



FLOWERS FROM THE FARM

ECONOMIC DATA REPORT 2024



WHAT WE LEARNED ABOUT FFTF MEMBERS

- The members who responded are almost all growers (97%) with a substantial majority (76%) also involved in floristry. 3% are florists or flower schools.
- Specialist growers, growing a single or very limited range of crops, are in a small minority (7% of total growers).
- The majority of respondents are very small businesses. 45% of respondents to the revenue question reported revenues of £10,000 or below, while 66% of respondents reported revenues below the UK living wage annual salary of £24,570.
- 6% of respondents are generating revenues in excess of £75,000. The percentage has grown relative to previous survey results but this could be affected by selection bias.
- Of the staff working in member businesses, 57% are paid and the remainder, including many business owners, are not paid (yet).
- Land under cultivation is heavily concentrated within the larger businesses with 16% of respondents accounting for 80% of total land under cultivation.
- Stems grown and sold are also concentrated within the larger businesses, with 30% of respondents producing 80% of total stem count.
- There are wide price variations across respondents. The average wholesale stem price is 81 pence and regional prices vary by about 20%, however there is a much greater price variation between lower and upper quartiles of 53%.
- Given the low response rate it is not possible to draw conclusions for the membership as a whole, or to produce statistically reliable estimates of the wholesale value of stems sold for submitting to DEFRA, but we have calculated a range of possible values at the end of this report.

RESPONSE AND COMPLETION RATE FOR FFTF MEMBERS

The response rate for FftF members was 269, or 27% of the membership, below that of other recent FftF surveys. Of those who responded, 80% answered the questions on revenues and area farmed and 70% answered the questions on staff. The questions with the fewest answers were those on wholesale pricing (55%) and stem count (41%).

Reasons for the low response rate includes some or all of the following factors: members not engaging with FftF communications; lack of clarity regarding how the information will be used; privacy or commercial sensitivity; need for better data recording; poor timing of survey; members more focused on other performance and success metrics which this survey did not explore.



NON-MEMBER BUSINESSES

56 non-FftF businesses responded. We do not know how representative these businesses are of the wider sector however, on average, these businesses reported higher revenues and stem count per hectare than the average FftF member who responded, but lower area under cultivation and weighted average stem price. The purpose of including non-member businesses in the data survey is to gain a better understanding of a larger portion of the UK cut flower grower sector, including farm size, pricing and stems per hectare.

MISSION OF THE ECONOMIC TASK AND FINISH GROUP

Flowers from the Farm aims to help members build financially sustainable businesses and an important way to measure progress is through regular record keeping. Accurate data on UK flower farm production is essential so that we know the scale of our sector when speaking to stakeholders to gain support and recognition for our members. The Board also wants to submit accurate data to DEFRA, so that our members' production is properly represented within these statistics.

WHO TOOK PART IN THE SURVEY?

The survey was sent to all members of Flowers from the Farm and other British outdoor growers were invited to contribute via a social media campaign. The aim was to capture data for as large a portion of the British cut flower sector as possible, however it was acknowledged that the mid-April timing was not ideal as it is a busy month for growers.

