium/Lux		4	8		2	206			100		31	351
Netherlands	7,673	1,642	52,013	78	239	15,824	224	2,533	0	0	4,421	84,647
Germany	15	11		1		30		16	206		5	284
Italy	71	41	2,484		1	414			204		139	3,354
U.K.		234	60	1			35		991			1,321
Spain	2		167	2		80		454	237		36	978
Ethiopia									821			821
Kenya			367			8		9	3,422		30	3,836
Mauritius			6	1	4	12		43				66
Zimbabwe			5						1,089		1	1,095
South Africa	3		502	13	9	71		91	300		15	1,004
Peru			143			63			5			211
Israel	54	8	2,135	10	17	321		81	4,487		584	7,697
Other	15	4	438	9	139	285	2	58	672	0	76	1,698
Total	7,923	1,964	58,719	115	412	17,314	261	3,344	12,904		5,355	108,311
Intra-EC	7,855	1,952	55,150	82	243	16,557	260	3,063	2,166		4,653	91,981
Extra-EC	68	12	3,569	33	169	757	1	281	10,738	0	702	16,330

Source: EUROSTAT

Table 04: 1988 EC Imports of Fresh Cut Flowers (EX. Roses/Carnations/Orchids/Gladioli/Chrysanthemums), 11/1-5/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	658	123	2,730	1	5			509	2,379		86	6,491
Belgium/Lux		24	56		18	637			291		95	1,121
Netherlands	17,785	10,552	212,271	582	1,684	93,585	1,202	21,412		3	24,019	383,095
Germany	69	66		3	1	115		101	832		45	1,232
Italy	497	436	15,352		3	3,131	3		1,169		522	21,113
U.K.		851	256	5			217		3,705			5,034
Spain	13	1	372	16		196		1,042	496		199	2,335
Ethiopia									2,262			2,262
Kenya			1,298		1	46		53	7,044		90	8,532
Mauritius	1		60	14	58	156		840				1,129
Zimbabwe			13			4			3,613		5	3,635
South Africa	11		2,050	53	41	292		432	882		59	3,820
Peru	1		1,048			543			26		2	1,620
Israel	267	58	8,753	58	86	1,065		683	19,423		4,011	34,404
Other	51	18	2,311	60	437	921	6	540	2,050	0	309	6,703
Total	19,353	12,129	246,570	792	2,334	100,691	1,428	25,612	44,172	3	29,442	482,526
Intra-EC	19,029	12,055	231,217	606	1,712	97,685	1,421	23,079	8,976	3	24,985	420,768
Extra-EC	324	74	15,353	186	622	3,006	7	2,533	35,196	0	4,457	61,758

Source: EUROSTAT

Table 05: 1989 EC Imports of Fresh Cut Flowers (EX. Roses/Carnations/Orchids/Gladioli/Chrysanthemums), Enter 6/1-10/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	10		31					9	78		14	142
Belgium/Lux			24			230			45		2	301
Netherlands	4,451	475	30,506	141	516	13,001	187	3,931		3	4,603	57,814
Germany	13	18			1	31		6	72		13	154
Italy	15	3	248			212			13		29	520
Kenya			153	1					812		12	978
Mauritius			2		3	3		23				31
Zimbabwe			1	9		2			181			193
South Africa	2		252	3	4	7		26	101		6	401
Israel	1		145	1		7		8	244	1	61	468
Other	1	4	297	4	108	81	19	55	281	0	64	914
Total	4,493	500	31,659	159	632	13,574	206	4,058	1,827	4	4,804	61,916
Intra-EC	4,489	496	30,903	142	517	13,478	202	3,963	300	3	4,688	59,181
Extra-EC	4	4	756	17	115	96	4	95	1,527	1	116	2,735

