

FLORIDATA[®] MARKET REPORT FRANCE

Period 2020-2022

- 🌸 France is the 3rd export country for the Netherlands
- 🌸 Floridata monitors 26.734 debtors in France
- 🌸 Export growth cut flowers, period 2020-2022: **+13.7%**
- 🌸 Export growth pot and garden plants, period 2020-2022: **+17.1%**



Edition: September 2023

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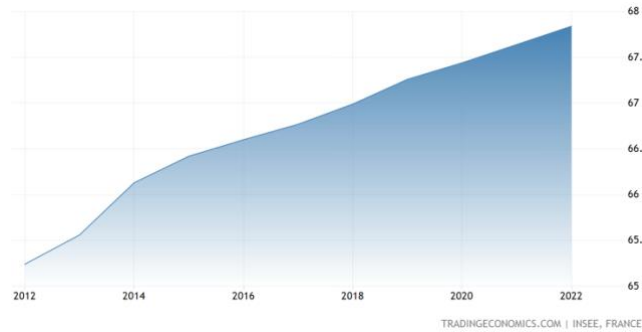


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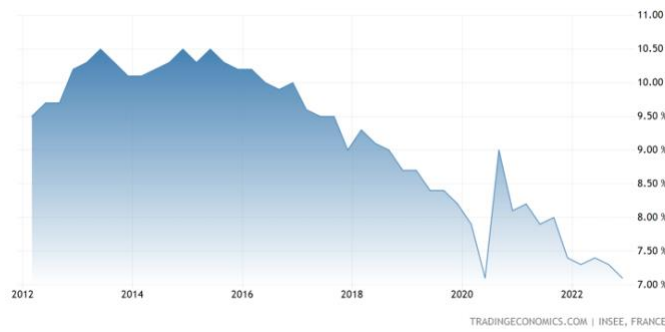
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Economical developments 2012 – 2022

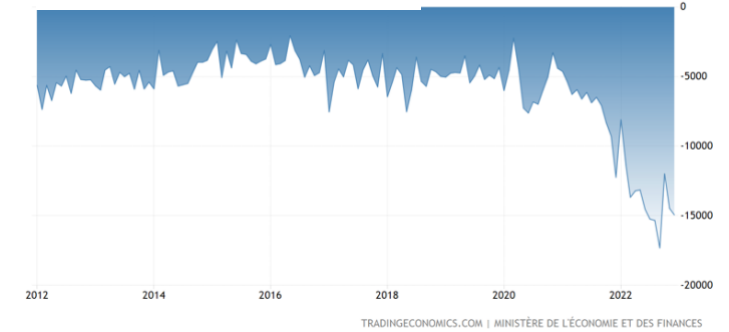
Population (mln.)



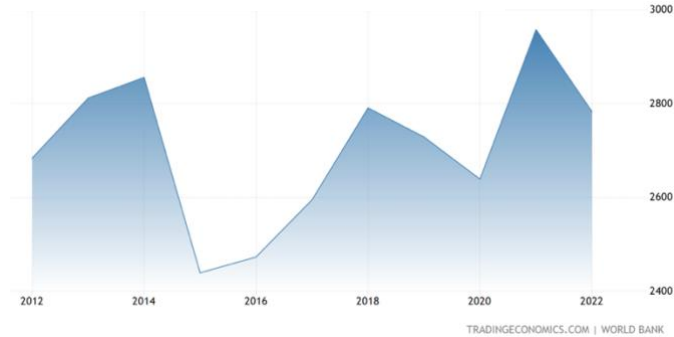
Unemployment Rate



Balance of Trade



Gross Domestic Product (bln.)



Government Debt to GDP



Producer Prices



Consumer Confidence



Inflation

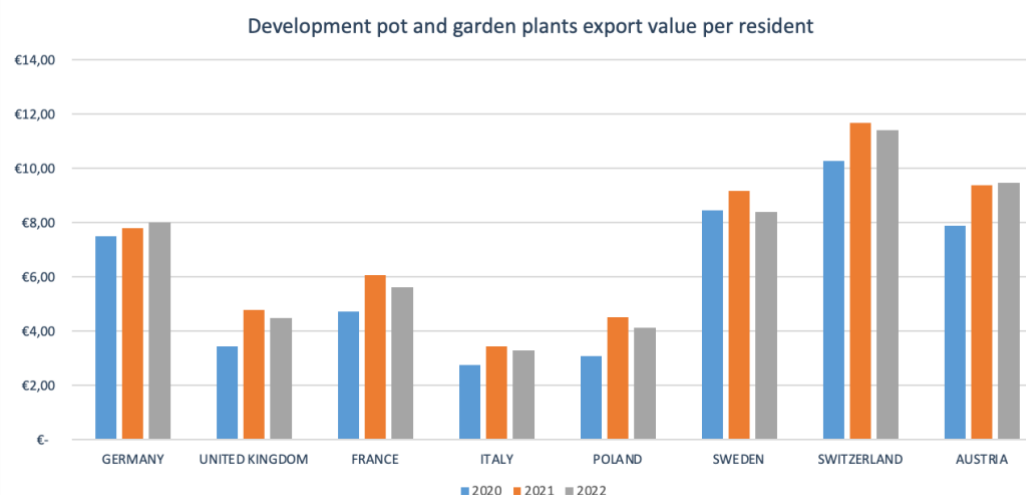
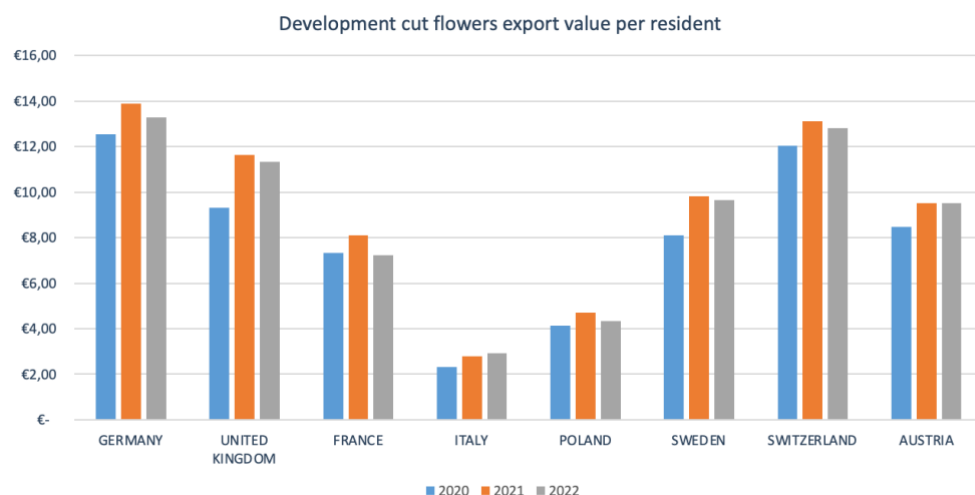
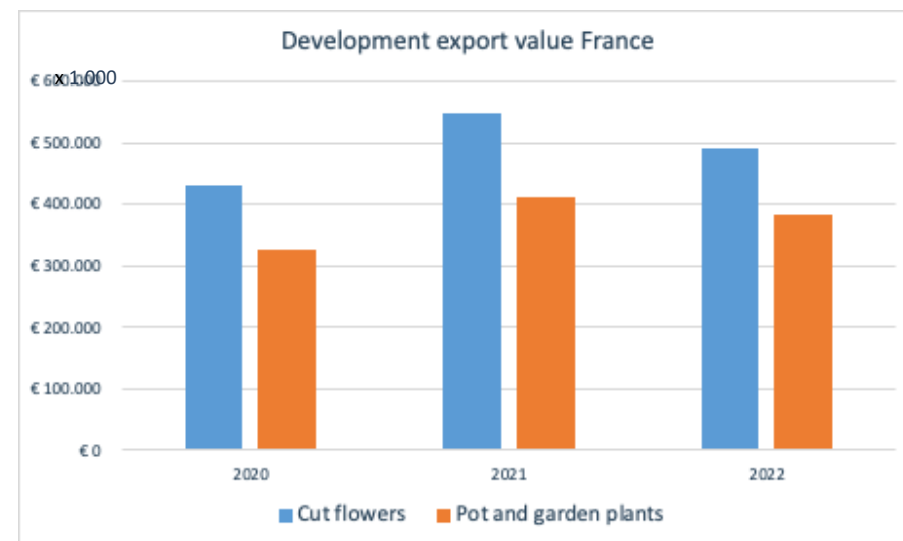


