

FLORIDATA MARKET REPORT UNITED KINGDOM

Period 2016-2020

- The United Kingdom is the 2nd export country for the Netherlands
- Floridata monitors 14,736 debtors in the United Kingdom
- Export growth cut flowers, period 2016-2020: **-7.4%**
- Export growth pot and garden plants, period 2016-2020: **+21.3%**



Edition: September 2021

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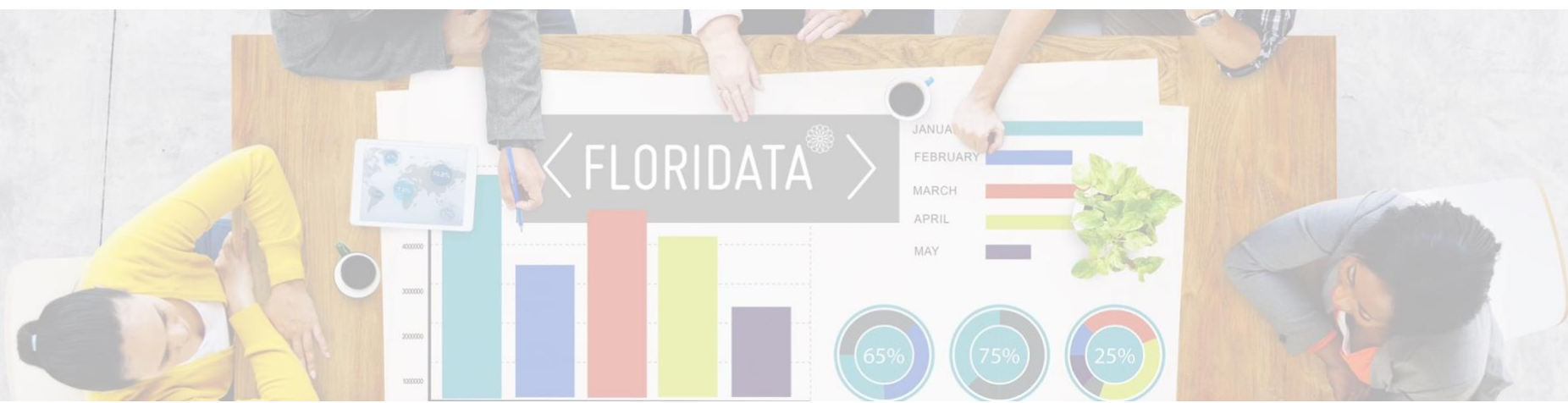
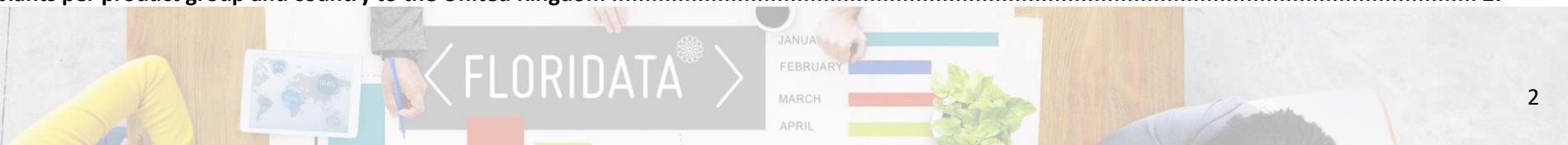


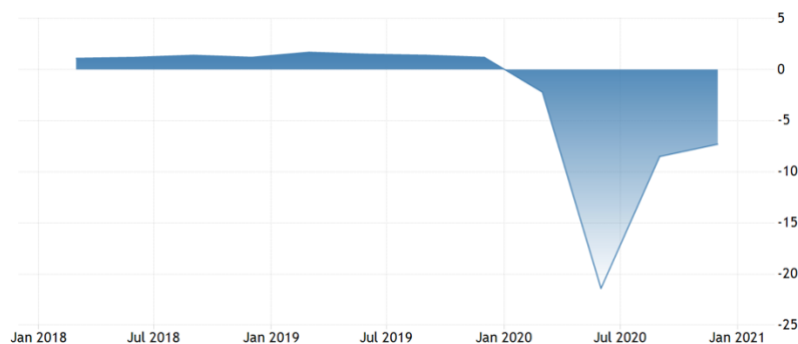
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Economical & demographical developments 2018 – 2020

Economic growth – (based on GDP)



SOURCE: TRADINGECONOMICS.COM | OFFICE FOR NATIONAL STATISTICS

Demographics

	2018	2019	2020
Population (mln.)	66,27	66,65	65,76
Gross Domestic Product (bln.)	\$2666	\$2861	\$2708
Unemployment rate	4,7%	4,3%	5,0%

Population density

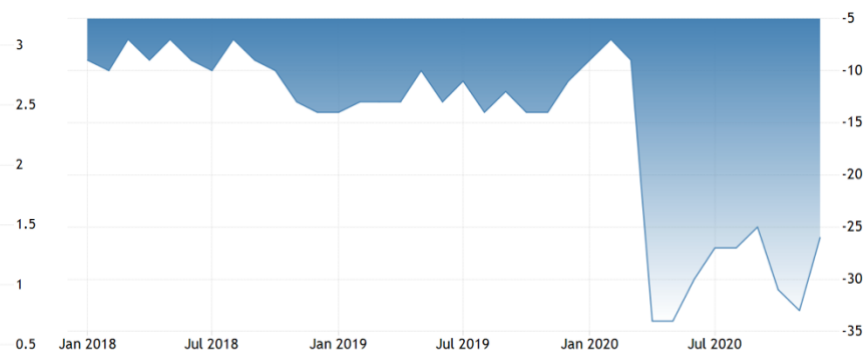


Inflation



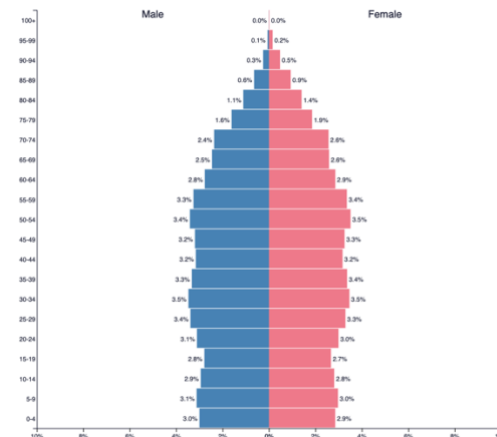
SOURCE: TRADINGECONOMICS.COM | OFFICE FOR NATIONAL STATISTICS

Consumer confidence



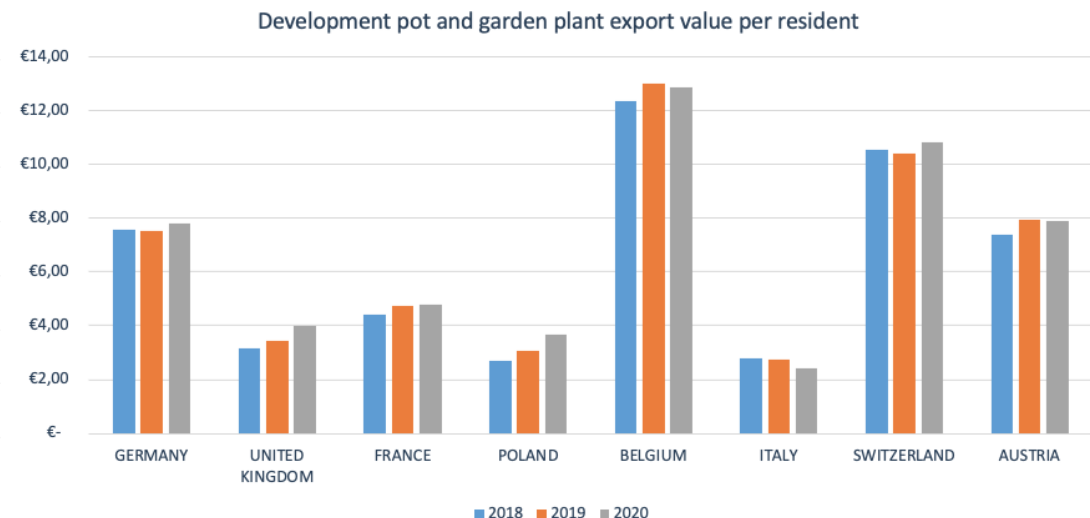
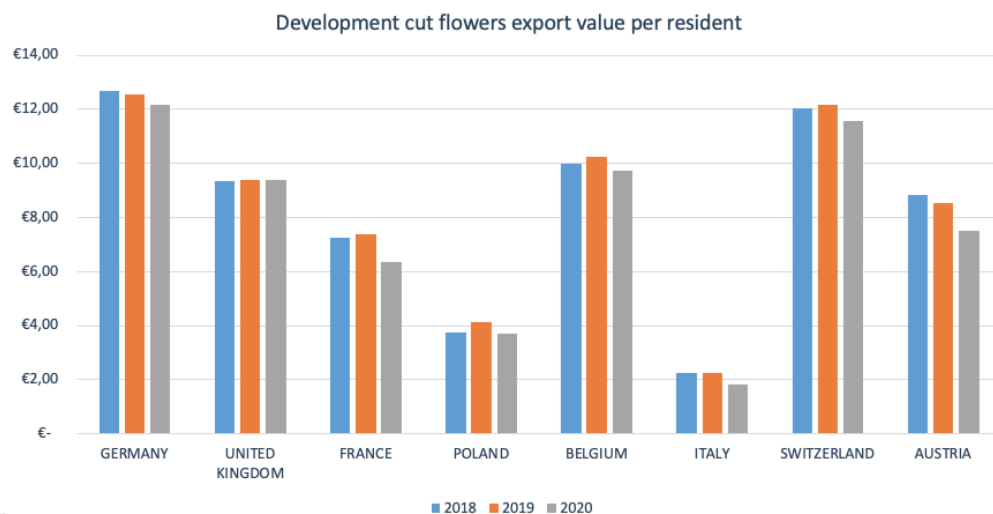
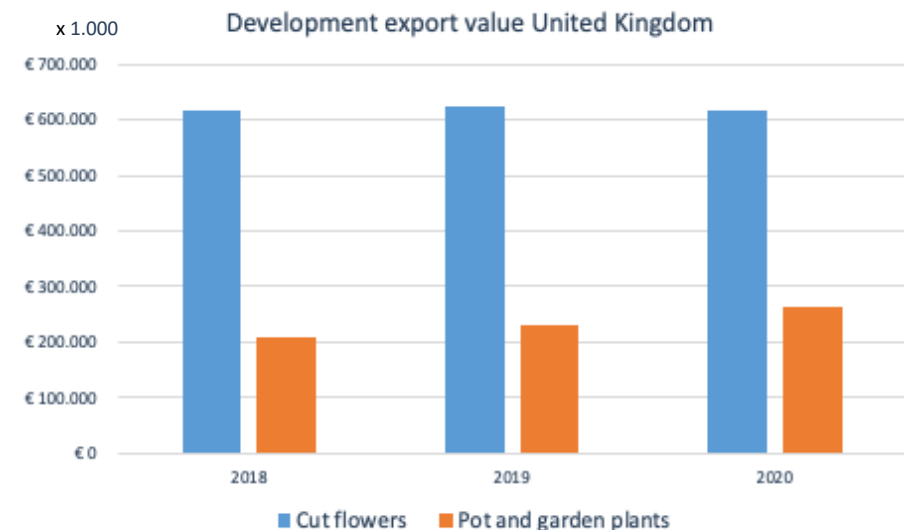
SOURCE: TRADINGECONOMICS.COM | GFK GROUP

