BACKING BRITISH BLOOMS

THE STATE OF THE BRITISH CUT FLOWER INDUSTRY

June 2016

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Introduction

I can remember vividly the first bouquet of cut flowers I was ever sent. It was my 13th birthday and my Uncle had ordered them to be delivered to my home that day. When they arrived, I couldn't believe that they were for me: they were so unexpected and beautiful – a gift that 'grown-ups' get. I felt privileged beyond measure. And so began my love affair with cut flowers.

Little did I realise that 15 years later I would be working in horticulture looking at ways the UK can boost its domestic production of cut flowers.

Since the late 1980s, the value of British cut flowers has stayed roughly the same, rising from around £79m in 1988 to £82m in 2015. Meanwhile, the value of cut flower imports rose from £122m to £666m over the same time period. Import substitution has long since been the ambition for British growers, but the highly subsidised Dutch imports and logistical prowess of exporters from the Dutch markets have made competing on price unsustainable.

But British flower farming is at a turning point. After years of playing second fiddle to the import industry, the competitive landscape is slowly shifting back in the favour of the British grower. The rising prices at the Dutch auctions coupled with an increase in consumer awareness and demand for seasonal British flower makes the British market increasingly competitive and desirable.

True, there are still challenges to overcome, and these are outlined in this report, but the time is ripe to capture back some of the UK cut flower and indoor plant market which is worth £2.2 billion at retail level.

Cut flowers have the innate ability to make a house feel like a home and provide a more attractive and uplifting environment. Be it a kind gesture or a token of love, cut flowers are a huge part of our psyche.

This report explores the changes we have seen in the British cut flower industry in recent decades; analyses the official government data to develop a picture of the current cut flower market; investigates the strengths and limitations of different parts of the supply chain in supporting the British-grown market and details a list of 'Asks' that need to be addressed to help the British cut flower sector reach its full potential.

Amy Gray

NFU Horticultural Adviser (Ornamentals, Fruit and Protected Edibles)

A BRIEF HISTORY OF THE BRITISH CUT FLOWER SECTOR

The profile of the British cut flower sector has changed markedly over the last fifty years. Originally, domestic cut flower production occupied the majority of the market. But in intervening years, imports have steadily increased to dominate the system with the Dutch widely recognised as the driving force.

In the 1950s, the Dutch Government embarked on a programme of purchasing economically unviable farms and then selling or leasing them back to more successful farmers. This was followed by a series of state-led subsidies designed to improve the investment into horticultural production and drive an increase in profitability.

Dutch flower growers were able to upgrade their businesses and in many cases, expand their enterprises, becoming more efficient in the process. As a result, the Dutch were able to produce flowers at a lower price than their less efficient competitors re-investing their returns into improving their businesses through technology and research. This kept them a step ahead of the competition.

And so, the rise of the Dutch flower trade began in earnest.

In the 1980s, the Dutch cut flower sector was thriving. Thanks to their famous auction system, they became formidable exporters. Dutch produce began to permeate the UK: a development that, at the time, was widely welcomed by British florists who were keen to set themselves apart by working with new non-British flowers while also finding savings on competing products.

At the same time, the major supermarkets were making their presence known on a national scale, growing in significance to eventually become the major force on the cut flower scene, now occupying almost 60% of UK sales today.

In response, consumer buying habits started changing, and cut flowers began to be perceived as more of a commodity than a special occasion purchase. As a result, cut flower sales increased dramatically between the late 1980s and early 2000s and imports took the brunt of this new market, rising from around £125m per annum to £550m. Meanwhile, British farm gate prices remained relatively static.

As a result of the substantial returns generated from their successful export trade, the Dutch industry continued to grow with some 9250 flower nurseries producing 8 billion blooms and 1900 flower exporters selling them at its peak in the mid '90s.

Meanwhile, many British growers were unable to cope. In the 1970's there were over 120 Chrysanthemum growers producing some 60 million stems a year. By 2013, there were only 3 professional Chrysanthemum growers left and no Carnation & Spray Carnation growers at all. A combination of high energy costs, supermarket price pressure, cheap imports, indifference towards flower provenance and lack of government schemes to boost the sector resulted in many growers going out of business or diversifying to other crops.

But interestingly, British growers are now starting to see a change.

With Dutch subsidies being phased out, their growers are now facing rising production costs (labour, energy, land and greenhouse construction) which are starting to have an impact. Glasshouse production has been particularly impacted and production is now falling, resulting in price inflation at the auctions, both for Dutch grown and 3rd country imports who base the value of their flowers on the value of the Dutch equivalents.

Some argue that this could be the start of an opportunity for the British cut flower market.

OFFICIAL STATISTICS

There have been a number of Government-led data surveys over the years that have collected information on the cut flower sector. However, it is important to recognise that there are significant limitations with the existing data sources.

Firstly, Government statistics have evolved over time, resulting in a gradual erosion of consistency between annual figures. In some cases, data that was previously collected in distinct streams became amalgamated into other datasets making it impossible to tease apart. In others, the data collection was abandoned altogether.

There are also difficulties when different data sources are collected over different geographical regions (e.g. UK data vs. British data) making meaningful comparisons difficult.

As a result, finding official information on the structure and state of the British cut flower sector can be challenging.

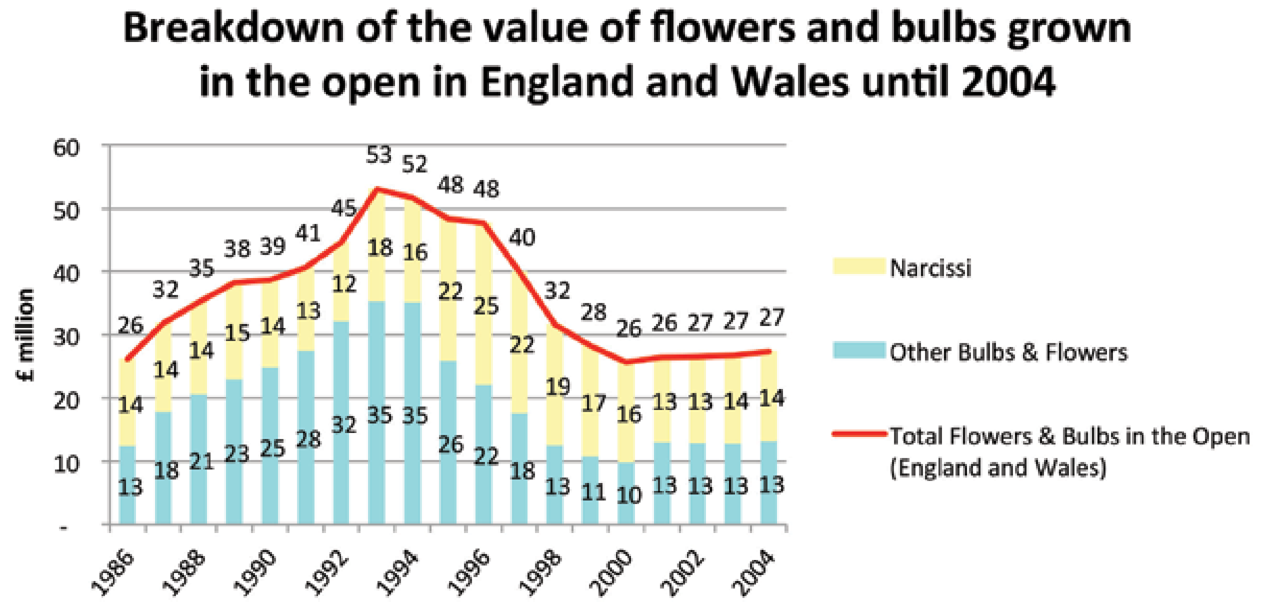
The major Governmental sources of data can be found below:

	LAST PUBLISHED	LOCATION OF CUT FLOWER DATA	KEY POINTS
Basic Horticultural Statistics	July 2015	Page 23 Section 6	• Area until 2004 (England and Wales). • Production until 2004 (England and Wales). • Imports up to 2013 (UK). • Exports up to 2013 (UK). • "More recent ornamental statistics can be seen in table 7.10 of Agriculture in the United Kingdom".
Agriculture in the United Kingdom	May 2016	Page 48 Table 7.10	• Value of production of flowers and bulbs in the open, including forced flower bulbs (UK). • Value of production of protected crops (UK). • Value of imports (UK). • Value of exports (UK).
Farming Statistics	December 2015	Page 13 Table 5 Page 13 Table 6	• Area of bulbs and flowers grown in the open (includes low plastic tunnels and French and Spanish tunnels) (UK). • Area of Flowers, foliage and other plants under glass (UK).
Horticulture Statistics 2014	July 2015	Page 6 Figure 5	• Value of flowers and bulbs grown in open (UK). • Value of protected crops (UK).
Survey of Vegetables and Flowers	January 2009	Page 5 Table 4	• Area of bulbs and flowers grown in the open, broken down to genera and other broad categories (England) • Published annually until 2006 and then once again in 2008.

VALUE OF CUT FLOWERS TO THE BRITISH ECONOMY

The Value of flowers and bulbs grown in the open

Figure 1



Up until 2004, data on the value of "Flowers and bulbs grown in the open" (E&W) was broken down into two categories in the Basic Horticultural Statistics:

1. **Narcisi; and**
2. **Other bulbs and flowers.**

The AHDB estimates that around half of narcissi grown in the open are for cut flower purposes. As such, we can deduce that the value of narcissi grown for cut flowers had a value of £7m in 2004 putting **the value of cut flowers grown in the open in 2004 at £20m.**

Post-2004, this detailed information ceased to be collected. From that point, the only data published on the value of flowers and plants grown in the open was for the UK (not England and Wales).

Comparison of the two time series (E&W and UK) shows a good correlation (Figure 2).

Technically, it is impossible to tease apart the E&W time series from the broader UK category. However, if we assume that the proportion of narcissi to other bulbs and flowers remains the same, we can extrapolate that the value of narcissi in the UK in 2015 was £23m and the value of other bulbs and flowers was £22m.

Using the same assumption that half narcissi grown in the open were for cut flower production, we can deduce that, in 2015, **the value of flowers and bulbs grown in the open for cut flowers in the UK was £34m.**