Consumer Price Index

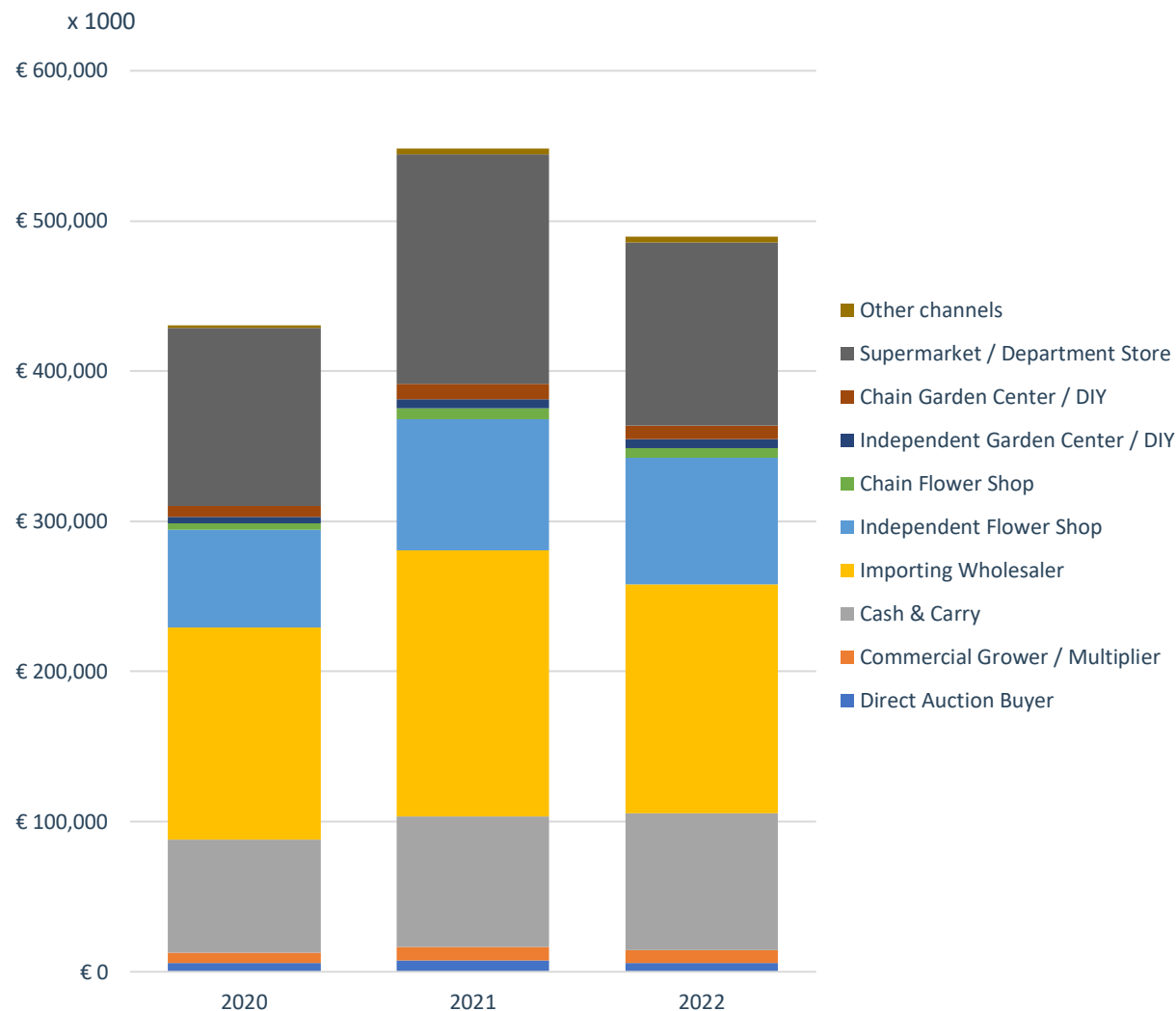


Developments total export value France compared to other countries

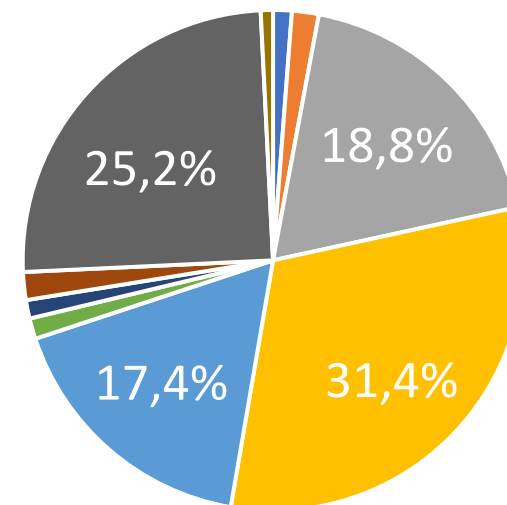
Rank	TOP 18 EXPORT COUNTRIES	TOTAL EXPORT VALUE CUT FLOWERS & POT AND GARDEN PLANTS (x1.000)					
		2017	2018	2019	2020	2021	2022
1	GERMANY	€ 1.727.401	€ 1.675.531	€ 1.666.266	€ 1.602.785	€ 1.805.726	€ 1.767.042
2	UNITED KINGDOM	€ 836.684	€ 825.962	€ 854.835	€ 879.863	€ 1.103.684	€ 1.069.027
3	FRANCE	€ 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 France per sales channel in 2020 – 2022



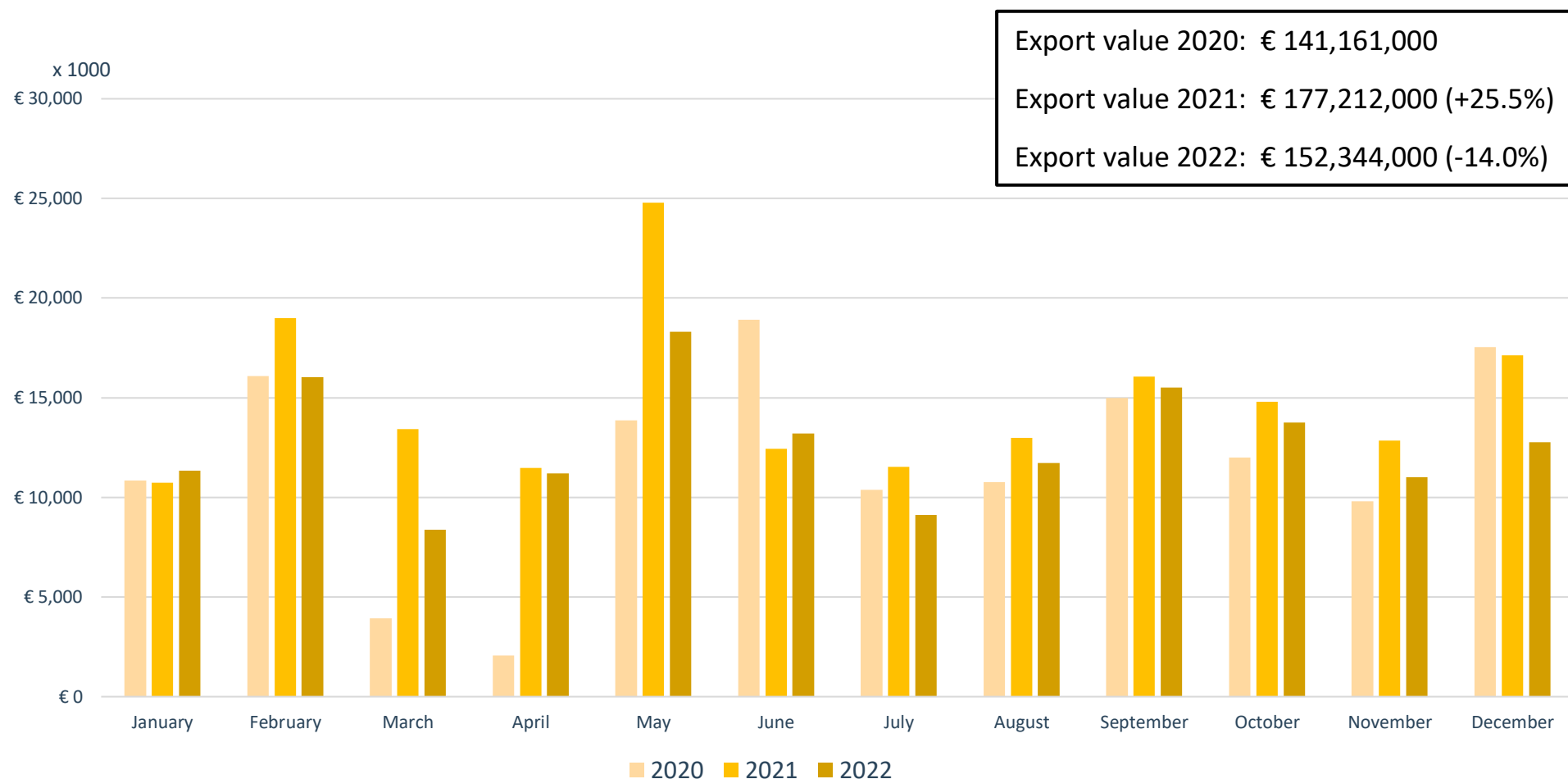
Sales channels France cut flowers 2022



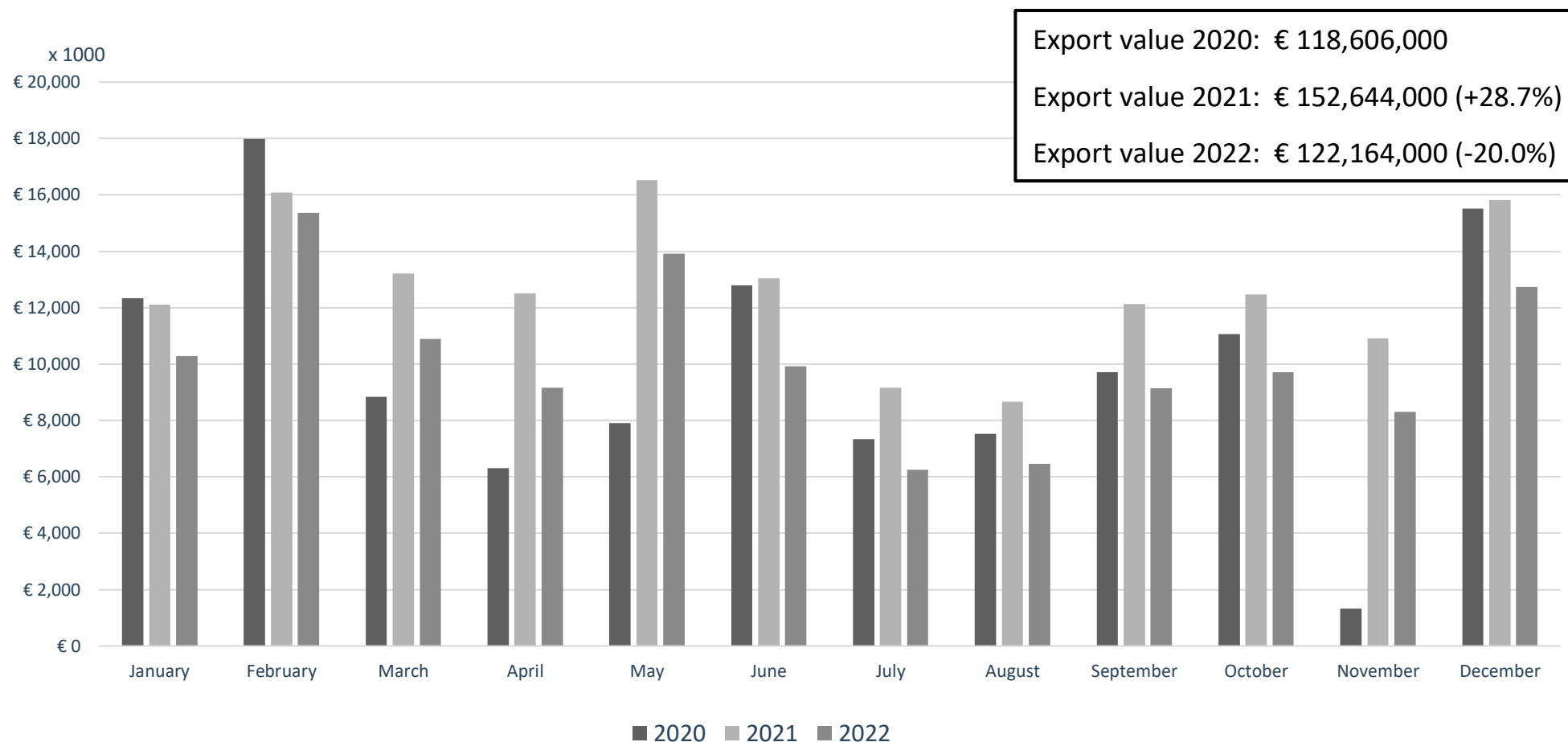
The four largest sales channels for the export of cut flowers are:

1. Importing Wholesaler (31.4%)
2. Supermarket/Department Store (25.2%)
3. Cash & Carry (18.8%)
4. Independent Flower Shop (17.4%)