Source: EUROSTAT

Table 06: 1989 EC Imports of Fresh Cut Flowers (EX. Roses/Carnations/Orchids/Gladioli/Chrysanthemums), 6/1-10/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	61	1	101					113	199		123	598
Belgium/Lux			65		2	648			102		3	820
Netherlands	10,452	2,438	100,480	793	2,791	58,340	914	23,116		31	21,597	220,952
Germany	72	61			3	69		14	268		79	566
Italy	88	21	1,234			1,197			82		193	2,815
Kenya			380	3					1,416		33	1,832
Mauritius			14		46	44		482				586
Zimbabwe			5	45		14			514		3	581
South Africa	10		1,056	11	23	30		147	330	1	37	1,645
Israel	2		401	6		19		80	880	4	339	1,731
Other	10	7	956	28	335	502	109	409	698	0	198	3,252
Total	10,695	2,528	104,692	886	3,200	60,863	1,023	24,361	4,489	36	22,605	235,378
Intra-EC	10,673	2,521	102,052	797	2,798	60,262	1,004	23,290	808	31	22,050	226,286
Extra-EC	22	7	2,640	89	402	601	19	1,071	3,681	5	555	9,092

Source: EUROSTAT

Table 07: 1989 EC Imports of Fresh Cut Flowers (EX. Roses/Carnations/Orchids/Gladioli/Chrysanthemums), Enter 11/1-5/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	100	13	449					99	344		5	1,010
Belgium/Lux		4	3		1	217			78		8	311
Netherlands	7,943	1,311	56,140	199	399	18,345	244	3,402		1	6,264	94,248
Germany	15	50				25		10	263		35	398
Italy	97	50	3,414			632			253		136	4,582
U.K.		334	32			1	72	1	988			1,428
Spain	6		143	8		116		329	328	1	167	1,098
Canary Is.			15	1	130		1					147
Cote Ivoire	7		92	1		42		10	31			183
Ethiopia									906			906
Kenya			607			2		4	4,165		44	4,822
Mauritius			4	2	6	12		48				72
Zimbabwe			26	5		4			1,340		2	1,377
South Africa	5		442	13	17	58		85	208		16	844
Swaziland			1						194			195
Martinique			1			67		2				70
Colombia	1		63		2	7	6	4	13		81	177
Peru			141			76			6			223
Israel	42	6	1,838	10	1	360		82	4,966	2	531	7,838
Australia			39			1			46		2	88
Other	3	11	269	4	3	96	1	33	346	(1)	36	801
Total	8,219	1,779	63,719	243	559	20,061	324	4,109	14,475	3	7,327	120,818
Intra-EC	8,160	1,763	60,203	207	402	19,341	317	3,845	2,319	1	6,620	103,178
Extra-EC	59	16	3,516	36	157	720	7	264	12,156	2	707	17,640

Source: EUROSTAT

Table 08: 1989 EC Imports of Fresh Cut Flowers (EX. Roses/Carnations/Orchids/Gladioli/Chrysanthemums),11/1-5/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	749	72	3,034	3	1			846	2,327		28	7,060
Belgium/Lux		26	11	4	3	949	1	5	220		33	1,252
Netherlands	20,779	8,779	230,444	1,405	2,772	102,030	1,412	26,713		7	32,862	427,203
Germany	95	191				88		38	1,136		177	1,725
Italy	647	452	20,506		3	4,182	1		1,878		982	28,651
U.K.		2,258	137			5	523	4	2,851			5,778
Spain	53	1	448	31		276	3	1,000	800	1	743	3,356
Canary Is.			78	3	407	3	5	3	1			500
Cote Ivoire	26		236	6	1	146		61	61			537
Ethiopia									2,584			2,584
Kenya				1,641	3		7	23	8,331		108	10,113
Mauritius	5		41	24	87	163		883			1	1,204
Zimbabwe			75	25		30			4,035		12	4,177
South Africa	22		1,935	55	86	223		394	672		76	3,463
Swaziland		1	7			1			572			581
Martinique			9			500		19				528
Colombia	3		351		8	29	32	29	55		334	841
Peru			909			657			39			1,605
Israel	261	53	7,866	79	4	886		702	20,866	8	3,906	34,631
Australia			282			8		2	264		10	566
Other	23	19	2,741	(1,603)	8	1,401	(5)	327	972	1	158	4,042
Total	22,663	11,852	269,110	1,673	3,383	111,577	1,979	31,049	47,664	17	39,430	540,397
Intra-EC	22,324	11,780	254,716	1,445	2,783	108,542	1,940	28,651	9,374	8	34,843	476,406
Extra-EC	339	72	14,394	228	600	3,035	39	2,398	38,290	9	4,587	63,991