Age distribution

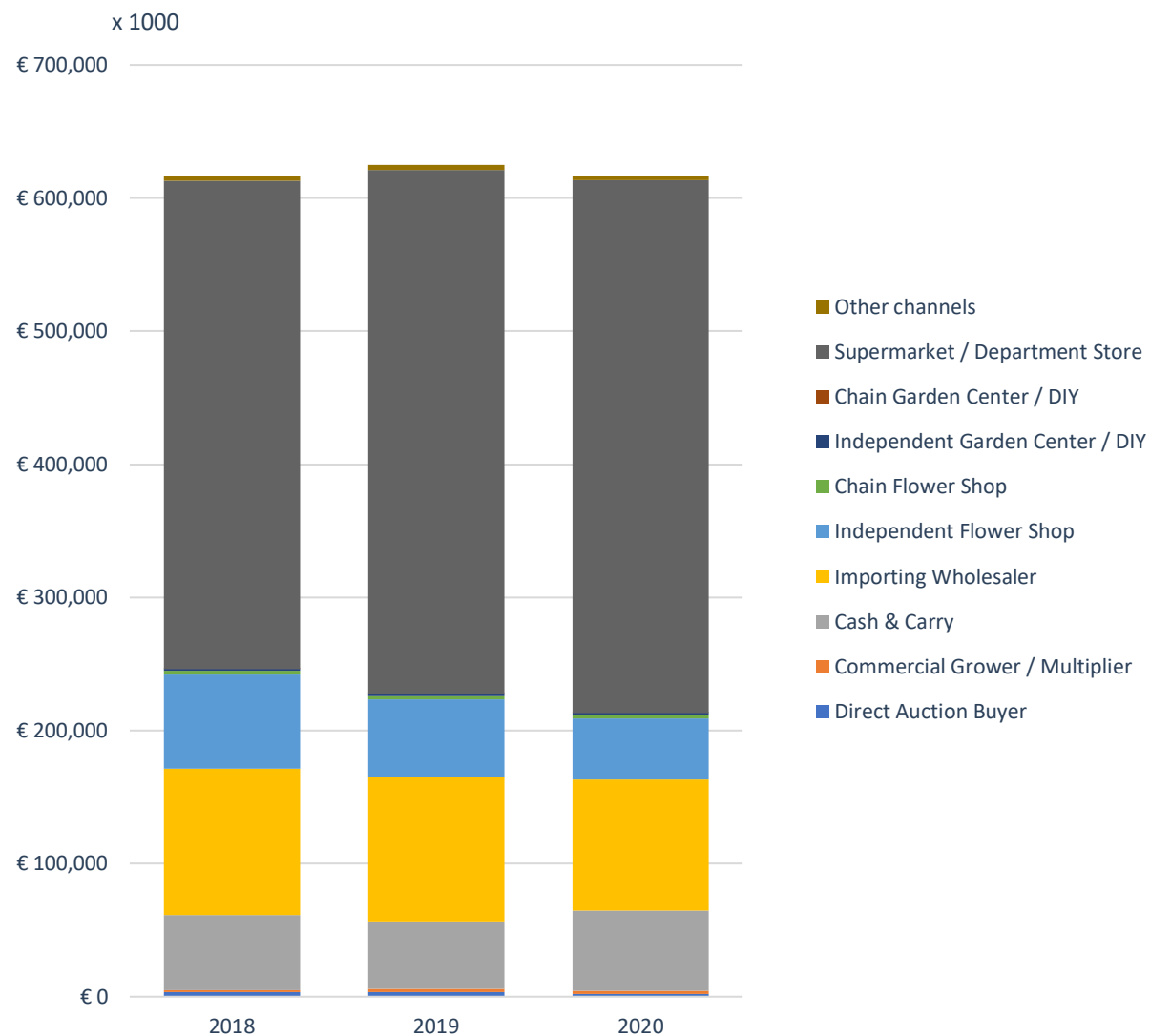


Developments total export value to the United Kingdom compared to other countries

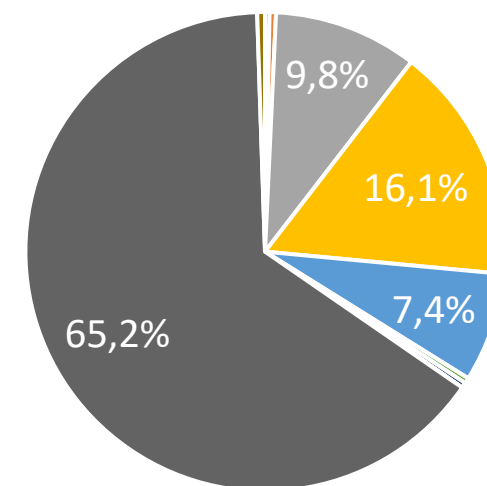
Rank	TOP 18 EXPORT COUNTRIES	TOTAL EXPORT VALUE CUT FLOWERS & POT AND GARDEN PLANTS (x1.000)					
		2015	2016	2017	2018	2019	2020
1	GERMANY	€ 1.557.205	€ 1.660.516	€ 1.727.401	€ 1.675.531	€ 1.666.266	€ 1.602.785
2	UNITED KINGDOM	€ 925.133	€ 883.065	€ 836.684	€ 825.962	€ 854.835	€ 879.863
3	FRANCE	€ 752.975	€ 776.733	€ 785.231	€ 782.384	€ 813.445	€ 756.611
4	POLAND	€ 173.666	€ 188.495	€ 230.288	€ 244.932	€ 274.182	€ 283.556
5	BELGIUM	€ 231.986	€ 256.404	€ 263.456	€ 254.735	€ 266.693	€ 265.225
6	ITALY	€ 304.181	€ 311.009	€ 319.937	€ 303.538	€ 301.474	€ 264.217
7	SWITZERLAND	€ 182.325	€ 185.217	€ 190.918	€ 191.909	€ 192.757	€ 187.939
8	RUSSIA	€ 169.097	€ 119.020	€ 165.409	€ 196.710	€ 226.858	€ 178.536
9	SWEDEN	€ 175.972	€ 180.241	€ 178.589	€ 171.276	€ 171.429	€ 175.622
10	DENMARK	€ 113.007	€ 125.812	€ 114.925	€ 115.879	€ 129.799	€ 151.730
11	AUSTRIA	€ 129.640	€ 132.524	€ 138.452	€ 142.889	€ 145.703	€ 136.753
12	CZECH REPUBLIC	€ 81.836	€ 88.528	€ 107.915	€ 115.730	€ 120.881	€ 126.361
13	SPAIN	€ 75.388	€ 85.553	€ 90.048	€ 91.912	€ 102.616	€ 96.831
14	UNITED STATES OF AMERICA	€ 88.029	€ 98.855	€ 98.275	€ 91.121	€ 108.112	€ 79.986
15	FINLAND	€ 57.123	€ 57.796	€ 62.770	€ 63.657	€ 69.063	€ 75.476
16	NORWAY	€ 74.970	€ 64.777	€ 70.472	€ 68.304	€ 72.301	€ 74.335
17	HUNGARY		€ 57.734	€ 60.110	€ 70.308	€ 79.055	€ 73.841
18	ROMANIA		€ 43.557	€ 53.122	€ 63.304	€ 74.746	€ 65.212
	OTHERS	€ 484.476	€ 526.794	€ 634.463	€ 665.241	€ 718.960	€ 638.865
	TOTAL	€ 5.577.009	€ 5.741.339	€ 6.015.233	€ 6.001.710	€ 6.235.374	€ 5.974.691



Cut flowers export value to the United Kingdom per sales channel in 2018 – 2020



Sales channels the United Kingdom cut flowers 2020

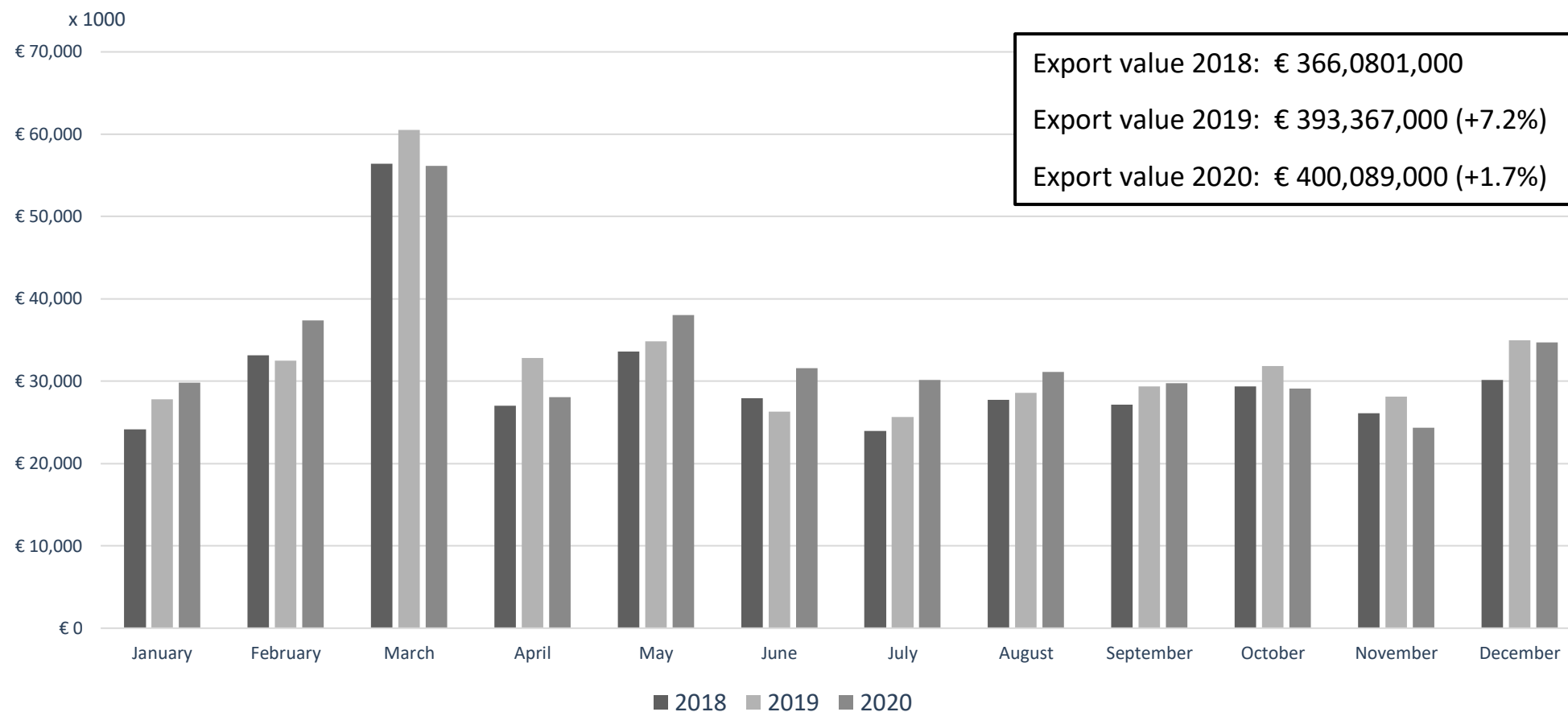


The four largest sales channels for the export of cut flowers are:

1. Supermarket/Department Store (65.2%)
2. Importing Wholesaler (16.1%)
3. Cash & Carry (9.8%)
4. Independent Flower Shop (7.4%)



