



FLOWERS FROM THE FARM

Supporting British Flower Farmers

FLOWERS FROM THE FARM ECONOMIC DATA REPORT 2025

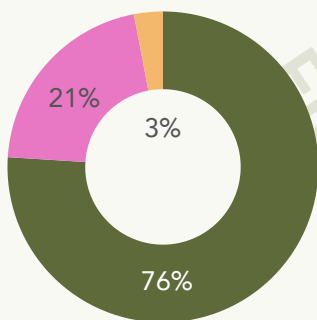


CONFIDENTIAL FOR THE USE OF FLOWERS FROM THE FARM MEMBERS ONLY

WHAT WE LEARNED ABOUT FFTF MEMBERS

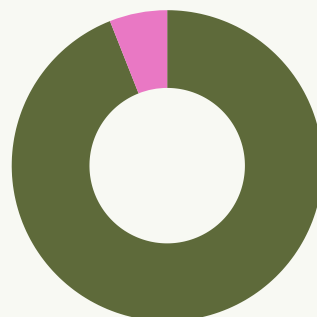
Business types

- Grower & florist
- Grower
- Florist or school



Crops grown

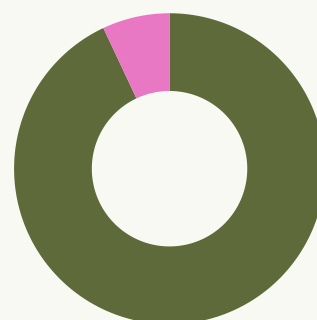
- Single / limited range



- Wide range

Florist members use

- Imported flowers



- British flowers

Revenues	<p>Average revenues were £33,600 in 2025, 12% higher than in 2024 (£30,000). Most respondents are very small businesses: 64% reported revenues below the UK living wage annual salary of £24,800. This year 9% of respondents reported revenues in excess of £75,000 (2024: 6%, 2023: 2%).</p>
People	<p>The number of people working in member businesses has increased: full time equivalents (FTEs) increased to 1.8 per business in 2025 from 1.4 in 2024; the proportion of paid staff was 63% in 2025 (2024: 56%).</p>
Land	<p>Average plot size was 0.40 hectares (1.0 acres), compared with 0.38 hectares (0.9 acres) in 2024. 7% are growing on one hectare or more.</p>
Stem count	<p>The total number of stems grown and sold by 108 members was 3.5 million (2024: 2.3 million). Average stems per grower were 32,500, compared with 21,000 in 2024.</p>
Yield	<p>For the 104 members who reported stem count and area under cultivation, average stems per hectare was 43,500 in 2025 (2024: 30,700).</p>
Pricing	<p>The weighted average wholesale stem price was 82 pence in 2025, a 1% increase compared to 81 pence in 2024, and below CPI inflation of 3.4% in 2025. Wholesale and retail bucket prices have increased overall but the retail mark up has narrowed.</p>

Estimating wholesale production

- To estimate production, average stems of 43,500 per hectare (104 respondents) can be multiplied by total area under cultivation of 112 hectares (for 190 respondents) to give 4.9 million stems*.
- The average wholesale stem price of 82 pence values these stems at £4.0 million* (for 190 respondents).
- If these 190 members are representative of all grower members of Flowers from the Farm, **our best estimate of the total wholesale value of stems grown by our organisation is £19.9 million***.

* refer to page 12 for a list of data limitations which affect the accuracy of these estimates

THE PURPOSE OF THIS SURVEY

Flowers from the Farm's 2026 strategy is defined by the three pillars :

1. Grow more quality flowers,
2. Sell more quality flowers, and
3. Improve environmental and financial sustainability, both of member flower farms and Flowers from the Farm as a trade association.

Accurate data on UK flower farm production is essential so that we know the scale of our sector when speaking to the media, government, academics and potential customers, to gain support and recognition for our members.

As a result of this 2025 survey, the Board has been able to submit data to Defra on wholesale value of stems grown for 190 members of £4.0 million*, however we need more member data to be able to accurately estimate the true scale of our organisation.

WHO TOOK PART IN THIS SURVEY?

