

Exporting roses to France

France is an important European market for cut roses. Imports of cut roses in France grew from €112 million in 2011 to €135 million in 2015. Specialised flower shops and kiosks are the dominant market channel. At the same time, large French hypermarkets and supermarkets sell quality flowers at lower prices. Further development of the supermarket channel in France may be an opportunity for exporters from developing countries. Working together with Dutch wholesalers/exporters is a good way to enter the French market.

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Product description

The rose (*Rosa*) is a woody perennial plant of the genus *Rosa* in the Rosaceae family. Standard cut roses vary in size (large and intermediate Hybrid Tea, and smaller Sweetheart roses), in colour (from white to red and combinations), in fragrance and other attributes. Most commercial cut roses carry one bud per stem; *Floribunda* or spray roses carry more buds per stem but are commonly regarded as garden flowers. Most species are native to Asia, with some native to Europe. After harvest (in bud), roses are stored and transported under cooled conditions until sale at the retail level. Roses are mostly sold as mono bunches or used in bouquets and other flower arrangements. Some exquisite varieties are sold as single flowers.

The HS code for roses is 060311 - Fresh cut roses and buds, of a kind suitable for bouquets or for ornamental purposes.



Cut flowers on display at a French market. Source: Shutterstock.

Fresh cut roses are traded in different specifications. Usually, roses are sorted and graded according to the length, colour and size of the flower. Different customers have different requirements. In France, there is local production of cut roses as well as import. The Netherlands is the main partner for imports of cut roses in France. A significant share of the roses imported from the Netherlands are re-exports from developing countries. Specialised Dutch wholesaler/exporters source cut roses from the Dutch flower auction ([Royal FloraHolland](#)) or

directly from importers, who source the flowers from developing countries and export them to France.

Specific requirements for quality, size, packaging of and product information are set by the Dutch Flower Auctions Association (VBN) in agreement with growers and traders. These requirements must be met by growers to sell at the auction. The auction serves as an important trade platform for exporters from developing countries. We refer mainly to these requirements that are widely adopted as minimum requirements across the entire cut flower chain. Keep in mind that specifications and requirements may differ when exporting directly to the French market or through other channels.

Quality

The VBN requirements consist of two parts: [general requirements](#) for all flowers and [specific requirements for cut roses](#). Products which do not meet the requirements for pretreatment, minimum quality, bacteria content and ripeness are not traded and are destroyed if necessary (VBN). Please study the requirements carefully through the links above, as the details given below only represent a brief summary of the full list of requirements.

Cut flowers are traded in three quality groups: A1, A2 and B1. A1 roses must meet all the minimum requirements for internal quality, freshness, freedom from parasites, damage, deficiencies, deviations, contamination, absence of leaves on the lower 10 cm of the stem, stems that are straight and sturdy enough to bear the flower, uniformity of colour, thickness, sturdiness and bouquet volume, and proper packaging. Any deviations from these requirements may result in downgrading from A1 to A2 or B1. Cut flowers that do not meet the minimum criteria for B1 are not traded.

The batch must be free of growth defects including flat buds, grass hearts and crooked necks.

Roses are graded according to:

- Length: all Rosae must be bunched so that the stems in the bunch are even at the bottom;
- Ripeness;
- Number of bloomable buds;
- Height of flower bud: graded in 1-cm classes; the grade can be mentioned in the grade code by using characteristics code S19; the smallest height in the batch determines the code to be indicated;
- Number of stems per bunch.

Growers are responsible for the grading and the reliability of the information that they provide with their lot at the flower auction. The auction monitors customers' claims for refunds to check supplier reliability. Such claims may arise from the provision of incorrect product information on the consignment note or labels. The [Quality Index \(QI\)](#) is based on the number of customer refund claims or other complaints over the past eight weeks. Information on your QI is shared with customers and reported back to you. In general, a grower's good reputation is often rewarded with a higher average price per stem.

