CBI MARKET SURVEY

THE CUT FLOWERS AND FOLIAGE MARKET IN THE UNITED KINGDOM

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Report summary
This CBI market survey discusses, amongst others, the following highlights for the market for cut flowers and foliage in the United Kingdom:

- The United Kingdom is the second largest market for cut flowers and foliage in the EU. The value of the market has been increasing steadily for more than 10 years. The consumption level is expected to continue its upward trend. However, increases will probably no longer be as high as in the previous years.
- The UK is the second largest EU importer of cut flowers and foliage. The value of imports sourced directly in developing countries is considerable and increasing. Rosa, Dianthus and other fresh cut flowers are the most interesting product groups for developing countries in terms of import share and value.

This survey provides exporters of cut flowers and foliage with sector-specific market information related to gaining access to the United Kingdom. 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
The United Kingdom is the second largest market for cut flowers and foliage in the EU. The value of the market has been increasing steadily for more than 10 years. The current value of the market is € 2,667 million. Between 2001 and 2005, consumption increased by 4.5% annually. Because of the low level of penetration and the opportunities for development of sales channels, the consumption level is expected to keep rising. However, increases will probably no longer be as high as in the previous years.

The average expenditure on flowers was € 44 per capita in 2005. It is one of the highest in the EU. Although per capita consumption is high, the penetration of the market is relatively low. The share of the population buying flowers was only 41% in 2004 after an increase from 37% in 2001 to 44% in 2003. This indicates an extra high level of consumption by the people who purchase flowers. Two factors determine the total expenditure per purchasing consumer. One is price of purchases, which will be discussed in Chapter 4. The other one is purchasing frequency. The latter has increased from 21.3 in 2001 to 22.5 in 2004. This increase was mainly caused by an increase of mixed bouquet purchases. Purchases of mono-bunches, compositions and single flowers remained at approximately the same level. Considering total expenditure on flowers, mixed bouquets are also increasing in importance. Their share increased from 37% in 2001 to 46% in 2004. Mono-bunches, compositions and single flowers all lost share in total expenses. Nevertheless, mono-bunches still account for 48% of total flower sales.

Flowers are increasingly bought for own use. Between 2001 and 2004, flower purchases for own use increased from 43% to 48%. Flowers as gifts represented 38% of flower purchases in 2004. Flowers for funerals and graves represented 8%. Major occasions to give flowers away are birthdays (30%), thank you (13%), visits to sick people (10%), Mother's Day (9%) and weddings (9%).

Most consumers buy flowers on impulse. Another interesting fact is that almost half of all flower sales take place on Friday and Saturday.

Product groups

Since British people prefer a classical and cosy interior, they are most likely to choose bouquets mixed with traditional flowers (such as Rosa, Freesia, Dendranthema) in "sweet" colours (pink and purple). The preference for mixed bouquets to decorate the home explains the relatively high expenditure on flowers by the people who purchase flowers.

Important criteria influencing the choice of bouquets are freshness, scent and price. The colour of the bouquet has also become an important factor of influence in recent years.

Table 1.1 Top 10 Flowers in mono-bunches, 2001-2004

	2001	2002	2003	2004
Dianthus	34	33	25	27
Rosa	9	14	16	19
Dendranthema	16	17	14	15
Lilium	8	11	11	14
Tulipa	4	4	4	5
Freesia	5	5	4	4
Narcissus	5	3	3	4
Iris	1	1	1	1
Orchids	0	0	0	0
Gerbera	0	0	0	0
Other	18	13	22	11

Source: Horticultural Commodity Board

Dendranthema and Dianthus are popular because these species are relatively cheap and have a longer vase life compared to other species. In a recent consumer survey, however, many consumers also considered Dendranthema as the least beautiful flower.