The survey was sent to all members of Flowers from the Farm via email newsletter, the member Facebook forum and reminders were sent via email, Facebook, the Regional Co-ordinators (e.g. WhatsApp groups), the EDS Task & Finish group and Instagram. We did not survey non-members this year.

Of the 2025 respondents, 41% also completed the 2024 survey, so the data is not directly comparable with 2024 data. However, consistency of average revenues and land under cultivation year-on-year suggests the 2025 respondents were of a similar scale to the 2024 respondents.

RESPONSE RATE

For the 2025 growing season 205 members responded, or 20% of the membership. This compares with 269 responses for the 2024 economic data survey, 349 responses for the 2023 'Shaping the Future' survey and 413 responses for the 2022 member survey.

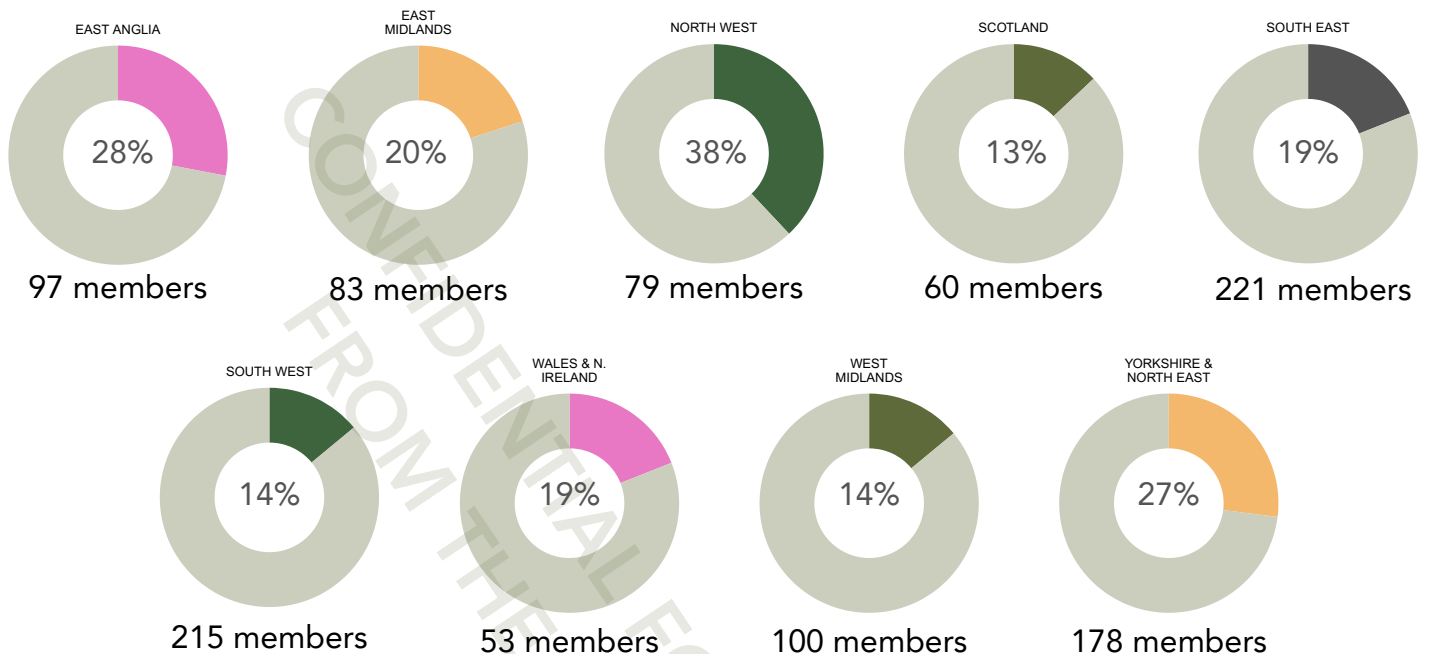
The member responses were spread across the different FftF regions with the North West achieving the highest response rate and Scotland the lowest.