Packaging

Imported roses are often traded in cardboard boxes. The quantity of roses in these boxes is increasing to reduce costs. Roses are often shipped without plastic sleeves to avoid the build-up of humidity. After arrival, the roses are often repackaged at the auction or by specialised importers. They are usually put into plastic flower containers (buckets) and supplied to the auction in the Netherlands or redistributed to an exporting wholesaler. The Dutch flower auction is nowadays testing the auctioning of the cut roses without unpackaging them from the cardboard boxes, in order to improve the efficiency of the logistics process.

Roses that are supplied to the auction (separate requirements exist for *Rosa floribunda*) must be:

- Supplied in bunches of 10 or 20 stems;
- Provided with separate foil packaging for each barrel unit (except for Freiland roses);

- Bunched with all flower buds at the same level or in two layers. With two layers, the separate layers may not touch each other;

Supplied in clean water (containing the prescribed pretreatment agents).



Cut roses in a box. Source: [FlowerWatch](#).

Labelling

When exporting to France through the Dutch flower auction, every stacking cart must be accompanied by a fully and correctly completed consignment note containing all required information about the stacking cart. Refer to the VBN [general product specifications for cut flowers](#) for the list of required information. In addition, every packaging unit needs to be labelled with product and supplier information, namely:

- Supplier number
- Variety name
- Amount (e.g. stems) per packaging unit (e.g. bucket)
- Grading marks (Class A1, A2, B1)
- Supplier name

Additional product labelling will generally take place at the auction/wholesaler or bouquet producer and is often required for direct trade. The barcode and/or QR code, article code, selling price and other details required by the buyers should already be printed on labels.

Tips:

Visit the [VBN](#) website regularly to find out about changes in product specifications.

Contact your import agent or your potential client about any additional requirements if you wish to supply directly to the European import market, bypassing the auction clock system.

1. What makes France an interesting market for cut roses?

As can be seen in the [CBI Trade Statistics for cut flowers and foliage](#), French consumers on average spend about €47 per year on cut flowers. This makes France one of the European countries that has a relatively high consumption of cut flowers per capita. Because France is also one of the larger European countries with 66

million inhabitants, it is a major market for cut flowers, estimated at a total of €3.1 billion. The total EU market for cut flowers was estimated at around €20 to €25 billion in 2014 (calculations by Wageningen Economic Research, based on 2015 data from Rabobank and Eurostat population statistics). Based on sales, roses remain the great favourites for French consumers (FloraHolland Fact and Figures for France, 2016). The market share of roses as a percentage of the total cut flower and foliage sales in France is estimated at 30%. It is expected that the French market for cut roses will only grow moderately in the next five years, mainly due to slowly recovering economic growth.

Roses are sold in bouquets, as mono bunches, or as single stems, and are often bought as a present. In France, about half of all cut flowers are sold in bouquets and 30% in mono bunches. The most important colours are red, pink and white. Peak days play an important role in the market for cut roses. In France, important flower days are among others Valentine's Day (14 February), Mother's Day (usually the last Sunday in May), the French National Day of 14 July, Secretary's Day (April) the Liberation Days of the First and Second World Wars (11 November and 8 May), the Christian holidays of Easter and Christmas, as well as a special day of Saint Fleur (5 October).

Being innovative and offering clients new varieties will improve your company's profile. Make sure to inquire with your customers first about the trends of tomorrow, however, and test market responses; e.g. by producing and offering small batches first.

