



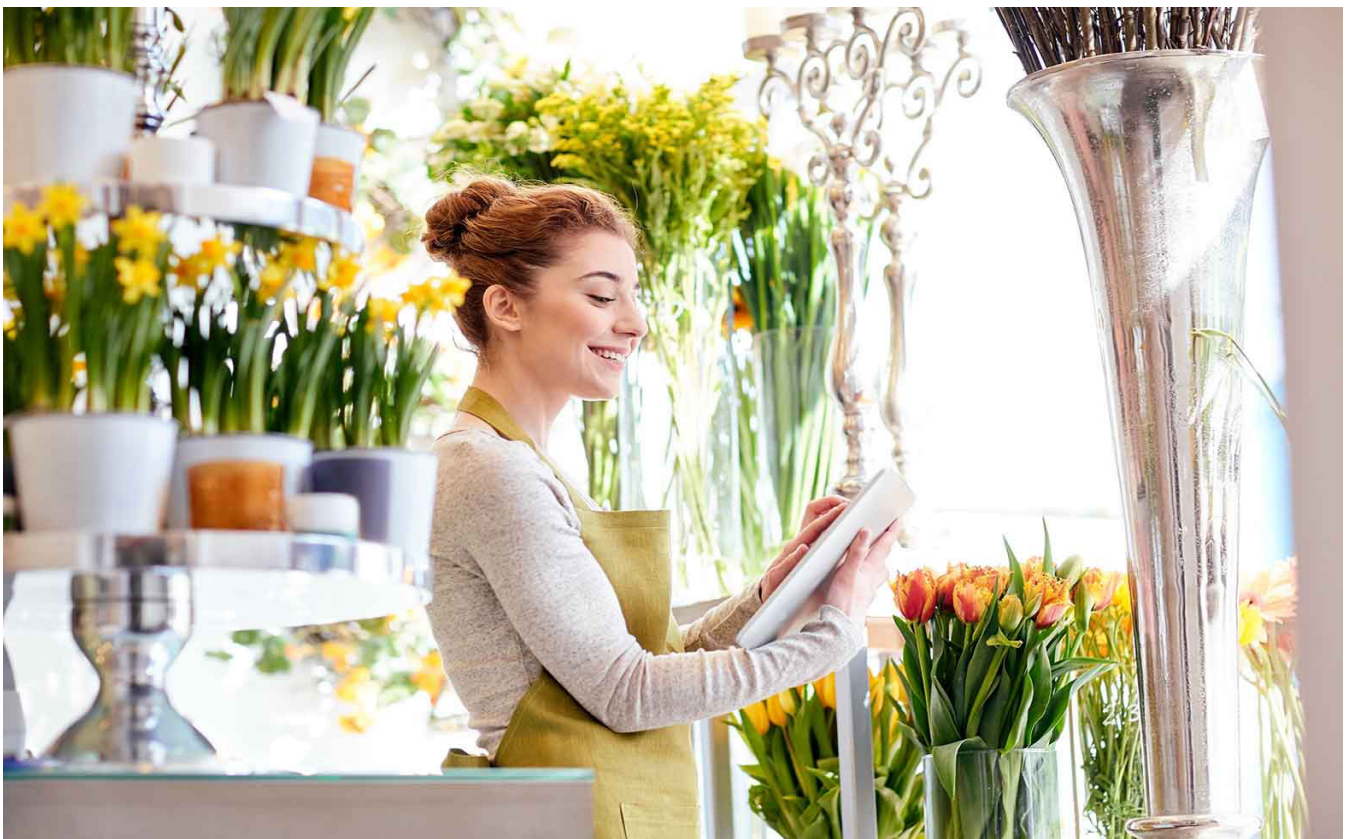
Kingdom of the Netherlands

# National Flower Survey Report conducted in Poland



Embassy of the Kingdom of the Netherlands  
in Warsaw

2020



## **Contents**

<b>Intruduction</b>	<b>3</b>
<b>About me, my flower shop/floristic activity</b>	<b>4</b>
General data	4
Idea for business	5
Employees	5
Flower deliveries	6
Polish vs foregin	6
Online platforms	8
<b>Education</b>	<b>10</b>
Training of employees	12
<b>Branch organisations</b>	<b>13</b>
<b>Sale, offer, promotion</b>	<b>14</b>
Sale of flowers	14
Sales of plants	16
Promotion and offer	16
Merchandising	17
<b>Customers</b>	<b>18</b>
Customer preferences	19
<b>Market development and future of my business</b>	<b>21</b>
<b>The future of flower business</b>	<b>25</b>
<b>SWOT</b>	<b>28</b>

## Introduction

The export figures from the Netherlands are the best indicators of the size and growth dynamics of the flower sector in Poland. Poland is on the 5th place among the importers of cut flowers and ornamental plants from that country. The first places are taken by more developed and economically stronger: Germany, The United Kingdom, France and Italy. Poland has for several years been steadily strengthening its position as a serious flower importer. The import figures have been steadily increasing in value: in 2019 showing the increase of 12%. This is the biggest jump in the top ten countries on the list.

Despite the dynamic development of the flower market, the Polish sector has not explored and measured the needs and most important problems the industry is facing.

The National Florist Survey was conducted from February 10 to March 31, 2020, in the form of an online questionnaire. The survey was directed to florists: flower shop owners and employees, and independent florists. Participation in the survey was totally anonymous and voluntary. 502 respondents from whole Poland took part in it. The survey included 69 questions: closed questions, single or multiple choice, and open questions. The latter were designed to clarify the answers of closed questions and to open a discussions on the future of Polish floristry, seen by florists themselves.

The survey was conducted with the support of partners:

## Honourable Patronage



## Patronage



## Partnership



## About me, my flower shop/floristic activity

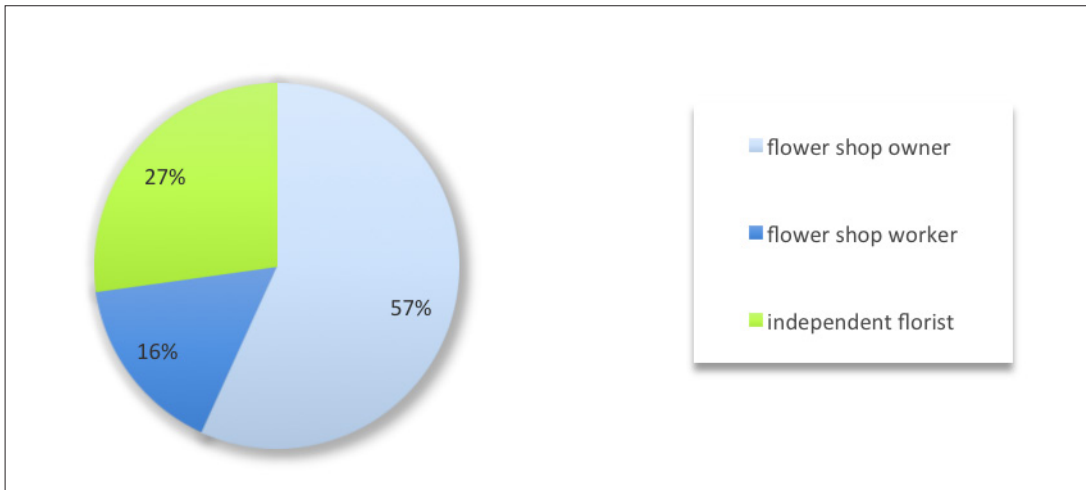


### General data

502 people took part in the survey.

Half of all respondents were flower shop owners.

The second largest group were independent florists, running their own business (around 30%) and the smallest group: flower shop employees (16%).



All groups of respondents were spread more or less equally throughout Poland. Slightly more only in Mazowieckie (Warsaw) and Silesia (with a density of medium-sized towns). This is confirmed by the next question: about the size of the city/town where they have their business.

The highest density of the floral business was recorded respectively:

- nearly 50% of respondents were in medium-sized cities of 10,000 – 500,000 inhabitants: such as Rzeszów, Toruń, Gdynia
- nearly 30% of respondents were in large urban centres of over 500,000 inhabitants each, such as: Warsaw, Poznan, and Kraków
- over 20% of respondents were from places of 500 -10 thousand inhabitants

This data confirms the intuitive knowledge that the **highest concentration and the biggest development of floral business is in the cities. Mostly there you can also find wholesale markets and importers supplying the florists.**

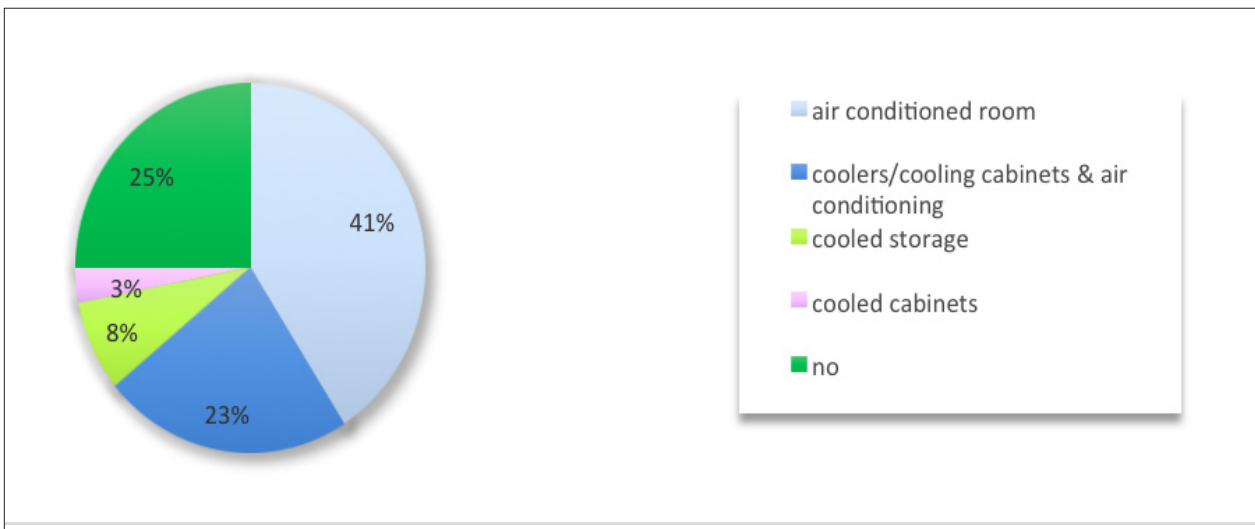
More than 2/5 of the surveyed flower shops and independent florists confirmed that their flower shop/studio is located in the city center, on a busy street. Almost 1/3 is located in a residential area. At the same time, it was noted that 1/5 of flower shops were located in shopping centers, which is quite characteristic for the developing trade. 12% declared to run floristic workshops in the villa districts.

## Idea for business

The key factor in achieving success in the floristic industry is **the passion for flowers and floral art - more than 80% of all respondents confirmed it**. Nearly 20% of respondents admitted they were continuing the family business.

At the same time, the love for flowers does not always translate into serious business investments. 2/5 of all respondents confirmed that they had air conditioned rooms, 1/5 coolers/cooling cabinets, and air conditioning, 8% - cold storage, and only 4% declared having cooled cabinets or display cases.

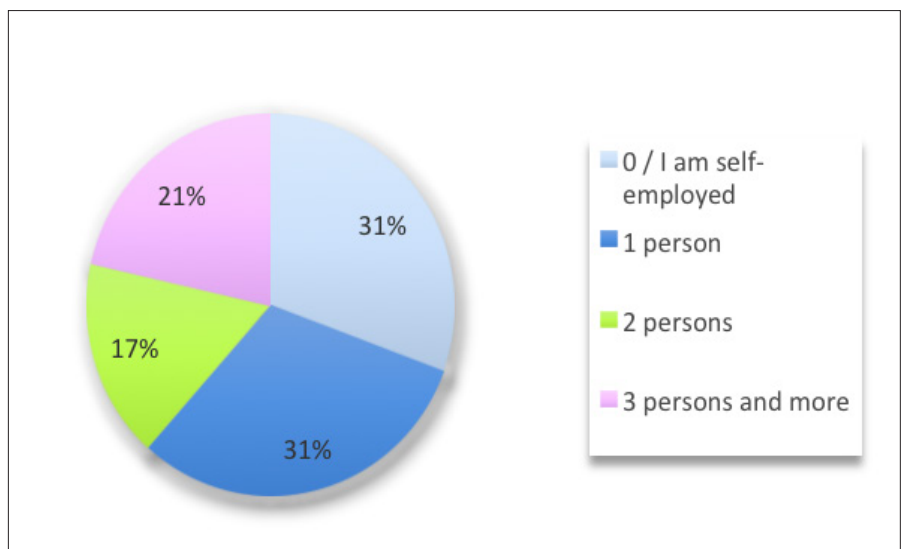
This means that as many as 1/4 of those surveyed do not have any equipment of this type.



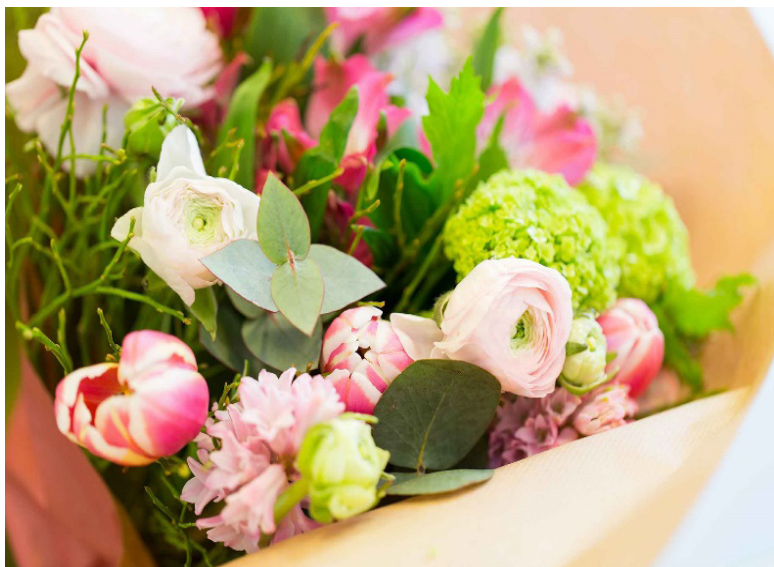
## Employees

30% of flower shop owners surveyed run the business by themselves, and exactly the same percentage employs one person. The remaining 40% are bigger flower shops, employing 3 people and more (21%), as well as 2 people (17%).

The study also showed some stable trend in the floral labor market: the vast majority (80%) of employees confirm that their employers have guaranteed them a permanent form of employment - employment contract, and that they do not plan to change the employer now.