Reasons for the low number of responses overall are likely to include the following; wherever possible these will be addressed for 2026:

- incorrect survey link being sent round initially meaning responses not recorded
- florist members unable to skip the questions for growers (though incomplete responses were still recorded)
- privacy or commercial sensitivity, especially surrounding revenues
- need for better data recording
- members not engaging with FftF communications
- lack of clarity regarding how the survey results will be used
- members focused on other success metrics not covered by this survey and/or not wishing to record data

* refer to page 12 for a list of data limitations which affect the accuracy of this estimate.

PERCENTAGE RESPONSE RATE BY FFTF REGION



Responses were spread across all FftF regions. Every region had a response rate of at least 14%. The member numbers in the diagram above refer to total members (not respondents) per region.

COMPLETION RATE

We ask all members to participate in the survey, even if they are not yet trading or do not have the information to be able to answer some survey questions.

Of the total 205 responses, 15 members replied that they are not yet trading.

Of the remaining responses, over half were substantially complete and the completion rate was better than last year for all questions. The improved completion rate overall suggests that record keeping is improving, though the actual number of responses was still below that of last year.

Completion rate by question	2025	2024
1. Which of the following business activities did you undertake in 2025?	100%	100%
2. Total revenue generated by your business from the activities in Q1?	81%	80%
3. How many people worked in your business, paid or unpaid, including yourself?	85%	70%
4. How many of these people were paid?	76%	61%
5. If you are a florist, what % of flowers used originated from the UK?	93%	80%

Completion rate by question (cont.)	2025	2024
6. Are you a grower of cut flowers and/or foliage?	100%	100%
7. What size was your growing area?	93%	80%
8. How did you sell your stems?	85%	70%
9. How many stems did you grow and sell?	53%	41%
10. What was your weighted average stem price?	70%	55%
11. If you sold WHOLESALE mixed buckets, how much did you charge for a bucket and how many stems were in each bucket?	56%	46%
12. If you sold RETAIL mixed buckets, how much did you charge for a bucket and how many stems were in each bucket?	67%	61%
13. In which Flowers from the Farm region are you registered?	98%	98%
14. How many years have you been in business?	98%	n/a

RESPONDENTS ARE PRIMARILY GROWER-FLORISTS

- Of the total respondents, 97% are growers of cut flowers and/or foliage, 22% are growers only (no floristry), 3% are florists, floristry schools or horticulture retailers but do not grow, while 75% do some combination of growing and floristry. These percentages are consistent with 2024.
- Of those who grow, 93% cultivate a wide variety of crops while 7% specialise in growing a single or narrow range of crops.
- Within the growers, 30% grow flowers only (no foliage) while 2% grow foliage only.

BUSINESS ACTIVITIES

- Workshops are the most popular 'add-on' services, followed by selling dried flowers and cut your own flowers/farm visits.
- Businesses with revenues above £40,000 on average conduct a wider range of activities than the smaller businesses (revenues of £40,000 or below), suggesting that greater value added products such as floristry and workshops are associated with higher revenues (Figure 1).

