

## PERIOD 2020-2022

- Germany is export country number 1 for the Netherlands
- Floridata monitors 31.170 debtors in Germany
- Export growth cut flowers, period 2020-2022: **+13.0%**
- Export growth pot and garden plants, period 2020-2022: **+6.0%**



Edition: September 2023

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# Economical developments 2012 – 2022

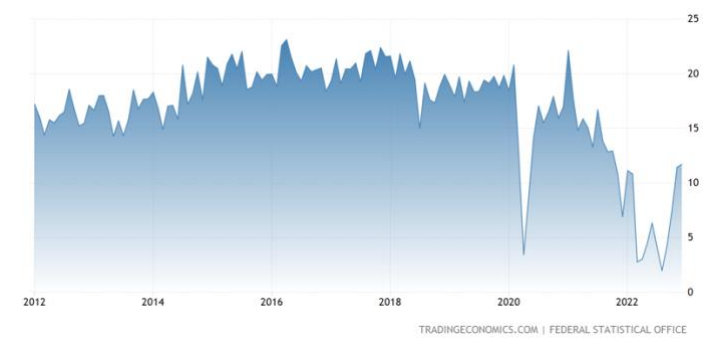
Population (mln.)



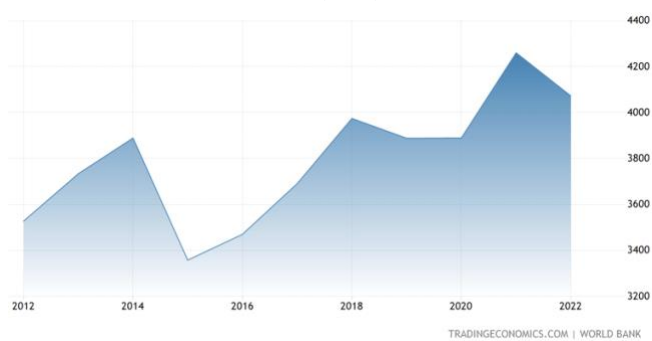
Unemployment Rate



Balance of Trade



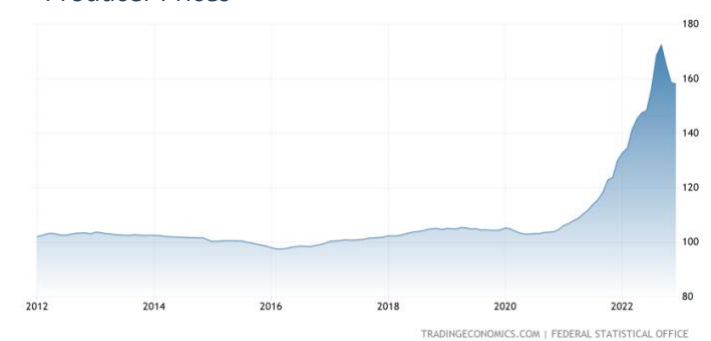
Gross Domestic Product (bln.)



Government Debt to GDP



Producer Prices



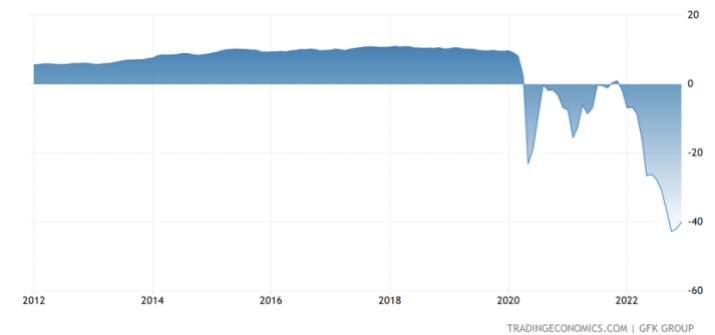
Consumer Price Index



Inflation

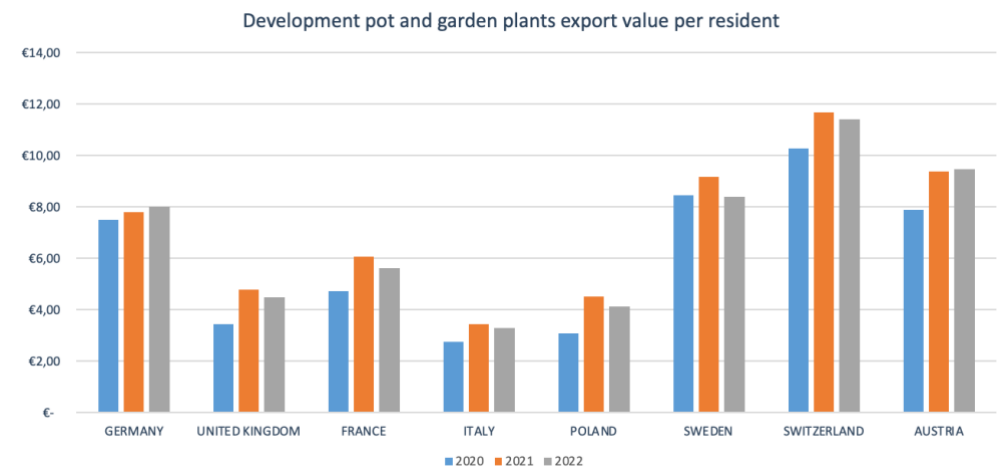
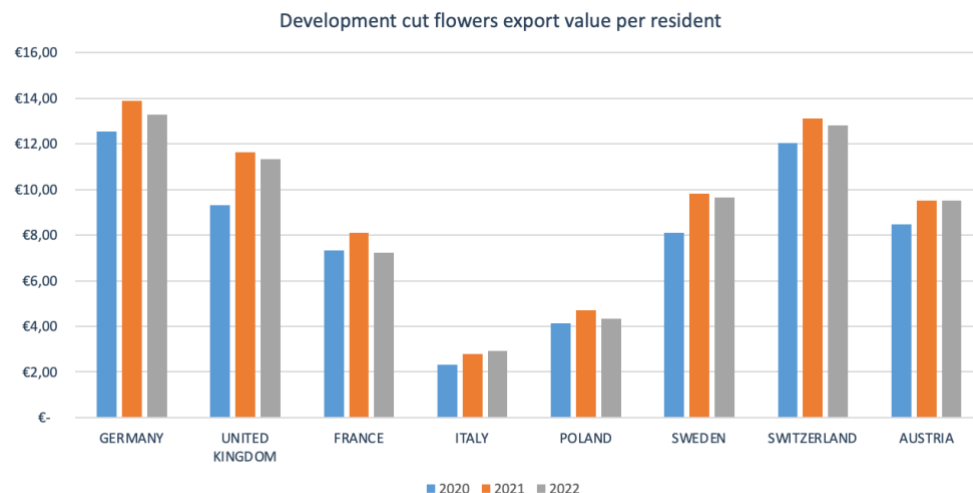
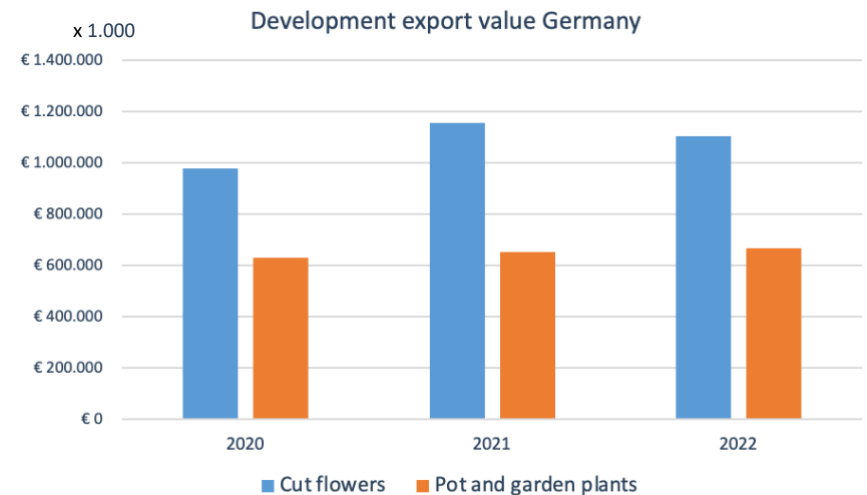


