

## CBI MARKET SURVEY

## THE CUT FLOWERS AND FOLIAGE MARKET IN SPAIN

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**Report summary**

This CBI market survey discusses, amongst others, the following highlights for the market for cut flowers and foliage market in Spain:

- Spanish consumption of cut flowers has been increasing steadily for many years. In 2005, Spain surpassed The Netherlands and became the fifth largest market for cut flowers and foliage in the EU.
- Spain is the ninth largest EU importer of cut flowers and foliage. In line with the increasing consumption, its total imports also increased considerably.
- The share of direct imports from outside the EU is relatively large in Spain. Strong ties between Spain and the Latin American countries favour direct imports from these countries.

This survey provides exporters of cut flowers and foliage with sector-specific market information related to gaining access to Spain. By focusing on a specific country, this survey provides additional information, complementary to the more general information and data provided in the CBI market survey 'The market for cut flowers and foliage in the EU', which covers the EU in general. That survey also contains an overview and explanation of the selected products dealt with, some general remarks on the statistics used, as well as information on other available documents for this sector. It can be downloaded from <http://www.cbi.nl/marketinfo>

**1. Market description: consumption and production****Consumption*****Total market size***

Spanish consumption of cut flowers has been increasing steadily for many years with a growth rate of 6.7% annually. In 2005, Spain surpassed The Netherlands and became the fifth largest market for cut flowers and foliage in the EU, amounting to € 953 million. In the same period, per capita consumption increased by 5.1% annually. It has currently reached € 22. In the coming years, cut flower consumption is expected to continue increasing by 3.9% annually. This is the result of the growing economy, which causes an increase in purchasing power of consumers and makes flowers more affordable for the average Spaniard.

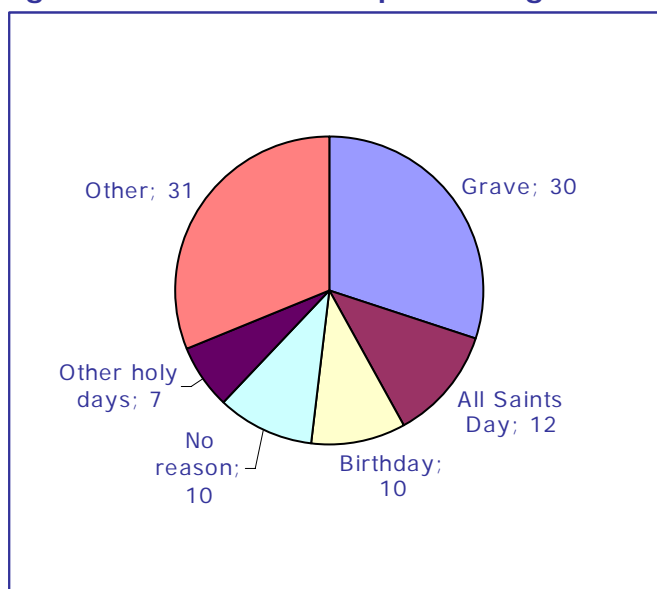
Nevertheless, the share of households which buys flowers decreased from 52% in 1998 to 42% in 2003. This is the result of a decrease in the absolute number of households purchasing flowers and an increase in the total number of households. Buying mono-bunches is most common among households; 26% of households purchase mono-bunches. Mixed bouquets are purchased by 17% of households, single flowers by 10% and compositions by 7%. Average purchasing frequencies are 2 times a year for mixed bouquets, mono-bunches and single flowers, and once a year for compositions.

Flowers for own use are mainly bought to decorate the house. Flowers as gifts are considered to be an easy present and a good alternative to other popular presents. Flowers as gifts are mostly bought as presents for birthdays and for special days like Valentine's day, Mother's day and Father's day. Interesting to note is that more than half of all flower buyers act on an impulse when they buy flowers.

**Table 1.1 Occasions for buying flowers in Spain, 2002-2003, share in %**

	2002	2003
Present outside household	55	55
Present within household	26	24
Own use	9	12
Other	10	11

Source: Commodity Board for Horticulture (2005)

**Figure 1.1 Occasions for purchasing flowers as gifts, 2003, shares in %**


Source: Horticulture Commodity Board (2005)

### Product groups

- Mixed bouquets are increasing in popularity in Spain, accounting for 34% of total cut flower sales. This increase is mainly at the expense of sales of mono-bunches (38%). About 22% of the cut flowers is sold in a composition and 6% is sold as single flowers.
- Criteria used for buying flowers are: colour and type of flowers.