RESPONSE RATE

FFTF MEMBERS 269

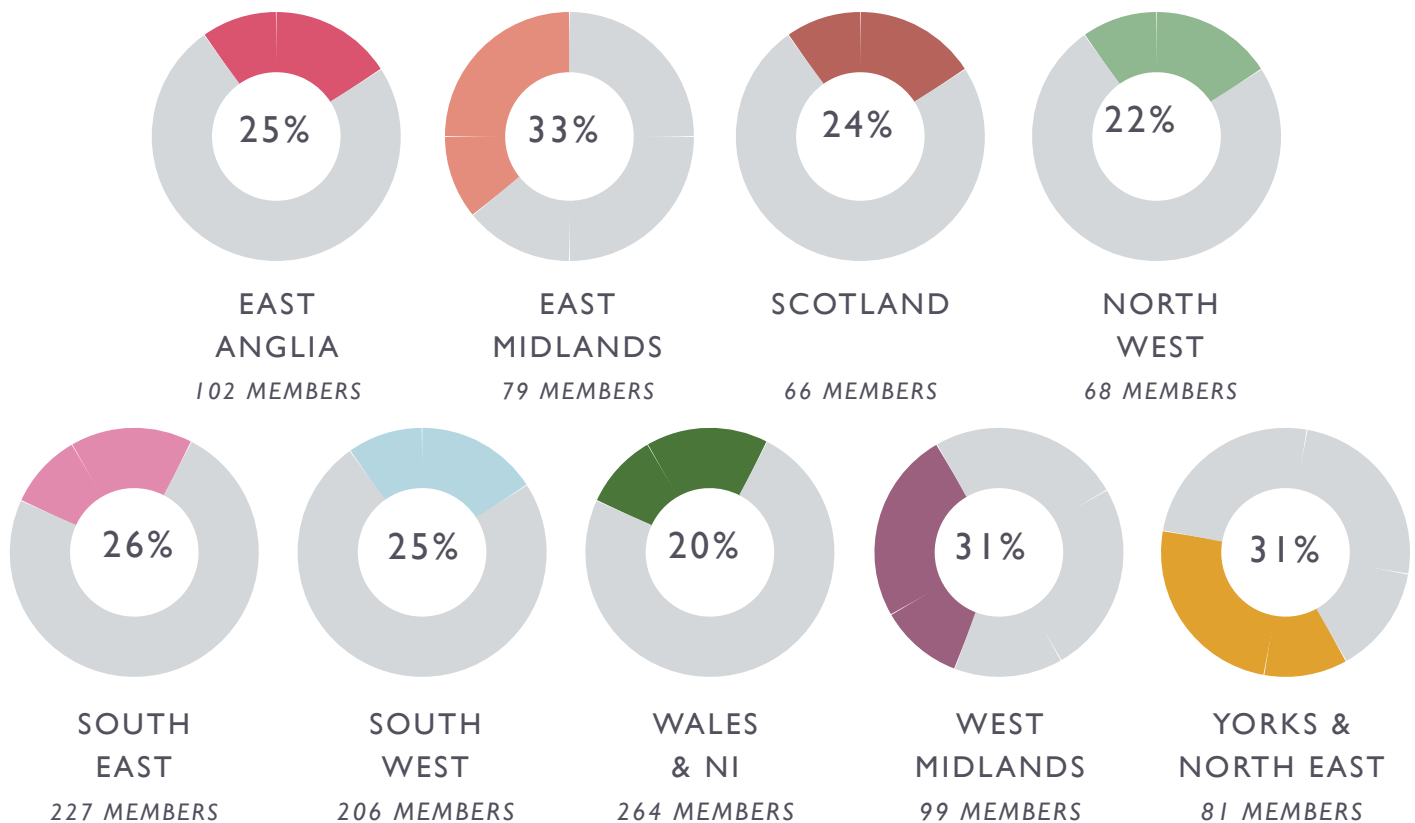
NON FFTF MEMBERS 56

From Flowers from the Farm, 269 members responded and 56 non-member businesses also responded. This compares with 349 member responses for the 2023 FftF 'Shaping the Future' survey and 413 member responses for the 2022 survey.



PERCENTAGE OF PARTICIPATION BY FFTF REGIONS

The member responses were spread across the different FftF regions with every region having a response rate between 20% and 33%.



DATA COMPLETENESS

Of the 269 responses provided by FftF members, around half were substantially complete, containing responses to the questions on revenues, total staff, paid staff, area under cultivation, stem count, and either average wholesale stem price or wholesale bucket prices, while the remainder contained answers to some but not all of these questions.

Of the responses provided by non-members, 20% were substantially complete, as above.

The completion rate was higher for larger businesses: 49% of businesses with revenues above £40,000 completed the survey, compared with 42% for businesses with revenues of £40,000 and below.

Question 9 on number of stems grown and sold had the second lowest response rate with 126 answers (109 members, 17 non-members).

Question 10 on weighted average stem price had the lowest response rate with 101 answers (89 members, 12 non-members).

FLOWERS FROM THE FARM MEMBER DATA

The first section of this report refers to Flowers from the Farm members only.



WHAT FLOWERS FROM THE FARM MEMBERS DO IN THEIR BUSINESS

- 269 FftF members completed this part of the survey.
- 20% are growers only, 3% are florists or floristry schools only while 76% do some combination of growing and floristry.
- 97% of all respondents are growers, with 90% growing a wide variety of crops and foliage and 7% growing a single or very narrow range of crops.
- Of the growers, 30% grow flowers only (no foliage) while 1% grow foliage only.
- Workshops are the most popular 'add-on' services, followed by selling dried flowers and cut your own/farm visits.
- 193 FftF members reported total revenues of £5,790,894 for 2024. Average revenues were £30,005.
- The largest 33% of businesses (by revenue) accounted for 80% of total revenues.
- Businesses with revenues above £40,000 conduct a wider range of activities on average than businesses with revenues below £40,000, suggesting that more value added products such as floristry and workshops are associated with higher revenues (Figure 1).'