Consumer Confidence

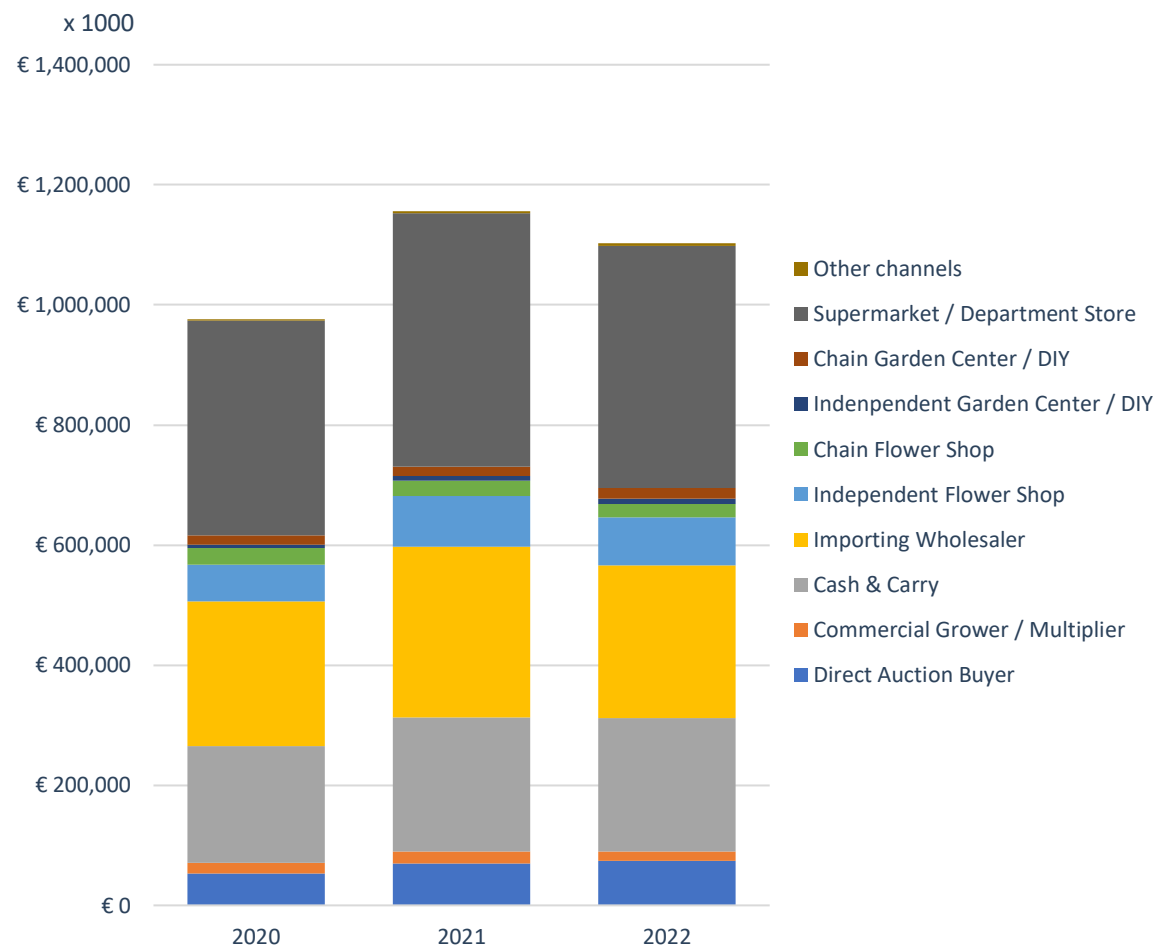


# Developments total export value to Germany compared to other countries

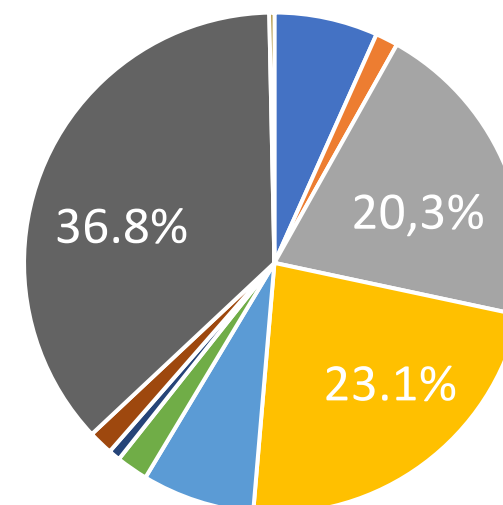
Rank	TOP 18 EXPORT COUNTRIES	TOTAL EXPORT VALUE CUT FLOWERS & POT AND GARDEN PLANTS (x1.000)					
		2017	2018	2019	2020	2021	2022
1	GERMANY	€ 1.727.401	€ 1.675.531	€ 1.666.266	€ 1.602.785	€ 1.805.726	€ 1.767.042
2	UNITED KINGDOM	€ 836.684	€ 825.962	€ 854.835	€ 879.863	€ 1.103.684	€ 1.069.027
3	FRANCE	€ 785.231	€ 782.384	€ 813.445	€ 756.611	€ 960.225	€ 871.390
4	ITALY	€ 319.937	€ 303.538	€ 301.474	€ 264.217	€ 368.099	€ 364.806
5	POLAND	€ 230.288	€ 244.932	€ 274.182	€ 283.556	€ 347.098	€ 347.022
6	BELGIUM	€ 263.456	€ 254.735	€ 266.693	€ 265.225	€ 312.493	€ 286.957
7	SWITZERLAND	€ 190.918	€ 191.909	€ 192.757	€ 187.939	€ 215.807	€ 212.166
8	SWEDEN	€ 178.589	€ 171.276	€ 171.429	€ 175.622	€ 197.563	€ 189.213
9	AUSTRIA	€ 138.452	€ 142.889	€ 145.703	€ 136.753	€ 169.268	€ 170.240
10	UNITED STATES OF AMERICA	€ 98.275	€ 91.121	€ 108.112	€ 79.986	€ 136.284	€ 165.603
11	DENMARK	€ 114.925	€ 115.879	€ 129.799	€ 151.730	€ 166.988	€ 162.435
12	SPAIN	€ 90.048	€ 91.912	€ 102.616	€ 96.831	€ 149.879	€ 153.922
13	RUSSIA	€ 165.409	€ 196.710	€ 226.858	€ 178.536	€ 185.534	€ 149.659
14	CZECH REPUBLIC	€ 107.915	€ 115.730	€ 120.881	€ 126.361	€ 141.359	€ 145.709
15	ROMANIA	€ 53.122	€ 63.304	€ 74.746	€ 65.212	€ 91.342	€ 100.389
16	IRELAND	€ 55.327	€ 50.877	€ 53.780	€ 60.867	€ 98.993	€ 93.275
17	HUNGARY	€ 60.110	€ 70.308	€ 79.055	€ 73.841	€ 90.157	€ 86.016
18	FINLAND	€ 62.770	€ 63.657	€ 69.063	€ 75.476	€ 83.308	€ 77.116
	OTHERS	€ 634.463	€ 665.241	€ 718.960	€ 638.865	€ 870.123	€ 878.243
	TOTAL	€ 6.015.233	€ 6.001.710	€ 6.235.374	€ 5.974.691	€ 7.294.020	€ 7.086.509