**Table 1.2 Top 10 flowers in Spain, 2002-2003, in % of sales**

	2002	2003
Dianthus	38	42
Rosa	36	37
Dendranthema	9	11
Lilium	1	3
Tulipa	1	2
Gerbera	1	1
Gladiolus	3	1
Zantedeschia	1	1
Other	10	3
<b>Total</b>	<b>100</b>	<b>100</b>

Source: TNS/ Commodity Board for Horticulture (2005)

### Market segmentation

- Flower purchases are quite evenly spread over the different age categories. However, people older than 65 spend relatively less on flowers while people between 50 and 65 spend relatively more on flowers than average.
- Only 14% of the companies in Spain frequently buys flowers. Companies with more than 50 employees are more often flower purchasers. Reasons for companies to buy flowers are the

decorative function and creating a cosy atmosphere. Reasons for some companies for not buying flowers are a lack of interest by employees, no time, dark interior or dry air.

### ***Trends in consumption***

Flowers are becoming more affordable to the average Spanish consumer. They are no longer just luxury products. As a result, they are also increasingly purchased for own use. The increasing sales of mixed bouquets can also be ascribed to the higher disposable incomes.

The construction sector is rapidly building new houses in Spain. Housing is improving and stimulates the development of home decoration. The entry of IKEA to the Spanish market and the emergence of other decoration stores confirms this. Flowers are decorative items and their sales are therefore expected to increase.

## **Production**

### ***Total production***

Spain traditionally has a considerable floricultural sector. The Spanish production of cut flowers accounted for € 323 million in 2002.

Production is mainly concentrated in six regions, from the south to the northwest of Spain. The main cut flower species produced are Dianthus (50%) and Rosa (15%). Other flowers produced in Spain are Gladiolus, Dendranthema, Gerbera, Lilium, Iris and foliage.

The main bottlenecks for the local production are the lack of a well functioning sales channelling system, rising costs of labour and increasing competition from countries with low-cost production.

Moreover, the major part of producers concerns family enterprises operating on a small-scale, with old-fashioned technology and machines. This is mainly due to a lack of resources to invest structurally in companies.

Since the sector is fragmented and organisation and operations do not always focus on market-led production, over-supply has resulted in a reduction in prices of Dianthus. Many small growers are not able to produce in a profitable way and a number of producers even switched to producing plants and vegetables, for which prices and returns seemed better. The bigger growers, mostly professionals and bigger players in the market, located in Catalonia and Valencia, do not encounter such problems because of their better production technology and variety in assortment.

**Table 1.3 Area used for the production of cut flowers, 1998**  
In % and ha

Region	%	ha	Number of enterprises	Average area (ha)
Andalucia	43	1,000	1,393	0.72
Canarias	13	290	309	0.94
Cataluña	10	234	208	1.13
Valenciana	5	116	252	0.46
Galicia	1	30	75	0.40
Murcia	8	175	635	0.28
Others	20	455	3,317	0.14
<b>Total</b>	<b>100</b>	<b>2,300</b>	<b>6,189</b>	<b>0.58</b>

Source: Flower Council of Holland (2005)

The major production regions are Andalusia, Cataluña, Canary Islands, Valencia, Galicia and Murcia. The traditional production region Cataluña (Barcelona) is becoming less important, due to expensive land and a lack of staff. The production on the Canary Islands is roughly stable.

The Canary Islands and Andalusia mainly produce Rosa. On the Canary Islands, tropical flowers like Strelitzia, and Protea and other Fijnbos varieties are also produced.

According to FEPEX, no less than 80% of all growers have organised themselves in regional associations and federations of associations.

**Table 1.4 Leading production regions, 1998, in % of variety**

	Rosa	Dianthus	Others
Andalusia	16	57	28
Murcia	9	14	9
Galicia	10	11	9
Others	19	9	23
Canarias	31	5	12
Cataluña	10	4	11
Valenciana	6	1	10

Source: Flower Council of Holland (2005)

### Major players

The FEPEX website offers an up-to-date listing of growers who are active, amongst others in the production of cut flowers and foliage: <http://www.fepex.es>. Go to "Empresas".