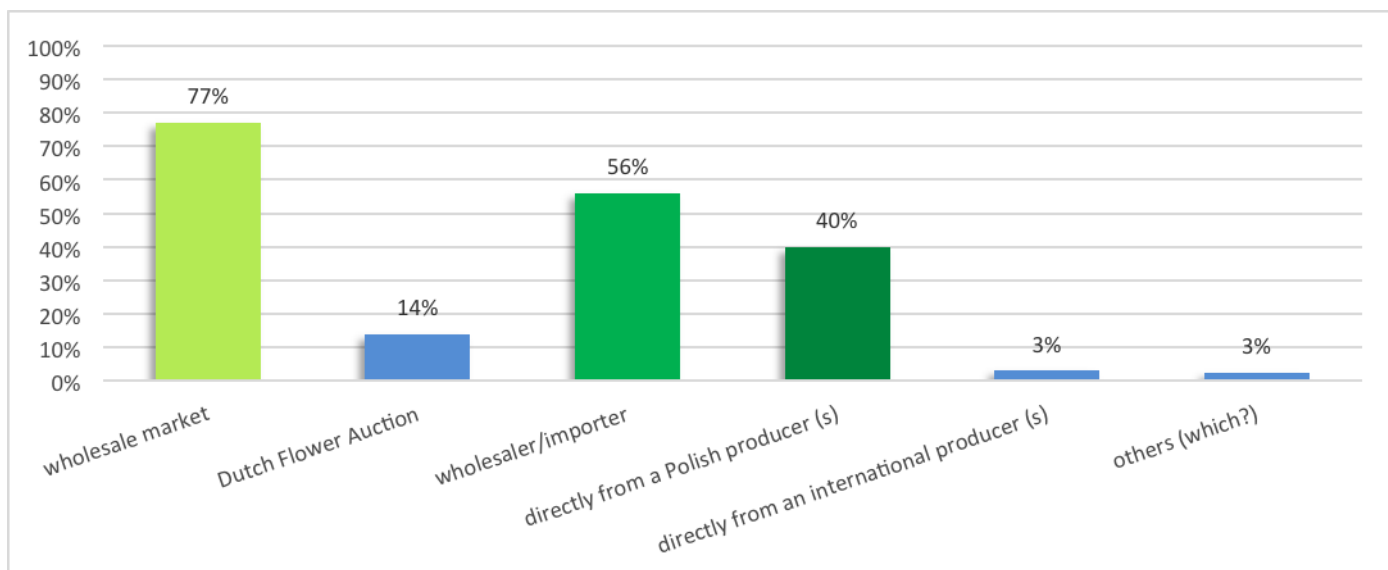
## Flower deliveries



The most important factor in conducting a floristic business that directly influences the condition and development of the entire flower sector is the availability and good orders fulfillment made by flower shops/studios. The results have confirmed the prevailing role of wholesale markets, wholesalers and Polish producers. It also pointed to a significant increase of interest in the offer of wholesalers/importers of flowers from the Netherlands.

As the additional source of supply, florists have identified wholesalers online, their own farms and even their own wholesale places.

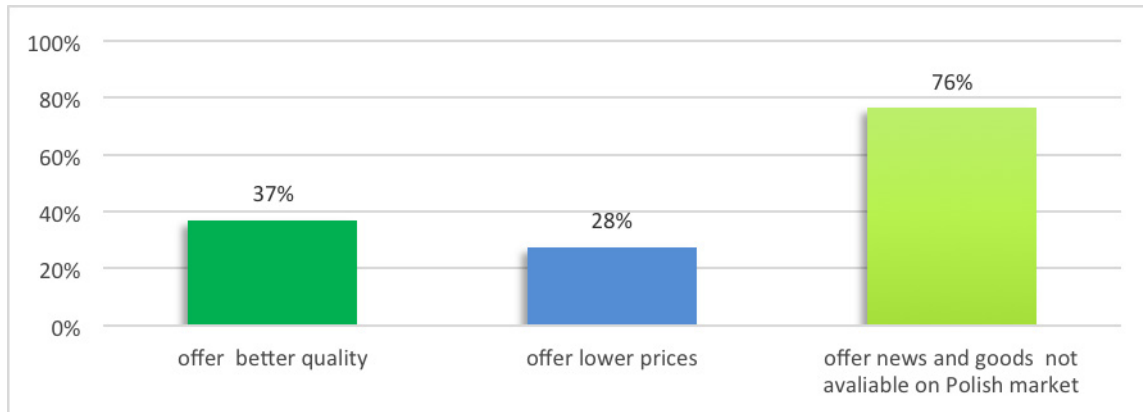
The vast majority of respondents are supplied by Polish producers, only one third of them pick the imported flowers. It is due to a desire to help and promote domestic production (almost 2/3 of the respondents), half of the respondents indicate the good quality of the flowers, the price and the absence of language barrier are of lesser importance.



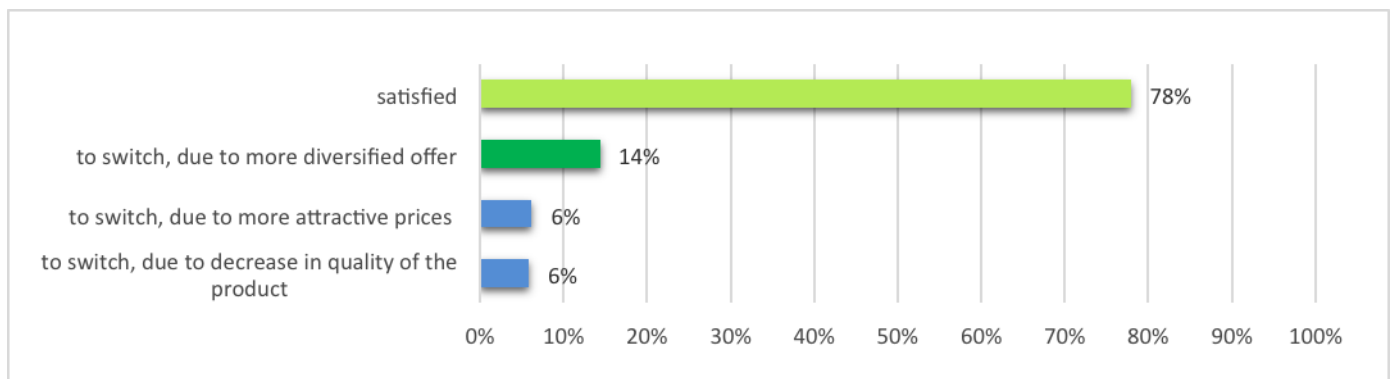
## Polish vs foreign

**Almost 80% of those surveyed value foreign producers for the big variety of flowers and plants and a wide range of novelties**, thanks to which Polish florists are able to meet the expectations of even the most demanding customers, as well as follow the trends in the flower industry. In addition, the exporters were appreciated for the high quality and attractive prices of flowers offered.

## Respondents who prefer buying from foreign suppliers



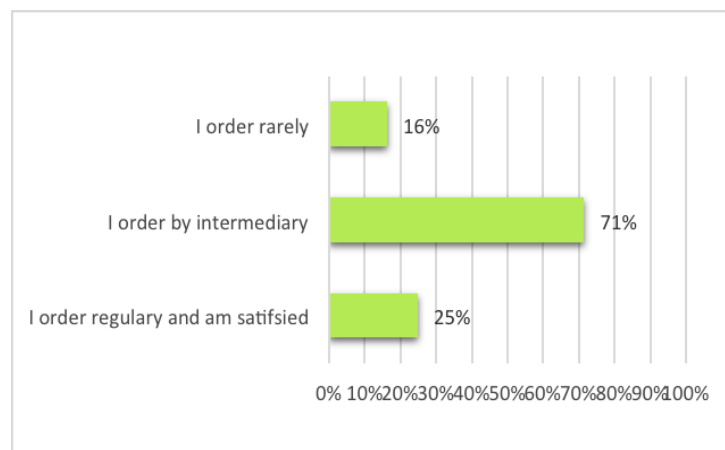
Worth highlighting is the fact that 78% of respondents confirmed that they are satisfied with their current supplier, which on one hand is a big challenge for new players who try to win new customers, but on the other hand it is good news for all those who already have an established cooperation, because it means focusing on the long-term cooperation with the florists. Rest of respondents said they planned to switch suppliers looking for more diversified offer (14%) and more attractive prices (6%).



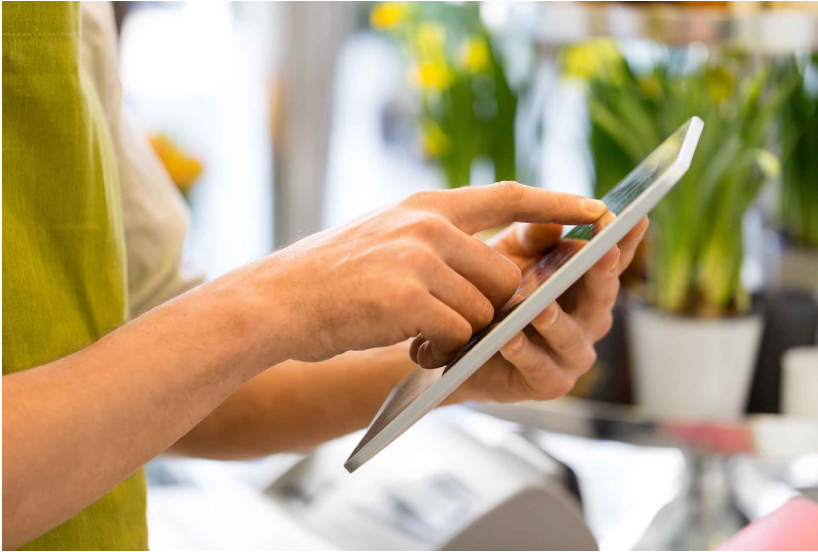
**Almost 80% of respondents admitted that they did not buy flower on the Dutch flower auction, and only 20% confirmed that they buy flowers on the auction.**

The majority of those buying on the auction admitted (71%) that, they ordered flowers through an intermediary - but only a quarter of them declared regular order fulfillment and expressed satisfaction with this form of supply- indicating that purchases are cautious and occasional.

This is partly confirmed by another question, where only 7% of respondents declare orders from the Netherlands through online platforms. On the other hand, there are importers, who also order from abroad. The figures given are not very accurate. As the next question shows, the percentage of purchases abroad is already around 30%.



## Online platforms

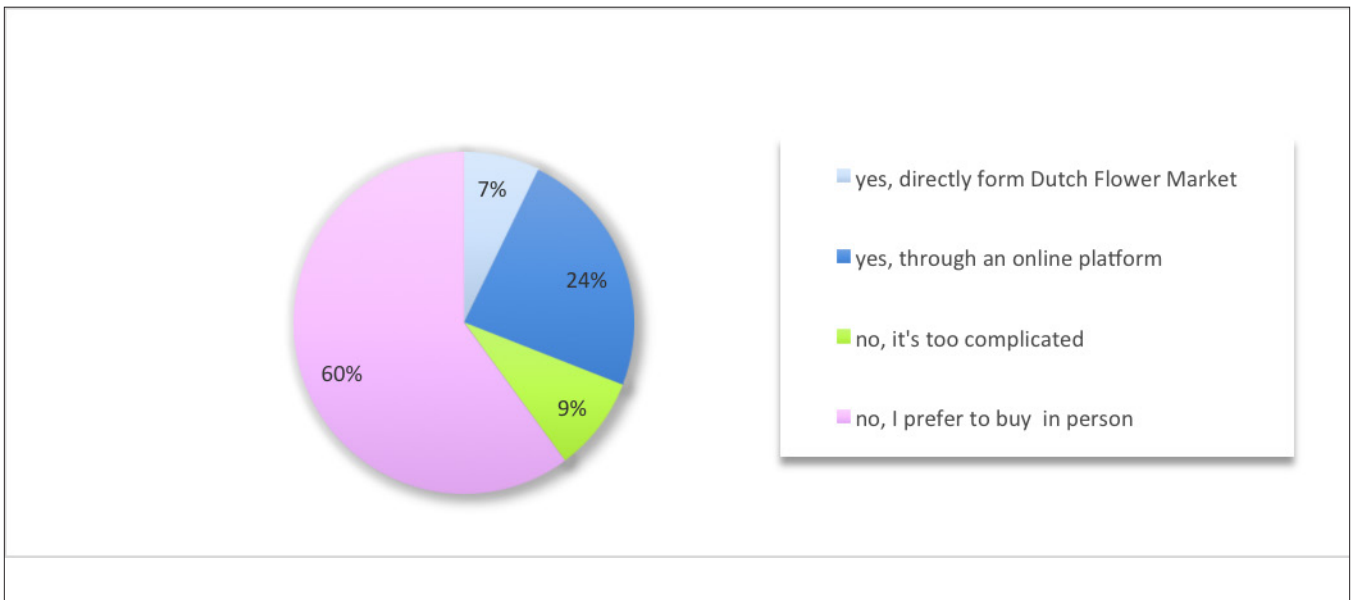


In the age of intensified services available on sales platforms, it is impossible to omit this form of sales and orders done by florists.

As the diagram below indicates, the majority of respondents are in favor of making purchases in person, but a quarter of those surveyed say they are buying through an online platform.

This result indicates the habit of traditional flower purchases is still popular, but also shows the growing trend of using modern solutions.

This shows their aim for better time consumption and more efficient organization of their business and an increasing trust in flower suppliers.



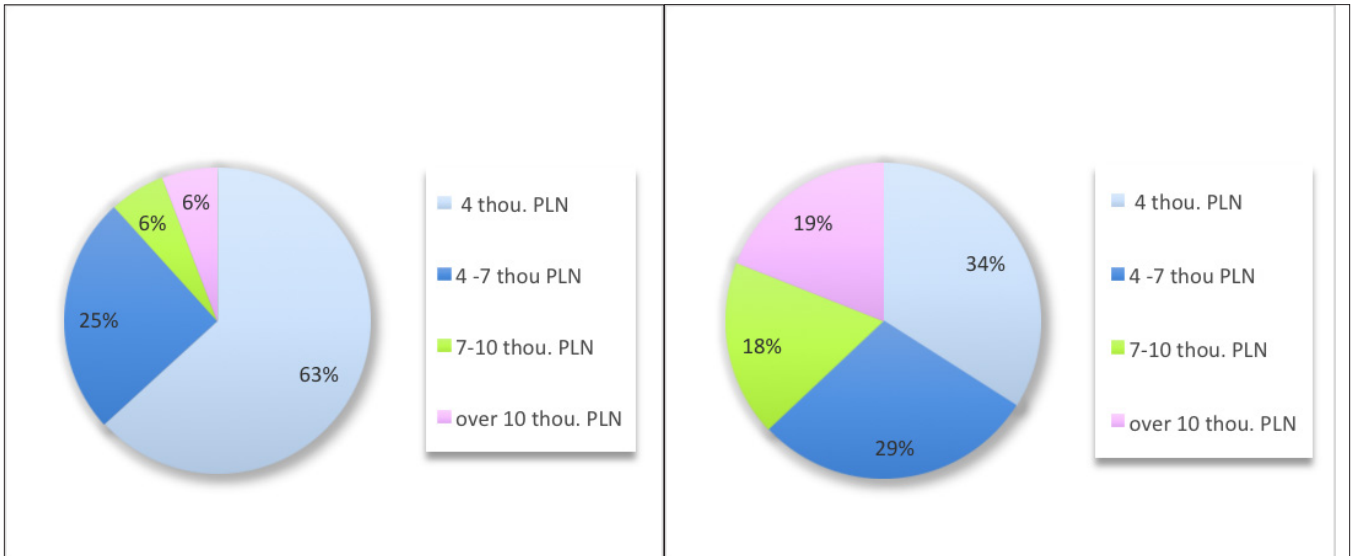
Ordering flowers means spending money. It turns out that respondents showed a relatively proportional distribution of expenditure for purchasing of cut flowers.