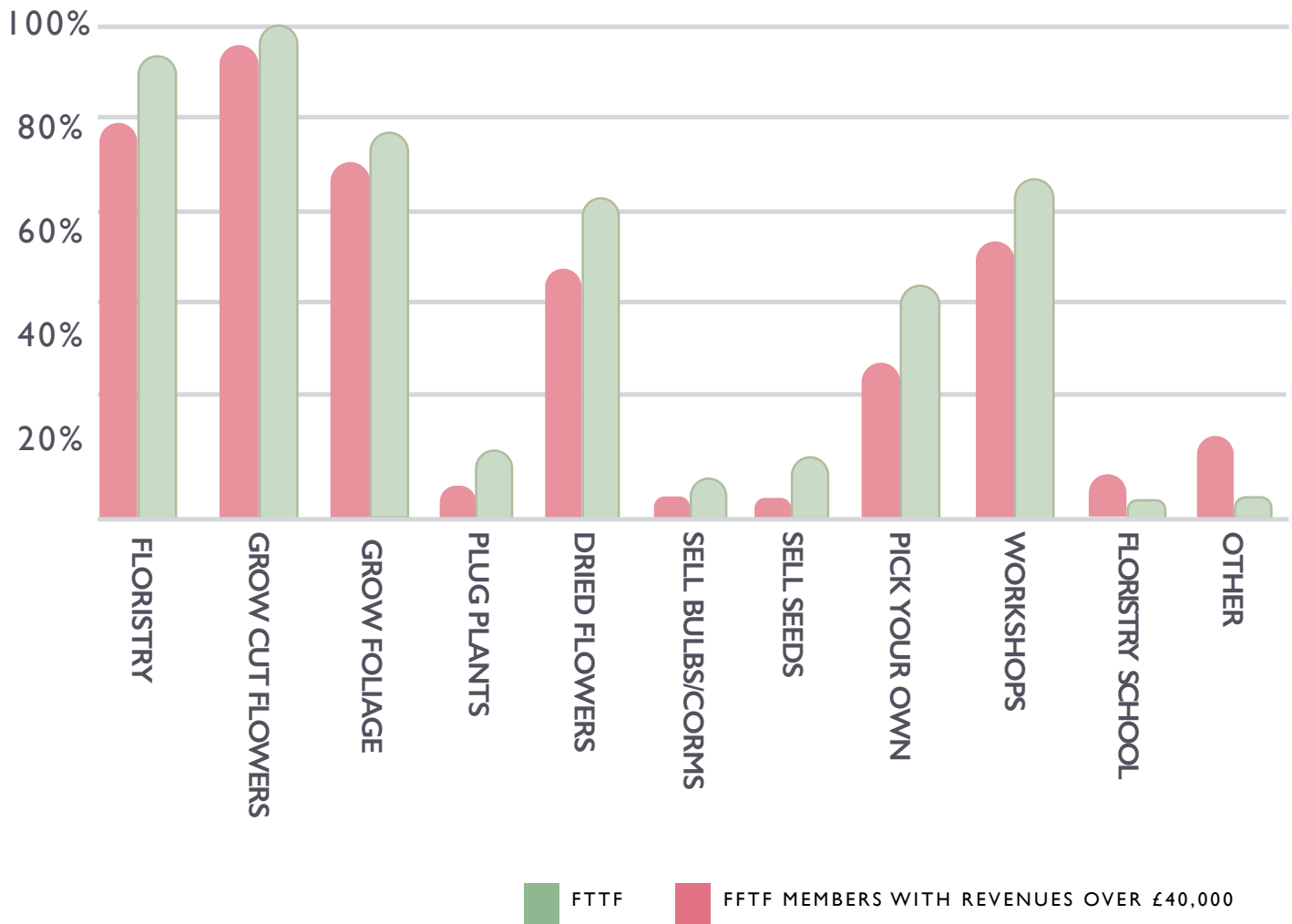
BUSINESS ACTIVITIES

FIGURE 1

SAMPLE SIZE OF FTTF 269

FTTF MEMBERS WITH REVENUE OVER

£40,000



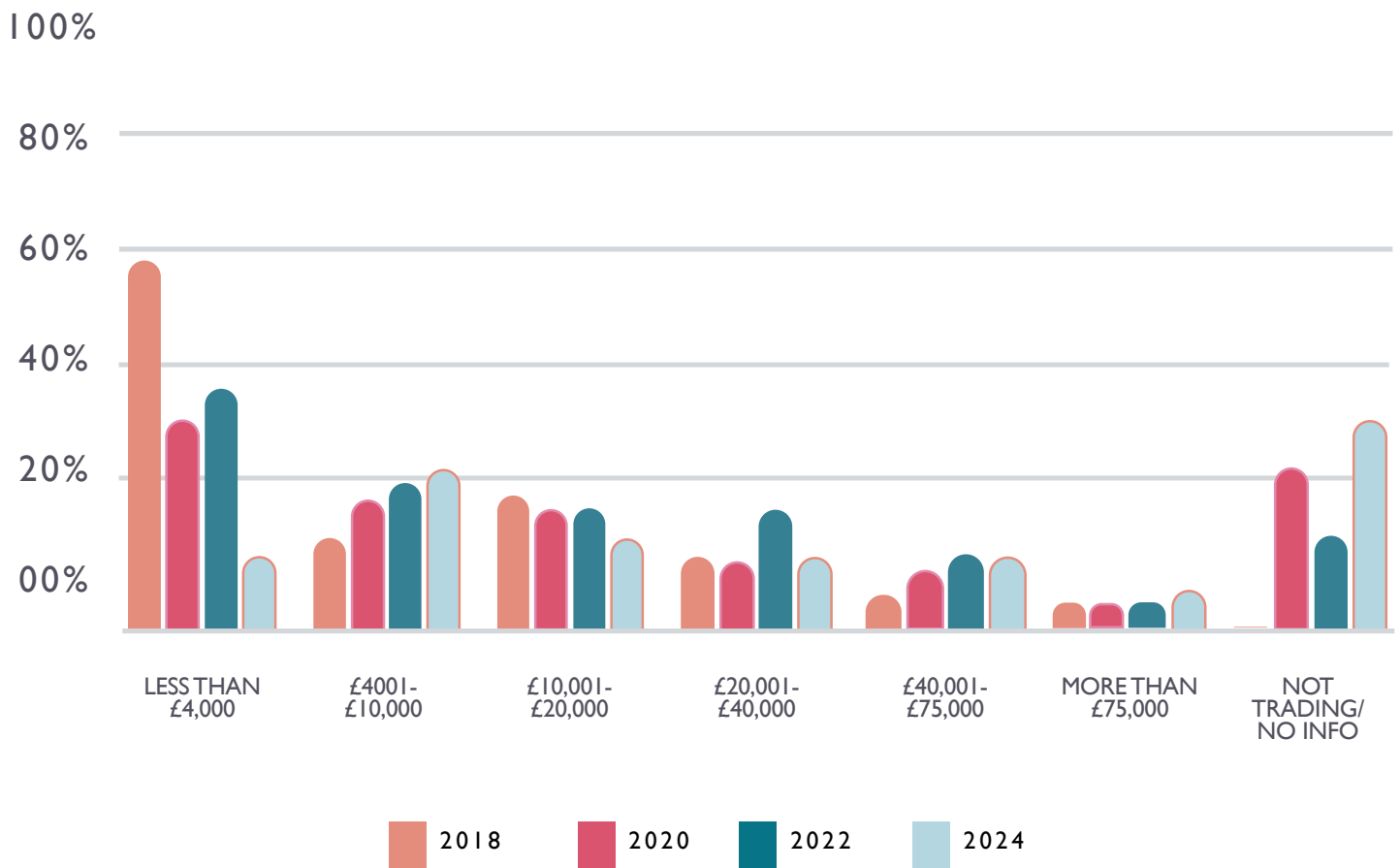
The percentage of businesses with revenues over £40,000, has increased to 16% in 2024 from 7% in 2022 (Figure 2).

THE PERCENTAGE OF BRITISH FLOWERS USED BY FLORIST MEMBERS

- The members who do floristry responded that on average, 91.8% of the flowers they use originated from the UK.
- Of the members who said they use 75% or less British flowers, all except one were florist-growers