Source: EUROSTAT

Table 09: 1990 EC Imports of Fresh Cut Flowers (EX. Roses/Carnations/Orchids/Gladioli/Chrysanthemums), Enter 6/1-10/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	25	2	45		2			21	50		2	147
Belgium*Lux		4	4	1	3	183			35		1	231
Netherlands	4,645	683	32,496	369	588	16,714	209	5,179		7	4,958	65,848
Italy	18	5	206			221			18		52	520
Kenya	4		192			3		1	1,288		17	1,505
Mauritius			4	1	3	3		32				43
Zimbabwe						2			277		3	282
South Africa	7		263		1	8		20	181			480
Israel	8		176	1	4	17		13	558	1	104	882
Other	19	28	308	1	112	106	23	27	405	0	92	1,121
Total	4,726	722	33,694	373	713	17,257	232	5,293	2,812	8	5,229	71,059
Intra-EC	4,704	711	32,806	370	593	17,137	224	5,210	226	7	5,071	67,059
Extra-EC	22	11	888	3	120	120	8	83	2,586	1	158	4,000

Source: EUROSTAT

Table 010: 1990 EC Imports of Fresh Cut Flowers (EX. Roses/Carnations/Orchids/Gladioli/Chrysanthemum),6/1-10/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	128	4	125		16			177	239		8	697
Belgium*Lux		16	24	3	36	610	4		49	1	6	749
Netherlands	11,165	2,693	114,666	1,763	3,093	76,805	1,103	27,145		74	23,166	261,673
Italy	94	40	1,071			1,224			134		312	2,875
Kenya	17		594	1		15		6	2,501		48	3,182
Mauritius			29	4	51	39		563				686
Zimbabwe						15			614		10	639
South Africa	23		1,195		9	39		128	488			1,882
Israel	18		482	8	24	59		107	1,593	2	817	3,110
Other	91	68	985	10	365	560	126	219	1,108	1	303	3,836
Total	11,536	2,821	119,171	1,789	3,594	79,366	1,233	28,345	6,726	78	24,670	279,329
Intra-EC	11,468	2,804	116,009	1,769	3,150	78,724	1,196	27,353	808	75	23,648	267,004
Extra-EC	68	17	3,162	20	444	642	37	992	5,918	3	1,022	12,325

Source: EUROSTAT

Table 011: 1990 EC Imports of Fresh Cut Flowers (EX. Roses/Carnations/Orchids/Gladioli/Chrysanthemums),Enter 11/1-5/31, MTs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	154	13	536					104	333		10	1,150
Belgium/Lux		11	14		1	227			44			297
Netherlands	6,992	1,379	61,206	281	1,036	21,313	302	4,043		11	6,696	103,259
Germany	21	46				25		6	268		5	371
Italy	94	64	3,284	6	2	591			352		135	4,528
U.K.		448	54		2	5	48		944			1,501
Spain		68	254	1		62	2	149	257	4	72	869
Canary Is.			26	1	131		1	2	33			194
Cote Ivoire	5		119	1		50		6	75			256
Ethiopia									914			914
Kenya	8	3	570	1		7			4,983		43	5,615
Mauritius			14	3	7	11		59	1			95
Zimbabwe			75	5		5			1,781		20	1,886
South Africa	11		493		18	69		121	284			996
Martinique			2			78		4				84
Colombia	4	5	36		8	37	17	7	5		84	203
Peru			186			77			6			269
Israel	75	2	1,772	7	19	275		137	6,192	1	434	8,914
Australia			36				1	1	55		2	95
Other	2	12	331	17	3	71	3	28	627	1	76	1,171
Total	7,366	2,051	69,008	323	1,227	22,903	374	4,667	17,154	17	7,577	132,667
Intra-EC	7,262	2,028	65,372	289	1,041	22,226	352	4,303	2,236	15	6,932	112,056
Extra-EC	104	23	3,636	34	186	677	22	364	14,918	2	645	20,611

