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Improved Market Access for Australian Wildflowers through Ecolabelling



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Development Corporation**

Improved Export Market Access for Australian Wildflowers through Ecolabelling

By Emily Rigby & Richard Gould

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Foreword

Flower growers around the world are signing up to ecolabels that assure customers the flowers have been produced in an environmentally and socially responsible manner.

This report aims to provide members of the Australian wildflower and native plants industry with the necessary information to help them make informed choices about ecolabels available in their export markets. The report also considers the advantages and disadvantages of establishing a unique Australian wildflower ecolabel.

This project was funded from RIRDC core funds provided by the Australian Government and from industry funds provided by Cedar Hill Flowers and Foliage Pty Ltd.

This report is an addition to RIRDC's diverse range of over 2000 research publications and it forms part of our Wildflowers and Native Plants R&D program, which aims to understand, strengthen and develop markets.

Most of RIRDC's publications are available for viewing, free downloading or purchasing online at www.rirdc.gov.au. Purchases can also be made by phoning 1300 634 313.

Craig Burns
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Acknowledgments

Damien Griffante of the Winemakers' Federation of Australia provided invaluable information regarding the development of the Australian wine industry's *Entwine* ecolabel scheme.

Industry funding was provided by Cedar Hill Flower & Foliage Pty Ltd.

Abbreviations

B2B	business-to-business
EU	European Union
FFP	Fair Flowers Fair Plants
FLO	Fairtrade Labelling Organisations International
FLP	Flower Label Program
GAP	Good Agricultural Practice
JFMA	Japan Floral Marketing Association
MPS	Milieu Programma Sierteelt (Floriculture Environmental Program)
NGO	Non government organisation
RA	Rainforest Alliance
SAN	Sustainable Agriculture Network
SCS	Scientific Certification Systems
WFA	Winemakers' Federation of Australia

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Executive Summary

What the report is about

This report aims to provide growers and exporters of Australian grown flowers and foliage native to Australia and South Africa with the necessary information to help them make informed choices about ecolabels available in their export markets.

Who is the report targeted at?

The results of this project will provide wild flower and foliage growers and exporters with information to enable them to choose the most appropriate ecolabel to maintain and grow their share of international floriculture markets.

Background

The Australian wildflower and native plants export industry faces increasing competition from overseas suppliers of Australian wildflowers and substitute products. European importers are already indicating that ecolabels will be a requirement for future market access. Certification to a recognised ecolabel will be an important way for Australian growers and exporters to differentiate their products to maintain and grow market share. Australian growers and exporters are faced with a number of ecolabel schemes.

Aims/objectives

The aim of this research was to provide the necessary information to enable individual Australian wildflowers and native plants industry suppliers to determine on a cost benefit basis the most appropriate ecolabelling scheme(s), according to their current situation, and their existing and potential export markets.

Methods used

Preliminary literature reviews of journals and internet websites were conducted into the history and variety of ecolabel schemes available in the major markets for the Australian wildflower and native plants industry (Japan, North America, Europe, China, Middle East, East Asia and South East Asia). Personal communications were also conducted with ecolabel scheme administrators as part of this research. Leading importers and wholesalers in these major markets, as well as industry associations, were identified and asked to participate (via email) in an anonymous web-based survey to identify their ecolabel requirements and preferences. The requirements of the preferred ecolabel scheme were then identified including the certification and on-going costs of the preferred scheme. The costs and benefits of establishing an Australian wildflower and native plants industry ecolabel scheme were also considered.

Results/key findings

There are a growing number of ecolabels in use in international flower markets with an increasing number of overseas flower growers and wholesalers certified under an ecolabel. Correlating with this is the growth of the 'green' consumer and increased competition among suppliers to the international flower markets. It is increasingly probable that ecolabelling will become a prerequisite for access to international flower markets or will be necessary for growers and exporters of Australian flowers and foliage to maintain and grow their share of international flower markets.

While no single ecolabel is currently universally recognised in all markets, the *MPS* business-to-business ecolabel scheme was identified as having the widest recognition and acceptance in

international flower markets. However, participation costs could be an issue. An Australian *MPS* organisation should make it easier for growers to participate in *MPS* and could allow use of a unique Australian *MPS* label. The report found while there are benefits in establishing an Australian wildflower ecolabel the benefits may be outweighed by the costs given the size of the Australian wildflower and native plants export industry.

Implications for relevant stakeholders

The adoption of a suitable ecolabel by growers and exporters of Australian wildflower and native plants has the potential to greatly assist access into export markets as well as having potential environmental and social benefits. This will benefit the industry and the communities in which the growers are located. The adoption of an existing ecolabel will have immediate and on-going costs, which will vary according to the size and situation of each particular grower. The establishment of a unique Australian flower ecolabel will also have cost implications for government as funding would be essential given the anticipated costs and the size of the industry.

Recommendations

The successful establishment of an *MPS* Australian organisation, or an Australian wildflower ecolabel scheme, will depend on the involvement of a majority of growers and exporters and the support of industry stakeholders, including industry associations and government agencies. It is recommended that the views of the Australian wildflower and native plants industry (growers, wild harvesters, exporters, industry associations, government agencies and other stakeholders) to establishing an *MPS* Australia or alternatively an Australian flower ecolabel be ascertained.

1. Introduction

Growers and exporters of flowers and foliage of Australian wildflowers and native plants are facing increasing challenges – economic stagnation in many importing countries; a high Australian dollar; increased competition from low production cost countries; increasing input costs etc. Concern about the environmental and social impacts of flower production is also growing among consumers, retailers and wholesalers in major export markets. In response to these challenges flower growers around the world are signing up to ecolabels that assure customers the flowers have been produced in an environmentally and socially responsible manner. The Australian wildflower and native plants export industry cannot afford to ignore ecolabels if it wishes to remain competitive in the major world flower markets.

2. Objectives

This project will provide the necessary information to enable individual Australian wildflowers and native plants industry suppliers to determine, on a cost benefit basis, the most appropriate ecolabelling scheme(s) according to their current situation and their existing and potential export markets.

3. Methodology

Preliminary literature reviews of journals and internet websites were conducted into the ecolabel schemes available in the major markets for the Australian wildflowers and native plants industry (Japan, North America, Europe, China, Middle East, East Asia and South East Asia). Personal communications were also conducted with ecolabel scheme administrators as part of this research.

Seventy-nine leading importers and wholesalers, as well as industry associations representing importers, wholesalers and retailers in the major markets were identified and asked to participate (via email) in an anonymous web-based survey to identify their ecolabel requirements and preferences (November 2010). Survey recipients were also asked to forward the survey on to their constituents and members.

