Scoping Study Report:

# Building Collaboration in the UK Floriculture Sector

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The Sustainable Cut-Flower Project

Promoting the value of sustainable practice in global flower supply chains

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# Building Collaboration in the UK Floriculture Sector

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# Introduction

This report has been produced for a workshop to be held at Coventry University on 24th March 2023 where stakeholders will discuss a proposal for collaboration to be formalised within the UK floriculture sector to speed progress towards sustainability goals. The workshop is the culmination of a consultation process funded by IDH, and led by a team of consultants coordinated by Just Solutions Network (JSN). This process has engaged with a wide range of stakeholders from across the industry in order to:

(i) ascertain their views as to the sustainability challenges that need to be tackled in the sector;

(ii) to assess stakeholder appetite for setting up a UK initiative.

Sustainability in floriculture and floriculture supply chains remains a prominent issue as the sector looks to build back better after COVID-19 and ensure that supply chains can adapt and respond to future challenges. During the initial phase of the COVID-19 pandemic there was a focus upon the challenges faced by the cut-flower industry. The industry benefited from support from the UK's Foreign and Commonwealth Development Office (FCDO) who funded two projects aiming to provide immediate support for stakeholders in Kenya and to examine ways of improving the resilience of the supply chains in the future. This was a key focus of the 2020 project, Building Resilience in Flower Supply Chains which was awarded a grant under the FCDO's Vulnerable Supply Chain Facility and jointly implemented by a group of UK retail, trader, academic and NGO partners. These partners included Co-op, Coventry University, Fairtrade Foundation, Marks and Spencer, MM Flowers, Tesco, Partner Africa and Women Working Worldwide.

A joint paper (Taylor et al. 2021) outlining the key findings and providing recommendations to increase sustainability in flower supply chains was produced in 2021. One of the key recommended actions coming out of this project was the formation of what was at the time entitled a 'British Covenant for Sustainable Flowers'. This was building on the ideas behind the existing Agreement for International Responsible Business Conduct in the Floricultural sector (aka 'Dutch Covenant') and the Floriculture Sustainability Initiative.

In January 2022 the project partners joined forces with IDH to consult further across the sector on this recommendation. On 20th January 2022, 60 participants, both from the UK and some from further afield, joined an online consultation event hosted by Fairtrade Foundation. The participants came from all areas of the supply chain from large retailers to florists and from growers (large and small) to distributors. The results of a poll during the roundtable showed that 100% of the participants agreed that some sort of collaboration was required for the sector with one participant from a flower company stating that "Flowers is currently uniquely disjointed." Furthermore, 64% of the participants said that they would actively engage in such a collaboration. Given this strong mandate for action, it was decided that further consultative research was required to identify what sort of 'body' for collaboration could best bring the sector together.

IDH put forward the funds for this additional research. In June 2022 Just Solutions Network, a human rights consultation company, put together a team including three members of the original FCDO project and tendered for the research contract. They were successful and over the last 6 months have undertaken a deep dive into identifying the critical sustainability issues the sector is facing and exploring collaboration within the UK floriculture sector, through a series of one to one interviews, discussions with leading actors within the flower sector and interactive round tables. This report details the outcomes from this extensive consultation process.

This report is structured as follows:

The consultation methodology is outlined. Then the key findings from that consultation are provided, focusing specifically upon the key sustainability challenges identified by stakeholders and stakeholders' views as to the benefits that collaboration could achieve within the UK sector. An outline proposal for creating a structure through which the sustainability challenges can be met is presented. The report concludes by setting out a roadmap which outlines how the process will move forward from here.

The final proposal, which will be presented at the March 24th 2023 workshop at Coventry University, has been devised following detailed discussions with the stakeholders via interviews, roundtables, phone calls and emails. The proposal is designed using a light touch organisational structure and focuses upon theme-specific Working Groups which will be tasked with driving progress on sustainability targets within the sector.

The structure has been designed to keep bureaucracy to a minimum, whilst ensuring accountability, and that the focus is upon working groups that can set the pace and drive change in key areas of sustainability.

The Floriculture Sustainability Initiative (FSI) are closely connected to this proposed initiative and will provide support in terms of access to tools and resources. In this way the working groups can catalyse from the work already undertaken within FSI and avoid duplication.