Market segmentation

- The share of men purchasing flowers (37%) is significantly lower than the share of women who purchase flowers (63%). In general, men often purchase flowers only as presents while women also purchase them for own use.
- People between 25 and 65 spend considerably more on flowers than the remaining age groups in both absolute and relative figures. They represent 54% of the population and account for 71% of total expenditure on flowers.
- Florists derive approximately 25% of their turnover from the institutional market. The share of companies buying cut flowers increased from 11% in 1994 to 27% in 2002. More than 70% of companies purchase their flowers at a florist. Other purchasing channels are supermarkets (7%) and Interflora/Teleflora (5%).

Trends in consumption

- Consumption of mixed bouquets is increasing. It is becoming more common to purchase mixed bouquets for home decoration. The higher prices of mixed bouquets do not hamper the increase in sales of mixed bouquets.
- The popularity of Rosa bunches is increasing. Bunches of Lilium are also becoming more popular.

- A test in supermarkets pointed out that consumers would like to see more exotic flowers in mono-bunches as well as mixed bouquets. They also indicated that foliage made bouquets more beautiful.

Production

Total production

The UK production of cut flowers is estimated at € 65 million in 2005. The value of production has remained relatively stable since 2001. The total area for the production of flowers in the UK was estimated at approximately 6 thousand hectares in 2005. The size of the production area also remained relatively unchanged the past 10 years. Approximately 5.8 thousand hectares is open area and 0.2 thousand is protected. In England and Wales, the flowers are cultivated by about a thousand growers on a total area of approximately 4.8 thousand hectares, a large part of which is in the open air. The production is mainly for national use.

The main production areas in England are the Southwest, the East Midlands and Eastern England.

Table 1.2 Production of cut flowers in England and Wales, 2001-2005, volume in ha and value in € thousand

	2001		2002		2003		2004		2005	
	vol. (ha)	**Value** (€)	**Vol.** (ha)	**Value** (€)	**Vol.** (ha)	**Value** (€)	**Vol.** (ha)	**Value** (€)	**Vol.** (ha)	**Value** (€)
Cut flowers open area										
Narcissi	3,298	19,794	3,900	19,984	3,890	20,492	3,900	20,781	3,900	21,267
Gladioli	154		100		93		130		130	
Other cut flowers	607	19,468	662	19,324	666	19,167	638	19,776	630	19,752
Total	**4,059**	**39,263**	**4,622**	**39,308**	**4,649**	**39,659**	**4,668**	**40,557**	**4,660**	**41,019**
Cut flowers under glass										
Dianthus	4	387	5	667	5	519	5	366	7	492
Alstroemeria	21	8,697	19	8,424	18	7,722	18	7,708	16	9,484
Dendranthema	59	10,421	48	6,021	46	7,145	43	8,455	13	6,721
Other cut flowers	53	6,495	55	7,685	53	6,704	52	5,680	50	6,034
Total	**137**	**29,162**	**127**	**24,685**	**122**	**23,722**	**118**	**24,059**	**104**	**23,549**

Source: Flower Council of Holland (2005)

The area of cultivation under glass in England (amongst others on the Channel Islands) and Wales decreased from 270 hectares in 1994 to 104 hectares in 2005. This was mainly due to the decreasing area of cultivation for Dendranthema.

Trends in production

Many growers in the UK lack capital and their materials are mostly outdated. As a result, the number of growers declines. The remaining growers have increased their scales. Average scales of growers in England increased from 3.3 hectares in 1995 to 5.5 hectares in 2004.

A long-term trend over a period of 10 years is the decrease in production of cut flowers and an increase in the production of hardy ornamental nursery stock. This indicates a switch from the former to the latter.

Opportunities and threats

In general, the market for cut flowers in the UK has experienced healthy growth in recent years and has almost become as big as the number one market in the EU, Germany. Moreover, the low penetration level offers room for continued growth.

Exporters of ready-to-use flower bunches are offered good opportunities by the increased popularity of mixed bouquets. These products have more added value and give higher returns. Exotic flowers also offer good opportunities, especially when they are offered in combination with an appropriate vase.

