Perspectives from the international cut flower supply-chain

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Key characteristics of the cut flower supply-chain:

• Global markets functioning along very dynamic flows and with very intensive cross-border movements
• Cut flowers: highly perishable products with a short life-cycle
• Wide assortment: a large number of flower varieties & species are being traded all over the world, depending on the season and trends
• Peak seasons: Valentine’s day, Mothers’ day
  o Huge volumes must reach destination markets on time
  o Extreme pressure on the supply-chain and logistics during a few days of the year
• Efficient logistics and processes are essential along the supply-chain, from origin to destination, to ensure on-time deliveries
Requirements to access destination markets are becoming more and more stringent:
Existing and emerging plant health issues put pressure on official plant health systems:

• Increased pressure on origin/exporting countries to tackle plant health issues at the earliest stage and before export

• Increased pressure on importing / destination countries to clear shipments to enter the market

• Limited resources and need for a targeted and optimized use of control capacity
TOP 5 Flower exporting countries:

- Netherlands
- Colombia
- Ecuador
- Kenya
- Ethiopia

5 countries = 80% of all exports

Heavy pressure on phytosanitary certification systems at a few key export points for large volumes & number of shipments

Sources: UN-Comtrade, Royal FloraHolland, Rabobank
CHALLENGES

• TOP 5 Flower importing countries:

- Germany
- UK
- USA
- Netherlands
- Russia

5 countries = 60% of all imports

Heavy pressure on phytosanitary control systems at a few key import points for large volumes & number of shipments

Sources: Eurostat, national statistics, ITC
CHALLENGES

Non-compliant documents trigger a higher number of import rejections than actual plant health issues (harmful organisms)

Overview of EUROPHYT interceptions of cut flowers and foliage notified in 2011-2015:

- 2011: 236 harmful organisms, 218 non-compliant documents
- 2012: 392 harmful organisms, 245 non-compliant documents
- 2013: 501 harmful organisms, 183 non-compliant documents
- 2014: 271 harmful organisms, 118 non-compliant documents
- 2015: 180 harmful organisms, 180 non-compliant documents

Source: EUROPHYT & Union Fleurs databases
RESPECTING PLANT HEALTH RULES IS VITAL FOR PRIVATE OPERATORS:

Appropriate plant health rules and levels of controls must be enforced, at origin and at import into destination markets, to ensure adequate protection against pest outbreaks.

SAFE TRADE is an essential prerequisite for

A SUSTAINABLE FLOWER SUPPLY-CHAIN
LESSONS LEARNED

• Responsible and duly diligent supply-chains are essential to safeguard plant health and help tackle threats & emerging issues:

  ✓ Ensure appropriate **anticipation, prevention and management** of plant health issues at the earliest stage and along the whole supply chain

  ✓ Fully integrate plant health in **risk-management strategy**:  
    • to limit costs of rejections at borders of destination markets  
    • to optimize compliance costs  
    • to ensure a stable access to export markets in the long-term and secure sustainable market growth
LESSONS LEARNED

• The efficient management of plant health issues at origin is evaluated and rewarded by destination markets at country-level, not at the level of individual operators.

• A collective effort across supply-chains is required to maximise efficiency, actively involving NPPOs at origin & at destination, operators and industry bodies.
RECOMMENDATIONS

Striking the right balance between plant health imperatives to protect ecosystems and operational needs of supply-chains:

• No trade-offs on plant health but fast and efficient procedures are necessary due to high perishability of floricultural products:
  ✓ Streamline processes and remove duplications along the supply-chain
  ✓ Shift to paperless systems (ePhyto) to optimize processes and protect legitimate trade
  ✓ Regularly review and update requirements
RECOMMENDATIONS

• Focus on *prevention strategies & capacity-building* to tackle plant health issues at the earliest possible stage and avoid devastating outbreaks.

• Enforce *risk-based and proportionate plant health measures* at critical points along the supply-chain to target control capacity on actual issues and ensure level-playing field conditions for operators.

• *No ‘one – size – fits- all’ approach*: take account of product specificities, regional ecosystems and operational needs of each supply-chain.
• Favour a **pragmatic & collaborative approach** to tackle existing and emerging plant health issues:
  
  ✓ Promote a constant **dialogue between NPPOs and other border agencies** to align procedures and documentation requirements as much as possible and facilitate paperless trade.

  ✓ Provide efficient **toolbox to manage plant health issues** and appropriate regulatory frameworks to use these tools (e.g. IPM)

  ✓ **Industry and NPPOs should keep challenging each other** in a productive manner: coordinated management of plant health risks via inclusive processes, partnership and trust-building exercises.
The flowers provide nectar whereas the bees help in pollination. A beautiful example of symbiosis or teamwork in nature.
Thanks for your attention!

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