Figure 2

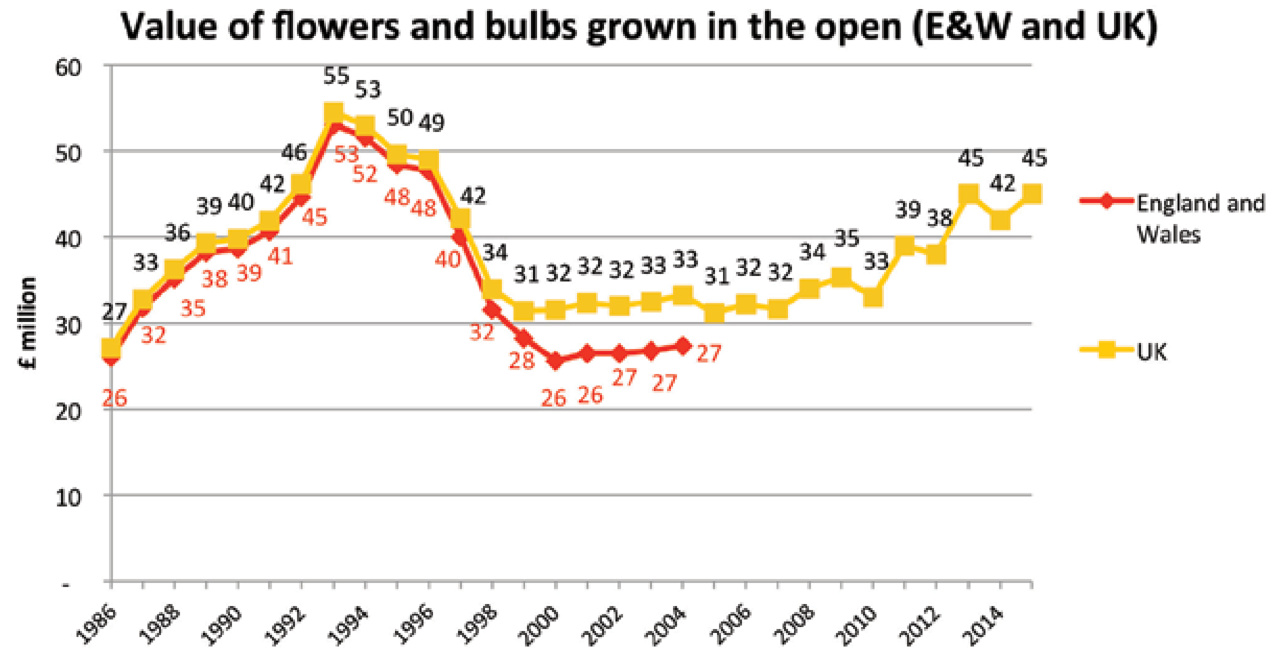


Figure 3

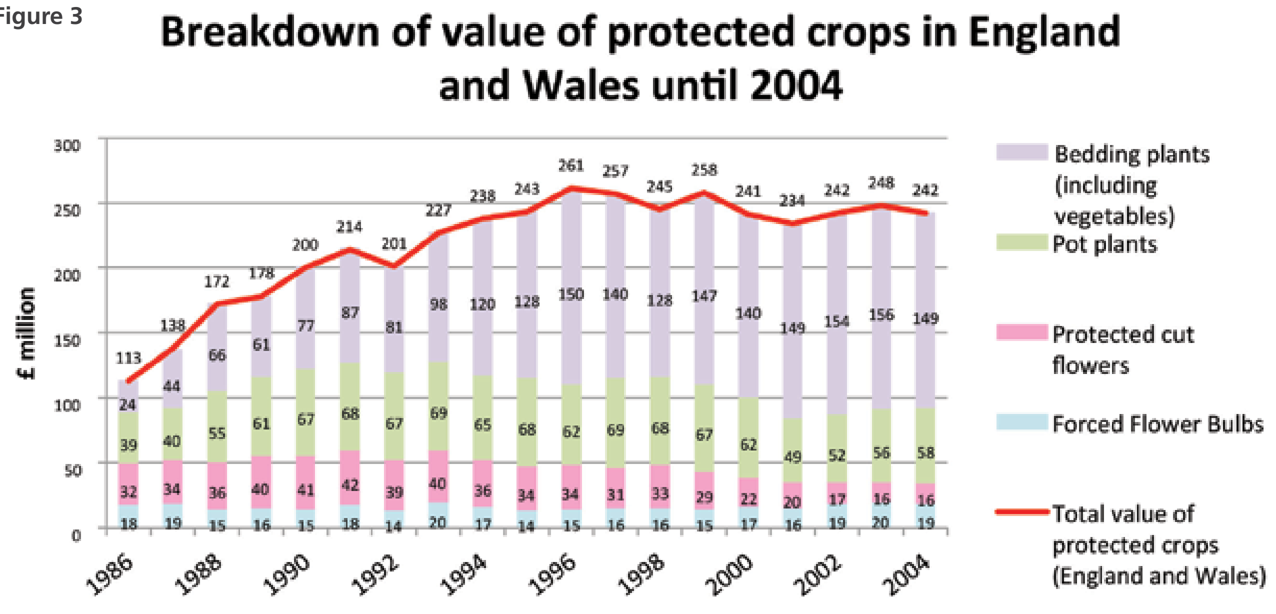
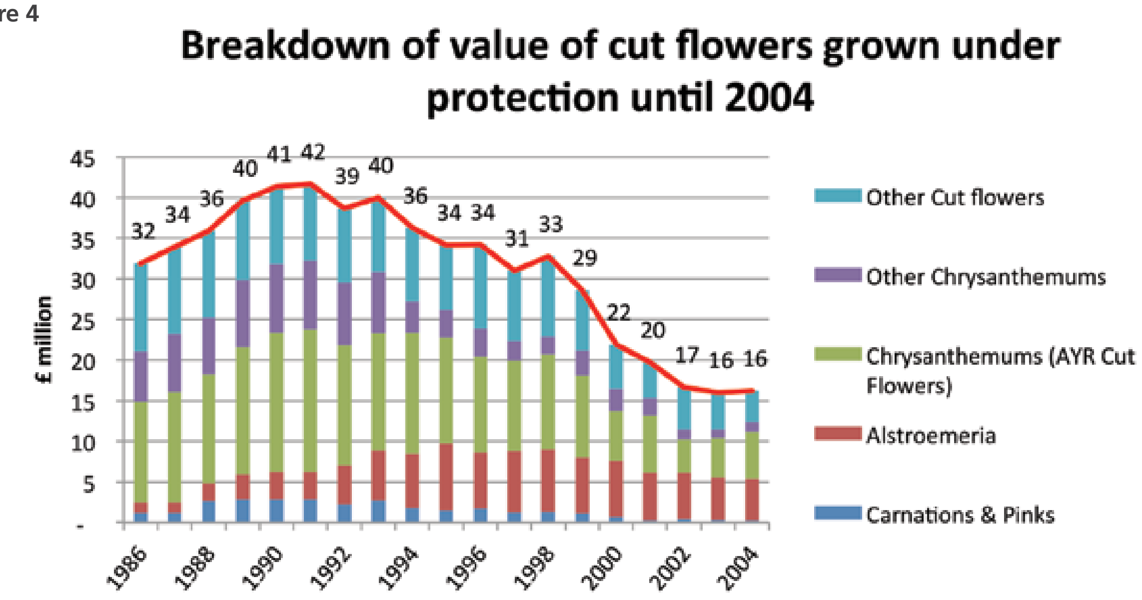


Figure 4 further breaks down the "protected cut flowers" category into different flower lines.

Figure 4



The Value of protected crops

Up until 2004, Basic Horticultural Statistics for **Protected crops** (E&W) provided information on four main protected crop categories (Figure 3):

1. **Forced Flower Bulbs;**
2. **Cut Flowers;**
3. **Pot Plants; and**
4. **Bedding Plants (including vegetables).**

In addition, it was also possible to determine the value of specific categories of Cut Flowers (Figure 4):

a. **Carnations & Pinks**
b. **Alstroemeria**
c. **Chrysanthemums (AYR Cut Flowers)**
d. **Other Chrysanthemums**
e. **Other Cut flowers**

To determine the value of cut flowers grown in the open, we must establish the proportion of cut flowers within these categories.

Looking at Figure 3, the value of protected cut flowers in 2004 was £16m and the value of forced flower bulbs was £19m putting the **value of cut flowers grown under protection in 2004 at £35m.**

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Figure 5

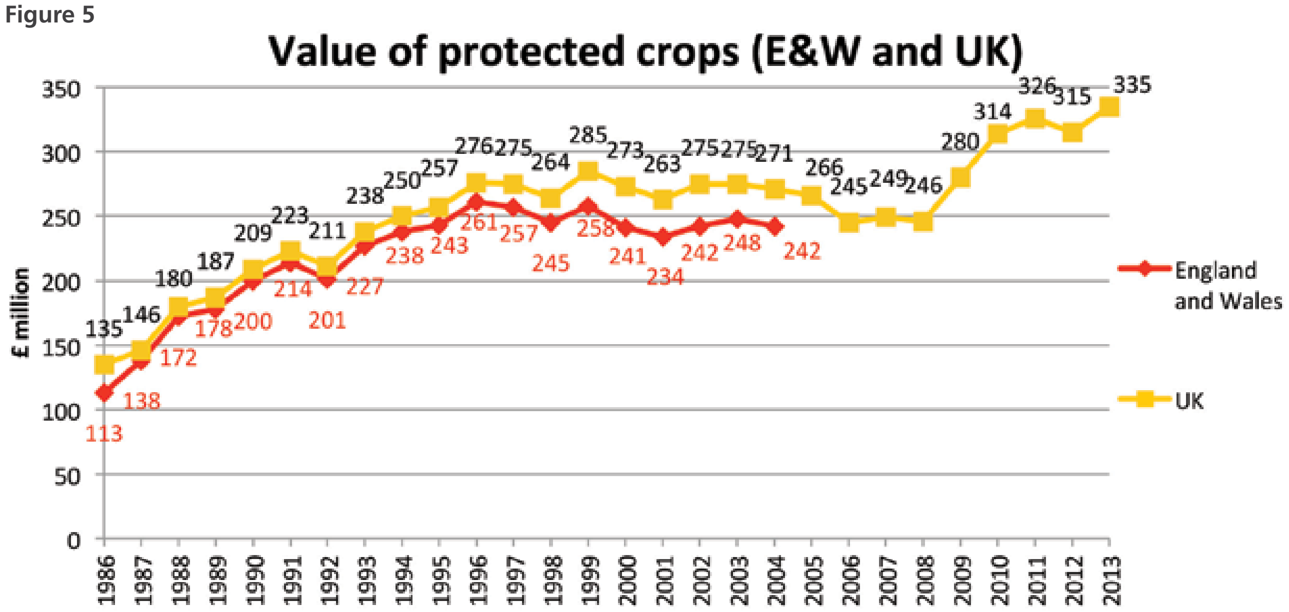
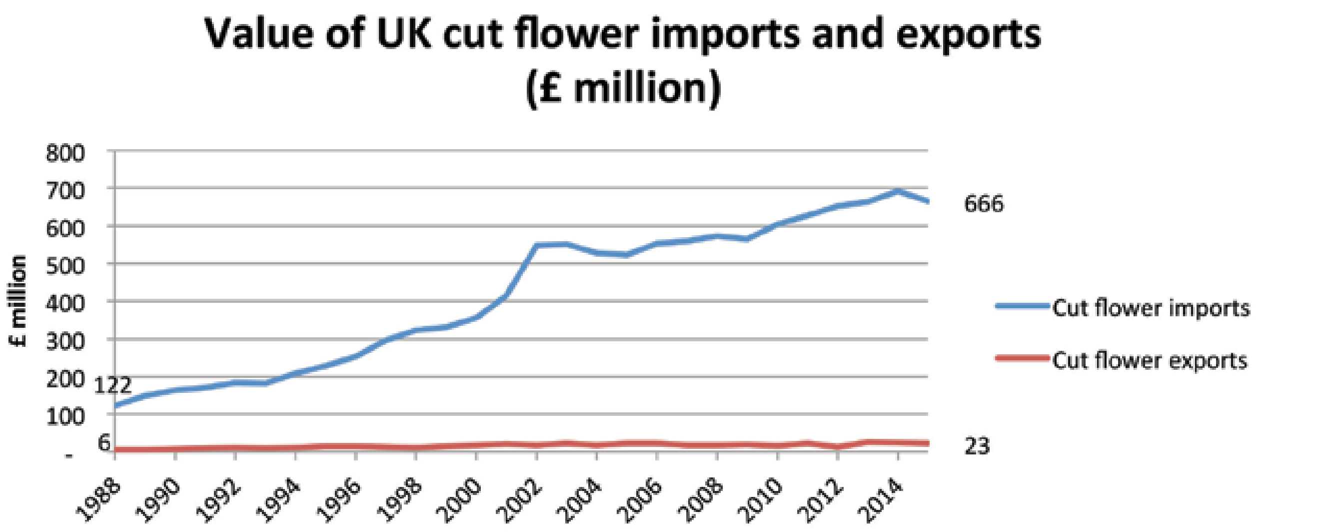