Largest sales channel for cut flowers: Importing Wholesaler

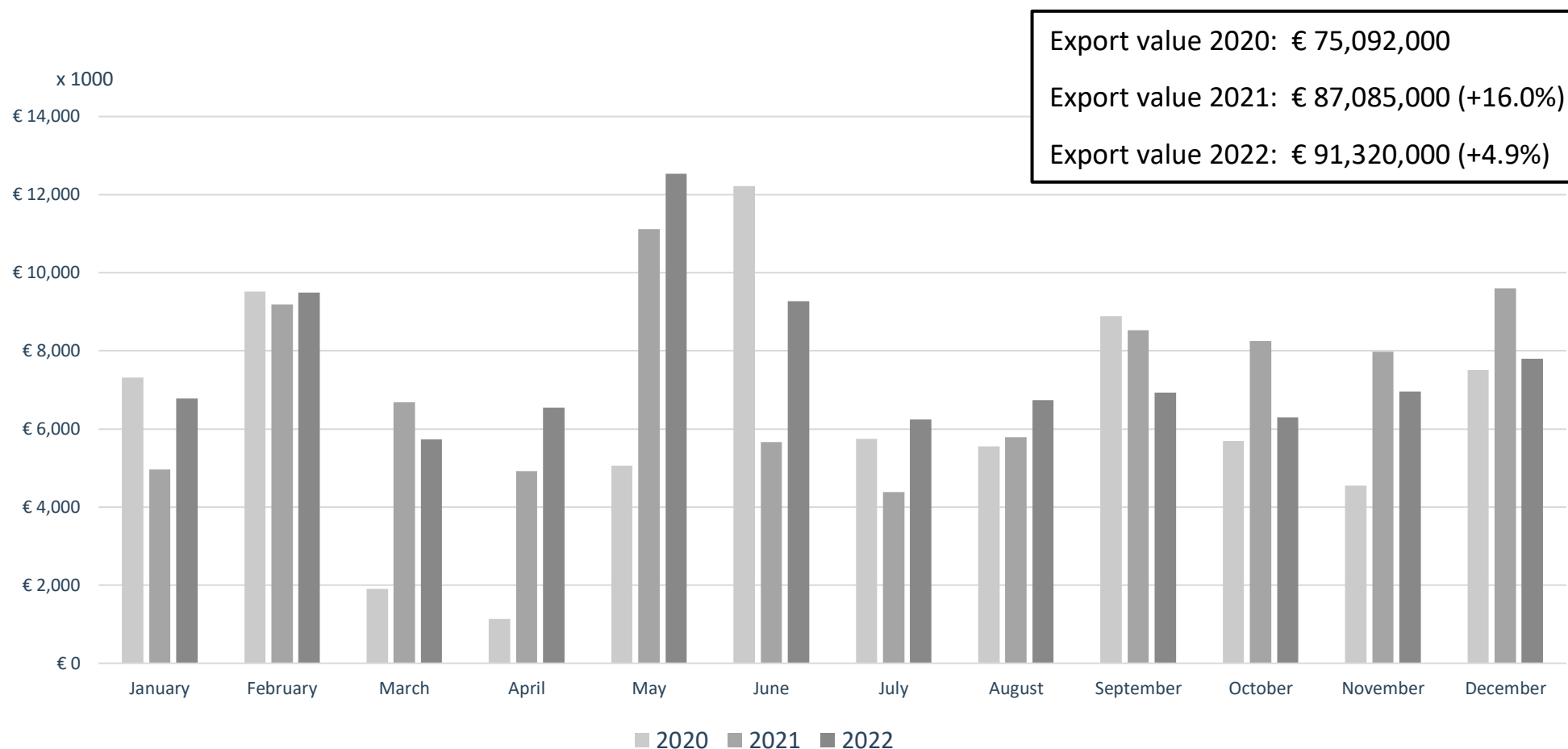


The export value of cut flowers to Importing Wholesaler increased with 7.9% between 2020 and 2022.
In 2021 the export value increased with 25.5% and in 2022 the export value decreased with 14.0%.



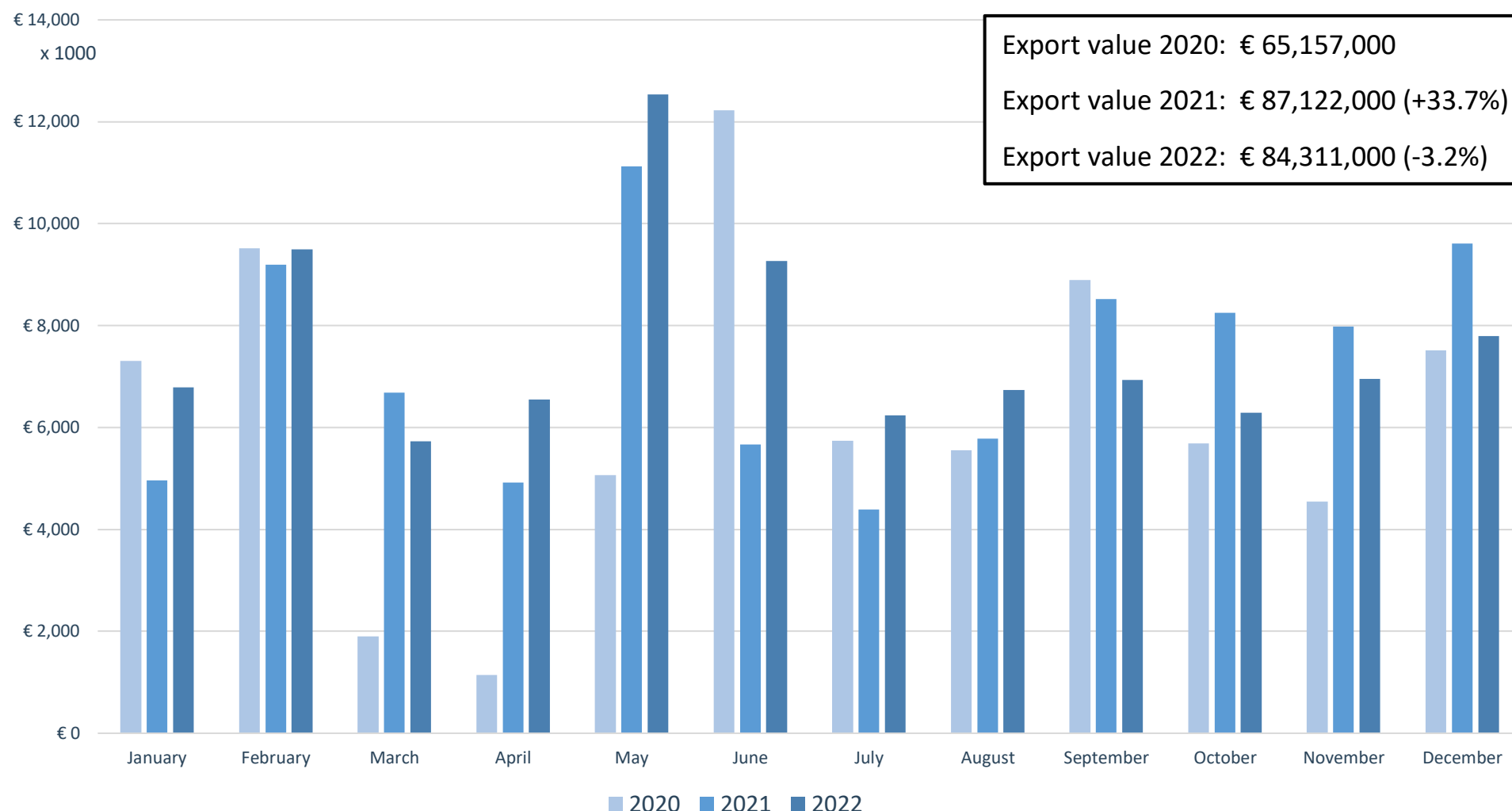
The export value of cut flowers to Supermarket / Department Store increased with 3.0% between 2020 and 2022.
 In 2021 the export value increased with 28.7% and in 2022 it decreased with 20.0%.

Third largest sales channel for cut flowers: Cash & Carry



The export value of cut flowers to Cash & Carry increased with 21.6% between 2020 and 2022.
In 2021 the export value increased with 16.0% and in 2022 the export value increased with 4.9%.

Fourth largest sales channel for cut flowers: Independent Flower Shop



The export value of cut flowers to Independent Flower Shop increased with 29.4% between 2020 and 2022.
In 2021 the export value increased with 33.7% and in 2022 the export value decreased with 3.2%.

Dutch export position cut flowers France

Development Dutch import share cut flowers

FRANCE

	2016	2017	2018	2019	2020	2021	2022
	91,7%	91,4%	92,1%	90,9%	89,9%	87,2%	85,1%

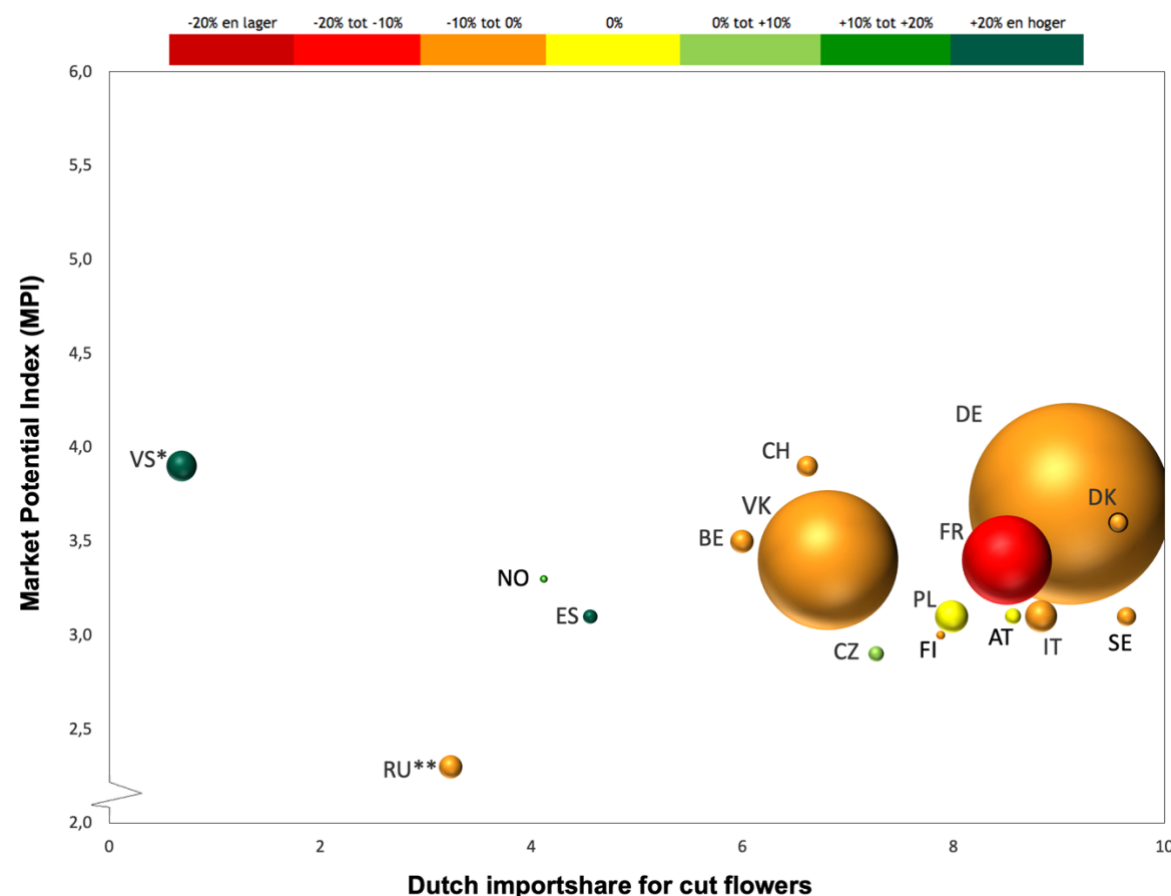
The **vertical axis** illustrates the height of the **market potential**. The higher the globe is positioned in the matrix, the higher country's market potential for international business. The market potential is determined with weighted scores in different dimensions, such as market size, -intensity, -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).

