

FLORIDATA[®] MARKET REPORT FRANCE

Period 2016-2020

- France is the 3rd export country for the Netherlands
- Floridata monitors 24,290 debtors in France
- Export growth cut flowers, period 2016-2020: **-14.7%**
- Export growth pot and garden plants, period 2016-2020: **+19.8%**



Edition: September 2021

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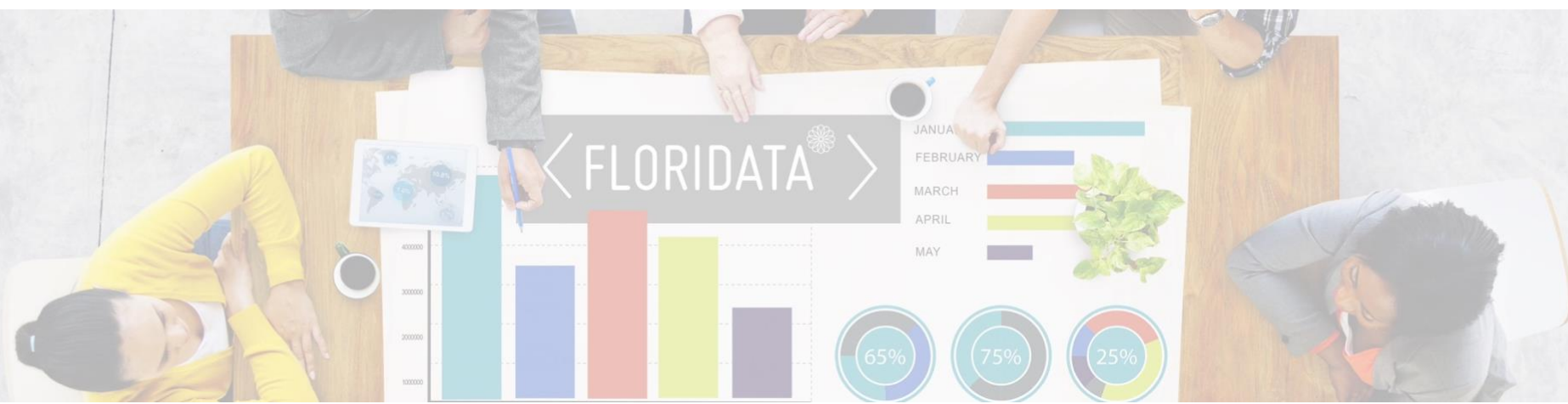


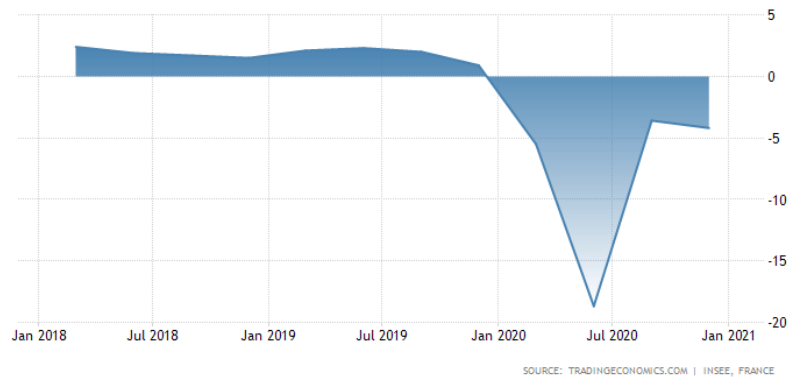
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Economical & demographical developments 2018 – 2020

Economic growth – (based on GDP)



Demographics

	2018	2019	2020
Population (mln.)	66,97	67,06	67,89
Gross Domestic Product (bln.)	\$2787	\$2751	\$2603
Unemployment rate	9,1%	8,6%	8,0%

Population density



Inflation



Consumer confidence

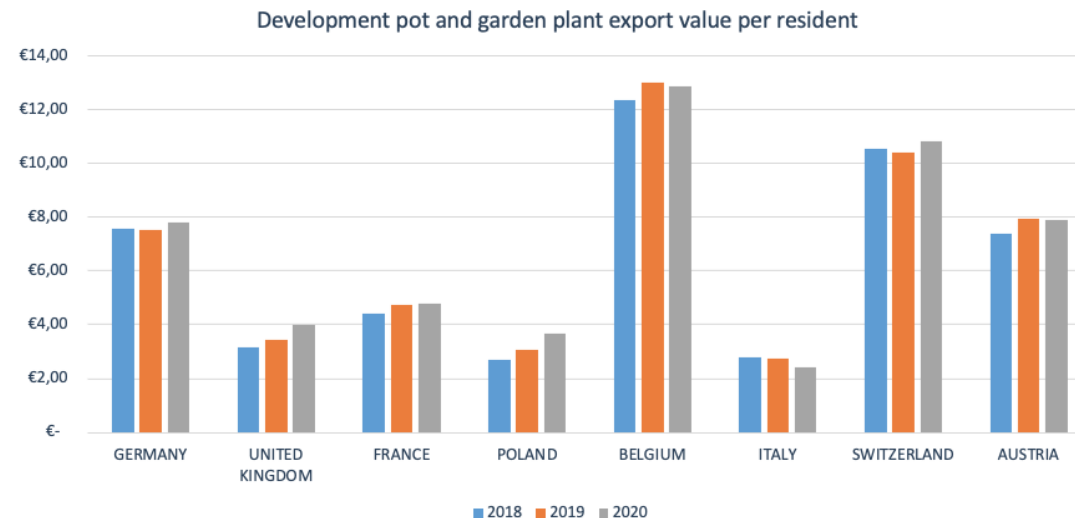
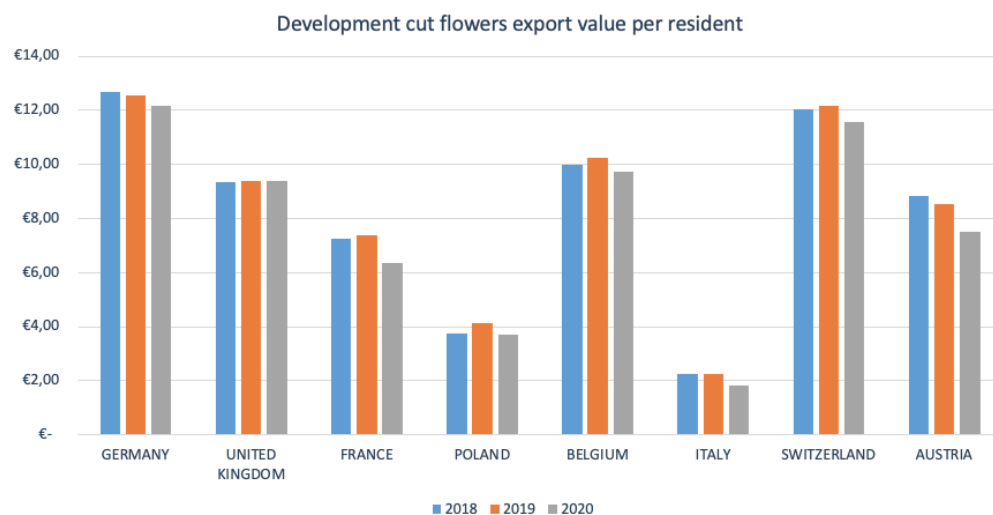
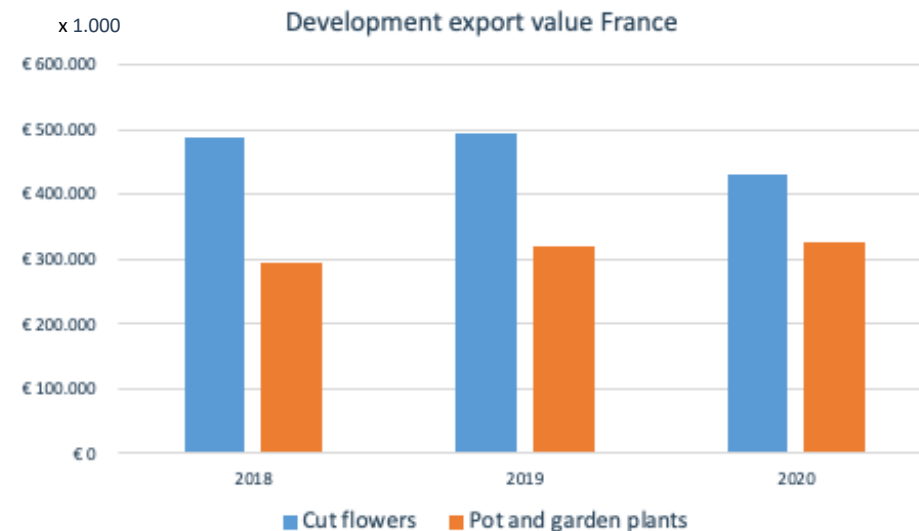


