

Dried flowers - EUROPEAN UNION

Product description

HS 0603.90-00	Dried, dyed, bleached, impregnated or otherwise prepared cut flowers and buds for bouquets or for ornamental purposes.
HS 0604.99-10	Dried parts of plants for bouquets or for ornamental purposes.
HS 0604.99-90	Dyed, bleached, impregnated or otherwise prepared (excluding fresh and dried), parts of plants (without flowers or buds).

In practice, consignments are not always recorded under the corresponding headings.

Production

Commercial production is concentrated mainly in the Netherlands, by far the largest producer of dried flowers, followed by Italy, Spain, the United Kingdom and France.

Imports

<i>European Union: Imports of Dried Flowers, 1990-1994</i> (V: ECU ,000; Q: metric tons)										
	1990		1991		1992		1993		1994	
	Q	V	Q	V	Q	V	Q	V	Q	V
Total Imports	21,497	95,093	20,353	107,745	20,626	100,499	25,569	113,289	32,501	121,730
0603.90-00	6,380	52,827	7,355	64,446	7,643	59,974	12,524	71,697	18,411	79,623
0604.99-10	8,737	18,467	7,210	17,812	7,228	17,968	8,275	21,149	8,697	23,380
0604.99-90	6,101	23,799	5,788	25,487	5,755	22,557	4,770	20,443	5,393	18,727

Note: Totals may not tally due to rounding off of data. As from 1 January 1993, with the creation of the single European market, only extra-EU supply should be considered imports. For the purpose of estimating the trend during the period under review, data in this table include intra and extra EU-trade.
Source: EUROSTAT-COMEXT

As shown in annex I, in 1994 the greatest part of the trade was intra-EU, with non-EU suppliers accounting for approximately 32% of the value of total supply, but 44% of its volume.

In 1994, imports (from non-EU sources) of dried cut flowers and buds accounted for 33% of total supply of this category in terms of volume; dried parts of plants accounted for 78% and prepared parts of plants for 31%.

Annex II shows that the Netherlands is by far the major importer followed by Germany, the United Kingdom, Italy and France. The considerable increase of Dutch imports can be attributed to changes in the method of data collection of the trade flows between members of the EU.

Market profile

The dried flower market can be divided into three market segments, each with its own characteristics: traditional dried flower arrangements, pot-pourri and arrangements with dried plant materials.

(a) Traditional dried flower arrangements

This market is the most valuable, both in terms of total sales and value. Dried flowers, grasses and, to a lesser extent, seed heads are used mainly by florists to make semi-permanent, and maintenance-free, flower arrangements. They are found both in homes and in commercial locations throughout Europe.

The style of arrangement is usually the same as that for fresh flower arrangements. To help the designers in the creation of displays, the products need to have natural stalks of 15 to 40 cm. If the stalks are not of an acceptable length, the products should have wire (or preferably cane) stalks glued on with hot-glue guns. Generally the dried product is odourless but an attractive natural smell helps to stimulate sales. Over 300 species are used in dried flower arrangements.

The bulk products in this market are: Statice (*Limonium sinatum*, and particularly *Limonium tartarica*); Everlasting or Straw flower (*Helichrysum*) in pale pink, dark pink and cream; *Helichrysum bracteatum*; *Nigella* (Love in a mist - *Nigella damascena*); Larkspur, mainly pink, and to a lesser extent, blue (*Delphinium consolida*); Canary grass (*Phalaris* sp.); wheat, often natural green (*Triticum* sp.); roses, generally red or pink (*Rosa* sp.); Poppy seed heads (*Papaver somniferum*); *Rhodanthe* (*Helipterum manglesii*), both white and pink; lavender (*Lavandula spica*); Quaking grass (*Briza media*); *Eucalyptus gunnii* (juvenile foliage) and *Achillea* sp.

Among the most important of the 'exotic' dried flower products are: *Protea compacta* (buds and flats); *Protea repens* (flats); cane cones (a split cane which has formed a spiral at one end); palm spears (palm leaf cut into a spear shape); lotus heads (the seed head from *Nymphaea* sp.); *Banksia* sp.; *Leucadernon plumosum*; and *Leucadernon sabulosum*. Many of these flowers are dyed in Europe according to buyers' specifications. In continental Europe the colours tend to be more vivid, while a shift in taste is taking place in the United Kingdom from pastel shades to strong, naturalistic colours.

The dried flower market is dominated by Dutch processors/wholesalers working in co-operation with the Dutch dried flower growers. It is the combined efforts of these groups which has been the principal force behind the expansion in European demand.