Figure 6



As such, in order to determine the value of cut flowers grown under protection any later than 2004, we must do some significant extrapolation.

Assuming the proportion of protected cut flowers and forced flower bulbs has remained the same since 2004, the value of protected cut flowers in the UK in 2015 was £22m and the value of forced flower bulbs was £26m.

We can therefore estimate that, in 2015, **the value of cut flowers and bulbs under protection in the UK was £48m.**

Total value of cut flower production

Using the calculations for the value of cut flowers grown in the open and cut flowers grown under protection, we can estimate that **the 2015 value of UK cut flower production was £82.**

This figure is calculated using a number of assumptions, so should be treated as an estimate.

The British Flower and Plants Association states that the UK cut flower and indoor plant market is worth £2.2 billion at retail level: more than that of **the UK music industry (worth around £2 billion).**

International trade – the value of cut flower imports and exports

Data on the value of imports and exports of cut flowers in the UK has been collected by HM Revenue and Customs and can be found in the Basic Horticultural Statistics between 1988 and 2013, and Agriculture in the United Kingdom.

Imports

The value of imports of cut flowers increased almost six-fold from around £122m p/a in 1988 to £666m p/a in 2015 .

The top three importers to the UK are:

1. **Netherlands (€541,293,000);**
2. **Kenya (€60,491,000); and**
3. **Colombia (€35,029,000).**

The majority of flowers imported into the UK come through the Dutch auctions.

The large Dutch auction houses operate under the umbrella of Royal FloraHolland and the individual sites that form this massive flower sales platform are world-famous, acting as a trading floor for a diverse array of flowers from around the world.

Over the years, FloraHolland has increased in size to become the largest flower auction in the world.

Quick and efficient, the sales are done in bulk and follow the principle of a Dutch auction: where a timer is set and the price is reduced until a buyer is found. For the buyers, it is a game of nerve: the first one to bid is the winner, but bid too soon and you risk paying an unnecessary premium which reduces your profits.

Flowers are bought by an assortment of traders of varying sizes who manage the exports of their purchases from the Auction to countries around the world, bidding on stems that they believe that their clients will buy at any given time of year. They import and distribute.

Exports

The value of UK exports (which includes re-exports) has quadrupled, rising from £6m p/a to around £23m, but is significantly lower than the value of imports.

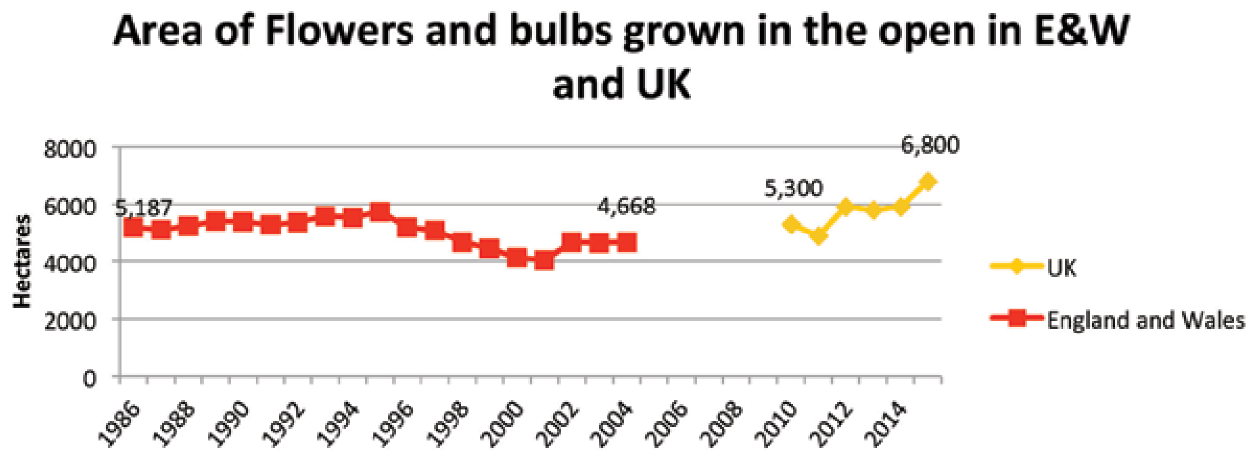
Proportion of British-grown flowers sold in UK

Around 12% of flowers sold in the UK are homegrown.

This is calculated by comparing the value of UK cut flower production (estimated at around £82m) with to the value of imports (£666m, 2015).

AREA OF BRITISH CUT FLOWER PRODUCTION

Figure 7



Flowers and bulbs in the open

The area of flowers and bulbs grown in the open was collected from 1986 to 2004 in the Basic Horticultural Statistics. Subsequent collection on a UK level is reported in the Farming Statistics (Final crop areas, yields, livestock populations and agricultural workforce) which was documented from 2010-2015. As such, there is a gap in any data between 2004 and 2010 (Figure 7).

The total area of flowers and bulbs grown in the open in England and Wales has remained relatively stable, fluctuating between 5,187ha in 1986 to 4,668ha in 2004. However, in recent years, the UK has seen an increase in the area of outdoor flowers and bulbs to 6,800ha.