The web-based ecolabel survey was prepared using online survey software Survey Monkey (www.surveymonkey.com). This format was chosen for accessibility, wider audience, ease of completion, higher response rates and ease of data entry and analysis. Follow-up emails were sent to all survey recipients reminding them to complete the web-based ecolabel survey if they had not already done so. The survey was then closed at the end of April 2011.

Survey results were collated and analysed. The requirements of the preferred ecolabel scheme (*MPS*) were then identified, including the certification and on-going costs. The potential costs and benefits of setting up an Australian local coordinator/organisation for *MPS* in Australia similar to *MPS Japan* were investigated.

The costs and benefits of establishing an accredited Australian wildflowers and native plants industry ecolabel were also ascertained.

4. Ecolabels

An ecolabel is an authorised mark, logo or seal of approval which an independent organisation (a third party certification body) licences a flower grower to use after assessment (verification) that the way the flowers have been produced meets specified environmental and/or social criteria (standards). The certification body should be independent of the scheme participants, and of the ecolabel scheme administrator, if it includes scheme participants. An accredited certification body is one that has itself been certified by an independent organisation (accreditation body) as being competent to audit and certify scheme participants.

In response to criticisms about the environmental impact and working conditions of flower production a variety of flower ecolabel schemes have been developed since the 1990's by grower groups, traders, large retailers and producer associations often in developing countries.

Why have an ecolabel?

The main reason given by ecolabel certified growers in Europe for participating in ecolabel schemes is to meet buyer requirements in order to access otherwise inaccessible markets.

Other reasons given:

- as a form of self-regulation to pre-empt mandatory labelling requirements
- as a management tool to professionalise their business
- to profile their company as a professional, sustainable quality brand with the expectation of a better return

(Rikken 2010)

While the flower ecolabel schemes generally deal with the same environmental and social issues, the purpose and scope of these schemes vary greatly (Rikken 2010). Some schemes are business-to-business labels not communicated directly to consumers such as *MPS* and *GLOBALGAP*. Others are consumer labels such as *Fair Flowers Fair Plants (FFP)*, *Fairtrade*, *Rainforest Alliance* and *Flower Label Program (FLP)*. Some try to be both a business-to-business label and a consumer label such as *Veriflora*. Some schemes only cover flowers and other floricultural products such as *MPS*. Other schemes have added flowers to a wider range of certified products such as *GLOBALGAP*, *Fairtrade* and *Rainforest Alliance*.

Some schemes certify traders and retailers as well as growers such as *MPS*. Some schemes certify to the standards of other schemes. For example *MPS* through its *MPS-GAP* label certifies growers to *GLOBALGAP* and *Ethical Trade Initiative* (which is not strictly a certification scheme). Some schemes focus on growers from developing countries such as *Fairtrade* and *Rainforest Alliance*. Increasingly, supermarket chains are developing their own private consumer labels such as *Tesco Nurture* (previously known as Nature's Choice). Some private labels are associated with general consumer labels such as *Fairtrade*. Some schemes are national in scope, particularly those in developing countries such as *Kenya Flower Council Code of Practice*, *Florverde* (Columbian growers) and *Florecuador* (Ecuadorian growers). Other schemes are international in scope with growers in more than one country. A number of ecolabel schemes are harmonising their standards through a benchmarking process. For example *MPS* certified growers can use the *FFP* consumer label and growers certified to *Florverde* can use the *GLOBALGAP* label.

While participation in an ecolabel scheme is (currently) voluntary, there are costs. The cost varies between schemes but generally includes registration fees and annual fees payable to the scheme administrator. These fees are usually based on the size of the farm. In addition there are audit fees and

costs (i.e. travel, accommodation, meals) payable to the scheme-approved auditor. These audit costs could be high if there is no scheme-approved auditor in the grower's country. Growers will also have to meet their own on-going administrative costs for participating in the scheme (e.g. data collection). Growers may also have compliance costs (e.g. changing chemical inputs). The amount of administrative and compliance costs each grower will have to meet will depend on their existing management systems, processes and practices. In addition to the direct costs, participation in an ecolabel scheme involves an application process including farm and product plans and maps and a list of chemical inputs, continual monitoring of key inputs and regular reporting to the scheme administrator and periodic audits by a scheme-approved auditor.

The following section provides brief details of the main flower ecolabel schemes. Unless otherwise indicated the source of information on the number, type and nationality of scheme participants is the scheme (English) website (see section 13 for a list of scheme websites). Independently verified data on scheme participants is not available. Some scheme websites have no or little information on participation rates and on others the information is several years old.



Fair Flowers Fair Plants

Fair Flowers Fair Plants (FFP) is a consumer label administered by a government-supported independent foundation based in The Netherlands. *FFP* was developed by 40 European and developing country flower industry stakeholders including Union Fleurs (the International Floricultural Trade Association), flower trade organisations, green groups, government agencies and unions. The goal of *FFP* is to become the consumer label for the various business to business labels. A number of certification schemes have been accepted as approved certification schemes for *FFP* participation. The criteria for the *FFP* label for growers is certification to *MPS-A* and to *MPS-SQ* or equivalent environmental and social certifications. Growers are audited annually by an accredited, independent certification body accompanied by a trade union observer and a local NGO observer. *FFP* products are only sold through affiliated *FFP* traders and retailers and the *FFP* label can only be added once it reaches the retail level. As at October 2010 *FFP* had 75 participating flower growers in Europe and Africa, 187 European wholesalers and its products were sold in over 4 000 retail outlets mainly florists but also supermarkets and garden centre chains in Europe (Rikken 2010).



Fairtrade (Max Havelaar)

The *Fairtrade* consumer label is administered by Fairtrade Labelling Organizations International (FLO). FLO represents 17 member organisations in various countries, including Australia, that use the *Fairtrade* label or a national version (e.g. *TransFair*) on a range of agricultural, mineral and manufactured products. The first *Fairtrade* label 'Max Havelaar' was used for coffee from Mexico sold into Dutch supermarkets and was named after a fictional Dutch character who opposed the exploitation of coffee pickers in Dutch colonies. The *Fairtrade* flower label standard only applies to growers that use hired labour. *Fairtrade* certification is only available to producers in undeveloped and developing countries listed by FLO. Currently there are over 50 certified flower growers in Ecuador, Egypt, Ethiopia, India, Kenya, Sri Lanka, Tanzania and Zimbabwe. The *Fairtrade* label is thought to be the leading label in Europe in terms of flowers sold with consumer awareness of the *Fairtrade* label exceeding 80 per cent in some countries (Rikken 2010). *Fairtrade* flowers are sold in all major European markets particularly supermarkets.