Age distribution

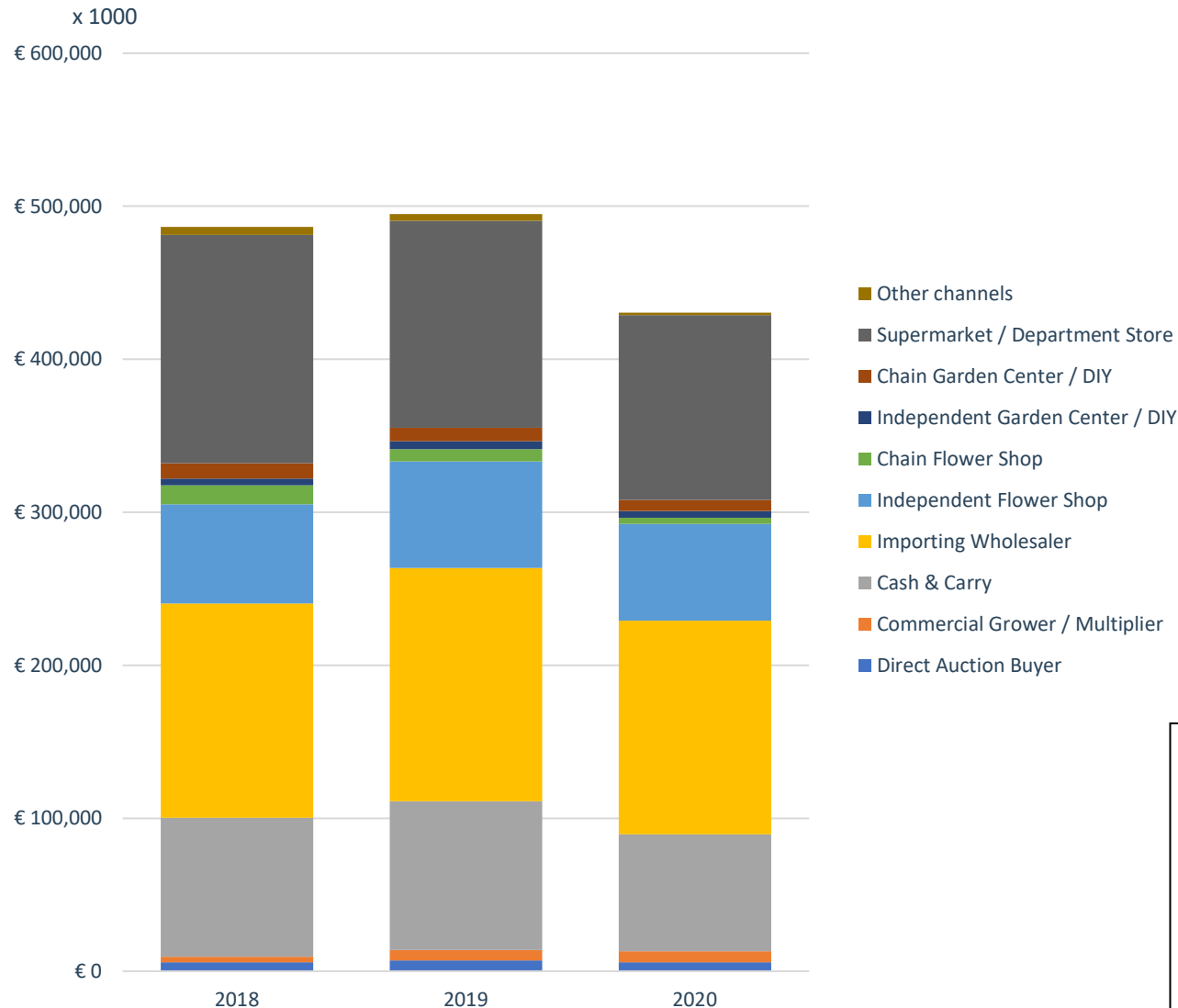


Developments total export value France compared to other countries

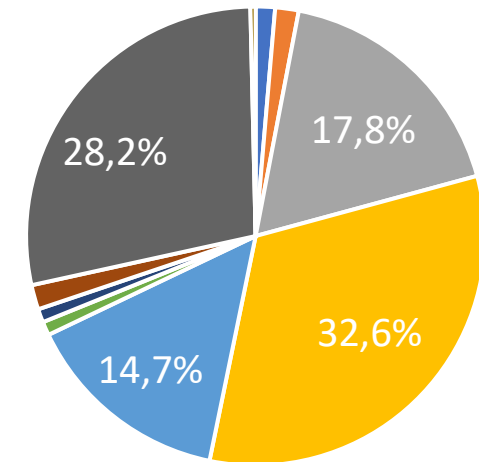
Rank	TOP 18 EXPORT COUNTRIES	TOTAL EXPORT VALUE CUT FLOWERS & POT AND GARDEN PLANTS (x1.000)					
		2015	2016	2017	2018	2019	2020
1	GERMANY	€ 1.557.205	€ 1.660.516	€ 1.727.401	€ 1.675.531	€ 1.666.266	€ 1.602.785
2	UNITED KINGDOM	€ 925.133	€ 883.065	€ 836.684	€ 825.962	€ 854.835	€ 879.863
3	FRANCE	€ 752.975	€ 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 France per sales channel in 2018 – 2020



Sales channels France cut flowers 2020

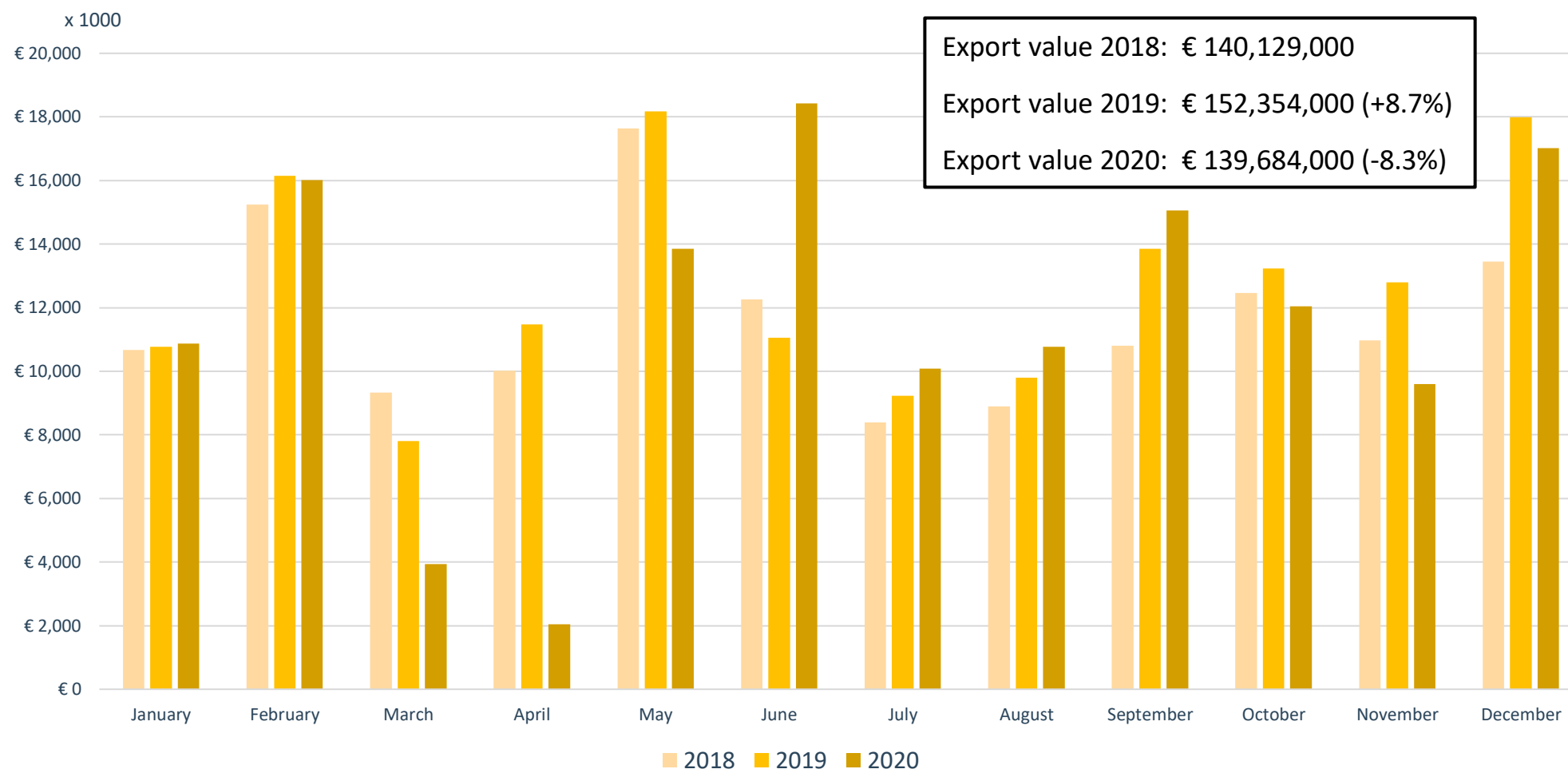


The four largest sales channels for the export of cut flowers are:

1. Importing Wholesaler (32.6%)
2. Supermarket/Department Store (28.2%)
3. Cash & Carry (17.8%)
4. Independent Flower Shop (14.7%)