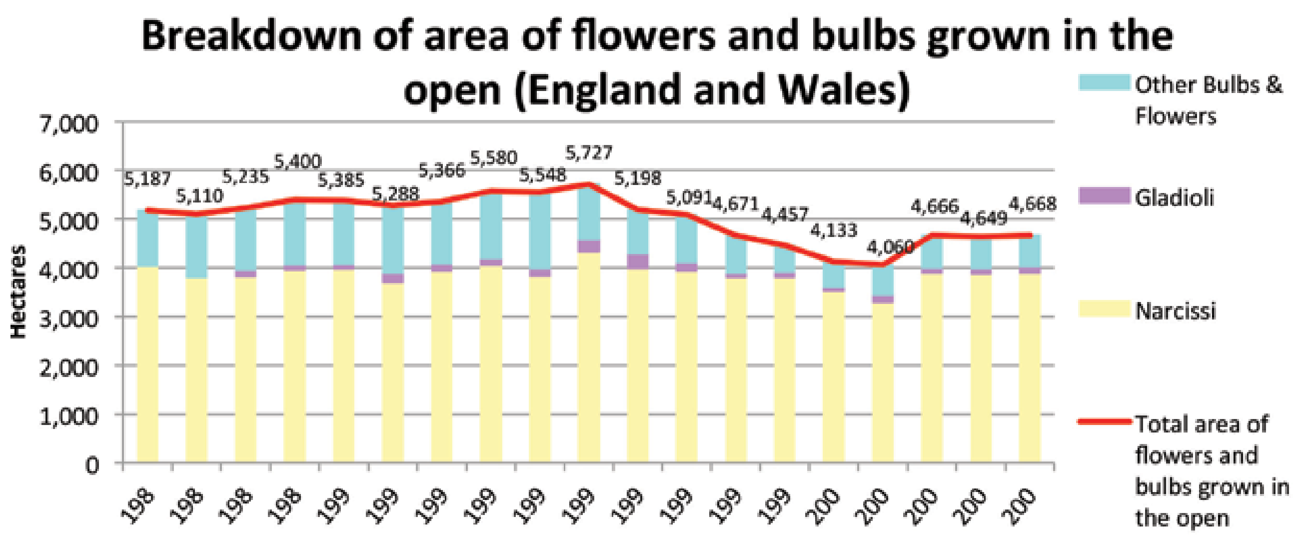
As with the data for value, the Basic Horticultural Statistics data is also split into subcategories:

1. **Narcissi**
2. **Other bulbs and flowers; and**
3. **Gladioli (a new category that was recorded separately from 1988 to 2004).**

Narcissi account for around 80% of the area of outdoor grown flowers and bulbs, with other bulbs and flowers taking the next highest category, and gladioli occupying the smallest area (Figure 8).

In recent years, the cut flower industry benefitted from high demand, and good crop quality with low wastage. Overall the production areas of outdoor cut flowers have remained relatively stable with increased plantings of peony and hardy foliage offsetting a reduction in more traditional lines such as chrysanthemum, pinks and sweet william .

Figure 8

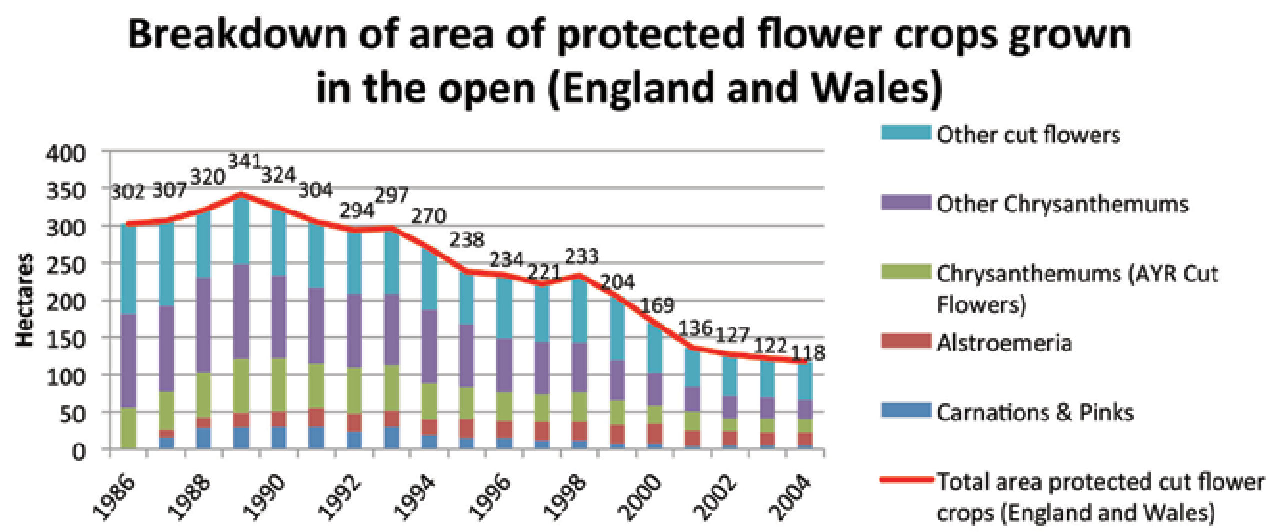


Protected crops

The area of protected cut flower crops was collected from 1986 to 2004 in the Basic Horticultural Statistics. Subsequent collection of protected crop areas has been made on a UK level and is reported in the Farming Statistics (Final crop areas, yields, livestock populations and agricultural workforce). However, they do not retain the cut flower category breakdowns which are absorbed into the total area of flowers, foliage and other plants. As such, the only data on protected cut flower area is from 1986 – 2004.

The area of protected cut flower production in England and Wales decreased from 302ha in 1986 to 118ha in 2004 (a reduction of 60% in 18 years).

Figure 9



Total cut flower production area

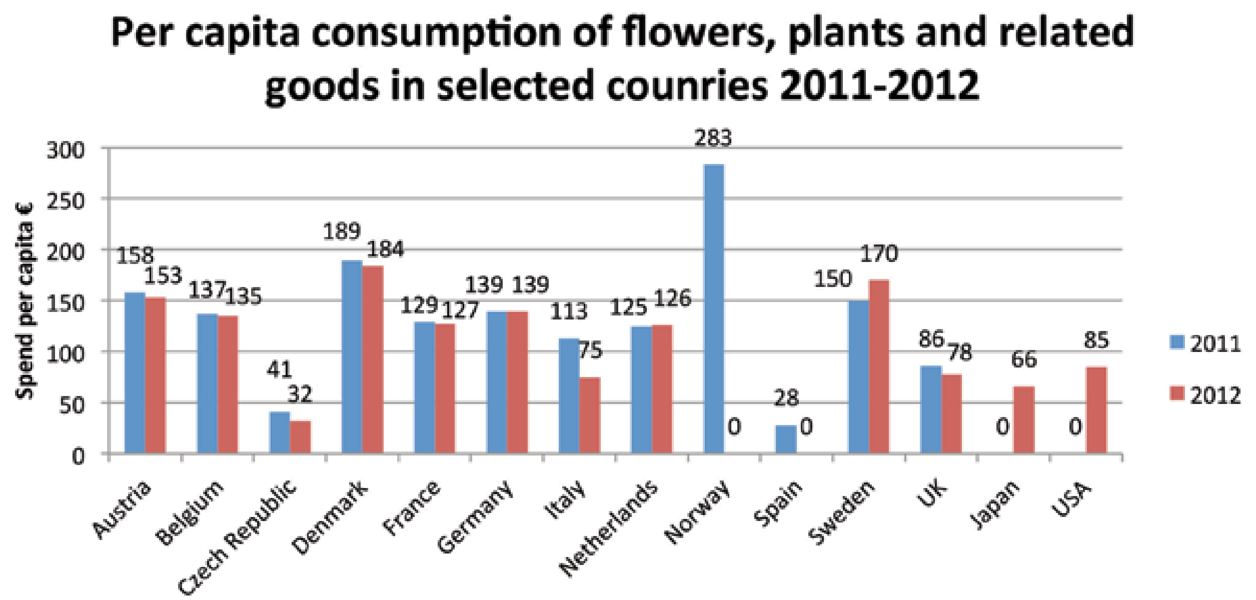
Without data on area of protected cut flower production post-2004, we cannot put an accurate figure on the total current area of cut flower production.