Figure 1. Business activities

Sample size: 205

* members reporting revenues over £40,000 in 2025

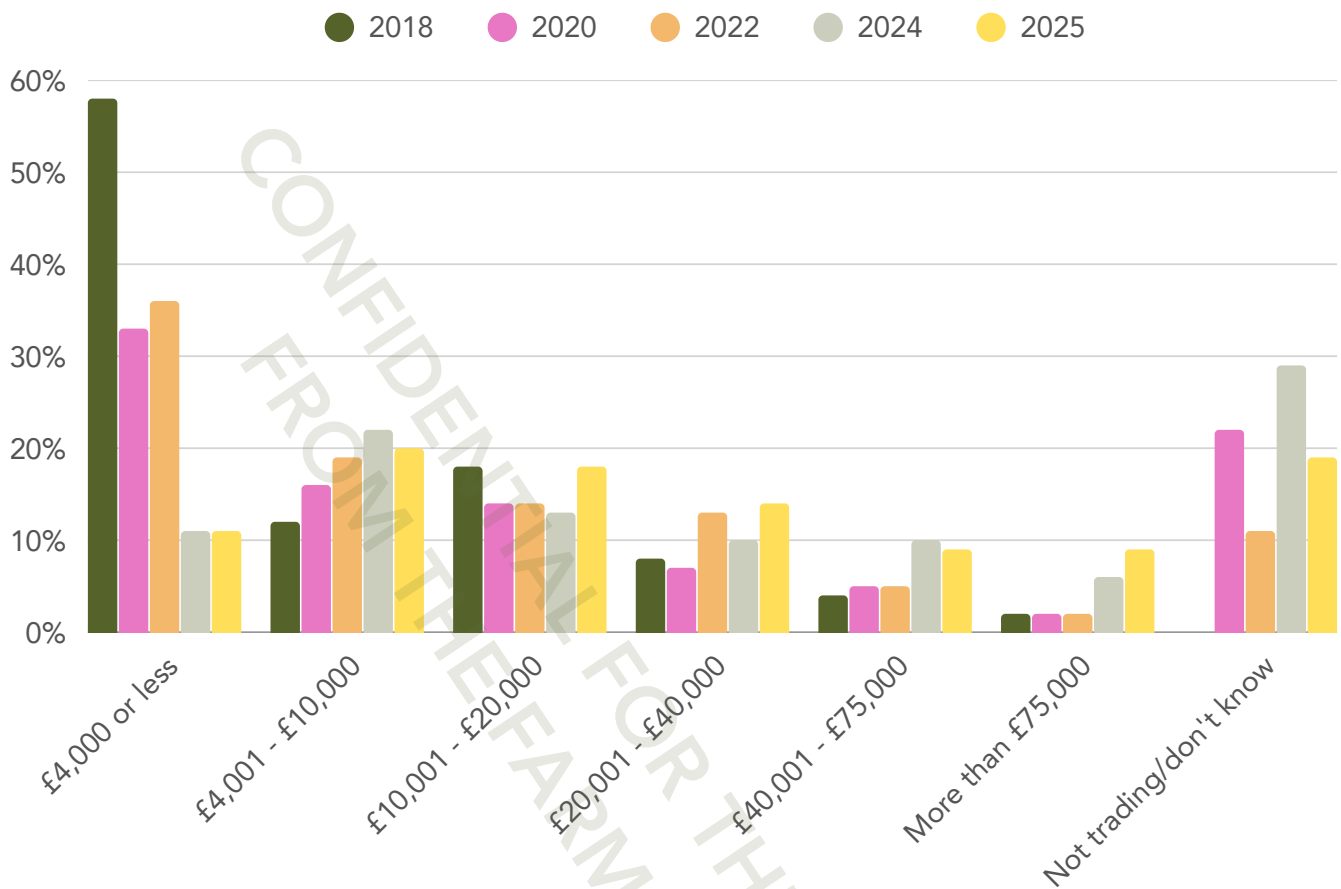


REVENUES HAVE INCREASED ON AVERAGE

- Total revenues of £5,572,767 were reported by 166 members, or an average member revenue of £33,571, 12% higher than 2024 (£30,005).
- The majority of respondents are very small businesses: 64% reported revenues below the UK living wage annual salary of £24,800 (2024: 67%).
- Revenues were concentrated, with the largest 34% of businesses (ranked by revenue) accounting for 80% of total revenues (2024: 33%).
- The percentage of businesses with revenues over £40,000 has increased to 18% in 2025 from 16% in 2024 and 7% in 2022 (Figure 2).

Figure 2. Member revenues over time

Sample size: 166



PEOPLE WORKING IN MEMBER BUSINESSES

- A total of 323 full time equivalent people work in 175 member businesses, an average of 1.8 FTEs per business (2024: 1.4 FTEs).
- Of the total 323 FTEs, 203 (63%) are paid, with the remainder working unpaid. It is positive that the percentage of paid staff has increased to 63% in 2025 from 56% in 2024.
- The largest 50% of businesses (ranked by FTEs) account for 80% of total FTEs, so the concentration has reduced since 2024 (34%).
- Unsurprisingly, larger businesses are more able to pay their staff.
- For the 35 businesses with revenues over £40,000, the average number of FTEs was 2.1 and 87% of them were paid.
- For the 140 businesses with revenues of £40,000 or below, the average number of FTEs was 1.8, of which 56% were paid.