Most florists, in this case 1/3, admitted that they spend no more than 4 000 PLN, but almost 20% declared spending more than 10 000 PLN per month on flowers for their business.



### Flower shop owners

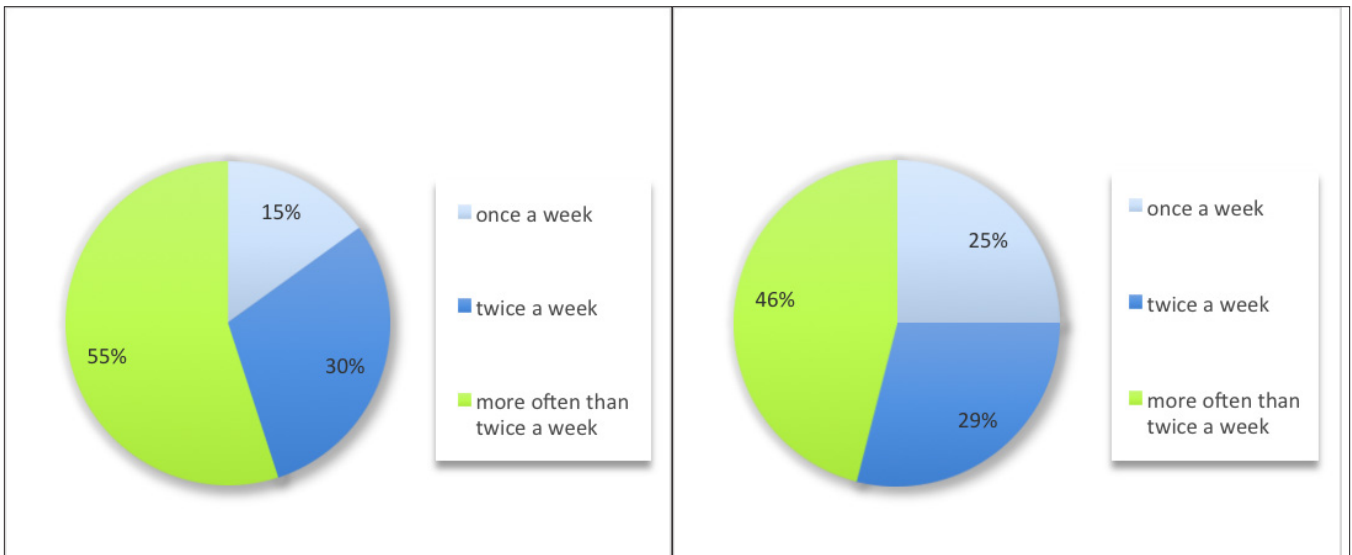
### Self-employed florists



**Both the owners and employees of the flower shops demonstrated a similar tendency in spending money for flower purchase. The group of self-employed florists showed much lower budgets for flower purchases (overwhelming majority of responses).** This indicates a smaller scale of service development by the latter and smaller number of customers compared to regular flower shops.

### Flower shop owners

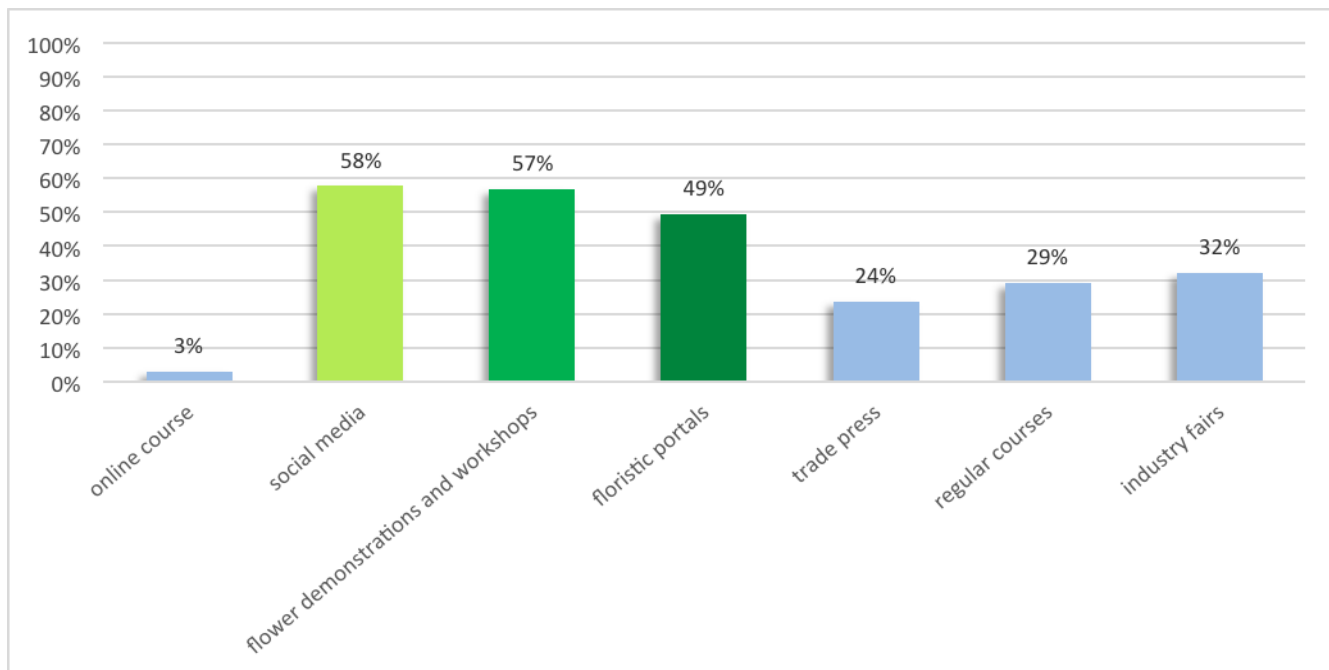
### Self-employed florists



Half of the surveyed flower shop owners and employees declare that they buy flowers more than twice a week to stock up the shop. In turn, half of self-employed florists has admitted that they only shop once a week. This indicates a significant customer interest and a relatively stable level of sales of fresh flowers, which translates into the bigger need of supplementing the flowers.

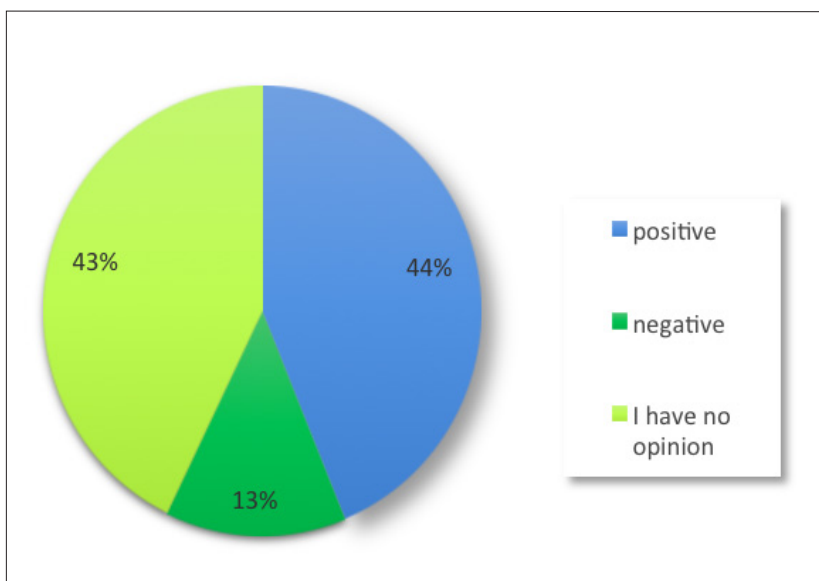
## Education

Polish florists get the inspiration and knowledge about trends in floristry from:



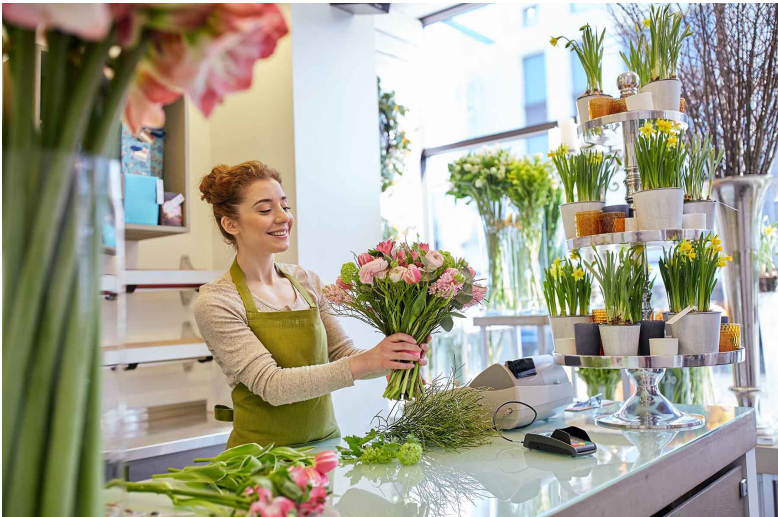
Most of those surveyed indicate that social media (58%), floristic shows and workshops (57%) and floristic portals (49%) are the best inspiration sources. Almost half as many florists visit industry fairs (32%) and attend regular courses (29%).

In view of the expanding offer of schooling and floristic courses, it is worth seeing the opinions expressed by florists themselves.

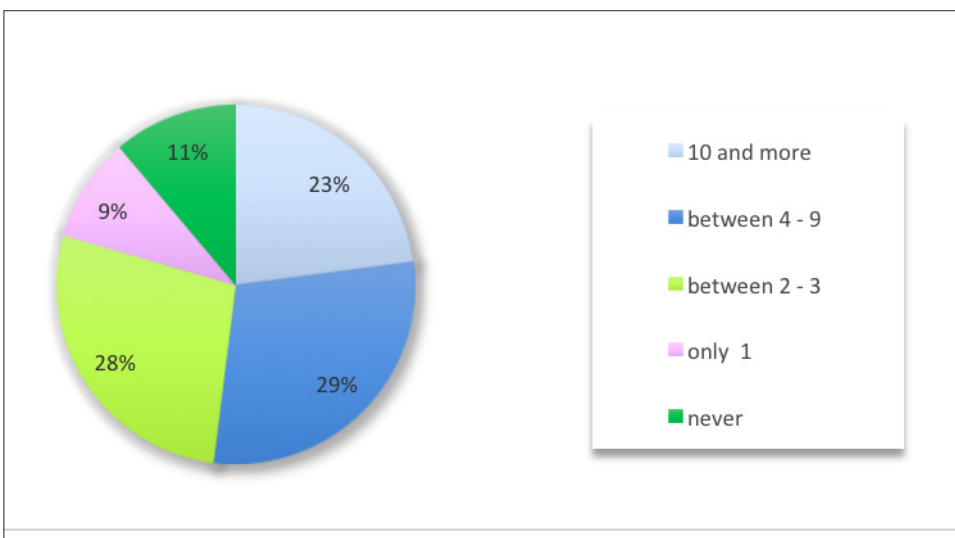


44% of respondents gave a positive assessment of the available schooling, but almost the same amount (43%) admitted that they have no opinion. In turn, 13% of florists negatively rated the schooling.

In view of the above results, we may say that more than half of respondents are not interested in the educational offer dedicated to the flower industry, neither this form of education is attractive enough to be assessed positively.



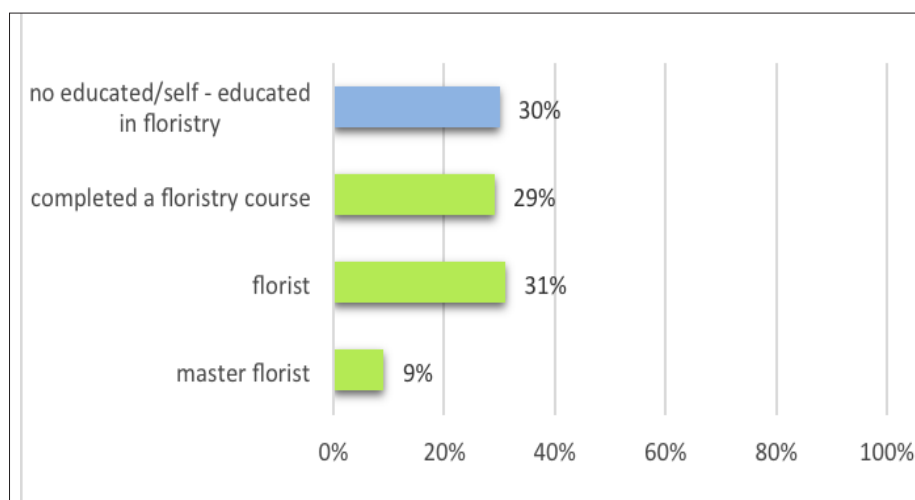
How many floristic courses you attended?



Analyzing the above data, it can be stated, that half of the respondents actively improve their skills and regularly attend floristic courses. At the same time, as many as 1/5 of florists has stopped on basic knowledge or have never reached for the floristic education, which means that floristic training schools/companies have great potential for development in Poland.

Additionally, more than two-thirds of florists want to develop their creativity and follow the trends. Slightly smaller, but still large group (60%) has expressed interest in improving floristic techniques. Few florists were interested in business development trainings.

31% of respondents confirmed that it holds a title of florist, almost the same amount (30%) admitted to have finished a floristic course and, only 9% of those surveyed are proud to have the title of Master Florist.



It should be considered important that nearly one third of those surveyed admitted that they did not have any floristic education/self-educated.

This confirms the conclusion that floristic trainings in Poland should continue and have the potential to develop, because only professionals have the chance of staying and being competitive on the market.

