Market evolution: Live plants and bulbs (CN 06) — 2015–2025

Introduction

Between 2015 and 2025, extra-EU trade in live plants, bulbs, cut flowers and ornamental foliage (CN 06) expanded markedly in value, yet volume movements tell a very different story. Total EU exports rose from €3.34 billion to €4.64 billion (+39 %), while imports grew from €1.59 billion to €2.21 billion (+39 %). The trade surplus – already sizeable – widened from €1.75 billion to €2.43 billion. This report analyses the main dynamics behind the headline numbers, highlighting the interplay of price inflation, shifting partner geographies and supply-chain shocks.

Trade flow	2015 (€ bn)	2025 (€ bn)	Change
Exports	3.34	4.64	+39.0 %
Imports	1.59	2.21	+39.3 %
Balance	1.75	2.43	+38.7 %

Source: Trade overview

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1. Inflation-Fuelled Growth Widens the Trade Surplus Despite Stagnant Volumes

Export value growth was almost entirely price-driven; tonnage barely moved

While the export value climbed by 39 %, the quantity shipped rose by only 5.6 % (from 1.16 million tonnes to 1.23 million tonnes). Consequently, the average export price surged by 31.6 %, from €2 875 to €3 785 per tonne. This indicates that higher unit values, rather than larger physical flows, generated the additional export revenue.

Import volume shrank, but soaring unit prices still pushed the import bill higher

The import side shows even stronger disconnection between volume and value. Import quantity fell by 14.4 % (from 503 503 tonnes to 431 090 tonnes), yet import value rose 39.3 %. The average import price jumped by 62.8 %, from €3 154 to €5 134 per tonne.

Thus, the EU paid substantially more for a smaller physical inflow, a pattern that reflects global supply constraints and logistics cost inflation in horticultural trade.

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2. Geopolitical Realignment and Diversification Reshape Trading Relationships

The United Kingdom remains the top export destination, but new growth comes from the United States and Türkiye

The UK preserved its position as the largest external market, with exports rising from €1.26 billion to €1.61 billion (+28 %). Switzerland, the second-most important buyer, also expanded steadily (+34 %). However, exports to the Russian Federation contracted by 20 %, while deliveries to the United States surged by 50 % (to €331 million) and to Türkiye by 31 %. Belarus recorded a 78 % increase but with extreme year-to-year swings.

Top export partners

Partner (exports)	2015 (€ m)	2025 (€ m)	Change
United Kingdom	1 262	1 612	+27.7 %
Switzerland	448	601	+34.2 %
United States	220	331	+50.2 %
Russian Federation	411	329	–19.9 %
Türkiye	59	77	+31.2 %

Export market concentration, measured by the Herfindahl-Hirschman Index (HHI), fell from 1 868 to 1 550 (–17 %), confirming a broader diversification of buyers.

Import sourcing shifts from traditional European suppliers to Latin America and Asia

Kenya stayed the leading supplier (€513 million, +32 %), but the most striking expansions came from Ecuador (+129 % to €423 million) and Colombia (+133 % to €229 million). Imports from China grew by 68 %, while Costa Rica and the United Kingdom lost ground (–26 % and –27 % respectively). The import partner HHI edged up by 12.8 %, signalling a slight reconcentration toward a few large horticultural exporters.

Top import partners

Partner (imports)	2015 (€ m)	2025 (€ m)	Change
Kenya	389	513	+31.9 %
Ecuador	185	423	+128.5 %
Colombia	98	229	+133.4 %
China	49	83	+68.1 %
Costa Rica	64	48	–26.2 %

The Netherlands dominates both export and import flows within the EU

At Member-State level, the Netherlands is the undisputed hub: its extra-EU exports rose from €2.42 billion to €3.61 billion (+49 %) and its imports from €1.17 billion to €1.72 billion (+47 %). Spain and Italy recorded strong export gains (+112 % and +57 % respectively), whereas Germany's exports declined by 16 %. Lithuania's exports collapsed from €127 million to €1.4 million (–99 %), likely reflecting the rerouting of flows that previously transited through the country. Specialisation data for 2025 confirm the Netherlands' exceptional concentration in this sector (RSCA +0.65, product share 68.4 % of EU exports in CN 06).

Top reporting countries | Specialisation scores

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3. Price Shocks and Structural Volatility Highlight Supply-Chain Vulnerabilities

Import prices spiked violently in 2022, especially for African and Latin American flowers

Several key suppliers experienced extreme price shocks in 2022. The most severe hit Uganda: the average import price jumped by 166 % compared to the 2020-2021 baseline, while volumes more than halved. Ethiopia and Costa Rica saw price increases of 86 % and 83 % respectively, with concurrent quantity drops of around 40 %. Even China, a more diversified source, recorded a transient 180 % price upswing. These synchronous disruptions point to global freight bottlenecks and input-cost inflation that hit perishable horticultural goods particularly hard.

Price shock events

Export markets also witnessed abrupt unit-value adjustments, notably in northern and eastern Europe

On the export side, the largest price shock occurred in 2018 for Norway (+77 %), while Türkiye registered an enormous relative price shift (+432 %) accompanied by a 85 % drop in quantity. The United Kingdom recorded a 133 % price jump in 2018, though quantities also fell sharply. Such large, one-off movements often reflect changes in product composition or measurement units, yet they underscore the data volatility inherent in this commodity group.

Volatility overview

Cut flowers dominate imports, while live plants lead exports; bulbs show dramatic price swings

Product-level data reveal that cut flowers (CN 0603) account for the bulk of extra-EU imports, reaching €1.49 billion in 2025 (+56 % since 2015), with import prices nearly doubling to €6 042/tonne. On the export side, live plants (CN 0602) generated €2.01 billion, followed by cut flowers (€1.48 billion) and bulbs (CN 0601, €975 million). Bulb import prices were exceptionally volatile – collapsing from €11 627/tonne in 2016 to €3 282/tonne in 2025 – hinting at shifts between high- and low-value bulb varieties. Foliage (CN 0604) plays a smaller but stable role in both flows.

Product segment comparison

Sub-chapter (imports)	2015 (€ m)	2025 (€ m)	Price change
0603 Cut flowers	953	1 487	+99 %
0602 Live plants	307	461	+13 %
0604 Foliage	217	197	+47 %
0601 Bulbs	90	69	+10 %

Sub-chapter (exports)	2015 (€ m)	2025 (€ m)	Price change
0602 Live plants	1 325	2 012	+37 %
0603 Cut flowers	1 116	1 483	+42 %
0601 Bulbs	607	975	+69 %
0604 Foliage	134	171	+9 %

Conclusion

The EU’s external trade in live plants, bulbs and cut flowers has expanded robustly in value, but the heavy imprint of price inflation and supply-side turbulence masks weaker volume performances. While the United Kingdom and Switzerland remain reliable export markets, the fastest growth is coming from the United States and Latin American suppliers. The 2022 import price shocks exposed vulnerabilities in just-in-time floral supply chains, leading to higher costs for EU buyers. The Netherlands' unparalleled logistical role ensures it continues to shape both the import and export landscape. Future monitoring should focus on price normalisation, the durability of new sourcing patterns, and the potential impact of evolving plant-health regulations on these highly perishable trade flows.

Generated on 2026-07-24 based on data from tradedashboard.eu

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