Source: EUROSTAT

Table 012: 1990 EC Imports of Fresh Cut Flowers (EX. Roses/Carnations/Orchids/Gladioli/Chrysanthemum),11/1-5/31, 1,000 ECUs

	Belg/Lux	Denmark	Germany	Greece	Spain	France	Ireland	Italy	Neth.	Portugal	U.K.	Total EC
France	945	64	3,366	2	2			964	2,026	1	60	7,430
Belgium/Lux		56	50	1	6	1,087			145	1	4	1,350
Netherlands	20,221	7,586	251,047	2,020	6,298	118,816	1,666	27,488		92	35,725	470,959
Germany	144	177			3	118	1	30	1,031		36	1,540
Italy	583	622	20,874	23	5	3,807	1		2,339		1,053	29,307
U.K.		1,374	289		10	22	349		3,378			5,422
Spain	1	102	519	7		144	10	538	624	19	312	2,276
Canary Is.		2	99	5	443	1	3	9	59			621
Cote Ivoire	22		330	3	1	191		32	198			777
Ethiopia									2,049			2,049
Kenya	19	5	1,677	3		34		2	10,061		102	11,903
Mauritius			203	35	112	155		1,032	6		1	1,544
Zimbabwe			299	18		24			4,596		74	5,011
South Africa	40		2,245		94	281		573	567			3,800
Martinique			16			564		29				609
Colombia	17	8	156		34	166	92	51	26		336	886
Peru			1,161			594			37		1	1,793
Israel	337	19	7,650	52	110	1,047	1	1,131	26,785	6	3,190	40,328
Australia			264	1			5	7	275		6	558
Other	16	35	1,338	94	20	300	11	246	1,633	28	422	4,143
Total	22,345	10,050	291,583	2,264	7,138	127,351	2,139	32,132	55,835	147	41,322	592,306
Intra-EC	21,895	9,982	276,302	2,060	6,327	124,000	2,028	29,027	9,701	112	37,239	518,673
Extra-EC	450	68	15,281	204	811	3,351	111	3,105	46,134	35	4,083	73,633

Source: EUROSTAT

APPENDIX D

REPRESENTATIVE LIST OF EUROPEAN IMPORTERS

Appendix D

REPRESENTATIVE LIST OF EUROPEAN IMPORTERS

FRANCE

Florimex Paris
61, Avenue de la Vilette
94637 Rungis Cedex
Tel: · (1) 46 86 91 37
Fax: (1) 46 86 01 48
Telex: 46 86 01 48

Sarl Herman
200, Allee des Glaieuls
Fleurs 553
94641 Rungis Cedex
Tel: (1) 46 86 05 46
Fax: (1) 45 60 94 94
Telex: 205393

La Ville et Cie
259, Allee des Animones
Fleurs 283
94635 Rungis Cedex
Tel: (1) 46 86 05 92
Fax: (1) 46 86 15 23
Telex: 203202

On January 15, 1993 we called several French importers of cut flowers to verify contact information, and proceeded to ask them questions about market trends. We asked if they already import from Kenya and/or would they be interested in importing from Kenya in the future. If so, what products? We received the following responses:

1. Florimex Paris -- This importer felt that the rose market was actually on the rise, not on the decline as the data seem to show (particularly for high quality). Carnations are also on the rise, including mini-carnations. He does not deal in statice. He is not interested in more business from Kenya because he already has many Kenyan suppliers.

2. La Ville et Cie -- This company imports statice from Zimbabwe, but finds it is a very difficult market. The carnation market is significantly on the rise however and they import them from Colombia which they feel provides higher quality than those from Kenya. Roses are slightly on the decline.