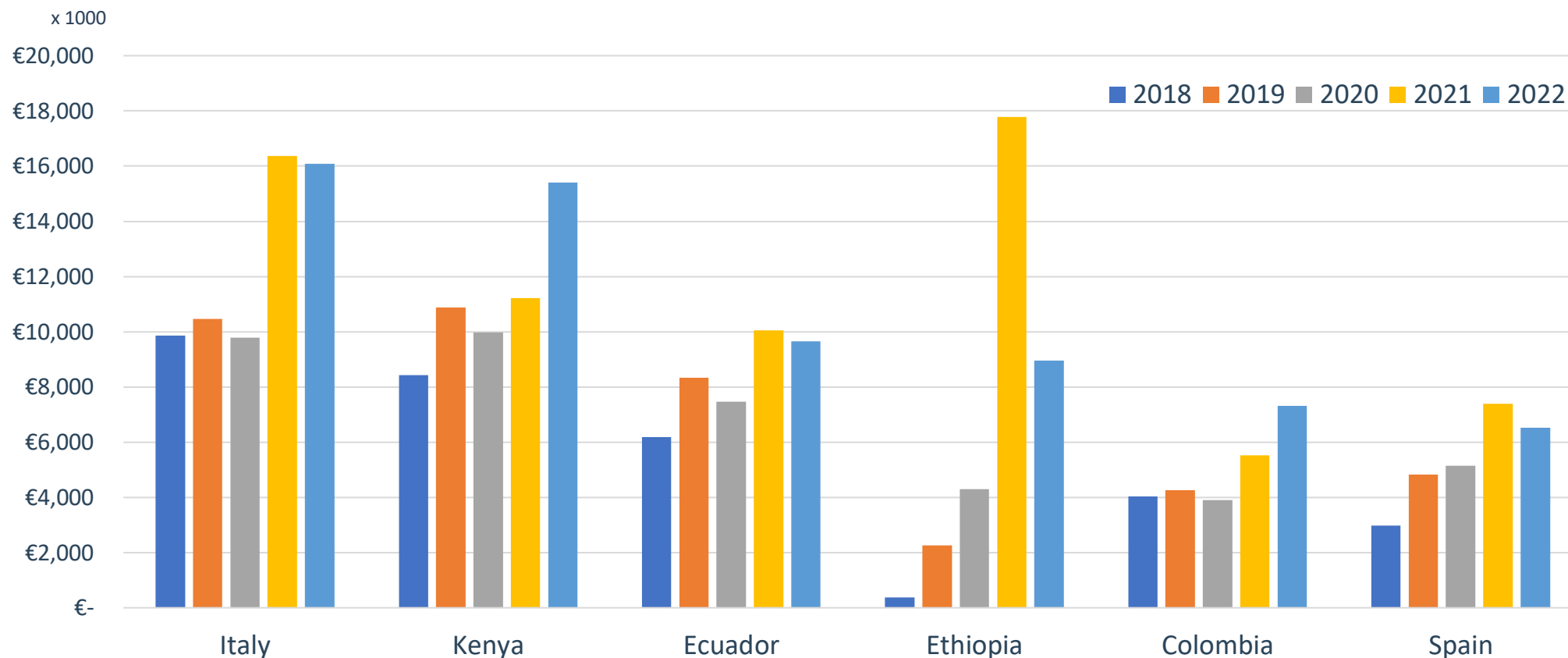
The **colour of the globe** shows the **growth or decline of the export value** (source: Floridata export figures).

Market potential-Export position Matrix 2022



Source: UN Comtrade and Floridata

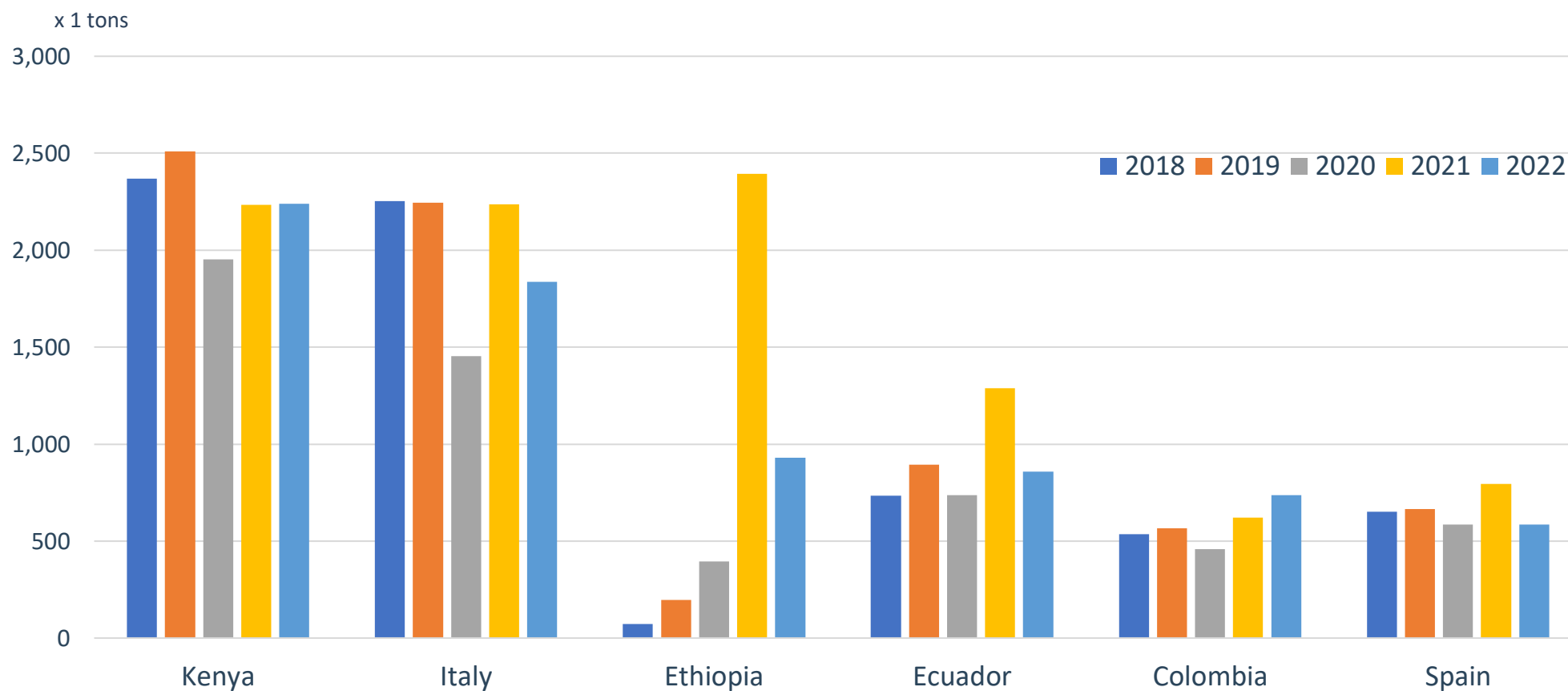
Import value cut flowers France from other countries



Source: UN Comtrade

The import value of cut flowers from Italy (with 64.6%) and Kenya (with 54.5%) increased significantly between 2020 and 2022. Italy and Kenya are the largest import country after the Netherlands. The import value of cut flowers from Ecuador, Ethiopia and Colombia also increased over the same period.

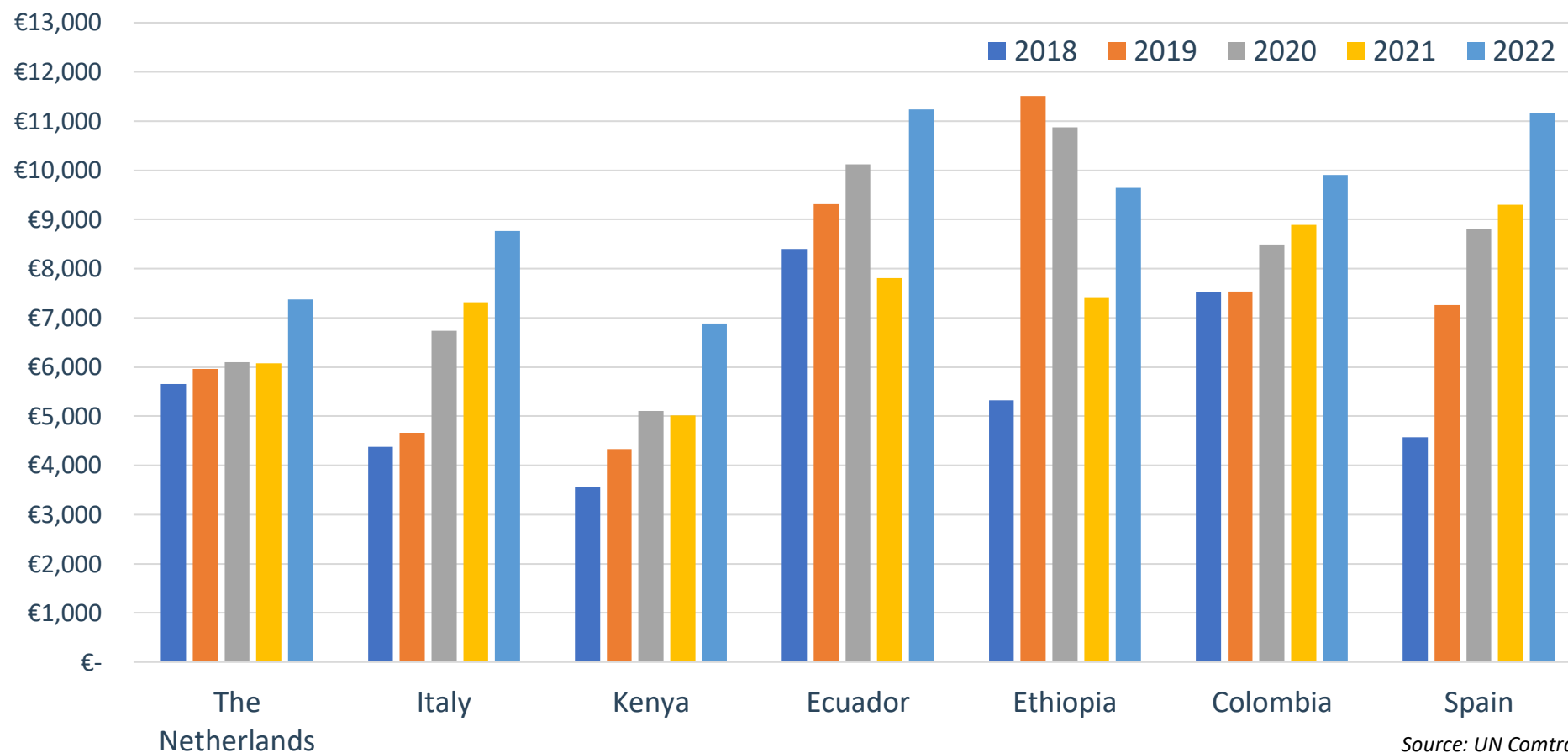
Import volume cut flowers France from other countries



Source: UN Comtrade

The import volume of cut flowers from all countries increased between 2020 and 2022, except for Spain.