Production of cut flowers in the UK has been under pressure. Total production area and value decreased. However, scale increases, and probably other improvements as well, have stabilised production value.

Useful sources
- Flowers and Plants Association: http://www.flowers.org.uk
- Horticultural Development Authority: http://www.hdc.org.uk
- Flower Council of Holland: http://www.flowercouncil.org/uk/
- Commercial Horticultural Association: http://www.cha-hort.com
- Find growers: http://www.flowers.org.uk/industry/whos-who.htm

2. Trade: imports and exports

Imports
The UK is a key player in the trade of cut flowers and foliage. The UK is the second largest EU importer of cut flowers and foliage, accounting for 23% of total EU imports. Its total imports increased by 15% between 2001 and 2005, amounting to € 761.2 million in 2005.

The value of imports sourced in developing countries increased by 5% annually between 2001 and 2005, amounting to € 141 million in 2005. This equals a considerable share of 19% in supplies to the UK by developing countries. The UK sources its flowers from a rather large number of different developing countries. Its most important developing country suppliers are Kenya (10%) and Colombia (6%). South Africa, now accounting for an import share of 0.6%, experienced the strongest relative growth for the period 2001-2005 (+79% annually).

The main EU supplier is The Netherlands (77%), followed at a distance by Spain (3%) and Belgium (1%). The Netherlands saw its export increase by 5% annually. Spain and Belgium saw their exports to the UK decline between 2001 and 2005, by 16% and 15% annually respectively.

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

Product	2001 € mln	2005 € mln	Leading Suppliers in 2005 share in %		Share in UK imports
Total cut flowers and foliage	661.8	761.2	Intra-EU:	The Netherlands (77), Spain (3)	81%
			Extra-EU excl DC:	Israel (1)	1%
			DC*:	Kenya (10), Colombia (6), Turkey (1)	19%
Rosa	75.1	109.7	Intra-EU:	The Netherlands (70), Germany (1)	71%
			Extra-EU excl DC:	Israel (0.1)	0.1%
			DC*:	Kenya (26), Colombia (1), Uganda (0.5).	29%
Dianthus	101.8	98.1	Intra-EU:	The Netherlands (18), Spain (15) Austria (1)	35%
			Extra-EU excl DC:	Israel (0.1)	0.1%
			DC*:	Colombia (39),Kenya (19), Turkey (6)	65%
Orchids	3.7	10.7	Intra-EU:	Netherlands (85), Ireland (6)	91%
			Extra-EU excl DC:	Taiwan (4.5), New Zealand	4.5%
			DC*:	Thailand (4)	4.5%
Gladiolus	1.6	1.9	Intra-EU:	The Netherlands (77),Denmark	80%

Product	2001 € mln	2005 € mln	Leading Suppliers in 2005 share in %		Share in UK imports
			Extra-EU excl DC: DC*:	(2) Israel (2) Colombia (11), Kenya (5), Malaysia (1)	2% 18%
Dendranthema	97.1	143.4	Intra-EU: Extra-EU excl DC: DC*:	The Netherlands (98), Spain (1) South Africa (0.5)	99% 0% 1%
Other fresh cut flowers	351.1	378.7	Intra-EU: Extra-EU excl DC: DC*:	The Netherlands (86), Belgium (1) Israel (1) Kenya (8), South Africa (1)	89% 1% 10%
Prepared cut flowers	26.5	12.3	Intra-EU: Extra-EU excl DC: DC*:	The Netherlands (76), Italy (1), Spain (1) USA (1), Taiwan (0.5) China (5), India (5), Colombia (4), Philippines (3), Sri Lanka (12)	78% 1% 20%
Foliage	4.9	6.3	Intra-EU: Extra-EU excl DC: DC*:	The Netherlands (31), Italy (12), Ireland (3) Hong Kong (1), USA (1) India (23), China (11), Philippines (9), Thailand (4), South Africa (3)	47% 2% 51%