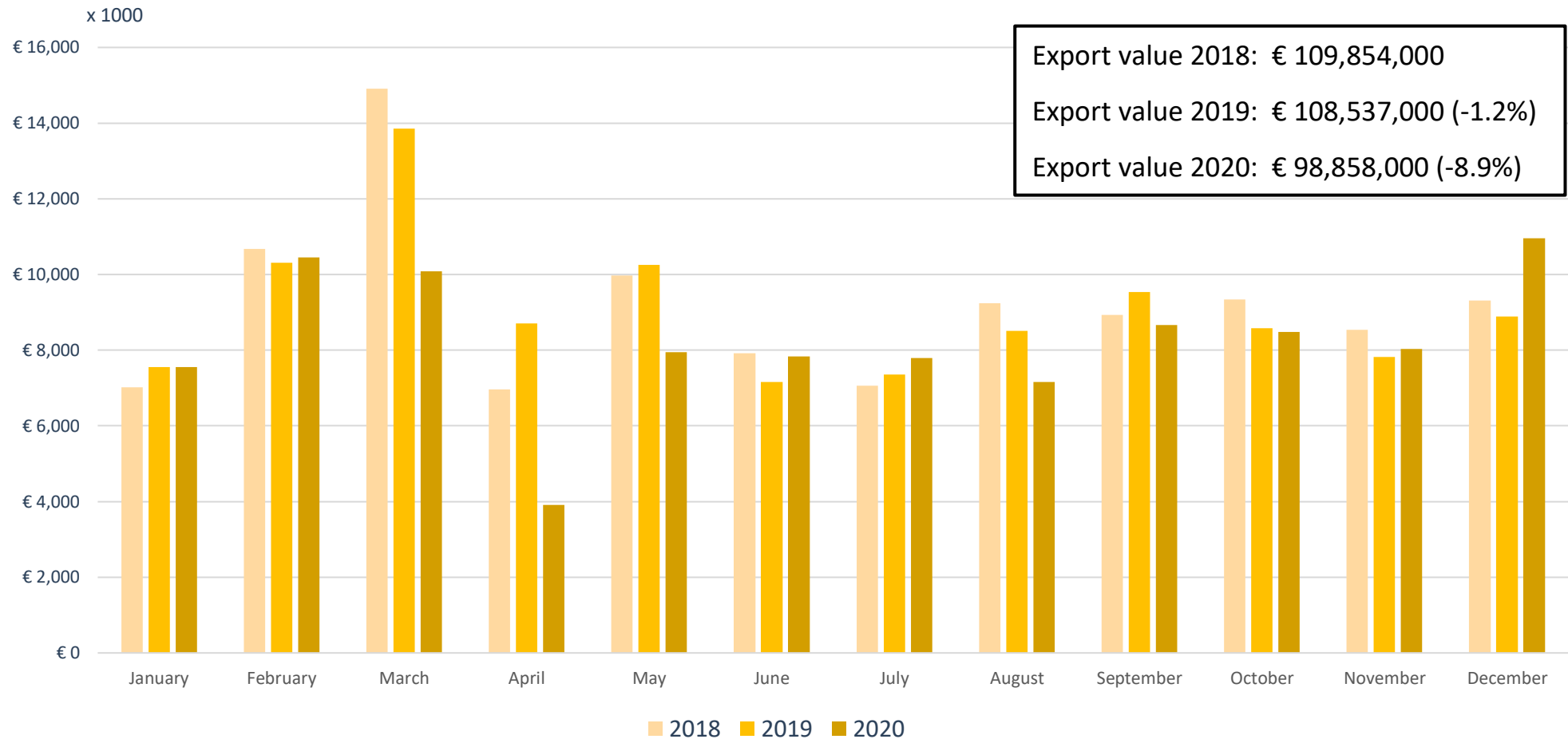
Largest sales channel for cut flowers: Supermarket / Department Store



The export value of cut flowers to Supermarket / Department Store increased with 9.2% between 2018 and 2020. In 2019 the export value increased with 7.2% and in 2020 it increased with 1.7%. March is the most important month for the export.



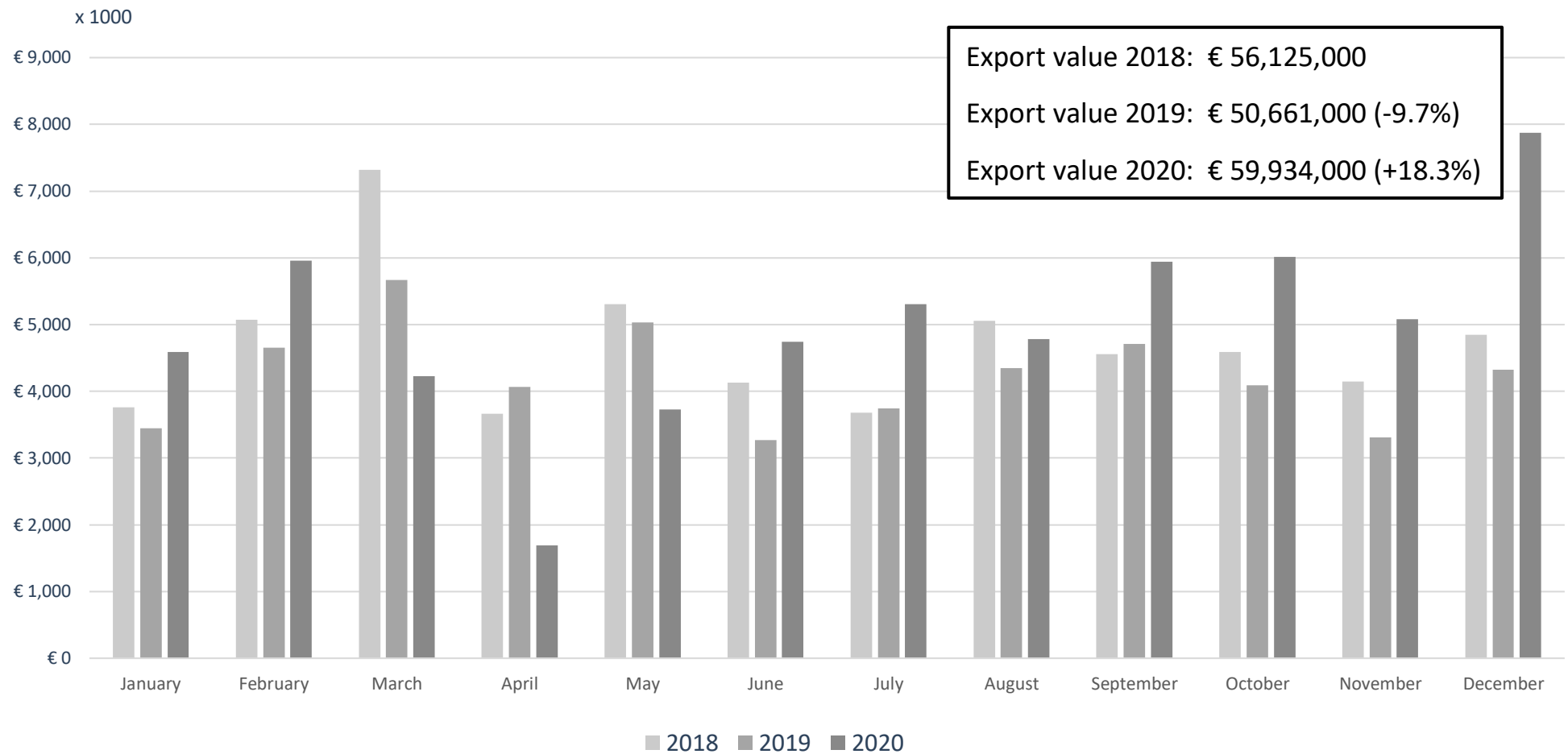
Second largest sales channel for cut flowers: Importing Wholesaler



The export value of cut flowers to Importing Wholesaler decreased with 10.0% between 2018 and 2020. In 2019 the export value decreased with 1.2% and in 2020 the export value decreased with 8.9%.



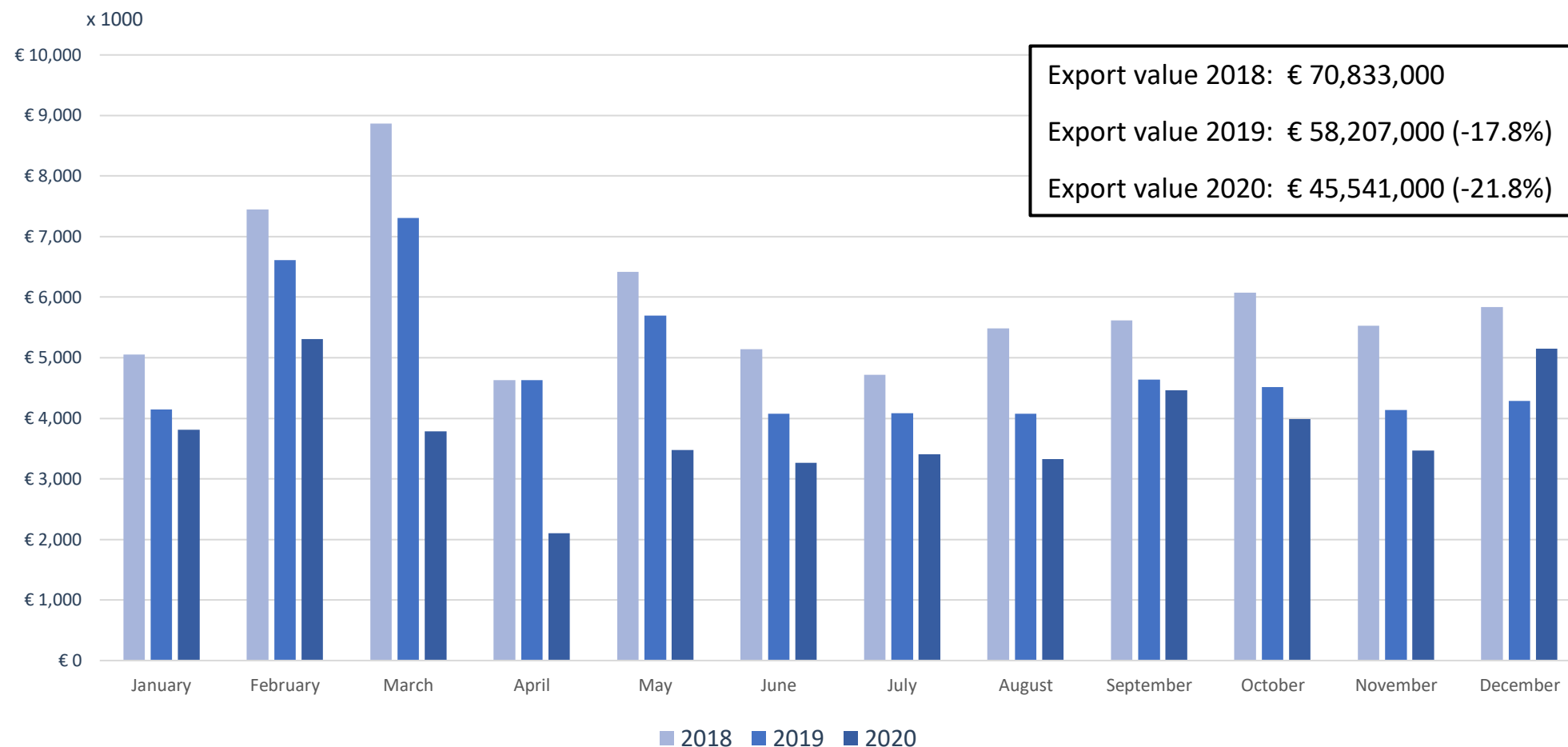
Third largest sales channel for cut flowers: Cash & Carry



The export value of cut flowers to Cash & Carry increased with 6.8% between 2018 and 2020.
In 2019 the export value decreased with 9.7% and in 2020 the export value increased with 18.3%.



Fourth largest sales channel for cut flowers: Independent Flower Shop



The export value of cut flowers to Independent Flower Shop decreased with 35.7% between 2018 and 2020. In 2019 the export value decreased with 17.8% and in 2020 the export value decreased with 21.8%.