Flower Label Program

The *Flower Label Program (FLP)* was set up and administered by a non-profit German association consisting of human rights organisations, trade unions, certified growers and industry associations. There were 54 certified flower farms in six countries: Chile (1), Ecuador (42), Germany (6), Kenya (1), Portugal (1) and Sri Lanka (1). *FLP* was supported by 32 wholesalers and importers and certified flowers were sold through a network of about 1400 affiliate florists mostly located in Germany. There are serious doubts about the viability of the scheme with offices being closed and the human rights organisations and trade unions withdrawing from the association at the end of last year due to differences with growers and traders over the direction of the scheme (Rural 21 2012).

GLOBALGAP



GLOBALGAP (formerly known as *EUREPGAP*) has the second largest flower ecolabel scheme in Europe (Rikken 2010). It was established in 1997 by several of the big retail chains in Europe for the certification of agricultural products around the globe. Over 100 000 farms have been certified. *GLOBALGAP* consists of a series of comprehensive and detailed pre-farm-gate standards including one for flowers and ornamentals. The standards cover all processes and activities from farm inputs until the product leaves the farm. Topics include integrated crop management, integrated pest control, quality management system, hazard analysis and critical control points, worker health, safety, welfare, environmental pollution and conservation management. Certification is carried out by independent and accredited certification bodies. There is one provisionally approved certification body for the flower standard in Australia. The scheme also provides for annual inspections and additional unannounced inspections. While no list of *GLOBALGAP* certified farms is published, there are estimated to be around 400 certified flower growers in 24 countries including growers certified to benchmarked standards such as *MPS-GAP* and *Florverde* (Rikken 2010). *GLOBALGAP* certified flowers are sold principally in the supermarket chains of its 40 European retail members particularly in Germany and UK.

MPS



MPS stands for 'Milieu Programma Sierteelt' or 'Floriculture Environmental Project'. *MPS* was established as an environmental label in 1995 by the Dutch flower auctions and flower growing organisations. Based in The Netherlands today, *MPS* is active in more than 50 countries with a number of overseas co-ordinators supporting local participants. For example, in 2006 *MPS* in association with the Japan Floral Marketing Association established *MPS-Japan* to coordinate and promote the scheme and assist Japanese grower participants. The *MPS* scheme provides a modular series of labels for growers including environmental (*MPS-ABC*), social (*MPS-SQ*), quality (*MPS-Quality*) and retail (*MPS-GAP*) aspects. *MPS-A* is the highest ecolabel awarded under the *MPS-ABC* environmental ecolabel program. *MPS-ABC* currently has 3403 participants worldwide (Floriculture International 2012). This includes 25 in USA, 2 in Canada, 166 in Japan and 2 in China (both pot plant growers). Eighty per cent of flowers sold at the Dutch auctions are under the *MPS* label (Stewart 2007). *MPS* also provides a series of labels for traders. The scheme administrator is the *MPS* Foundation whose board consists of members of the boards of FloraHolland (auctions), the Dutch Association of Wholesale Trade in Horticultural Products, the Dutch Federation of Agricultural and Horticultural Organisations, The Netherlands Inspection Service for Horticulture (a government agency) and *MPS* staff. The certification body is *MPS-ECAS* a private limited company owned by *MPS*.

Rainforest Alliance



Rainforest Alliance (RA) is a US based not-for-profit environmental organisation and member of the Sustainable Agriculture Network (SAN), a coalition of conservation groups mainly in Latin America. *RA* began certifying forestry operations in 1989 and now covers a range of agricultural products. The flower standard was developed by SAN in 2001 to promote good environmental, labour and agronomic practices. Certification is carried out by one of two accredited certification bodies, one a division of *RA* and the other a subsidiary. Certified growers are licensed to use the *RA* green frog seal provided traceability requirements are met. There are currently 54 *RA* certified or verified flower operations in Latin America and one in Africa. The majority of *RA* certified flowers are sold into the North American market.

Veriflora



Veriflora is an environmental and social certification system for floricultural products administered by Scientific Certification Systems (SCS), a private US third party certifier of environmental, sustainability and agricultural standards. It is the only US developed flower-specific ecolabel scheme for North American growers. SCS developed the *Veriflora* standard in 2003 at the instigation of a group lead by an online organic flower seller and a wholefoods supermarket chain and certified its first grower in 2007. Currently the *Veriflora* scheme has 29 cut flower grower participants (8 in USA, 21 in South America), seven participating wholesalers (3 in USA, 3 in Canada, 1 in Ecuador) and 10 preferred US flower retailers. SCS is both the scheme administrator and the certification body.

5. Major markets

The major markets for Australian wildflower and native plant products are Japan, Europe and North America, accounting for over 90 per cent of the market. The balance of export sales are mainly to China, the developed countries in East and South East Asia and the Middle East.

Europe

Ecolabelled flowers are estimated to make up 50 to 75 per cent of flowers imported into the EU (Riisgaard 2009). The vast majority of European growers have ecolabels (Rikken 2010). The Dutch auction clocks only show participants of *MPS* and *FFP*. Ecolabels are increasingly being used by overseas growers supplying the European market and being required by European wholesalers and retailers. One reason has been the growth of the 'green consumer' (SCC 2011). Another reason has been the strategy of wholesalers to differentiate themselves by using sustainable products in response to competition from the increasing direct trade between growers and large retailers. As a result, ecolabels are fast becoming a de-facto entry requirement to the European market. The demand for and type of ecolabel required in the European market depends on the particular sales channel. Exporters to Europe need to understand the specific ecolabel requirements of the different sales channels in which they wish to compete (Rikken 2010). The majority of flower sales in most of Europe (excluding UK) still occur through traditional florists who buy from wholesalers especially the cash and carry outlets. Ecolabels are not currently a requirement for this channel although the majority of product that enters this channel via the auctions is ecolabel certified. The growth of florist chains is expected to see a rise in demand for ecolabelled flowers in the florist channel. Ecolabels are required for the European large retail channel with the large supermarket chains increasingly adopting their own private all-product ecolabel (e.g. *Tesco Nurture* label) often based on existing ecolabel schemes.