Import value per ton cut flowers France



The import value per ton cut flowers from the Netherlands increased with 21.1% between 2020 and 2022. For other countries the import value per ton cut flowers increased over the same period, except for Ethiopia.

Cut flowers France	Import value development	Import volume development	Value per ton development	Conclusion
	2018-2022	2018-2022	2018-2022	
The Netherlands	-1,7%	-24,6%	30,4%	Decreasing import value & decreasing volume → increasing value live cut flowers.
Italy	63,1%	-18,5%	100,2%	Increasing import value & decreasing volume → increasing value live cut flowers.
Kenya	82,7%	-5,5%	93,3%	Increasing import value & decreasing volume → increasing value live cut flowers.
Ecuador	56,3%	16,9%	33,7%	Increasing import value & increasing volume → increasing value live cut flowers.
Ethiopia	2269,6%	1208,5%	81,1%	Increasing import value & increasing volume → increasing value live cut flowers.
Colombia	81,3%	37,7%	31,7%	Increasing import value & increasing volume → increasing value live cut flowers.
Spain	119,2%	-10,3%	144,3%	Increasing import value & decreasing volume → increasing value live cut flowers.

Source: UN Comtrade and Floridata

The value of cut flowers from Italy, Kenya, Ethiopia and Spain increased significantly between 2018-2022.

Development cut flowers per product group and country to France

Dutch import cut flowers per product group to France	Share of Dutch import value per product group to France (source: ITC calculations based on UN Comtrade Statistics)				
	2018	2019	2020	2021	2022
Cut flower others	35,5%	37,6%	38,9%	39,2%	37,7%
Roses	36,1%	34,4%	33,5%	30,5%	31,6%
Dried/bleached/impregnated	13,1%	12,9%	12,3%	12,9%	12,2%
Foliage	5,0%	4,9%	5,4%	5,9%	7,4%
Chysanthemums	3,9%	3,8%	3,6%	4,3%	4,2%
Orchids	2,4%	2,5%	2,3%	2,1%	2,1%
Lilies	2,0%	2,0%	2,1%	2,9%	2,6%
Carnations	2,0%	1,8%	1,9%	2,3%	2,2%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

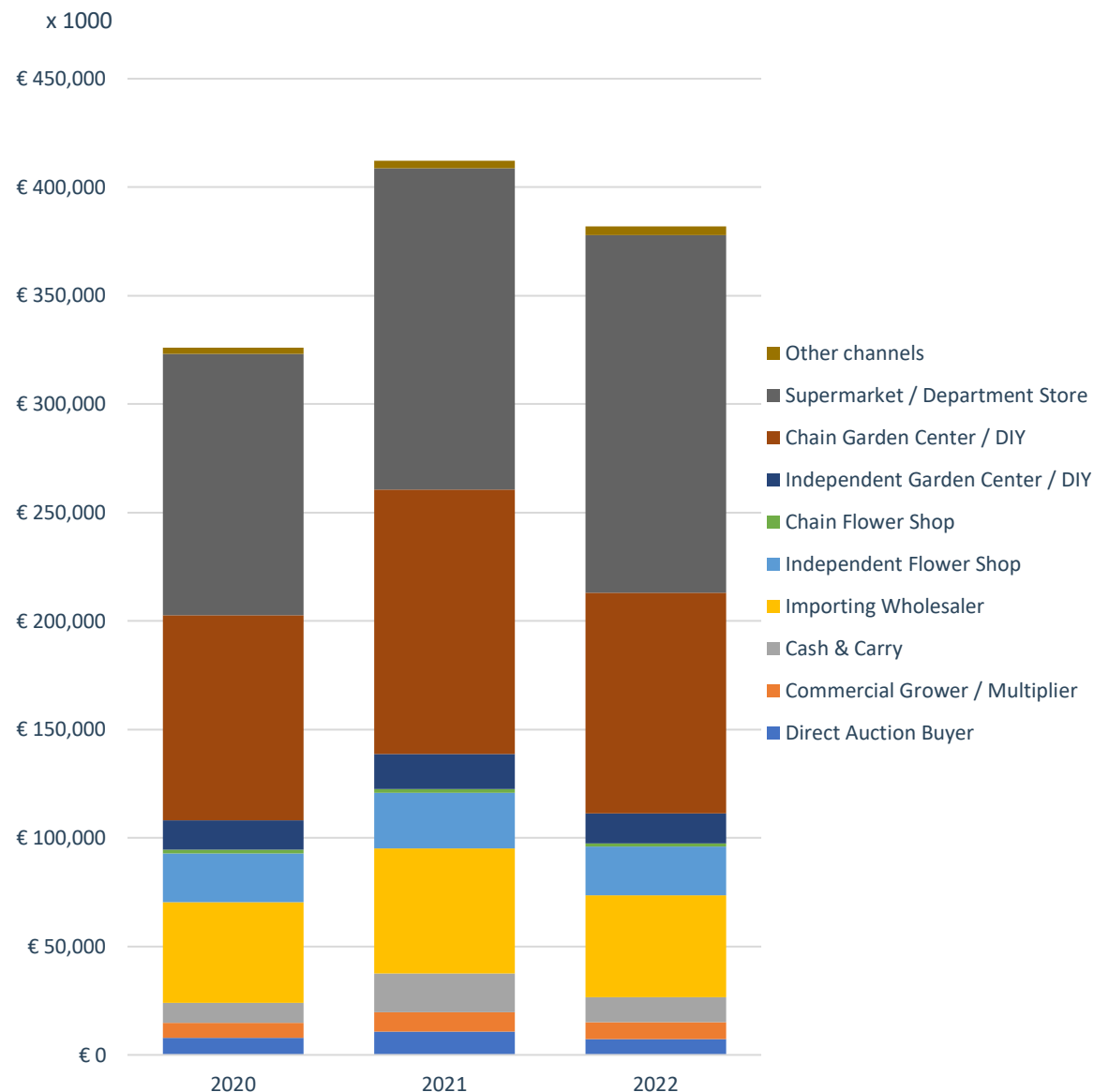
Dutch import value per product group to France (source: Floridata & ITC calculations based on UN Comtrade Statistics)					
2018	2019	2020	2021	2022	2018-2022
€ 172.670	€ 186.091	€ 167.622	€ 214.951	€ 184.350	6,8%
€ 175.732	€ 170.384	€ 144.146	€ 167.053	€ 154.721	-12,0%
€ 63.985	€ 64.018	€ 53.055	€ 70.938	€ 59.960	-6,3%
€ 24.196	€ 24.206	€ 23.232	€ 32.147	€ 36.057	49,0%
€ 18.831	€ 18.606	€ 15.435	€ 23.474	€ 20.774	10,3%
€ 11.696	€ 12.593	€ 9.860	€ 11.410	€ 10.083	-13,8%
€ 9.875	€ 9.921	€ 9.093	€ 15.721	€ 12.779	29,4%
€ 9.602	€ 8.912	€ 8.024	€ 12.452	€ 10.848	13,0%
€ 486.586	€ 494.730	€ 430.465	€ 548.145	€ 489.572	0,6%

Import of roses France	Share of import value roses per country (source: ITC calculations based on UN Comtrade Statistics)				
	2018	2019	2020	2021	2022
Netherlands	90,7%	89,2%	86,9%	81,0%	81,2%
Kenya	4,1%	5,1%	5,4%	4,7%	6,6%
Ethiopia	0,1%	0,8%	2,2%	8,3%	4,1%
Ecuador	2,2%	3,2%	3,1%	3,6%	3,8%
Others	2,8%	1,8%	2,4%	2,5%	4,3%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

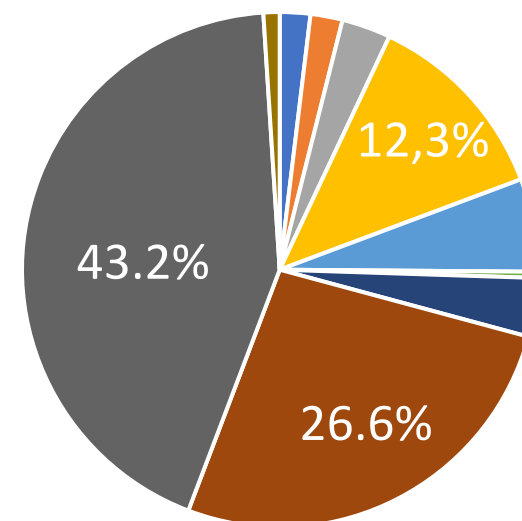
Import value of roses per country (source: Floridata & ITC calculations based on UN Comtrade Statistics)					
2018	2019	2020	2021	2022	2018-2022
€ 175.732	€ 170.384	€ 144.146	€ 167.053	€ 154.721	-12,0%
€ 8.010	€ 9.687	€ 8.924	€ 9.653	€ 12.604	57,4%
€ 268	€ 1.546	€ 3.592	€ 17.107	€ 7.894	2845,5%
€ 4.340	€ 6.107	€ 5.196	€ 7.425	€ 7.185	65,6%
€ 5.413	€ 3.383	€ 3.929	€ 5.107	€ 8.222	51,9%
€ 193.763	€ 191.107	€ 165.787	€ 206.345	€ 190.626	-1,6%

The value of cut flowers increased between 2018-2022 for all product groups, except for roses, orchids, and dried/bleached/impregnated. The value of roses from Ethiopia significantly increased over the same period.

