

Rural Migration News

Blog 272

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Global Floriculture

Flowers and indoor potted plants are grown locally or imported from other countries. Most cut flowers and indoor potted plants are sold in North America and Western Europe, and many are imported. The major sources of flowers that cross national borders include Colombia and Ecuador for North America and Kenya and Ethiopia for Western Europe. The Netherlands is the global hub for trade in flowers and ornamental plants.

Roses are the most valuable cut flower that is traded, accounting for a third of all cut flower exports in 2020. The Netherlands looms large in flower data because the country is a major producer of flowers and many flowers produced elsewhere are sold at the Royal FloraHolland near Aalsmeer.

Colombia is the major source of cut flowers for the US, exporting flowers worth \$1 billion a year by ship from both Atlantic and Pacific Ocean ports and flying flowers from Bogota to Miami. Colombia is the source of 60 percent of US cut flower imports.

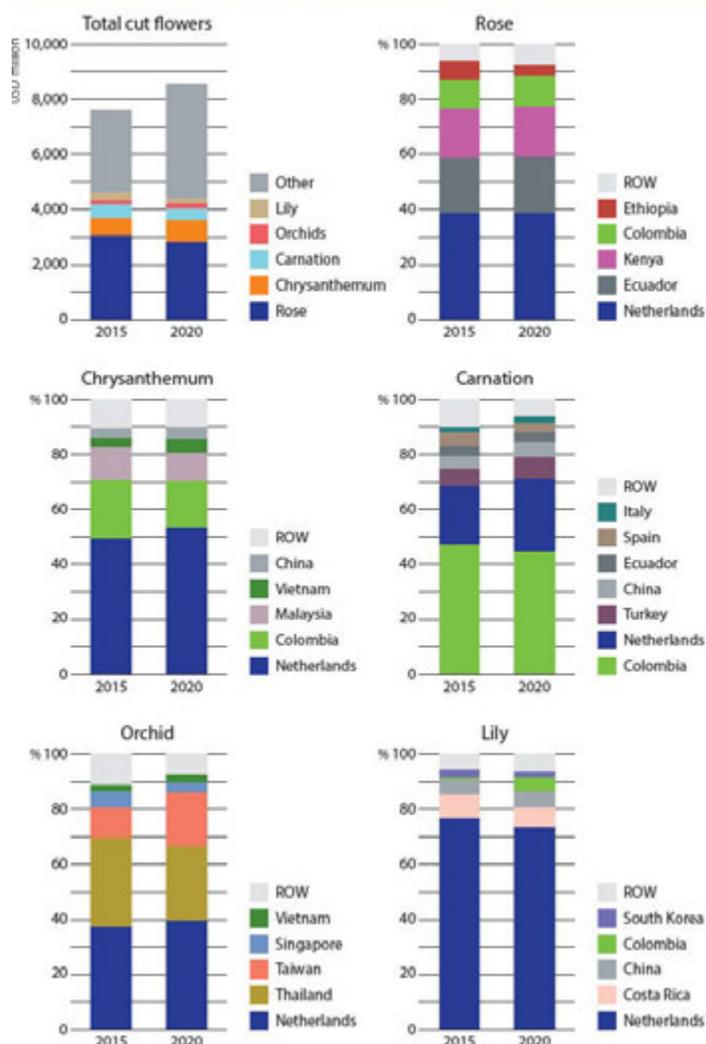
Kenya and Ethiopia supply most of the \$1.1 billion worth of cut flowers

that are imported by the EU. Most African flowers are flown to Amsterdam and auctioned to buyers from around Europe. Trade data suggest that most UK cut flowers are from the Netherlands because they pass through Aalsmeer.

Cut flowers are purchased in street kiosks, garden centers, and online. During covid, street sales diminished while online sales rose. Some countries required garden centers to close during covid lockdowns, while others allowed them to remain open. Most US states allowed home improvement stores, which often include garden centers, to remain open during covid, contributing to a sharp jump in sales

The Netherlands is a Global Hub for the Production and Sale of Flowers

Global cut flower exports by flower type, 2015 vs. 2020



of flowers and potted plants to \$47 billion in 2021, double annual sales a decade earlier.

Most cut flowers move by air from growers to reception hubs and retailers. The pandemic curbed air travel, so more flowers and related commodities are moving by sea, especially from Colombia and Ecuador to the US.

FSI

The Floriculture Sustainability Initiative, part of the Dutch Sustainable Trade Initiative (IDH), aims to ensure that flowers that cross borders are grown using good agricultural practices that include good labor conditions and minimize negative environmental impacts. Some 70 major buyers have endorsed the FSI, and about three-fourths of the cut flowers and indoor potted plants that were traded in 2020 had FSI-certification.

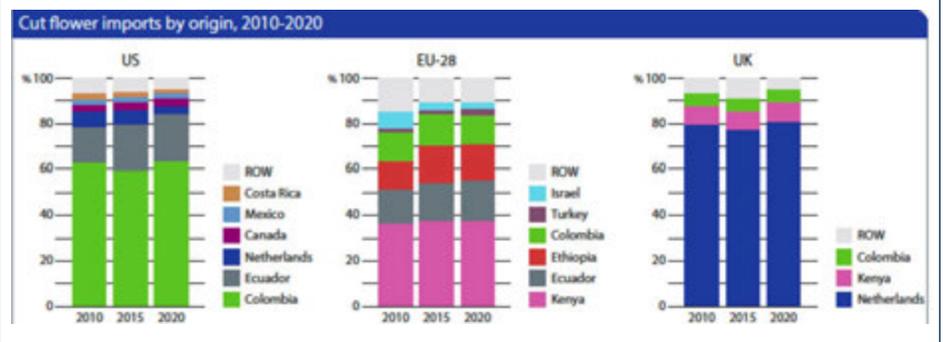
Women are three-fourths of the workers employed on Kenyan flower farms, and fill most of the lowest-level positions. Some report sexual harassment from male supervisors; NGOs urge flower exporters to have more female managers. Many of the workers in the Lake Naivasha basin migrate from elsewhere in Kenya, and are sometimes exploited by labor contractors and housed in substandard facilities. Environmental groups, who say that each rose requires 10 liters of water, complain that water extracted from Lake Naivasha is reducing the water available for the cattle herded by the Maasai peoples.

