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Rabobank International**Food & Agribusiness
Research and Advisory**

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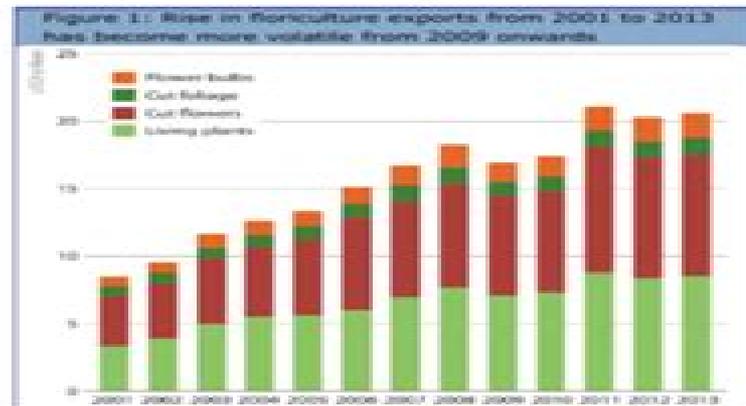
Gearing Up for Stronger Competition

Rabobank's World Floriculture map 2015 illustrates that low-cost cut flower exporting countries close to the equator, such as Kenya, Ethiopia, Ecuador, Colombia and Malaysia, have increased their global market share in cut flower trade. These cost-efficient producers are strengthening their position in global production and trade, mainly driven by favourable growing circumstances, rising demand for competitively priced flowers in the main destination markets and improved logistics, including transportation by sea container. High-cost growers who do not want to sit on thorns need to differentiate themselves from low-cost competitors, or themselves become active in these low-cost regions.

Floriculture trade becoming more turbulent and international

Economic and financial turmoil—mainly in North America and Western Europe—has impacted global floriculture trade. The historically strong growth in global floriculture exports has taken a bumpier road from 2009 onwards (see Figure 1). In 2013, global exports of cut flowers, cut foliage, living plants and flower bulbs amounted to USD 20.6 billion as against USD 21.1 billion in 2011 and nearly USD 8.5 billion in 2001.

Cut flowers, which are traded worldwide, have always been the main group within global floriculture trade, followed by living plants, which are traded more regionally. As geographic expansion of cut flower production as well as further developments in logistics make long-haul transportation more viable, the share of cut flowers in floriculture trade will likely grow.



Competitive playing field in cut flowers is changing

One of the main structural changes currently taking place in the world of floriculture is the increase in international competition, particularly for cut flowers. With a combination of locally produced flowers and imported flowers, the Netherlands is a dominant central market for global cut flower trade. However, the Dutch share in global cut flower exports is decreasing, declining from 58 percent in 2003 to 52 percent in 2013 (see Figure 2). At the same time, Kenya, Ecuador, Ethiopia, Colombia and Malaysia have increased their share in

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