TOTAL REVENUES



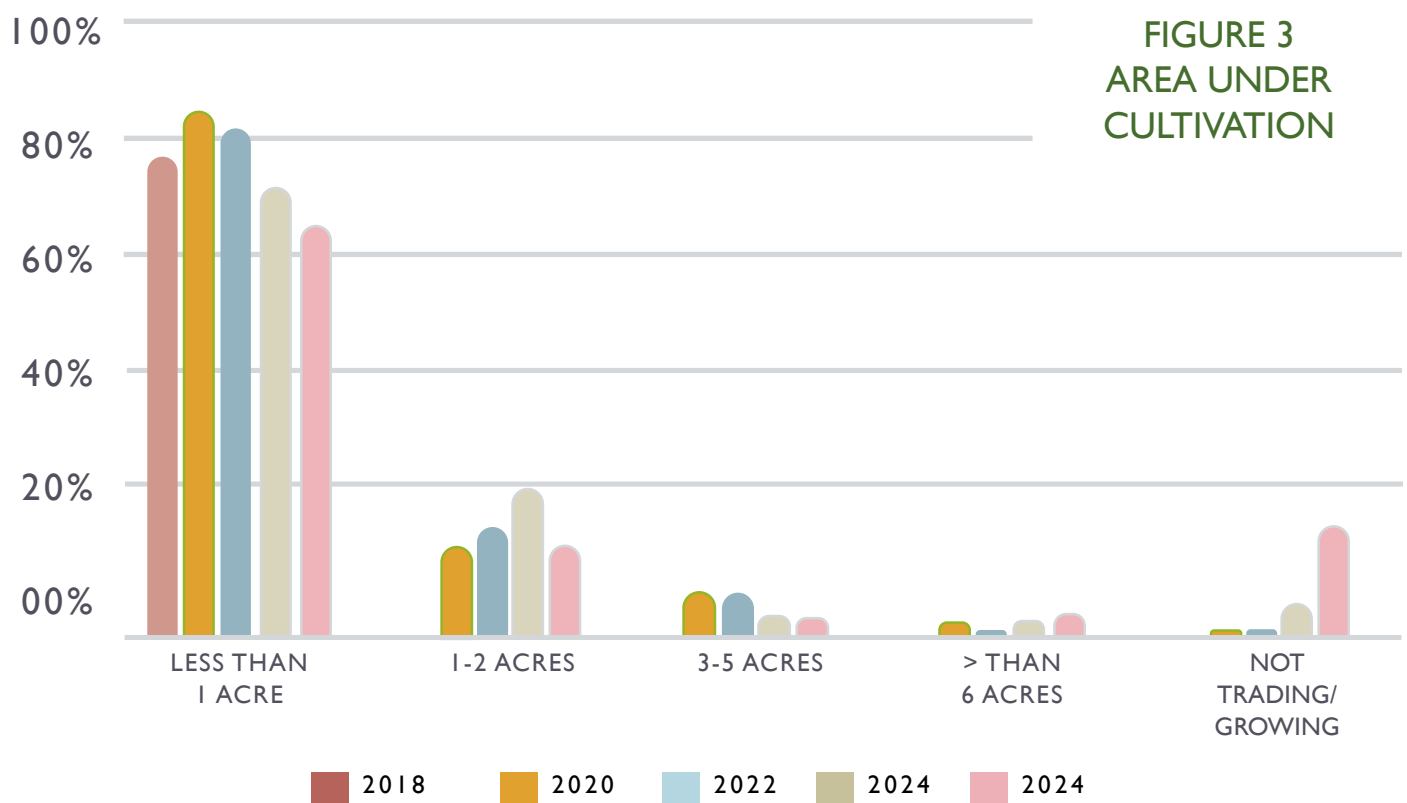
PEOPLE WORKING IN FLOWERS FROM THE FARM MEMBER BUSINESSES

- Based on responses from 216 businesses, a total of 316 full time equivalent people work in FftF member businesses, an average of 1.5 FTEs per business.
- Of the total 316 FTEs, 180 (57%) are paid and 136 (43%) are unpaid. Many business owners are not yet paying themselves a salary and we should track the gap between paid and unpaid labour over time.
- The largest 34% of businesses account for 80% of total FTEs.
- For businesses with revenues over £40,000, the average number of FTEs was 2.2, of which 2.0 (92%) were paid (sample size of 41).



THE SIZE OF FLOWERS FROM THE FARM MEMBER FARMS

- The 226 members who responded to this question farm a total of 122 hectares (302 acres).
- The average farm size was 0.54 hectares (1.3 acres) with 9% farming on one hectare (2.5 acres) or more.
- 80% of the total area under cultivation was accounted for by 16% of farms and of those, only three farms grow a single or limited range of crops. 40% are 'pure' growers who do not do floristry.
- Compared with previous FftF surveys which asked participants to answer in acre bands, e.g. 1-2 acres, 3-5 acres rather than as an absolute number, the proportion of small and medium-sized farms has not changed significantly over time (Figure 3).



- The total stems grown and sold by 109 FftF members was 2.3 million, or 21,000 on average per respondent.
- 30% of businesses accounted for 80% of stems grown and sold.
- If we rank all farms by number of stems grown and sold, stem count ranged from 64,000 on average for the upper quartile of respondents to 1,600 on average for the lower quartile.



WHAT DOES THE DATA TELL US ABOUT STEMS PER HECTARE?

- For the 109 FftF farms which reported total stem count, the average number of stems grown and sold is 67,000 per hectare, or 27,000 stems per acre.*
- If we rank all farms by stems per hectare, there is a very broad range, from 334,000 stems per hectare (135,000 per acre) on average for the upper quartile to 16,000 stems per hectare (6,000 per acre) on average for the lower quartile.*
- If we rank all farms by area under cultivation, the results suggest that smaller plots produce more stems on average: the lower quartile of farms grow and sell 184,000 stems per hectare on average, compared to the upper quartile producing stems per hectare of 56,000 on average.*
- The accuracy of these data points is limited because it depends on how members have measured their area under cultivation. We asked everyone to include their overall growing area, including paths, hedgerows, polytunnels and sheds, however we suspect some responses have measured growing beds only. Area can be measured using Magic Maps (<https://magic.defra.gov.uk>) or Google Maps.

