

FLOWER SECTOR

KENYA



Export-driven



Kenya **exports** over **95%** of its **flowers**, contributing to 18% of the country's total exports, ranking second after tea in terms of value. **Fresh-cut roses** dominate, making up the majority of flower exports.



Large rose growers

Kenya's rose sector shifted after the '90s to **large-scale greenhouses**, enabling high-value production, market-driven innovation, and the need for rose **breeding programs**. Rising costs and competition have let **large growers to dominate**, creating barriers for new entrants.



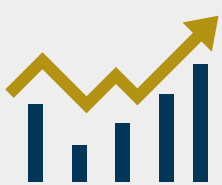
Increasing summer flowers

Summer flowers account for **30%** of Kenya's flower production, projected to reach **50% in 5-10 years**. With 70-80 varieties, large growers **diversify from roses**, while smallholders focus on **niche types**, benefiting from low investment needs for open-field cultivation.

Table 1. Certified areas under production per crop (2023), indicated for all farms audited under the KFC certification scheme. Source: KFC.

Flower	Hectarage	Flower	Hectarage
Rose	1,918	Alstroemeria	70
Limonium	137	Carnations	58
Solidago	123	Eryngium	38
Hypericum	122	Veronica	30
Gypsophilia	87	Chrysanthemum	29

Flower market trends



The **EU** is Kenya's **top market** for roses, leading in both volume and value. While exports to the **Netherlands** have slightly **declined**, global demand is rising, driven by markets in the **Middle East** and **Central Asia**, especially Kazakhstan and Saudi Arabia. Similarly, Europe, mainly the Netherlands and UK, remains key for summer flowers, with growing **direct supermarket sales** and expanding exports to the Middle East and Central Asia.

Main opportunities



Demand for Kenya's **premium roses**, valued for their larger head sizes, is growing. Markets are expanding **beyond the EU** to the Middle East and Central Asia. **Direct retail trade** cuts costs and improves time-to-market, while **hybrid logistics** (sea and air) improve efficiency and sustainability. Research in **pest management** and **climate-smart agriculture** is set to enhance quality and competitiveness.



Niche summer flowers help **smallholders** stand out and meet demand, especially for mixed bouquets, where large growers source up to 25% from them. **Digital platforms** enable direct exports, particularly to emerging markets. **Compliance** with **GAP** and **sustainability** standards is key for market access and competitiveness by reducing carbon footprints.

The study was commissioned by COLEAD and can be found [here](#) (roses) and [here](#) (summer flowers)