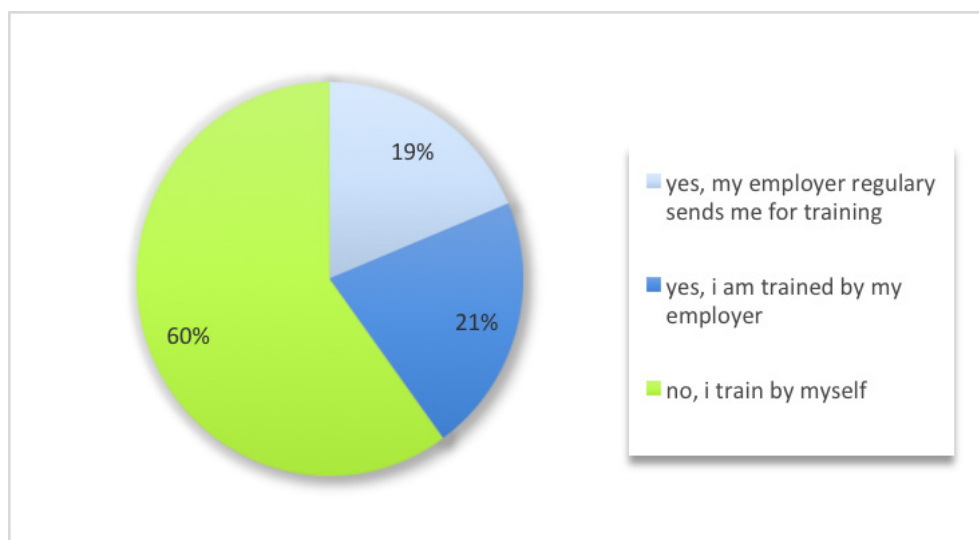
Even if, the current uneducated florists do not want to invest in their knowledge themselves, they will soon be driven out of the market by those trained and on time with trends. Ultimately, it is the client who supports or departs from florist by his decisions.

## Training of employees

Flower shop owners are aware of the value of knowledge and training of their employees. As many as 3/5 of the owners claim, that they train staff in person and 1/3 of them pay for trainings of their employees.

On the other hand, only 2/5 of employees admitted, that they were trained by their employers in person or in the form of other trainings. This means, that as many as 60% of flower shop employees

believe, that the employer does not invest in their professional development.



The discrepancy in this data may be caused by different understanding of the meaning of training.

Employees do not consider as training the everyday instructions, comments, corrections or demonstrations.

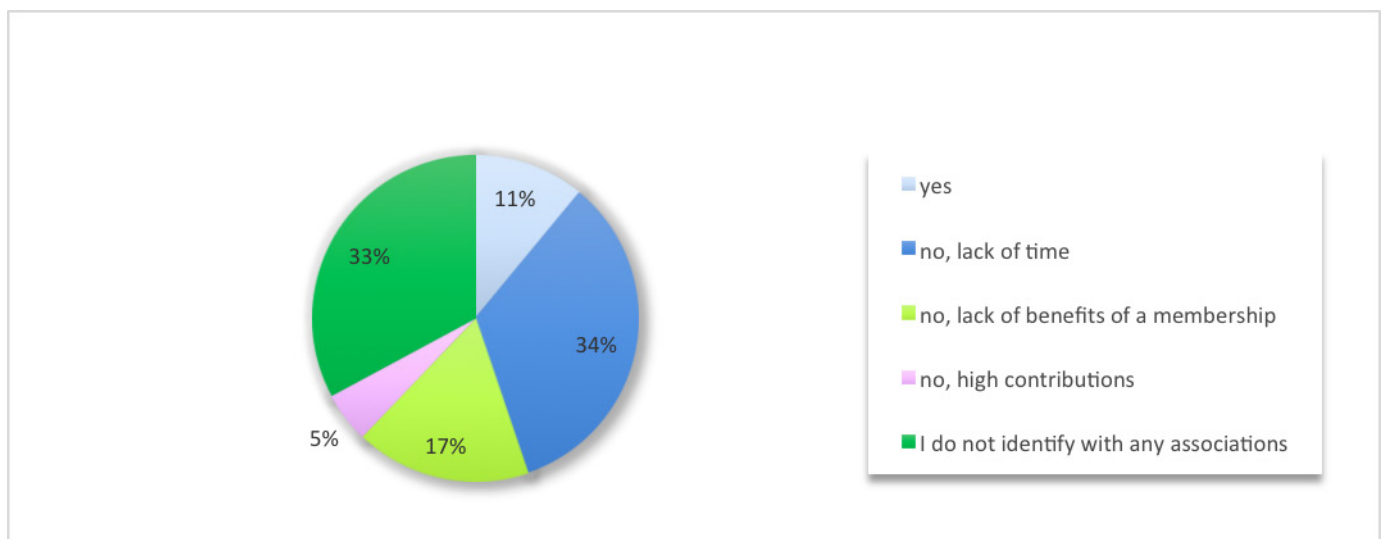
More than 27% employers employ trained florists, most probably assuming that there is no need to further improve their qualifications and 11% of flower shops declared, that their employees are trained on their own. It should be considered valuable that educated florists feel the urge for further education: seek new solutions and techniques.

It is worth noting, that the flower shop owners, for the most part, have professional knowledge: almost 3/4 of those surveyed are educated florists. This allows to hope, that they are giving their employees proper floristic trainings.

## Branch organizations

The main purpose of associations and non-profit organizations, is to actively support the flower trade and florists. Through integration of the floristic environment they should support the development and promotion of the sector. They should help with education by organizing trainings and industry events shows, workshops, fairs, as well as support economic activities in the flower sector.

Therefore, it is puzzling that **very few florists (11%) declare membership in an industry association**. Most of them do not identify themselves with any associations and admit that they lack time to participate actively, and do not see any benefits of being a member.



So what do the florists think, the main beneficiaries of the performance of the associations?

The question was formulated in the form of an open discussion, which defined the assessment and key opinions of the floristic industry. The results were distributed relatively evenly: **44% of respondents positively assessed the associations' performance, 30% gave a negative rating** and 26% admitted that they had no opinion on this /had not heard of the associations and their activities.

**The main advantages of the florist association** were: promoting floristry during industry events (floristic shows and demonstrations), presenting current trends, exchanging experience and establishing contacts with other florists, supporting the members and , for example, organizing EuropaCup 2020 floristic championship.

**The most important negative opinions** are: not satisfying activity and recognition of the association itself, lack of activities consolidating and supporting the floristic business, e.g. support in eliminating private people (consumers) buying at wholesale markets, which is a key problem for Polish florists, lack of rational benefits for florists, only occasional local activities, activities always in the same locations (Poznan, Turza Śląska - Silesia), hermetic environment.

This is an important signal for trade associations, as people generally gather around initiatives in which they see benefits. This means that the associations themselves have to improve their scope of activities and the offer for florists. Especially that florists are very clear in their expectations. They keenly undertook the discussion on the role of trade associations in the Polish florist environment.

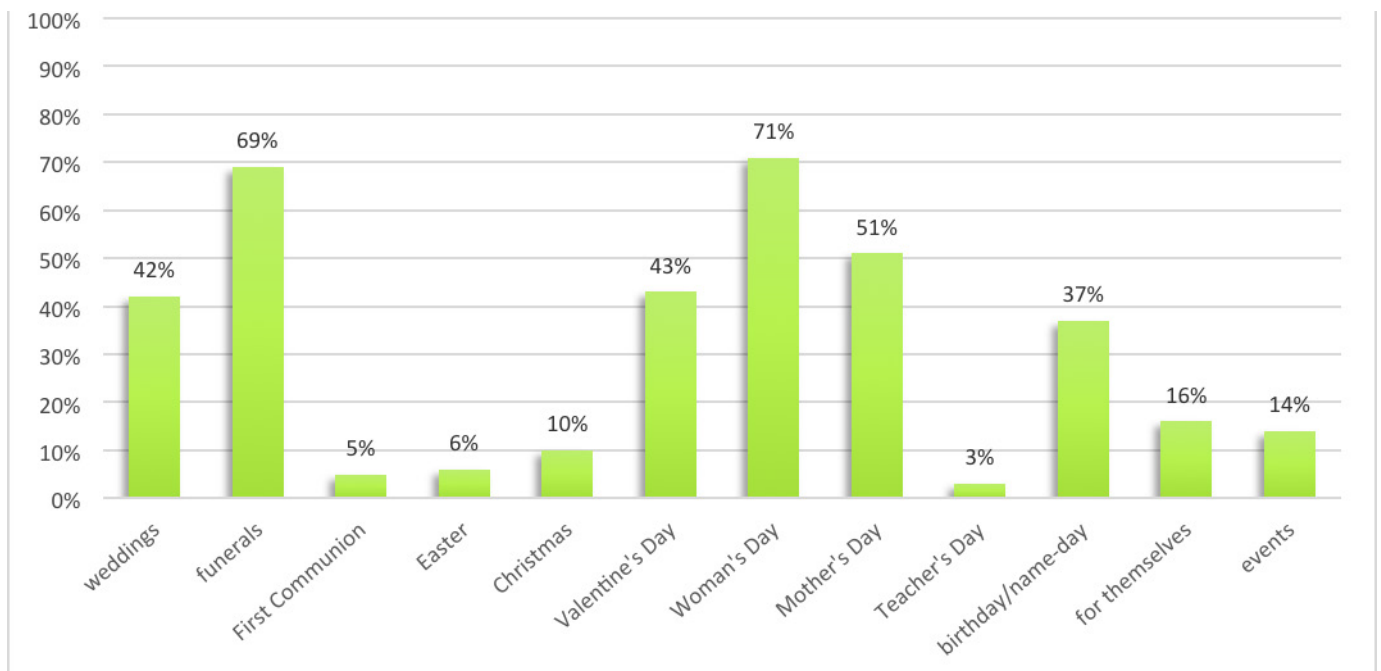


## Sale, offer, promotion

This section of the study focuses on the important business side of floristic activity i.e. on sale, offer and promotion. It profiles data about the business characteristics, its profitability, recognition of competition, and promotional activities dedicated to customers. Most of the questions are multiple choice questions.

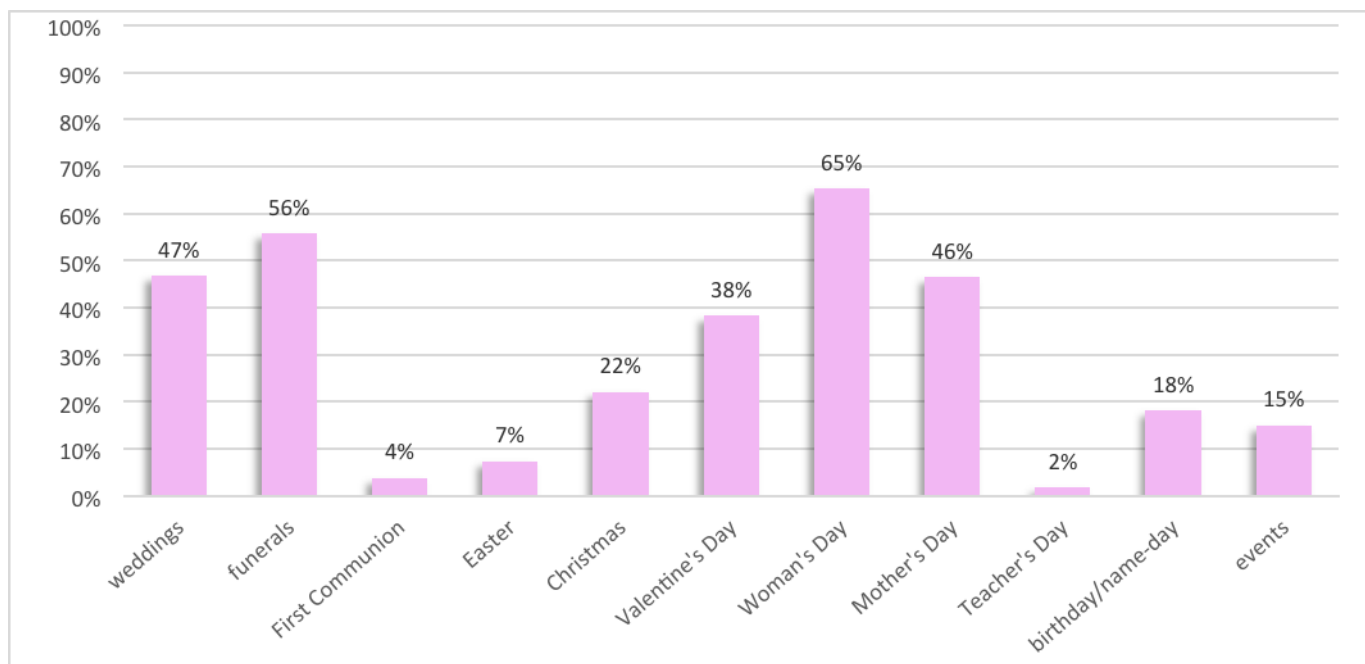
## Sale of flowers...

It turns out that clients mostly buy flowers for Women's Day – that is how 70.52% surveyed responded. Funerals were the second most popular, flower giving occasion (68%). Then came Mother's Day (51%) and wedding (42%).

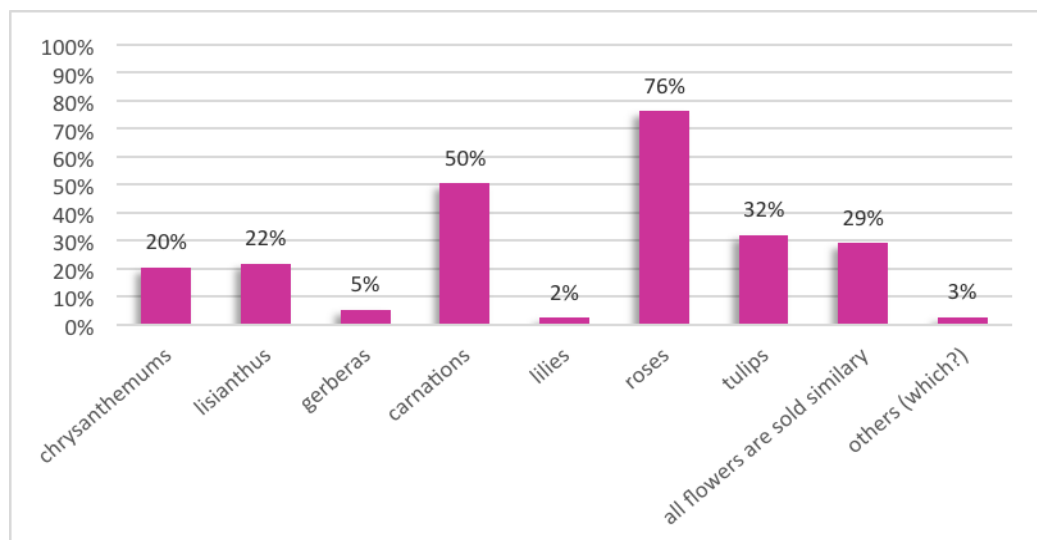


The tradition of flower giving is the key element for the development of flower market in Poland. The multitude of flower giving occasions is a great opportunity for florists to present their work and ideas transferred into flower compositions, to inspire clients and strengthen their position on the market.

