



Taking East African floriculture to the next level

RaboResearch

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Summary

The cultivation of cut flowers in Kenya and other East African countries has flourished since the turn of the century. Today, approximately 100,000 people are directly employed on flower farms in Kenya, with another 60,000 working in flower transport and other supporting activities. Dutch and African-owned businesses operate side by side, strengthening ties between Kenya and the Netherlands. This collaboration set the stage for the Floriculture Africa Executive Forum, an exclusive event organized by Rabobank for industry leaders and held in Amsterdam on November 3, 2025. This article provides an overview of the main highlights.

Here are five key insights from the Floriculture Africa Executive Forum:

- Exports from Kenya to non-European markets are growing rapidly.
- Portfolio diversification beyond roses is accelerating.
- Digital platforms are reducing dependency on intermediaries and streamlining trade.
- Sea freight development is critical for future development despite geopolitical risks.
- Cooperation between Africa and Europe can expand global market potential.

Managing country risk to unlock further industry development

One of the key themes of the Forum was the challenge for entrepreneurs of operating across multiple countries, particularly in East Africa, where access to finance is often constrained by significant country risks. These risks include geopolitical factors such as trade agreements, the financial stability of government budgets (and related tax systems), and internal political conditions – for example, recent unrest in Tanzania (October 2025) and tensions between Ethiopia and Eritrea over Red Sea access. Entrepreneurs carefully weigh these risks when deciding whether to start or exit operations. Banks are equally cautious, closely monitoring political and economic stability. External financing is only available when risk levels are considered acceptable – making effective risk management a critical factor in shaping the future of the East African flower industry.

Improving market access through digital platforms

In the past, growers in East Africa typically relied on Dutch import companies to handle not only trade with the Netherlands but also transactions with other international markets on their behalf. Today, thanks to the expansion of digital platforms such as Floriday, African growers can showcase their products directly to a global pool of buyers, reducing dependency on intermediaries. This shift can also lead to cost savings by allowing growers to specify transaction currencies – whether in US dollars or in euros – upfront. Digitalization is transforming the cut

flower trade. Sales, administration, logistics, and finance are now integrated and simultaneous, breaking free from traditional pathways and unlocking smarter, faster processes.

Strengthening global position through portfolio expansion and bouquet composition in country of origin

Roses remain the dominant cut flower grown in East Africa. However, since the Covid-19 pandemic, other varieties have gained traction. Summer flowers – such as eryngium and solidago – have been cultivated for some time, and in recent years chrysanthemums have become increasingly common.

The question now is whether the assortment can be expanded further. Research conducted in 2022 identified five cut flowers with strong potential.¹ Based on six criteria – transport suitability (by sea and air), climatic suitability, labor availability, market demand, and technical know-how – the cultivation of chrysanthemums, carnations, and cut hydrangeas was assessed as reasonably feasible. Especially chrysanthemums – using varieties comparable to those grown in Colombia – appear to be gaining ground. For eustoma (lisianthus) and gerbera, however, there are still too many barriers to start large-scale production.

To capture the full market, East African growers need to expand their portfolio. This is especially important because about half of global cut flower sales are mixed bouquets. Meeting this demand effectively requires assembling bouquets at the source in Kenya, which calls for a broader assortment of flowers to be grown locally in East Africa. By doing so, added value can be created in the region. In this context, “packed-as-a-service” and portfolio diversification are two sides of the same coin.

Addressing logistical challenges

An important issue for East Africa’s cut flower sector is the transportation of the final product to the market. Most cut flowers are currently shipped via passenger flights or specialized cargo flights to airports in Europe. Recent trials using refrigerated sea freight to Europe for cut flowers (including roses) have shown [promising results](#).

Over the past five years, the transport of cut flowers has faced two major disruptions. First, during the pandemic, air freight became challenging due to fewer available passenger flights and the high costs for specialized air cargo. Then, in 2022, sea freight through the Red Sea was disrupted by attacks on ships, increasing the risks associated with sea transport.

Due to the Red Sea crisis, the development of sea freight is currently paused. Moreover, there are many challenges that need to be addressed and questions that require answers. For instance, which types of cut flowers are suitable for sea transport? Is it possible to ship mixed bouquets? How does stockpiling cut flowers affect price formation? Additionally, how are infection risks financially covered during transport?