### Trends in production

- Growers in Spain are increasingly shifting to a more diverse assortment.
- The average size of growers is increasing.

### Opportunities and threats

- The increasing demand in the Spanish market can only partly be filled by domestic production.
- The increasing domestic production and investments in the Spanish floricultural sector lead to fiercer competition for market shares. Competition will become particularly stronger for those flowers and foliage which are increasingly produced in Spain.

### Useful sources

- Federación Española de Asociaciones de Productores Exportadores de Frutas, Hortalizas, Flores y Plantas Vivas (FEPEX): <http://www.fepex.es>
- Banco de España: <http://www.bde.es>
- Instituto de Comercio Exterior: <http://www.icex.es>
- Ministerio de las Relaciones Internacionales: <http://www.sispain.org>
- Instituto Nacional de Estadística (INE): <http://www.ine.es>

## 2. Trade: imports and exports

### Imports

Spain is the ninth largest EU importer of cut flowers and foliage, accounting for 2% of total EU imports. In line with the increasing consumption, its total imports also increased considerably, by 40% between 2001 and 2005, amounting to € 63.2 million in 2005.

The value of imports sourced in developing countries increased by 6% annually between 2001 and 2005, amounting to € 28 million in 2005. The share of direct imports from outside the EU is relatively large in Spain compared to most Northern European countries. This is probably the result of the fact that The Netherlands play a smaller role in Spain's imports, compared to other EU countries. Furthermore, the strong ties between Spain and the Latin American countries favour direct imports from these countries.

Not surprisingly, leading developing countries supplying the Spanish market are Colombia (24%) and Ecuador (17%), from which imports continued to increase between 2001 and 2005. Ecuador experienced especially strong annual growth of 15%.

The main EU supplier is The Netherlands (46%), followed at a distance by Portugal (2%).

As can be seen in Table 2.1, Rosa and Dianthus together account for half of Spain's imports of cut flowers and foliage. The imports of Orchid, Gladiolus and Dendranthema are negligible. In the period reviewed, imports of all product groups increased. The strongest growth could be registered for the imports of Orchid (13% annually), foliage (24%) and Gladiolus (58%).

Imports of Dianthus and other fresh cut flowers from developing countries increased the strongest between 2001 and 2005, with 8% and 19% annually respectively. Developing countries play no role in the supply of Gladiolus and Dendranthema.

**Table 2.1 Imports by Spain and leading suppliers to Spain, 2001 - 2005,**  
€ million / share in % of value

Product	2001 € mln	2005 € mln	Leading suppliers in 2005 share in %		Share in Spanish imports
Total cut flowers and foliage	45.1	63.2	Intra-EU:	The Netherlands (46), France (5), Portugal (2).	55%
			Extra EU excl DC:	Israel (0,5).	0.5%
			DC*:	Colombia (24), Ecuador (17).	44%
Rosa	12.9	17.9	Intra-EU:	The Netherlands (26), Italy (1).	28%
			Extra EU excl DC:		0%
			DC*:	Ecuador (53), Colombia (20).	72%
Dianthus	10.1	12.6	Intra-EU:	Portugal (6).	7%
			Extra EU excl DC:		0%
			DC*:	Colombia (89), Morocco (2).	93%
Orchids	1.1	1.9	Intra-EU:	Netherlands (84), Italy (1).	86%
			Extra EU excl DC:	New Zealand (1).	1%
			DC*:	Thailand (13).	14%
Gladiolus	1.1	1.9	Intra-EU:	The Netherlands (89), Portugal (8).	99%
			Extra EU excl DC:		0%
			DC*:	South Africa (2).	2%
Dendranthema	0.039	0.24	Intra-EU:	The Netherlands (98), Italy (2).	100%
			Extra EU excl DC:		0%
			DC*:		0%
Other fresh cut flowers	3.9	1.6	Intra-EU:	The Netherlands (83), Germany (3), Portugal (2).	89%
			Extra EU excl DC:	Israel (1).	1%
			DC*:	Ecuador (7), Colombia (2).	9%
Prepared cut flowers	3.4	3.5	Intra-EU:	The Netherlands (68), Poland (6), France (3), Portugal (3).	87%
			Extra EU excl DC:	Israel (1).	1%
			DC*:	India (5), China (4).	13%
Foliage	2.1	5.1	Intra-EU:	France (52), The Netherlands (13), Belgium (4).	75%
			Extra EU excl DC:	USA (1).	2%
			DC*:	China (8), India (6), Philippines (3), South Africa (3).	24%