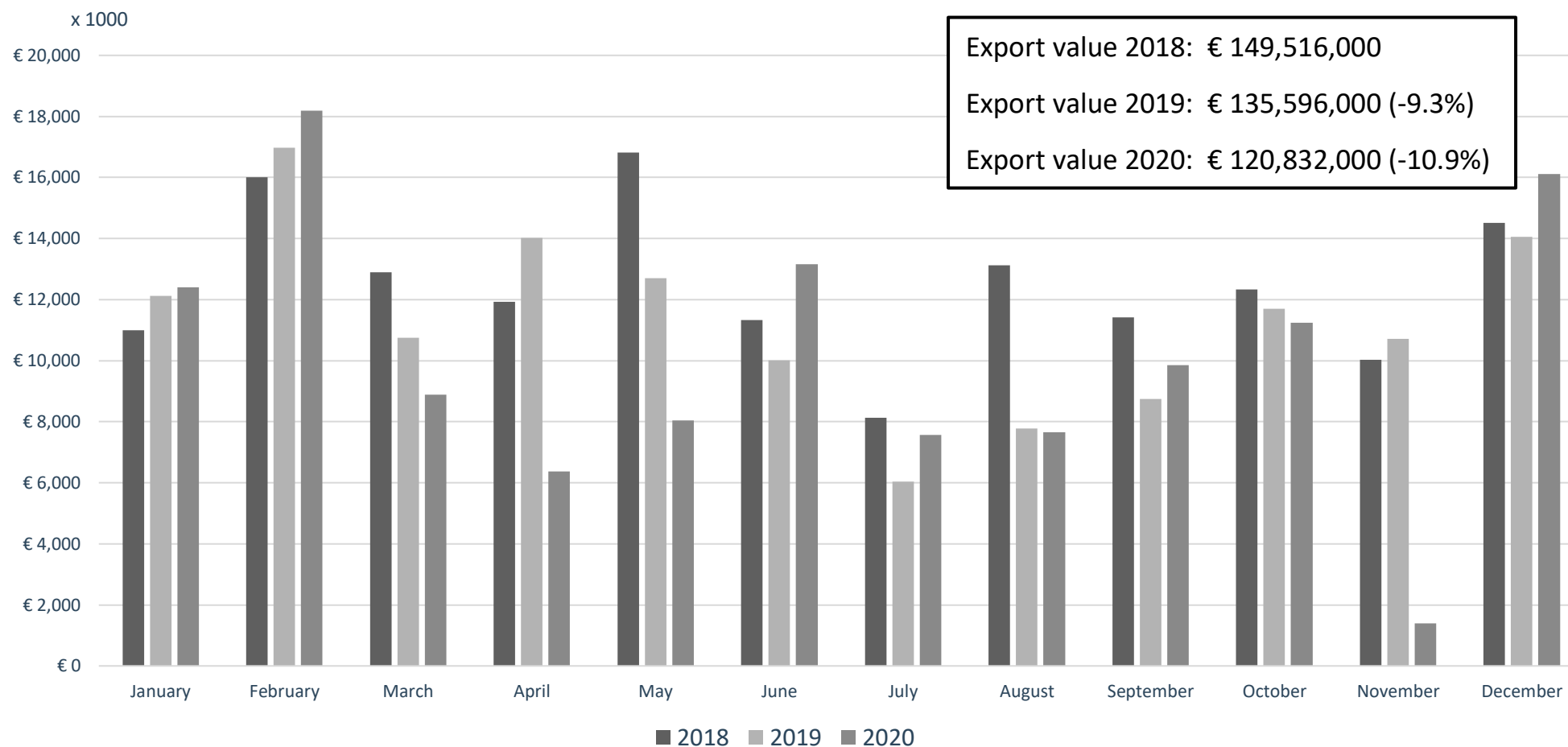


Largest sales channel for cut flowers: Importing Wholesaler



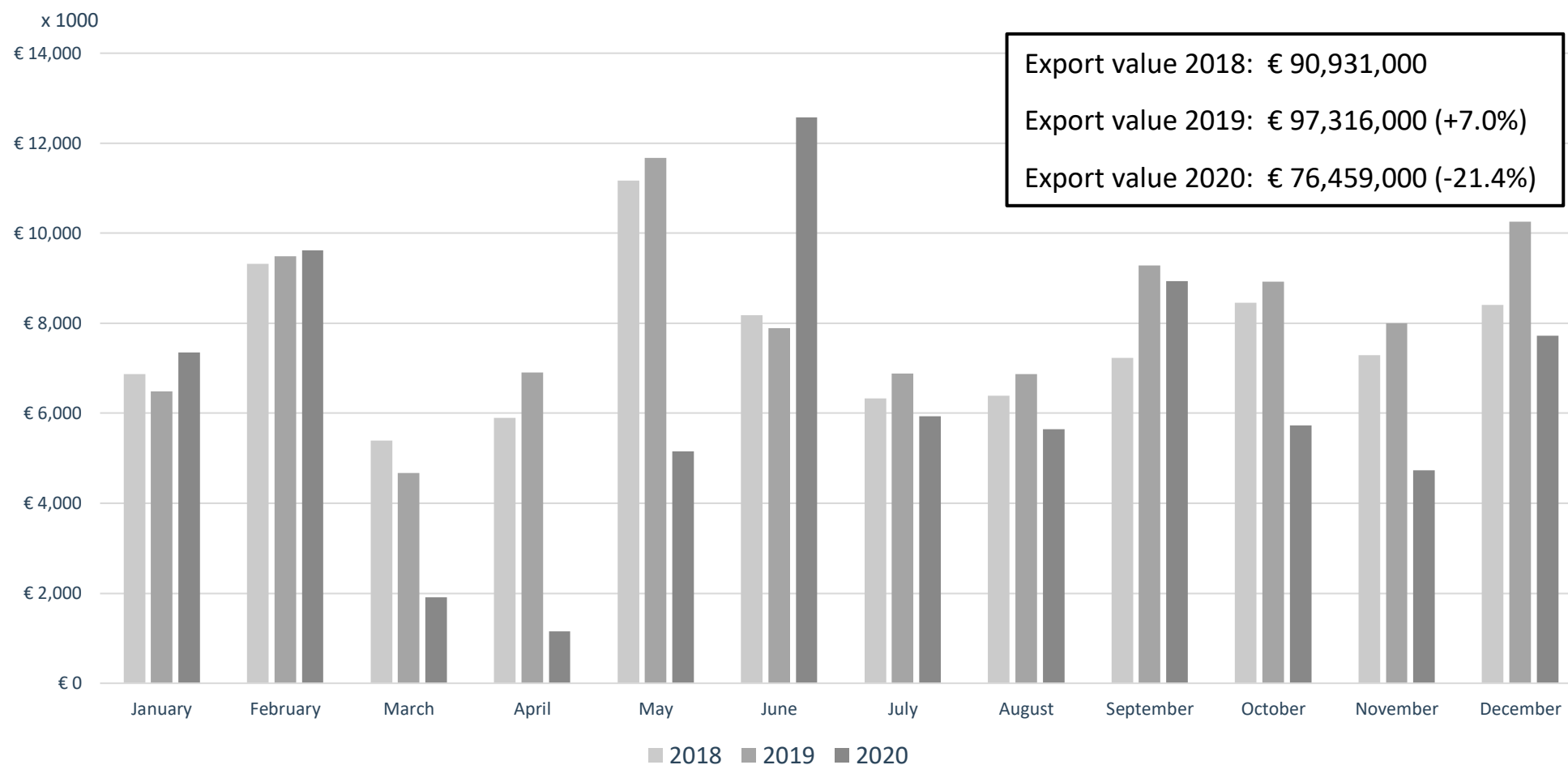
The export value of cut flowers to Importing Wholesaler decreased with 0.3% between 2018 and 2020.
In 2019 the export value increased with 8.7% and in 2020 the export value decreased with 8.3%.

Second largest sales channel for cut flowers: Supermarket / Department Store



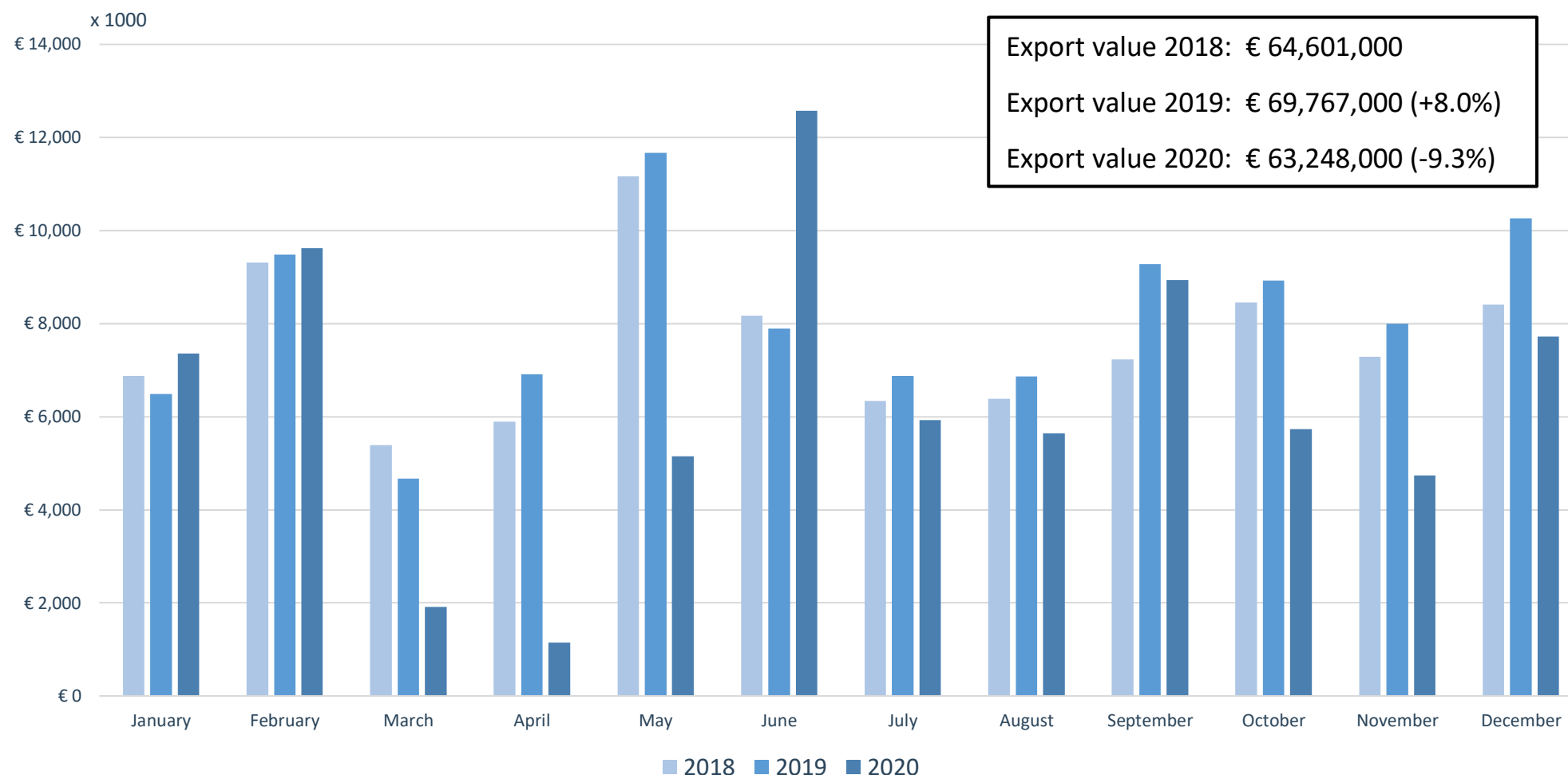
The export value of cut flowers to Supermarket / Department Store decreased with 19.2% between 2018 and 2020. In 2019 the export value decreased with 9.3% and in 2020 it decreased with 10.9%.

Third largest sales channel for cut flowers: Cash & Carry



The export value of cut flowers to Cash & Carry decreased with 15.9% between 2018 and 2020.
In 2019 the export value increased with 7.0% and in 2020 the export value decreased with 21.4%.

Fourth largest sales channel for cut flowers: Independent Flower Shop



The export value of cut flowers to Independent Flower Shop decreased with 2.1% between 2018 and 2020.
In 2019 the export value increased with 8.0% and in 2020 the export value decreased with 9.3%.