Dutch export position cut flowers the United Kingdom

Development Dutch import share cut flowers UNITED KINGDOM

	2015	2016	2017	2018	2019	2020
	77,3%	79,8%	80,5%	79,8%	79,7%	82,2%

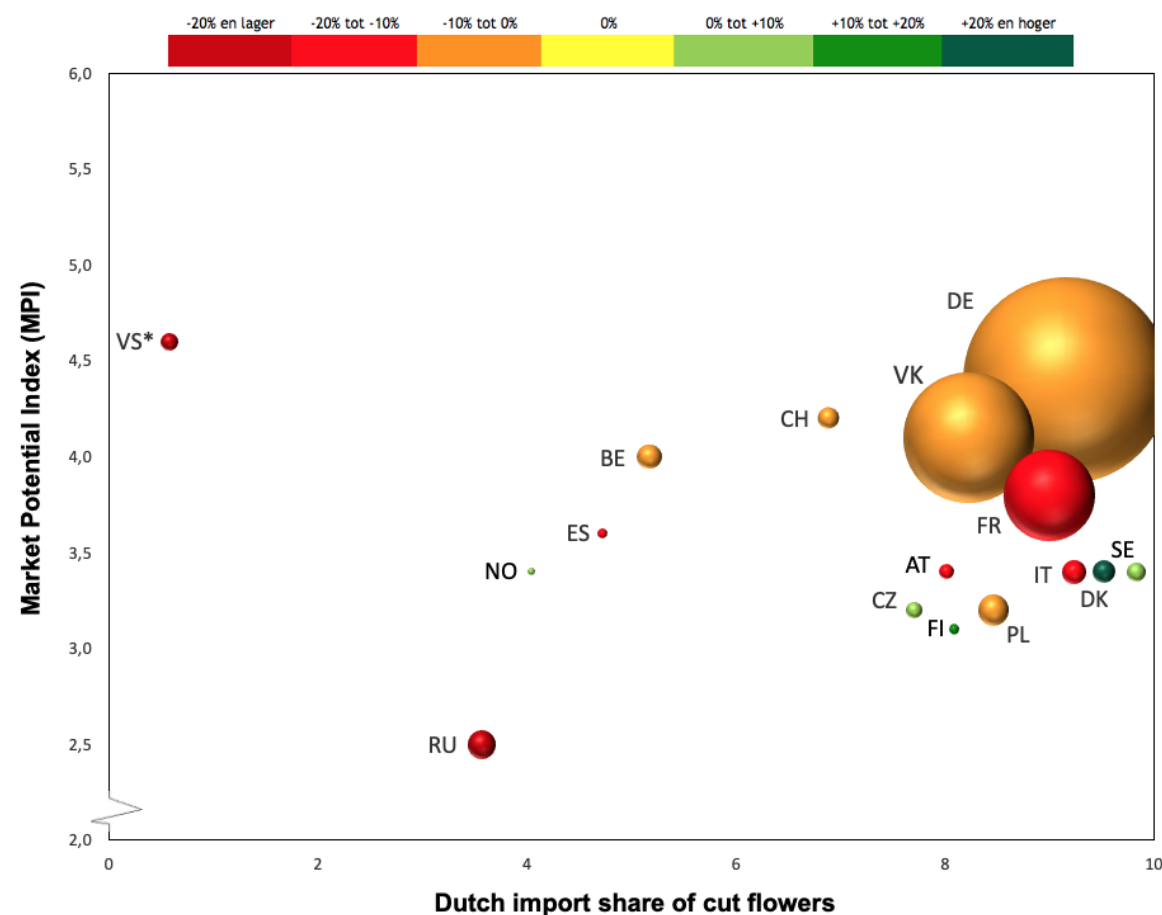
The **vertical axis** illustrates the height of the **market potential**. The higher the globe is positioned in the matrix, the higher country's market potential for international business. The market potential is determined with weighted scores in different dimensions, such as market size, -intensity, -growth, -consumption, commercial infrastructure, economical freedom and country's risk. The MPI-value for the United States is not available and therefore being estimated (source: Market Potential Index (MPI), developed by Global Edge).

On the **horizontal axis** the **Dutch export position** of the concerning country is shown. The Dutch import share is expressed in a value between 0 and 10. Meaning, the further the globe is positioned on the right, the larger the total import share of the Dutch cut flowers and pot and garden plants (source: Floridata export figures and UN Comtrade import data).

The **size of the globe** illustrates the **Dutch export value** to the concerning country, measured against the total Dutch export to all top 16 countries. Meaning, the larger the globe, the larger the export share of the concerning country is from the total export value to all top 16 countries (source: Floridata export figures).

The **colour of the globe** shows the **growth or decline of the export value** (source: Floridata export figures).

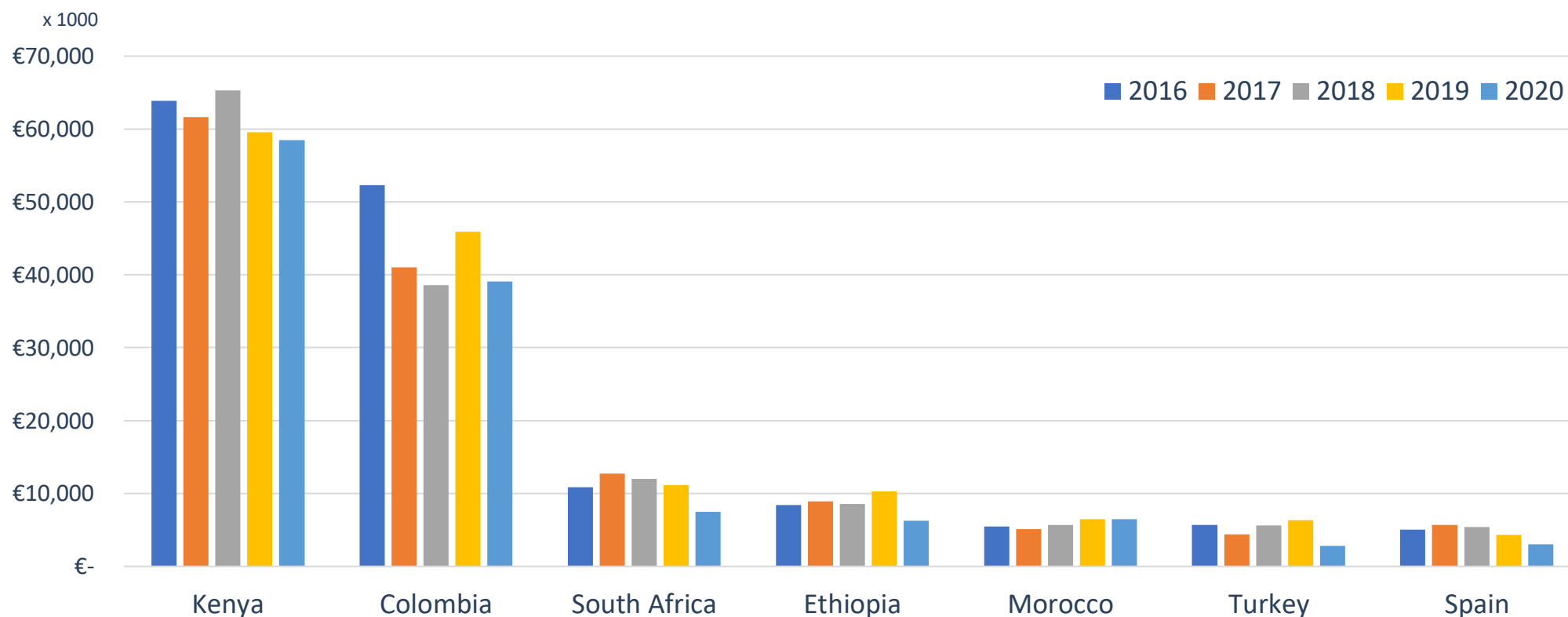
Market potential-Export position Matrix 2020



Source: UN Comtrade and Floridata



Import value cut flowers the United Kingdom from other countries

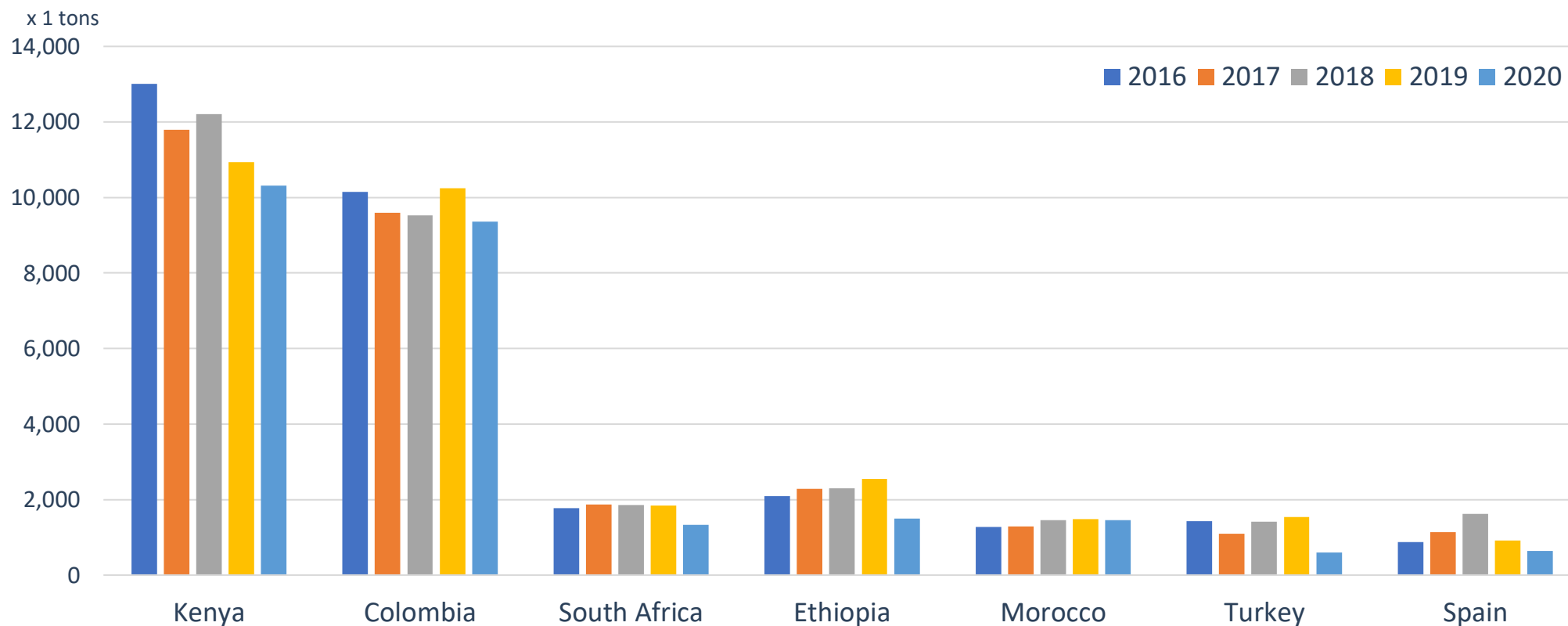


Source: UN Comtrade

The import value of cut flowers from Kenya decreased with 10.5% between 2018 and 2020. Kenya is the largest import country after the Netherlands. The import value of cut flowers from both Colombia and Morocco increased between 2018 and 2020.



Import volume cut flowers the United Kingdom from other countries

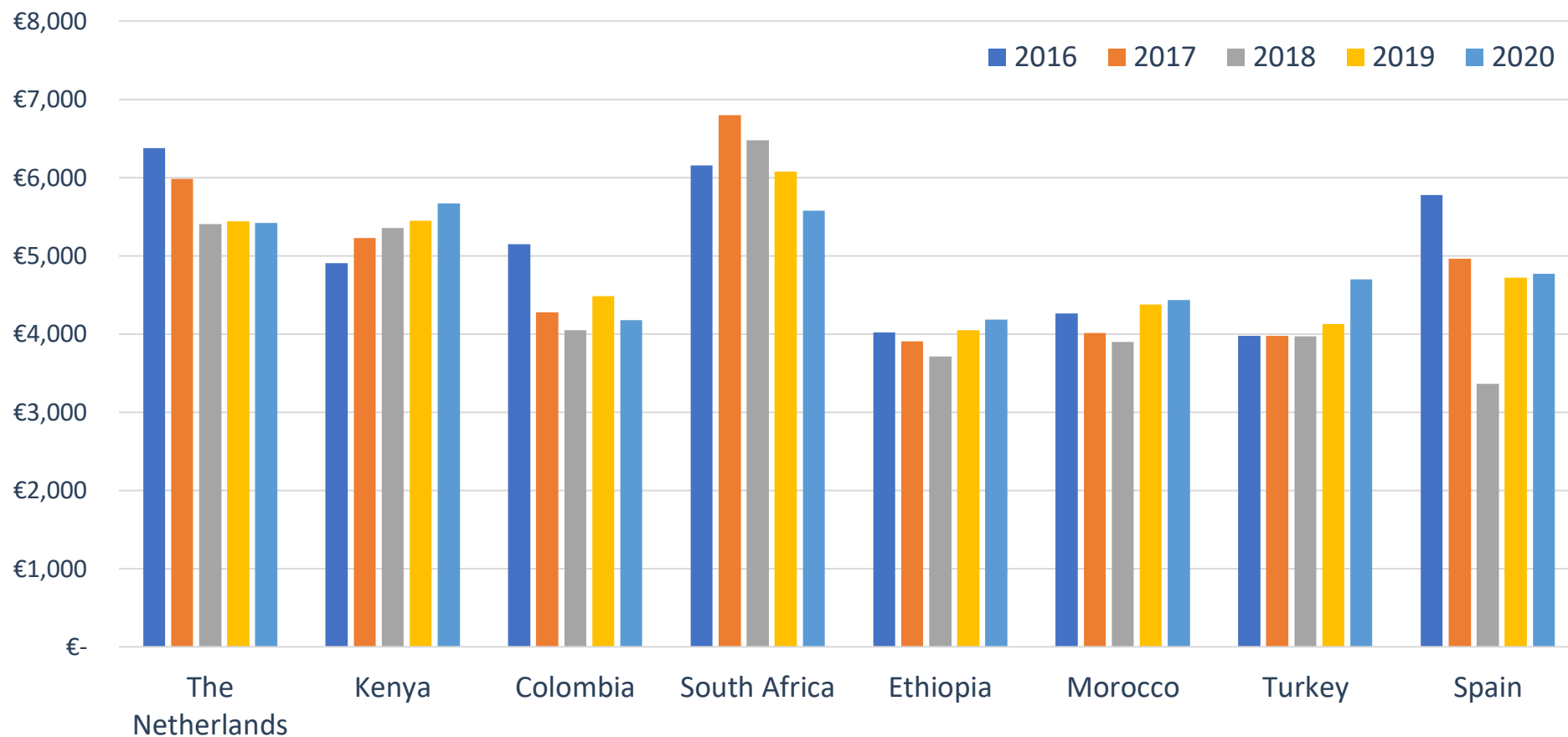


Source: UN Comtrade

The import volume of cut flowers from Kenya decreased with 15.5% between 2018 and 2020. The import volume of cut flowers from Colombia decreased with 1.7% over the same period.