Source: Eurostat (2006)
*Developing Countries

Imports by product group

In the period reviewed, only imports of Dianthus (1% annually) and prepared cut flowers (17%) decreased. Imports of Orchids showed the strongest relative growth between 2001 and 2005 (30% annually). Most of this growth can be contributed to the constant supply of Orchids (mainly Cymbidium, but also Dendrobium, Phalaenopsis, Oncidium and other cut Orchids) from The Netherlands: they already account for 85% of UK's imports of this product group and between 2001 and 2005 their share increased annually by 50%. Between 2001 and 2005, the developing countries' import share increased strongly for Dendranthema (25% annually) and foliage (22%). Their presence decreased sharply in the supply of Gladiolus (14% annually), Orchids (22%) and prepared cut flowers (23%).

Rosa, Dianthus and other fresh cut flowers are the most interesting product groups for developing countries in terms of import share and value. Although prepared cut flowers and foliage are less interesting product groups in terms of value, it is interesting to note that various developing countries supply these product groups to the UK. In contrast to the other product groups, prepared cut flowers and foliage are not entirely dominated by Kenya and Colombia.

Total UK imports of Rosa increased annually by 10% amounting to € 110 million, whilst imports from developing countries remained stable, amounting to € 31.5 million in 2005. Kenya is the largest developing country supplier of Rosa to the UK (€ 28.4 million) with still-increasing exports (5% annually) for the period 2001-2005. Colombia, the second largest supplier of Rosa to the UK, saw its export decline by 21% annually between 2001 and 2005.

Total UK imports of Dianthus decreased slightly by 1% amounting to € 98.1 million in 2005. Colombia is the largest supplier of Dianthus, accounting for 39% of UK imports of this product group, valued at € 38.2 million in 2005. Colombia's supply of Dianthus to the UK decreased slightly by 3% annually for the period 2001-2005. Kenya, the second largest supplier of

Dianthus to the UK, experienced strong annual growth (14%), amounting to € 18.3 million in 2005.

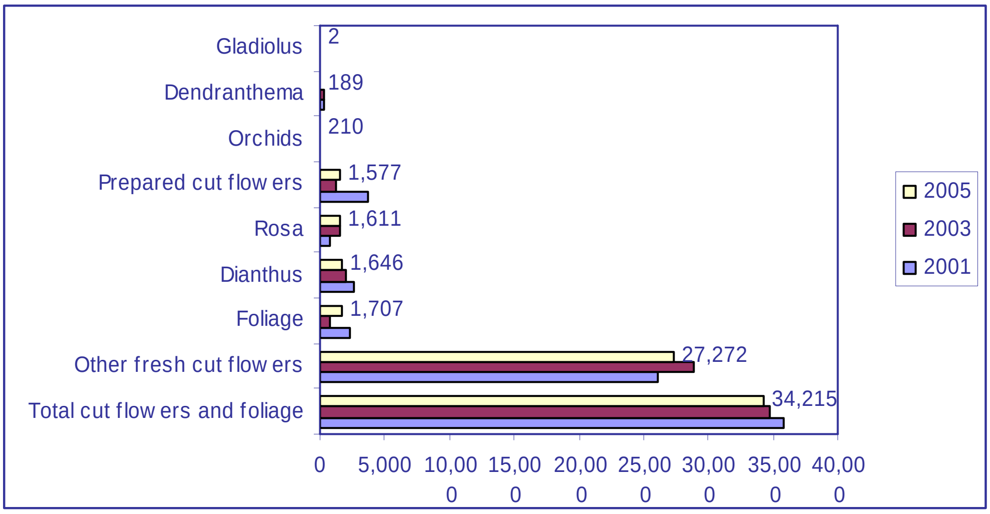
Other fresh cut flowers account for the largest part of the UK's imports. While The Netherlands is by far the largest supplier of this product group to the UK, imports from developing countries increased by 28% annually between 2001 and 2005. Imports from Kenya, the second largest supplier of other fresh cut flowers, increased most, by 27% annually, amounting to € 7.2 million in 2005. South Africa, the second largest developing country supplier, experienced the strongest relative growth, with an annual increase of 108% amounting to € 3.4 million in 2005.