Source: Eurostat (2006)

\*Developing Countries

### Imports by product group

Rosa and Dianthus are the most interesting product groups for developing countries in terms of import share and value. 72% of Spanish imports of Rosa is supplied by developing countries, amounting to € 12.9 million in 2005. Ecuador is the largest developing country supplier of Rosa to Spain (€ 9.4 million) with still-increasing exports (12% annually) for the period 2001-2005. However, the dominance of developing countries in the supply of Rosa



could be undermined by the increasing presence of The Netherlands. The Netherlands experienced stronger growth than Ecuador, namely 36% annually, with a 26% import share of Rosa. After The Netherlands, Colombia is the third largest supplier of Rosa to Spain. Its exports declined by 7% annually between 2001 and 2005.

Total Spanish imports of Dianthus increased by 6% annually amounting to € 12.6 million in 2005. Imports from developing countries increased by 8% annually between 2001 and 2005. Colombia is by far the largest supplier of Dianthus, accounting for 89% of Spain's imports of this product group, valued at € 38.2 million in 2005. Colombia's supply of Dianthus to Spain increased by 8% annually for the period 2001 -2005. Morocco started exporting Dianthus to Spain in 2003 and now accounts for 2% of Spain's total imports of Dianthus.

Also noticeable is the increasing presence of India in the supply of prepared cut flowers and the increasing presence of Thailand in the supply of Orchids. India's export to Spain increased annually by 13%, turning the country into the 3<sup>rd</sup> largest supplier of prepared cut flowers. Thailand's exports increased annually by 4%, making it the 2<sup>nd</sup> largest supplier of Orchids to Spain.

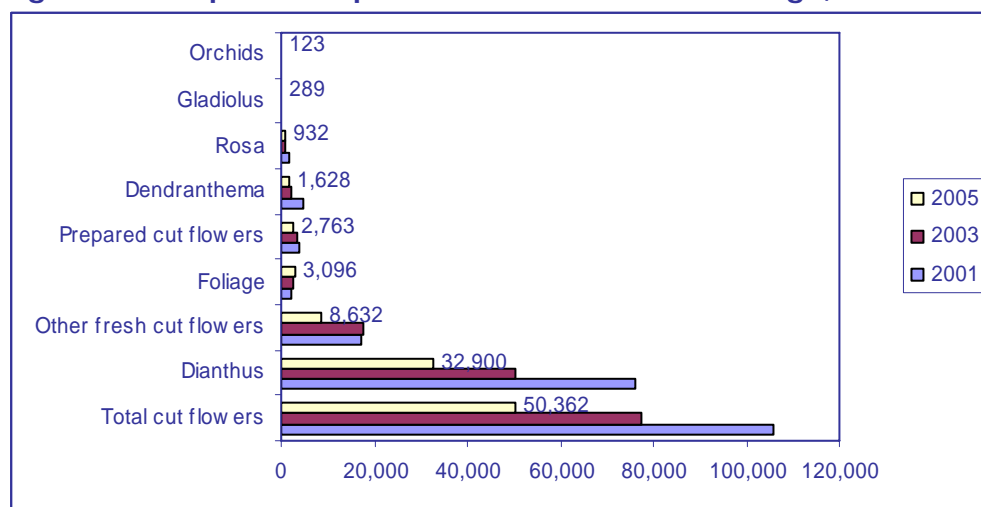
## Exports

Spain used to be one of the largest exporters of cut flowers and foliage in the EU. Although still ranked fourth, its exports decreased sharply by 52% between 2001 and 2005. This is partly due to the steady increase in domestic consumption of cut flowers (7% annually), so for growers it has become more interesting to sell their produce on the domestic market as an alternative to exporting.

Spanish exports amounted to € 50.3 million in 2005, making the country a net importer of cut flowers and foliage. Its leading three export destinations are the UK (€ 17.6 million), The Netherlands (€ 15.5 million) and France (€ 7.8 million). However, exports to all these three countries decreased considerably between 2001 and 2005.