North America

While the overwhelming majority of cut flowers sold in North America are currently not ecolabelled, retailers, wholesalers, and consumers are pressuring for more sustainable flowers (Bauer 2007; Hall *et al.* 2010). The large supermarket chains are increasingly following the approach taken by the European chains. The emerging LOHAS (lifestyles of health and sustainability) market segment makes up 30 per cent of US households and spends \$230 billion pa on socially and environmentally responsible products (Stewart 2007). The recent release of the US *Draft National Sustainable Agriculture Standard* is expected to add impetus to the take-up of ecolabels in that country. The draft standard was patterned after the *Veriflora* standard (Constance 2010).

Japan

While ecolabels are not currently a requirement for access to the Japanese flower market, their presence is growing. In 2006 the Japan Floral Marketing Association introduced *MPS* to Japan (JFMA 2012). The JFMA (mission: to 'boost the floral consumption in Japan') has 250 members from across the industry including seedling companies, growers, floral auction markets, wholesalers, bouquet makers, supermarkets and florists. Currently there are 166 Japanese growers participating in *MPS*. The largest flower auction in Japan recommends *MPS* labelled flowers and has added *MPS* details to its auction clock (Flower Auction Japan 2012).

Other markets

Ecolabels are not currently required for access to the flower markets in China or the developed countries in East and South East Asia and the Middle East. Focus on environmental issues in flower production in China is increasing (Kargbo *et al.* 2010). There is an increasing demand among the growing middle class Chinese and Asian consumers for ecolabelled products (Ogilvie & Mather 2011; TUV SUD 2011).

6. Ecolabel survey

Format, methodology & participants

Following identification of the major ecolabel schemes operating in the major Australian wildflowers and native plants export markets an anonymous web-based ecolabel survey was prepared to gather information regarding the use of these ecolabels in a variety of countries and export markets. The web-based format (www.surveymonkey.com) was chosen for accessibility, wider audience, ease of completion, higher response rates and ease of data entry and analysis.

The survey was made available 30 November 2010 via emails containing the link sent to the leading importers, wholesalers and industry associations (representing importers, wholesalers and retailers) identified in the major Australian wildflowers and native plants export markets. Follow-up emails were sent (February 2011) reminding participants to complete the web-based ecolabel survey if they had not already done so. The survey was then closed at the end of April 2011 and results were collated.

Thirty five percent of survey recipients participated in the online survey. Survey participants consisted mainly of importers (57%), wholesalers (18%) as well as florists (7%) and industry associations (7%) in the major Australian wildflowers and native plants export markets (Figure 1). Survey participants' were located in 12 different countries (Table 1).

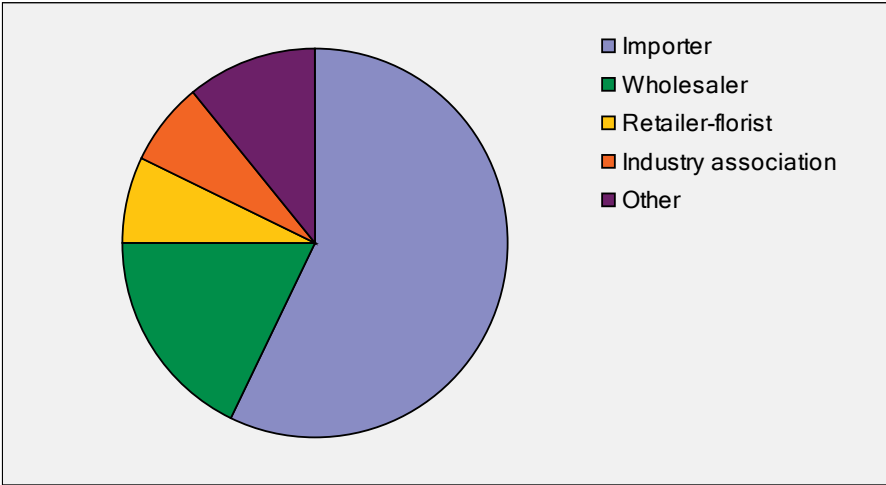


Figure 1: Core business of ecolabel survey participants

Table 1: Location of ecolabel survey participants

Country	Percentage
Australia	10.7%
Canada	3.6%
Czech Republic	3.6%
Germany	7.1%
Indonesia	3.6%
Japan	3.6%
Korea (South)	3.6%
Netherlands	17.9%
Singapore	7.1%
Switzerland	3.6%
United Kingdom of Great Britain	21.4%
United States of America	14.3%

Results

Less than 10 per cent of survey participants said their customers require (i.e. only purchase) ecolabelled cut flowers (Figure 2). These customers were wholesale and mass market customers in Western Europe and mass markets in the UK.

Ecolabel survey comments 1

'All UK supermarket re-packers [flower providers], in principal, only buy from accredited farms' (**Importer UK**)

Forty per cent of survey participants said their customers prefer to buy ecolabelled cut flowers over non-ecolabelled cut flowers of the same quality (Figure 2).

However, 87 percent of survey participants said their customers currently buy cut flowers without an ecolabel (Figure 2).

Ecolabel survey comments 2

'In general, accredited farms have put more investment in their farms, thus having a better quality product' (**UK importer**)

'In general, the consumer in the European market, as well as in the Swiss market, expects from the trade that all product is socially and environmentally grown in a correct way' (**Importer Switzerland**)

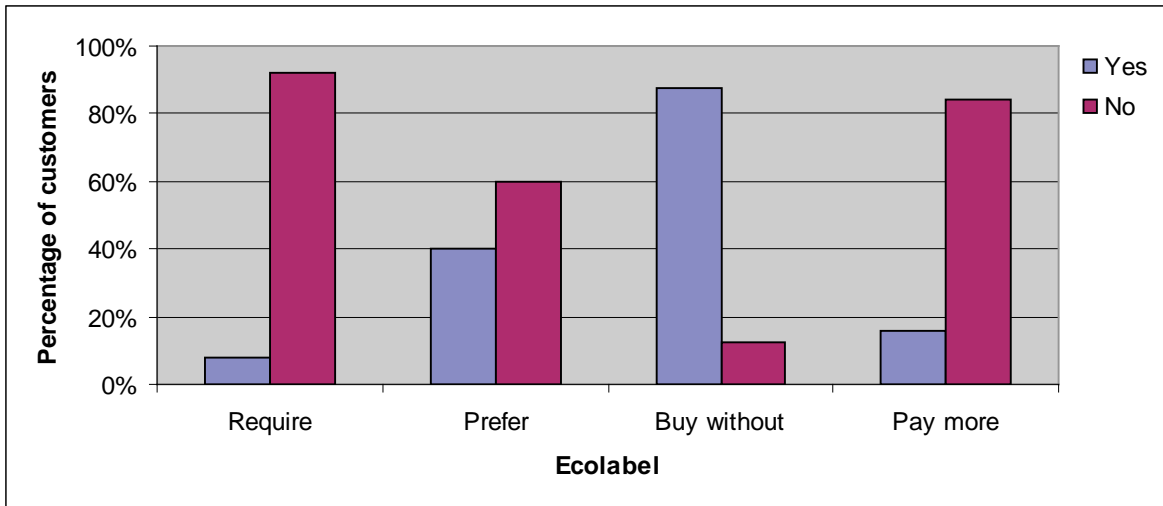


Figure 2: Comparison of customer's preferences and buying patterns of ecolabelled cut flowers

Thirty-two per cent of survey participants said the demand for ecolabelled cut flowers had increased in the 12 months prior to the survey, 63 per cent said it had remained constant and only 5 per cent said it had decreased.