Import value per ton cut flowers the United Kingdom



Source: UN Comtrade

The import value per ton cut flowers from the Netherlands increased with 0.3% between 2018 and 2020. For Kenya and Colombia the import value per ton cut flowers also increased over the same period.



Development cut flowers value import countries the United Kingdom

Cut flowers United Kingdom	Import value development	Import volume development	Value per ton development	Conclusion
	2016-2020	2016-2020	2016-2020	
The Netherlands	-25,6%	-12,4%	-15,1%	Decreasing import value & decreasing volume → decreasing value cut flowers.
Kenya	-8,4%	-20,8%	+15,6%	Decreasing import value & decreasing volume → increasing value cut flowers.
Colombia	-25,2%	-7,7%	-18,9%	Decreasing import value & decreasing volume → decreasing value cut flowers.
South Africa	-31,6%	-24,5%	-9,3%	Decreasing import value & decreasing volume → decreasing value cut flowers.
Ethiopia	-25,5%	-28,4%	+4,0%	Decreasing import value & decreasing volume → increasing value cut flowers.
Morocco	+18,3%	+13,8%	+3,9%	Increasing import value & increasing volume → increasing value cut flowers.
Turkey	-50,3%	-57,9%	+18,2%	Decreasing import value & decreasing volume → increasing value cut flowers.
Spain	-39,4%	-26,6%	-17,4%	Decreasing import value & decreasing volume → decreasing value cut flowers.

Source: UN Comtrade and Floridata

The value of cut flowers from the Netherlands, Kenya and Colombia and Ethiopia decreased between 2016-2020. The value of cut flowers from Ethiopia, Morocco and Turkey increased over the same period.



Development cut flowers per product group and country to the United Kingdom FLORIDATA[®]

Dutch import cut flowers per product group to United Kingdom	Share of Dutch import value per product group to United Kingdom (source: ITC calculations based on UN Comtrade Statistics)				
	2016	2017	2018	2019	2020
Cut flower others	41,9%	43,3%	41,1%	39,4%	38,5%
Chrysanthemums	16,3%	15,0%	15,5%	17,3%	18,0%
Roses	15,2%	15,6%	15,4%	15,5%	15,1%
Lilies	13,3%	12,7%	13,1%	12,1%	12,8%
Foliage	4,0%	3,9%	5,9%	5,8%	6,0%
Dried/bleached/impregnated	4,1%	4,6%	4,3%	6,6%	5,1%
Carnations	3,2%	2,7%	2,4%	2,0%	3,5%
Orchids	2,0%	2,2%	2,2%	1,3%	1,0%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

Dutch import value per product group to United Kingdom (source: Floridata & ITC calculations based on UN Comtrade Statistics)					
2016	2017	2018	2019	2020	2016-2020
€ 279.271	€ 272.337	€ 253.527	€ 246.148	€ 237.212	-15,1%
€ 108.256	€ 94.387	€ 95.484	€ 108.192	€ 111.087	+2,6%
€ 101.048	€ 98.271	€ 95.017	€ 96.996	€ 93.242	-7,7%
€ 88.686	€ 79.769	€ 80.971	€ 75.833	€ 78.861	-11,1%
€ 26.517	€ 24.500	€ 36.688	€ 35.987	€ 37.025	+39,6%
€ 27.430	€ 28.939	€ 26.767	€ 41.397	€ 31.661	+15,4%
€ 21.196	€ 16.793	€ 15.019	€ 12.298	€ 21.279	+0,4%
€ 13.640	€ 14.111	€ 13.391	€ 8.023	€ 6.338	-53,5%
€ 666.044	€ 629.108	€ 616.863	€ 624.874	€ 616.705	-7,4%

The value of cut flowers others, roses and lilies decreased between 2016-2020.

The value of chrysanthemums, foliage and dried/bleached/impregnated increased over the same period.



Import of Chysanthemums United Kingdom	Share of import value Chysanthemums per country (source: ITC calculations based on UN Comtrade Statistics)				
	2016	2017	2018	2019	2020
Netherlands	80,6%	78,1%	77,9%	78,1%	80,8%
Colombia	11,6%	12,0%	12,9%	14,1%	13,7%
South Africa	7,2%	9,4%	8,5%	6,7%	4,5%
Others	0,5%	0,6%	0,8%	1,1%	1,0%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

Import value of Chysanthemums per country (source: Floridata & ITC calculations based on UN Comtrade Statistics)					
2016	2017	2018	2019	2020	2016-2020
€ 108.256	€ 94.387	€ 95.484	€ 108.192	€ 111.087	+2,6%
€ 15.633	€ 14.491	€ 15.762	€ 19.560	€ 18.762	+20,0%
€ 9.689	€ 11.324	€ 10.449	€ 9.227	€ 6.205	-36,0%
€ 695	€ 708	€ 948	€ 1.562	€ 1.374	+97,7%
€ 134.273	€ 120.910	€ 122.643	€ 138.541	€ 137.428	+2,3%

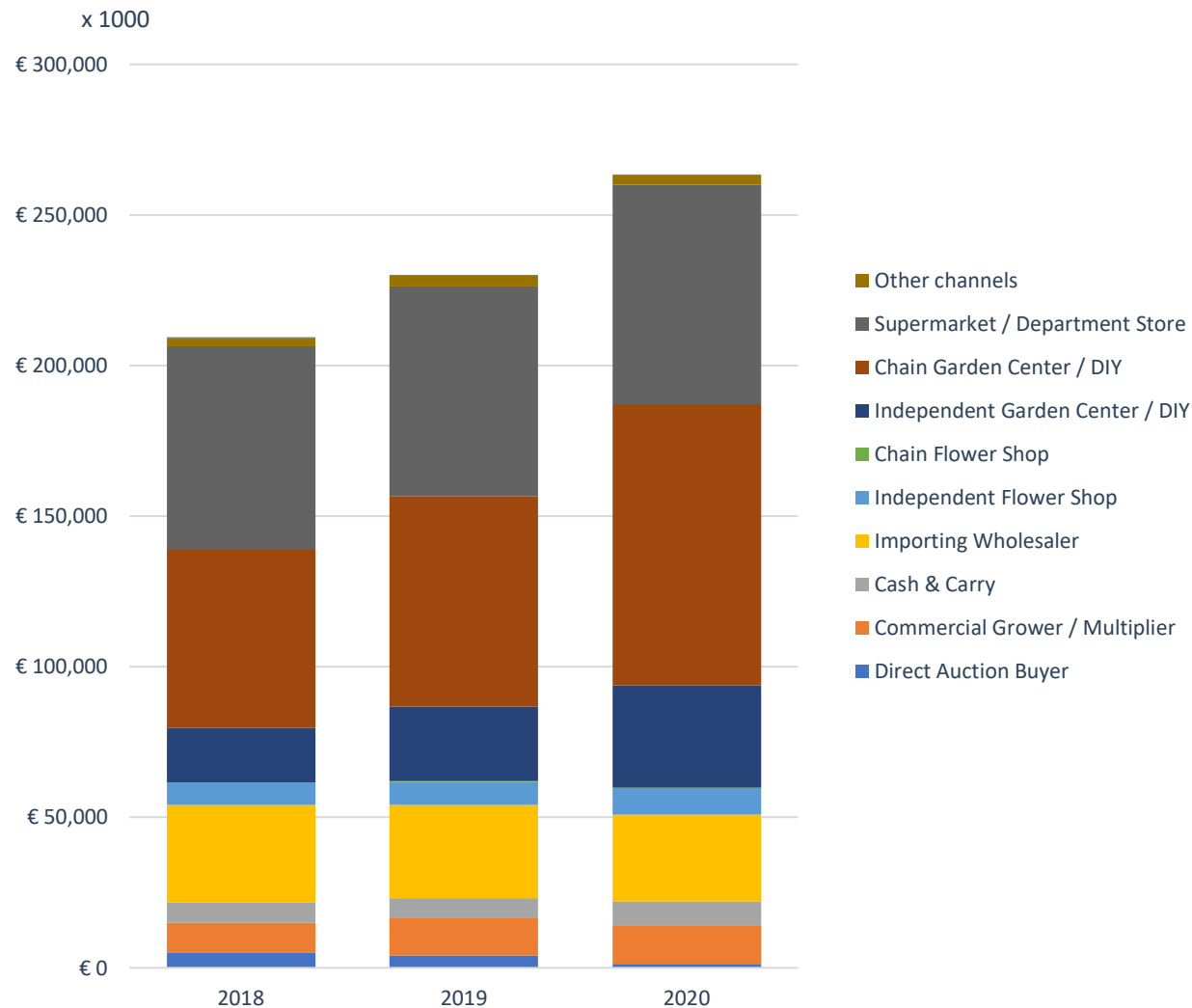
Import of roses United Kingdom	Share of import value roses per country (source: ITC calculations based on UN Comtrade Statistics)				
	2016	2017	2018	2019	2020
Netherlands	56,6%	57,7%	56,2%	58,2%	59,5%
Kenya	28,7%	29,9%	31,8%	28,9%	31,6%
Ethiopia	4,7%	5,1%	5,0%	6,1%	4,0%
Colombia	4,6%	3,1%	2,3%	2,5%	2,2%
Others	5,5%	4,2%	4,7%	4,2%	2,8%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

Import value of roses per country (source: Floridata & ITC calculations based on UN Comtrade Statistics)					
2016	2017	2018	2019	2020	2016-2020
€ 101.048	€ 98.271	€ 95.017	€ 96.996	€ 93.242	-7,7%
€ 51.144	€ 50.894	€ 53.836	€ 48.149	€ 49.531	-3,2%
€ 8.351	€ 8.696	€ 8.410	€ 10.147	€ 6.237	-25,3%
€ 8.175	€ 5.224	€ 3.943	€ 4.241	€ 3.372	-58,9%
€ 9.756	€ 7.230	€ 7.934	€ 7.001	€ 4.319	-55,7%
€ 178.474	€ 170.315	€ 169.140	€ 166.534	€ 156.701	-12,2%

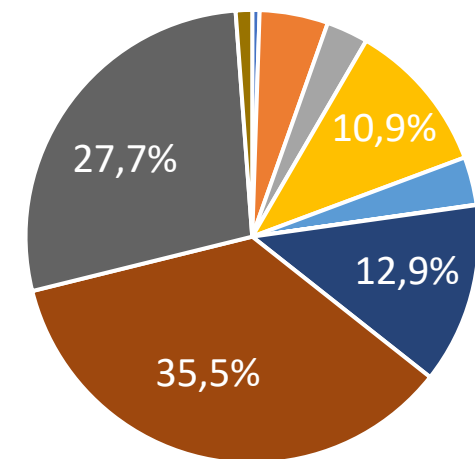
The value of chrysanthemums from Colombia increased with 20.0% between 2016-2020.
The value of roses from Kenya, Ethiopia and Colombia also decreased between 2016-2020.