Advancing sea freight is crucial for the continued growth of Africa’s cut flower sector. It would provide the industry with multiple transport options, leading to a more stable supply and a more predictable cost structure. For example, chrysanthemums from Colombia have been shipped to Europe by sea for nearly 25 years, demonstrating that sea freight can be an effective method of transporting cut flowers over long distances. This could also create new opportunities for Kenya

¹ KFC & InHolland Applied University, Kansen voor nieuwe gewassen, 2022

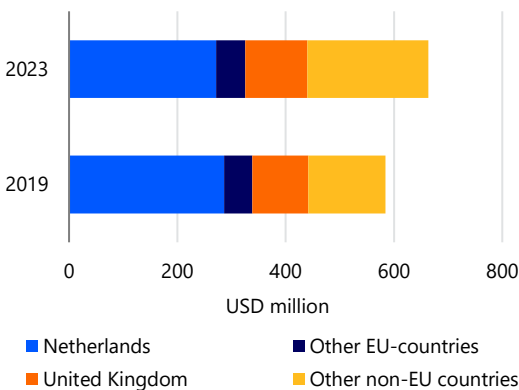
and other countries, especially on routes and to destinations that are not well-served by passenger flights or air cargo.

Driving growth through markets and variety diversification

In recent years, Kenya has succeeded in increasing its exports, particularly to countries outside of Europe (see figure 1). While exports to the Netherlands, other EU countries, and the UK combined were almost the same in 2019 as in 2023, exports to non-EU countries have seen significant growth. Notably, exports to countries on the southern side of the Persian Gulf, such as Qatar, UAE, Kuwait, Bahrain, and Saudi Arabia, now amount to nearly USD 100m.

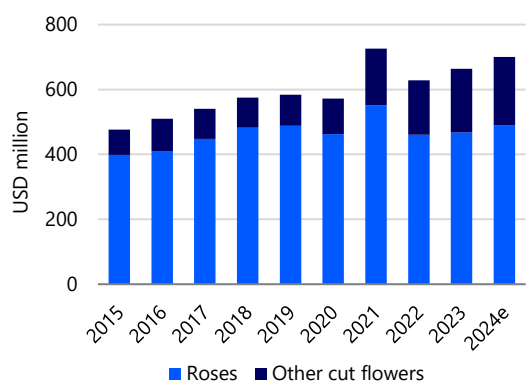
Kenya has also diversified its export portfolio in terms of product types. Since 2019, the export of cut roses has remained fairly stable, ranging between USD 450m and USD 520m. However, the export of other cut flowers has risen sharply since 2021, now exceeding USD 200m (see figure 2). Given the introduction of new crops in 2024 and 2025 and companies planning to invest in other cut flowers, this upward trend is expected to continue.

Figure 1: Kenyan flower exports, 2019 and 2023



Source: UN Comtrade, RaboResearch 2025

Figure 2: Export value Kenyan cut flowers, 2015-2024e



Source: UN Comtrade, RaboResearch 2025

Ensuring sustainability compliance to secure market access

During the panel discussion at the forum, the requirements for the Floriculture Sustainability Initiative (FSI) were also discussed. New companies that want to start a business should comply with these requirements from the outset. Adhering to European regulations is essential for African floriculture, as it ensures access to European markets and at the same time sets a standard that can open doors to new markets.

In the main sales markets, there is growing attention for the sustainability aspects of cut flower cultivation and trade. Consumer views on sustainability differ across markets. For example, US research showed that consumers there were mainly willing to pay a premium for cut flowers if they were locally grown and if waste was composted. In Europe, the focus is on environmental aspects such as the carbon footprint, the use and emission of chemical crop protection products, water usage, and packaging, plastics, and waste. In Kenya and countries with similar social and economic conditions, sustainability is commonly considered to encompass strong social dimensions, such as fair remuneration (living wage), workers' rights, and equal rights for men and women. This is why certification schemes like those of the Kenya Flower Council (KFC) or Milieu Programma Sierteelt (MPS) are important, as they ensure that these [social and environmental conditions are met](#).

Conclusion and key takeaways

By collaborating, there are opportunities to expand the global flower market and provide value to growers in East Africa and Europe alike. This collaboration may include introducing new flower varieties to increase diversity. It can also involve adopting propagation and cultivation techniques often cited as reducing the environmental footprint, and leveraging East Africa's labor potential for labor-intensive tasks, which are becoming increasingly difficult to carry out in, for instance, the Netherlands.

Imprint

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A summary of the methodologies used by Rabobank can be found on our [website](#).

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