# Cut flowers export value to Germany per sales channel in 2020 – 2022



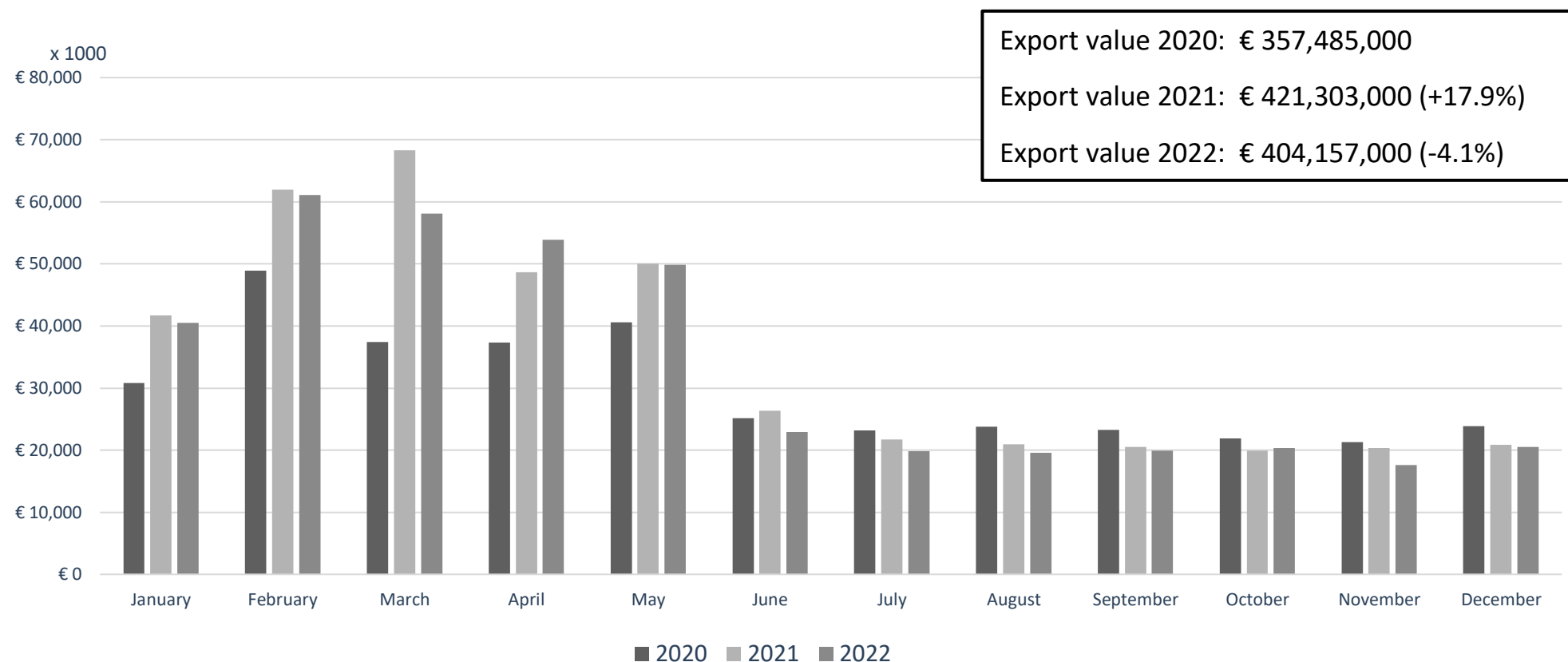
Sales channels Germany cut flowers 2022



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

1. Supermarket / Department Store (36.8%)
2. Importing Wholesaler (23.1%)
3. Cash & Carry (20.3%)

## Largest sales channel for cut flowers: Supermarket / Department Store



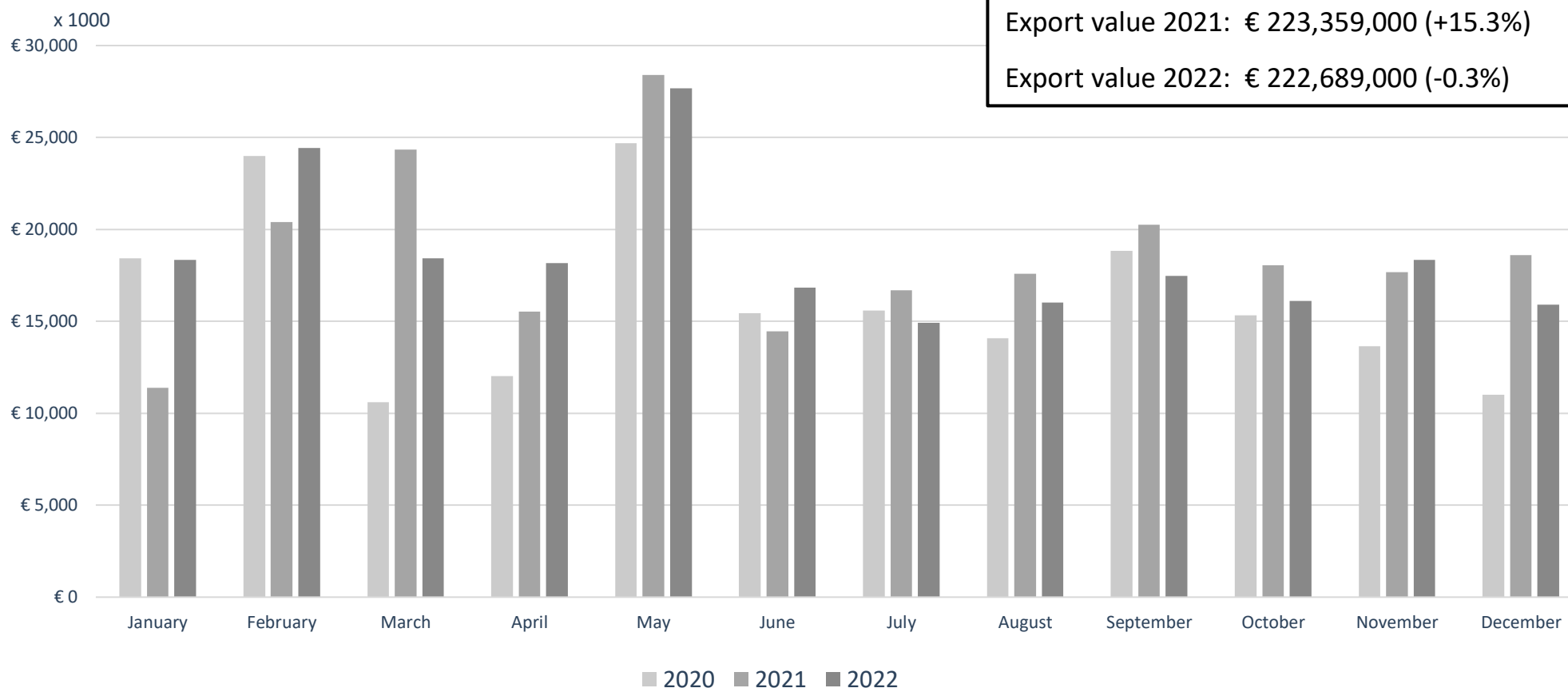
The export value of cut flowers to Supermarket / Department Store decreased between 2020 and 2022 with 13.1%. In 2021 the export value increased with 17.9% and in 2022 it decreased with 4.1%. Most of the export is generated in the months February to May.

## Second largest sales channel for cut flowers: Importing Wholesaler



The export value of cut flowers to Importing Wholesaler increased between 2020 and 2022 with 5.1%.  
In 2021 the export value increased with 17.8% and in 2022 the export value decreased with 10.8%.

## Third largest sales channel for cut flowers: Cash & Carry



The export value of cut flowers to Importing Wholesaler increased between 2020 and 2022 with 15.0%.  
In 2021 the export value increased with 15.3% and in 2022 the export value decreased with 0.3%.



# Dutch export position cut flowers Germany

## Development Dutch import share cut flowers

GERMANY

2016

89,7%

2017

90,8%

2018

91,1%

2019

90,2%

2020

91,5%

2021

89,4%

2022

91,0%

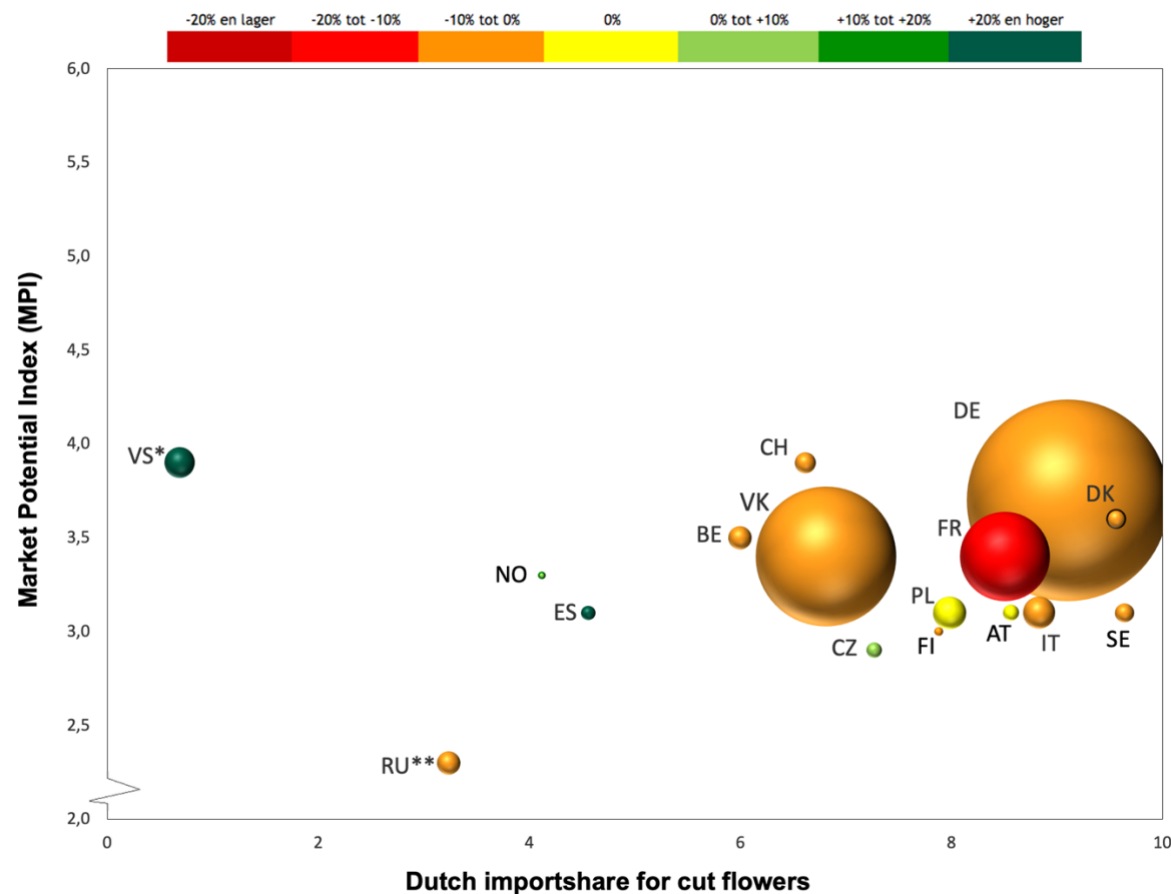
The **vertical axis** illustrates the height of the **market potential**. The higher the globe is positioned in the matrix, the higher the market potential is of the country to do business with. The market potential is determined with weighted scores in different dimensions, such as market size, -intensity, -growth, -consumption, commercial infrastructure, economical liberty and country's risk. The MPI-value for the United States is not available and is 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 potted- and gardening 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).