Pot and garden plants export value to the United Kingdom per sales channel in 2018 – 2020



Sales channels United Kingdom pot and garden plants 2020

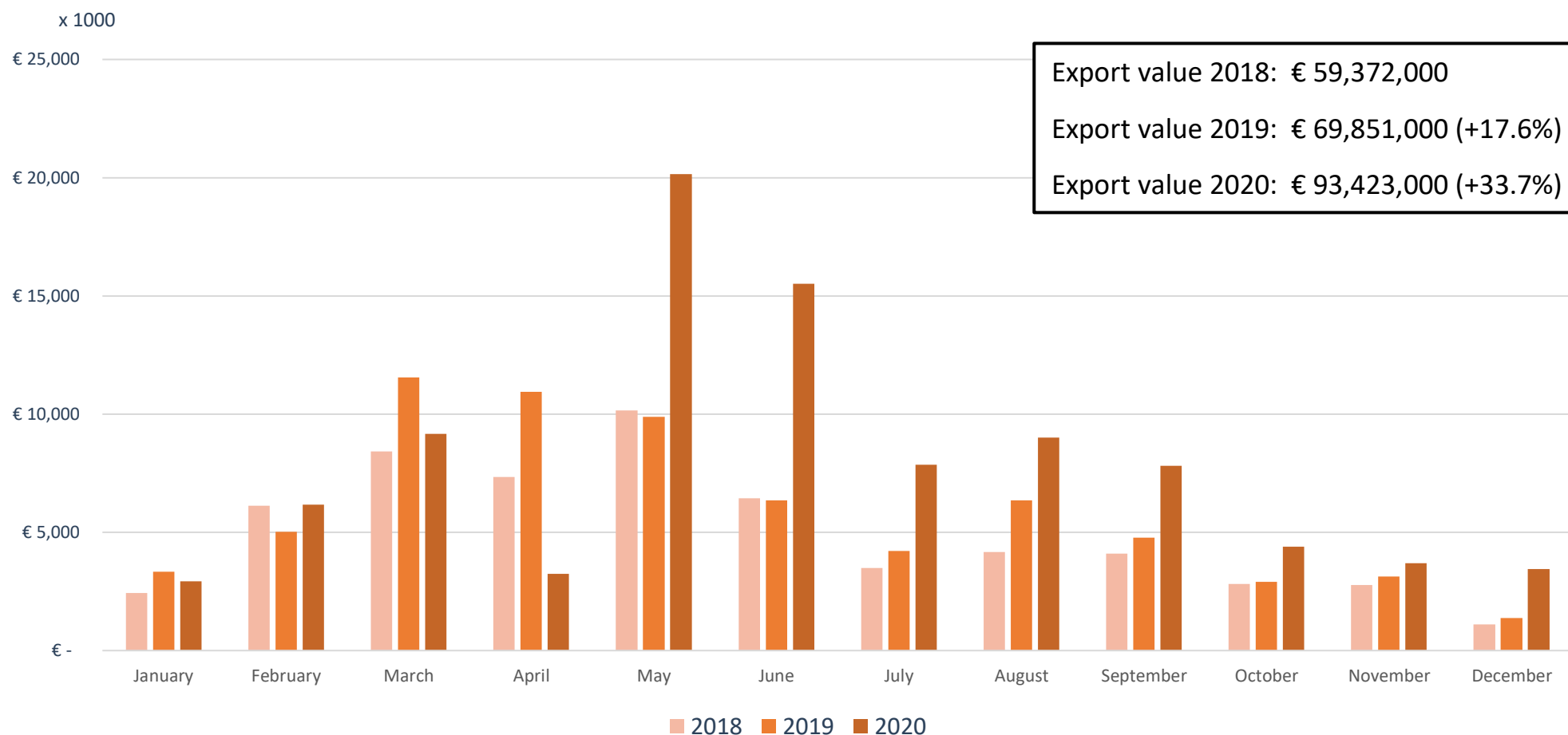


The four largest sales channels for the export of cut flowers are:

1. Chain Garden Center / DIY (35.5%)
2. Supermarket / Department Store (27.7%)
3. Independent Garden Center / DIY (12.9%)
4. Importing Wholesaler (10.9%)



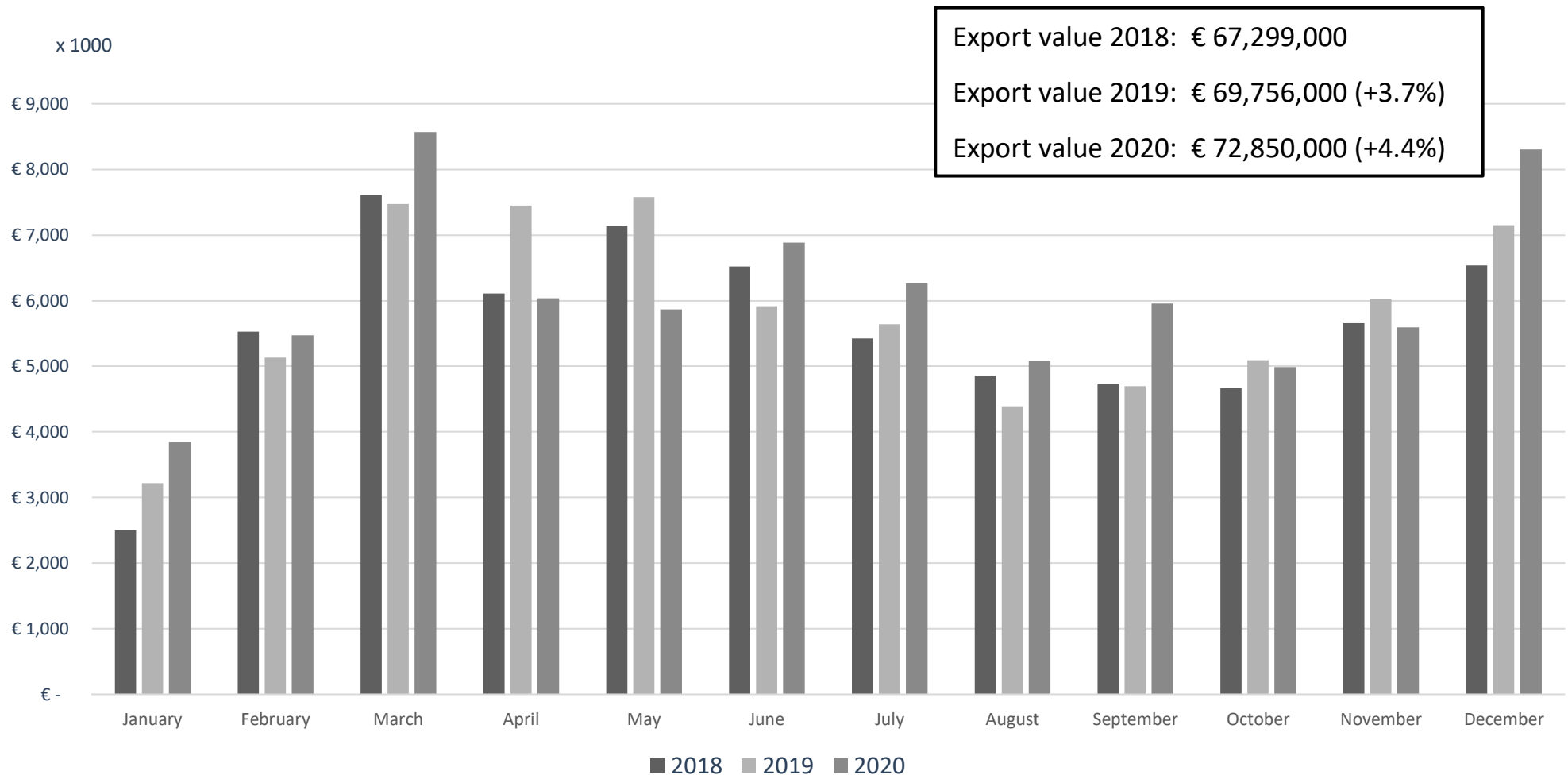
Largest sales channel for pot and garden plants: Chain Garden Center / DIY



The export value of pot and garden plants to Chain Garden Center / DIY increased between 2018 and 2020 with 57.4%. In 2019 the export value increased with 17.6% and in 2020 the export value increased with 33.7%.



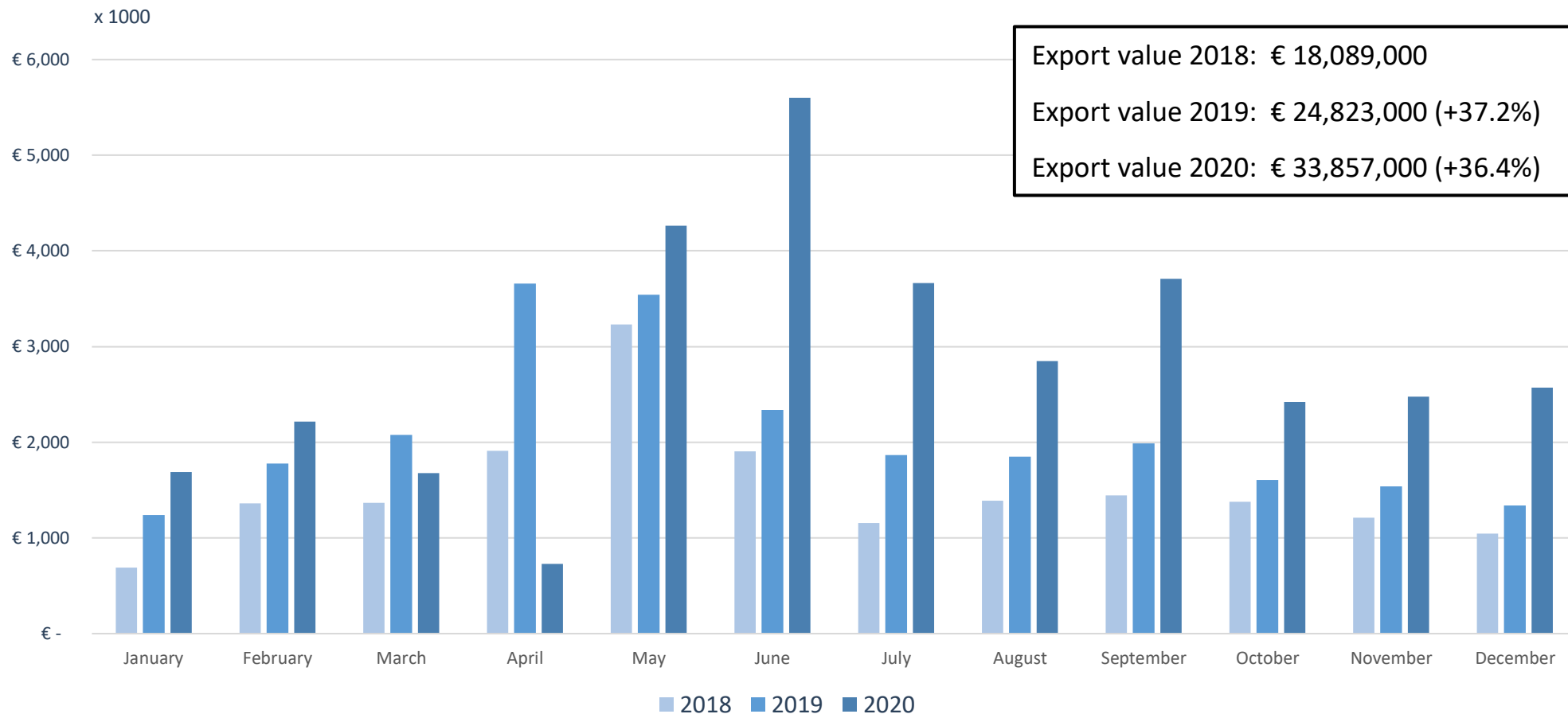
Second largest sales channel for pot and garden plants: Supermarket / Department Store



The export value of pot and garden plants to Supermarket / Department Store increased with 8.2% between 2018 and 2020. In 2019 the export value increased with 3.7% and in 2020 the export value increased with 4.4%.