Sixty-three per cent of survey participants said the demand for ecolabelled cut flowers and foliage will increase in the future (Figure 3).

Ecolabel survey comments 3

'There are already bouquet companies who work with just eco friendly or *MPS* certified products and that market will grow in the future' (**Importer Netherlands**)

'Most wholesale customers do not care what label there is, but they ask for certified product' (**Importer Switzerland**)

'People will take more and more notice of ecolabelled flowers, so in the future it will be more and more important' (**Wholesaler Germany**)

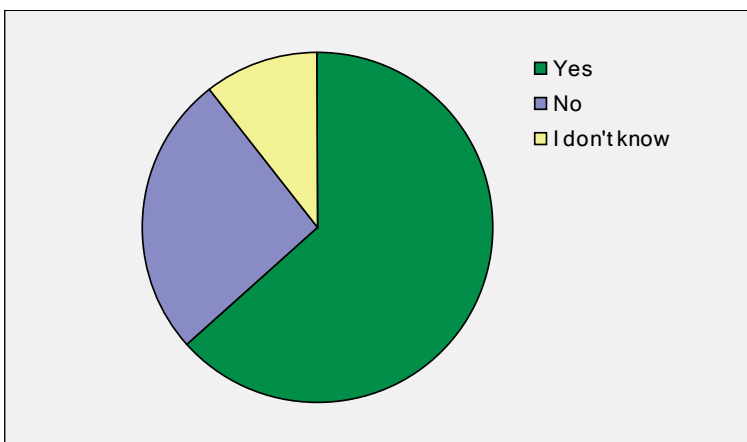


Figure 3: Ecolabel survey participant response to question: 'Do you think the demand for ecolabelled cut flowers will increase in the future?'

Forty-two per cent of survey participants said ecolabelled cut flowers have a better market access than cut flowers of the same quality without an ecolabel.

Survey comment 4

'All cut flower products would benefit from having an ecolabel' (**Importer Canada**)

However, 60 per cent of survey participants never or rarely (<20% of the time) pay more for an ecolabelled product. Thirty-two per cent of participants never pay more (Figure 4).

Sixteen per cent of survey participants said their customers pay more for cut flowers with an ecolabel than for cut flowers of the same quality without an ecolabel (Figure 2).

Survey participants who said their customers pay more for product with an ecolabel also said they paid more for the ecolabelled product from their suppliers.

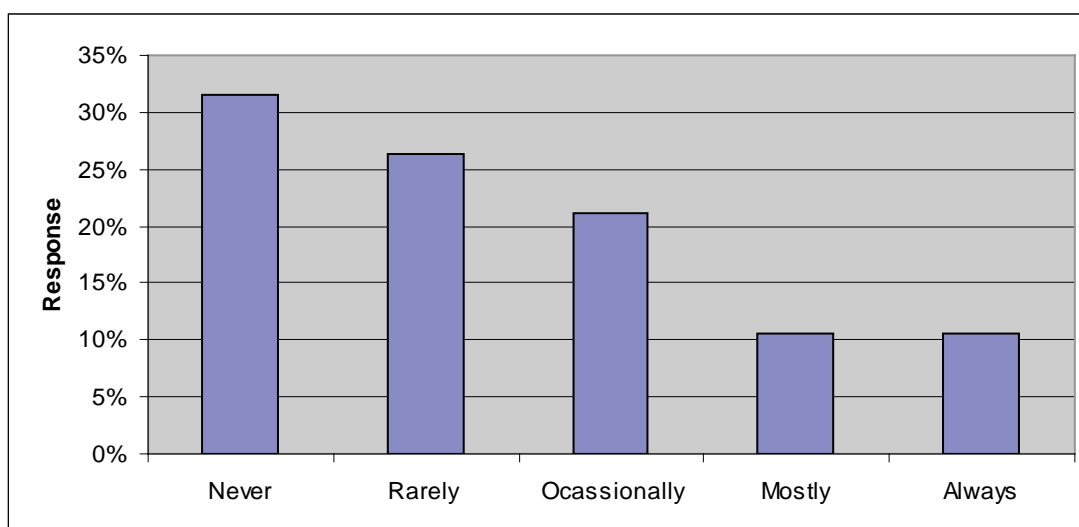


Figure 4: Proportion of ecolabel survey participants who pay more for ecolabelled cut flowers of the same quality from their suppliers

Note: Rarely: <20% of the time; Occasionally: 20-60%; Mostly: 60-95%; Always: >95% of the time.

Many comments from survey participants highlighted the issue of the price of cut flowers with an ecolabel. The majority of survey participants believed products can benefit from having an ecolabel however price must be the same.

Ecolabel survey comments 5

'The price must be at (almost) the same level' (**Wholesaler Netherlands**)

'In my opinion the customer is not willing to pay more for ecolabels, but this is not realistic' (**Importer Netherlands**)

'Our customers only care about the price. Perhaps opinions might change when the recession is over' (**Wholesaler UK**)

Survey participants identified a number of ecolabels required or preferred by them or their customers:

- *MPS-ABC* was a preferred ecolabel of wholesalers, florists and mass market retailers in West Europe including The Netherlands, Germany, Austria and South America.
- *MPS-ABC* was the required ecolabel for West European mass market retail customer(s) of a Netherlands importer.
- *MPS-ABC* was also the required ecolabel for German wholesale customer(s) of another Netherlands importer.
- *Veriflora* was a preferred ecolabel of wholesalers in Canada and mass market retailers in USA.
- *Fair Trade* (including *Max Havelaar*) was a preferred ecolabel of mass market retailers in West Europe and UK, florists in Switzerland, and wholesalers in West Europe and Canada.
- *Max Havelaar* was the required ecolabel of West European wholesale customer(s) of a Netherlands importer.
- *FFP* was a preferred ecolabel by retail florists in West Europe, including Germany.
- *FLP* was a preferred ecolabel for South American wholesalers.