As can be seen in Figure 2.1 Spain's exports are mainly composed of Dianthus, however, its export decreased significantly by 19% annually. Basically, Spain's decline in exports was almost universal among all cut flower species. Only foliage showed a substantial increase of 10% annually.

**Figure 2.1 Spanish exports of cut flowers and foliage, 2001-2005, € thousands**



Source: Eurostat (2006)

### Opportunities and threats

It seems, based on the figures, that Spain is a very interesting market for developing country suppliers of cut flowers and foliage, because:

- It is the ninth largest EU importer of cut flowers and foliage;
- Spain's imports showed steady growth for the period reviewed, whilst its exports decreased considerably, turning the country into a net importer of cut flowers and foliage;
- Compared to other EU countries, The Netherlands has a less dominant position in its supply of flowers to Spain;
- The import value of developing countries increased annually by 6%, amounting to an import share of 44% in 2005. This is large compared to other EU countries;
- Spain sources its flowers in a wide variety of different developing countries.
- Spanish traders of course speak Spanish, making them interesting business partners for Latin American exporters.

### Useful sources

- EU Expanding Exports Helpdesk - <http://export-help.cec.eu.int/>  
Go to: trade statistics.
- Eurostat – official statistical office of the EU - <http://epp.eurostat.cec.eu.int>  
Go to: 'themes' on the left side of the home page - 'external trade' - 'data – full view' - 'external trade - detailed data'.

## 3. Trade structure

### Trade channels

Spain has a traditional market and its distribution system is characterised by a fragmented sales structure, a relatively low number of sales points and a lack of market-oriented operations. A large part of the local production is distributed through wholesale markets. There is also one very small auction, Mercamurcia, where locally grown flowers are traded. However, of all products, approximately 5% is traded through the central wholesale markets, 67% by individual wholesalers and direct trade between producers and retailers, and 15% by agricultural co-operatives. Florists buy 87% of their flowers from wholesalers.

According to FEPEX, no less than 65% of all wholesalers and retailers has organised themselves in regional associations and federations of associations. There is also one cooperation of local growers which uses an Internet-based system to enhance the distribution of their products.

The growing flower market in Spain has put the wholesale sector under pressure to modernize. Currently, the sector is experiencing changes to response to market demands. Assortments are widening and deepening. The number of wholesalers is increasing slightly.

Major wholesalers are: Delmaflor in Cabiz, Florclos in Barcelona, Wesseling España in Madrid, Tejido in Madrid and Terrades in Barcelona.

### Retail trade

Florists dominate the distribution of flowers in Spain. Approximately 83% of cut flowers is distributed by florists. Spain has 8,000 sales points for cut flowers and plants, of which 6,000 are represented by special flower shops. Their number is increasing.

Florists mostly sell flowers which are purchased as gifts (43%). This is related to the high share in turnover which is accounted for by mixed bouquets (43%) and the fact that, during large parts of the year, the Spanish warm climate does not favour buying flowers for own use because it deteriorates the vase life. The margins used by florists are generally high, consequently, flowers are considered as a luxury product.

The market share of supermarkets is among the lowest of all EU countries. The market share of garden centres is still low, but increasing. Consumers like to purchase flowers together with other products needed for their garden.

**Table 3.1 Leading retail channels, % of total sales, 2002-2003**

	2002	2003
Florists	81	80
Market/Street	8	8
Garden centres	3	4
Kiosks	3	2
Super-/Hypermarkets	1	1
Others	4	5
<b>Total</b>	<b>100</b>	<b>100</b>

Source: Flower Council of Holland (2005)

### Trends

- Initiatives to make flowers more accessible to consumers and make sales less dependent on special occasions are mostly undertaken by progressive entrepreneurs. They offer less traditional flowers and put a lot of effort into making more artistic bouquets and compositions. The emergence of franchise chains is also a sign of change from a traditional to a more modern market.
- Investments by supermarkets in the sales of flowers are still low.

### Useful sources

- Mercat de Flor y Planta Ornamental de Catalunya: <http://www.mercatflor.com>
- Mercabarna: <http://www.mercabarna.es>
- Mercaflor: <http://www.mercavalencia.es>
- Mercamurcia: <http://www.mercamurcia.es/>
- Federación española de empresarios floristas: <http://www.feef.info>
- Asociación española de centros de jardinería: <http://www.asociaciongardens.com>
- Interflora: <http://www.interflora.es>

## 4. Prices and margins

### Prices and margins

Prices paid for flowers are increasing in the long term. Between 1998 and 2003 average retail prices of mixed bouquets increased from € 15 to € 22. Retail prices of mono-bunches increased from € 9 to € 11 in the same period.