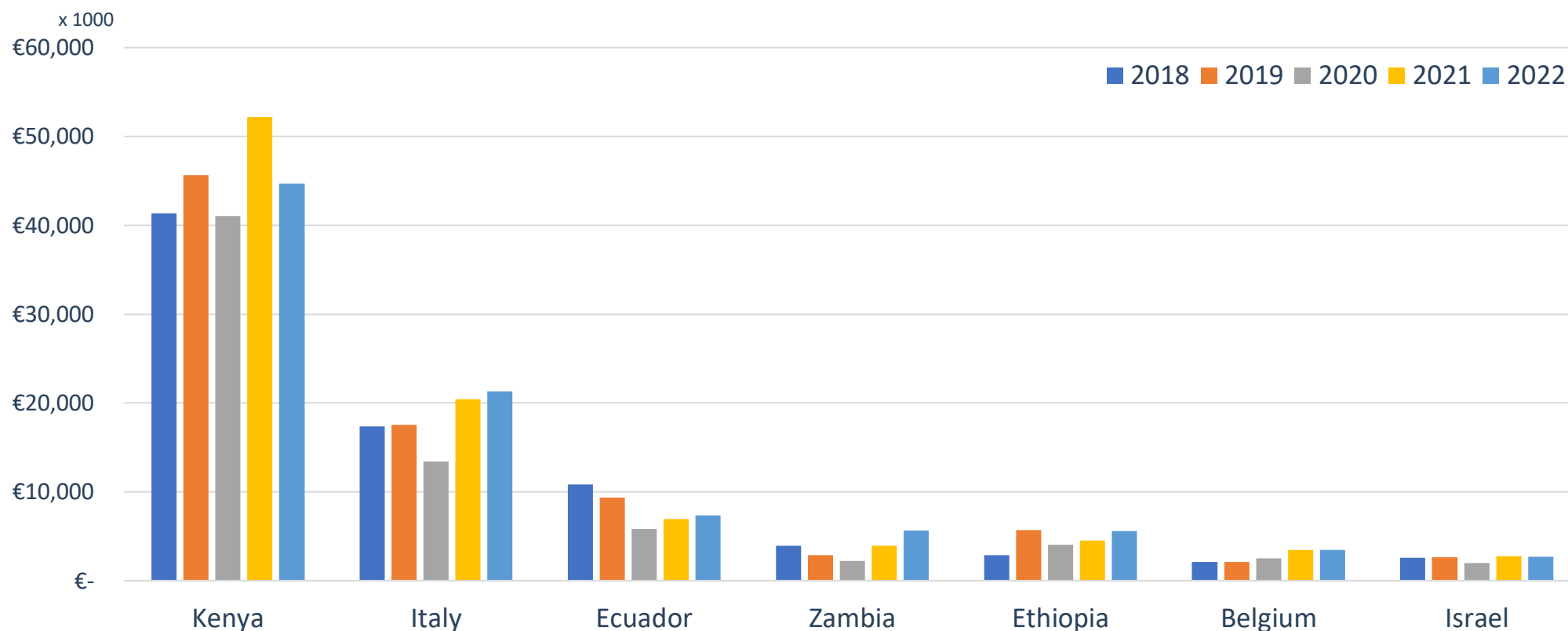
## Market potential-Export position Matrix 2022



Source: UN Comtrade and Floridata



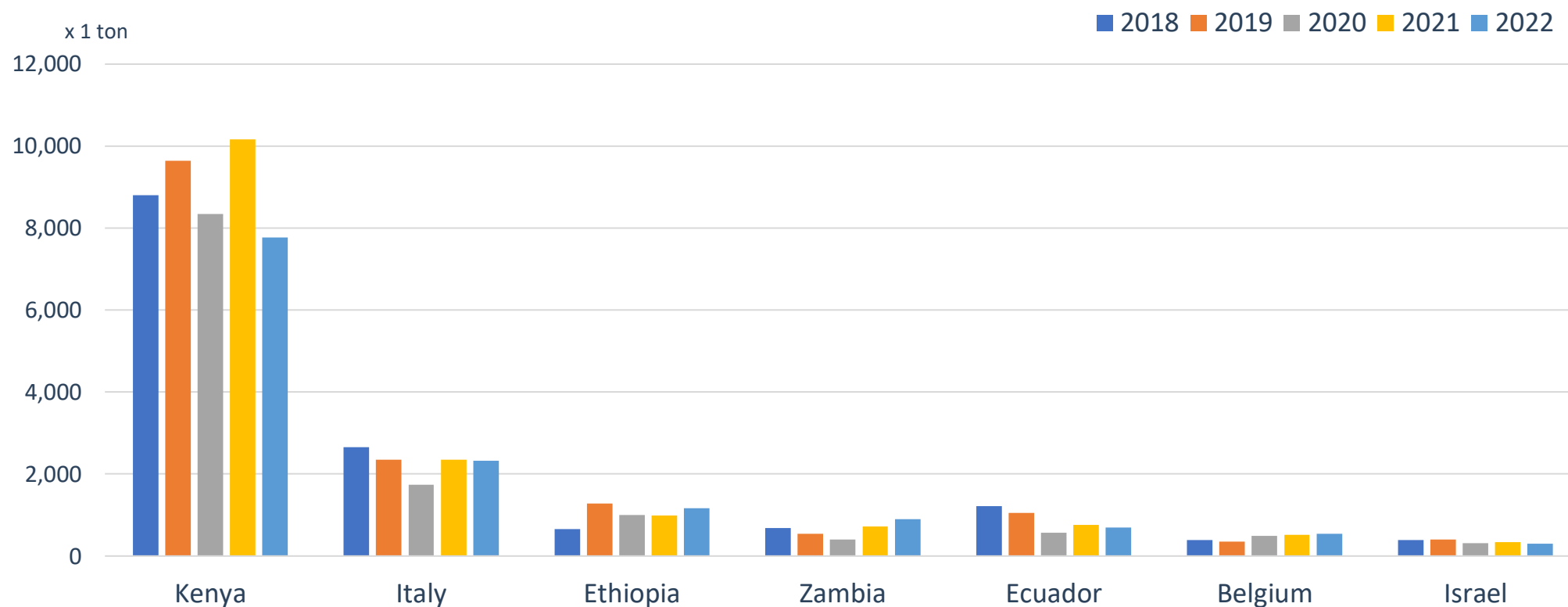
# Import value cut flowers Germany from other countries



Source: UN Comtrade

The import value of cut flowers from Kenya increased with 9.0% between 2020 and 2022. Kenya is the largest import country after the Netherlands. The import value of cut flowers from Italy increased with 58.8% and from Ecuador it increased with 26.5% over the same period.

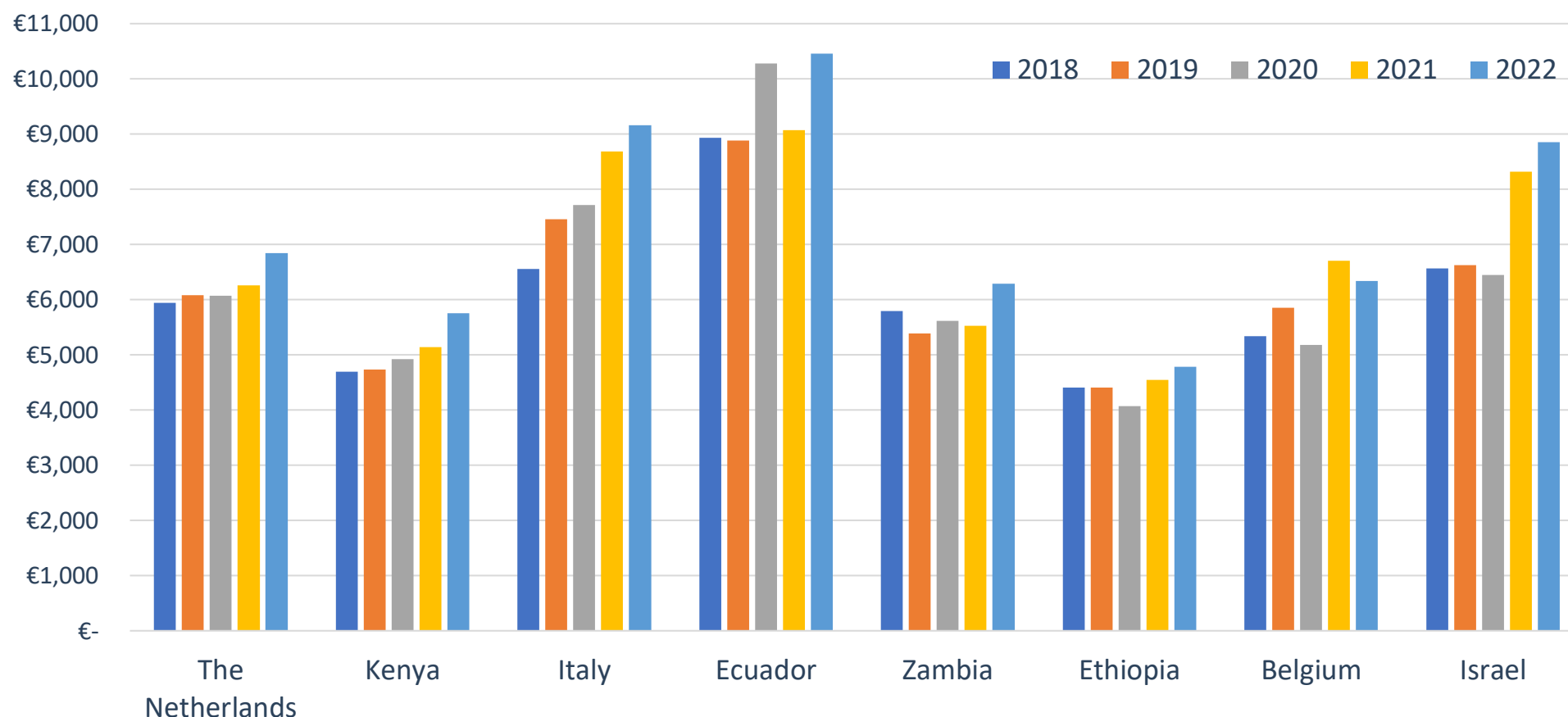
## Import volume cut flowers Germany from other countries



Source: UN Comtrade

The import volume of cut flowers from Kenya decreased with 6.8% between 2020 and 2022. The import volume of cut flowers from Italy increased with 33.8% and from Ethiopia it increased with 16.7% over the same period.