### *Setting the sustainability context for the floriculture sector*

What do we mean by sustainable? In simple language it's about people and planet. You might have heard of the Sustainable Development Goals, which are a "shared blueprint for peace and prosperity for people and the planet, now and into the future," according to the United Nations.


For the planet, this means:

- A carbon neutral future.
- Drastically reducing the use of water. Only 3% of the planet's water is freshwater. And most of this freshwater reserve is inaccessible -locked up in polar ice. So, this leaves us with roughly 0.4% of the earth's water which can be used.
- Not using "forever" chemicals or pesticides that harm insects – like vital pollinators - or run off into rivers and pollute that limited water supply.
- That's just for starters. We could also talk about plastic waste.

And for people, sustainability means sharing prosperity; it's a voice at work, enough pay to provide a modest standard of living, the right to work without harassment or the threat of violence; and the right to live and work in freedom, not in conditions of modern slavery.

Later in this report we go into more detail about some of the key sustainability challenges in the floriculture sector.

Everyone we have talked to in the flower sector, from growers to retailers, would like to feel that they can contribute to a better future for the planet and the people who grow, harvest, deliver and sell the products that are so important in customers' homes and in key events in their lives.

Increasingly, customers will expect the sector to demonstrate that it is doing its bit for people and the planet.

Meanwhile, the regulatory environment will be ramping up the requirements for companies to demonstrate they are carrying out due diligence in these key areas of sustainability.

But where does a business start? What should be the priority? How does a business measure its carbon footprint? What is the best way to reduce the use of plastic? Could there be modern slavery in the supply chain?

One company - however large - cannot, on its own, develop a response to this set of challenges.
But working together, a group of companies - working with other stakeholders - can build the critical mass and the credibility to develop the policies and tools that will convince consumers and regulators not only that the floriculture sector can manage these problems, but cares enough to do so.

This report sets out the basis from which the UK floriculture sector can firmly grasp the sustainability nettle in a collaborative way and shift the dial going forward.

# Project roadmap and methodology

The objectives of this IDH-funded project were to:

(i) to map the views and opinions of sector stakeholders and analyse the opportunities for an industry-wide sustainability partnership;

(ii) propose a workable model through which the sector can take a collaborative approach to address shared sustainability challenges.

The project has been delivered in the following phases:

## Phase 1: Inception and initial consultations

A sample set of stakeholders were interviewed by members of the JSN team with a view to ascertaining their perspectives on key issues currently confronting the sector. The following broad themes were explored within the interviews:

- What are the most significant sustainability issues confronting your business/organisation?
- What are the most significant contextual challenges facing your business/organisation currently?
- To what extent do you think a collaborative approach could assist stakeholders in meeting the sustainability challenges facing the UK industry?

## Phase 2: Collective Consultation

Stakeholders from across the industry were invited to online roundtables which were held on the 17th and 20th January 2023. The purpose of these roundtables was to:

(i) share the findings from Phase One with stakeholders,

(ii) to identify the priority areas for action with regard to sustainability;

(iii) to discuss and co-create potential models for collaborative action.

The two-hour online roundtable events, which were attended by more than 50 sector stakeholders, included a mix of presentations, Q&A and breakout groups in which attendees were able share their views verbally and by typing into an online note taking system called Padlet (see Figure 1 below). Following the roundtables, more detailed in-depth discussions took place with key stakeholders to collect their views as to how a partnership group could be most effectively configured.

## Phase 3: Implementation

A model for delivering a UK sustainability network was devised by the project team based upon the prior consultation process. This model was taken to a sample of stakeholders for 'road testing' and refinement. An event is planned for the 24th March 2023 at Coventry University to launch the scoping study report and proposal for a UK Sustainable Floriculture Network.

| Category | Totals |
|---|---|
| Trade associations | 3 |
| Professional bodies and standards organisations | 4 |
| Supermarkets | 3 |
| Other retailers and florists | 4 |
| Growers (UK) | 3 |
| Growers (Overseas) | 3 |
| Distributors and wholesalers | 4 |
| Civil society organisations | 3 |
| Worker's organisations | 4 |
| TOTAL | 30 |

**Table 1: Breakdown of stakeholders consulted through in-depth interviews**

*N.B. Multiple interviews were undertaken with different people from some organisations and some participants represent more than one category. This data is additional to that gathered at earlier engagements, round tables, discussions and events, and via the FCDO Resilience project (Taylor et al. 2021).*