Floriculture encompasses more than cut flowers. Bulbs, indoor and outdoor plants, and nursery trees are also key elements of the floriculture industry. The value of bulbs, cut flowers, and potted indoor plants is over \$80 billion a year, and the value of outdoor nursery plants and trees is \$45 billion a year.

The Three Major Cut Flowers are Roses, Chrysanthemums, and Carnations

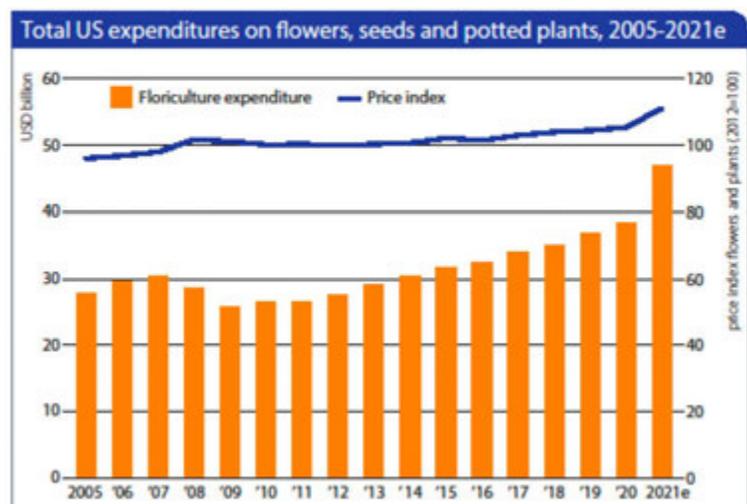


Colombia Supplies 60% of U.S. Cut Flower Imports, and Kenya 40% of Europe Cut Flower Imports

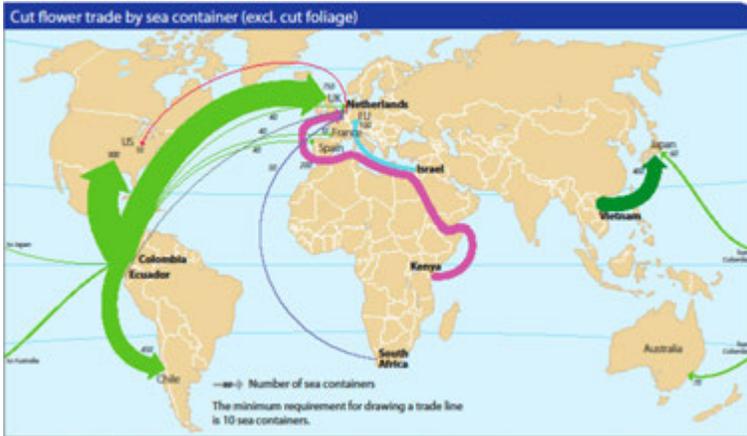


U.S. Floriculture Sales Jumped Over 20% Between 2020 and 2021 to Almost \$50 Billion

Figure 3: Total US expenditures on flowers, seeds and potted plants, 2005-2021e



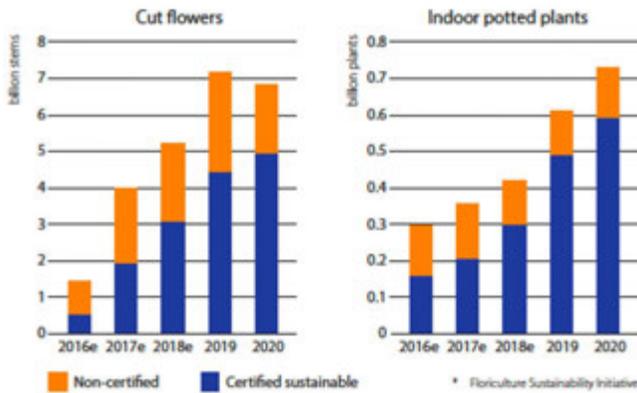
More Flowers are Being Shipped from Colombia and Ecuador to the U.S. by Sea



FSI Certified $\frac{3}{4}$ of Traded Cut Flowers and Indoor Potted Plants in 2020

Sustainable cut flowers and indoor potted plants traded by FSI* members

The total volume sustainably sourced stems and plants by FSI in 2020: 5.6 billion



Cut Flowers and Indoor Plants are More Valuable than Nursery Plants and Trees

Global floriculture production estimate:
USD 80bn at farmgate level on approximately 650,000 ha



Cut flowers and cut foliage



Propagation materials
(including bulbs)



Potted plants: flowering
and foliage potted plants

Global nursery production estimate:
USD 45bn at farmgate level on approximately 1,110,000 ha



Bedding plants: annual
and perennial garden plants



Tree nursery: trees, shrubs,
vines and other perennial
woody plants

References

Rabobank. 2022. A Mixed Bouquet of Developments in Floriculture: World Floriculture Map 2021. <https://research.rabobank.com/far/en/sectors/fresh-produce/a-mixed-bouquet-of-developments-in-floriculture-world-floriculture-map-2021.html>

World Bank. 2005. The European Horticulture Market. <https://documents1.worldbank.org/curated/en/566431467990016721/pdf/340510rev.pdf>

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