# Import value per ton cut flowers Germany



Source: UN Comtrade

The import value per ton cut flowers from the Netherlands increased with 12.7% between 2020 and 2022. For Kenya, Italy and Ecuador the import value per ton cut flowers increased over the same period.



Cut flowers Germany	Import value development	Import volume development	Value per ton development	Conclusion
	2018-2022	2018-2022	2018-2022	
The Netherlands	16.0%	0.6%	15.3%	Increasing import value & increasing volume → increasing value cut flowers.
Kenya	8.2%	-11.6%	22.5%	Increasing import value & decreasing volume → increasing value cut flowers.
Italy	22.5%	-12.3%	39.8%	Increasing import value & decreasing volume → increasing value cut flowers.
Ecuador	-32.5%	-42.3%	17.1%	Decreasing import value & decreasing volume → increasing value cut flowers.
Ethiopia	94.6%	79.3%	17.1%	Increasing import value & increasing volume → increasing value cut flowers.
Zambia	43.6%	32.5%	8.4%	Increasing import value & increasing volume → increasing value cut flowers.
Belgium	63.5%	37.6%	18.9%	Increasing import value & increasing volume → increasing value cut flowers.
Israel	4.7%	-22.3%	34.8%	Increasing import value & decreasing volume → increasing value cut flowers.

Source: UN Comtrade and Floridata

The value of cut flowers from all countries increased between 2018-2022.

# Development cut flowers per product group and country to Germany

Dutch import cut flowers per product group to Germany	Share of Dutch import value per product group to Germany (source: ITC calculations based on Federal Statistical Office of Germany)				
	2018	2019	2020	2021	2022
Cut flower others	59,2%	59,3%	57,5%	61,8%	62,8%
Roses	25,1%	24,8%	24,6%	22,2%	21,2%
Foliage	6,3%	5,9%	6,1%	5,6%	5,2%
Chysanthemums	4,7%	4,8%	5,1%	4,9%	5,2%
Carnations	2,0%	2,7%	3,6%	2,3%	2,5%
Dried/bleached/impregnated	0,6%	0,7%	1,3%	1,4%	1,1%
Lilies	1,0%	1,0%	1,0%	1,0%	1,1%
Orchids	1,1%	0,8%	0,9%	0,9%	0,8%
<b>Total</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>

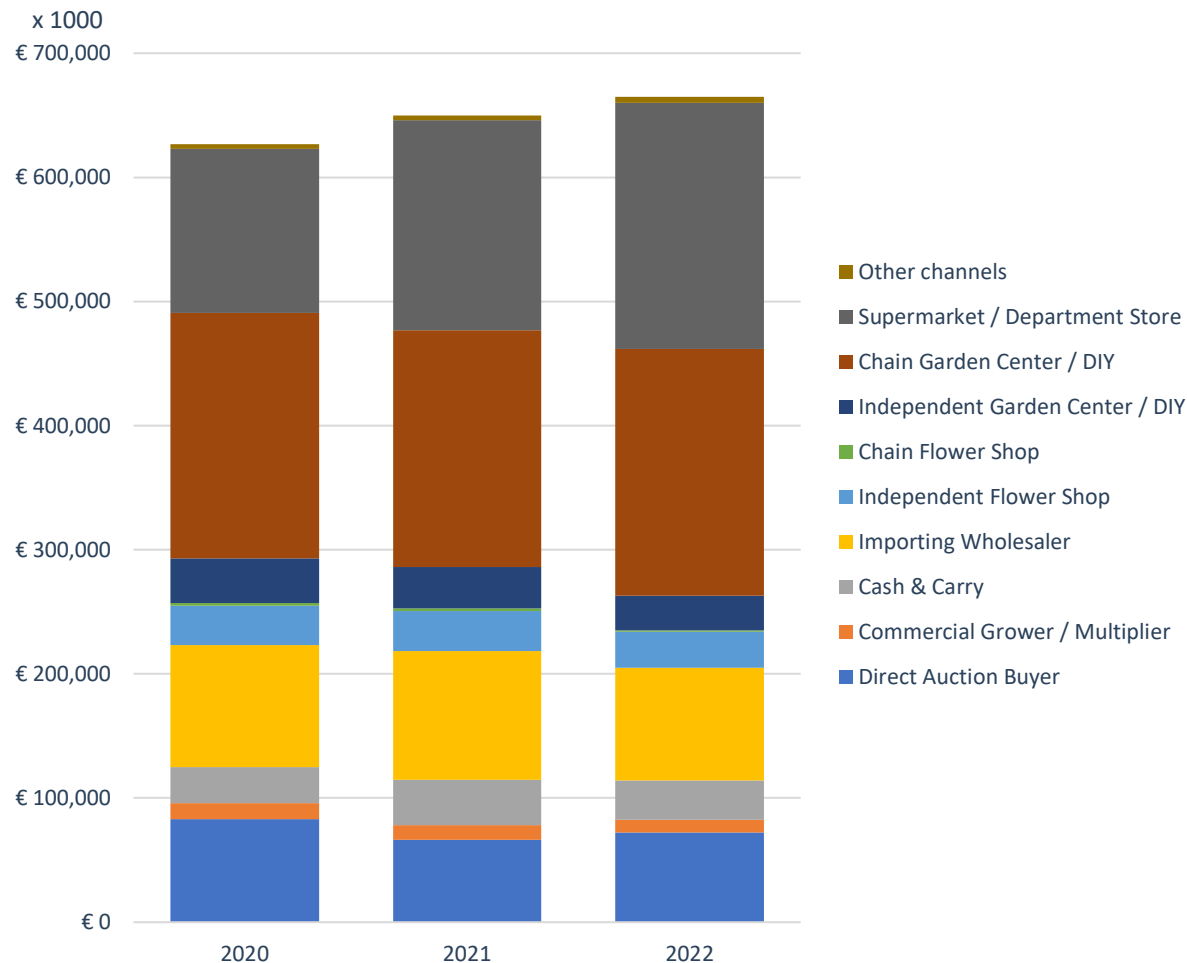
Dutch import value per product group to Germany (source: Floridata & ITC calculations based on Federal Statistical Office of Germany)					
2018	2019	2020	2021	2022	2018-2022
€ 621.738	€ 617.471	€ 560.818	€ 714.370	€ 692.756	11,4%
€ 263.563	€ 257.878	€ 239.994	€ 256.212	€ 233.659	-11,3%
€ 65.865	€ 61.561	€ 59.695	€ 64.431	€ 57.756	-12,3%
€ 49.041	€ 50.389	€ 50.190	€ 56.782	€ 57.724	17,7%
€ 20.666	€ 28.543	€ 34.779	€ 26.556	€ 27.330	32,2%
€ 6.552	€ 7.162	€ 12.476	€ 16.194	€ 12.250	87,0%
€ 10.502	€ 10.337	€ 9.656	€ 11.588	€ 11.960	13,9%
€ 11.649	€ 8.547	€ 8.369	€ 9.862	€ 8.950	-23,2%
€ 1.049.576	€ 1.041.888	€ 975.977	€ 1.155.995	€ 1.102.386	5,0%

Import of roses Germany	Share of import value roses per country (source: ITC calculations based on Federal Statistical Office of Germany)				
	2018	2019	2020	2021	2022
Netherlands	81,4%	78,5%	81,8%	80,0%	80,6%
Kenya	12,5%	13,4%	13,5%	15,2%	13,8%
Zambia	1,2%	0,9%	0,8%	1,2%	2,0%
Ecuador	2,5%	2,2%	1,4%	1,6%	1,7%
Others	2,4%	5,0%	2,5%	1,9%	1,9%
<b>Total</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>

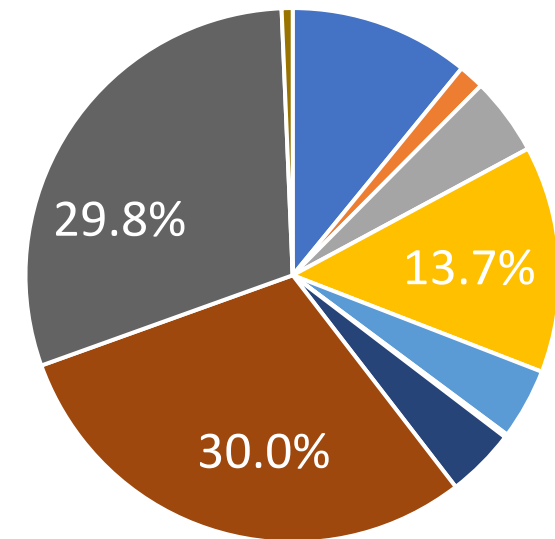
Import value of roses per country (source: Floridata & ITC calculations based on Federal Statistical Office of Germany)					
2018	2019	2020	2021	2022	2018-2022
€ 263.563	€ 257.878	€ 239.994	€ 256.212	€ 233.659	-11,3%
€ 40.420	€ 44.027	€ 39.618	€ 48.726	€ 39.952	-1,2%
€ 3.947	€ 2.898	€ 2.246	€ 3.959	€ 5.668	43,6%
€ 8.135	€ 7.334	€ 4.175	€ 5.195	€ 5.058	-37,8%
€ 7.762	€ 16.333	€ 7.270	€ 6.097	€ 5.597	-27,9%
€ 323.827	€ 328.470	€ 293.303	€ 320.189	€ 289.934	-10,5%

The value of roses and foliage decreased between 2018 and 2022.