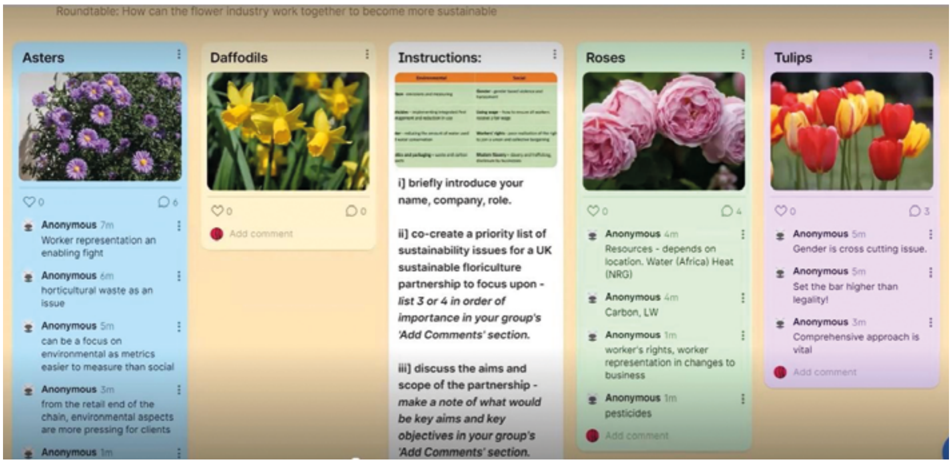


**Figure 1: Example of breakout group padlet with participant comments**

# What are the sustainability challenges in flower value chains?

Eight broad priorities (see table 2 below) were identified by stakeholders during the consultative interviews and the roundtables. These can be divided into environmental and social issues. All the issues were considered important by significant numbers of stakeholders, although certain issues were seen as of the highest priority either due to regulatory or consumer pressure. The need to better measure carbon footprints was widely seen as of the utmost importance. Stakeholders expressed a need for support in tackling all these issues, especially in relation to identifying best practice. Furthermore, some issues could be more effectively tackled through collective sector lobbying of government and regulators. Commissioning joint research projects would also enable solutions to be fast tracked for issues that require practical/technological changes to be made.

This section provides further information about each of the challenges. Firstly, a summary of how and why each issue is problematic is provided using available research sources. Secondly, there is a short summary of stakeholder's views as expressed during the interviews, roundtable discussions and breakout groups. Thirdly, indicative quotes are provided to illustrate the insights that stakeholder figures have provided. Finally, insights are provided into how climate change is creating an imperative to view environmental and social challenges as inextricably linked.


**Figure 2: Identifying lightweight packaging options is an increasing priority.**

## Carbon footprints

### *Why are carbon footprints an issue for the floriculture sector?*

Greenhouse gases, such as Carbon Dioxide (CO2), trap heat emitted from the sun and the Earth's surface thereby gradually heating the atmosphere and raising average temperatures across the planet. Such heating de-stabilises the earth's established climatic systems leading to extreme weather events, such as floods and droughts. Tackling climate change requires the reduction of greenhouse gas emissions in human activities – a process that is known as lowering carbon footprints.

Carbon footprints are a significant concern for the cut-flower industry. Detailed carbon footprinting systems have not yet become mainstream within the industry. However, some studies have indicated that carbon footprints are very high for flowers that are imported by air or are grown in heated greenhouses. For example, research undertaken at Lancaster University states that the carbon footprint of a mixed bouquet of imported and greenhouse grown flowers is 32.3KG CO2e whilst a bouquet of 15 stems grown outdoors in the UK produces 1.7KG CO2e (Berners-Lee 2020). In comparison a banana results in 0.11 KG CO2e (Berners-Lee 2020). This data is being widely quoted in media articles (Hortweek 2019) highlighting the disproportionate impacts of the cut-flower industry upon climate change.