Dutch export position cut flowers France

Development Dutch import share cut flowers FRANCE

	2015	2016	2017	2018	2019	2020
	89,3%	91,7%	91,4%	92,1%	90,9%	89,9%

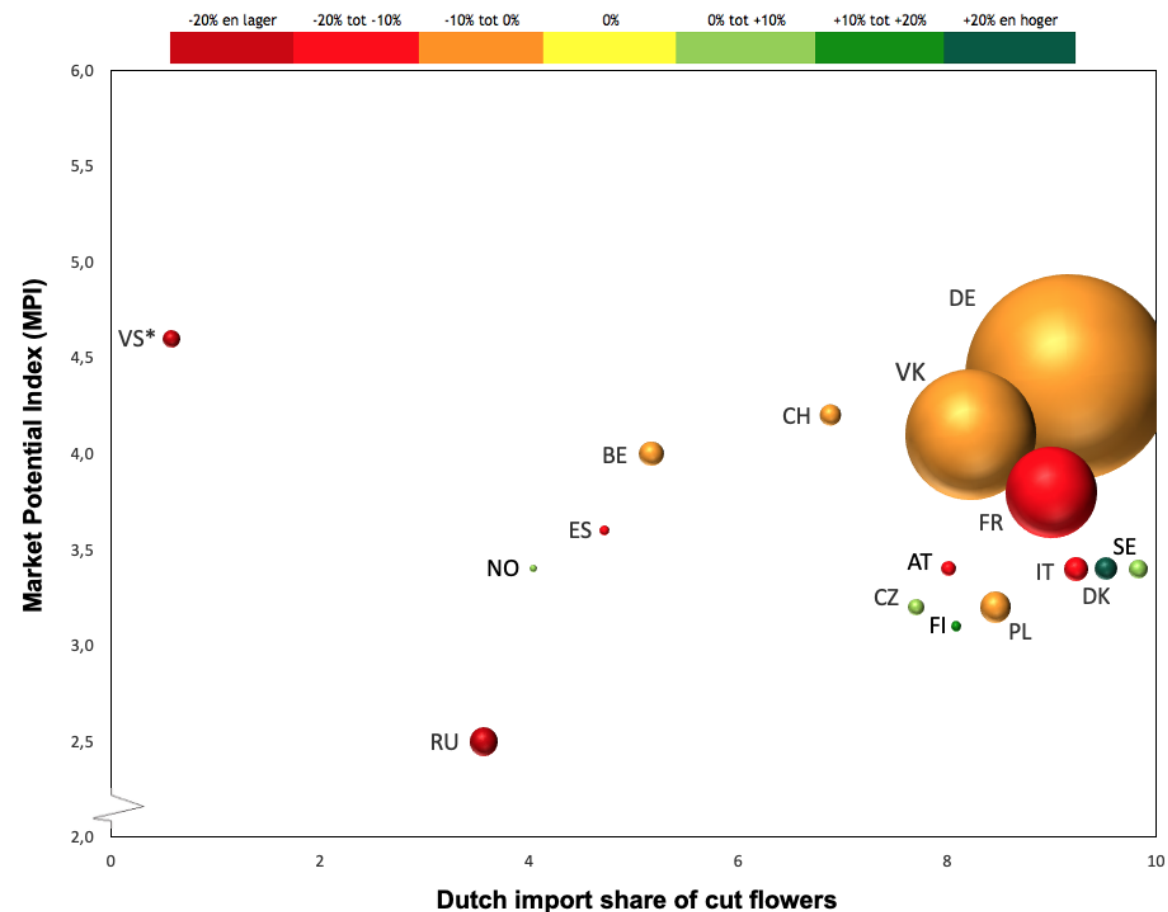
The **vertical axis** illustrates the height of the **market potential**. The higher the globe is positioned in the matrix, the higher country's market potential for international business. The market potential is determined with weighted scores in different dimensions, such as market size, - intensity,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

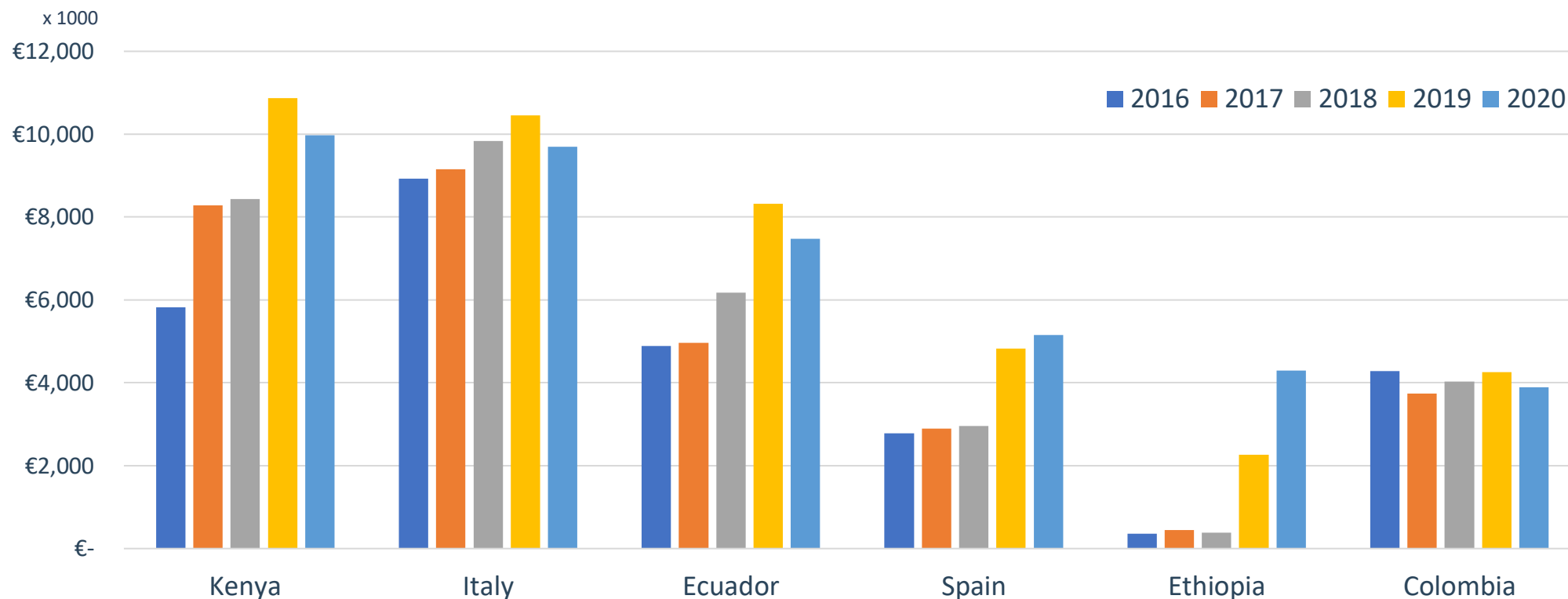
Market potential-Export position Matrix 2020



Source: UN Comtrade and Floridata



Import value cut flowers France from other countries

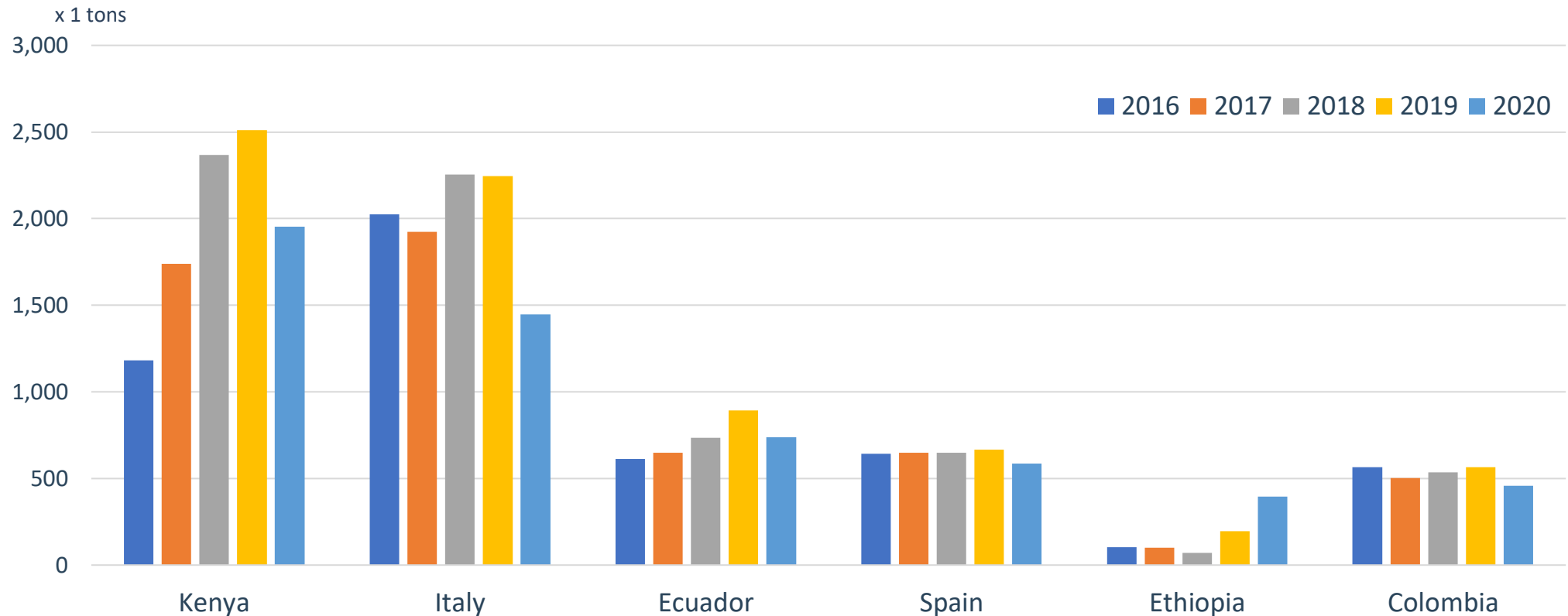


Source: UN Comtrade

The import value of cut flowers from Kenya increased with 18.3% between 2018 and 2020. Kenya is the largest import country after the Netherlands. The import value of cut flowers from Ecuador, Spain and Ethiopia increased between 2018 and 2020.



Import volume cut flowers France from other countries

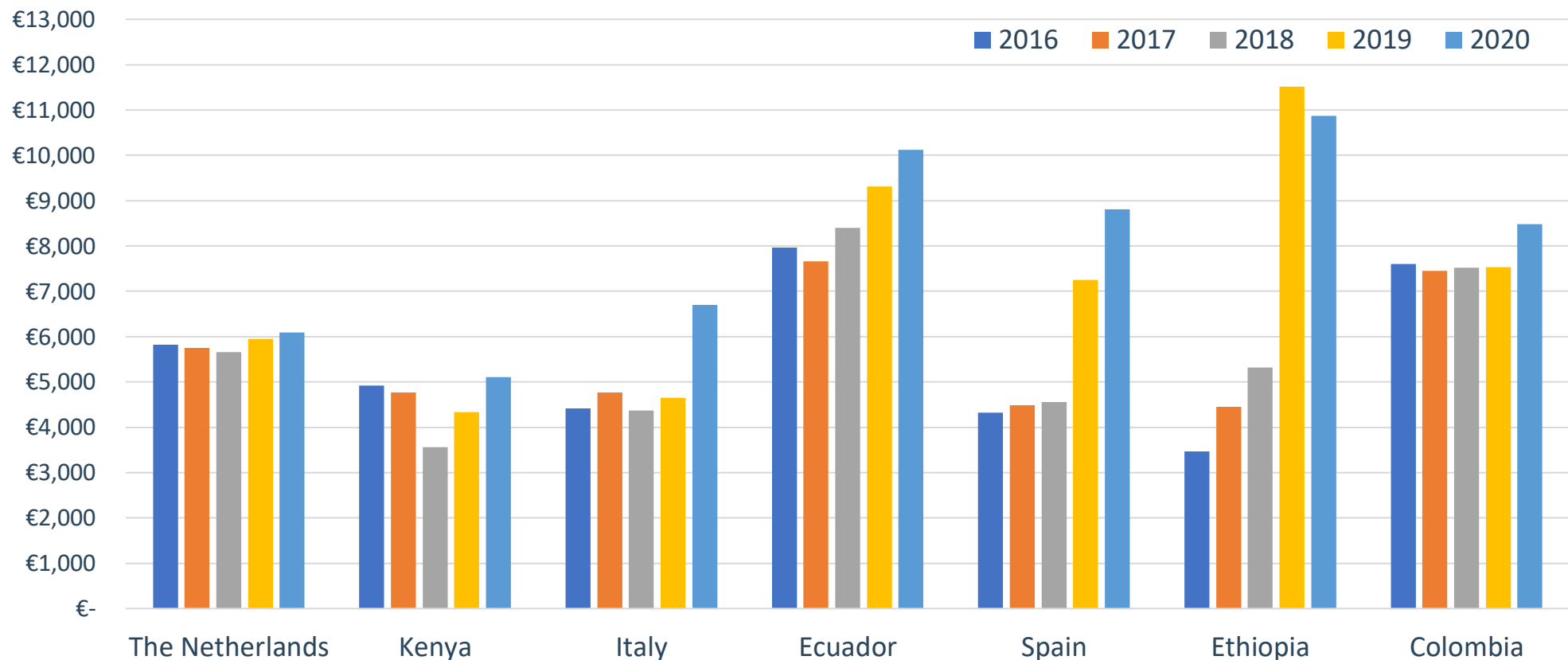


Source: UN Comtrade

The import volume of cut flowers from Kenya decreased with 17.5% and from Italy it decreased with 35.8% between 2018 and 2020. The import volume of cut flowers from Ethiopia increased significantly over the same period.



