

Market Size and Competition

The UK market for imported cut flowers has expanded rapidly in recent years, reaching nearly 50,000 tons in 1989. Consumer demand tends to be conservative, however, concentrating on the 'traditional' varieties such as carnations, roses and chrysanthemums. There are also some other flower types, such as iris and lily, which are imported in moderately large quantities but, in comparison with many other European countries, demand for more unusual flowers, such as the exotic types, is very small.

The Netherlands is by far the largest exporter of cut flowers to the UK, supplying both domestically grown produce and re-exported flowers from around the world. Over 60% of total flower imports were received from the Netherlands in 1988.

Non-European suppliers, such as Israel and Colombia, have a fairly strong presence in the market during the winter season. With the exception of Kenya, which supplies mainly carnations, and Singapore, which sends small quantities of orchids, Commonwealth developing country suppliers of cut flowers are insignificant on the UK market. However, some signs of progress are apparent; for example, several large UK importers have recently brought in flowers, on a trial basis, from Zambia (gladioli) and Zimbabwe.

Timing of Supply

The main potential season of supply for Commonwealth developing countries is the period November - May. (75% of all imports are received during these months). Competition during this period of the year is significantly reduced - domestic and European production being limited to only a few types, notably chrysanthemums and roses, and climatic conditions giving rise to high production costs in Northern latitudes. In addition, the demand for most types of cut flowers peaks during several special festive/ceremonial occasions, all of which fall in this November - May period. These are:-

- Christmas Day (December 25)
- New Year (January 1)
- Valentine's Day (February 14)
- Mothers Day (not fixed, but March or April)
- Easter (not fixed, but March or April)
- Weddings (these occur all year, but the most popular period is Easter/Spring).

Quality and Reliability

The UK market demands extremely high standards of quality and reliability of supply. Commonwealth developing countries must be able to match the exemplary standards set by established suppliers, in particular the Netherlands. For all flower varieties, quality of blooms, stems and leaves must be excellent, as must standards of grading and packaging. Shelf-life must be maximised as far as possible. Flowers which are not of top quality are heavily discounted. In addition, exporters must be able to ensure that all consignments are of a consistently high quality and are supplied on a regular and reliable basis. These requirements are becoming ever more important with the increasing significance of the supermarket/multiple sector in the UK retail flower market.