3. Sarl Herman -- This importer said that they only import roses in the winter months because France grows most of its own roses. The little they do import comes from Morocco, though this year is less than last year and Morocco has a big rose market in Germany and Switzerland. Carnation imports are on the rise, mostly from Colombia. French carnation production is on the decline. The mini-carnation market is very strong right now especially in the summer. They import mini-carnations from Kenya, Turkey, and Colombia. They already have a supplier in Kenya and are, therefore, not interested in any new Kenyan suppliers. They also import alstrocemeuriat and astromar.

GERMANY

Cut Flowers, Cut Foliage

Everflora Blumenvertrieb GmbH
Flughafen Gebaude 131
D-6000 Frankfurt/Main 75
Tel: 069 691310
Tlx: 415482 flora d

Flaoratex GmbH
Flughafen Gebaude 458
D-6000 Frankfurt/Main 75
Tel: 069 6904511
Tlx: 411478 flor d

Florimex GmbH
Am Grunen Weg 5
D-6092 Kelsterbach
Tel: 06107 4090
TLX: 0417710 FXZE D

Givanni Semeria
Langenbeckstrasse 15
D-5800 Hagen
Tel: 02331 82044
Tlx: 823538 Seria d

LEA-Flor GmbH
Langer Kornweg 38
D-6092 Kelsterbach
Tel: 06107 5017
Tlx: 4170535 lea d

Rosenthal und Weitz
Nasshecker Strasse 1
D-5401 Dieblich-Mariaroth
Tel: 02607 4353
Tlx: 517791 rowei d

S.B.J. GmbH
Hugenottenallee 170
D-6078 Neu Isenburg
Tel: 06102 4134
Tlx: 4185566 sbi d

Straelener Blumenhandel
Heinz Kamman & Co. KG
Karl-Arnold-Strasse
D-4172 Straelen
Tel: 02834 6041
Tlx: 812254 sbnk d

Importers and Cultivators of Imported Cuttings and Young and Semi-Finished Plants

Dehner & Co.
Postfach 1160
D-8852 Rain/Lech
Tel: 09002 770
Tlx: 051313 dehner d

Hermann Tebarts
Wissenscher Weg 21
D-4178Kevelaer
Tel: 02832 6714

Hildebrandt und Grein
Am Haferweg 1
D-3200 Hildesheim-Neuhof
Tel: 05121 44088

Gebr. Theuerkauf
Postfach 2811
D-4150 Krefeld-Uerdingen
Tel.02151 55090

Hydrokultur Gregg GmbH
Berge 7a
D-4717 Nordkirchen 1
Tel: 02596 2066
Tlx: 0891812

Lehner-Gartenbau
Muhlweg 50
D-8500 Numberg
Tel: 0911 32684

Marion & Co.
Gartenbauhandlesgesellschaft
Von-Lettow-Vorbeck-Strasse
D-6630 Saarloius
Tel: 06831 1426
Tlx: 43166 mario d

Mohr Hydrokulturen Pflanzenvertrieb
GmbH & Co.
Pappelallee 39
D-8000 Munchen 50
Tel: 089 1501555

Rudolf Pfleger GmbH
Kolner Strasse 5
D-5093 Burscheid 2
Tel: 02174 60571

R.u.H Ziegeltrum
Baldhammerstrasse 15
D-8011 Vaterstatten
Tel: 08106 31011
Tlx: 528339 zigl

Schonemann & Weiss
Auf der Schwand 24
D-8510 Furth
Tel: 0911 731590

Witte GmbH
Busenpfad 100
D-4150 Krefeld
Tel: 02151 562168

Importers of Cuttings, Canes and Semi-Finished Plants

A. van Den Akken Hoek Van Holland BV
Dirk van den Burgweg 37
3151 XM Hoek van Holland
Tel: 0147 3600
Tlx: 36541

Horticoles "Marion" Import-Export BV
PO Box 240
1430 AE Aalsmeer
Tel: 02977 29 811
Tlx: 10144