**Footnote: in calculating average stems per hectare, we have excluded the five most productive and five least productive farms as 'outliers' because their results are potentially erroneous (e.g. the lowest is 13 stems per hectare and the highest is 2 million stems per hectare). If all results are included, the average stem count per hectare is 31,000.*

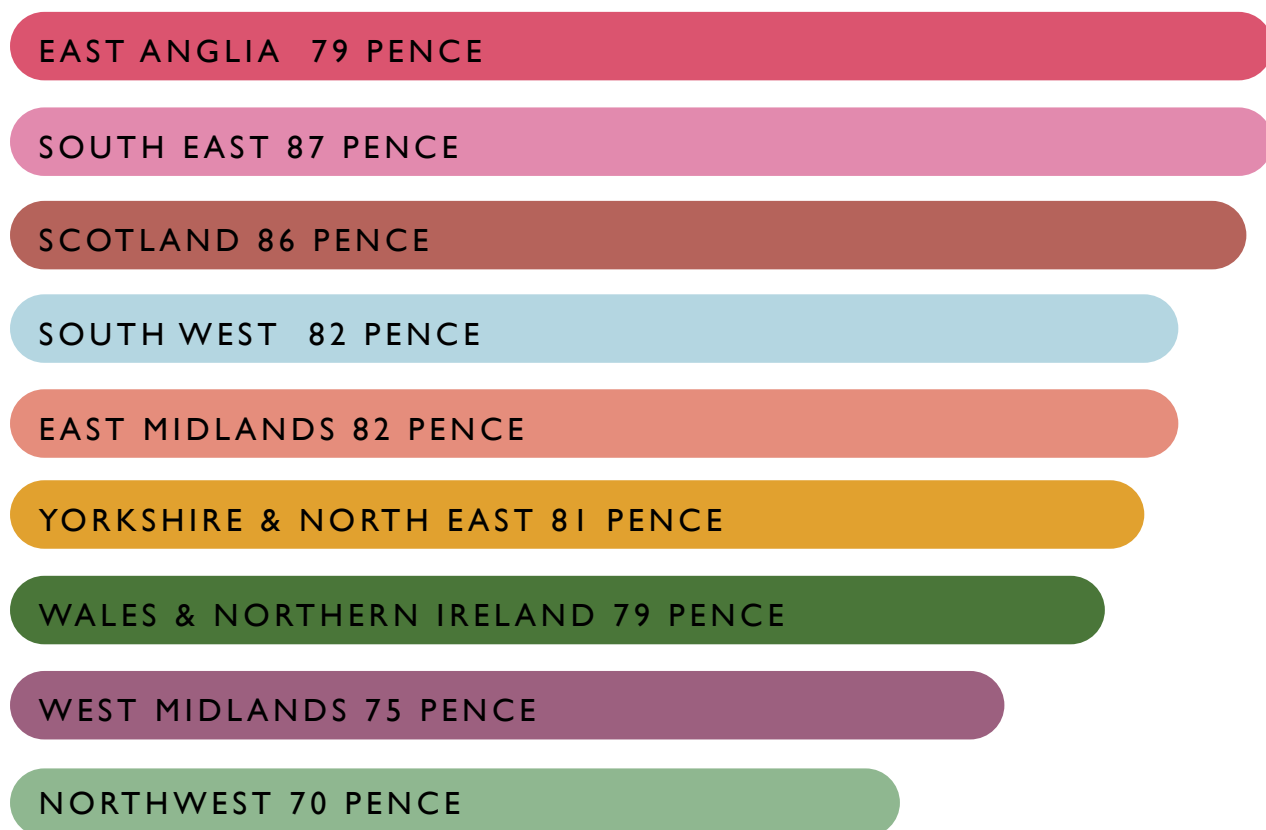
WHAT DOES THE DATA TELL US ABOUT WHOLESALE PRICING AMONGST FTF MEMBERS?

- The weighted average wholesale stem price is 81 pence (sample size 148).
- If we consider only the businesses with revenues over £40,000, the weighted average wholesale stem price is 97 pence. By contrast, for businesses with revenues of £10,000 or below, the weighted average wholesale stem price is 81 pence.
- There is no impact on the weighted average wholesale stem price from the members who grow a single, or very limited variety of, crops; without these 7 growers, the weighted average stem price remains 81 pence.
- There is a wide variation in members' wholesale pricing: when ranked from highest to lowest stem price, the average stem price for the upper quartile it was 120 pence, compared with 56 pence for the lower quartile.



FFTF REGIONS WEIGHTED AVERAGE WHOLESALE PRICE IN PENCE

FIGURE 4



FLOWERS FROM THE FARM OVERALL AVERAGE WEIGHTED STEM PRICE IS 81 PENCE

HOW DO MEMBERS SELL THEIR STEMS?