USE OF BRITISH FLOWERS BY FLORIST MEMBERS

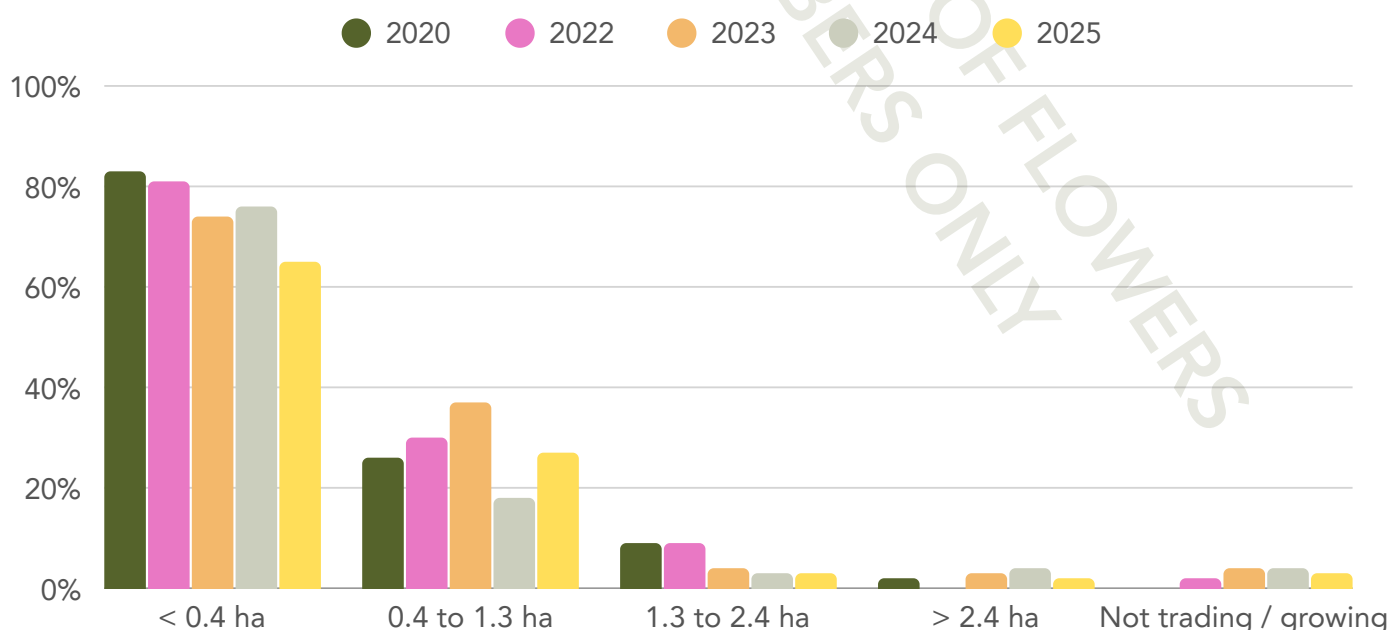
- 130 members who provide floristry services responded that on average, 93% of the flowers they use originated from the UK (2024: 92%).
- Of the 13% who said they use 75% or less British flowers, all except one were florist-growers and together these businesses reported a collective revenue of £1.2 million.

THE SIZE OF MEMBER FARMS

- The 190 members who responded to this question grow flowers and foliage on a total of 112 hectares (276 acres).
- The average plot size was 0.40 hectares (1.0 acre), compared with 0.38 hectares (0.9 acres) in 2024.
- 14 farms (7%) are growing on one hectare (2.5 acres) or more.
- Concentration has reduced with 80% of the total area under cultivation accounted for by 23% of members (2024: 16%). Of those 43 members, only two farms grow a single or limited range of crops and 14 farms are 'pure' growers who do not do floristry.
- By way of reminder, we asked everyone to measure their overall growing area, including beds, paths, hedgerows, polytunnels and sheds. Area can be measured using Magic Maps (<https://magic.defra.gov.uk>) or Google Maps.
- The proportion of small and medium-sized plots has not changed significantly over time (Figure 3).

Figure 3. Land cultivated over time*

Sample size: 190 *hectare size brackets correspond with those of previous surveys



NUMBER OF STEMS GROWN AND SOLD

- The total stems grown and sold by 108 members was 3.5 million, or an average of 32,500 per grower (2024: 21,000).
- Concentration has increased slightly with 80% of total stems grown and sold by 27% of farms (2024: 30%).
- Stem count alone is of limited relevance without taking into account farm size, however.