In 2004, the area of cut flower production in England and Wales was 4,786ha.

However, in 2015, the UK area of flower and bulbs grown in the open alone accounted for 6,800ha.

If the area of protected cut flower production in the UK is assumed to equal that of England and Wales and if the area has remained constant since 2004 (118ha), **the total area of cut flower production in the UK in 2015 would be 6,918ha.**

PER CAPITA CONSUMPTION



Based on the figures in the 62nd volume of the International Statistics Flowers and Plants (2014), in 2011, the UK had the 3rd lowest per capita consumption of flowers, plants and garden goods in Western Europe at around €86 per annum, with Norway having the highest per capita consumption at €283 per annum.

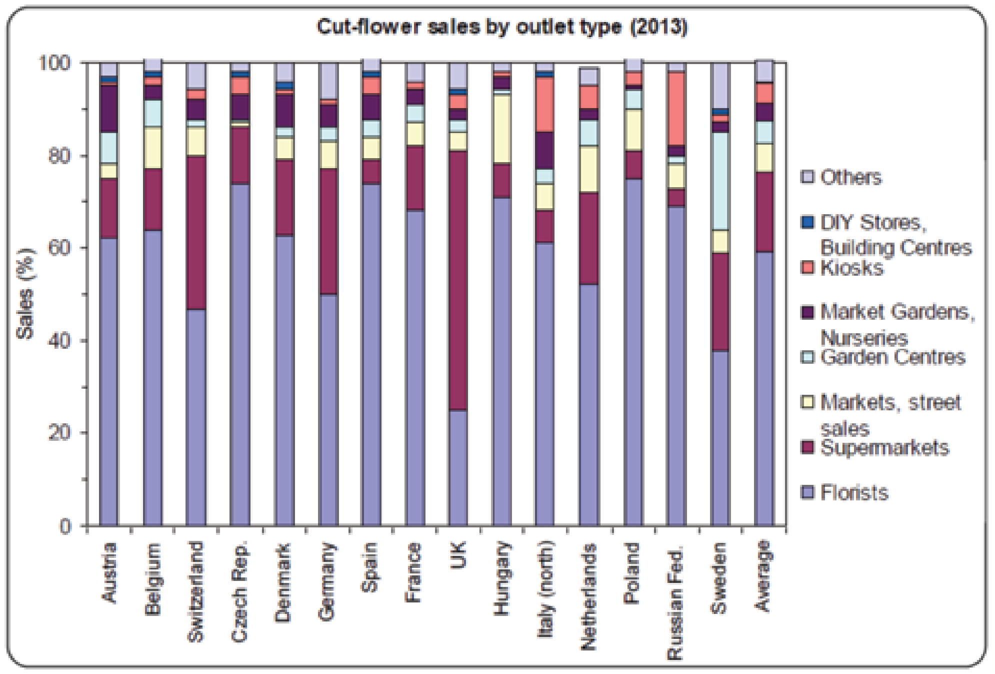
SALES BY OUTLET TYPE

The International Statistics Flowers and Plants (2014) breaks down the cut flower sales by outlet type across selected countries where data is available. These outlets include:

- **Florists**
- **Supermarkets**
- **Markets, street sales**
- **Garden centres**
- **Market gardens, nurseries**
- **Kiosks**
- **DIY stores**
- **Others**

The UK is unusual in Western Europe in that the majority of sales of cut flowers (56%) are via the supermarkets, with florists contributing around 25% of the sales. This is a marked reversal from the trend in other Western European states where, on average, florists account for the majority of sales and supermarkets contribute around a fifth.

Figure 10



SUPERMARKETS

Supermarkets are the principal outlet of cut flowers in the UK (56% sales).

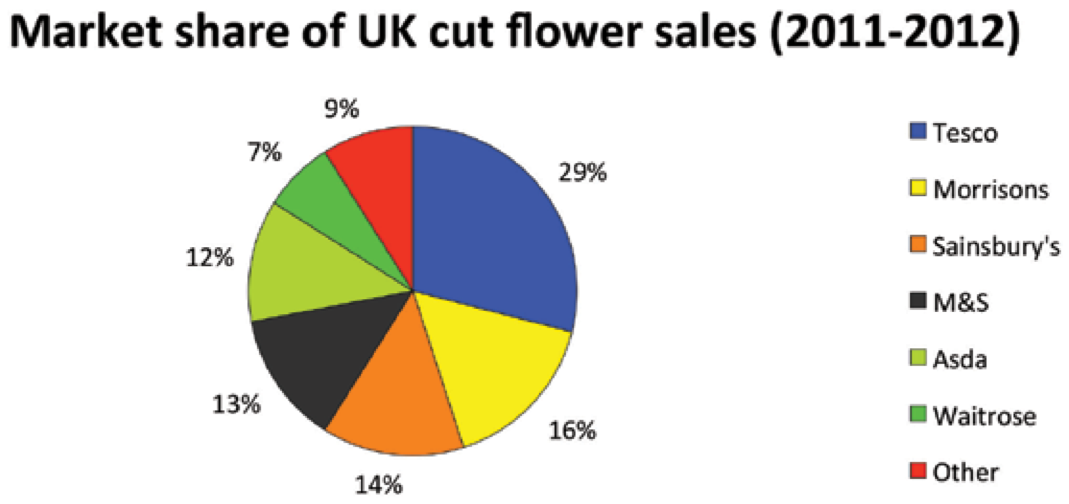
Kantar has conducted research that details key breakdowns in the cut flower multiple retail market, such as the market share of the major retailers and flower share by type.

This data is limited to collections from March 2011-March 2012.

The total cut flower retail market was worth £874m in 2011, a growth of 2.4% on the previous year.

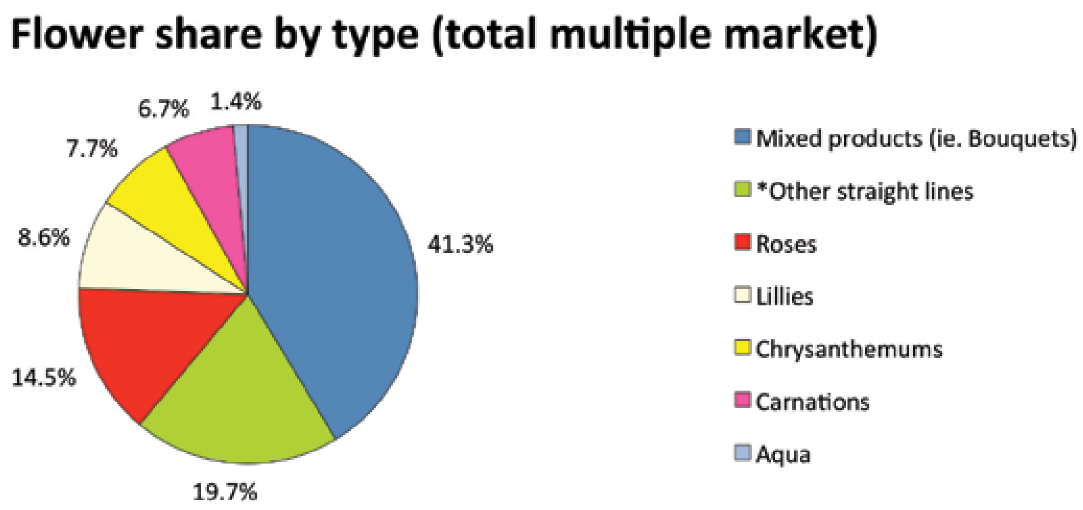
The market share of the major retailers in the cut flower sector is outlined in Figure 11.