Pot and garden plants export value to France per sales channel in 2020 – 2022



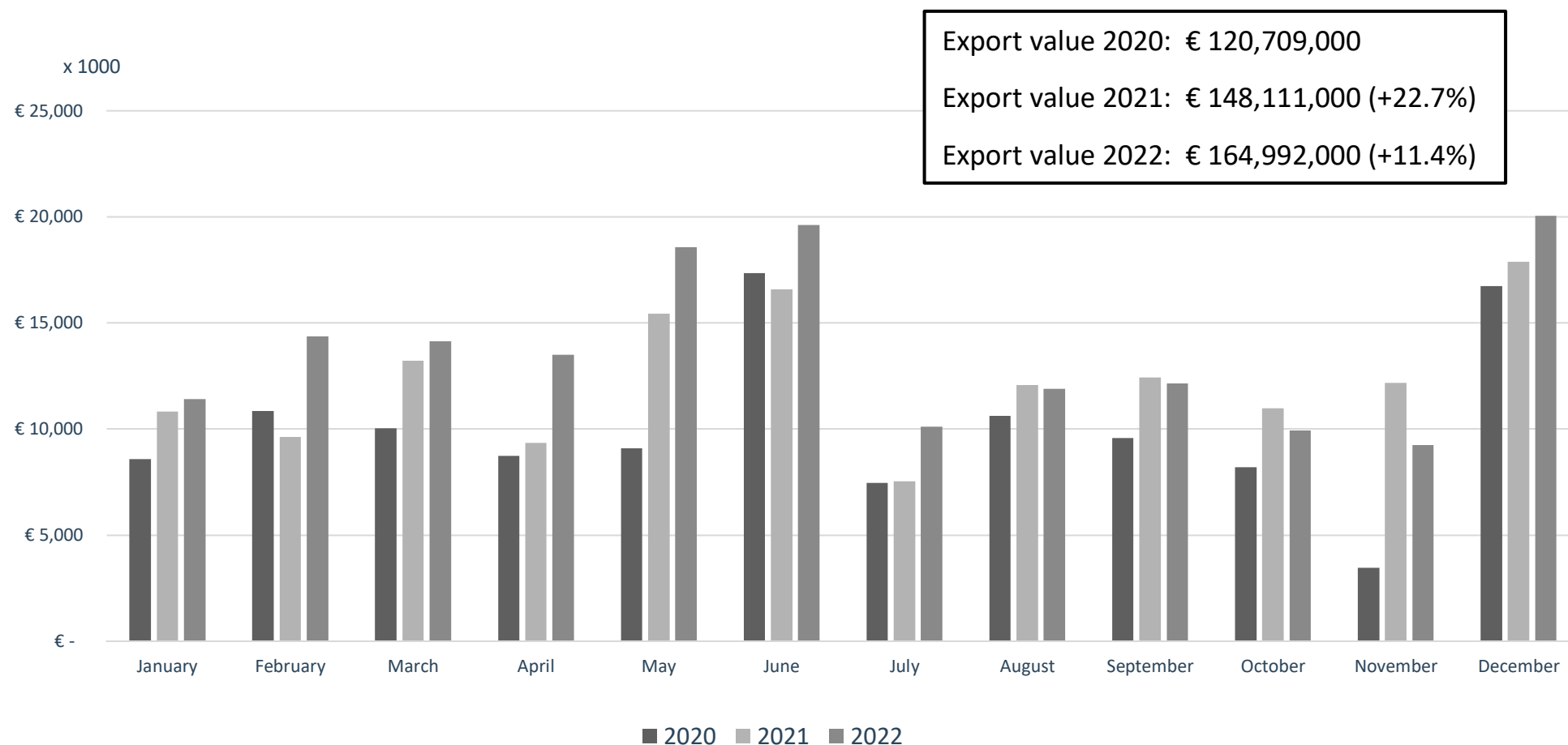
Sales channels France pot and garden plants 2022



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

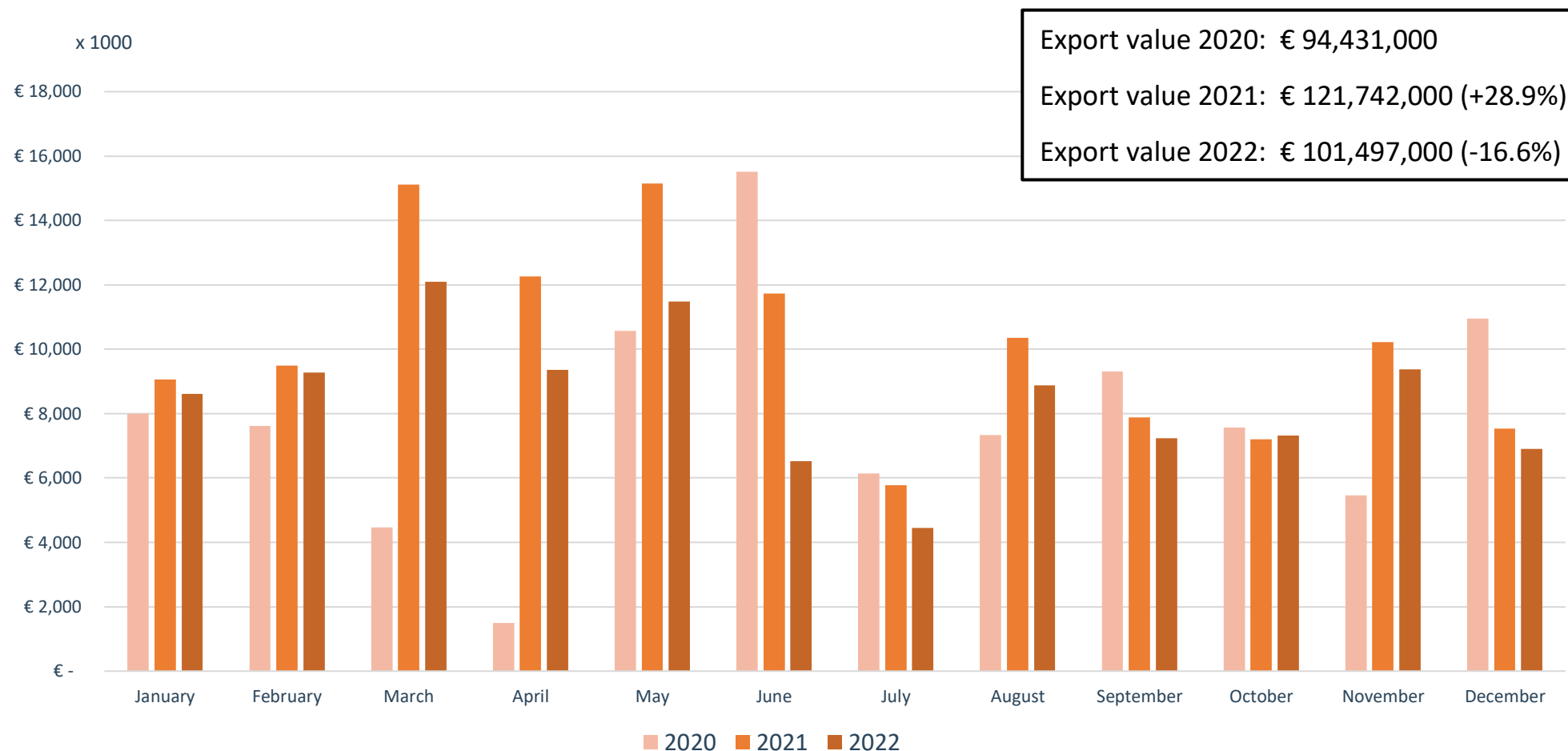
1. Supermarket / Department Store (43.2%)
2. Chain Garden Center / DIY (26.6%)
3. Importing Wholesaler (12.3%)

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



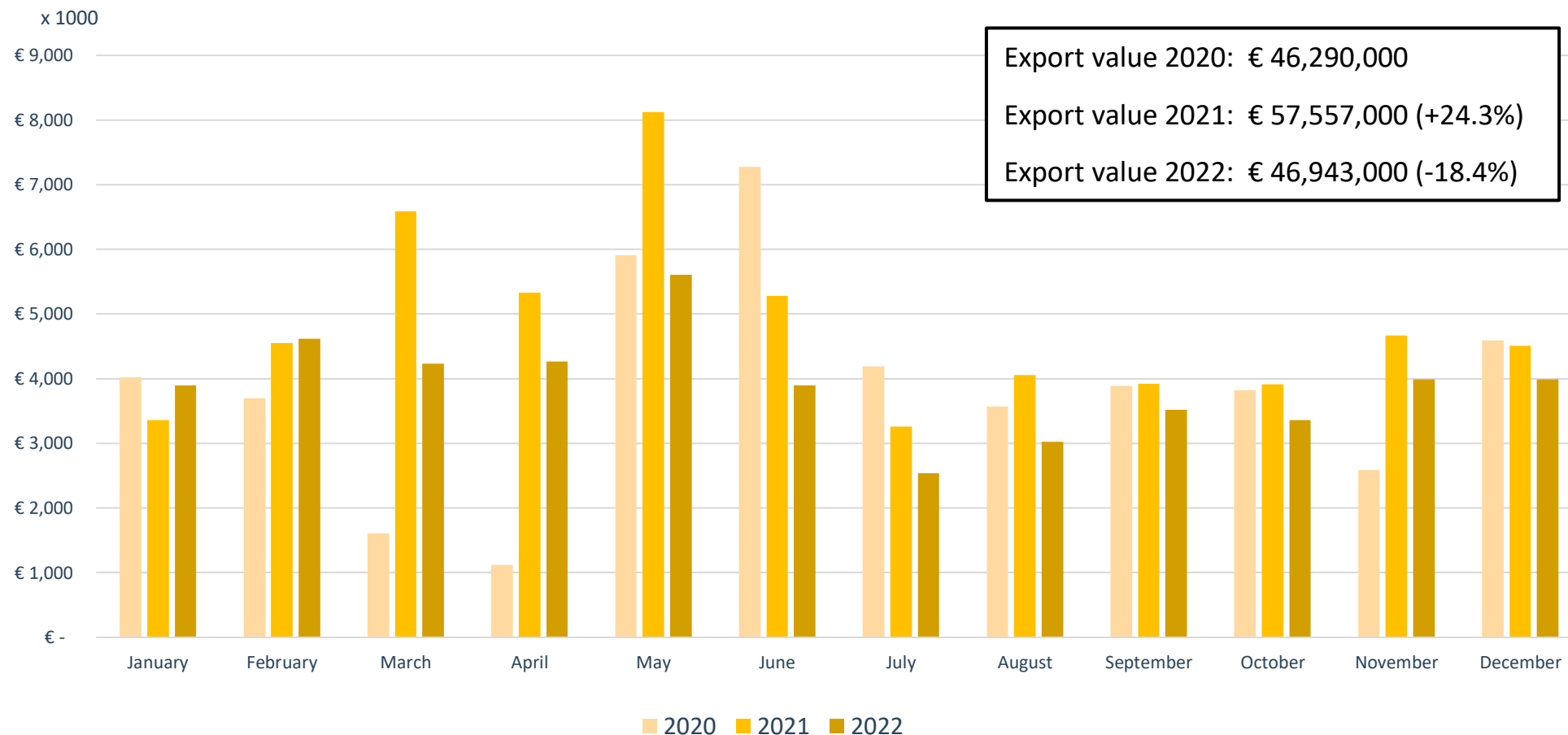
The export value of pot and garden plants to Supermarket / Department Store increased between 2020 and 2022 with 36.7%. In 2021 the export value increased with 22.7% and in 2022 the export value increased with 11.4%.