Ecolabel survey comments 6

'In general, all the labels are sensibilising the producers that are not yet certified.' (**Importer Switzerland**)

'I think most wholesalers do not know/understand what most of the labels mean; there has never been any education from anybody telling them what they mean. Their individual sales person may have explained it to them but that is it. Thus it then never gets pushed down to the florists. Fairtrade and Rainforest Alliance are recognised mainly due to the work of the coffee companies' (**Importer UK**)

'Only if the labels are recognised by the general public, or else how can they ask for something they are not aware of; also [in the] current economic climate most people just want a product at a price and an ethical conscience gets put to the wayside over price' (**Importer UK**)

'The system needs to be streamlined and made less expensive and available to all growers. There are too many accreditation labels. The fundamental idea is correct i.e. correct practices for workers and the environment; however the point of all this is missed if it is only available either through prohibitive cost or limited availability to some and not all. I believe this is why the concept has not carried through the chain as being important' (**Industry Association UK**)

7. The preferred ecolabel scheme

The survey results confirmed no single ecolabel scheme is universally preferred in all major export markets for Australian flowers and foliage. This may not be a problem for well-resourced multi-market suppliers who can afford to have multiple labels e.g. *MPS* for European florists, *GLOBALGAP* for European supermarkets and *Veriflora* for the North American market. But the multitude of competing ecolabels is a problem for suppliers who want the option of being able to supply all major markets but do not have deep enough pockets to participate in multiple ecolabel schemes. The *MPS-ABC* ecolabel was preferred by more survey participants in more major markets than any other ecolabel in the survey.

There are a number of reasons why the *MPS* scheme looks like the best single ecolabel scheme for Australian growers and exporters wanting to be able to access all major markets. *MPS* is the most widely known and recognised ecolabel scheme in world floriculture. *MPS-ABC* is the preferred ecolabel for the European wholesale-florist sales channel. Participation in *MPS-ABC* is shown on the Dutch auction clocks. *MPS-A* combined with *MPS-SQ* allows use of the *FFP* consumer label. Participation in *FFP* is also shown on the Dutch auction clocks. *MPS-A* combined with *MPS-SQ* and *MPS-GAP* provides access to the European retail sales channel. The *MPS* scheme is well-recognised in Japan with 166 growers participating in *MPS-ABC*. Participation in *MPS-ABC* is shown on the Japan Flower Auction clock. The *MPS* scheme is known in China in part due to the 2006-08 Netherlands-China *MPS* pilot project involving 80 Yunnan flower growers. *MPS-ABC* is known in North America where there are 25 *MPS-ABC* participating growers. The *MPS* label should also see suppliers ahead of the curve as consumer demand for green products grows in China, Asia and the Middle East. The modular nature of the *MPS* scheme allows growers to start with the basic environmental label and add additional labels as required.

MPS-ABC participants are required to monitor and report every 13 weeks on chemical (including fertiliser, pesticide and herbicide), energy and water usage and waste generation. Reporting is done via the internet using an *MPS* supplied ACTRES program. Consumption is assessed against standards developed by *MPS* taking into account regional conditions. Participants are then benchmarked against similar growers in their region with the *MPS-A* rating being awarded to the growers with the best results. An initial audit is conducted after the first 12 months of continual reporting to determine the *MPS A, B* or *C* certification. Subsequently, desk-top or on-site compliance audits are conducted every three years. If an *MPS* certified grower is not exporting themselves but through exporters, then the *MPS* label can only be attached to certified products if the exporter is certified (at a minimum) to *MPS-Florimark (TraceCert)*.

A major issue for Australian suppliers considering *MPS-ABC* is expected to be the cost of participating. *MPS* fees in the first year for a 10 hectare farm are €655 and €605 in subsequent years (Table 2). This fee includes the initial and subsequent audit. Auditor travel and accommodation expenses may also be payable depending on the number of participants being audited. Audit costs could be reduced if there was an accredited Australian *MPS* auditor. In addition are the grower's own on-going administrative costs for participating in the scheme (e.g. data collection, recording and reporting) and any compliance costs (e.g. changing chemical inputs) which will vary from farm to farm depending on current management systems, processes and practices.

Table 2: MPS-ABC annual fees for single location 10 hectare Australian flower farm

MPS-ABC Fees	First year	Subsequent years
Basic annual fee	€ 805	€ 805
New participant administration fee	€50	na
Annual area fee (€80 per ha up to 10 ha)	€800	€800
Total Annual fee	€655	€605

Taking on a certification scheme can be a difficult exercise for even the best resourced growers and training and assistance is crucial especially in the first year. The language gap, different time zones and distance from The Netherlands are potential problems for Australian *MPS* participants. One solution would be to have an *MPS*-trained Australian coordinator to help and assist Australian participants. *MPS* has provided a preliminary proposal for the establishment with the Australian wildflower industry of an Australian *MPS* organisation to employ a coordinator in Australia. The coordinator would provide information to participants and promote and administer the scheme in Australia. Suggested targets would be to sign up 15 growers in the first year and 40 in the second year. *MPS* would provide training, supervision and support including development of Australian specific standards within two years. *MPS* has indicated some reduction in standard fees could be negotiated for participants in an Australian *MPS* organisation. The Australian industry's contribution would be a payment of €25 000 to *MPS* and payment of the coordinator's salary, expenses and costs.

In order to be viable an Australian *MPS* organisation would need the commitment and support of the majority of growers and exporters. Government support would almost certainly be necessary at least initially. As well as providing local training and assistance, a potential benefit of an Australian *MPS* organisation could be an Australian *MPS* label. This label could combine the widespread recognition of the *MPS* brand with Australia's unique identity and green image. Participating in the *MPS* ecolabel scheme via an Australian *MPS* organisation could be cheaper than establishing an Australian ecolabel scheme for wildflowers and foliage (see Section 8). On the other hand, association with an overseas-controlled scheme comes with its own risks and the powers, duties and responsibilities of the scheme controller and the Australian representative body should be specified in detail upfront.

8. An Australian wildflower ecolabel

Another option would be to establish an Australian wildflower ecolabel scheme. A scheme specifically designed for the Australian wildflower industry would have a number of advantages including a unique Australian label, local control, local auditors and possibly lower participant costs. On the other hand, a new Australian flower label would not be known in the major export markets. An information campaign would be needed to convince customers that the new ecolabel was credible and trustworthy.