Exports

Ranked only as the sixth largest exporter of cut flowers and foliage in the EU, the UK is a net importer of cut flowers and foliage. Its exports decreased further by 4% amounting to € 42.3 million in 2005. The leading three export destinations for UK exports are The Netherlands (€ 18.0 million), Ireland (€ 12.5 million) and Denmark (€ 1.6 million). However, exports to the latter country decreased sharply between 2001 and 2005.

As can be seen in Figure 2.1, UK exports are mainly composed of 'other fresh cut flowers' (mainly Narcissus). The UK used to export a considerable percentage of its flowers as prepared cut flowers, but this decreased by 58% between 2001 and 2005.

Figure 2.1 UK exports of cut flowers and foliage, 2001-2005, in € thousands



Source: Eurostat (2006)

Opportunities and threats

The UK is an interesting market for developing country suppliers of cut flowers and foliage, because of the following reasons:

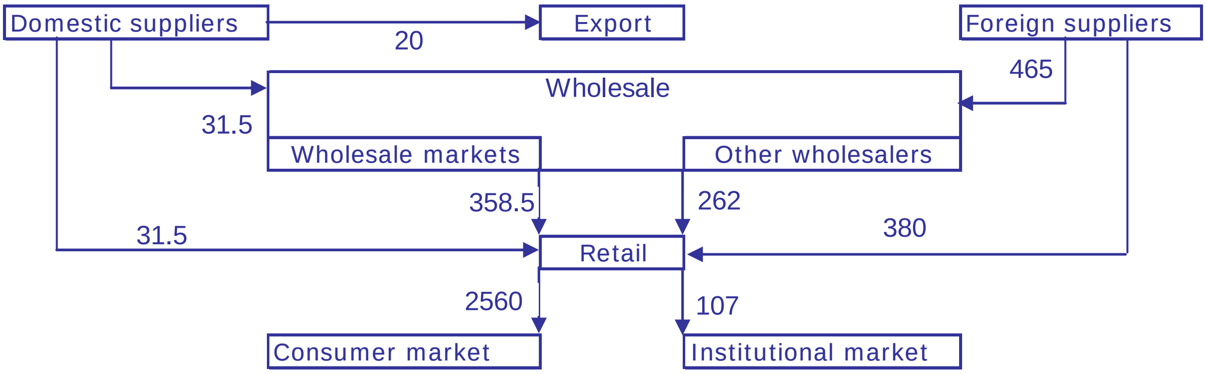
- It is the second largest EU importer of cut flowers and foliage and its imports still showed continuous strong growth between 2001 and 2005 (+15%);
- The import value of developing countries increased annually by 5%, amounting to an import share of 19% in 2005;
- Although Kenya and Colombia are by far the most important developing country suppliers of flowers and foliage to the UK, many other developing countries are represented, especially in the supply of prepared cut flowers and foliage.
- Besides The Netherlands, the UK is one of the European countries which has a number of large importing companies specialised in sourcing products in developing countries. Their main market channels are supermarkets.

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

Figure 3.1 Distribution of flowers in The United Kingdom, 2005, in million



Note: Figures are indications and can only be applied to get an idea of the relative importance of different trade channels.

No clear distribution chain for cut flowers exists in the United Kingdom. At the wholesale level, flowers are traded through the 35 wholesale markets or through import wholesalers. The larger supermarket chains, due to their enormous buying power, have directly influenced the way products are sourced. This has caused changes in the distribution chain leading to implications even in African supplying countries like Kenya. Some large UK-based import wholesalers are specialised in supplying these supermarket channels. An example is World Flowers (part of Oserian Group) which has own production in Kenya and imports from associated farmers in, for instance, Kenya, Zimbabwe, Zambia and Uganda. Most of these products are destined for UK supermarkets like Tesco and Waitrose.