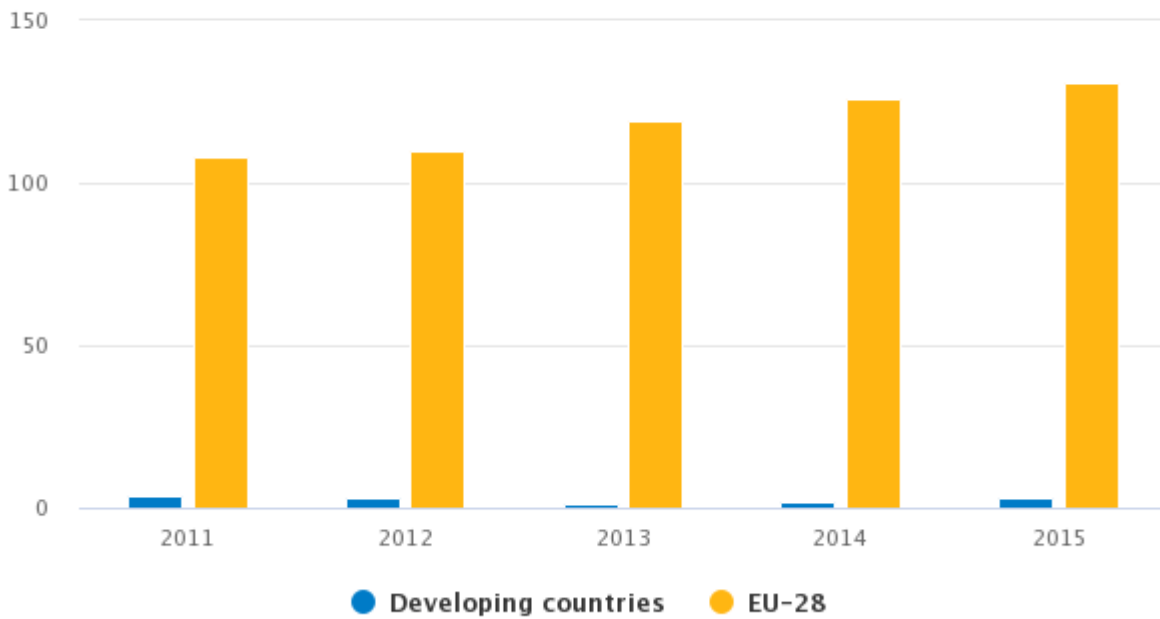
Tips:

Find out what kind of colours, sizes and varieties your clients need, and learn about new trends by talking with your potential buyers.

Make sure that you are aware of the [peak days](#) and integrate this information in your production planning.

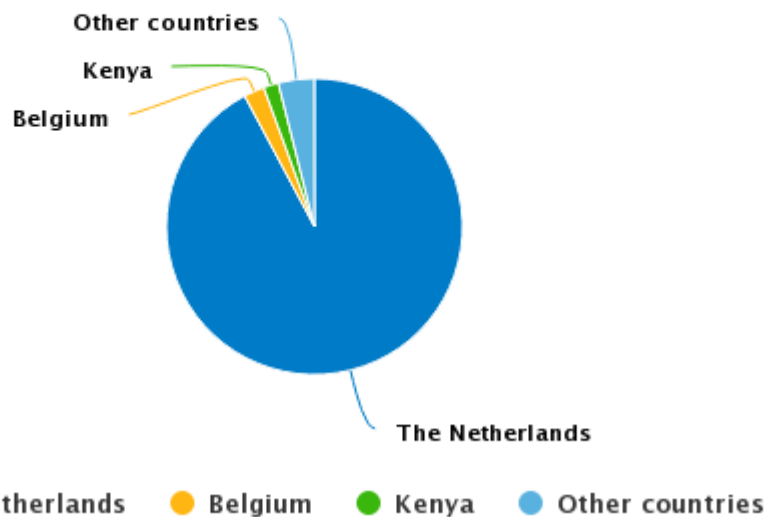
Imports of cut roses to France decreased in value during the economic recession that hit Europe in 2009. From 2012 onwards, the market has recovered and imports of cut flowers have been increasing to a value of about €135 million in 2015. The Netherlands is by far the largest supplier of roses to France, with 92% of the market value in 2015. Imports from developing countries are often administratively handled by the Dutch Flower Auction and are registered as imports from the Netherlands. A large share of these roses are actually re-exports from developing countries. In recent years, Ethiopia and Colombia are increasing direct sales to the French market. Kenya and Ecuador have been supplying to the French market for at least a decade.