Second 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 with 7.5% between 2020 and 2022. In 2021 the export value increased with 28.9% and in 2022 the export value decreased with 16.6%.

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



The export value of pot and garden plants to Importing Wholesaler increased with 1.4% between 2020 and 2022. In 2021 the export value increased with 24.3% and in 2022 the export value decreased with 18.4%.

Development Dutch import share live plants

FRANCE

	2016	2017	2018	2019	2020	2021	2022
	48,9%	48,1%	47,8%	48,8%	49,8%	49,1%	46,5%

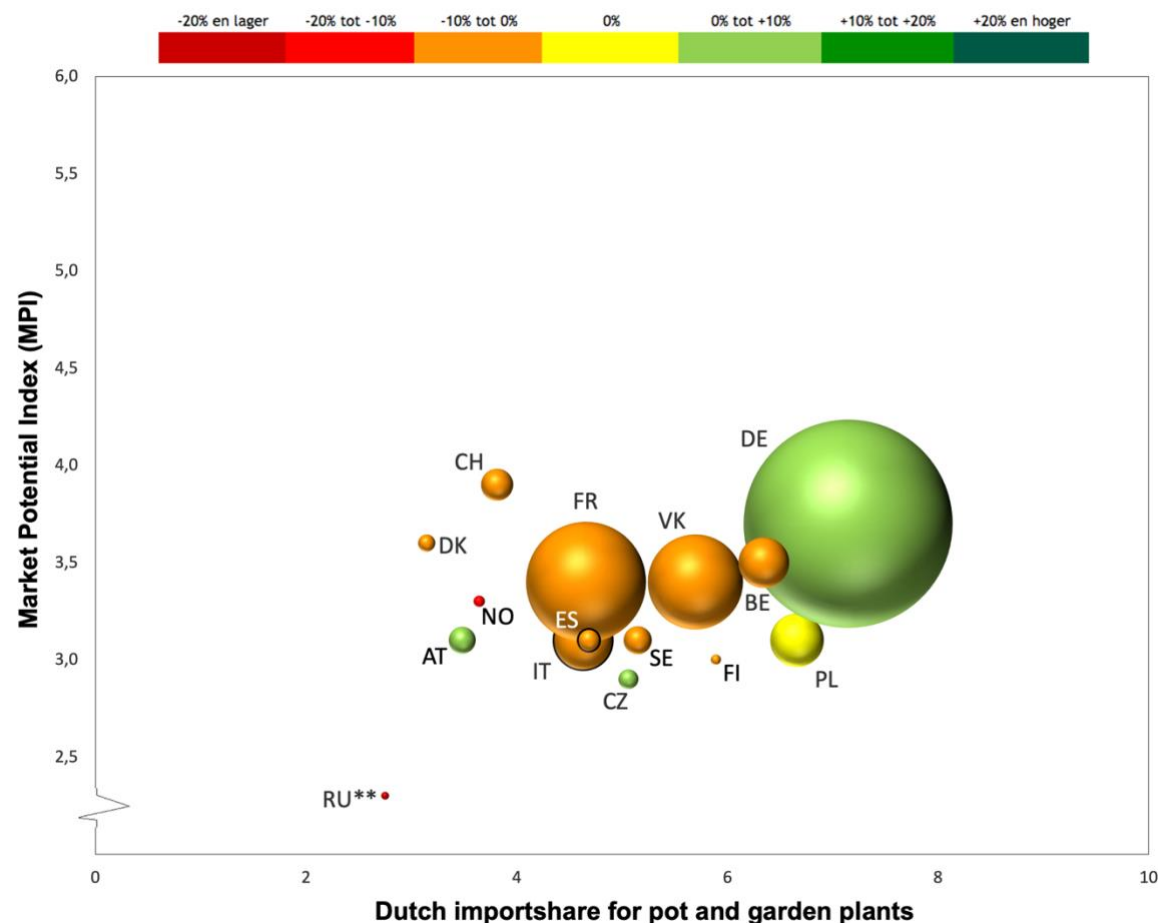
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On the **horizontal axis** the **Dutch export position** of the concerning country is shown. The Dutch import share is expressed in a value between 0 and 10. Meaning, the further the globe is positioned on the right, the larger the total import share 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).

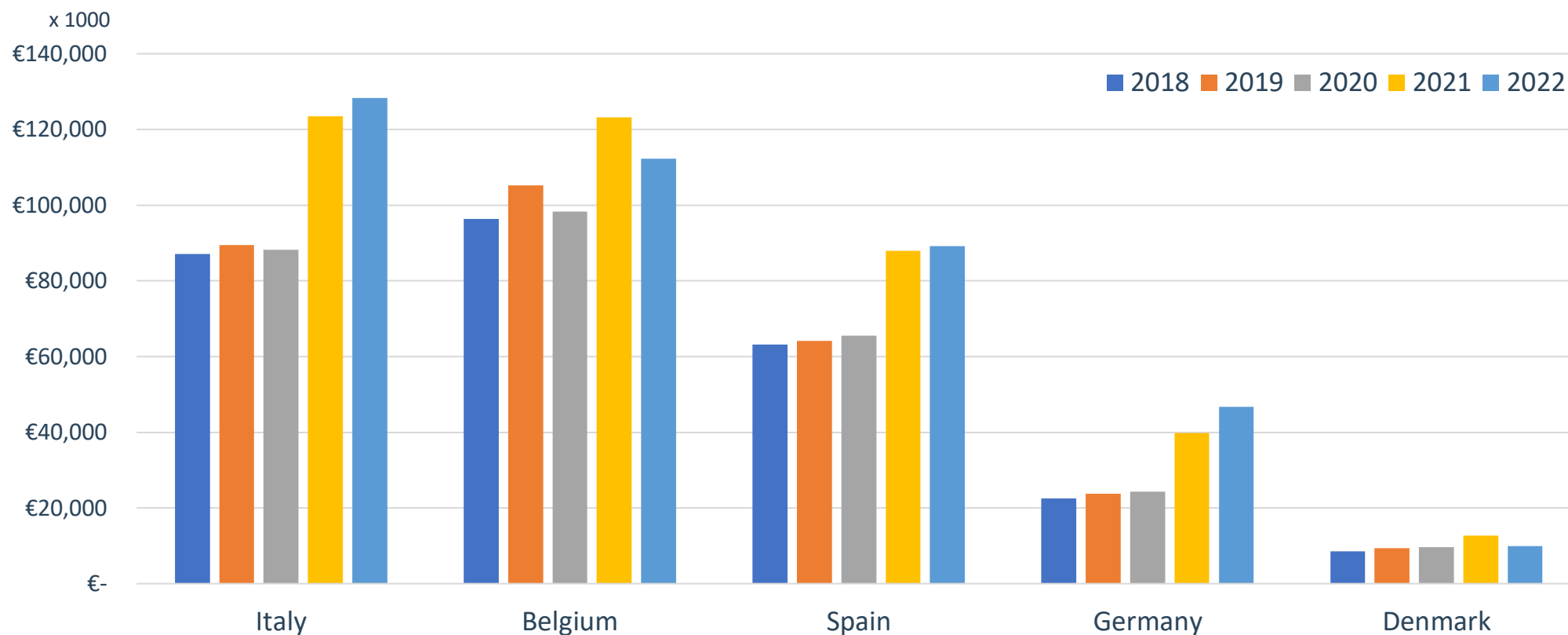
The **colour of the globe** shows the **growth or decline of the export value** (source: Floridata export figures).

Market potential-Export position Matrix 2022



Source: UN Comtrade and Floridata

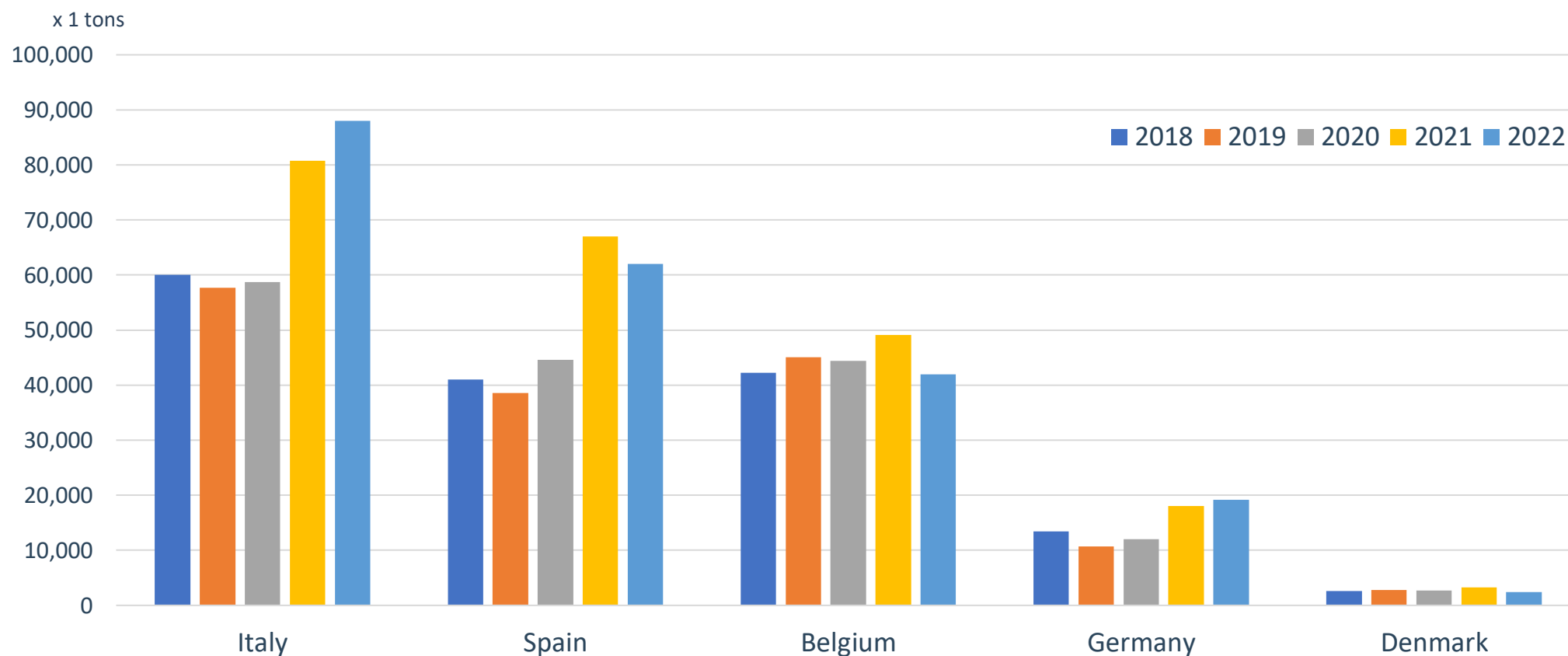
Import value live plants France from other countries



Source: UN Comtrade

The import value of live plants from Italy increased with 45.3% and for Belgium 14.2% between 2020 and 2022. Belgium, Italy and Spain are the largest import countries after the Netherlands. The import value of live plants from all countries increased over the same period.