The local and seasonal flower movement is gaining momentum in various markets, including the UK as a result of concerns being felt by some consumers. Therefore, the industry is being challenged to measure its carbon footprint more systematically and to tackle the hotspots in the supply chain where the impacts are greatest. Steps have been taken through the establishment of methodologies (Wageningen 2020) for measuring impacts within the lifecycle of a flower. But the industry as a whole has a long way to go in terms of widespread use of standardised, robust, transparent methodologies. Therefore, there are significant risks in terms of regulatory penalties and negative consumer sentiment against a product which can be deemed as 'non-essential.'

| Environmental | Social |
|---|---|
| **Carbon** - emissions and measuring | **Gender** - gender based violence and harassment and multiple forms of discrimination |
| **Agrochemicals, especially Pesticides** – implementing Integrated Pest Management, reduction in use and regulation | **Living wage** – how to ensure all workers receive a fair wage |
| **Water** – scarcity and unpredictable supplies, need for water conservation | **Workers' rights** - poor realisation of the right to join a union and collective bargaining |
| **Plastics, packaging and waste** – challenges of making sustainable choices, more regulation, consumer pressure | **Modern Slavery** – slavery and trafficking, disclosure by businesses |

**Table 2: The top sustainability challenges facing floriculture**

### *What are the main challenges identified by stakeholders?*

Carbon footprints are the main concern for most of the stakeholders consulted in this project. For retailers and wholesalers, there is pressure resulting from legislation related to reducing Scope 3 emissions, which are emissions an organisation is indirectly responsible for up and down its supply chain (see Carbon Trust, 2023). Smaller scale operators expressed a desire to better understand their own footprints so that they can legitimately market their product as low carbon or even carbon neutral.

Consumer perceptions are increasingly important for many stakeholders. Therefore, there is a recognition that the sector as a whole needs to reduce its carbon footprint. In order to do this, businesses need to be able to **access reliable methodologies for calculating the impacts** within different parts of the supply chain so that they can, in turn, implement strategies for reducing the footprint. **Access to cost-effective technologies** to support the transition to lower carbon production is also required. Not all businesses are able to invest time and resources into R&D activities. Therefore, **information sharing** across sector platforms would be beneficial.

"Our carbon footprint is a huge one at the moment. So establishing what the carbon footprint is of our own sites. And we're now looking at the carbon footprint of key products within the group. So I think it's our roses, chrysanthemums, alstroemeria and tulips... So, we're starting to do like a life lifecycle analysis of those four products. That's a big one." **Distributor**

"We also want to look at sea freight, how do we get good quality fresh flowers, over sea rather than by air, which will mean a 90 to 95% drop in our carbon footprint. That'll be huge." **Distributor**

"So, in order to be sustainable, we need to be carbon neutral. We've got no way of calculation because there isn't a system in place yet that gives us that." **Florist**

"The environmental aspects with regard to carbon calculation are the most pressing issues for our clients." **Event florist**

"We do carbon footprinting for our annual audits… it is certainly not total lifecyle analysis…it would be good to have a comparative tool that we can rely on because everyone's using different calculators." **UK grower**

"If you are a grower in UK, Kenya or Holland your carbon footprint needs to be calculated in a way that it is credible, that is validated and everyone can use to work on reductions and to make sure that our climate footprint as a sector is better." **Dutch industry representative**

"How do you balance carbon and livelihoods? And it's awful that those two become competitors." **Distributor**

## Agrochemicals

### *Why are agrochemicals an issue for the industry?*

Chemicals are widely used in cut-flower production in order to promote growth and to reduce the negative impacts of pests and diseases. Market demands for high quality, uniform and unblemished flowers is one of the factors driving the use of chemicals. However, agrochemicals generate a number of problems.

Firstly, workers on farms, packhouses and in floristry can be exposed to chemicals which affect their health. Typical problems include: neurological disorders, breathing problems and decreased fertility. A 2018 report (Kenyan Woman 2018) revealed that over 10,000 workers, mainly women, fall sick each year due to unsafe, unhealthy, and unsustainable work and workplaces in the Kenyan flower industry. Women are disproportionately affected (Tsimbiri et al. 2015) due to the types of jobs they do, for example, weeding and harvesting, which are high risk activities. Whilst research in Belgium showed that florists can be exposed to levels of chemical residue that will impact upon their health.

Secondly, the health of communities living near flower farms can be affected. For example, a study in Ecuador (UCSD Today 2017) revealed that local children exhibited increased neurological impairments during the peak pesticide spraying season for Mother's Day.

Thirdly, rivers and lakes can be contaminated with negative impacts upon water organisms.

Fourthly, pesticides can reduce the fertility and health of soils.