Wholesalers expect growers, importers, wholesalers outside wholesale markets and supermarkets to become more important chains in the distribution of flowers in the future. Wholesale markets, florists and street markets are expected to decrease in importance. According to the Flower Council of Holland, the number of traditional wholesalers will decrease from 450 to 350. Wholesalers offering extra good opportunities to flower exporters are packers supplying directly to supermarkets.

Major wholesalers are: C. Zwetsloot in Sendy Bedfordshire, World Flowers in North Warnborough-Hookhants, Winchester Growers in Pinchbeck-Spalding, Lingarden Flower Sales in Weston-Spalding, Lincolnshire and John Austin in Londen.

Retail trade

Supermarkets are the leading sales channel for flowers in the UK. With a 65% share in 2004, supermarkets in the UK play a significantly more important role than in other EU markets. Their market share is expected to remain at this level in the future.

Table 3.1 Share of retail channels in the UK, % of total sales, 2000-2004

	2001	2002	2003	2004
Supermarkets	58	60	64	65

Florists	30	27	25	24
Street and market	6	6	5	5
Garden centres / Growers	2	3	2	2
Others	4	4	4	4
Total	**100**	**100**	**100**	**100**

Source: Flower Council of Holland (2005)

The approximately 7,000 florists in the UK are facing a declining market share. Nevertheless, as the total UK consumption showed a strong increase, the florists still managed to expand their sales in absolute terms. They are becoming more professional by offering better service, quality and knowledge. The major purchasing channels are wholesale markets, where 48% of florists purchase flowers. Other major channels are wholesalers supplying directly from their trucks (38%) and exporters in The Netherlands (30%). The leading organisations of florists are Interflora and Teleflora. 32% and 27% of florists are associated with these organisations respectively.

Supermarket chains are growing fast. The major supermarkets are Tesco, Sainsbury, Safeway, Asda and Marks & Spencer. Consumers mainly purchase flowers at supermarkets because of the convenience, attractive offers and vase life guarantee.

Trends

As supermarkets have become the main sales channel and often prefer to source directly at growers, shorter distribution lines are increasing in importance. Supermarkets are actively seeking reliable suppliers.

Useful sources

- Flower Importer Trade Association (FITA): knaccutchan@freshlife.co.uk
- The Fresh Produce Consortium: http://www.freshproduce.org.uk
- Flower and Plants Association: http://www.flowers.org.uk
- International Floriculture Online Report: http://www.pathfastpublishing.com
- New Covent Garden Market: http://www.cgma.gov.uk
- New Smithfield Market: http://www.manchester.gov.uk/markets/wholesale/

4. Prices and margins

Prices and margins

The Netherlands auctions set the price for most flowers sold in the UK. This is because many of the flowers traded in the UK have passed through the Netherlands auction system or have been supplied by Netherlands wholesalers. Refer to the VBN statistical yearbook for average prices paid for the products auctioned: http://www.vbn.nl.

Between 2001 and 2004, retail prices of flowers increased by 4.2% annually.

Table 4.1 Retail prices of flowers, 2001-2004, in €

	2001	2002	2003	2004
Mono-bunches	3.30	3.45	3.70	3.67
Mixed bouquets	6.89	7.13	7.51	7.84
Compositions	20.20	19.37	15.14	26.15
Total	**4.53**	**4.73**	**4.99**	**5.14**

Currency converted from £ to €: £ 1 = € 1.4818 (exchange rate October 2006)
Source: Horticultural Commodity Board (2005)

Useful sources

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.