What makes a credible and trustworthy ecolabel?

Meaningful, verifiable standards: The ecolabel should be based on environmentally and socially meaningful standards that are verifiable by the certification body or other independent auditor.

Consistency: The ecolabel used on one product should have the same meaning when used on other products. Standards should be verifiable in a consistent manner for different products.

Transparency: Information about the organisational structure, funding, board of directors and certification standards of the ecolabel organisation should be publically available.

Independence: The certification body and their employees should not have any ties to or receive any funding, fees or contributions from label users except certification fees. Employees of companies whose products are certified, or who are applying for certification, should not be affiliated in any way with the certification body.

Public comment: Standards should be developed with input from all stakeholders including consumers, industry, environmentalists and social representatives in a way that doesn't compromise the independence of the certification body. Industry representatives can play an important advisory role without having direct financial, decision making or management ties to the certification body.

(from GreenerChoices: <http://www.greenerchoices.org/eco-labels/eco-good.cfm>)

An example of an Australian ecolabel developed for agricultural exporters is the Australian Wine Federation (WFA) *Entwine* scheme for winemakers and wine grape growers.

Entwine 

The *Entwine* scheme was developed by WFA over 12 months at a cost of over \$500 000, half of which was Federal Government funding. Launched in December 2009 *Entwine* now has 650 members representing 63 regions across Australia accounting for 50 per cent of total wine production. Members include Fosters, Orlando, Casella, De Bortoli, Lion Nathan, Yalumba and McWilliams. Two major reasons for developing the scheme were customers kept asking for environmental certification and international competitors were taking up ecolabels.

The *Entwine* scheme is administered by WFA. Participants must be certified to either the *Freshcare* Environmental Viticulture Code (grape growers) or Winery Code (winemakers) or alternatively to the ISO 14001 international environmental management standard. WFA developed the Viticulture and Winery Codes by customising the domestic *Freshcare Environmental Code* which was developed in 2006 for the fresh produce industry. Auditing of *Entwine* participants for certification purposes is done by one of six Australian *Freshcare*-approved independent auditors. Annual fees for *Entwine* are \$110 per vineyard and \$110 (WFA member) or \$440 (non-member) for each winery site. Scheme participants are responsible for their own costs of certification including training and audit costs of around \$400-\$700 (payable every 3 years) and a *Freshcare* certification management fee of \$154 (payable at audit every 3 years).

***Entwine* key success factors and issues**

- government financial support
- the commitment of all state industry associations
- the involvement of the majority of major producers
- the desire of the industry to embrace sustainability.
- a comprehensive information program to educate and bring growers and wine makers on board to ensure the scheme and the need for it are well understood
- convincing overseas customers to trust the new label.

Australian wildflower ecolabel

An Australian wildflower ecolabel scheme could be established on the *Entwine* model with an environmental standard for flower growers based on customising the *Freshcare Environmental Code* which according to *Freshcare* is a generic standard not restricted to food production.

Pros:

- a unique Australian label
- locally controlled scheme
- more relevant standards
- existing Australian auditors
- potential for lower participant fees

Cons:

- lack of recognition in export markets
- no social standard
- higher establishment and on-going scheme administration costs
- lag time between establishing label and customer acceptance

While government support would be crucial in the early stages, a viable Australian wildflower ecolabel scheme could not rely on on-going government funding and would need to be self-funded within a few years. Lower participation fees may not be achievable given the size of the wildflower industry. By comparison, as at December 2011, there were 1279 companies exporting wine valued at A\$1.89 billion.

Lack of market recognition of the ecolabel would need to be addressed by appropriate information programs targeted at customers in the relevant markets. These programs would be very expensive if the new label is a consumer label rather than a B2B label. Alternatively, the scheme could seek to have its standards benchmarked to an existing B2B label such as *MPS* or *GLOBALGAP* and the existing consumer label *FFP* thereby enabling those ecolabels to be applied alongside the Australian label.

An Australian wildflower ecolabel scheme will only succeed if it has the commitment and support of the industry and stakeholders.

9. Results

Growers and exporters of Australian flowers and foliage cannot afford to ignore ecolabels. There are a number of competing ecolabel schemes operating in the major export markets for Australian wildflowers and foliage. No single ecolabel scheme is universally preferred in all of these markets. The *MPS-ABC* ecolabel was preferred by more survey participants in more markets than any other ecolabel in the survey. The *MPS* scheme looks like the best single ecolabel scheme for Australian growers and exporters wanting to be able to access all major markets. Ecolabel scheme participation fees could be a significant factor. The costs of participating will depend on the situation of each grower. There are advantages and disadvantages of establishing an Australian *MPS* organisation. There are advantages and disadvantages of establishing an Australian wildflower ecolabel scheme.

10. Implications

The adoption of a suitable ecolabel by growers and exporters of Australian wildflowers and foliage should help access of those products into export markets as well as having potential environmental and social benefits. This will benefit the industry and the communities in which the growers are located. But the adoption of an established ecolabel will have immediate and on-going costs which will vary according to the size and situation of each particular grower. The establishment of a unique Australian wildflower ecolabel is also likely to have cost implications for government as funding would be essential at least in the initial stages given the anticipated costs and the size of the industry.

11. Recommendations

The successful establishment of an *MPS* Australian organisation or an Australian wildflower ecolabel scheme will depend on the involvement of a majority of growers and exporters and the commitment and support of industry stakeholders including industry associations and government agencies. It is recommended that the views of the Australian wildflowers and native plants industry (growers, wild harvesters, exporters, industry associations, government agencies and other stakeholders) to establishing an *MPS* Australia or alternatively an Australian flower ecolabel be ascertained.