### Useful sources

Several Spanish wholesale markets publish prices, mostly on a weekly basis (see websites below). A few European organisations publish prices for finished plants on a regular basis. ITC in Geneva collects prices at the wholesale level on EU markets and publishes a weekly bulletin. The International Association of Horticultural Producers (AIPH) publishes information on prices and trends for plants in their statistical yearbook.

- Mercat de Flor i Planta ornamental de Catalunya: <http://www.mercatflor.com>
- Mercabarna: <http://www.mercabarna.es>
- Mercamurcia: <http://www.mercamurcia.es>
- ITC Market News Service (MNS): <http://www.intracen.org>
- International Association of Horticultural Producers: <http://www.aiph.org>

## 5. Market access requirements

As a manufacturer in a developing country preparing to access Spain, you should be aware of the market access requirements of your trading partners and the Spanish government. Requirements are demanded through legislation and through labels, codes and management



systems. These requirements are based on environmental, consumer health and safety and social concerns.

### Legislative requirements

Adherence to national legislation in EU countries is compulsory for all products traded within the country concerned. Therefore, as an exporter in a developing country you have to comply with the legislative requirements which are applicable to your products. For information on legislation for the market for cut flowers and foliage, go to 'Search CBI database' at <http://www.cbi.nl/marketinfo>, select your market sector, and the EU country of your interest in the category search, click on the search button and click on legislative requirements for an overview of all documents on legislation in your country of interest.

### Non-legislative requirements

Social, environmental and quality-related market requirements are of growing importance in international trade and are often requested by European buyers through labels, codes of conduct and management systems. For information on non-legislative requirements applicable to the market for cut flowers and foliage, go to 'Search CBI database' at <http://www.cbi.nl/marketinfo>, select your market sector and the EU country of your interest in the category search, click on the search button and click on your subject of interest under non-legislative requirements for an overview of all documents on the subject concerned in your country of interest.

### Packaging, marking and labelling

In general, the requirements for packaging marking and labelling should be determined in cooperation with the buyer or auction.

Refer to the CBI market survey covering the EU market for more information on packaging, marking and labelling.

### Tariffs and quota

Tariffs and quota applicable in Spain are the same as for the EU. Information regarding these market requirements can be found in the CBI market survey covering the EU market. The general VAT rate in Spain is 16% as of February 2006. However, the VAT rate generally applied to plants is 7%.

## 6. Business practices

For general information on business practices, exporters should refer to the survey covering the EU, CBI's Export Planner and CBI's Image Builder manual.

### Selecting a suitable trading partner

Finding a trade partner in Spain should not deviate from the general EU method as described in the survey covering the EU. Spanish importers search for new suppliers in developing countries by visiting the country of interest, through recommendations or sometimes through trade fairs. The most common ways for developing country exporters approaching Spanish customers are through direct (e)mail, personal visits as follow up, inviting potential Spanish customers to visit them in their country, building a network and visiting international trade fairs.

After obtaining contacts, evaluating potential trade partners should be done according to criteria such as information quality, geographic coverage, the kind of trade relation the partner is interested in, the position of the partner and the financial status and credibility.

### Coming to terms with your trade partner

As in the rest of Europe, both general offers and specific are common in Spain. Therefore, common practices as detailed in the survey covering the EU apply. When establishing an

overseas price for your products, factors to take into consideration are: competition, costs such as production, packaging, transportation and handling, promotion and selling expenses; the demand for your product or service and the maximum price which the market is willing to pay. Conformity to market prices depends on the product's novelty. How you price your product demands a good deal of thought and effort, since it directly affects your ability to make a profit.

The most commonly used terms in the flower trade are *open account* and *payment in advance*. Selling on open account carries the greatest risk for the exporter. Sometimes, initial export shipments are partly pre-paid before the products are shipped. In the case of co-operation agreements with overseas companies, payment terms could also include periodical payments.