Figure 11



The proportions of all flower types sold (including non-British) within the total multiples market are outlined in Figure 12.

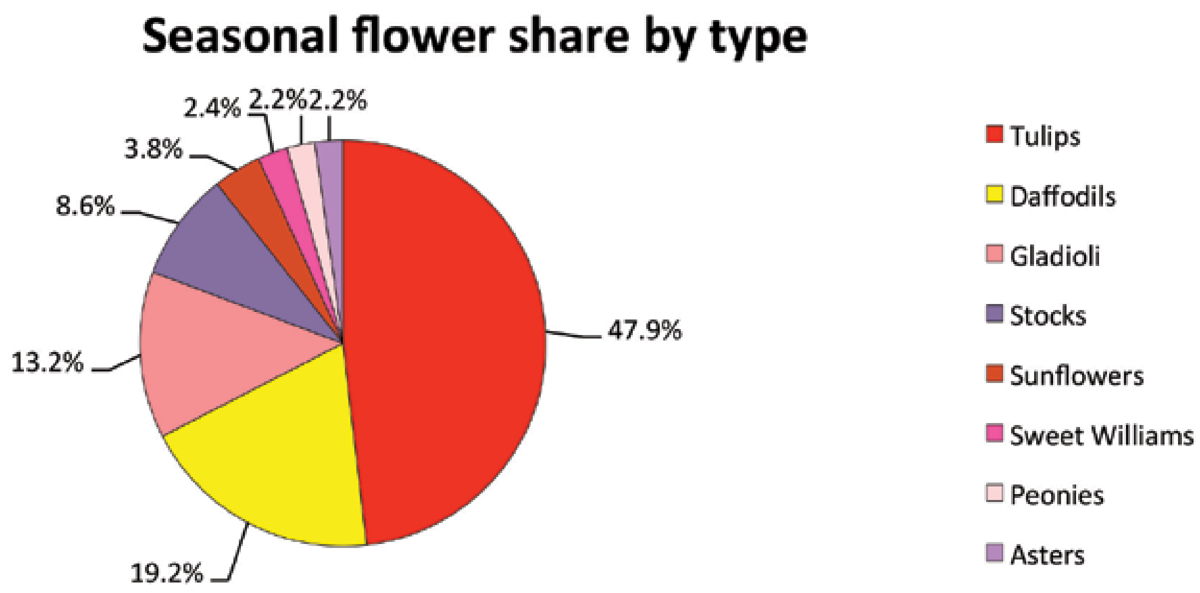
Figure 12



*The term "Other straight lines" means lines of flowers that only contain one flower type (e.g. bunches of tulips etc.)

When it comes to the breakdown of seasonal flower shares by type, work has also been done to determine this (Figure 13).

Figure 13



In the multiple retail market, there is significant evidence of that gifting remains an area of solid growth at peaks time of year (e.g. Valentine's Day, Mothers' Day and Christmas). Clear sales spikes are seen during these weeks.

This raises the prospect of potential for the sector to develop further demand for cut flowers at currently un-marketed times of the year, such as Easter or Halloween.

Floristry and British Flowers

Floristry is a competitive and growing industry that employs more than 25,000 people across the UK. There are over 8400 independent businesses and 42% of people working in the industry are self-employed.

Together, they sell around £390m cut flowers, retail value. As the second largest outlet of cut flowers in the UK (approximately 25% of the market), the floristry profession is in a significant position to influence trends in the cut flower market.

The bulk of flowers found in most British florists come through the large Dutch auction houses, and many florists use a 'Flying Dutchman' or ePlatform (e.g. FloriSmart) to source their flowers. Their popularity is thanks to their direct delivery system that can see the flowers from the Dutch market in UK flower shops by the next day (at its quickest).

Florists also have the option of buying from British flower markets around the country, such as New Covent Garden Flower Market.

New Covent Garden Flower market is the largest in the UK. They source flowers from around the world, again often via the Dutch auctions, but they also have dedicated British suppliers that provide the market with British grown stems.

Florists can ask the wholesalers to source specific flowers based on what they want any given week and can even have them delivered. However, many florists argue that one of the benefits of buying flowers through the market is the joy of browsing the products, providing them with the opportunity to see which flowers are at their peak or new in and adjust their preferences accordingly.

In a business arena that is now overwhelmed with consistency year round (if you want a red rose in the depths of a British winter, this can be done), some designers are stepping away from what has now become mainstream and are reviving the aesthetic and heady scent of seasonality. Indeed, some florists have made 'British' their trademark, using seasonal flowers to broaden their repertoire. And this trend has increased in popularity in recent years.

Florists wanting to source British flowers usually have to make use of British flower markets, or indeed grow their own. This is because the logistics and transport for British flowers does not compare to the door-to-door service of the white van network and the Flying Dutchmen. However, this is not for lack of trying.

FloraBritain

Last year, a group of 15 large scale flower farmers from Lincolnshire and Norfolk collaborated to create a company designed to take their flowers direct to the florist's door: FloraBritain. Collectively, they produce £200m worth of flowers a year (retail value), 99% of which goes direct to the supermarkets, but were keen to tackle a different market and bring their flowers direct to the florists around the country.

In order to improve efficiencies, they set up a central packhouse at one of the growers' farms to act as a hub from which their flowers were transported. Indeed, an issue with getting British flowers from farm to British florist is that the transport costs are often prohibitive given the size of orders and the frequency at which they are required, given the perishable nature of the product. However, by choosing to sell their flowers through FloriSmart - an established online shop originally designed to act as a hub for Dutch imports- they were able to cut down on transport costs by operating out of a central hub.

The benefit of choosing to sell through FloriSmart was that it connects florists to the white van network which has keys to over 2,000 florist shops and leaves the flowers in the shop in the early hours ready for the store to open. Not only that, but from FloraBritain's perspective, there were only 4 hubs to which transport from the central packhouse was required. As a result, florists could choose all their flowers in one place.

Furthermore, British flowers were cheaper than Dutch, given the reduced transport.

However, within the first year, FloraBritain started to notice problems, particularly with the courier system (a lack of chilled units, late deliveries and rough handling) which meant that their flowers were getting to the FloriSmart wholesalers late and not in top condition. As a result, they have decided to press pause on their operations, address the issues before continuing to a wider rollout, thereby ensuring that only quality British product reaches the florist.

Floristry Schools

Courses in floristry come in all shapes and sizes, from full college-based accreditations to one-day specialised events.