Import value per ton cut flowers France



Source: UN Comtrade

The import value per ton cut flowers from the Netherlands increased with 7.8% between 2018 and 2020. For all other countries the import value per ton cut flowers increased significantly over the same period.



Cut flowers France	Import value development	Import volume development	Value per ton development	Conclusion
	2016-2020	2016-2020	2016-2020	
The Netherlands	-18,2%	-21,9%	+4,6%	Decreasing import value & decreasing volume → increasing value live cut flowers.
Kenya	+71,3%	+65,2%	+3,7%	Increasing import value & increasing volume → increasing value live cut flowers.
Italy	+8,5%	-28,5%	+51,8%	Increasing import value & decreasing volume → increasing value live cut flowers.
Ecuador	+52,8%	+20,2%	+27,2%	Increasing import value & increasing volume → increasing value live cut flowers.
Spain	+85,4%	-8,9%	+103,5%	Increasing import value & decreasing volume → increasing value live cut flowers.
Ethiopia	+1113,0%	+287,3%	+213,2%	Increasing import value & increasing volume → increasing value live cut flowers.
Colombia	-9,2%	-18,6%	+11,6%	Decreasing import value & decreasing volume → increasing value live cut flowers.

Source: UN Comtrade and Floridata

The value of cut flowers from the Netherlands and Kenya increased slightly between 2016-2020. The value of cut flowers from Italy, Ecuador, Spain and Ethiopia increased significantly over the same period.



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)				
	2016	2017	2018	2019	2020
Cut flower others	32,1%	33,1%	35,5%	37,6%	38,9%
Roses	38,3%	37,5%	36,1%	34,4%	33,5%
Dried/bleached/impregnated	13,5%	13,9%	13,1%	12,9%	12,3%
Foliage	4,9%	5,0%	5,0%	4,9%	5,4%
Chysanthemums	3,9%	3,8%	3,9%	3,8%	3,6%
Orchids	3,3%	2,7%	2,4%	2,5%	2,3%
Lilies	2,0%	2,1%	2,0%	2,0%	2,1%
Carnations	1,9%	1,8%	2,0%	1,8%	1,9%
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)					
2016	2017	2018	2019	2020	2016-2020
€ 161.925	€ 166.984	€ 172.670	€ 186.091	€ 167.578	+3,5%
€ 193.246	€ 188.766	€ 175.732	€ 170.384	€ 144.165	-25,4%
€ 68.094	€ 70.087	€ 63.985	€ 64.018	€ 53.092	-22,0%
€ 24.765	€ 25.430	€ 24.196	€ 24.206	€ 23.218	-6,2%
€ 19.805	€ 19.358	€ 18.831	€ 18.606	€ 15.435	-22,1%
€ 16.869	€ 13.496	€ 11.696	€ 12.593	€ 9.863	-41,5%
€ 10.145	€ 10.652	€ 9.875	€ 9.921	€ 9.090	-10,4%
€ 9.658	€ 9.019	€ 9.602	€ 8.912	€ 8.023	-16,9%
€ 504.507	€ 503.793	€ 486.586	€ 494.730	€ 430.465	-14,7%

Import of roses France	Share of import value roses per country (source: ITC calculations based on UN Comtrade Statistics)				
	2016	2017	2018	2019	2020
Netherlands	91,1%	90,1%	90,7%	89,2%	87,0%
Kenya	2,6%	3,8%	4,1%	5,1%	5,4%
Ecuador	1,7%	1,7%	2,2%	3,2%	3,1%
Ethiopia	0,2%	0,2%	0,1%	0,8%	2,2%
Others	4,4%	4,2%	2,8%	1,8%	2,4%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

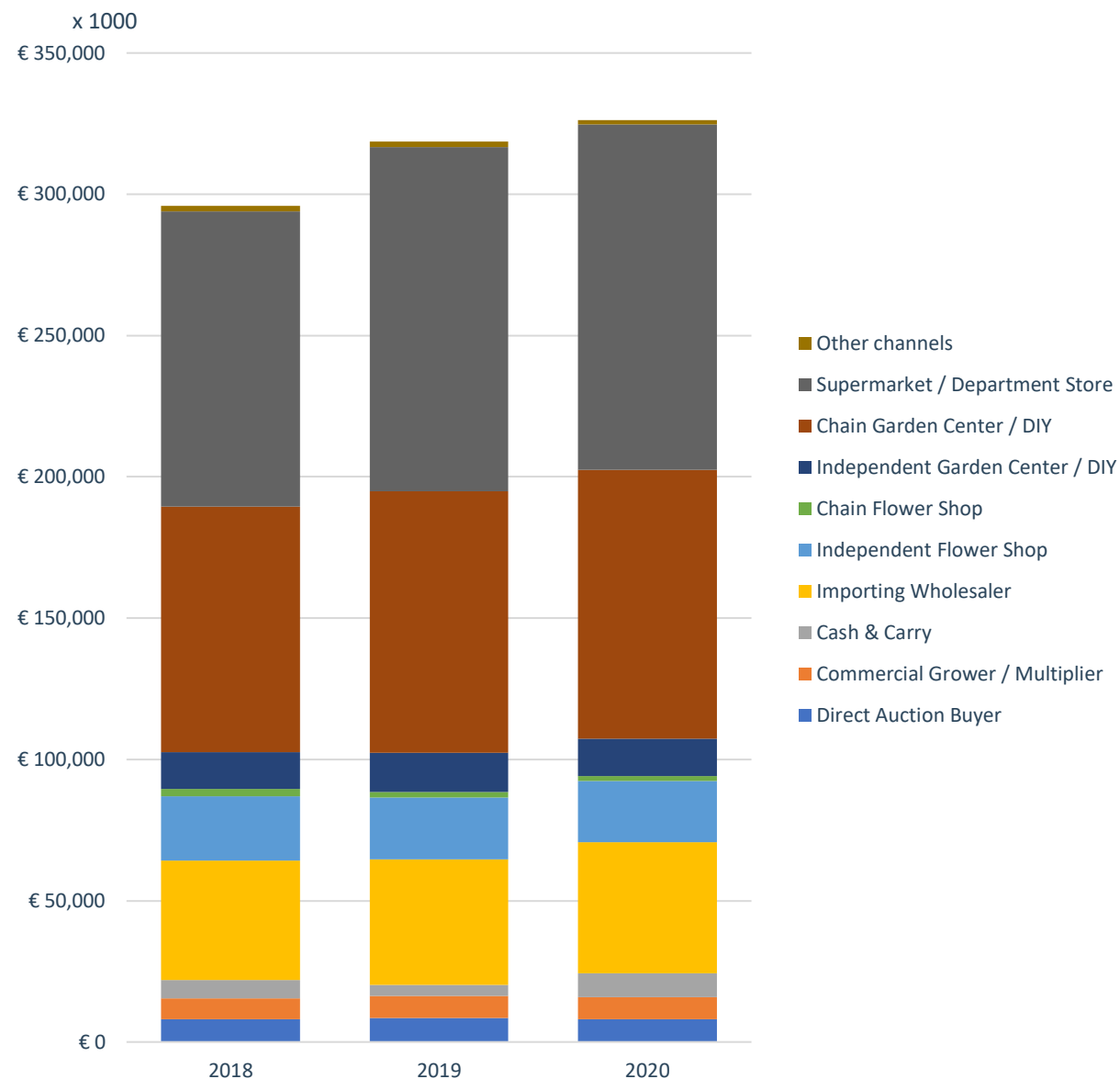
Import value of roses per country (source: Floridata & ITC calculations based on UN Comtrade Statistics)					
2016	2017	2018	2019	2020	2016-2020
€ 193.246	€ 188.766	€ 175.732	€ 170.384	€ 144.165	-25,4%
€ 5.594	€ 8.021	€ 8.010	€ 9.687	€ 8.924	+59,5%
€ 3.611	€ 3.548	€ 4.340	€ 6.107	€ 5.196	+43,9%
€ 352	€ 440	€ 268	€ 1.546	€ 3.592	+920,5%
€ 9.357	€ 8.759	€ 5.413	€ 3.383	€ 3.924	-58,1%
€ 212.160	€ 209.534	€ 193.763	€ 191.107	€ 165.801	-21,9%

The value of cut flowers others increased between 2016-2020 and for all other product groups it decreased over the same period.

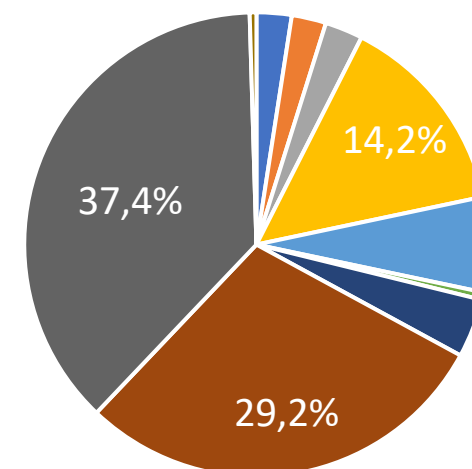
The value of roses from Kenya, Ecuador and Ethiopia increased significantly between 2016-2020.