# Pot and garden plants export value to Germany per sales channel in 2020 – 2022 FLORIDATA



Sales channels Germany pot and garden plants 2022

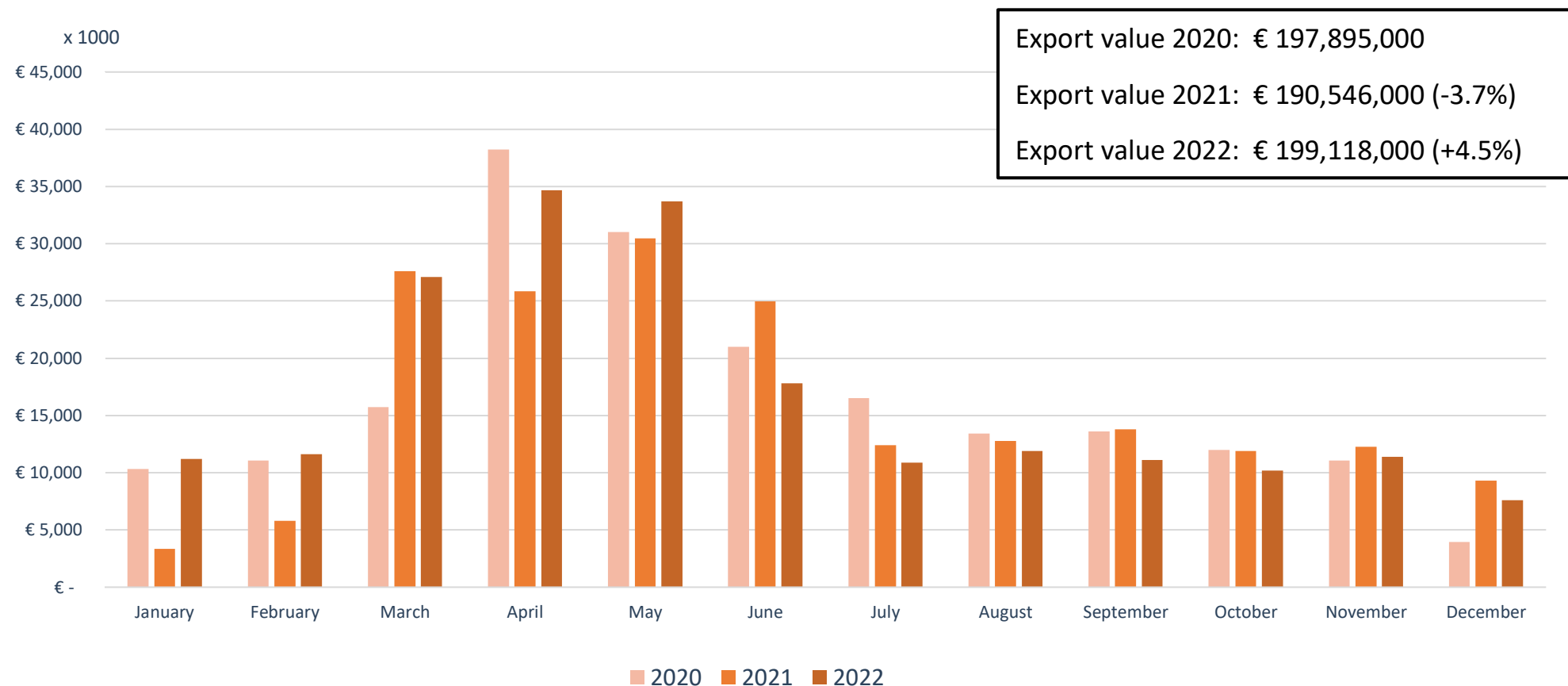


The three largest sales channels for the export of cut flowers are:

1. Chain Garden Center / DIY (30.0%)
2. Supermarket/Department Store (29.8%)
3. Importing Wholesaler (13.7%)



## 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 2020 and 2022 with 0.6%.  
In 2021 the export value decreased with 3.7% and in 2022 the export value increased with 4.5%.



## 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 between 2020 and 2022 with 50.4%. In 2021 the export value increased with 28.5% and in 2022 the export value increased with 17.0%.

## Third largest sales channel for pot and garden plants: Importing Wholesaler



The export value of pot and garden plants to Importing Wholesaler decreased between 2020 and 2022 with 6.7%.  
In 2021 the export value increased with 6.1% and in 2022 the export value decreased with 12.1%.

## Development Dutch import share live plants

GERMANY

	2016	2017	2018	2019	2020	2021	2022
	74,1%	73,0%	72,7%	72,8%	71,7%	70,9%	71,5%

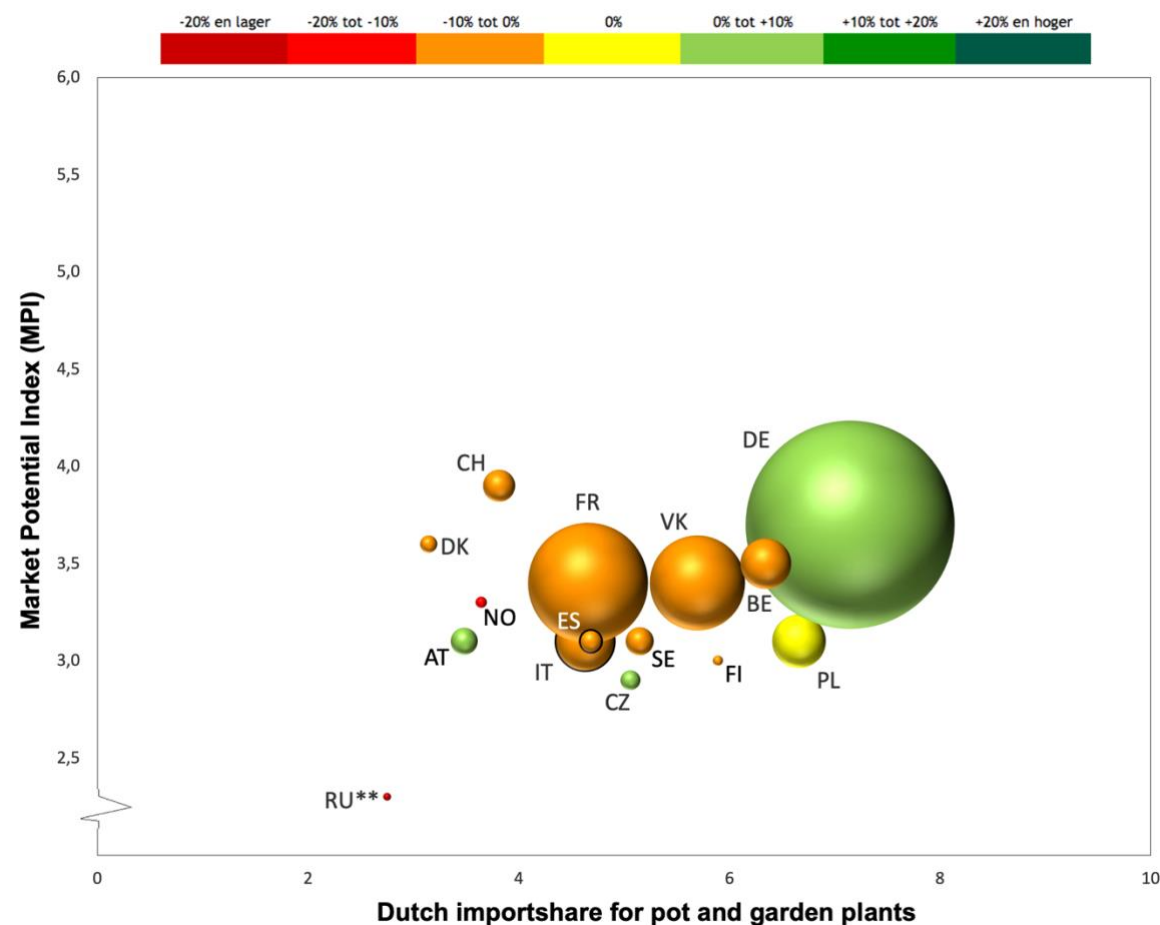
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The **size of the globe** illustrates the **Dutch export value** to the concerning country, measured against the total Dutch export to all top 16 countries. Meaning, the larger the globe, the larger the export share of the concerning country is from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