Figure 1: Imports of cut roses in France



Source: Eurostat Comext. Calculations Wageningen Economic Research.

Figure 2: Division of import value of cut roses (intra- and extra-EU trade) in France, by exporting country (in 2015, in %)



Source: Eurostat Comext. Calculations Wageningen Economic Research.

France is also a producer of cut roses. In 2009, French growers produced 190 million stems of cut roses. Important producing regions are the Var region in the south and the Finistère region in Brittany in the west. In 2014-2015, about 5% of the cut roses traded at the Rungis wholesale flower market near Paris were of French origin (source: RNM FranceAgriMer). The acreage of total cut flower production has increased somewhat in France since 2008, to about 3,000 hectares. France also has some leading breeding companies. A well-known French breeder of roses is [Meilland](#). Most French production is on the market during the summer months from April to September, although production actually takes place year-round in greenhouses.

A leading wholesaler of flowers in France is Agora Group, which buys mostly from the Netherlands, Italy and France, and which sells flowers to specialist florists through cash and carries. Another leading wholesalers in France is the Dutch-based FleuraMetz.

Tips:

The Netherlands is an important trade hub for cut roses and is the main destination for roses from developing countries. Therefore, consider trading via the [Dutch wholesale industry](#). They have experience in supplying to all European markets.

All the main importers are usually present at the main flower exhibitions such as [ProFlora](#) in Colombia, [IFTEX](#) in Nairobi, Kenya or the [Naivasha Horticultural Fair](#) in Kenya.

You can find monthly and annual import statistics on the [Eurostat website](#).

During summer, the supply of roses produced in France is at its peak, resulting in lower prices on the European market. Pay attention to this price cycle when planning production.

2. What trends offer opportunities on the French market for cut roses?

The most important trends affecting cut roses on the French market are the remaining dominance of the traditional florists and kiosks, and the increase in internet sales. You can find more information on general trends and developments on the European market for cut flowers in [CBI Trends](#).

Florists and kiosks remain the dominant outlet in France

As in many other European countries, florists and flower kiosks are the main sales channel for cut flowers in France (about 70% in 2013). Unlike many other European countries, however, the market share of supermarkets remains relatively low at about 14%. Although the market share of supermarkets is increasing, this growth is much slower than in most other European countries.

Tip:

Consider if your European trading partner (French or Dutch importer) focuses on supplying to the florist or supermarket channel. If your export strategy and assortment aims for the florist segment, a supermarket supplier is not the party that you are looking for.

Discount segment and online sales are growing

The French grocery and convenience retail market has seen moderate growth since 2012. Especially the discount stores have gained popularity, partly due to slow economic growth. The discount segment increased by about 13% in sales value between 2012 and 2016, where the average growth of the groceries and convenience market in France was about 9%. At the same time, supermarkets and discounters are increasing their market share in the sales of cut flowers. Cut roses (mostly Sweethearts) are a major product in supermarket flower sales.

A trend that is closely related to the gradually increasing market share of supermarkets is the increase in direct

trade between producers and traders in the Netherlands or France, bypassing the Dutch flower auction. Wholesale traders set a wide variety of buyer requirements (based on the requirements set by their client) that may deviate from the general auction requirements. This market channel is demanding in terms of product and logistics requirements, but it may offer opportunities to companies that are well managed and have some experience with supplying to the French market.

French consumers are, just as British consumers, very familiar with the online purchase of flowers. Online shopping still represents only a fraction of the total sales, although it doubled in value between 2012 and 2016 (source: IGD).

Tips:

There might be additional buyer requirements for trading on the direct market, especially in the supermarket segment. Contact the wholesaler to verify the requirements that you need to fulfil in order to supply to them. Requirements often differ per supermarket.