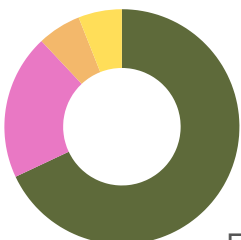
STEMS PER HECTARE

- For the 104 members who reported stem count and area under cultivation, it is possible to calculate yield, or average stems per hectare, of 43,500 (2024: 30,700).
- In acres, this equates to 17,600 stems per acre (2024: 12,400).
- There is a very wide range in yield by member, likely in part due to different methods used in measuring growing area.
- If all 104 farms are ranked by stems per hectare, there is a very broad range, from an average 340,000 stems per hectare (2024: 400,000) for the upper quartile to 4,400 stems per hectare (2024: 2,300) for the lower quartile.
- If all 104 farms are ranked by area under cultivation, the results suggest that smaller plots have a higher yield than larger farms. The lower quartile grow and sell 432,000 stems per hectare on average (2024: 321,000), compared with 31,800 stems per hectare on average for the upper quartile (2024: 19,400).

*Footnote: the 2024 stems per hectare number has been restated from 67,000 previously reported. In 2024 we excluded the five most productive and five least productive farms as 'outliers' when calculating average stems per hectare. Given the two years of data show consistency in yield, we have decided to include *all* responses for both 2025 and 2024.

HOW STEMS ARE SOLD

- retail & whole...
- retail only
- wholesale only
- not yet selling



- In 2025, 66% of respondents sold to both retail and wholesale customers (sample size 200) with 20% selling retail only and 6% selling wholesale only (Figure 4).
- For the 37 businesses with revenues above £40,000, selling is more diversified with 81% selling both retail and wholesale, 5% retail only and 8% wholesale only.
- Selling in mixed buckets is popular among members, with 56% of respondents selling wholesale buckets and 67% selling retail buckets.