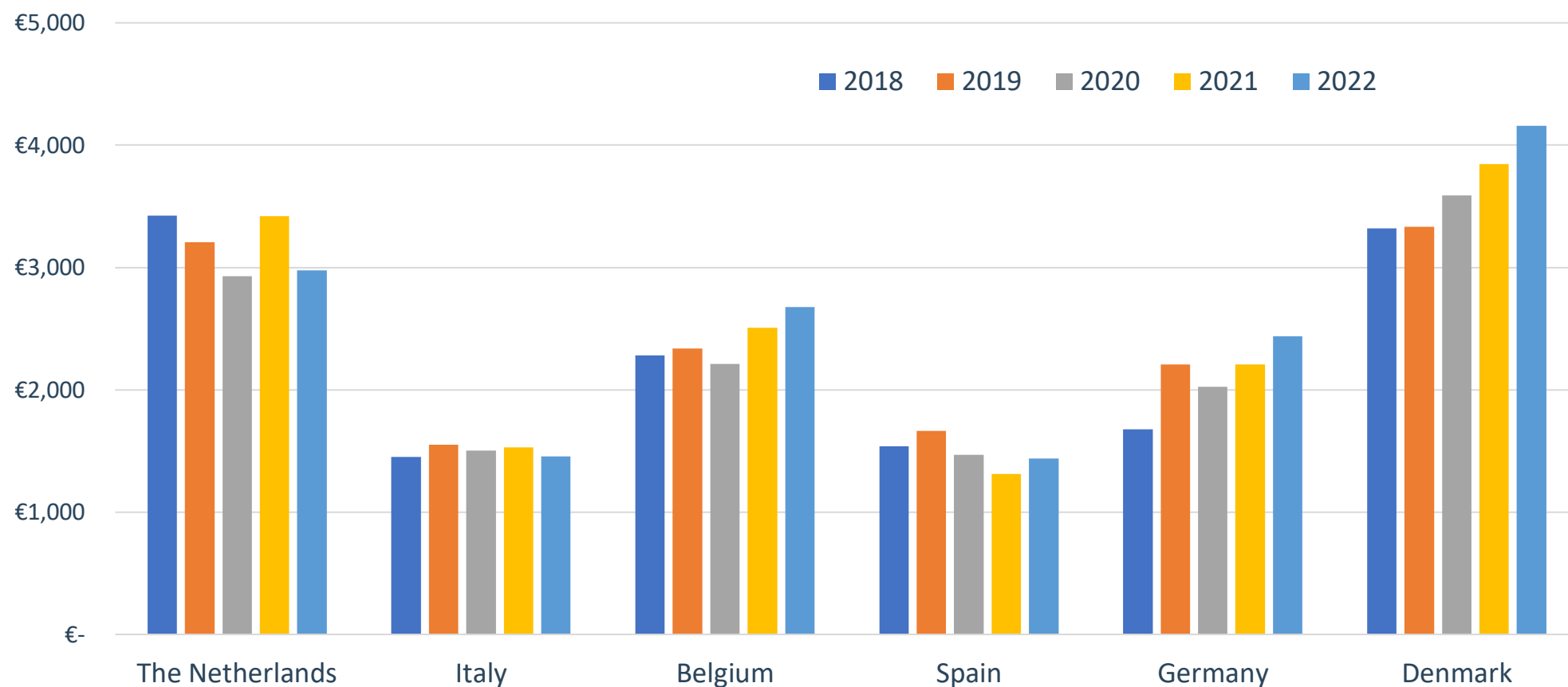
Import volume live plants France from other countries



Source: UN Comtrade

The import volume of live plants from Italy increased with 50.0% between 2020 and 2022. From Spain it increased with 39.2% and from Belgium it decreased with 5.6% over the same period.

Import value per ton live plants France



Source: UN Comtrade

The import value per ton of live plants from The Netherlands increased with 1.8% between 2020 and 2022. From Italy and Spain, the value per ton of live plants decreased over the same period.

Live plants France	Import value development	Import volume development	Value per ton development	Conclusion
	2018-2022	2018-2022	2018-2022	
The Netherlands	24,1%	42,6%	-13,0%	Increasing import value & increasing volume → decreasing value live plants.
Italy	47,1%	51,4%	0,3%	Increasing import value & increasing volume → increasing value live plants.
Belgium	16,4%	-0,8%	17,4%	Increasing import value & decreasing volume → increasing value live plants.
Spain	41,3%	51,4%	-6,6%	Increasing import value & increasing volume → decreasing value live plants.
Germany	106,7%	42,4%	45,1%	Increasing import value & increasing volume → increasing value live plants.
Denmark	16,0%	-7,4%	25,3%	Increasing import value & decreasing volume → increasing value live plants.

Source: UN Comtrade and Floridata

The value of live plants from the Netherlands and Spain decreased during the period 2018-2022.

Development live plants per product group and country to France

Dutch import plants per product group to France	Share of Dutch import value per product group to France (source: ITC calculations based on UN Comtrade Statistics)				
	2018	2019	2020	2021	2022
Indoor flowering plants	39,6%	37,5%	37,2%	33,4%	31,1%
Live indoor green plants and cacti	30,3%	32,4%	31,6%	31,5%	30,5%
Live outdoor plants	19,8%	19,5%	19,4%	23,4%	24,1%
Vegetables and strawberryplants	4,7%	5,0%	5,0%	5,3%	6,6%
Roses	3,4%	3,2%	3,9%	3,4%	3,5%
Edible fruit or nut trees/shrubs	1,7%	2,1%	2,6%	2,6%	3,8%
Rhododendrons and azaleas	0,6%	0,3%	0,4%	0,4%	0,3%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

Dutch import value per product group to France (source: Floridata & ITC calculations based on UN Comtrade Statistics)					
2018	2019	2020	2021	2022	2018-2022
€ 117.136	€ 119.386	€ 121.357	€ 137.605	€ 118.678	1,3%
€ 89.510	€ 103.416	€ 103.165	€ 129.833	€ 116.290	29,9%
€ 58.651	€ 62.147	€ 63.205	€ 96.609	€ 92.133	57,1%
€ 13.775	€ 15.941	€ 16.147	€ 21.948	€ 25.273	83,5%
€ 10.080	€ 10.145	€ 12.606	€ 13.849	€ 13.460	33,5%
€ 4.972	€ 6.601	€ 8.516	€ 10.715	€ 14.697	195,6%
€ 1.674	€ 1.079	€ 1.150	€ 1.522	€ 1.287	-23,1%
€ 295.798	€ 318.715	€ 326.146	€ 412.080	€ 381.818	29,1%

Import of flowering indoor plants France	Share of import value indoor flowering plants per country (source: ITC calculations based on UN Comtrade Statistics)				
	2018	2019	2020	2021	2022
Netherlands	68,5%	70,0%	72,7%	68,6%	67,8%
Belgium	14,1%	14,1%	12,5%	12,4%	11,1%
Spain	8,0%	7,2%	6,6%	7,5%	7,8%
Italy	4,4%	4,2%	3,7%	4,7%	5,5%
Others	4,9%	4,5%	4,5%	6,7%	7,8%
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)					
2018	2019	2020	2021	2022	2018-2022
€ 117.136	€ 119.386	€ 121.357	€ 137.605	€ 118.678	1,3%
€ 24.095	€ 24.027	€ 20.843	€ 24.938	€ 19.401	-19,5%
€ 13.742	€ 12.220	€ 10.996	€ 15.121	€ 13.705	-0,3%
€ 7.491	€ 7.165	€ 6.224	€ 9.479	€ 9.662	29,0%
€ 8.426	€ 7.689	€ 7.474	€ 13.450	€ 13.693	62,5%
€ 170.890	€ 170.487	€ 166.894	€ 200.593	€ 175.139	2,5%

The value of all product groups increased between 2018-2022.

The value of indoor flowering plants from Belgium decreased over the same period.

Import of green indoor plants and cacti France	Share of import value green indoor plants and cacti per country (source: ITC calculations based on UN Comtrade Statistics)				
	2018	2019	2020	2021	2022
Netherlands	74,0%	74,5%	73,9%	73,1%	69,9%
Belgium	14,2%	14,7%	14,6%	14,1%	13,2%
Spain	3,9%	3,3%	3,7%	3,6%	3,7%
Italy	2,5%	2,6%	2,6%	2,4%	2,4%
Denmark	2,6%	2,3%	2,1%	2,3%	2,3%
Others	2,8%	2,7%	3,0%	4,5%	8,4%
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)					
2018	2019	2020	2021	2022	2018-2022
€ 89.510	€ 103.416	€ 103.165	€ 129.833	€ 116.290	29,9%
€ 17.129	€ 20.339	€ 20.397	€ 25.045	€ 22.025	28,6%
€ 4.683	€ 4.538	€ 5.175	€ 6.332	€ 6.194	32,3%
€ 3.031	€ 3.615	€ 3.697	€ 4.232	€ 4.046	33,5%
€ 3.189	€ 3.198	€ 2.958	€ 4.074	€ 3.869	21,3%
€ 3.409	€ 3.689	€ 4.205	€ 8.039	€ 13.907	307,9%
€ 120.951	€ 138.795	€ 139.597	€ 177.555	€ 166.331	37,5%

Import of outdoor plants France	Share of import value outdoor plants per country (source: ITC calculations based on UN Comtrade Statistics)				
	2018	2019	2020	2021	2022
Netherlands	37,7%	37,7%	39,1%	42,8%	41,3%
Belgium	18,5%	18,2%	17,1%	16,7%	16,4%
Spain	11,4%	11,8%	11,7%	12,7%	14,2%
Germany	6,9%	7,0%	7,4%	9,2%	10,5%
Italy	10,5%	11,1%	10,8%	10,6%	10,0%
Others	15,1%	14,2%	14,0%	8,0%	7,6%
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)					
2018	2019	2020	2021	2022	2018-2022
€ 58.651	€ 62.147	€ 63.205	€ 96.609	€ 92.133	57,1%
€ 28.806	€ 30.082	€ 27.605	€ 37.583	€ 36.703	27,4%
€ 17.651	€ 19.519	€ 18.855	€ 28.557	€ 31.732	79,8%
€ 10.678	€ 11.535	€ 11.957	€ 20.687	€ 23.489	120,0%
€ 16.281	€ 18.243	€ 17.405	€ 23.989	€ 22.272	36,8%
€ 23.399	€ 23.458	€ 22.687	€ 18.059	€ 16.952	-27,6%
€ 155.466	€ 164.984	€ 161.714	€ 225.484	€ 223.281	43,6%

The value of green indoor plants and cacti from all other countries increased between 2018-2022.
The value of outdoor plants from most other countries increased over the same period.