Interesting is the relatively low demand for flower decorations in times considered as most important floral moments i.e. Easter and Christmas. The survey confirms the trend of giving less flower bouquets for weddings.



Respondents in the vast majority (76%) confirmed that roses are still the most popular flowers. Next came carnations (50.4%) and tulips (32%). As additional flowers, interesting for customers, the florists mentioned freesias and seasonal flowers: dahlias, peonies, ranunculus.



To clarify data on the cut flowers sales, respondents were asked to give the average bouquet/composition price in their flower shop/studio. 60% of florists indicated the amount of PLN 30-60, and almost 30% of those surveyed declared PLN 60-100 as the dominant bouquet price.

It is worth mentioning the fact that nearly half of florists care about ensuring the freshness of the offered flowers and conditions them after purchase. In addition, 1/3 of those surveyed confirm, that they provide sachets with a flower conditioner to each bouquet. This gives a positive picture of the floristic industry in the context of good care and handle practices having in mind reputation among customers.

## ... and plants



In the times of strong ecological trends and growing need to surround oneself with plants both: those beneficial for human health and the blooming ones, potted plants have become a fashionable element along with cut flowers.

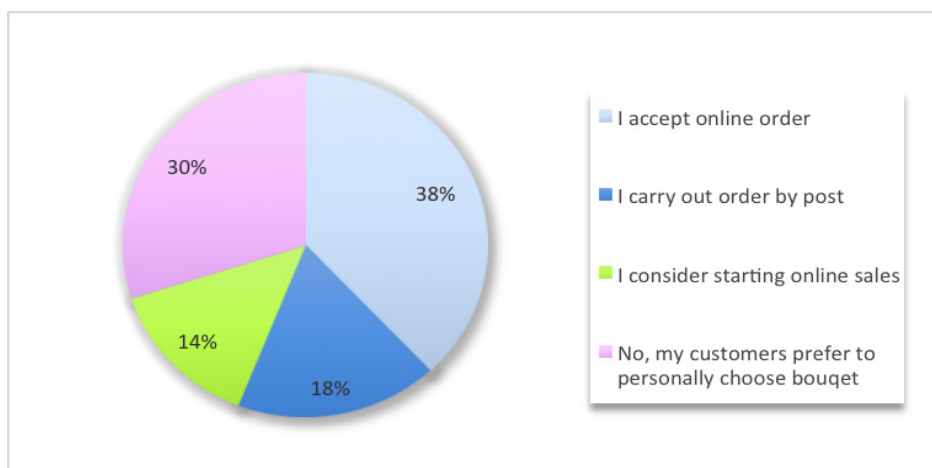
Almost all respondents admitted that their offer was expanded with pot plants.

An almost even distribution of interest was observed as to flowering plants (51%) and the green plants (41%). This shows the ever-increasing demand for pot plants among customers. Plants became a constant part of assortment offered by flower shops.

## Promotion and offer

As the most popular form of promotion, florists indicate discounts for regular customers (61%) and special occasion promotions (19%). Unfortunately, nearly 30% of respondents admitted, that they do not offer any discounts. As additional promotional activities, florists pointed out: competitions for customers, weekend promotions for the vase cut flowers, 'happy hours', customer cards, seasonal promotions and group discounts: for young couples, for seniors.

Online promotion and sales have also become an important element of flower business. It is an excellent way of acquiring new customers, by communicating current offers and promotions and presenting completed projects and arrangements. Polish florists closely follow and implement online sales activities.



Thus, 38% of those surveyed confirmed, that they accepted online orders, 18% admitted, that they only carry out flower orders by post, and almost the second as much consider starting online sales.

The remaining 30% of those surveyed say, that their customers prefer to personally choose flowers and see the ready bouquet.



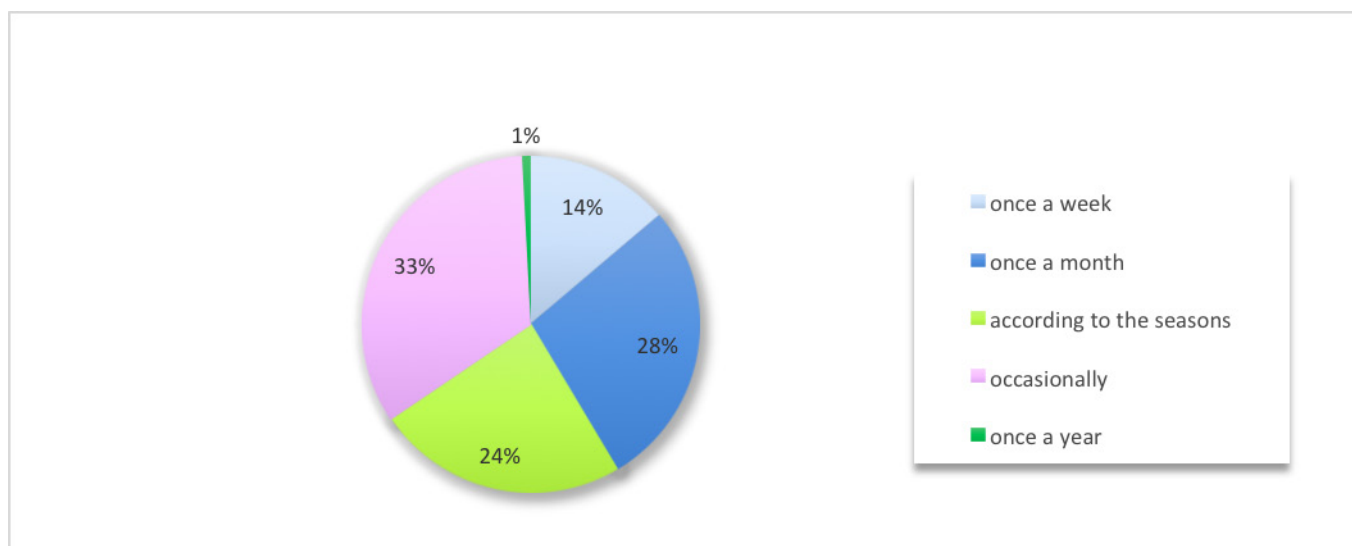
Given a wide range of promotional activities at their disposal, respondents chose those they use most often in their floristic business. Most of them (81%) use social media profiles and dedicated websites (38%). A smaller role in promoting business was given to tools such as posters and street displays / stands (21%); registration in databases of flower post(19%) or registration in the databases of wedding portals (16%).

Respondents have identified some other ideas as a valuable form of promotion of their business: wedding fairs, floristic shows and workshops, sponsorship of local events and charitable actions, word of mouth marketing and advertising banners.

## Merchandising

Well-arranged and seasonally changing exposition is a very important presentation element. It positively affects the image of the flower shop and attracts the customer's attention to new, fresh floral arrangements, inspiring to a spontaneous purchase.

Apart from the inner flower exposition, (36%) of florists decorate the shop windows and arrange expositions outside the shop (36%). These forms of presentation are an excellent way of inviting customers to see the whole offer and purchase flowers.



The results of this study indicate that florists still do not see the importance of merchandising. Most of them, 33% of those surveyed admitted, they change the exposition in the shop occasionally, 27% said they were changing the exposition once a month, and a quarter of them do so only with the change of season. Only 13% of respondents change their exposition once a week.

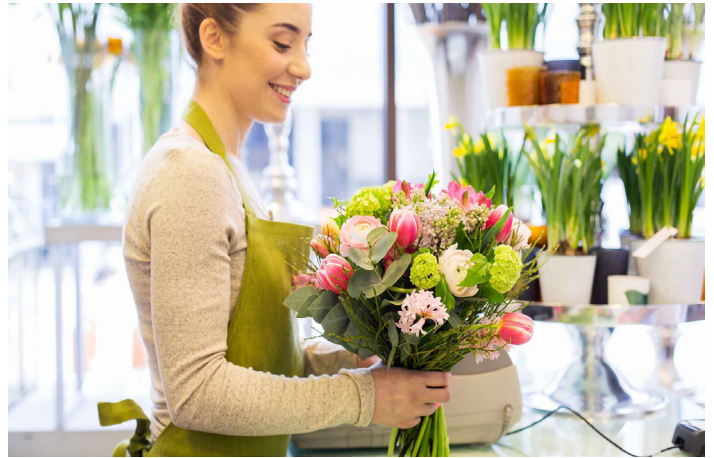
Considering the promotional activities, the florists are facing a significant role of the competition. **Discounts and supermarkets (75%) are considered as the greatest competition. Other florists (45%) are also considered competition.** Street vendors/stalls (21%) are of lesser importance, and gardening centers (14%) are the smallest competition.

It was observed, therefore, that despite the rich offer of beautiful flowers and plants, and most important, the professional floristic services, Polish florists continue to struggle with the loss of customers in favor to supermarkets.

## Customers

The key to defining the attractiveness of the flower offer is good communication with the customer, knowledge of his needs, taste and shopping habits.

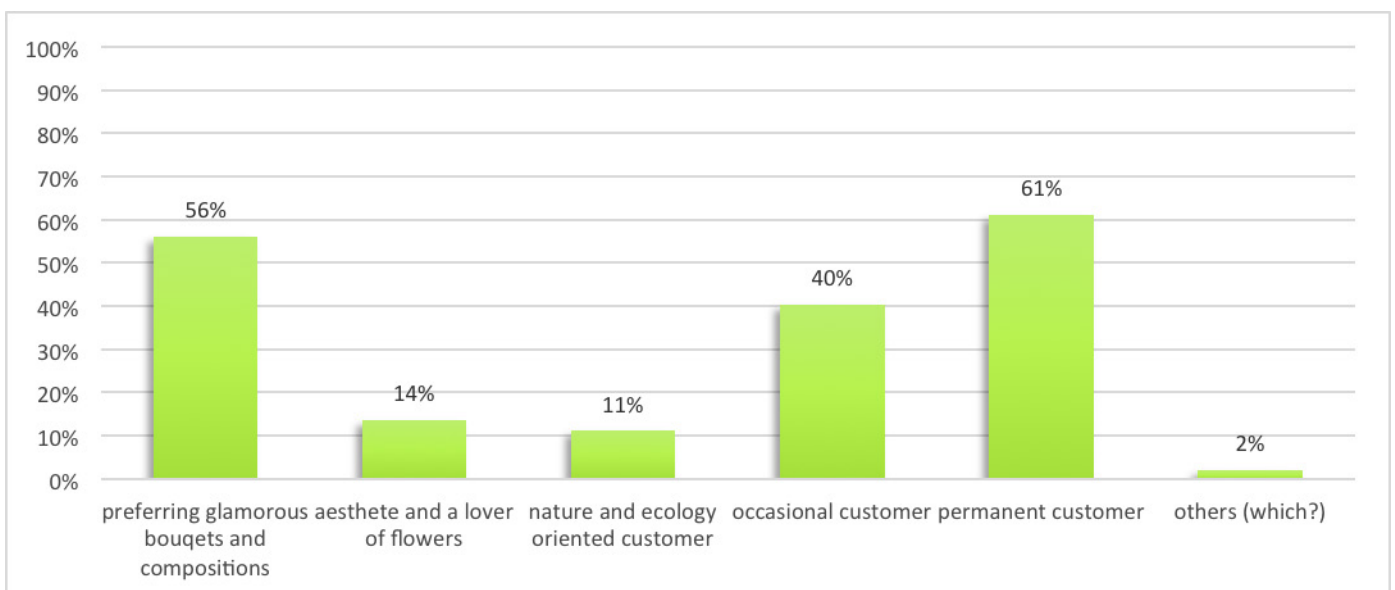
The florists' awareness of their own customers was therefore examined. The vast majority of respondents (71%) **confirmed that they have mostly regular customers, and only 20% indicated having new customers who later return regularly.**



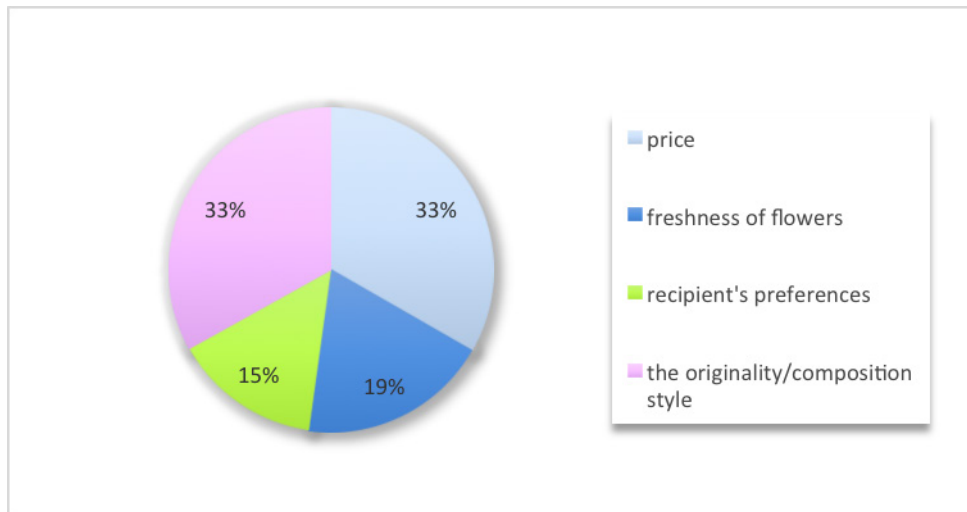
As other customer categories, respondents mentioned some new, occasional customers, customers recommended to them and acquired through online promotions.

It should be considered **interesting for the flower market, that 42% of respondents confirm that their customers expect novelties and an original flower offer.** However, 34% of florists say that their customers have high expectations for a low price. Only 13% point to low client expectations but openness to the offer, and 9% say, they have demanding customers, with their own visions. This confirms the market concerning floristic services, such as: openness to novelties, originality and new trends.

The customer type determines the needs as to floristic services, which in turn reflects the level of profits in the flower shop. Respondents asked to indicate a customer type pointed to permanent customers (61%) and preferring glamorous bouquets and compositions (56%) are giving the most profit to their business. 40% said that good profit is made on occasional customers.