Hyro Plant Nederland BV
PO Box 50
1430 AB Aalsmeer
Tel: 02977 26021
Tlx: 18475

Latoplant BV
PO Box 149
1430 AC Aalsmeer
Tel: 02977 41 155
Tlx: 12315

Jan Verkade
Van Rijckevorsellaan 6
2691 NK The Hague
Tel: 01748 4019

Koburg BV Tropical Plant Nursery
PO Box 507
2665 ZM Bleiswijk
Tel: 01892 7455
Tlx: 25205

K Edelman BV
PO Box 40
2810 AA Reeuwijk
Tel: 01829 3544
Tlx: 20980

Kwekerij Plantessa
Oudendijk 9
2676 NC Maasdijk
Tel: 01745 6477

Leen de Mos Tropica BV
PO Box 54
2690 AB s'-Gravenzande

Maanen & Mantel Plantex BV
Noorddammerweg 95
1187 ZS Amstelveen
Tel: 020 472 211
Tlx: 11551

Main Importing Auctions

Bloemenweiling Westland (CCWS)
PO Box 220
2670 AE Naaldwijk
Tel: 01740 23 333
Tlx: 32233

Verenigde Bloemenweilingen (VBA)
Legmeerdijk 313
PO Box 1000
1430 BA Aalsmeer
Tel: 02977 34 567
Tlx: 15484

Other Useful Addresses

Centre for the Promotion of Imports from
Developing Countries (CBI)
PO Box 30009
3001 DA Rotterdam
Tel: (010) 130 787
Tlx: 27151

Commodity Board for Floricultural Products
(Stats, market news, etc.)
Produktschap voor Siergewassen (PVS)
Bezuidenhoutesweg 155
The Hague
Tel: 070 814 631
Tlx: 31406

Plant Protection Service
Head Office
Plantenziektekundige Dienst (PD)
Geertjesweg 15
6706 EA Wageningen
Tel: 08370 19 001

Importing/Producing Sales Co-Operatives for Cut Flowers, Foliage and Pot Plants

Niederrheinische Blumenvermarktung e.G.
(NBV)
Hammer Landstrasse 103
D-4043 Neuss
Tel: 02101 1871
Tlx: 08517635 nbvt d

UGA Niederrhein GmbH
Hans-Tenhaeff-Strasse 44
D-4172 Straelen
Tel: 02834 7010
Tlx: 0812223 ugast d

Importers/Agents for Cuttings

Selecta Klemm
Hanfacker 8
D-7000 Stuttgart
Tel: 0711 531007
Tlx: 725474 Klem d

Yoder Plant Trading GmbH
Kl. Munsterstrasse 1-3
4710 Ludinghausen
Tel: 02591 5644

NETHERLANDS

Cut Flowers, Cut Foliage and Plants

J Baardse & Zonen's
PO box 1007
1430 Aalsmeer
Tel: 02977 20 551
Tlx 16309

BDK Bloemen Import-Export BV
PO Box 104
1431 GB Aalsmeer
Tel: 02977 23 288
Tlx: 18140

Bloemenexport/Import BV
W. Tuning
PO Box 1041
1430 BA Aalsmeer
Tel: 02977 24 575
Tlx: 12679

Cor van Duyn
PO Box 98
2230 AB Rijnsburg
Tel: 01718 29 314
Tlx: 39378

Fa> W. Luyendjik
Voorweg 1a
3237 LZ Vierpolders
Tel: 01810 3687

Florimex Import BV
Molenweg 247
1436 BV Aalsmeerderbrug
Tel: 02977 25 555
Tlx: 18127

Holland Plant International BV
PO Box 77
1430 AB Aalsmeer
Tel: 02261 1573
Tlx: 57586

Klaas van Zijverden BV
Import/Service Department
Turfstekerstraat 35-37
1431 GD Aalsmeer
Tel: 02977 22 752
Tlx: 10032