Pot and garden plants export value to France per sales channel in 2018 – 2020



Sales channels France pot and garden plants 2019

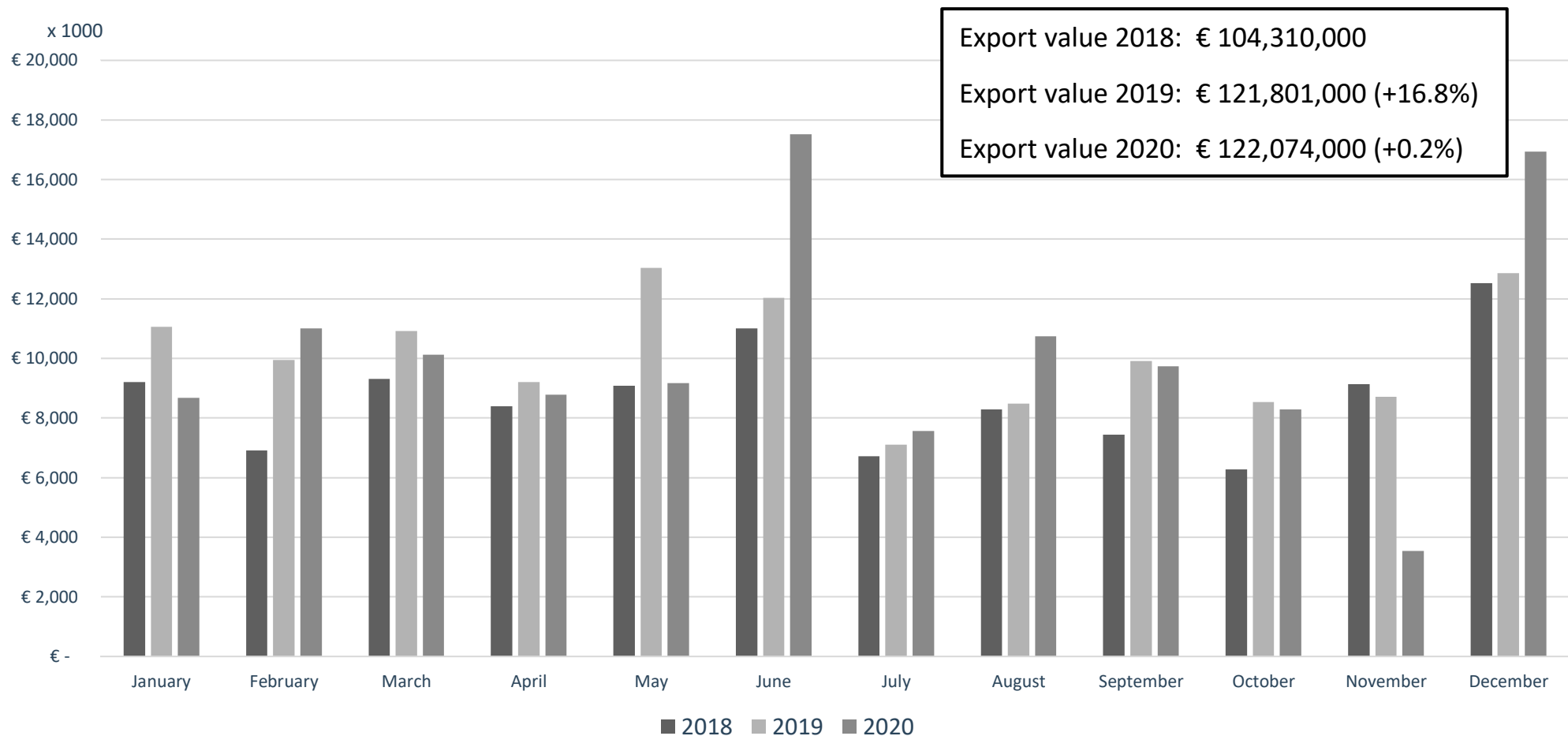


The three largest sales channels for the export of cut flowers are:

1. Supermarket / Department Store (37.4%)
2. Chain Garden Center / DIY (29.2%)
3. Importing Wholesaler (14.2%)

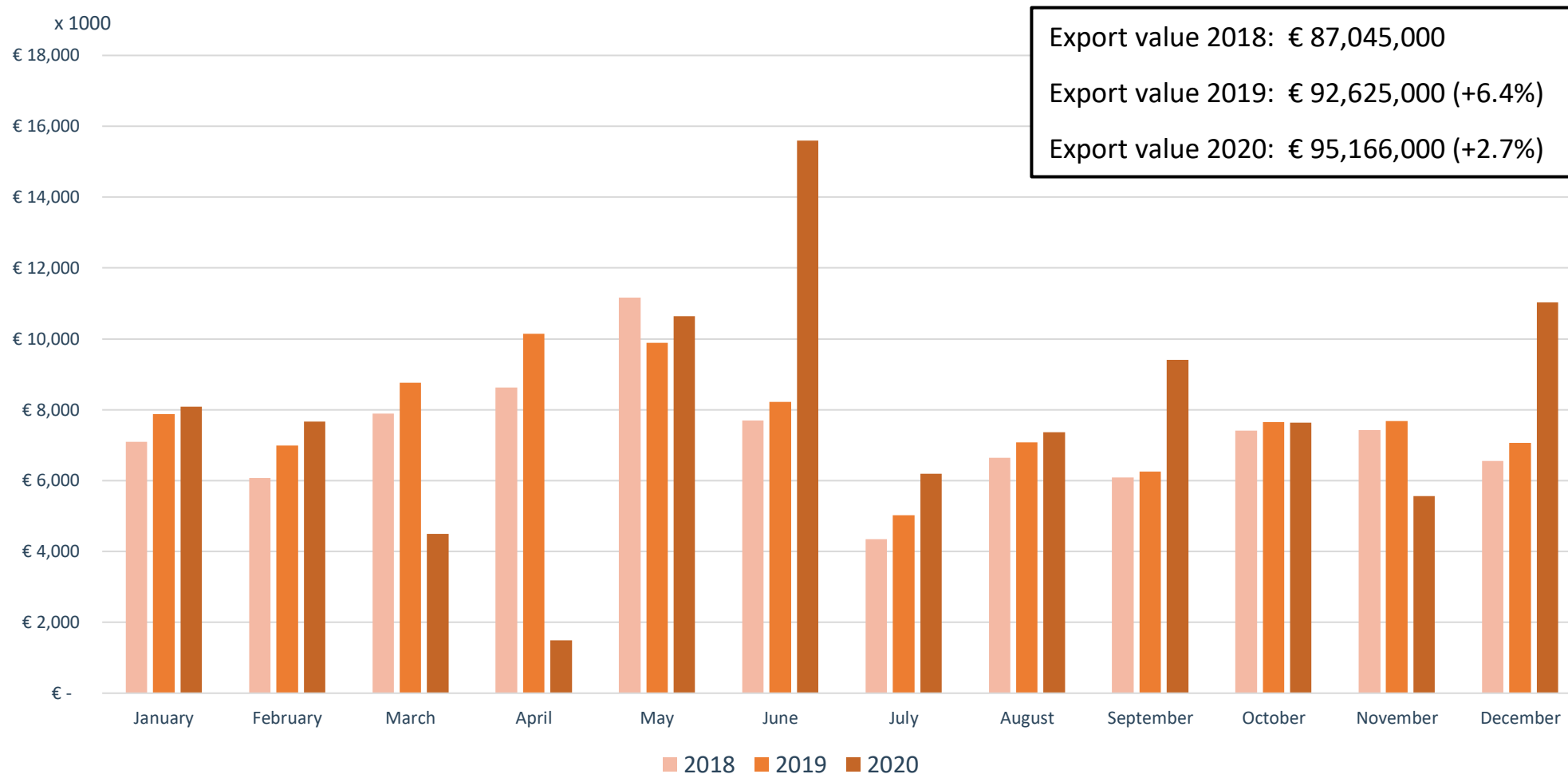


Largest sales channel for pot and garden plants: Supermarket / Department Store



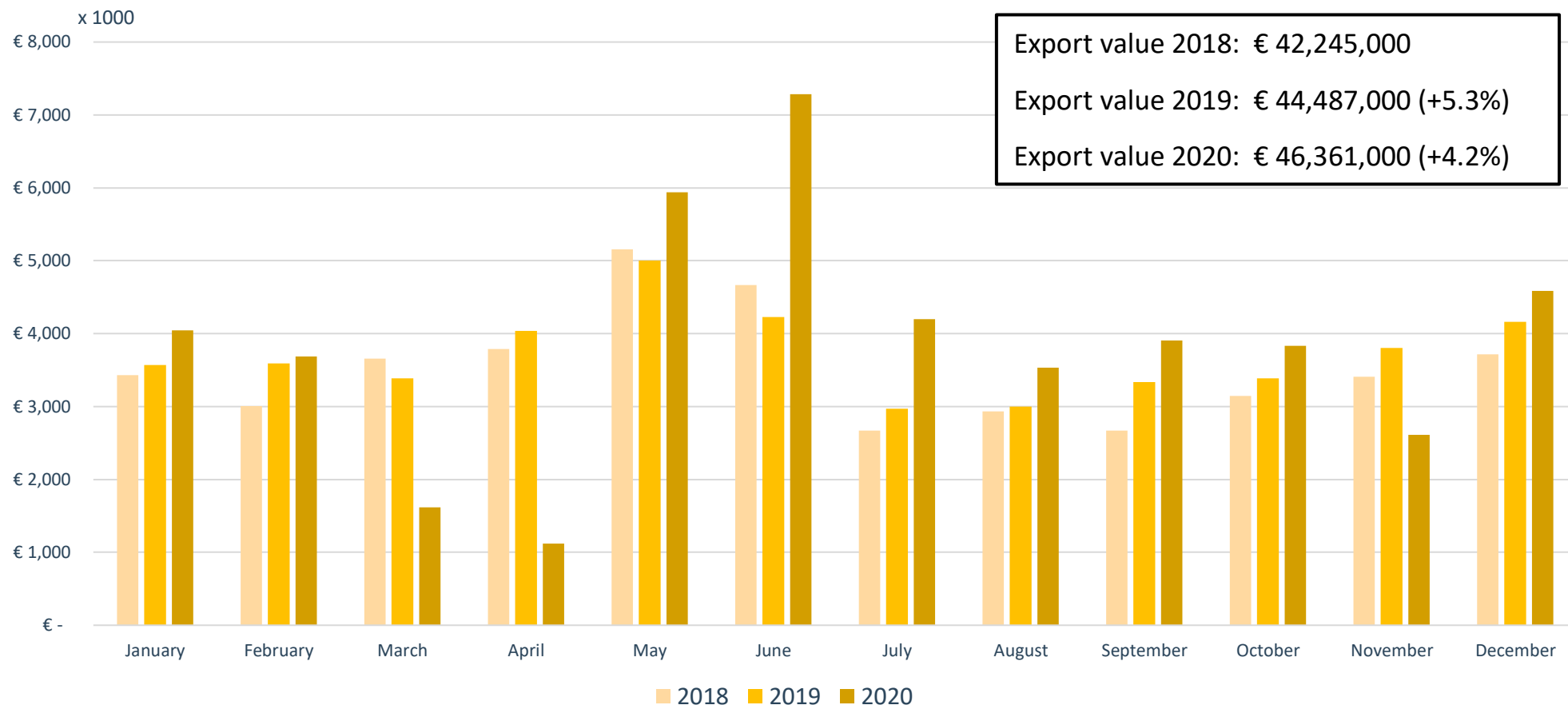
The export value of pot and garden plants to Supermarket / Department Store increased between 2018 and 2020 with 17.0%. In 2019 the export value increased with 16.8% and in 2020 the export value increased with 0.2%.