(b) Pot-pourri

The main purpose of a pot-pourri is to create a pleasant fragrance. It consists of an attractive mixture of dried plant material of assorted shapes, sizes and colours, which has been treated with a blend of scents. Pot-pourri is normally displayed in bowls and is most often found in bathrooms and bedrooms. Pot-pourri is also packed in small muslin bags which are placed in wardrobes and drawers as clothes fresheners.

Pot-pourri materials are marketed in bulk, and generally command low unit prices.

An ideal pot-pourri plant material will be of decorative and attractive appearance with a unit size not exceeding 8 cubic centimetres and have appropriate absorbent properties for dyes.

The material should have a strong natural colour, or be of a light enough shade to take non-toxic dyes. In addition, the material should be dry (maximum moisture content 7%), resistant to mould, non-toxic, free from noxious odours, of a low bulk density and sufficiently robust to withstand mechanical blending. Generally pot-pourri plant materials should have no smell of their own. Pot-pourri mixes are made up according to formulae so that products can match specifications year after year. Companies usually aim to build up a range of named pot-pourri products, each with a unique combination of colours, dried plant materials and fragrances.

Over 300 products are used in pot-pourri mixes. The major ones include Bachelor's buttons (*Globe amaranth*); *Gomphrena globosa*, both dyed and in its two natural colours - purple and, most especially, white; rose buds and petals (*Rosa* sp.), especially red and, to a lesser extent, pink; Kesu (a yellow flower which dyes readily into a range of colours), *Helichrysum* sp. flower heads; Cockscomb (*Celosia argentea*); Marigold flowers (*Tagetes* sp.); Windmill pods; green leaves (such as Bay leaves - *Larus noblis*); Neem leaf (*Azadirachia indica* and *Pithocellobium dulce*); dried mosses such as Oak moss, Bakuli and Kola nuts (*Cola* sp.); blue Mallow flowers (*Malvia sylvestris*), stones from plums, peaches and apricots and, in the cheaper mixes, wood shavings. Many of the ingredients are dyed.

The United Kingdom is the biggest pot-pourri market, and remains a growth market.

(c) Arrangements with dried plant materials

A whole range of unusually shaped materials are used to make arrangements which are quite distinct from those of dried flowers. Examples are wreaths and arrangements in bowls, frames or on strings. The market is small (except in Germany) and specialized with high unit values. Products do not need to have natural or artificial stalks attached. Examples of products used include large pine cones (*Pinus* sp.); Wooden roses (*Operculina* sp.); dried Capsicums (*Capsicum annum* and *C. frutescens*); ornamental Gourds (*Cucurbita pepo*); seed pods and heads; exotic grasses and leaf material; unfurling fern fronds, and even bark and twigs.

The German market is the principal user of dried plant material and is supplied by German importers, Italian importers/processors and, to a lesser extent, by a few Dutch importers.

Market access

International trade restrictions on the sale of endangered species apply to European markets.

The rates of duties levied on imports are:

Tariff heading	Autonomus	Conventional 1996	Uruguay Round 2000	GSP 1996
0603.90.00	20%	18.3%	10%	5.8%
0604.99.10	4%	3.3%	free	free
0604.99.90	17%	15%	10.9%	10.5%

Imports from ACP countries and LDDCs enter duty free. As from January 1995 a new Generalized System of Preferences entered into force. Details on the new system can be obtained from the European Commission, Directorate General for External Economic Affairs, North-South Relations, Unit IK3/GSP, 14, Rue de la Science, 1049 Bruxelles Fax: (32.2) 2991047. Attention: Mr. F. Nizery.

Packaging

All packaging must be designed to prevent damage to the material (i.e. crushing, etc.). Each market uses different packaging. For example, for the Netherlands market, dried flowers are packed about 20 bunches to a box (80x38x26 cm). Each box weighs about 3 kg, and some 750 boxes can be packed in a 40-foot container. Packaging can also be in fully telescopic boxes for added strength. Packaging varies with species; some (e.g. Statice) are sold by the kilogramme (generally 2 kg packs), others by the number of heads or bunches. Pot-pourri products are normally packed in cardboard boxes of around 0.03 - 0.04 cubic metres, and weigh between 8 to 12 kg. Only the most robust plant material is packed in sacks.

Distribution channels

Imports are generally carried out by specialist importer/wholesaler channels. Some wholesalers have cash-and-carry facilities for retailers and florists.

The main retail outlets include florists, department and chain stores, specialist and gift stores. Pot-pourri is also sold by chemists, department and chain stores, supermarkets and gift shops.