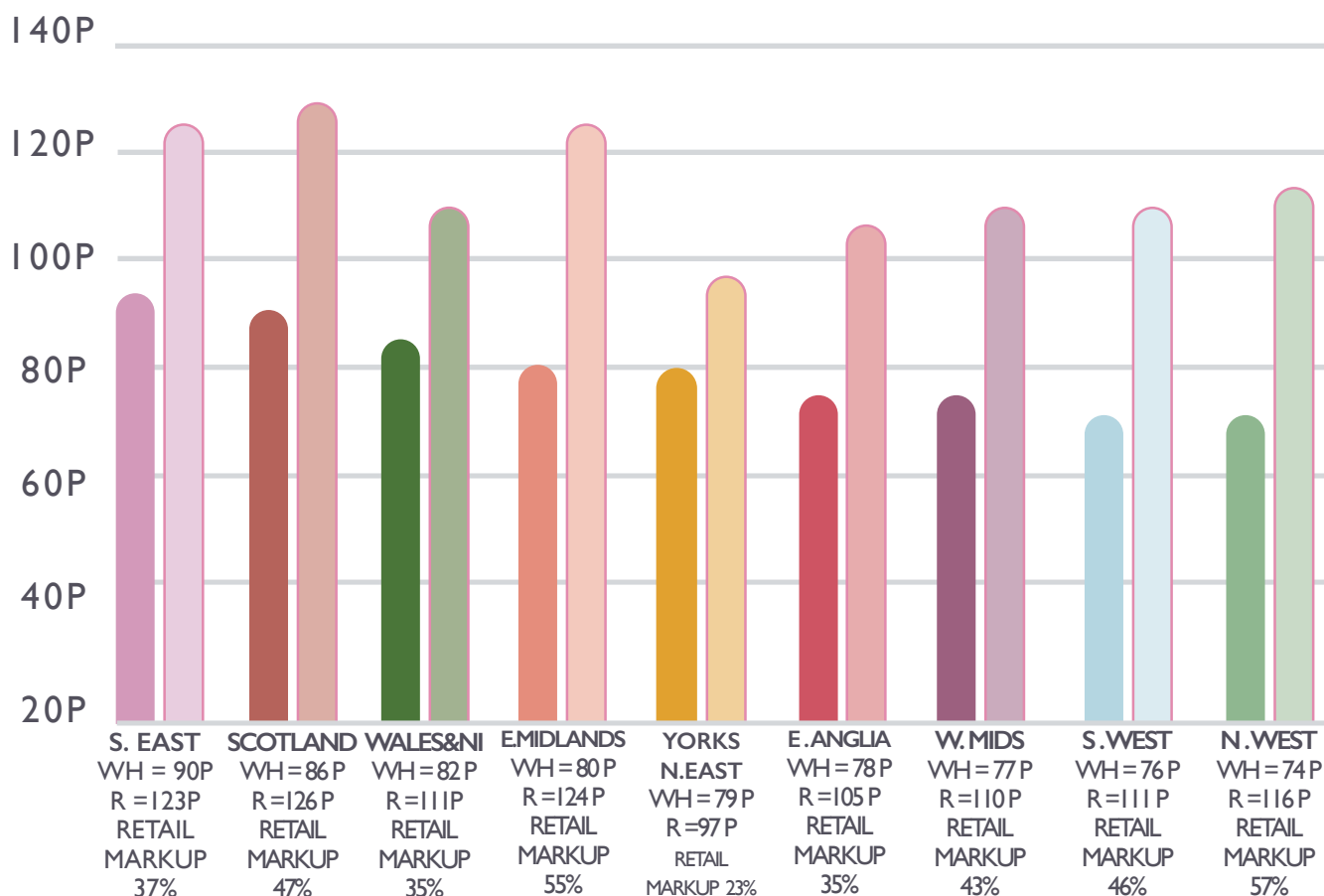
- 62% of respondents sell to both retail and wholesale customers (sample size 269) with 29% selling retail only and 9% selling wholesale only.
- For businesses with revenues above £40,000, the split is similar with 24% selling retail only and 10% wholesale only. 66% of these businesses do both retail and wholesale.
- Selling in mixed buckets is popular among members, with 43% of respondents selling wholesale buckets and 51% selling retail buckets.

WHAT DID WE LEARN ABOUT BUCKET PRICING?

- For wholesale mixed buckets, the average price was £45 for an average 55 stems (81 pence per stem), based on 124 respondents.
- The average wholesale bucket price ranged from 110p per stem for the upper quartile to 57p per stem for the lower quartile.
- For retail mixed buckets, the average price was £62 for an average 54 stems (114 pence per stem), based on 162 respondents.
- The average retail bucket price ranged from 159p per stem for the upper quartile to 78p per stem for the lower quartile.
- Regional price variations of up to 18% (high-low price) for wholesale buckets and 23% for retail buckets were recorded (Figure 5).
- The average retail bucket mark up was 43% compared to wholesale buckets.