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 9.3% between 2018 and 2020. In 2019 the export value increased with 6.4% and in 2020 the export value increased with 2.7%.

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



The export value of pot and garden plants to Importing Wholesaler increased with 9.7% between 2018 and 2020. In 2019 the export value increased with 5.3% and in 2020 the export value increased with 4.2%.

Dutch export position pot and garden plants France

Development Dutch import share live plants FRANCE

2015	2016	2017	2018	2019	2020
50,1%	48,9%	48,1%	47,8%	48,8%	49,9%

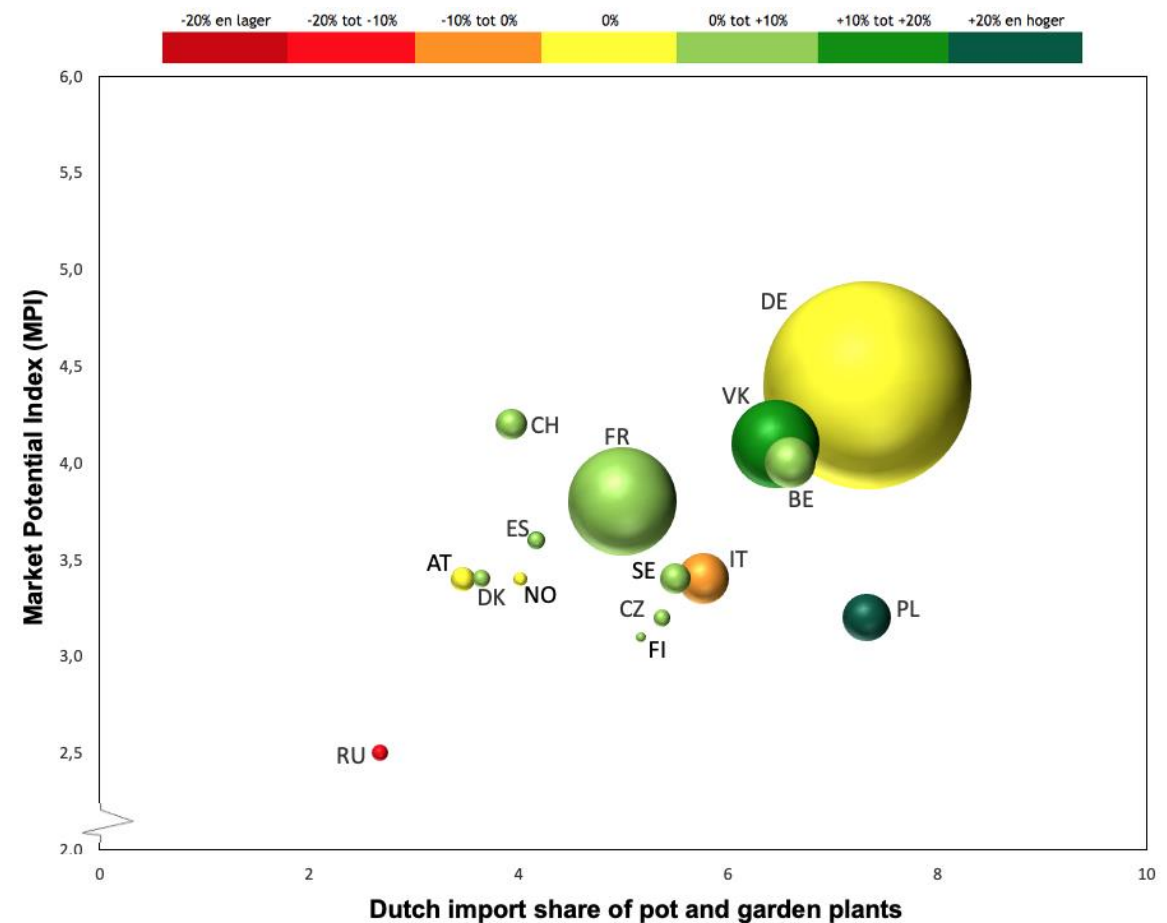
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On the **horizontal axis** the **Dutch export position** of the concerning country is shown. The Dutch import share is expressed in a value between 0 and 10. Meaning, the further the globe is positioned on the right, the larger the total import share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

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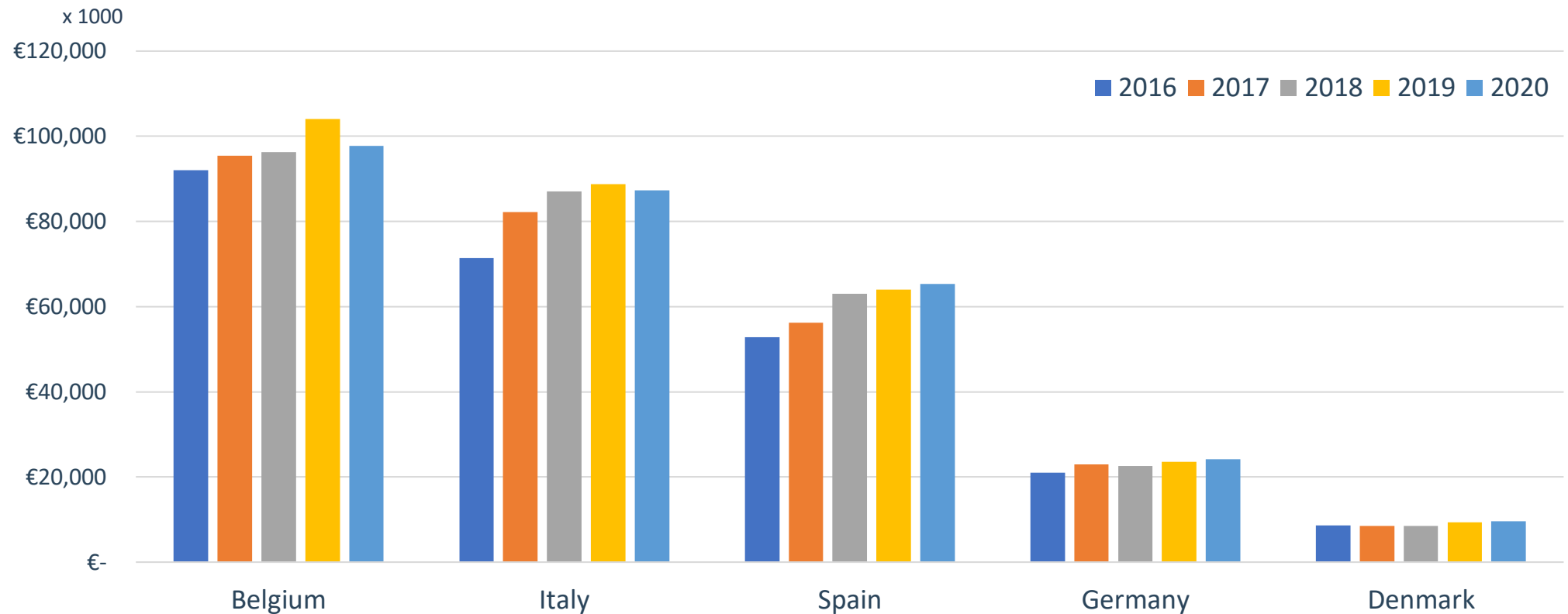
Market potential-Export position Matrix 2020



Source: UN Comtrade and Floridata



Import value live plants France from other countries

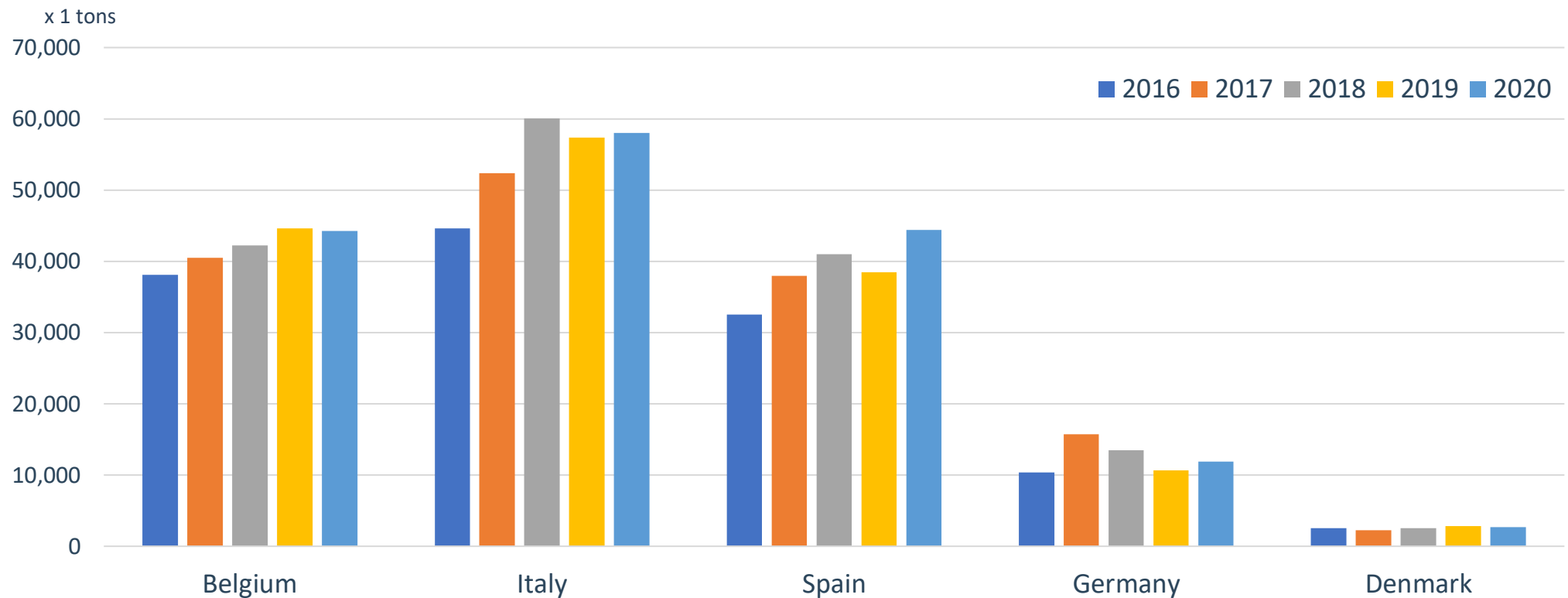


Source: UN Comtrade

The import value of live plants from Belgium increased with 1.5% between 2018 and 2020. 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