If you are ready to trade on the direct market, explore growing market segments such as the supermarket retail channel.

E-commerce in the supply chain

IT systems have been introduced into the marketing process. Online business (e-commerce) is taking over the physical buying process at the auction and at wholesale cash and carries. Telephone calls are replaced by mouse clicks in the web shop. This has had a significant impact on trade. Examples include the auction's distance buying system and linked web shops for both the auction and the wholesale trade. This leads to the disconnection of physical supply logistics from the actual trading place. Purchases are based on a digital product image. Growers therefore need to pay constant attention to consistent quality and reliable information, as wholesalers prefer to work with the most reliable suppliers. Unreliable or false information about product quality may lead to a lower "quality rating" and a loss of sales.

Tips:

E-commerce requires information standards and reliability in terms of quality and the information provided. Learn about buyer requirements, quality control and e-commerce-related IT systems. Check [Floricode](#), a sector initiative for the registrations, standards and codes for information management in the ornamental industry.

IT systems are vulnerable to trust issues. Be consistent and as honest as possible when supplying digital information about product quality.

Stocks for online shops are increasingly held at suppliers (upstream) with integrated stock management systems. This requires growers and exporters to respond quickly and efficiently to orders.

The Dutch Association of Wholesale Trade in Horticultural Products (VGB) and the Dutch Flower Auction Royal FloraHolland can provide a range of information about available software systems and electronic applications.

Increasing demand for socially responsible rose production

In France, as in most European countries, the demand for roses that are certified as socially responsible and environmentally friendly is increasing. Many retailers require suppliers to comply with production standards that involve Good Agricultural Practices or environmental and social standards, including MPS-ABC, GlobalG.A.P. or Fairtrade. Large retailers generally ask for a variety of certificates. This trend is less prominent in the traditional florist and market stalls sales channels. The main elements of environmental sustainability are energy consumption during transport, pesticide use and water use. These elements are translated into the various certification schemes. In 2015, 106 French growers of roses and other plants participated in the environmental MPS scheme, representing 2,679 hectares of French flower and plant production.

Tips:

Larger French retailers (supermarkets and hypermarkets) are starting to demand social standards such as Fairtrade or MPS-SQ. Retailers often ask for a variety of certificates. Find out which retailers are asking for which combination of certification schemes and how you can comply.

Compliance with these schemes should not be taken lightly. Audits take place on a frequent basis.

Find more information about sustainability and corporate social responsibility certification schemes at [ITC Standards Map](#) and [CBI Buyer Requirements](#).

Top quality and longer vase life

Quality is a prerequisite for supplying to the French market. Good quality is important in every market channel, also for low-priced flowers. A guaranteed vase life of six days is often regarded as the minimum for roses in France.

Tip:

A long vase life is essential to successfully supplying to the French market, so make sure that the product is cut while the bud is still closed and is treated well during transport.

3. What requirements should cut roses comply with to be allowed on the French market?

What legal and non-legal requirements should my product comply with?

Plant health

Roses exported to France must comply with European Union (EU) legislation on plant health. The EU has laid down phytosanitary requirements to prevent the introduction and spread of organisms harmful to plants and plant products in the EU.

Tips:

Check with the relevant [National Plant Protection Organisation](#) for the exact procedures for obtaining the phytosanitary certificate.

A model phytosanitary certificate can be found in [Annex VII](#) of the Plant Health Directive.

Roses imported to the EU must be accompanied by an official "phytosanitary certificate" guaranteeing the phytosanitary conditions of the plants and plants products, as well as that the shipment has been officially inspected, complies with statutory requirements for entry into the EU, and is free of quarantine pests and other harmful pathogens. Phytosanitary certificates are issued by your National Plant Protection Office (NPPO).