12. Appendices



Appendix A: Ecolabel survey

For the purpose of this survey ‘ecolabel’ means a seal or logo indicating that a product has met a set of environmental and/or social standards

1. Please tick the following that best relates to your business

- Importer
- Wholesaler
- Retailer-mass market e.g. Supermarket
- Retailer-florist
- Retailer-phone/internet
- Industry association
- Other (if other please specify)

2. Please select the country in which your business is located

- West Europe
- East Europe
- North America
- Central America
- South America
- Middle East
- Argentina
- Australia
- Austria
- Bahrain
- Belgium
- Canada
- Chile
- China
- Colombia
- Czech Republic
- Denmark
- Finland
- France
- Germany
- Greece
- Hong Kong
- Hungary
- India
- Indonesia
- Ireland
- Israel
- Italy
- Japan
- Korea (South)
- Kuwait
- Liechtenstein
- Luxembourg
- Malaysia
- Mexico
- Netherlands
- New Caledonia
- New Zealand
- Norway
- Oman
- Philippines
- Poland
- Portugal
- Qatar
- Romania
- Russian Federation
- Saudi Arabia
- Serbia
- Singapore
- Slovakia
- Slovenia
- South Africa
- Spain
- Sweden
- Switzerland
- Taiwan
- Thailand
- Turkey
- Ukraine
- United Arab Emirates
- United Kingdom of Great Britain
- United States of America

3. Do any of your customers buy ONLY ecolabelled cut flowers?

Yes

No

4. If yes please indicate (selecting as many rows as required)

i) Customer country (as per Q2 above)

ii) Market

Importer

Retailer-florist

Wholesaler

Retailer-phone/internet

Retailer-mass market e.g.
Supermarket

iii) Required ecolabel

FFP

KFC CP

FLO

MAX HAVELAAR

FLORECUADOR

MPS-A, B, C

FLORVERDE

MPS-SQ

FLP

RAINFOREST ALLIANCE

FSC

TESCO NUTURE

GLOBALGAP

VERIFLORA

ISO 14000

other (specify below)

iv) Percent of customers

1-10%

41-50%

81-90%

11-20%

52-60%

91-99%

21-30%

61-70%

100%

31-40%

71-80%

5. Do any of your customers PREFER ecolabelled cut flowers over non-ecolabelled cut flowers of the same quality?

Yes

No

6. If yes please indicate (selecting as many rows as required) excluding customers who will take only ecolabelled cut flowers

i) Customer country (as per Q2 above)

ii) Market

Importer	Retailer-florist
Wholesaler	Retailer-phone/internet
Retailer-mass market e.g. Supermarket	

iii) Required ecolabel

FFP	KFC CP
FLO	MAX HAVELAAR
FLORECUADOR	MPS-A, B, C
FLORVERDE	MPS-SQ
FLP	RAINFOREST ALLIANCE
FSC	TESCO NUTURE
GLOBALGAP	VERIFLORA
ISO 14000	other (specify below)

iv) Percent of customers

1-10%	41-50%	81-90%
11-20%	52-60%	91-99%
21-30%	61-70%	100%
31-40%	71-80%	

7. Do any of your customers buy cut flowers from you WITHOUT an ecolabel?

Yes	No
-----	----

8. If yes please indicate (selecting as many rows as required)

i) Customer country (as per Q2 above)

ii) Market

Importer	Retailer-florist
Wholesaler	Retailer-phone/internet
Retailer-mass market e.g. Supermarket	

iii) Per cent of customers

1-10%	11-20%	21-30%
-------	--------	--------

31-40%	61-70%	91-99%
41-50%	71-80%	100%
52-60%	81-90%	

9. Do you pay more for cut flowers with an ecolabel than for cut flowers of the same quality without an ecolabel?

Always (95-100% of the time)	Rarely (less than 20% of the time)
Most of the time (60-95% of the time)	Never
Occasionally (20-60% of the time)	

10. Do your customers pay you more for cut flowers with an ecolabel than for cut flowers of the same quality without an ecolabel?

Yes	No
-----	----

11. If yes please indicate % of customers who pay more for ecolabelled cut flowers

1-10%	41-50%	81-90%
11-20%	52-60%	91-99%
21-30%	61-70%	100%
31-40%	71-80%	

12. In your view, do ecolabelled cut flowers generally have better market access than cut flowers of the same quality without an ecolabel?

Yes	No
-----	----

13. Do you think any cut flower products would benefit from having an ecolabel? Please comment

14. In your view, has the demand for ecolabelled cut flowers in the last 12 months

- increased
- decreased
- remained constant

15. Do you think the demand for ecolabelled cut flowers will increase in the future?

- Yes
- No
- I don't know

16. Please add further comments about any aspect of ecolabels or this survey

Appendix B: MPS-ABC standard fees 2012

**PRICES India, Sri Lanka, Thailand, Vietnam, China, Malaysia, Australia, Russia
(Enclosure 2) MPS - ECAS**

Annual fee MPS ABC in India, Sri Lanka, Thailand, Vietnam, China, Malaysia, Australia, Russia

The costs for participating in MPS ABC consist of a **basic fee** and a **fee per hectare**.

The **basic fee** is €1805

Annual fee per ha per year:

From 0 to 10 ha	€80,00/ha		
From 10 to 25 ha	€800,00	+ €70,00	above 10 ha
From 25 to 50 ha	€1.850,00	+ €55,00	above 25 ha
From 50 to 100 ha	€3.225,00	+ €45,00	above 50 ha
More then 100 ha	€5.475,00	+ €35,00	above 100 ha

For new participants we will charge €50 administration costs.

Tariff additional services:

- Per extra registration* €100
- Request for extra qualification (except for regular qualifications) €50
- Qualification on paper (for each qualification received) €25
- MPS-ACTRES Top €245
- MPS-ACTRES Top per extra location €50
- Logo free
- Group qualification (per participant/ per year) €50,--
- Audit at participants costs as a result of a sanction (per day part) €510,--

* You can keep an extra registration per location, site or crop.

<https://www.my-mps.com/LinkClick.aspx?fileticket=WKSHyicIFAk%3d&tabid=77&language=nl-NL>

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Ecolabel scheme websites

Entwine <http://www.wfa.org.au/Entwineaustralia/default.aspx>

Ethical Trade Initiative <http://www.ethicaltrade.org/>

Fair Flowers Fair Plants <http://www.fairflowersfairplants.com/home-en.aspx>

Fairtrade <http://www.fairtrade.net/>

Florecuador <http://www.flordelecuador.org/>

Florverde <http://www.florverde.org/>

Flower Label Program <http://www.fairflowers.de/?&L=1>

Freshcare <http://www.Freshcare.com.au/>

Globalgap http://www.globalgap.org/cms/front_content.php?idcat=29

Kenya Flower Council <http://www.kenyaflowercouncil.org/>

MPS <http://www.my-MPS.com/>

Rainforest Alliance <http://www.rainforest-alliance.org/>

Veriflora <http://www.veriflora.com/>

Improved Market Access for Australian Wildflowers through Ecolabelling

By Emily Rigby & Richard Gould

Pub. No. 12/O78

This report aims to provide growers and exporters of Australian grown flowers and foliage native to Australia and South Africa with the necessary information to help them make informed choices about ecolabels available in their export markets.

The results of this project will provide wild flower and foliage growers and exporters with information to enable them to choose the most appropriate ecolabel to maintain and grow their share of international floriculture markets.

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