Kurt Schrama BV
PO Box 1128
1430 BA Aalsmeer
Tel 02977 28 979

Maanen en Mantel BV
PO Box 30
1430 AA Aalsmeer
Tel: 02977 25 757
Tlx: 11551

Van Staaveren Bloemenexport BV
PO Box 265
1430 AG Aalsmeer
Tel: 02977 24 638
Tlx: 18163

S. Zurel & Co. BV
PO Box 1175
1430 BD Aalsmeer
Tel: 02977 23 255
Tlx: 13590

UNITED KINGDOM

Importers/Wholesalers

Collingridge, J. Ltd
Flower Market
New Covent Garden Market
London SW8 5ND
Tel: (071) 720 6917

David Ingamells Limited
New Covent Garden
London SW8 5ND
Tel: (071) 720 9393
Tlx: 919741

Fyffes-Monro Flowers
249 Flower Market
New Covent Garden Market
London SW8 5ND
Tel: (071) 7208901
Tlx: 915 945

Klein & Simms Limited
276-280 Flower Market
New Covent Garden Market
London SW8 5ND
Tel: (071) 720 5406
Tlx: 915241 KANDS G

Mack and J.V. White
Horticultural Market
Wholesale Markets Precinct
Birmingham B5 6UN
Tel: 021 622 4111
Tlx: 338611

Importers of Young Plants and Cuttings

Peter Murison Plants
South House
34b High Street
Hoddesdon
Herts EN11 8BY
Tel: 0992 464849
Tlx: 883766 ACORN FOR PM

Ruaton Gardens
St Johns Road
Clacton-on-Sea
Essex
Tel: 0255 821050

Major Pot Plant Producers/Importers of Young Plants and Cuttings

Challis of York Limited
Poppleton Nurseries
York YO2 6NG
Tel: 0904 796161

Geest Horticultural Group
Plants Division
The Chestnuts, Low Road
Spalding
Lincolnshire
Tel: 0775 61111

Keith Butters
Kellet Gate
Spalding
Lincs.
Tel: 0775 68831

P.A. Moerman Limited
Sandpit Nursery
Pinchbeck
Spalding
Lincs.
Tel: 0775 85389

Stuart Low & Co (Enfield) Limited
Park View Nurseries
Crews Hill
Enfield
Middx.
Tel: 081 363 0104
Tlx: 21903

Brooks Brothers Ltd
Smithfield House
Digbeth
Birmingham B5 6BS
Tel: 021 622 2625
Tlx: 336707

Continental Farms
Unit 7
Fleming Way
Iselworth
Middx. TW7 5EU
Tel: 081 569 9995

Crystal Imports Sales Ltd.
Unit 6
River Gardens Business Centre
Spur Road
Feltham
Middx. TW14 0SN
Tel: 081 844 0050

W. Daniel & Son Ltd.
Smithfield Market
Pershore Street
Birmingham
West Midlands
Tel: 021 622 4771
Tlx: 336707

John Dennis (Flowers) Ltd.
Smithfield Market
Pershore Street
Birmingham
West Midlands
Tel: 021 643 8374
Tlx: 338968

Florimex Limited
Florimex House
Clayton Road
Hayes
Middx.
Tel: 081 569 2348

Franci Nicholls
New Covent Garden
London SW8
Tel: 071 720 8355/6

The House of Heyes Ltd
13/14 Market Centre
Western International Market
Hayes Road
Southall
Middx.
Tel: 081 848 4555
Tlx: 934310

J & E Page Ltd.
230-238 Flower Market
New Covent Garden
London SW8
Tel: 071 720 9432

Clearers

Pan Express
Unit 7
Ascot Road
Bedfont
Feltham
Middx. TW1X 8QH
Tel: 0784 251115

PTC
Gatwick Gate Estate
Lowfield Heath
Crwaley
West Sussex
Tel: 0293 518153
Tlx: 877706

Flower Importer's Trade Association
c/o Crystal Import Sales Ltd
River Gardens Business Centre
Spur Road
Feltham
Middx. TW14 0SN
Tel: 081 844 0050