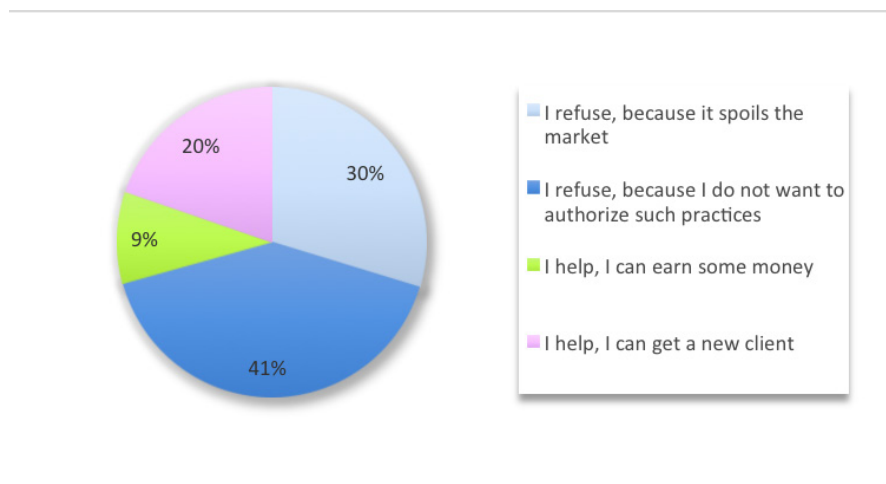
## Customer preferences



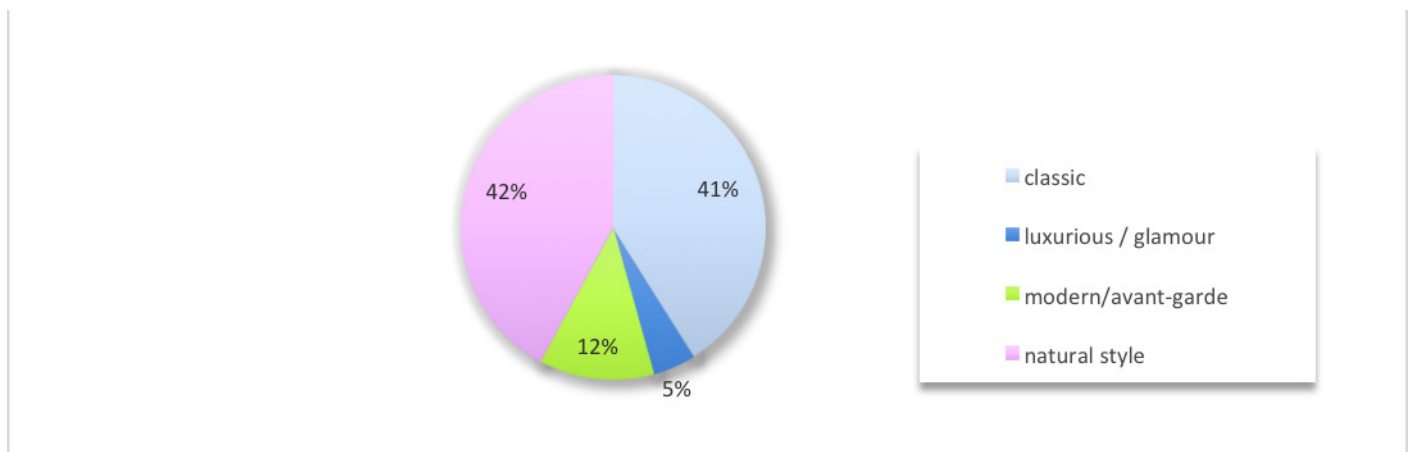
1/3 of the respondents confirm that their customers are price driven, and exactly the same amount indicate that customers value the originality and composition style.

The latter result indicates the Polish customers are more and more demanding and aware.

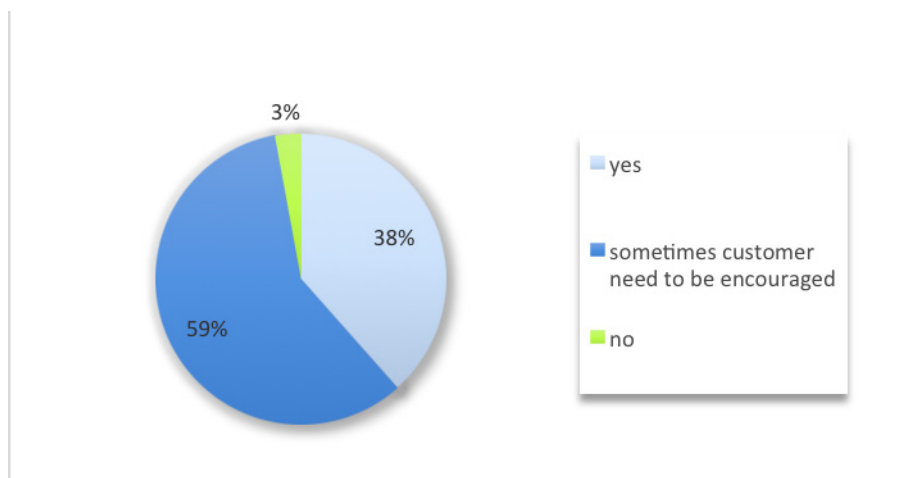
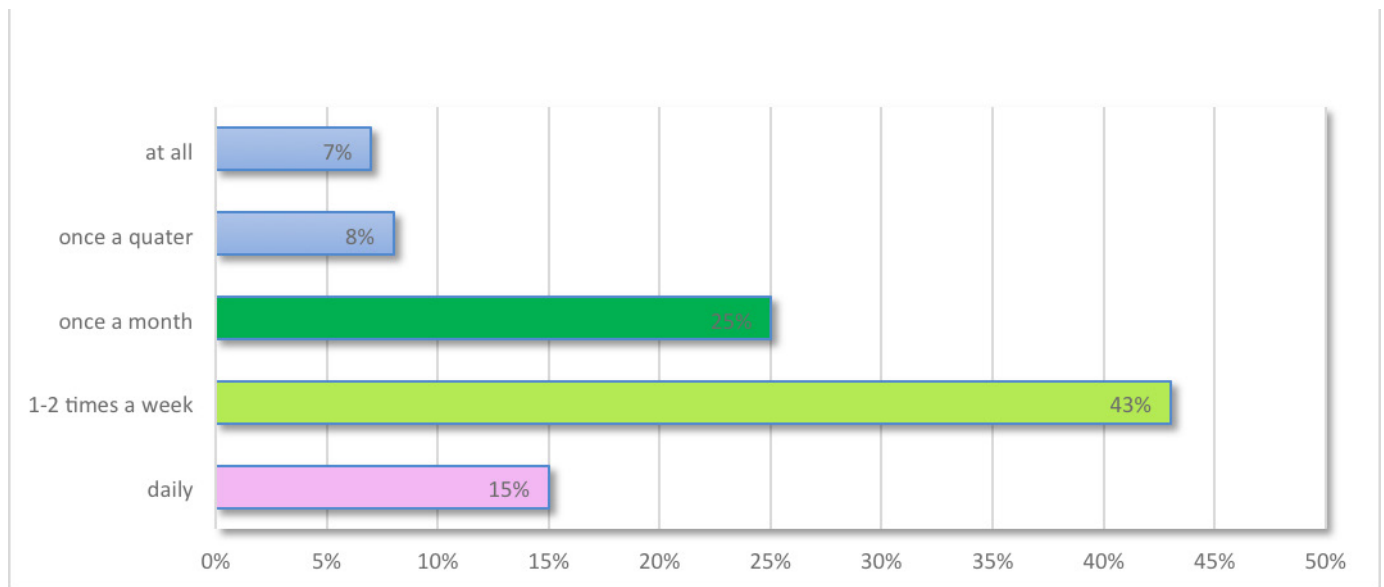
As non-standard customer expectations, we can consider requests to arrange and/or pack flowers/plants, bought from another source. The florists have overwhelmingly declared that this kind of service is being denied, because they do not want to authorize such practices (41%) and because this spoils the market (30%). This is evidence of high image awareness of the floristic industry.



Meaningful is the fact, that customers are constantly following trends and are choosing original forms of bouquets. 42% of respondents say that natural style bouquets are the best-selling and the part of respondents indicate, that their customers prefer classic bouquets.

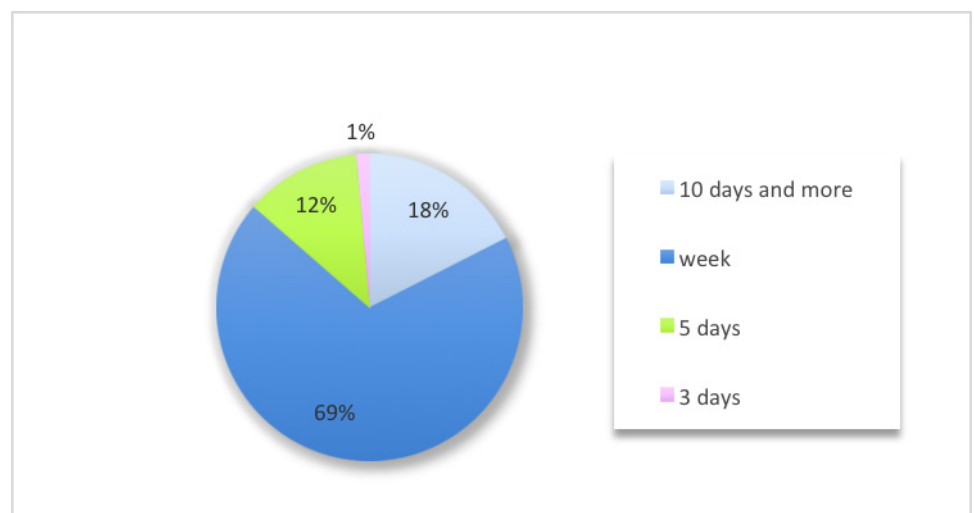


At the same time, nearly half of respondents (43%) admit that customers buy fashionable bouquets and compositions 1-2 times a week, 25% - that once a month. The daily sale of fashionable bouquets is declared by 15% of those surveyed.



Customers are more willingly (38% of answers) reaching for novelties on the floristic market, and more than half of those surveyed say, that some customers are convinced to buy the latest proposals of flower producers.

Customers' expectations as to the flower vase life are quite significant. The vast majority of florists (69%) say customers prefer flowers that will last for a week. And nearly a fifth of those surveyed indicate that their customers expect the flowers to last for 10 days or more.

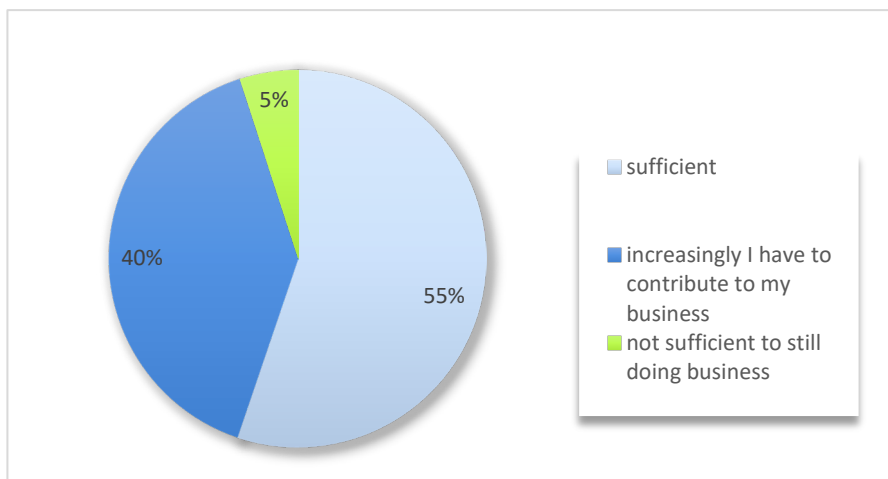


## Market development and future of my business

This section of the study addresses issues of business plans, strengths and weaknesses of floristic activities, vision of the future and direction of developments of the entire flower sector.

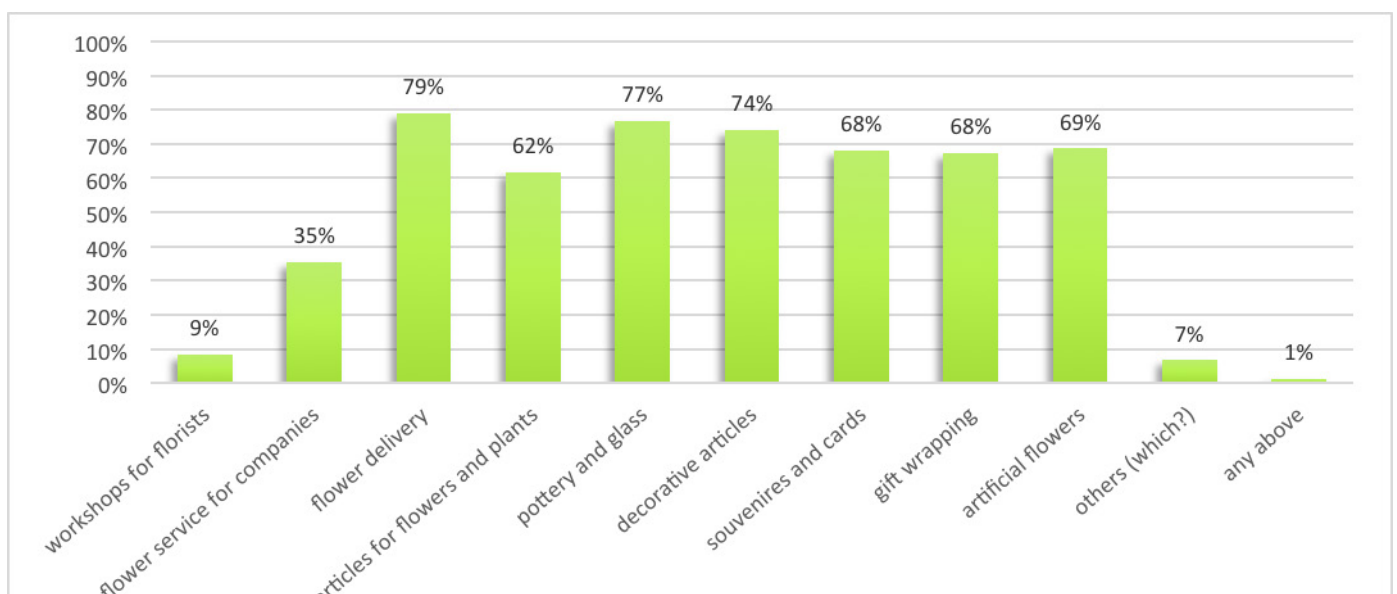
An open-ended question is the key tool here, which has allowed to identify both the advantages and problems faced by the floristic trade.

The satisfaction of florists in terms of income from their business was measured.



Over half of the flower shops (55%) declare that they earn good money. At the same time, a big group of respondents (40%) admit that their income is unsatisfactory, so they should improve something in it. Flower sales and dedicated floristic services are key factors of the floristic business.