As flowers are not food products there are less stringent requirements and testing on maximum residue levels (MRLs). A meta-study revealed that more than 200 chemical compounds have been found on cut-flowers including a number that are banned in flower importing countries (Pereira et al. 2021). Whilst Toumi et al. (2017) found 104 pesticides in glove samples used by Belgian florists, including 20 compounds banned in the EU.

As a result of these problems, there are many initiatives to promote low chemical usage via techniques such as Integrated Pest Management (IPM). The industry in the UK and EU relies on standards and certifications as a mechanism for assuring legal and appropriate use of chemicals.

*What are the main challenges identified by stakeholders?*

Stakeholders expressed concerns about agrochemical usage in the sector and recognised that further steps need to be taken to make the most efficient usage of chemicals to negate negative impacts.

As a **non-food product** cut-flowers do not tend to be subject to the same restrictions and export/importing testing regimes as food products. This means that there is more scope for overuse and misuse to occur. People also talked about the need to more widely implement low input forms of production such as **Integrated Pest Management** (IPM). Differing chemical licensing regimes in different countries can also be challenging.

***Indicative stakeholder quotes:***

"Pesticides are damaging to the environment and damaging to people that apply them or can be if they're not applied according to good agricultural practices. So, from a risk to the people who are trading in them, it's to reduce pesticides wherever possible, and primarily undertaken through IPM, integrated pest management processes and biological controls that are becoming much more widespread within the industry." **Wholesaler**

"For pesticides, there's very clear rules and regulations. Now, whether they're always adhered to is a second matter." **Online retailer**

"So, in the Netherlands, we work with a group called The Pollinators to see how we can help with improving the population of bees and other pollinating insects. We have similar initiatives in France and the UK." **Online retailer**


Figure 3: Sea freight's lower carbon footprint is appealing to many exporters.

Figure 4: Flower dyes can leak into the environment

Figures 5 & 6: IPM techniques are helping reduce pesticide usage

## Waste, packaging and plastics

*Why are plastics, packaging and waste significant challenges for the industry?*

Waste is an issue at all points within the supply chain, from the initial phase of production through to disposal by the consumer. There are many types of waste, ranging from organic waste in the form of the flowers themselves through to cardboards and plastics used in packaging. Research in Columbia has shown that up to 40kg of waste per month can result during the production of a hectare of roses (Idrovo-Novillo, J. et al. 2019). This is less of a problem in cases where the organic matter is composted but this is not always the case. In 2015 it was estimated that 34,700 tonnes of flowers were consumed and subsequently entered waste streams in the UK (Petrou, K.N. & Iacovidou, E. 2015).

There are positive examples of organic flower waste being used to generate electricity via biogas production in Kenya and India (Petrou, K.N. & Iacovidou, E. 2015 ). But ensuring that a greater proportion of organic flower waste enters effective composting routes remains a significant challenge.

There has been rapidly increasing awareness of the devastating impacts of plastics upon the natural environment in recent years. The flower industry has its own weak spots in relation to plastic usage. For example, bouquet wrappings tend to be made from non-recyclable plastics and floral displays commonly use floral foam to hold stems in place. Floral foam has been shown to cause pollution in terrestrial and aquatic environments (Trestrail, C. et al. 2020). An increasing number of florists are seeking alternatives to floral foam, as even versions marketed as 'bio' do not necessarily biodegrade effectively unless disposed of in very specific ways.

### *What are the main challenges identified by stakeholders?*

Plastics, packaging and waste management are significant areas of concern for many stakeholders, especially those that are **directly consumer facing**. A significant segment of the consumer base has become more attuned to the need to reduce such plastics and packaging and expect waste to be reduced wherever possible. In addition, the **regulatory environment** is increasing pressure on firms to work towards more **circular product cycles** with minimal waste and greatly reduced usage of plastics and other forms of packaging. However, there is much confusion about exactly what the **best options** are, so it is not always easy to make environmentally sound choices.