Tips:

Check if your country and the country that you want to export to have implemented digital services to facilitate the import and export process. For example, the Netherlands has the [CLIENT Export](#) system, which is also used by the Kenyan and Ugandan inspection authorities.

Read more about [plant health](#) in the EU Export Helpdesk.

Intellectual Property Rights (IPR)

Developing new rose varieties is often very expensive. The developers of new varieties want their return on their investments. To prevent just anybody from using these new varieties, they are protected by intellectual property rights. In recent years, there has been an increasing focus on breeders' rights, and illegal products are rejected from the market.

Tips:

Make sure that you know exactly who owns the IPR for your species and pay the necessary royalties.

An interesting trend is that breeders only allow their new variety to be grown by a select group of growers. Staying in contact with breeders and offering perfect conditions for growing their new variety may therefore be an advantage.

Familiarise yourself with the protection frameworks for new plant varieties; for example, from the [Union for the Protection of New Plant Varieties](#) (UPOV) or the [Community Plant Variety Office](#) (CPVO).

Full overview of requirements for cut flowers

For a list of requirements for roses, consult the [EU Export Helpdesk](#), where you can select your specific product under chapter 06031100.

What additional requirements do buyers often have?

CSR - Corporate Social Responsibility

French consumers are paying more and more attention to social and environmental circumstances during the production of roses. As a result, buyers require you to meet certain environmental and social standards in the form of certification of B2B schemes and consumer labels. Compliance with environmental standards (focusing

on Good Agricultural Practices, pesticide use and water use) is a very common requirement, while social conditions are gaining importance. Large supermarket chains such as Carrefour are especially stringent and require certified sustainable production from their suppliers.

Tips:

Both buyers and consumers (especially in western and northern Europe) consider environmentally friendly production very important, and this importance is expected to increase in future. Becoming certified is essential.

Use your good practices and certification as a marketing tool when communicating with potential buyers.

There is an abundance of standards to choose from (although the actual criteria show a lot of similarities). To determine which scheme you should follow, the market that you are targeting will probably be decisive (which country do you want to export to and which trade channels do you use?).

The most important B2B quality schemes for roses are MPS, GLOBALG.A.P. and Fairtrade. The MPS organisation offers several standards, of which MPS-ABC certification covers environmental performances and is considered a must for growers. Furthermore, there are several other schemes such as MPS-SQ (focusing on social issues), MPS-GAP (on Good Agricultural Practices) and MPS-Quality. The most comprehensive standard is MPS-Florimark, which is a combination of the aforementioned four schemes. In France, over a hundred growers are MPS certified, indicating the relevance of the scheme in the French market.

Tips:

Consult [Channels and Segments](#) to see how market channels are changing.

[MPS](#) gives an overview of all MPS schemes, including links to the criteria per scheme.

Compare the requirements for different certification schemes by consulting the [ITC Standards Map](#).

GLOBALG.A.P.

[GLOBALG.A.P.](#) is a B2B scheme originally focusing on Good Agricultural Practices. GLOBALG.A.P. has been the most important scheme for fruit and vegetables for years, but it is gaining importance for roses as well, especially with regard to sales to supermarkets. Several other standards are benchmarked against GLOBALG.A.P.

Tips:

[GLOBALG.A.P.](#) gives an overview of all the standards for flowers and ornamentals.

Look for existing initiatives in your country. Examples are the Colombian [Florverde](#) standards or the code of the [Kenyan Flower Council](#). Sometimes, these local initiatives are benchmarked against GLOBALG.A.P.

Cold chain management

Proper cold chain management has a positive effect on the quality and vase life of roses. Therefore, buyers' demands for cold chain protocols are growing. Note that although improving your cold chain management may be a challenge, the higher product quality should also improve your profits.

Tips:

Developing and implementing cold chain protocols will be vital to survival in the coming years.

Do not wait until buyers ask for improved cold chain management but anticipate the developments.

What are the requirements for niche markets?