Figure 4. How stems are sold

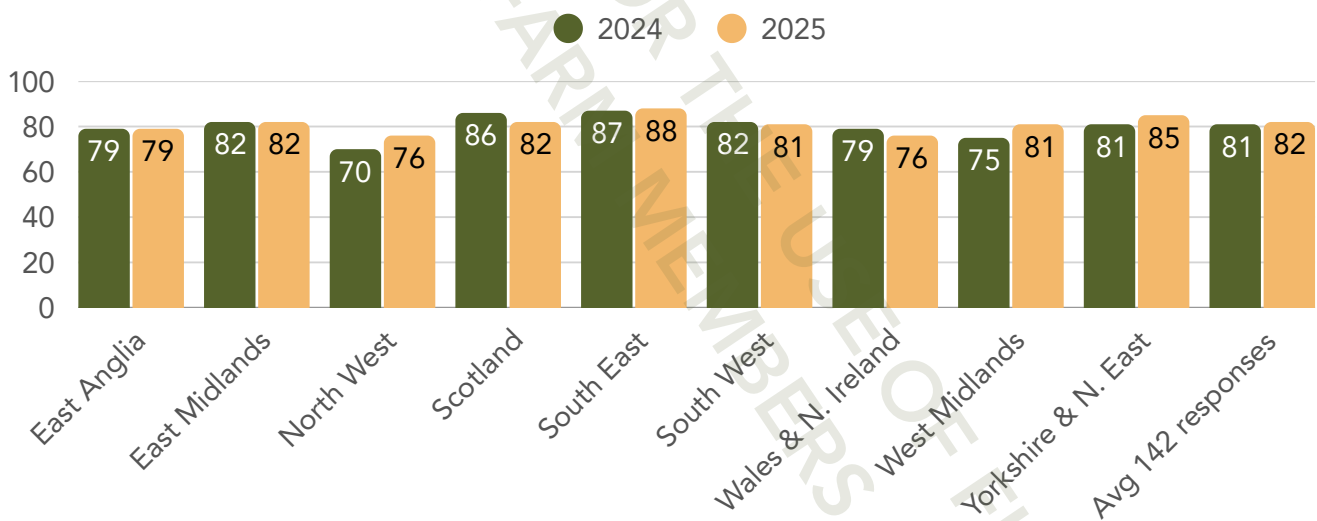
WHOLESALE PRICING

- The weighted average wholesale stem price was 82 pence in 2025 compared to 81 pence in 2024. This is based on 142 responses (2024: 148 responses), only one of whom grew a single or limited range of crops; the rest grew a wide variety.
- There is a wide variation in members' wholesale pricing. Ranking responses from highest to lowest stem price, the average for the upper quartile was 104 pence (2024: 120 pence) and for the lower quartile it was 61 pence (2024: 56 pence).
- Businesses with revenues over £40,000 reported a slightly higher weighted average wholesale stem price of 84 pence. Businesses with revenues of £10,000 or below reported a weighted average wholesale stem price of 81 pence.

WHOLESALE PRICING BY REGION

- The regional variations in wholesale pricing have narrowed; the highest priced region is now only 16% above the lowest priced region, compared with 24% above in 2024 (Figure 5).

Figure 5. Wholesale stem price by FftF region



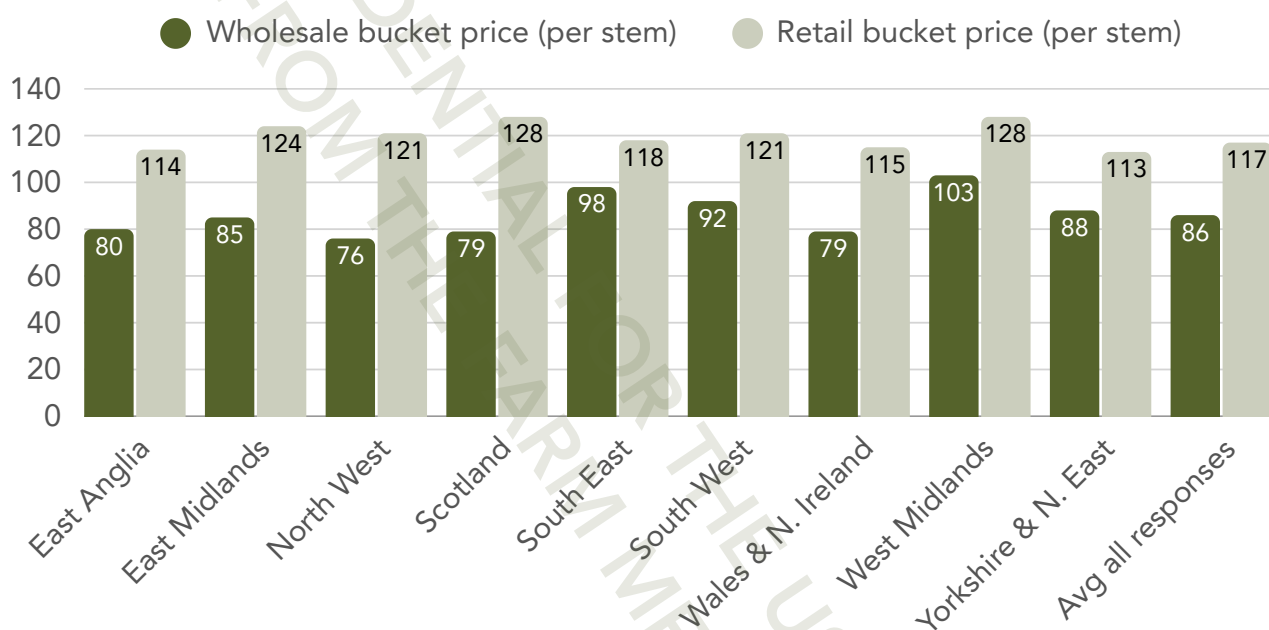
BUCKET PRICING

- For wholesale mixed buckets, the average price increased 6% to £47 for an average 55 stems, 86 pence per stem, compared to 81 pence per stem in 2024. This is based on 112 responses for 2025.
- For retail mixed buckets, the average price was £67 for an average 57 stems, or 117 pence per stem, compared to 114 pence in 2024. This is based on 136 responses for 2025.
- The average retail bucket mark up compared to wholesale buckets was 36% in 2025, below the 43% mark up recorded in 2024 (Figure 6).