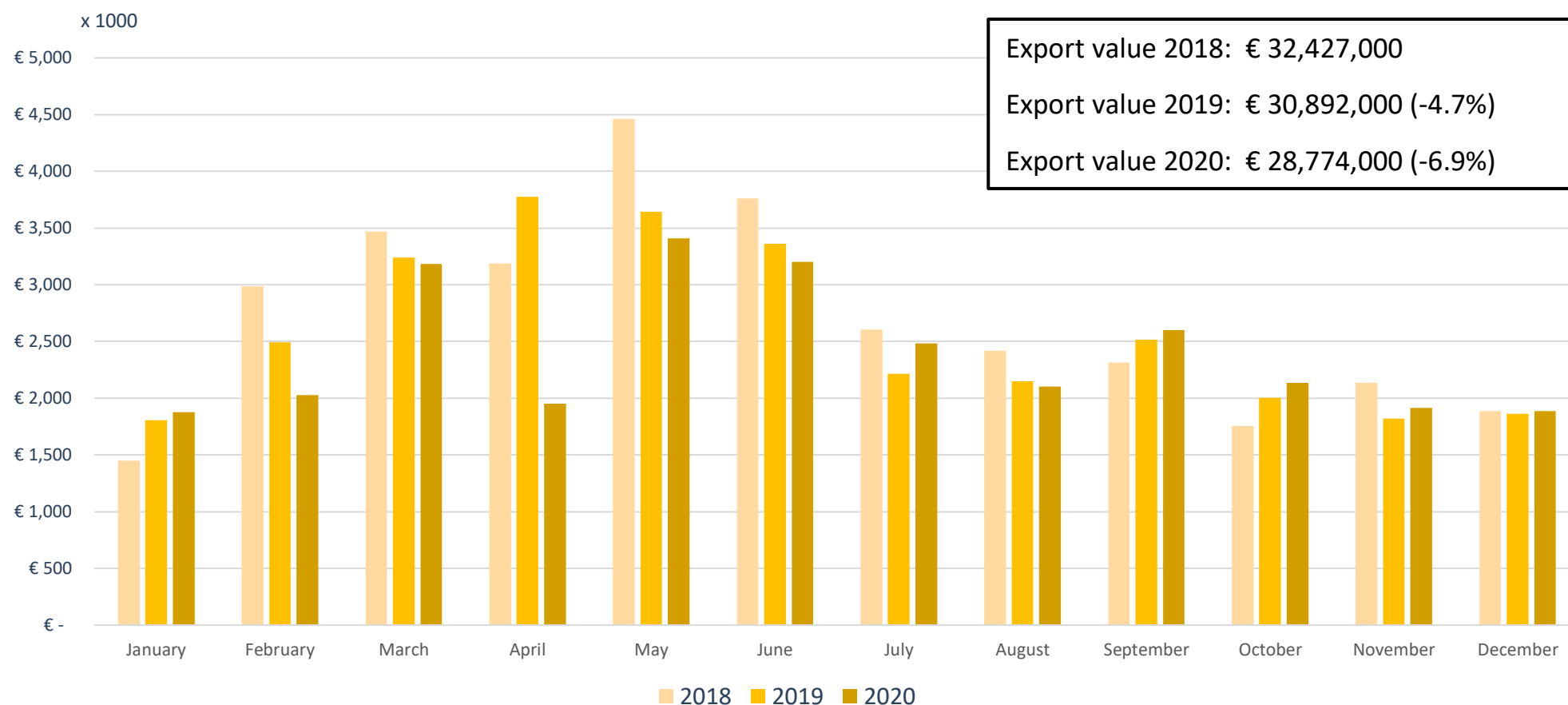
Third largest sales channel for pot and garden plants: Independent Garden Center / DIY



The export value of pot and garden plants to Independent Garden Center / DIY increased with 87.2% between 2018 and 2020. In 2019 the export value increased with 37.2% and in 2020 the export value increased with 36.4%.



Fourth largest sales channel for pot and garden plants: Importing Wholesaler



The export value of pot and garden plants to Importing Wholesaler decreased with 11.3% between 2018 and 2020. In 2019 the export value decreased with 4.7% and in 2020 the export value decreased with 6.9%.



Dutch export position pot and garden plants the United Kingdom

Development Dutch import share live plants

UNITED KINGDOM

2015	2016	2017	2018	2019	2020
64,7%	65,4%	63,3%	60,9%	61,0%	64,5%

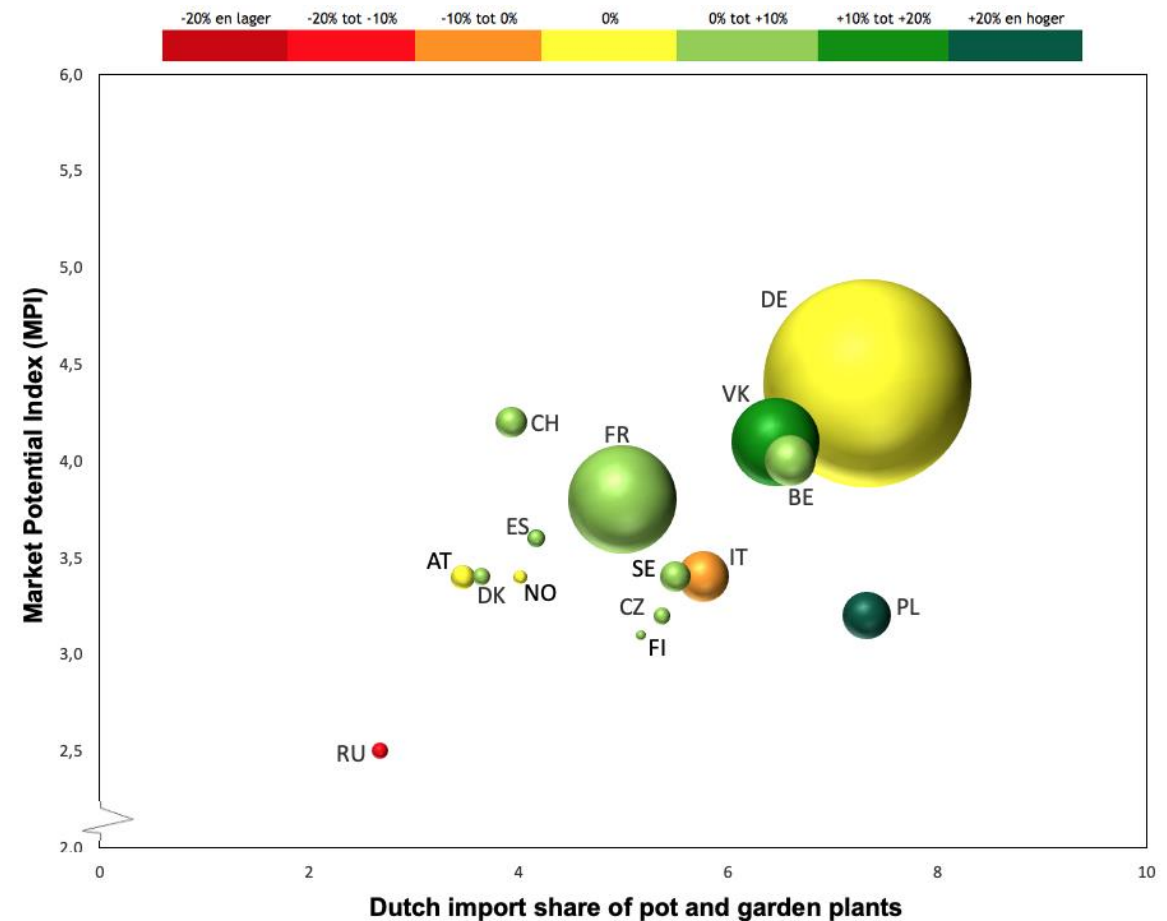
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On the **horizontal axis** the **Dutch export position** of the concerning country is shown. The Dutch import share is expressed in a value between 0 and 10. Meaning, the further the globe is positioned on the right, the larger the total import share of the Dutch cut flowers and pot and garden plants (source: Floridata export figures and UN Comtrade import data).

The **size of the globe** illustrates the **Dutch export value** to the concerning country, measured against the total Dutch export to all top 16 countries. Meaning, the larger the globe, the larger the export share of the concerning country is from the total export value to all top 16 countries (source: Floridata export figures).

The **colour of the globe** shows the **growth or decline of the export value** (source: Floridata export figures).

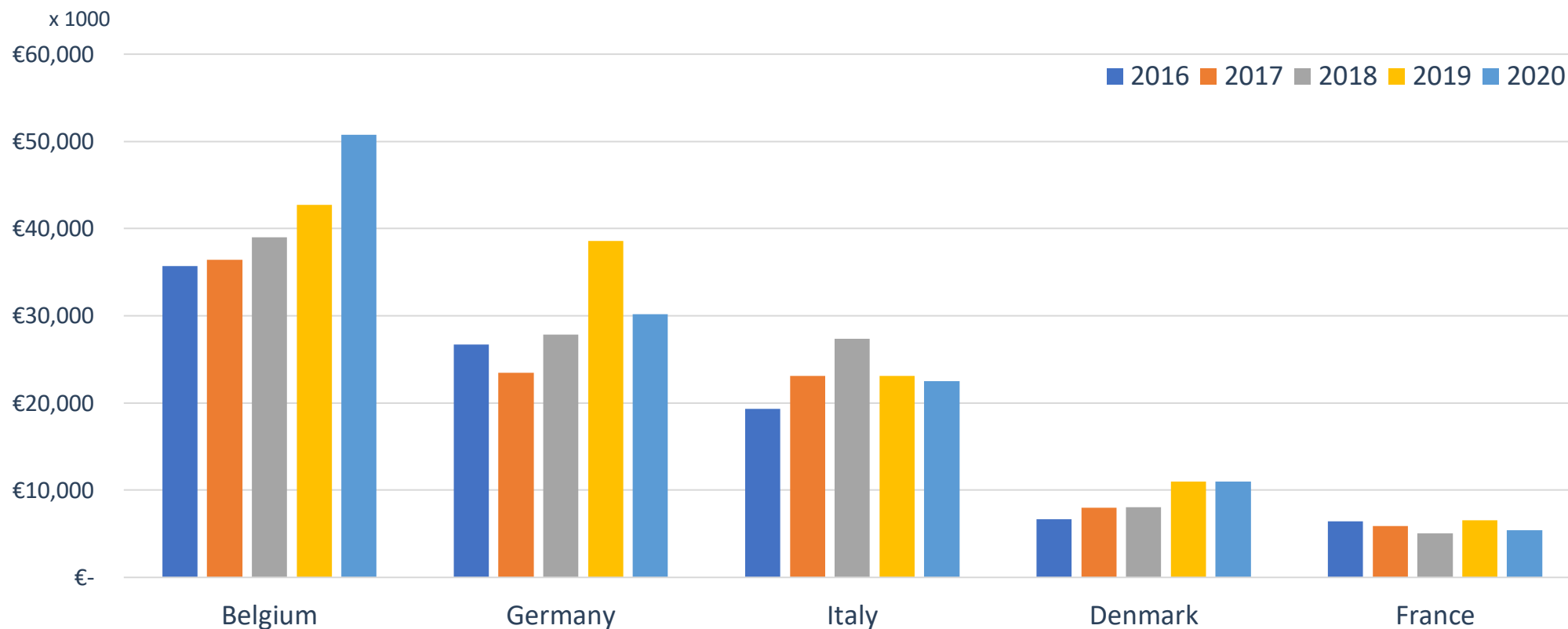
Market potential-Export position Matrix 2020



Source: UN Comtrade and Floridata



Import value live plants the United Kingdom from other countries



Source: UN Comtrade

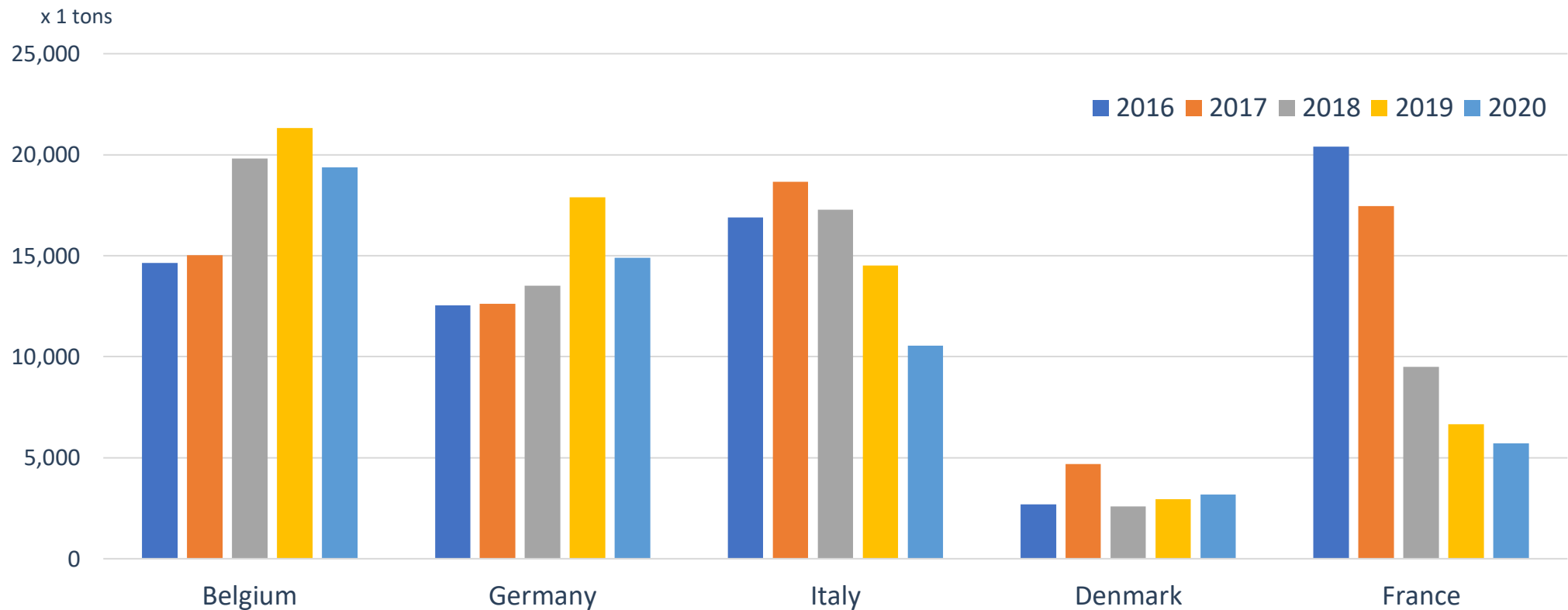
The import value of live plants from Belgium increased with 42.2% between 2018 and 2020. Belgium, Germany and Italy are the largest import countries after the Netherlands. The import value of live plants from Italy decreased over the same period.