Export terms of sale determine which costs are covered in the price of the cargo, at what point ownership transfers to the buyer and at what point responsibility for the cargo is transferred. The most commonly used term of sale is FOB (Free on Board). Under this term, the seller quotes a price for goods that includes the cost of loading at the port of departure. The buyer arranges for transportation and insurance. Less frequent are CFR (Cost and Freight) and CIF (Cost, Insurance, Freight). Special attention should also be given to contract fulfilment in reference to contingencies which might occur while the sale order is being processed, shipped etc.

### Cultural differences

A profound knowledge of the Spanish business culture is one of the main keys to a durable relationship. In spite of all modern communication tools, the personal relationship with a trading partner often decides a durable co-operation. Some key aspects are listed below.

- Spanish culture places a strong emphasis on personal pride. Therefore, causing loss of face through criticism or embarrassment should be avoided at all costs.
- Avoidance of uncertainty is a vital element of Spanish culture linked to the cautious approach the Spanish take towards new ideas. Spanish business managers generally prefer to have precise answers to questions and give precise instructions, in order to reduce conflict and any uncertainty.
- Hierarchy and position are extremely significant in Spanish business culture. The authority to make decisions rests with the individual who has the highest authority.
- Spanish business culture advocates subordinate initiative where problems are dealt with at lower levels first, before approaching superiors for assistance.
- An essential part of conducting business in Spain lies in establishing personal contacts. Generally speaking, the Spanish prefer to do business with those they are familiar with, so that obtaining personal contacts enables the negotiation process to advance more swiftly and successfully.
- The decision-making process in Spain is usually unhurried and can be a gradual one.
- The Spanish appreciate a more modest approach to business negotiations.
- Remain patient in all dealings with your Spanish counterparts. However, the 'mañana', i.e. "tomorrow" stereotype is not something often encountered in northern regions.
- Use basic titles of courtesy, Mr, Mrs, or Miss, followed by the surname, and professional titles, such as Dr, where known, particularly with older counterparts or those in the south of Spain. Also pay attention to surnames.
- Punctuality is expected of foreign visitors; however, you may sometimes find your Spanish counterparts arrive up to 30 minutes late.

Internet provides many sources on business practices and culture, such as <http://www.communicaid.com/spanish-business-culture.asp>. Please keep in mind that these pages only give general remarks. Therefore, when conducting business use your intuition and an understanding attitude.

## Sales promotion

Common practices of trade promotion should not differ considerably from other European countries. Although most Spanish people are able to speak English, it is of course preferable that export/sales personnel of your company is capable of speaking some Spanish. In general, good care should be taken of existing contacts, by using prompt, constant and reliable communication. Letters of inquiry should always be replied to. An essential tool used in sales is a detailed and up-to-date customer database.

Visiting and participating in a trade fair can be an efficient tool for communicating with prospective customers or even trading. It can also be an important source of information on market developments, production techniques and interesting varieties.

Assistance with market entry can also be sought through local business support organisations, import promotion organisations such as CBI and branch organisations focusing on the horticultural sector.

Please refer to CBI's Export planner and Your image builder for more information on this subject.

### *Trade associations*

- FEPEX (Federación Española de Asociaciones de Productores Exportadores de Frutas, Hortalizas, Flores y Plantas Vivas): <http://www.fepe.es>
- List of other national and regional Spanish horticultural associations: [http://www.fepe.es/publico/asociarse/Asociaciones.aspx?COD\\_SECTOR=18](http://www.fepe.es/publico/asociarse/Asociaciones.aspx?COD_SECTOR=18)

### *Trade fairs*

- Iberflora (International floricultural trade fair): [www.feriavalencia.com](http://www.feriavalencia.com)

### *Trade press*

- Horticultura Internacional / Horticom: <http://www.horticom.com>
- Verdiland Ediciones: <http://www.verdiland.com>
- Tecnipublicaciones: <http://www.tecnipublicaciones.com>
- Orophrys: [www.edicioneslav.es/orophrys/](http://www.edicioneslav.es/orophrys/)
- Flormarket: <http://www.infoagro.com/webs/verdimedia/index.htm>
- Ediciones de Horticultura: [http://www.ediho.es/ediciones\\_horticultura/](http://www.ediho.es/ediciones_horticultura/)

This survey was compiled for CBI by ProFound – Advisers in Development and Milco Rikken of ProVerde in collaboration with Mr. Jan Lanning.

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