BUCKET PRICING BY REGION

- There are wide variations in wholesale bucket pricing by region, with a 36% difference between the highest and lowest regional price.
- For retail buckets, the pricing variation was less, with only a 13% difference between the highest and lowest regional price (Figure 6).
- The biggest retail mark up was in Scotland whereas the lowest was in the South East.

Figure 6. Wholesale and retail bucket prices by FftF region



CONCLUSIONS

While the detail of this report remains confidential for member use only, certain data points can be used externally to talk about the business of flower farming and the nature of our organisation:

- 97% of respondents are growers and 76% do some combination of growing and floristry
- 94% of growers cultivate a wide range of crops
- Average revenues were £34,000 for those who responded
- Average plot size was 0.4 hectares or 1.0 acres for those who responded
- Average stems per hectare was 43,500 (or 17,600 stems per acre) for those who responded
- Weighted average wholesale price was 82 pence for those who responded

Our best estimate of total wholesale value of stems grown by our organisation is £19.9 million*, however we need a higher participation rate to improve the accuracy of this estimate. The Board and EDS Task & Finish group are looking at ways to improve member data collection for 2026, including through the new website and a stem count platform or app.

* refer to page 12 for a list of data limitations which affect the accuracy of this estimate

APPENDIX: DATA LIMITATIONS

We have identified the following limitations to using the survey data to estimate wholesale production of £4.0 million for 190 respondents:

- **Stems per hectare:** There is wide variation in stems per hectare within the sample of 104 respondents and a simple average of 43,500 stems per hectare may not be representative of the larger population of 190 respondents who reported area under cultivation. For example, the average stems per hectare number is reduced by the inclusion of several very large farms (by area) with low stems per hectare values.
- **Wholesale stem price:** The average wholesale stem price of 82 pence is based on 142 responses and may not be representative of the wider population. It may be overstated if, for example, a grower is selling to a florist who is buying in low quantities. The average mark up on retail buckets was only 36% compared to wholesale buckets which could suggest the wholesale price is overstated.

Overall we have a high degree of confidence in the £4.0 million estimate because it is based on a large sample size for both stems per hectare and wholesale stem price (55% and 75% respectively of 190 respondents), and because the 2025 values are broadly consistent with those for 2024, even though there was only a 41% overlap of respondents in both years.

The following *additional* limitations apply to calculating a best estimate of wholesale production for the 1,000 strong membership of Flowers from the Farm (£19.9 million).

- **Selection bias:** The members who completed the survey may not be a random sample but may be larger farms with more detailed record keeping (or they could be smaller farms on which it is easier to collate data). We therefore do not know whether the following data points from the survey are representative of the wider membership:
 - Average land under cultivation of 0.4 hectares (1.0 acres) for grower members
 - Average stems per hectare of 43,500 for grower members
 - Weighted average wholesale stem price of 82 pence for grower members
 - 93% of the membership are growers (as opposed to non-grower florists or schools)
- **Small sample size:** the data on growing area is based on 20% of total membership, whereas the data on stems per hectare and wholesale price are based on 10% and 14% of total membership respectively.

We therefore have a low degree of confidence in the £19.9 million estimate because 1) we do not know if the data is representative and 2) the sample size is small.

A photograph of a farm scene. In the foreground, there are several blue flowers in focus. In the middle ground, there is a large, arched polytunnel covered in white plastic, surrounded by various plants and flowers. To the left of the polytunnel is a small wooden shed. The background is filled with tall, leafy trees under a bright sky. A white rectangular box is overlaid on the upper part of the image, containing the title and subtitle.

FLOWERS FROM THE FARM

Supporting British Flower Farmers

Thank you to all the members who took part in this survey and huge thanks to the members of the Economic Data Survey 2025 task and finish group:
Rachel Belsham, Cissy Bullock, Fergus Corrigan, Rozanne Delamore, Miranda Michalis, Natasha Midgley, Fiona Paxton, Jenna Walker, Heather Ward, Olivia Wilson, Sandra Williams and Rebecca Yussuf