Commercial practices

Imports are usually based on samples and discussions with wholesalers. The vast majority of imports are shipped by sea (containerized) to minimize freight rates. Credit terms vary considerably between exporters, for example Thai exporters can offer 90 day terms, Dutch exporters 60 days and United Kingdom growers 30 days. Major importers will pay cash against documents.

Pot-pourri products are always sold by weight. The German, Spanish and Italian markets usually sell other materials by weight, while the Netherlands and United Kingdom markets sell mainly by bunches, based on Netherlands specifications.

Market prospects

EU imports are expected to continue expanding helped by tariff reduction under the Uruguay Round and growing consumption.

The fashion-conscious nature of the demand has the disadvantage of creating relatively short-lived product lines; but it ensures an on-going demand and continuing opportunities for new products.

The market does offer high-priced niche markets for innovative lines in dried plant material and flowers. These opportunities can be used as a springboard for exporters to the EU market. The early consignments can often be air-freighted as the high unit prices of specialist items can cover the cost of shipment by air.

In addition, sales of pot-pourri are expected to continue to rise, especially in Europe, as it is considered to be a more ecologically sound air freshener than aerosol fresheners. This naturally implies greater import volumes into the EU.

The best opportunities exist for dried flowers and plant material which cannot be grown in Europe without heated greenhouses. Examples are Protea, Banksia, exotic grasses and similar products. Exporters should study their own native flora and waste products from existing crops to identify potential products.

Sales for exotic display material in particular, are thus expected to increase. The German market, being the most sophisticated, will be the most receptive of truly new and unusual "exotic" material.

Annex I

SUPPLIERS TO THE EUROPEAN UNION IN 1994, by product

(V:ECU '000, Q:tons)

06039000	Q	V	06049910	Q	V	06049990	Q	V
WORLD	18411	79623	WORLD	8679	23380	WORLD	5393	18727
INTRA-EU	12345	60399	INTRA-EU	1947	8262	INTRA-EU	3732	13677
EXTRA-EU	6066	19224	EXTRA-EU	6732	15118	EXTRA-EU	1661	5050
NETHERLANDS	9930	46002	INDIA	2263	3699	NETHERLANDS	1301	3689
KENYA	3704	8915	SOUTH AFRICA	1440	4737	ITALY	996	5496
ITALY	795	4469	ITALY	773	3099	INDIA	536	1277
GERMANY	445	2463	HUNGARY	584	558	PORTUGAL	394	219
UK	348	3174	FRANCE	459	1135	GERMANY	373	1688
SOUTH AFRICA	342	11550	POLAND	383	314	BELG-LUX	192	320
INDIA	316	1313	NETHERLANDS	346	2364	USA	188	796
BELG-LUX	304	1516	USA	333	1153	FRANCE	1174	369
POLAND	298	762	BRAZIL	283	713	POLAND	166	240
AUSTRALIA	252	1044	TURKEY	232	163	UK	131	957
TANZANIA	233	469	AUSTRALIA	186	645	SPAIN	131	657
FRANCE	232	1390	SPAIN	129	686	CHINA	130	727
DENMARK	132	479	SLOVENIA	126	95	SOUTH AFRICA	124	471
SPAIN	122	773	GERMANY	123	431	ROMANIA	92	149
COLOMBIA	95	568	ISRAEL	108	901	CZECH REP	74	53
ISRAEL	73	731	ZAIRE	85	35	TURKEY	63	216
CAMEROON	71	204	AUSTRIA	69	300	COSTA RICA	61	194
BRAZIL	68	307	KENYA	67	252	ALBANIA	44	3
TUNISIA	64	503	CZECH REP	65	34	ISRAEL	36	275

Source: EUROSTAT-COMEXT

Annex II

European Union: main importers - extra-EU trade				
V: ECU'000 - Q: M T				
	1993		1994	
	V	Q	V	Q
HS 0603.90-00 Total :	9,622	1,973	19,224	6,066
NETHERLANDS	1,203	192	10,468	4,068
GERMANY	2,128	542	2,844	692
FRANCE	1,819	351	1,768	359
UNITED KINGDOM	1,516	376	1,534	431
ITALY	1,075	189	1,045	188
BELGIUM-LUXEMBOURG	1,046	174	713	105
SPAIN	513	109	493	98
GREECE	83	11	153	40
DENMARK	41	10	103	69
PORTUGAL	193	18	69	8
IRELAND	5	1	34	8
HS 0604.99-10 Total:	6,009	13,224	6,732	15,118
GERMANY	3,138	6,774	3,205	6,869
ITALY	1,061	2,274	1,328	2,545
NETHERLANDS	1,041	2,176	1,315	3,341
UNITED KINGDOM	295	721	339	794
BELGIUM-LUXEMBOURG	127	167	174	318
SPAIN	176	443	162	461
DENMARK	111	295	99	271
FRANCE	48	272	94	424
GREECE	10	77	13	74
PORTUGAL	2	25	3	21
HS 0604.99-90 Total:	5,285	1,679	5,050	1,661
GERMANY	3,428	1,242	3,011	1,009
UNITED KINGDOM	490	163	741	249
NETHERLANDS	491	93	601	172
ITALY	277	91	297	122
FRANCE	320	56	203	56
SPAIN	138	29	146	39
GREECE	7	1	20	4
BELGIUM-LUXEMBOURG	113	1	11	1
DENMARK	12	2	10	8
PORTUGAL	9	1	10	1