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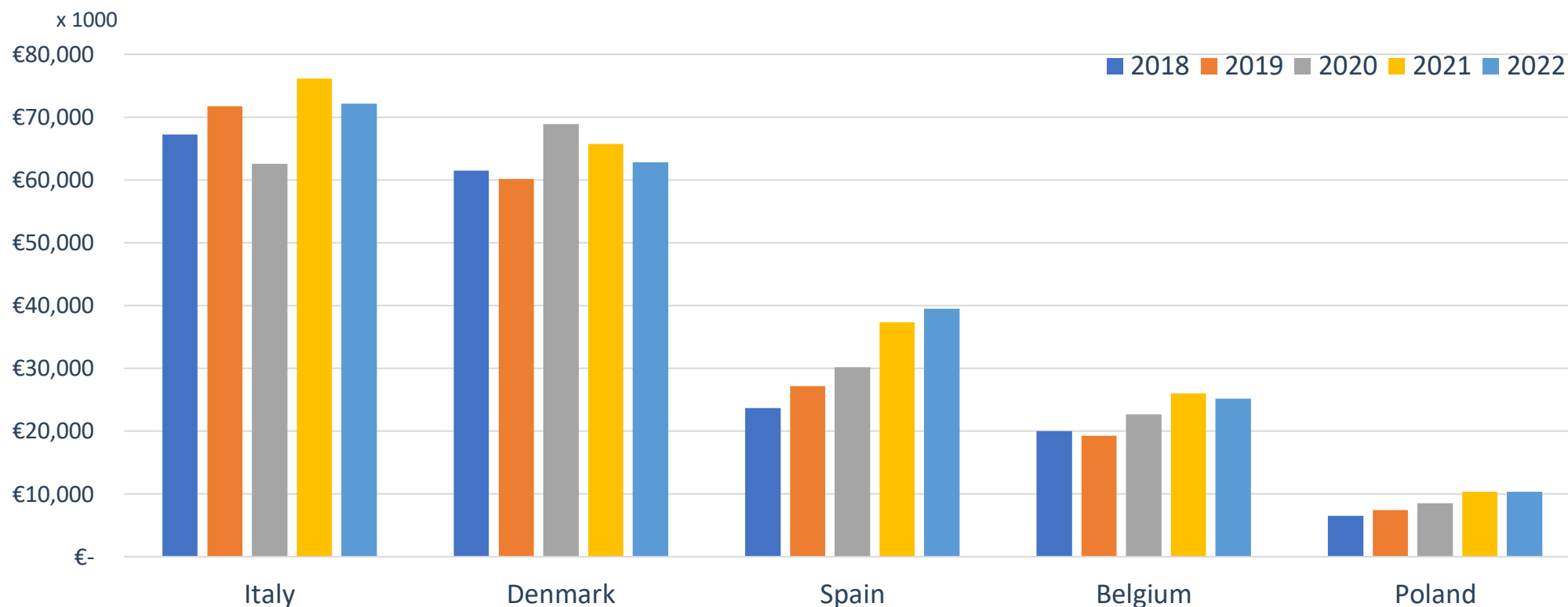
## Market potential-Export position Matrix 2022



Source: UN Comtrade and Floridata



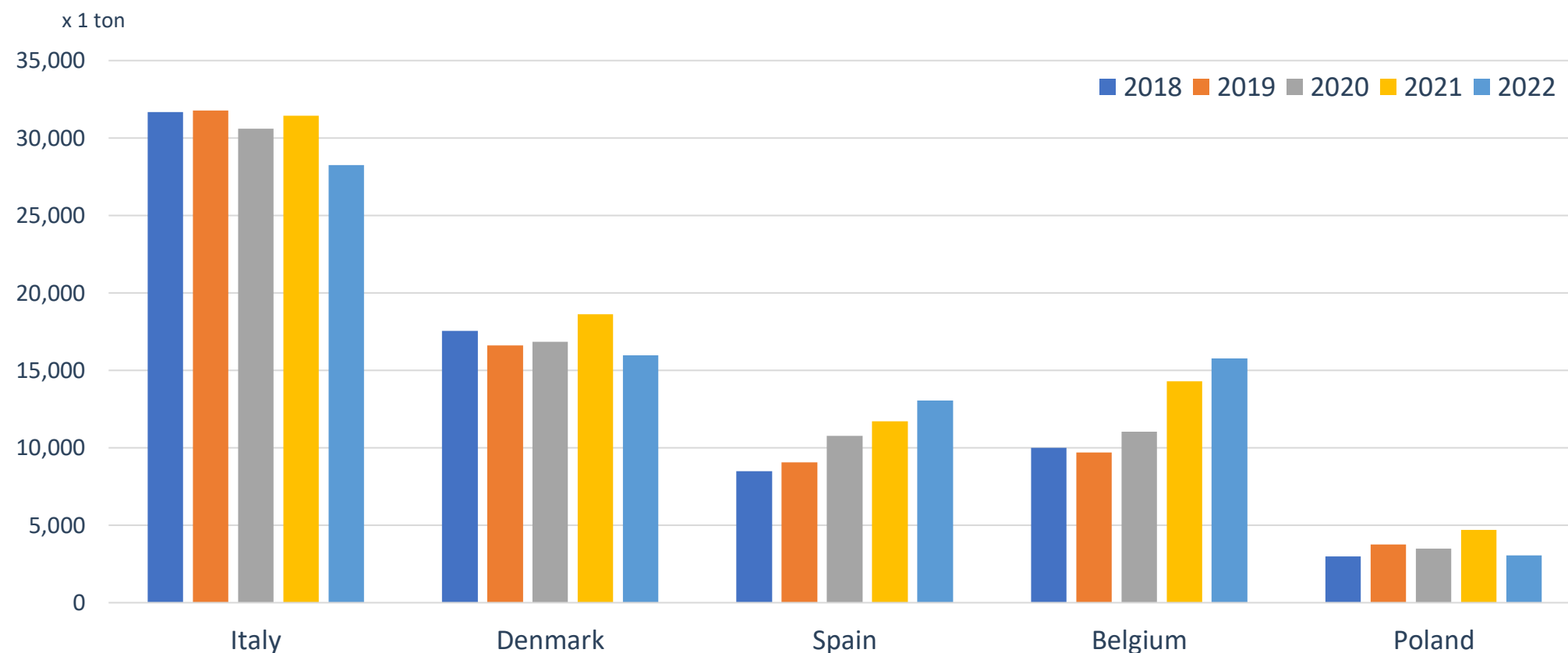
## Import value live plants Germany from other countries



Source: UN Comtrade

The import value of live plants from Italy increased with 15.4% and from Denmark it decreased with 8.8% between 2020 and 2022. Italy and Denmark are the largest import countries after the Netherlands. The import value of live plants from Spain, Belgium and Poland increased between 2020 and 2022.

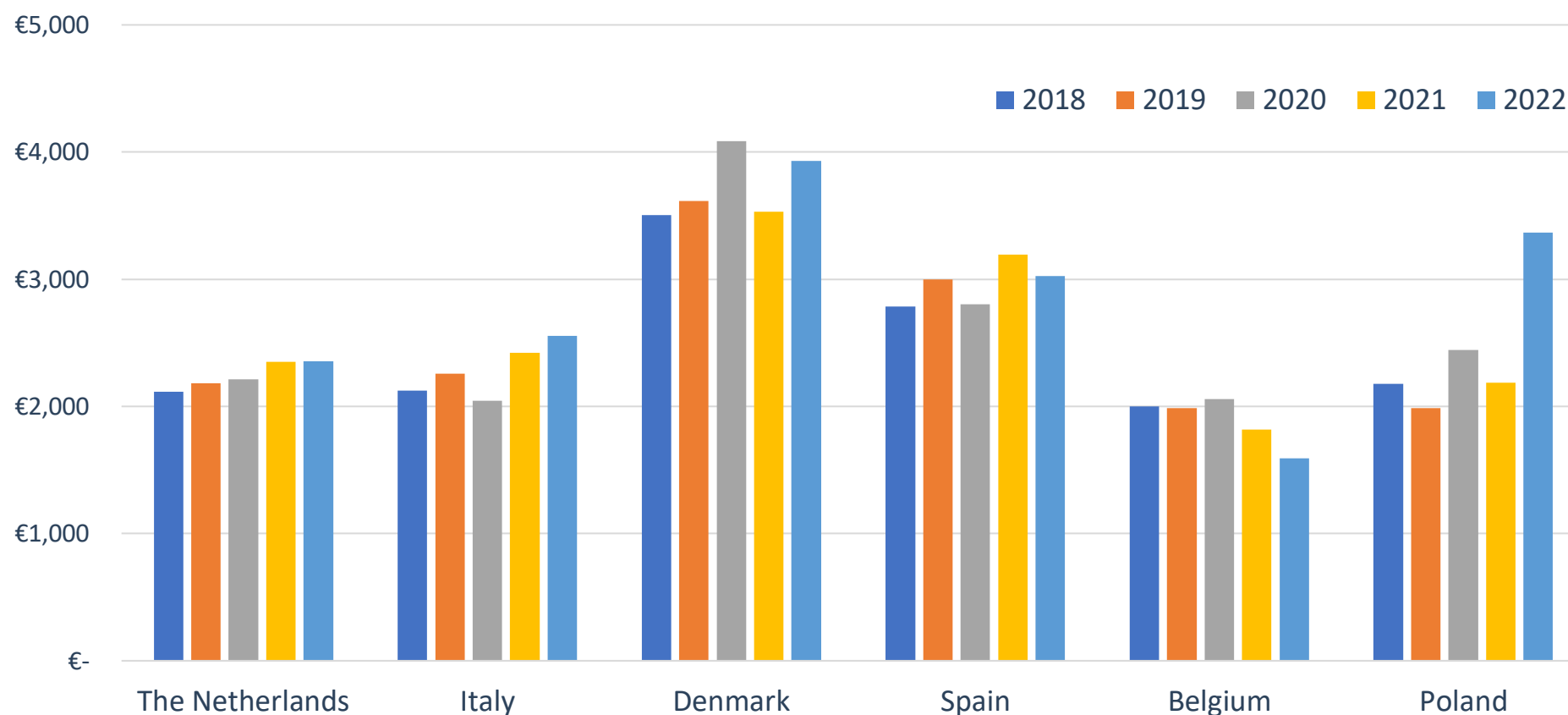
## Import volume live plants Germany from other countries



Source: UN Comtrade

The import volume of live plants from Italy decreased with 7.6% and from Denmark it decreased with 5.2% between 2020 and 2022. The import volume of live plants from Spain and Belgium increased between 2020 and 2022.