Floristry schools are in a powerful position to shape the interests of the florists of the future and have the potential to be a strong force for promoting British flowers. If florists are trained in the use of imported flowers alone, it limits the course participant's perception of the types of flower that are available throughout the year and ultimately, impacts their choices going forwards.

It has been argued that examining bodies need to better recognise the importance of the commercial value of British-grown flowers and include them within their courses. This is essential if we are to ensure that the knowledge needed to arrange British cut flower varieties is not lost.

There is also a notable lack of floriculture courses at land based colleges. It we are to retain the skill of commercial flower growing, then agricultural, horticultural, floristry and educational professionals need to ensure an adequate provision of training for the next generation.

RESEARCH AND DEVELOPMENT

Cut flower research is primarily conducted by the National Cut Flower Centre: a project funded by AHDB Horticulture (formerly the Horticultural Development Company – HDC) for the benefit of the UK cut flower industry. The centre's strategic direction is driven by a Management Group made up of key individuals who represent the whole cross section from grower through to supermarkets.

The facilities consist of about 600 sq.m of outdoor plots, a 7.9m x 38.1m single span Haygrove Spanish tunnel and a 22.7 x 38.1m triple span Pro Tech Spanish tunnel.

The centre conducts trials on different flower and foliage varieties and growing techniques.

The immediate aim of the programme was, and remains, to provide information on the production of a wider range of cut-flowers outdoors or (taking advantage of the increased availability of low-cost Spanish tunnels) under protection. The longer-term aim is to stimulate UK grower interest in developing and commercialising novel cut flowers and continuing to improve the quality of the more traditional products (here referred to as 'crop introduction' and 'crop improvement').

Results are published in an annual review available on the Cut Flower Centre website .

PROMOTION OF BRITISH CUT FLOWERS

The British cut flower industry does not benefit from having an overarching grower association that covers all types (and scales) of flower production. As such, the virtues of British cut flowers are not promoted to the wider consumer market, be that retailer, florist, or indeed the ultimate end user: the general public.

However, there are some very active initiatives in this area.

Flowers from the Farm

Flowers from the Farm is a membership organisation for artisan flower farmers set up by Gill Hodgson in 2011 with the simple aim of promoting British flowers and to encourage more people to start growing them for market.

With over 260 members from central Scotland to the Isles of Scilly, Flowers from the Farm has joined together growers to share knowledge, advice and flowers and showcase their glorious blooms all over the country.

Their community is very vocal and they are strong users of social media, using hashtags #grownnotflown and #Britishflowers to great effect, raising the profile of British flowers to an international audience.

BRITISH FLOWERS WEEK

British Flowers Week is the brainchild of the team at New Covent Garden Flower Market, the UK's largest Flower Market.

This promotional week started in 2013 as a social media campaign for the floristry trade. However, #BritishFlowersWeek was quickly picked up by florists, growers, wholesalers and media the length and breadth of Britain and became a national celebration of seasonal, locally-grown flowers that is uniting the UK cut flower industry and inspiring the public to think about where their flowers come from.

Last year, the hashtag #BritishFlowersWeek achieved a staggering Twitter reach of 5.7million people with British flowers content posted online, on social media, in print and on the radio. There were 2200 posts on Instagram and posts on Facebook - including by Waitrose, GQ Magazine, The Ritz and even No 10 Downing Street.

Throughout the week, the nation's growers, wholesalers and florists enthusiastically spread the word about British flowers. Flower farmers threw open their gates for tours, talks and demonstrations and took British flowers into schools, an RHS Garden, stately homes and into city centres. Super-creative florists designed exclusive British Flowers Week bouquets, dressed window-displays, held workshops and staged British flowers photoshoots.

This initiative has been a huge success, and with NFU involvement is being rolled out in 2016 to include flower grower profiles for the first time. However, they recognise the limitations of a week-long promotion and the need for a stand-alone promotional body to deliver British cut flower marketing year-round.

Many, including leading figures in retail, floristry and production, see the benefit of setting up a grower association to help with the promotional aspects that would benefit British flower production, but also assist with collecting market data which helps inform and direct policy-makers.

Helping the British cut flower industry reach its full potential

Over the last 30 years, the British cut flower sector has faced difficult times. It has failed to keep up with the increase in the cut flower consumption of British households which has been met by the booming Dutch import market. But this market is starting to suffer as the subsidies that propelled it to success are being phased out.

Now, the British cut flower industry is at a crossroads. It faces new opportunities for growth as rising prices at the Dutch auctions, coupled with a surge in consumer awareness and demand for seasonal flowers, make it increasingly competitive and desirable.

The time to take back some of the market has never been better.

Through the researching of this report, a number of barriers to growth have been uncovered. In order for the British cut flower sector to reach its full potential, these must be tackled and resolved.

In conclusion, the following points highlight the key areas that we believe need to be tackled to remove the barriers to growth for this budding sector and secure the revival of the British cut flower industry.

- **Development of a British Cut Flower Grower Association.** This should be inclusive of all cut flower growers (irrespective of size) to represent their sector, undertake promotional campaigns, work with the cut flower supply chain to develop demand-based strategies for growth and collect market data to help inform policy-makers, retailers and consumers.
- **Improvement of provenance labelling of cut flowers in retailers and florists.** Inclusion of provenance on cut flowers would help upskill the consumer on where their flowers come from and enable them to make informed choices.
- **Commitment to fair trading practices.** Relationships with growers of flowers sent into retail should be compliant with the principles of GSCOP, working with UK growers to strengthen closeness to markets and source fresher products.
- **Access to a range of effective plant protection products.** Cut flower growers need access to a variety of products for integrated pest management to minimise resistance. To be competitive, British growers also need a fully harmonised approach to plant protection across the EU so they can access products that growers in other Member States can use.
- **Fair mitigation measures to soften the impact of the National Living Wage.** The cut flower sector is highly labour intensive with little opportunity to offset costs. Appropriate measures for horticultural growers will help relieve the immediate burden of the National Living Wage and allow growers time to adapt.
- **Exam bodies to better engage with British flowers.** Certified floristry courses should be inclusive of British grown flowers: incorporating them into their courses to educate their students and broaden the horizon of the next generation of florists.
- **Land based colleges to introduce a floriculture module.** A lack of availability of floriculture modules in horticultural education will result in the loss of this knowledge for future generations.
- **For Government to further support, fund and facilitate further cut flower research and development.** Work undertaken by the Cut Flower Centre is producing important results for the industry. Further support will enable British floriculture to move forwards and grow through innovation.
- **Grants for cut flower producers. Investment in structures such as glasshouses is expensive.** Many growers would benefit from funds to help them invest in climate-control structures to increase productivity.
- **Development of a financially viable British flowers transport system.** In order for British growers to be competitive with the Dutch import market, cost-efficient transport between British farms and British florists needs to be available.
- **Inclusion in the Ornamental Horticulture Roundtable.** Whilst currently not excluded, the Ornamentals Roundtable needs to remember to incorporate British cut flowers into their work.
- **Availability of land for flower growing.** This is a particular problem for small-scale growers who only need small parcels of land to meet their needs.

BACKING BRITISH BLOOMS

THE STATE OF THE BRITISH CUT FLOWER INDUSTRY

National Farmers' Union
Agriculture House
Stoneleigh Park
Warwickshire
CV8 2TZ

02476 858500

horticulture@nfu.org.uk

www.nfuonline.com