Source: (Eurostat-Comext)

Annex III

LIST OF IMPORTERS
(This list is not exhaustive)

Austria

Kirschner H. Walter
Pfarrkirchen 81
A-4540 Bad Hall
Tel: (43 7258) 2540

Prochaska U. Cie Gesmbh
Graben 14
A-1014 Wien
Tel: (43 1) 53456
Fax: (43 1) 5345638

Oder Hermann Gesmbh U. Co Kg
Wienerstrasse 253
A-4023 Linz, Donau
Tel: (43 732) 33370
Fax: (43 732) 333762

Iberoamerica Export-Import
Praterstrasse 47/1/5
A-1021 Wien
Tel/Fax: (43 1) 2165735

Gul Gastgewerbe Und
Lebensmittelhandel Gesmbh
Oetzerau 32
A-6433 Oetz, Tirol
Tel: (43 5252) 2427
Fax: (43 5252) 2293

Koch Michael Gesmbh
Baustoffgrosshandel
Bauweltstrasse 7
A-7210 Mattersburg
Tel: (43 2626) 65151
Fax (43 2626) 65150

Teneco Warenhandels Gesmbh
Robert Schumann Gasse 38
A-2380 Perchtoldsdorf
Tel: (43 1) 86530600
Fax: (43 1) 865306010

Holland Blumen Import Gesmbh
Stoffellagasse 7
A-1020 Wien
Tel: (43 1) 7280376
Fax: (43 1) 7293190

Sochor A. U. Co Gesmbh
Brucknerstrasse 8
A-1041 Wien
Tel: (43 1) 5053601
Fax: (43 1) 5056257

Denmark

I. & E. Moller
Orevej 2
3660 Stenlose
Tel: (45 42) 184228

Brdr. Petersen/NPA Group
Gronttorvet 63-89
2500 valby
Tel: (45 31) 176691
Fax: (45 31) 169747

England

Cut & Dried
Balls farm Rd.
IDE, Exeter EX2 9RA
Tel: (44 1392) 422407/75696

Flowerscene Limited
1&2 Wainman Road
Woodstone Industrial Estate
Peterborough, Cambs PE2 OBU
Tel: (44 1733) 371088
Fax: (44 1733) 371020

Martin Bros Dried Flower Specialist
Longford Farm, Longford
Market Drayton, Shropshire, TF9 3PW
Tel: (44 1630) 638295

Norpar Dried Flowers
Navestock Hall
Navestock, Essex RM4 1HA
Tel: (44 1277) 372314
Fax: (44 1277) 372562

Santer dried Flowers
Tel: (44 1580) 753519

Sun King Flowers
Tel: (44 1406) 380425
Fax: (44 1406) 380083

Sussex Dried Flowers
37 Hill Lane, Barnham
West Sussex PO22 OBL
Tel: (44 1243) 553490

Winter Flora
Hall Farm, Weston, Beccles
Suffolk, NR34 8TT
Tel: (44 1502) 713346
Fax: (44 1502) 717139

Florimex Manchester
Tel: (44 161) 2231006
Tel: (44 1978) 861863

Southern Glasshouse Produce Ltd
Swallowfield Nurseries
Titchfield Road Fareham
Hampshire Po14 3EP
Tel: (44 1329) 844214
fax: (44 1329) 844425

France

Atelier Romantique
26 rue des Moulissard
21240 Talant
Tel: (33 80) 5652697
Fax: (33 80) 80580462

Ets Brouquier et Fils
Quartier des Negadoux
83190 Ollioules
Tel: (33 94) 630425
Fax: (33 94) 637248

Les Createures de Vermont
13 rue d'Esquebecq
B.P. 35
59470 Wormhout Cedex
Tel: (33 28) 628008
Fax: (33 28) 629060

Flore-Graphies de Guy Lafon
B.P. 103
83150 Bandol
Tel: (33 94) 324141
Fax: (33 94) 301290