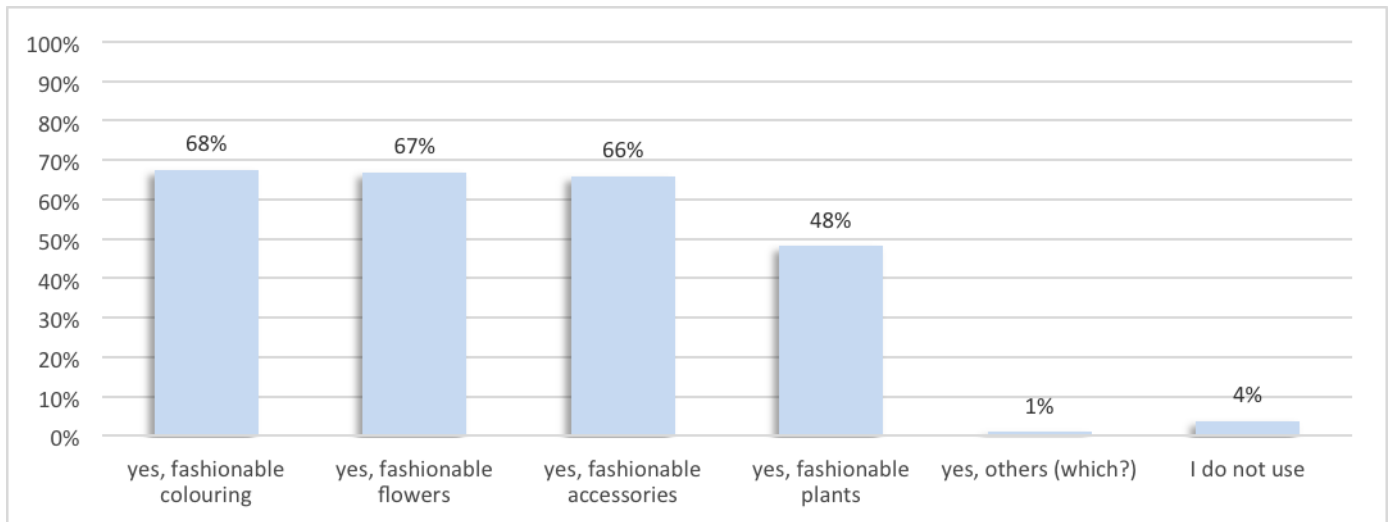
However, florists need to increase their income, therefore offering additional services and products. The respondents identified other products that help them increase their sales levels. It shows how inventive florists can be in order to stay on the market.



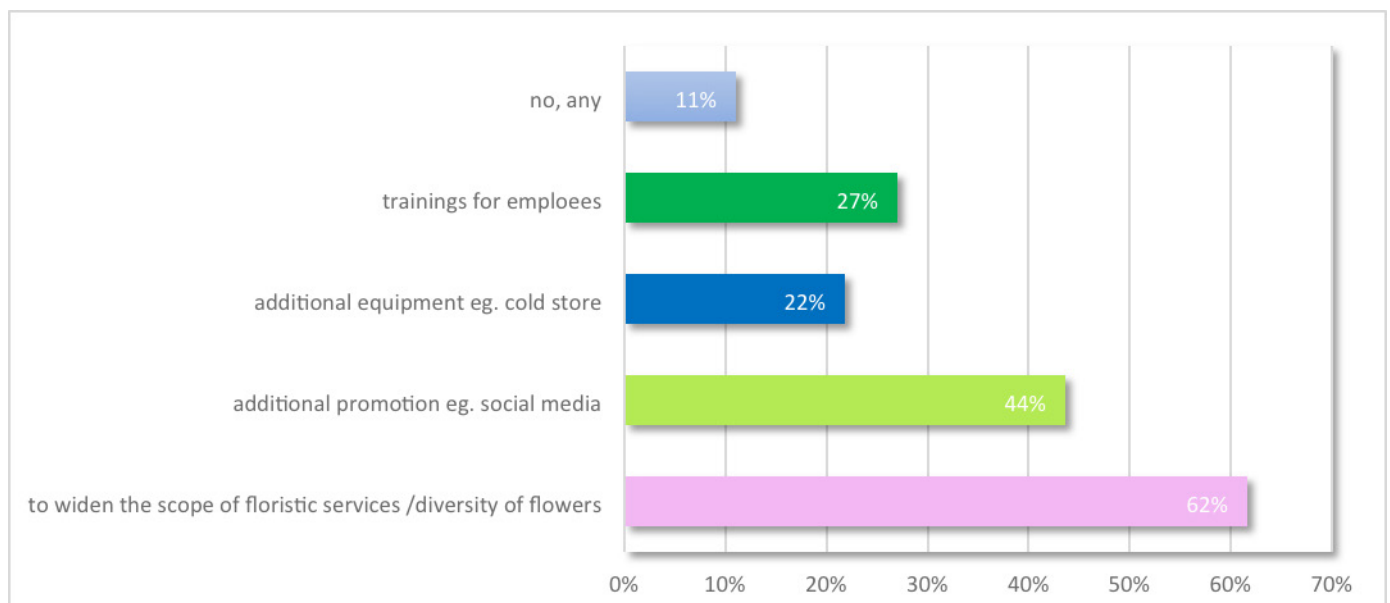
Only less than 2% of respondents sell flowers only. Luckily, more replies indicate activities that are flower related like: deliveries of ready arrangements (80% of florists are flexible with deliveries) or services for companies (flower arrangements) are keeping over 1/3 of the respondents busy.

Other services were listed: arranging interiors with pot plants, vertical gardens, pot plant compositions: forest in a jar, workshops for children, garden designs and services.

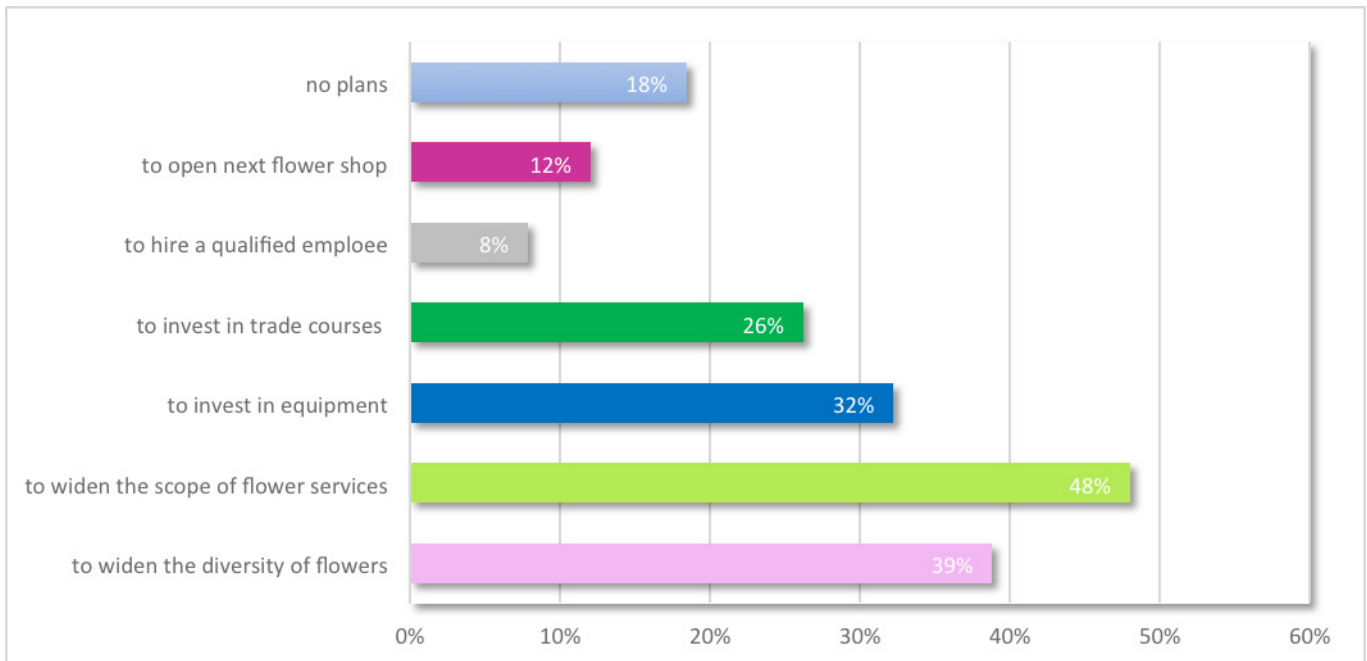
**Almost all florists agree that they are aware of the developments in the flower market and are happy to follow the trends for their clients.** They successfully use fashionable flowers, accessories and fashionable colors in their work, not forgetting about the growing role and popularity of healthy pot plants.



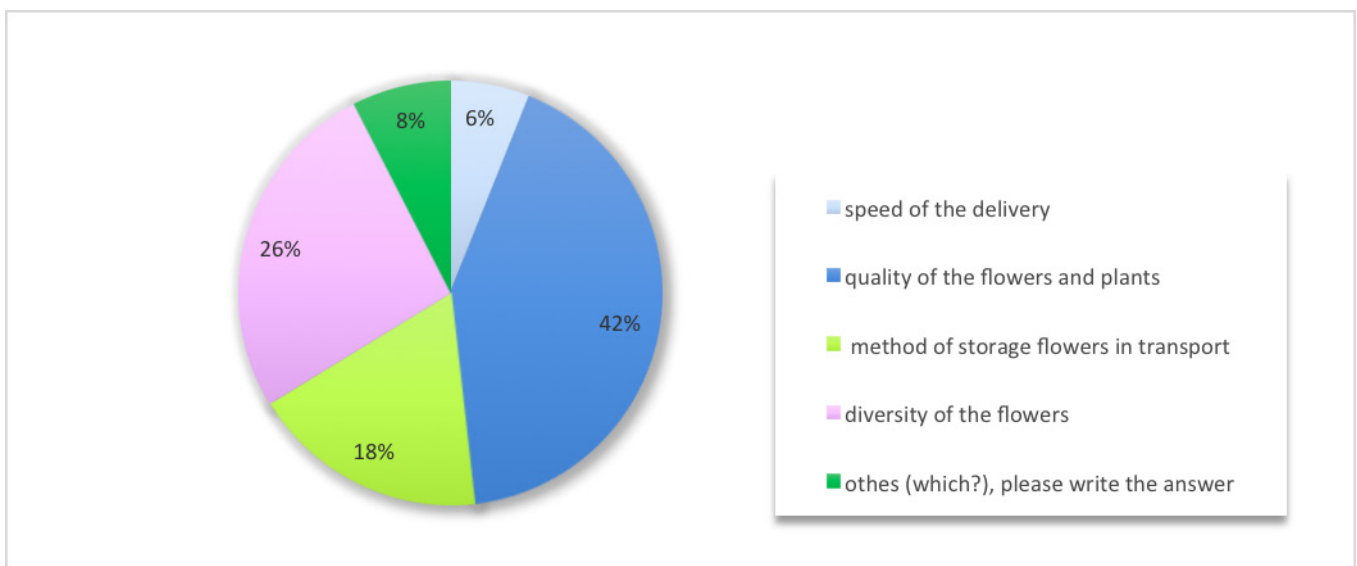
Constant development of the business is an important factor for Polish florists. Equally important is acquisition of new clients. **The majority of respondents (62%) point out that they intend to achieve those objectives by broadening the flower offer and floristic services**, while taking effective promotional activities e.g. promoting the use of flowers and services on Social Media (44%). Other measures include investing in employee training (27%) and in the purchase of equipment for flower shop/studio, e.g. cold store (22%).



**Acquiring new clients is a major challenge for the florist industry, due to big fragmentation of this kind of activity in Poland.** Nevertheless, nearly half (48%) of the respondents said, they planned to widen the scope of floristic services and the diversity of flowers (39%). Bit less (32%) declare investment in equipment and (26%) in trade courses and trainings.



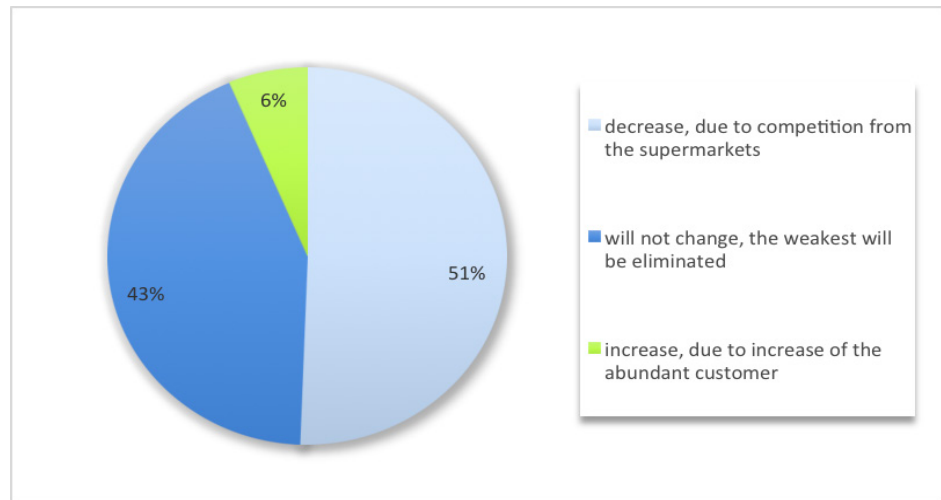
The wholesale flower market plays the key role in improving the quality of flowers and therefore floristic services. Florists were asked what should be improved in the wholesale sale of cut flowers. **Most of the respondents indicated that the quality flowers sold required improvement (68%) and the diversity of the assortment should be improved(42%).**



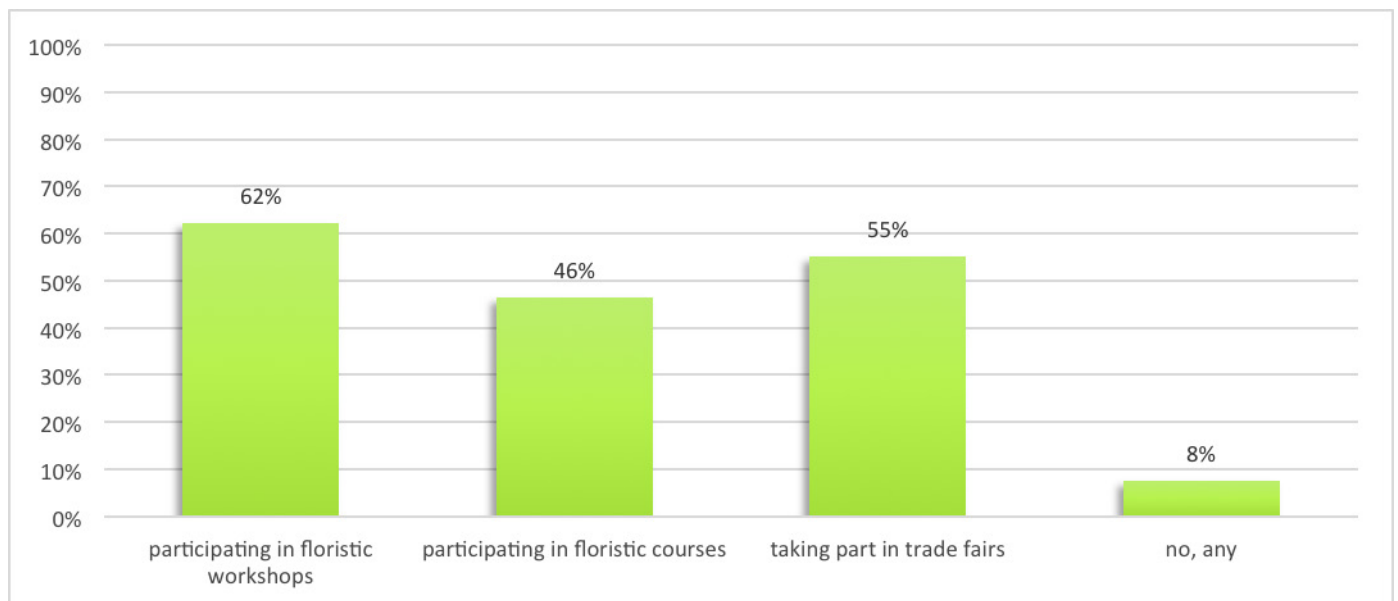
In addition, all respondents acknowledged that in order to solve the ever-recurring problem that effects the functioning and development of floristic industry, it is necessary to restrict access to wholesale sales of flowers for retailers and HoReCa companies. This confirms that verifying and “sealing” the sales process is of major importance for the future of florists in Poland.