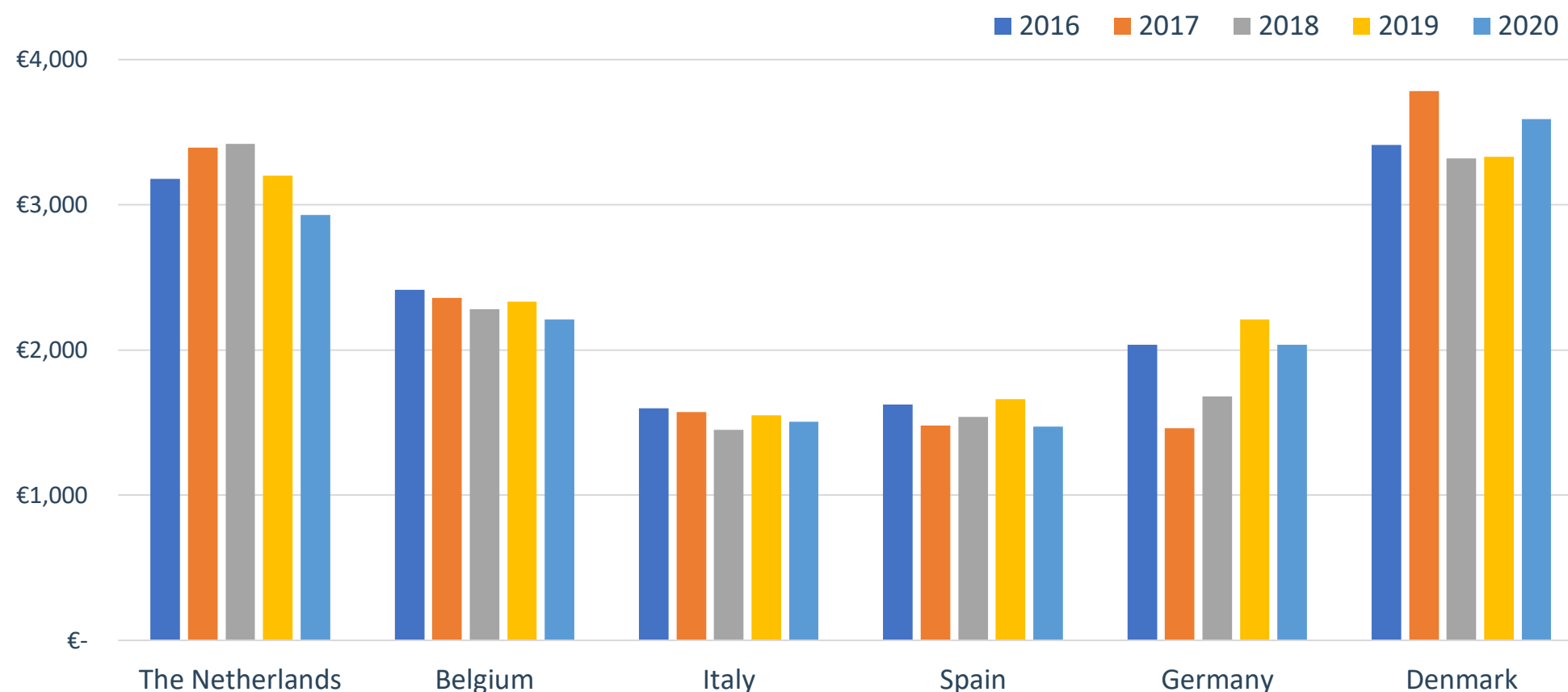


Source: UN Comtrade

The import volume of live plants from Belgium increased with 4.9% between 2018 and 2020. From Spain it increased with 8.3% over the same period. The import volume of live plants from Italy and Germany decreased between 2018 and 2020.



Import value per ton live plants France



Source: UN Comtrade

The import value per ton of live plants from The Netherlands decreased with 14.4% between 2018 and 2020. From Italy and Spain, the value per ton of live plants also decreased over the same period.



Live plants France	Import value development	Import volume development	Value per ton development	Conclusion
	2016-2020	2016-2020	2016-2020	
The Netherlands	+11,3%	+20,8%	-7,9%	Increasing import value & increasing volume > decreasing value live plants.
Belgium	+6,2%	+16,2%	-8,6%	Increasing import value & increasing volume > decreasing value live plants.
Italy	+22,2%	+29,9%	-5,9%	Increasing import value & increasing volume > decreasing value live plants.
Spain	+23,8%	+36,6%	-9,4%	Increasing import value & increasing volume > decreasing value live plants.
Germany	+14,9%	+15,1%	-0,2%	Increasing import value & increasing volume > decreasing value live plants.
Denmark	+11,1%	+5,6%	+5,2%	Increasing import value & increasing volume > increasing value live plants.

Source: UN Comtrade and Floridata

The value of live plants from all countries decreased during the period 2016-2020, except for Denmark.



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)				
	2016	2017	2018	2019	2020
Indoor flowering plants	43,6%	42,2%	39,6%	37,5%	37,2%
Live indoor green plants and cacti	27,4%	27,5%	30,3%	32,4%	31,6%
Live outdoor plants	17,9%	19,2%	19,8%	19,5%	19,4%
Vegetables and strawberry plants	4,4%	4,2%	4,7%	5,0%	5,0%
Roses	3,9%	4,1%	3,4%	3,2%	3,9%
Edible fruit or nut trees/shrubs	2,0%	2,4%	1,7%	2,1%	2,6%
Rhododendrons and azaleas	0,7%	0,5%	0,6%	0,3%	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)					
2016	2017	2018	2019	2020	2016-2020
€ 118.816	€ 118.787	€ 117.136	€ 119.386	€ 121.373	+2,2%
€ 74.546	€ 77.362	€ 89.510	€ 103.416	€ 103.178	+38,4%
€ 48.766	€ 54.006	€ 58.651	€ 62.147	€ 63.213	+29,6%
€ 11.975	€ 11.795	€ 13.775	€ 15.941	€ 16.150	+34,9%
€ 10.613	€ 11.450	€ 10.080	€ 10.145	€ 12.591	+18,6%
€ 5.522	€ 6.669	€ 4.972	€ 6.601	€ 8.515	+54,2%
€ 1.988	€ 1.370	€ 1.674	€ 1.079	€ 1.126	-43,4%
€ 272.226	€ 281.438	€ 295.798	€ 318.715	€ 326.146	+19,8%

Import of flowering indoor plants France	Share of import value indoor flowering plants per country (source: ITC calculations based on UN Comtrade Statistics)				
	2016	2017	2018	2019	2020
Netherlands	70,4%	68,9%	68,5%	70,0%	72,7%
Belgium	15,0%	14,7%	14,1%	14,1%	12,5%
Spain	5,1%	7,2%	8,0%	7,2%	6,6%
Italy	3,8%	4,3%	4,4%	4,2%	3,7%
Others	5,7%	4,9%	4,9%	4,5%	4,5%
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
€ 118.816	€ 118.787	€ 117.136	€ 119.386	€ 121.373	+2,2%
€ 25.281	€ 25.331	€ 24.095	€ 24.027	€ 20.843	-17,6%
€ 8.691	€ 12.391	€ 13.742	€ 12.220	€ 10.996	+26,5%
€ 6.478	€ 7.371	€ 7.491	€ 7.165	€ 6.224	-3,9%
€ 9.589	€ 8.449	€ 8.426	€ 7.689	€ 7.474	-22,1%
€ 168.855	€ 172.329	€ 170.890	€ 170.487	€ 166.910	-1,2%

The value of all product groups increased between 2016-2020, except for Rhododendrons and azaleas.
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)				
	2016	2017	2018	2019	2020
Netherlands	70,1%	71,9%	74,0%	74,5%	73,9%
Belgium	16,1%	15,4%	14,2%	14,7%	14,6%
Spain	5,4%	3,9%	3,9%	3,3%	3,7%
Italy	2,2%	2,7%	2,5%	2,6%	2,6%
Denmark	2,7%	2,7%	2,6%	2,3%	2,1%
Others	3,5%	3,5%	2,8%	2,7%	3,0%
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
€ 74.546	€ 77.362	€ 89.510	€ 103.416	€ 103.178	+38,4%
€ 17.097	€ 16.614	€ 17.129	€ 20.339	€ 20.397	+19,3%
€ 5.747	€ 4.149	€ 4.683	€ 4.538	€ 5.175	-10,0%
€ 2.304	€ 2.864	€ 3.031	€ 3.615	€ 3.697	+60,5%
€ 2.853	€ 2.897	€ 3.189	€ 3.198	€ 2.958	+3,7%
€ 3.755	€ 3.780	€ 3.409	€ 3.689	€ 4.205	+12,0%
€ 106.302	€ 107.666	€ 120.951	€ 138.795	€ 139.610	+31,3%

Import of outdoor plants France	Share of import value outdoor plants per country (source: ITC calculations based on UN Comtrade Statistics)				
	2016	2017	2018	2019	2020
Netherlands	36,6%	36,9%	37,7%	37,7%	39,1%
Belgium	18,8%	18,4%	18,5%	18,2%	17,1%
Spain	12,1%	11,6%	11,4%	11,8%	11,7%
Italy	9,6%	9,6%	10,5%	11,1%	10,8%
Germany	6,4%	6,0%	6,9%	7,0%	7,4%
Others	16,4%	17,6%	15,1%	14,2%	14,0%
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
€ 48.766	€ 54.006	€ 58.651	€ 62.147	€ 63.213	+29,6%
€ 25.099	€ 26.895	€ 28.806	€ 30.082	€ 27.605	+10,0%
€ 16.193	€ 17.003	€ 17.651	€ 19.519	€ 18.855	+16,4%
€ 12.827	€ 14.067	€ 16.281	€ 18.243	€ 17.405	+35,7%
€ 8.562	€ 8.776	€ 10.678	€ 11.535	€ 11.957	+39,7%
€ 21.929	€ 25.758	€ 23.399	€ 23.458	€ 22.687	+3,5%
€ 133.376	€ 146.505	€ 155.466	€ 164.984	€ 161.722	+21,3%

The value of green indoor plants and cacti from Belgium and Spain increased between 2016-2020.
The value of outdoor plants from all other countries increased between 2016-2020.