Martin Bauer
Etiau
49670 Valanjou
Tel: (33 41) 797241
Fax: (33 41) 454695

Germany

Hollerer Walter
Krahenweg 28
90768 Furth
Tel: (49 911) 751309

Beutling, Hans-Gunther
Ackermannstr 4
Achim
Tel: (49 4202) 3395

H. Andreas GmbH
Industriestrasse 9
D-8714 Wiesentheid
Tel: (49 9383) 2020
Fax: (49 9383) 20270

Exotica Cor Mulder GmbH
Reutwiesenstrabe 45
D-7143 Vaihingen/Enz-Gundelbach
Tel: (49 7042) 2981
Fax: (49 7042) 23200

Jeschke KG
Brunnenstrabe 9
PF 1252
D-8483 Vohenstraub
Tel: (49 9651) 838
Fax: (49 9651) 839

Annemarie Selmayr
Gewerbepark 4
D-8205 Kiefersfelden
Tel: (49 8033) 6710

Netherlands

Antrosmi Natural Dried Flowers
Rijksweg 96
9422 CG Smilde
Tel: (31 5927) 59227
fax: (31 5927) 59873

De Vink Van Delft Droogbloemen
Floralaan 2T
2231 ZV Rijnsburg
Tel: (31 1718) 25401

Hogewoning Bv
Postbus 265
2230 AG Rijnsburg
Tel: (33 1718) 28501
Fax: (33 1718) 32055

Mur B.V., P.C.
Lakenblekerstratt 15
1431 GE Aalsmeer
Tel: (33 2977) 21032
fax: (33 2977) 21580

Star Dried Flowers B.V.
Floralaan 2a
2230 AC Rijnsburg
Tel: (33 1718) 25521
Fax: (33 1718) 22832

Norway

Berde Plants Norway As
Alnabruveien 9
N-0668 Oslo
Tel: (47 22) 658270
Fax: (47 22) 653021

Inter Engros As
Golsv.
Postbox 10 Sentrum
N-2920 Leira
Tel: (47 61) 362666
Fax: (47 61) 362395

Flora Dekor As
Gramv. 14
Postbox 55
N-1801 Askim
Tel: (47 69) 886220
Fax: (47 69) 886424

Annex IV**USEFUL ADDRESSES****(a) Trade Fairs**

Formland: Unit Messer
 Kongevejen 84
 2840 Holte
 Denmark
 Tel: (45 42) 425711
 Fax: (45 42) 425245

Florissimo
 International Exhibition of plants and exotic flowers.
 Biannual
 Organization: Parc des Expositions et Congres
 3 bd de Champagne
 BP 108
 21003 Dijon Cedex
 France
 Tel: (33 80) 773900
 Fax: (33 80) 773939

Hortiflor
 Professional exhibition of flowers
 Annual
 Organization: Safi
 62 rue d'Hauteville
 75010 Paris
 France
 Tel: (33 1) 47709583
 Fax: (33 1) 47701054

Jardiflor
 Annual
 Organization: DME
 1 rue du Parc
 92300 Levallois-Perret
 France
 Tel: (33 1) 49685100
 Fax: (33 1) 47377456

Gave-og Interior-messen
 Sjolystsenteret
 Gift and Interior Exhibition
 Twice a year (Spring and Autumn)
 Organization: Messedrift As
 NNGF Box 754
 N-1411 Kolboth
 Norway
 Tel: (47 66) 804000
 Fax: (47 66) 804140

Imp. Messe Essen Gmbh Norbertstrabe
 P.O. Box 100165
 D-4300 Essen 1
 Germany
 Tel: (49 201) 72440
 Fax: (49 201) 7244448

Messe Frankfurt Gmbh Plantec Fair Team
 Postfach 150210
 Ludwig-Ehrhard-Anlage 1
 6000 Frankfurt/M 1
 Germany
 Tel: (49 69) 75756297/75756618
 Fax: (49 69) 75756612

Jarditec
 Professional exhibition of house and garden.
 Organization: CEP
 1 rue du Parc
 2593 Levallois-Perret Cedex
 France
 Tel: (33 1) 49685100
 Fax: (33 1) 47377447

Bibliography and sources of information

- **Eurostat- Comext Analytical** Tables of Foreign Trade
- **Official Journal of the European Community** No L 319, 30 December 1995 (import tariffs)
- **Official Journal of the European Community** No L 348 of 31 December 1994, OJ No L 82 of 12 April 1995 and OJ 208, 5 September 1995 (generalized tariff preferences)

Abbreviations

EU: European Union
ACP: African, Caribbean and Pacific States
GSP: Generalized System of Preferences
LDDC: Least-Developed Developing Countries