Fairtrade certification

Although CSR requirements are common buyer requirements in the unspecialised supermarket channel, standards that are communicated through a consumer label still represent a relatively small part of the market in France. Examples of relevant consumer labels are [Fair Flowers Fair Plants \(FFP\)](#) and [Fairtrade International](#). The market share of Fairtrade roses increased considerably in the past couple of years, particularly in the supermarket segment.

Tips:

Always check with your buyers if they require certification and, if so, which certification they prefer.

Consult the [Standards Map database](#) for the different labels and standards relevant to cut flowers.

Organic

The market for organic roses is very small. Organic roses must be produced and processed by natural methods defined in [EU legislation](#). Some flower traders perceive organic flowers as a lesser-quality product due to a lower aesthetic quality and durability. As such, organic flowers are not yet particularly favoured in France.

Tip:

Growing organic roses could represent an opportunity in future.

4. What competition do I face on the French cut roses market?

There is only a modest production of cut roses in France. Rose production has been in decline for a long time. In 2009, about 190 million roses were produced in France, while over 470 million stems were imported. More recent data are unavailable. At the Rungis wholesale market, however, it is reported that less than 5% of the roses sold were of French origin in 2014-2015 (source: [RNM](#)). The main production regions for cut roses are the Var region in the south of France and Le Finistère in the west of the Brittany region. French roses are known for

their good quality, length and varieties. The total acreage of cut flower production has actually increased somewhat in France since 2008. A well-known French breeder of roses is [Meilland](#). Most French production is on the market during the summer months from April to September.

Competition in the EU cut flower market changes during the season and from year to year, as production and demand differ. On the whole, competition is high. Competition in the EU market for cut roses does not differ from competition for most other major types of cut flowers. More information about competition on the EU cut flower market can be found in general information on [Competition for cut flowers and foliage](#). Importers of cut flowers in France – just as importers in most countries – pay a lot of attention to price and quality, continuity in quality between shipments, freshness, flexibility and reliability. The interpersonal relationship between buyer and seller is also highly valued, where suppliers need to be available for questions and be transparent and communicative. Speaking French fluently is often regarded as a major asset.

5. Through which channels can you get roses on the French market?

In France, most cut roses are bought from Dutch exporters (wholesalers). A few French wholesalers and retailers either purchase their roses themselves via the Dutch flower auction and/or import directly from developing countries. There are a number of important wholesale markets for cut flowers. The most important are [SICA MAF Hyères](#) in the south, which also operates an auction, and [Rungis](#) near Paris. Products from the Netherlands and developing countries are sold at these wholesale markets, along with local flowers.

In France, florists and kiosks are the dominant sales channel for cut flowers. According to [Floraculture International](#), 15,260 florists shops account for 37.4% of all flower and plant sales in France. Other figures indicate that 70% of cut flowers are sold by florists or kiosks. However, small florists are increasingly under pressure, as 20% of flower and plant purchases are now made at chain stores. The chain stores combine handtied bouquet expertise with centralised purchase and service capabilities. This position allows them to offer fresh attractive bouquets at a reasonable price. The two main chain companies are Emova (formally Monceau Fleurs) with 354 retail outlets and FloraNova with 160 shops.

Supermarkets have a market share of about 14%. In contrast to many other countries, the market share of supermarkets has not grown much in France. In the next few years, the market share of supermarkets is expected to grow just a little bit to 15%. Nevertheless, supermarkets sell almost 25% of the volume of flowers, indicating the much lower prices of flowers sold in supermarkets.

The largest French supermarkets are Leclercq, Carrefour and Intermarché of Les Mousquetaires Group, which also owns the Netto discount stores. Casino is another large retailer, which owns supermarkets stores under different brands such as Casino, Monoprix and Franprix. These supermarkets are generally smaller and located inside the city and town centres or neighbourhoods, whereas the large hypermarkets are located on the outskirts of the cities. Smaller supermarkets generally offer a very limited assortment of flowers, if they sell flowers at all. The larger supermarkets and hypermarkets sell a wider variety of flowers and generally have a special display for flowers.