## Import value per ton live plants Germany



Source: UN Comtrade

The import value per ton of live plants from The Netherlands increased with 6.4% between 2020 and 2022. For other import countries the value per ton of live plants increased during the same period, except for Denmark and Belgium.

Live plants Germany	Import value development	Import volume development	Value per ton development	Conclusion
	2018-2022	2018-2022	2018-2022	
The Netherlands	18.9%	6.9%	11.2%	Increasing import value & increasing volume → increasing value live plants.
Italy	7.3%	-10.8%	20.3%	Increasing import value & decreasing volume → increasing value live plants.
Denmark	2.2%	-8.9%	12.2%	Increasing import value & decreasing volume → increasing value live plants.
Spain	66.8%	53.7%	8.5%	Increasing import value & increasing volume → increasing value live plants.
Belgium	25.7%	58.0%	-20.4%	Increasing import value & increasing volume → decreasing value live plants.
Poland	58.4%	2.5%	54.6%	Increasing import value & increasing volume → increasing value live plants.

Source: UN Comtrade and Floridata

The value of live plants from all countries increased over the period 2018-2022, except for Belgium.

# Development live plants per product group and country to Germany

Dutch import plants per product group to Germany	Share of Dutch import value per product group to Germany (source: ITC calculations based on Federal Statistical Office of Germany)				
	2018	2019	2020	2021	2022
Live outdoor plants	30,0%	29,9%	32,7%	33,1%	31,9%
Indoor flowering plants	34,6%	34,3%	32,7%	31,6%	31,4%
Live indoor green plants and cacti	26,7%	27,8%	26,9%	27,4%	30,1%
Vegetables and strawberry plants	3,7%	3,4%	3,1%	3,1%	2,4%
Edible fruit or nut trees/shrubs	2,6%	2,3%	2,3%	2,7%	2,2%
Roses	2,2%	2,1%	1,9%	1,8%	1,7%
Rhododendrons and azaleas	0,3%	0,3%	0,3%	0,4%	0,2%
<b>Total</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>

Dutch import value per product group to Germany (source: Floridata & ITC calculations based on Federal Statistical Office of Germany)					
2018	2019	2020	2021	2022	2018-2022
€ 187.724	€ 186.436	€ 205.212	€ 215.370	€ 212.025	12,9%
€ 216.287	€ 214.022	€ 205.024	€ 205.066	€ 208.584	-3,6%
€ 166.926	€ 173.548	€ 168.635	€ 177.936	€ 200.262	20,0%
€ 22.967	€ 21.149	€ 19.575	€ 20.108	€ 15.982	-30,4%
€ 16.037	€ 14.077	€ 14.262	€ 17.296	€ 14.715	-8,2%
€ 13.877	€ 13.096	€ 12.064	€ 11.663	€ 11.603	-16,4%
€ 2.138	€ 2.051	€ 2.036	€ 2.293	€ 1.484	-30,6%
€ 625.955	€ 624.378	€ 626.808	€ 649.731	€ 664.656	6,2%

Import of outdoor plants Germany	Share of import value outdoor plants per country (source: ITC calculations based on Federal Statistical Office of Germany)				
	2018	2019	2020	2021	2022
Netherlands	78,0%	75,7%	80,3%	75,7%	74,7%
Italy	9,4%	11,0%	9,0%	10,0%	10,2%
Spain	3,0%	3,8%	4,2%	4,3%	5,3%
Denmark	3,7%	3,8%	3,1%	3,7%	3,3%
Belgium	2,2%	2,1%	2,5%	2,4%	2,5%
Others	3,7%	3,6%	0,9%	3,9%	4,0%
<b>Total</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>

Import value of outdoor plants per country (source: Floridata & ITC calculations based on Federal Statistical Office of Germany)					
2018	2019	2020	2021	2022	2018-2022
€ 187.724	€ 186.436	€ 205.212	€ 215.370	€ 212.025	12,9%
€ 22.720	€ 27.156	€ 22.898	€ 28.564	€ 28.874	27,1%
€ 7.165	€ 9.486	€ 10.789	€ 12.233	€ 14.948	108,6%
€ 8.782	€ 9.298	€ 7.973	€ 10.653	€ 9.410	7,2%
€ 5.372	€ 5.243	€ 6.268	€ 6.701	€ 7.159	33,3%
€ 8.819	€ 8.814	€ 2.394	€ 11.018	€ 11.348	28,7%
€ 240.582	€ 246.433	€ 255.534	€ 284.539	€ 283.764	17,9%

The value of live outdoor plants and live indoor green plants and cacti increased between 2018-2022. The value of indoor flowering plants, vegetables and strawberry plants and roses decreased over the same period.

The value of live outdoor plants from Italy and Spain increased significantly.



Import of flowering indoor plants Germany	Share of import value indoor flowering plants per country (source: ITC calculations based on Federal Statistical Office of Germany)				
	2018	2019	2020	2021	2022
Netherlands	80,3%	81,0%	76,6%	80,1%	80,5%
Denmark	12,2%	11,9%	15,2%	12,1%	11,7%
Italy	4,0%	3,8%	4,1%	3,8%	3,5%
Spain	1,7%	1,6%	2,2%	2,2%	1,7%
Belgium	1,6%	1,5%	1,5%	1,5%	1,7%
Others	0,2%	0,3%	0,4%	0,3%	0,8%
<b>Total</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>

Import value of indoor flowering plants per country (source: Floridata & ITC calculations based on Federal Statistical Office of Germany)						
2018	2019	2020	2021	2022	2018-2022	
€ 216.287	€ 214.022	€ 205.024	€ 205.066	€ 208.584	-3,6%	
€ 32.782	€ 31.426	€ 40.784	€ 30.965	€ 30.346	-7,4%	
€ 10.794	€ 9.931	€ 11.018	€ 9.780	€ 9.077	-15,9%	
€ 4.594	€ 4.276	€ 5.878	€ 5.660	€ 4.504	-2,0%	
€ 4.368	€ 3.894	€ 3.894	€ 3.932	€ 4.357	-0,3%	
€ 572	€ 749	€ 943	€ 757	€ 2.113	269,4%	
€ 269.397	€ 264.298	€ 267.541	€ 256.160	€ 258.981	-3,9%	

Import of green indoor plants and cacti Germany	Share of import value green indoor plants and cacti per country (source: ITC calculations based on Federal Statistical Office of Germany)				
	2017	2018	2019	2020	2021
Netherlands	84,6%	85,5%	83,8%	80,8%	82,8%
Denmark	5,8%	5,8%	6,6%	6,9%	6,6%
Italy	3,4%	2,4%	2,4%	4,2%	4,0%
Spain	2,0%	1,7%	2,6%	3,6%	2,8%
Belgium	1,6%	1,7%	2,1%	2,5%	2,3%
Others	2,6%	2,9%	2,6%	2,0%	1,5%
<b>Total</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>

Import value of green indoor plants and cacti per country (source: Floridata & ITC calculations based on Federal Statistical Office of Germany)						
2017	2018	2019	2020	2021	2017-2021	
€ 166.926	€ 173.548	€ 168.635	€ 177.936	€ 200.262	20,0%	
€ 11.413	€ 11.840	€ 13.274	€ 15.254	€ 16.059	40,7%	
€ 6.617	€ 4.787	€ 4.757	€ 9.276	€ 9.680	46,3%	
€ 3.970	€ 3.469	€ 5.201	€ 7.817	€ 6.675	68,1%	
€ 3.246	€ 3.437	€ 4.234	€ 5.441	€ 5.471	68,5%	
€ 5.228	€ 5.948	€ 5.152	€ 4.427	€ 3.671	-29,8%	
€ 197.400	€ 203.029	€ 201.253	€ 220.151	€ 241.818	22,5%	

The value of flowering indoor plants from almost all countries decreased between 2018 and 2022.

The value of green indoor plants and cacti from Denmark significantly increased, as well as from Italy, Spain and Belgium.