FLORIDATA



Import volume live plants the United Kingdom from other countries

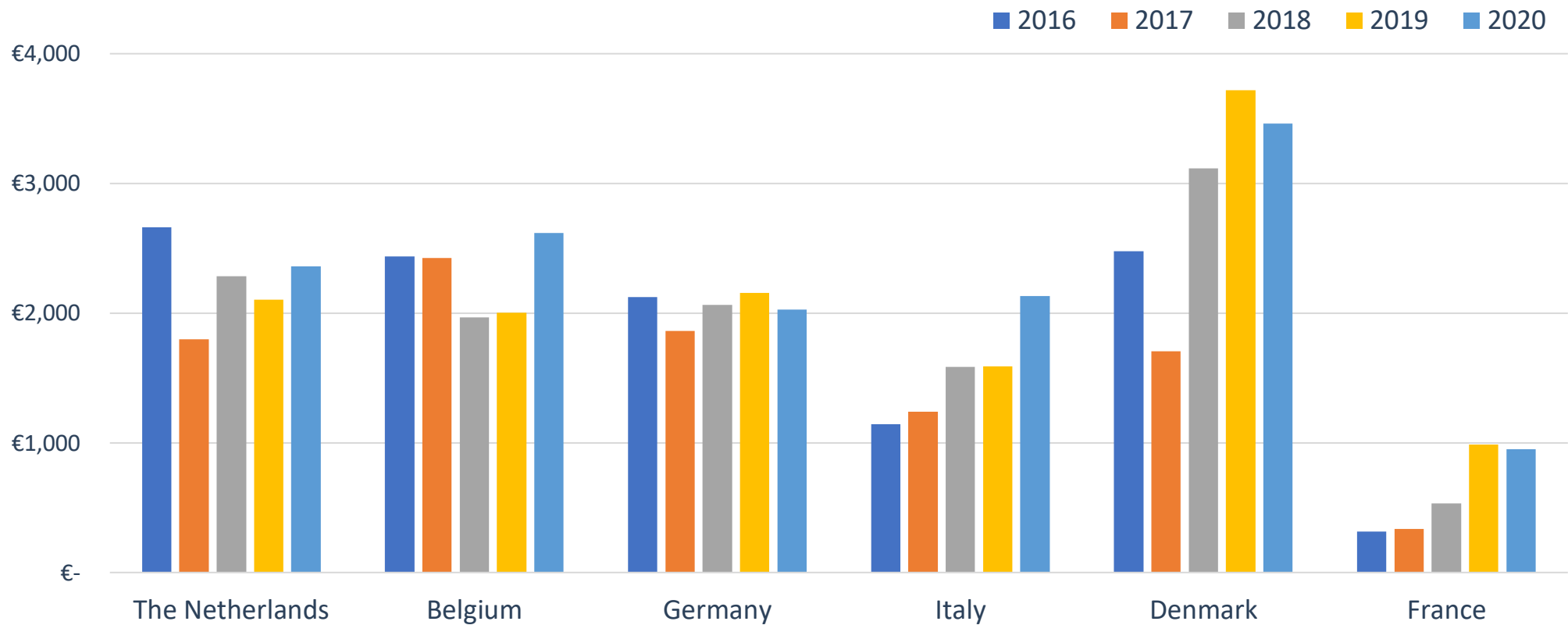


Source: UN Comtrade

The import volume of live plants from Belgium decreased with 2.2% between 2018 and 2020. For Germany it increased with 10.2% over the same period. The import volume of live plants from Italy and France decreased between 2018 and 2020.

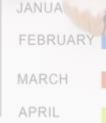


Import value per ton live plants the United Kingdom



Source: UN Comtrade

The import value per ton of live plants from The Netherlands increased with 3.4% between 2018 and 2020. For Belgium and Italy, the value per ton of live plants increased significantly during the same period.



Development value live plants import countries the United Kingdom

Live plants United Kingdom	Import value development	Import volume development	Value per ton development	Conclusion
	2016-2020	2016-2020	2016-2020	
The Netherlands	+22,2%	+37,8%	-11,3%	Increasing import value & increasing volume → decreasing value live plants.
Belgium	+42,2%	+32,3%	+7,5%	Increasing import value & increasing volume → increasing value live plants.
Germany	+13,1%	+18,6%	-4,6%	Increasing import value & increasing volume → decreasing value live plants.
Italy	+16,5%	-37,5%	+86,3%	Increasing import value & decreasing volume → increasing value live plants.
Denmark	+64,7%	+17,8%	+39,7%	Increasing import value & increasing volume → increasing value live plants.
France	-15,5%	-72,0%	+201,7%	Decreasing import value & decreasing volume → increasing value live plants.

Source: UN Comtrade and Floridata

The value of live plants from The Netherlands and Germany decreased during the period 2016-2020.
The value of live plants from Belgium, Italy, Denmark and France increased over the same period.



Development live plants per product group and country to the United Kingdom

Dutch import plants per product group to United Kingdom	Share of Dutch import value per product group to United Kingdom (source: ITC calculations based on UN Comtrade Statistics)				
	2016	2017	2018	2019	2020
Live outdoor plants	23,4%	26,0%	23,7%	27,1%	27,6%
Indoor flowering plants	31,6%	31,2%	30,6%	25,6%	27,4%
Live indoor green plants and cacti	27,2%	24,4%	20,6%	26,5%	26,0%
Vegetables and strawberry plants	10,5%	11,2%	17,0%	12,5%	10,9%
Edible fruit or nut trees/shrubs	4,2%	4,3%	5,2%	4,5%	5,0%
Roses	2,3%	2,1%	2,2%	3,0%	2,2%
Rhododendrons and azaleas	0,7%	0,9%	0,7%	0,7%	0,9%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

Dutch import value per product group to United Kingdom (source: Floridata & ITC calculations based on UN Comtrade Statistics)					
2016	2017	2018	2019	2020	2016-2020
€ 50.730	€ 53.869	€ 49.542	€ 62.345	€ 72.631	+43,2%
€ 68.662	€ 64.772	€ 64.005	€ 58.840	€ 72.133	+5,1%
€ 59.027	€ 50.679	€ 43.158	€ 60.905	€ 68.526	+16,1%
€ 22.855	€ 23.160	€ 35.484	€ 28.853	€ 28.598	+25,1%
€ 9.212	€ 8.863	€ 10.970	€ 10.417	€ 13.090	+42,1%
€ 4.950	€ 4.364	€ 4.547	€ 6.970	€ 5.780	+16,8%
€ 1.585	€ 1.868	€ 1.392	€ 1.629	€ 2.400	+51,4%
€ 217.021	€ 207.576	€ 209.099	€ 229.961	€ 263.158	+21,3%

Import of outdoor plants United Kingdom	Share of import value outdoor plants per country (source: ITC calculations based on UN Comtrade Statistics)				
	2016	2017	2018	2019	2020
Netherlands	56,7%	57,5%	53,0%	62,6%	67,9%
Belgium	16,7%	17,9%	16,4%	10,4%	13,8%
Germany	16,5%	13,7%	16,5%	20,4%	11,9%
Others	10,2%	10,9%	14,1%	6,5%	6,4%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

Import value of outdoor plants per country (source: Floridata & ITC calculations based on UN Comtrade Statistics)					
2016	2017	2018	2019	2020	2016-2020
€ 50.730	€ 53.869	€ 49.542	€ 62.345	€ 72.631	+43,2%
€ 14.910	€ 16.798	€ 15.322	€ 10.393	€ 14.731	-1,2%
€ 14.729	€ 12.812	€ 15.447	€ 20.360	€ 12.702	-13,8%
€ 9.108	€ 10.161	€ 13.188	€ 6.476	€ 6.881	-24,5%
€ 89.477	€ 93.640	€ 93.499	€ 99.574	€ 106.945	+19,5%

The value of all product groups increased between 2016-2020. Live outdoor plants increased significantly. The value of outdoor plants from Belgium and Germany decreased over the same period.



Import of flowering indoor plants United Kingdom	Share of import value indoor flowering plants per country (source: ITC calculations based on UN Comtrade Statistics)				
	2016	2017	2018	2019	2020
Netherlands	83,2%	82,4%	85,3%	81,4%	75,6%
Belgium	8,4%	10,3%	10,2%	12,3%	18,8%
Denmark	2,3%	2,5%	1,5%	3,2%	4,1%
Others	6,1%	4,9%	2,9%	3,1%	1,6%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

Import value of indoor flowering plants per country (source: Floridata & ITC calculations based on UN Comtrade Statistics)					
2016	2017	2018	2019	2020	2016-2020
€ 68.662	€ 64.772	€ 64.005	€ 58.840	€ 72.133	+5,1%
€ 6.909	€ 8.061	€ 7.686	€ 8.889	€ 17.976	+160,2%
€ 1.889	€ 1.933	€ 1.141	€ 2.293	€ 3.874	+105,1%
€ 5.023	€ 3.815	€ 2.210	€ 2.220	€ 1.483	-70,5%
€ 82.483	€ 78.581	€ 75.042	€ 72.242	€ 95.466	+15,7%

Import of green indoor plants and cacti United Kingdom	Share of import value green indoor plants and cacti per country (source: ITC calculations based on UN Comtrade Statistics)				
	2016	2017	2018	2019	2020
Netherlands	81,9%	86,1%	74,3%	83,5%	80,7%
Belgium	9,4%	4,8%	10,9%	8,6%	10,6%
Germany	3,1%	2,8%	3,1%	3,7%	4,4%
Italy	3,6%	3,7%	9,4%	2,9%	2,0%
Denmark	0,9%	1,1%	1,3%	0,6%	1,4%
Others	1,2%	1,6%	1,1%	0,7%	0,8%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

Import value of green indoor plants and cacti per country (source: Floridata & ITC calculations based on UN Comtrade Statistics)					
2016	2017	2018	2019	2020	2016-2020
€ 59.027	€ 50.679	€ 43.158	€ 60.905	€ 68.526	+16,1%
€ 6.753	€ 2.833	€ 6.321	€ 6.277	€ 9.038	+33,8%
€ 2.210	€ 1.633	€ 1.787	€ 2.711	€ 3.694	+67,1%
€ 2.593	€ 2.183	€ 5.457	€ 2.080	€ 1.726	-33,4%
€ 661	€ 632	€ 732	€ 465	€ 1.219	+84,4%
€ 868	€ 918	€ 646	€ 535	€ 706	-18,7%
€ 72.112	€ 58.878	€ 58.101	€ 72.973	€ 84.909	+17,7%

The value of flowering indoor plants from Belgium and Denmark increased significantly between 2016-2020.
The value of green indoor plants from Belgium and Germany increased significantly between 2016-2020.