- ITC Market News Service (MNS): http://www.intracen.org
- International Association of Horticultural Producers: http://www.aiph.org

5. Market access requirements

As a grower in a developing country preparing to access the UK, you should be aware of the market access requirements of your trading partners and the UK 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

Packaging can serve two functions. First, it protects plants from damage during transport. Second, consumer packaging can improve presentation of a product. However, consumer packaging rarely takes place in supplying countries as it often increases volume and subsequently transport costs. Packaging specifications should always be set in consultation with the buyer.

Tariffs and quota

For information on import tariffs, please refer to the CBI market survey covering the EU market. The general VAT rate in the United Kingdom, which is also applied to flowers, is 17.5% as of February 2006.

6. Business practices

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

Selecting a suitable trading partner

Finding a trade partner in the United Kingdom should not deviate from the general EU method as described in the CBI market survey covering the EU market. UK importers look for new suppliers in developing countries by visiting the country of interest, through recommendations or through trade fairs. The most common ways for developing country exporters to approach UK customers are through direct (e)mail, personal visits as follow up, inviting potential UK customers to visit them, 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 specific and general offers are common in the United Kingdom. Therefore, common practices as detailed in the CBI market survey covering the EU market apply. When establishing an overseas price for your products, factors involved 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 is worth 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 determining 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 which includes the cost of loading at the port of departure. The buyer arranges for transportation and insurance. CFR (Cost and Freight) and CIF (Cost, Insurance, Freight) are less frequently used terms. 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 British 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. The general business culture of the United Kingdom is described below:

- Polite, direct with an understated use of language;
- Treats counterpart as equal but expects respect for achieved status/position. Wait till your counterpart assigns you a seat;
- Extremely task-oriented – 'hello, nice to meet you' and then straight to the point: this can confuse an exporter, who thinks his trading partner is relationship building; however the questions are purely ritual and over very quickly;
- A British trading partner will give the exporter the opportunity to sell himself, his company and his products;
- He will be interested in the track record/achievements of your company and your products;
- When convinced, he will be prepared to give it a try on the basis of a trial shipment;
- He becomes slightly irritated by small talk and formalities and likes to get down to business; do not talk about politics, religion and private/family matters;
- He expects his counterparts to have their own opinion and voice it, even when he does do not agree with it;
- He expects counterparts to take initiative and expects assertive communication.

Many sources on business practices and culture can be found on Internet, such as http://www.communicaid.com/british-business-culture.asp. Please keep in mind that the above concerns general remarks and therefore, in conducting business an understanding attitude is called for.

Sales promotion
Common practices of trade promotion should not differ considerable from other European countries. English is the common language used during negotiation. 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.

In the case of flowers, some importers in the United Kingdom are not in favour of trade fairs as a means to promote suppliers from developing countries. However, their opinion is not truly objective as they are threatened by the increasing exclusion of the middle chains in the distribution chain. Visiting or even participating in a trade fair can be an efficient tool for communicating with prospective customers. It can also be a valuable 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 flower sector.

Trade associations
- Flowers and plants association: http://www.flowers.org.uk
- Institute of Horticulture: http://www.horticulture.org.uk
- Horticultural Trades Association (HTA): http://www.the-hta.org.uk
- Horticultural Development Council (HDC): http://www.hdc.org.uk
- Commercial Horticultural Association: http://www.cha-hort.com

Trade fairs
- Four Oaks Trade Show (horticultural trade fair): http://www.fouroaks-tradeshow.com
- Chelsea Flower Show (floricultural trade fair): http://www.rhs.org.uk
- Spring Flower Show (flower show): http://www.flowershow.org.uk
- Spring Florist Event (floriculture wholesale and retail show): http://www.springfloristevent.co.uk
- Full overview of UK trade shows: http://www.cha-hort.com/uk_trade_shows.htm

Trade press
- Florist & Wholesale Buyer: http://www.masterflorist.com
- Grower: http://www.nexusmedia.com
- Nurseryman & Garden Centre: http://www.nexusmedia.com
- Horticulture Week: http://www.hortweek.com
- Comm. Greenhouse Grower: http://www.actpub.co.uk/greenhousegrower.htm

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