The data indicated above confirm quite a pessimistic vision of florists about their future on Polish flower market. More than half of those surveyed admit that the number of flower shops will decrease, also due to strong competition from the supermarkets.

However, 43% of those surveyed say that the number of flower shops will not change, as the weakest will be eliminated and new will appear together with the existing ones that will be improving their offer. The florists point out to the need of developing their skills.

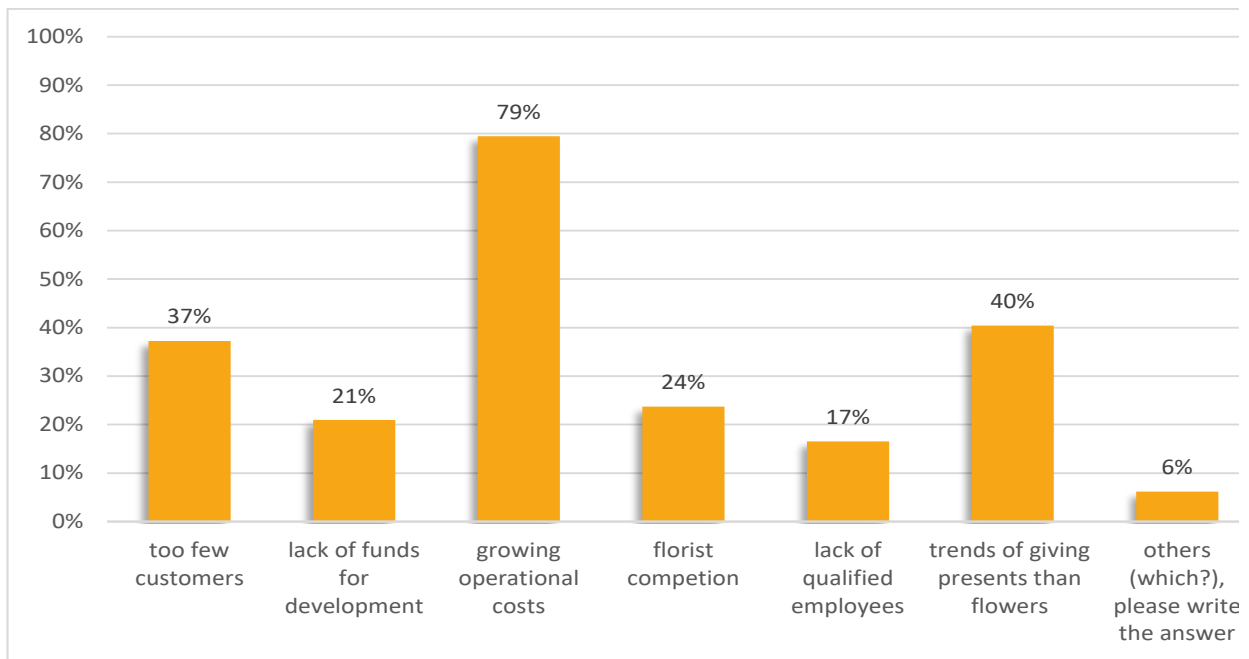


In future, they want to make use of the wide educational offer, mostly taking part in floristic workshops (62%), participating in floristic courses (46%), and taking part in polish and foreign trade fairs (55%).

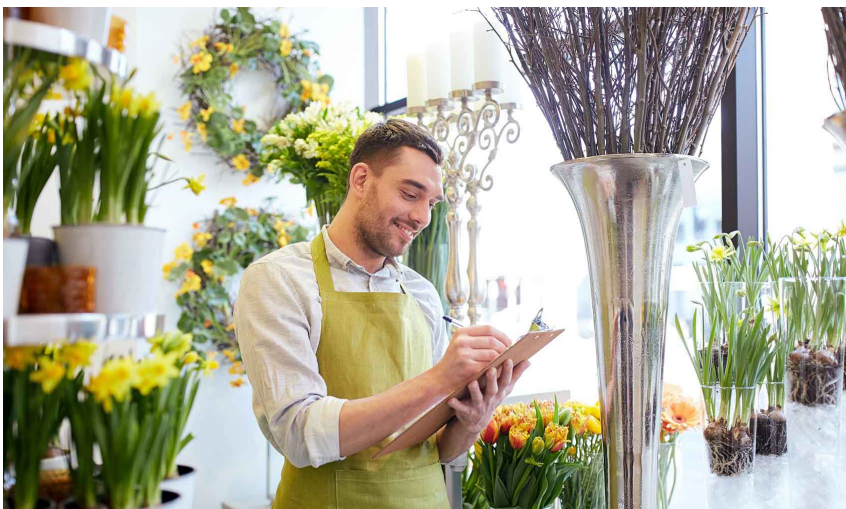


As the greatest threat to their own business the florists recognized: growing operational costs (79%) and the prevailing trend of giving other presents than flowers e.g. wine instead of a bouquet (40%) and too few customers (37%). As important risks, the respondents name: retailers buying at wholesale places creating the “grey market” – florists without registered business, the lack of active consolidation of the floristic trade.





## The future of flower business in Poland



Polish florists are ambitious, they want to improve their professional skills, follow international trends and be able to influence their clients. Flower business is not one of the easiest ones, there are still many problems, obstacles and things that should be changed or improved. That is why running a floristic business in Poland is still a challenge.

### The flower sector

Polish florists are not fully satisfied with the current shape of their sector. Many of them say that the flower sector in Poland is not supporting them. Florists often mention the important problem they face within the most important part of the flower chain: wholesale markets and wholesaler who are selling flowers, plants and ready arrangements directly to the end customers. Therefore the majority of Polish florists are complaining that wholesale markets are in fact competing with them instead of supporting and supplying them. Many flower shop owners complain, that private people are allowed to buy flowers directly at the wholesale markets. This way “stylists” and “florists” without registered companies, who decorate events (mainly weddings) are buying flowers at the wholesale price. This is unfair towards all those who are running a regular business, paying taxes and bearing the cost of running the flower shop, studio or workshop. This is spoiling the trade as the consumers get lower prices (without VAT) and later demand such prices at regular flower shops.

## Polish consumers

Polish clients love flowers but are still extremely price sensitive (often raised problem in the questionnaire). Some of them “want plenty for peanuts” or buy directly at the wholesale markets and at wholesalers. They even buy flowers themselves for special events like weddings. Many florists underline the role of trade organizations which should influence wholesalers and wholesale markets to sell the products to registered companies only. This would solve the problem of individual clients buying at wholesale prices, creating the grey zone and an unhealthy competition.

Generally florists admit, that clients can be divided into two groups. Those buying cheaper flowers mostly from supermarkets or less skilled florists (who compete with low prices) and who therefore can afford flowers for own use more often than only twice a year. And clients who will visit a well-known professional flower shop on a regular basis to buy high quality products, stylish arrangements and bouquets.

## Quality and price

Other problem raised by respondents of the survey, is quality and price of flowers. Florists complain that flowers provided by importers and producers are not always of good quality. There are also opinions that in many cases the suppliers instead of lowering the price of older flowers, intentionally sells them in regular price. In contrast to that, many respondents admit that often the quality of flowers being sold at supermarkets is increasing and the price is very attractive. This results in a weird situation: the wholesale markets and wholesalers are offering more expensive flowers than supermarkets. It happens that the quality of flowers in supermarkets is better than that offered by professional suppliers. Obviously, such situation doesn't help professionals to stay competitive.

**The positive role of supermarkets:** thanks to the cheaper offer Polish consumers are starting to use more flowers on a daily or weekly basis. The improving quality of flowers sold in chain stores increase the number of clients who want to buy flowers there.

## Professional education

Finally, the respondents underline the importance of professional education and that it needs to be improved. At present there are only few private schools and 3 universities providing floristic education. Contrary to that, many semi floristic courses ‘produce’ florists without proper knowledge and skills, who also try to find their place on the market. The estimation though is that the under educated florists will have to shift to other sectors as the “flower awareness” of the clients and demand for high quality, nice arrangements is rising. The opinion of florists is that further education and skills development as well as following new trends is a key to be competitive and attractive for the client.

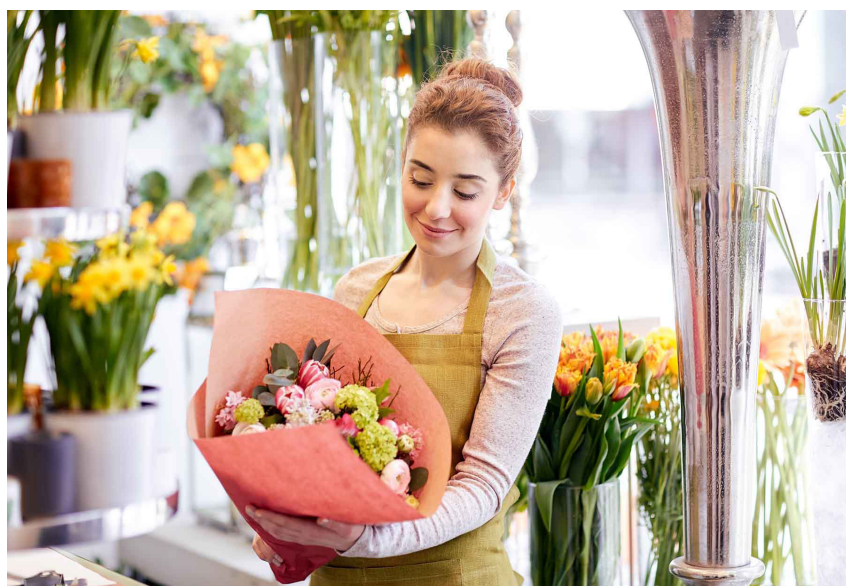
## Social Media

The majority of florists admit, that social media can play an important role in the education process of the client. It is a great tool to show florists' skills in diverse floral arrangements (that clients cannot create themselves), show new trends and educate on flower preservation at home. Showing flowers and plants nicely arranged can increase the demand for them among clients. This can create the demand to buy plants and nice compositions at professional florists and flower shops. According to Polish florists, online channels are great platforms for self-advertisement and can help to reach new clients. Social media can support further development of online flower shops in Poland. Some florists have seen a significant increase in sales through advertising via Internet (social media channels and flowers by post). We may say that the online marketing and sales are increasing though still Polish costumers tend to prefer buying flowers personally.

## New trends

Another very positive trend that can help the flower business nowadays is the trend for pot plants and natural decorations. This brings a bigger turnover in plant sales in many flower shops. Clients are increasingly aware of climate changes and are looking for more eco-friendly alternatives for cut flowers. This is the direction flower shops should take. Selling pot plants for terraces, green walls or plant lease for office spaces is being more and more popular in Poland.

## The culture of giving flowers



Poland has many occasions for giving flowers as presents (name days, birthdays, house warming parties, weddings, funerals etc.). The trend of giving flowers is changing though. Many of those occasions are vanishing in the floral calendar. They are taken over by supermarkets and their (cheaper) offer of presents or are being replaced by other trends like charity collections (animals, kids and poor or elderly people) or buying wine or chocolates 'instead of flowers'.

Still the tradition of buying flowers for own use is not very strong. Florists noticed, that two occasions: weddings (decorating the event) and funerals are developing well. There is a growing tendency to specialize in those. Funerals are very good floral moments, as traditionally in Poland flowers are brought as the last honor to the deceased. Also wedding decorations are having good times as many clients are looking for attractive decorations and are willing to spend more money on those.

## Flower promotion

Polish florists underline the need for further flower promotion among clients. They want to actively "fight" against the negative trend of giving something else instead of flowers. Also in this segment branch organizations are seen as those which should initiate and run flower supporting campaigns. For many florists The Netherlands is a great role model for developing Polish floristry and the whole flower sector. It is strongly visible not only in the voice of the florists, but also in promotional and sales floral activities realized in Poland.

**Polish consumers are definitely open to new flower varieties, new trends, original ideas they see in other countries, on Internet or in print media and they expect to find that at their florists. Luckily both sides : clients and florists are looking in the same direction.**

## SWOT

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Increasing welfare of the society</li> <li>• Clients looking for novelties</li> <li>• Interest in pot plants</li> <li>• Trend for attractive event decorations</li> <li>• Specialized service and professional/ educated florists</li> <li>• Tailor made offers dedicated to clients and not regular market offer</li> <li>• Bigger diversity of flowers</li> <li>• High quality of flowers</li> </ul>	<ul style="list-style-type: none"> <li>• Wholesale markets and wholesalers selling to end clients</li> <li>• Unsatisfactory quality of flowers delivered by importers</li> <li>• Unsatisfying role of trade and branch organizations</li> <li>• Unsatisfactory level of schools and floristic courses for professionals and beginners</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Further specialization and education of florists</li> <li>• Better educated clients</li> <li>• More clients appreciate natural decorations</li> <li>• Increasing role of Social media</li> <li>• E-commerce and online advertisement</li> <li>• Current trend for ecology and nature and healthy plants in interiors</li> <li>• Young generation open to eco trends</li> </ul>	<ul style="list-style-type: none"> <li>• Uneducated florists without a company who are dumping prices to win customer</li> <li>• Grey zone – non registered companies and semi-florists that dump the prices and spoil the market</li> <li>• Low quality flowers from supermarkets for low price</li> <li>• Wholesale Markets and wholesalers open to individual clients</li> <li>• Trend of giving other presents instead of flowers</li> <li>• Improving quality of flowers in supermarkets</li> <li>• Bad policy of the government</li> <li>• Lack of organized promotion activities</li> </ul>

### Colofon:

#### Embassy of the Kingdom of the Netherlands

Department of Agriculture, Nature and Food Quality

Kawalerii 10 00-468 Warschau Poland

tel: 0048 22 559 1269

e-mail: [war-lnv@minbuza.nl](mailto:war-lnv@minbuza.nl)

[www.agroberichtenbuitenland.nl](http://www.agroberichtenbuitenland.nl)