Table 1: Largest French hypermarkets, supermarkets and food discount stores, number of stores and turnover in 2015

Retailer	Retail format	Number of stores (2015)	Turnover (2015), in € million
Leclercq	Hypermarkets	489	37,167
	Supermarkets	90	1,315
Carrefour	Hypermarkets	234	21,150
	Supermarkets	961	14,076
Les Mousquetaires	Hypermarkets (Intermarché)	84	2,577
	Supermarkets (Intermarché)	1,365	22,160
	Discount (Netto)	319	1,036
Auchan Group	Hypermarkets	145	16,819
	Supermarkets	419	4,286
Casino France	Hypermarkets	673	4,767
	Supermarkets	1,694	9,293
	Discount	1,694	3,321
Système U	Hypermarkets	67	3,355
	Supermarkets	768	13,585
Lidl France	Discount	1,575	8,310
Louis Delhaize	Hypermarkets (Cora)	59	4,463
	Supermarkets	125	1,117
Aldi France	Discount	1092	3,696

Source: IGD

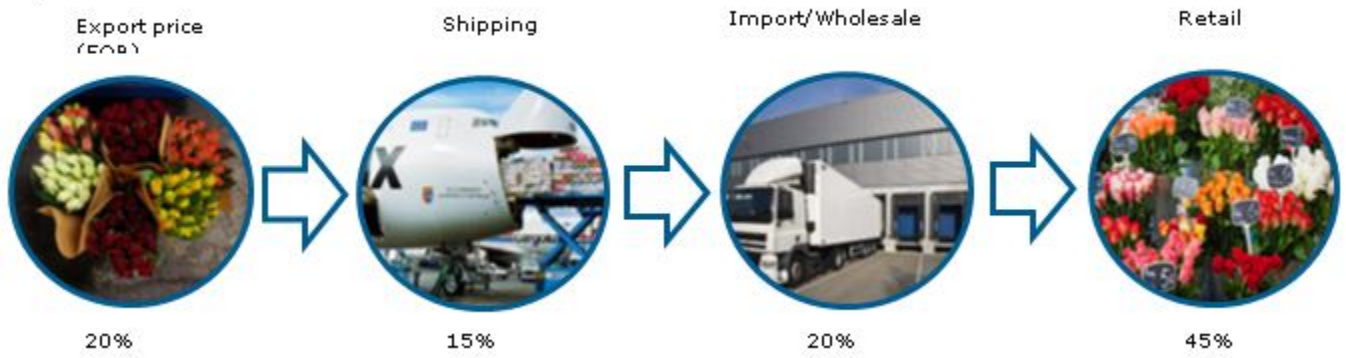
Tips:

You can find more information about trade channels and market segments in our study of [Trade channels and market segments for cut flowers and foliage](#).

6. What are the end-market prices for cut roses?


Roses are sold as mono bunches, in bouquets or as single stems. In May 2016, cut roses (50 cm) earned about 50 to 80 eurocents per stem at the wholesale level (Hyères auction and Rungis), depending on the variety. At the consumer level, a mono bunch of 21 medium-sized red roses currently sells for about €30 to €40 when bought at a florist shop, or €1.5 to €2 per stem. Prices of bouquets are higher for larger stems and special varieties, or when foliage is included. A bunch of 10 or 12 small roses in the supermarket sells for much less, between €2 and €7 depending on the store and the time of year. Prices are generally much higher during peak days such as Valentine's Day (14 February). Figure 5 below gives an estimation of the average price breakdown. The cost of shipping cut flowers to France amounts to about 20-40% of the export value (Free On Board, FOB) through transport costs, insurance, tax and documentation costs depending on the distance, and some country- or airport-specific costs.

Figure 5: Price breakdown




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