MIXED BUCKET AVERAGE PRICE PER STEM IN PENCE BY FFTF REGION

FIGURE 5





ESTIMATING WHOLESALE VALUE OF STEMS GROWN AND SOLD

DEFRA release UK horticulture statistics in June each year. The farm gate value of UK produced flowers and bulbs was £179 million in 2023.

Given the low response rate to our 2024 data survey, it is unreliable to use this data for estimating the value of FftF members production. As a result, we have used three data points (lower quartile, mean and upper quartile) to estimate a range for the value of production for the 226 respondents that provided area under cultivation.

If we multiply total area under cultivation of 122 hectares by the average stem count per hectare and average wholesale stem price, this would imply wholesale value of stems grown and sold for 226 members ranging from £1.1 million to £49.1 million, with a mean value of £6.7 million (Figure X).

For avoidance of doubt, we will not be submitting any data to DEFRA for 2024 but believe this data is useful as a base case and for future comparisons.

We hope to gather a statistically significant data set for the 2025 season which will provide a more accurate estimate of the wholesale value of flower production for FftF members.

FIGURE 6

	AREA UNDER CULTIVATION HECTARES	AVERAGE STEM COUNT PER HECTARE	AVERAGE WHOLESALE STEM PRICE IN PENCE	WHOLESALE VALUE OF STEMS GROWN&SOLD £ MILLION
	A	B	C	AXBXC
LOWER QUARTILE STEM COUNT&PRICE	122.4	16	56	1.1
AVERAGE(MEAN)	122.4	67	81	6.7
UPPER QUARTILE STEM COUNT & PRICE	122.4	334	120	49.1
NUMBER OF RESPONDENTS	226	109	149	



HOW DO NON-MEMBERS COMPARE?

- 84% of non-member respondents are growers, 16% are florists who do not grow and 57% do both.
- Five businesses reported revenues of £40,000 or more. All five do floristry and three are growers of flowers and foliage.
- Of the growers, only 9 businesses (18%) grow a single or very narrow range of crops, compared to 19 businesses (7%) of FftF members. None of these 9 businesses reported revenues of £40,000 or more.
- The average revenue per respondent for non-members was £41,000 compared with £30,000 for FftF members.

REVENUES

	FFTF MEMBERS	NON FFTF MEMBERS	TOTAL
TOTAL REVENUES	£5,790,894	£1,304,570	£7,095,464
NUMBER OF RESPONDENTS	193	32	225
TOTAL REVENUE PER RESPONDENT	£30,005	£40,7687	£31,535

EMPLOYMENT

The percentage of full time equivalent (FTE) staff who are paid increases when non-members are included.

	FFTF MEMBERS	NON FFTF MEMBERS	TOTAL
TOTAL FULL TIME EQUIVALENT STAFF	316	44	360
NUMBER OF RESPONDENTS	216	33	249
FTE PER RESPONDENT	1.5	1.3	1.4
PAID FTE STAFF	180	27	207
PROPORTION OF FTE'S WHO ARE PAID	57%	61%	58%



CULTIVATION AREA

Average area under cultivation falls slightly due to smaller average farm sizes for non-member respondents.

	FFTF MEMBERS	NON FFTF MEMBERS	TOTAL
AREA UNDER CULTIVATION	122.1	9.8	131.9
NUMBER OF RESPONDENTS	226	43	269
HECTARES PER RESPONDENT	0.54	0.23	0.49
ACRES PER RESPONDENT	1.33	0.56	1.21

STEMS GROWN

Non-member farms reported a higher number of stems grown and sold per hectare, on average, compared with FttF members who responded

	FFTF MEMBERS	NON FFTF MEMBERS	TOTAL
NUMBER OF STEMS GROWN & SOLD	2,291,801	388,050	2,679,851
NUMBER OF RESPONDENTS	109	17	126
STEMS GROWN & SOLD PER HECTARE	67,000	120,000	72,000

STEM PRICE

The weighted average wholesale stem price falls when non-members are included

	FFTF MEMBERS	NON FFTF MEMBERS	TOTAL
WEIGHTED AVERAGE WHOLESALE STEM PRICE (PENCE)	£0.83	£0.66	£0.81
NUMBER OF RESPONDENTS	148	12	158



TOTALS

- Finally, the potential for selling more British flowers appears greater with non-members than with members as non-member florists responded that on average 75% of the flowers they use originated in the UK.
- Of the non-members who said that they use 75% or less British flowers, over half were florists who do not grow and these businesses together reported revenues of £1.1 million.

	FFTF MEMBERS	NON FFTF MEMBERS
PROPORTION OF WHOLESALE FLOWERS ORIGINATING FROM THE UK	91.8%	74.6%
NUMBER OF RESPONDENTS	164	30



ECONOMIC DATA REPORT 2024

Thanks to the Economic task and finish group:

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