***Indicative stakeholder quotes:***

"Plastics obviously has been a huge focus for us both in terms of consumer end packaging, and incoming plastics, which will be more of a focus for next year, and trying to reduce that within the supply chain." **Distributor**

"And packaging is especially something that the UK customers really care about." **Supermarket**

"Plastics and packaging are very important for the consumer." **Anonymous stakeholder in Roundtable event, January 2023**

"The biggest things are obviously carbon, living wage and packaging. That's not withstanding, there's a whole host of other risks that are notably sitting behind - biodiversity, water loss, different forms of renewable energy." **Distributor**

"I think everyone's so focused on flowers that they forget everything else - the human rights and environmental due diligence around that like the cardboard and deforestation perspective." **Distributor**


**Figures 7 & 8: reducing plastic use is a priority in the floristry sector.**

## Water

### *Why is water an issue for the industry?*

The production of flowers can have problematic impacts upon water resources. Firstly, flowers can require large quantities of water in order to grow successfully. It has been estimated that a single rose stem can require between 7 and 13 litres of water during its production (Mekonnen et al. 2012). Floriculture water consumption in Ethiopia has been estimated at around 60,000 litres of water per day, more than triple the figure for Colombia (Belay 2014). Furthermore, technology for using rainwater harvesting systems was largely absent, leading to usage of surface and groundwater stores (Mebat et al. 2021). Such usage is referred to as the 'water footprint.'

Secondly, flowers are often grown in areas of water scarcity which can result in conflicts with other water users, such as food growers and local communities.

Thirdly, the usage of agrochemicals can result in pollution of water bodies, which damages local ecosystems and affects drinking water quality.

Variable weather patterns resulting from climate change are exacerbating these problems and increasing risks. Technologies for more efficient use of water are being trialled and implemented within the industry.

### *What are the main challenges identified by stakeholders?*

Water is seen as an issue of concern by many stakeholders as some floriculture supply chains are located in **water scarce areas**, whilst others are located in areas that are prone to increasing risk of droughts (and floods) due to **climate change**. Understanding the precise water risks is seen as a challenge. Furthermore, **water pollution** resulting from chemical run off is another issue related to water. Stakeholders are keen to better understand the risks in different areas of production and to implement technologies that promote more **efficient water usage**.

**Figure 9: Pump extracting water from an on-farm dam**

***Indicative stakeholder quotes:***

"They do a lot of work with water and water retention. I know that's one of our other big sustainability things over in Kenya. You know, the lack of water, and how we're going to keep the crops going." **Supermarket**

"In terms of the environment, yeah, it's water, biodiversity and climate. So, SDGs: climate action, life on land and water. And yeah, they, of course, they filter throughout our operational model, obviously, the biggest risk is typically in the growing of the flowers." **Online retailer**

"We're developing our work on water at the minute. So that's why we're quite keen to understand about irrigation and things like that." **Supermarket**

"… climate change and all of that can spiral from, for example, loss of a water source, and suddenly an entire sector of flowers can go down the drain." **NGO**

## Gender

### *Why is gender an issue for the flower industry*

Gender inequality and discrimination are continuing challenges in all sectors, but especially in agricultural settings such as flowers, where many workers are women, some on short-term contracts, forced to work overtime and frequently working in isolation in fields or greenhouses. Issues can range from representation and how wages are paid (Kelly 2017), to safe transportation and childcare access, with Gender Based Violence and Harassment (GBVH) being serious problems affecting women (and men) in the workplace.

Whilst GBVH is most commonly perpetrated by men against women it can also be intersectional, so discrimination, harassment and violence also occur for reasons such as different genders, sexuality, age, colour, caste etc. Sexual harassment can take the form of verbal or physical sexual advances made by someone (or a group of people) which are unwelcome or offensive to the worker(s) involved and make them feel threatened, humiliated, patronised, or harassed. In most cases the harasser has the power to punish or reward based on his/her occupational status. It is an expression of power.

GBVH is likely to be present in the whole supply chain. At the grower and distributor level it can be fuelled by actions such as last minute changes to orders, increased overtime during peaks, and short term contracts. These practices put women at risk as it can disrupt family life and childcare, and they can be forced to work overtime or offer sexual 'favours' in return for work. Retailers, distributors, suppliers, and growers need to ensure their own operations are in order and need to work together to prevent and mitigate these unacceptable infringements of basic human rights.

Exposés of GBVH in global supply chains highlight this failed responsibility to worker welfare.
In addition to regulatory infractions, they also risk the sustainability of the supply chain and consumer/investor confidence. For example, a recent BBC investigation into 'Sex for Work' in the tea sector in Kenya (an important country for flower production) was described by Fairtrade as a "#metoo moment for tea" which needs to "spark a global movement for the entire agricultural system" (Grocery Gazette, Bayford 2023). Harassment can interfere with workers' health and wellbeing, performance, undermine job security and creates a threatening and intimidating work environment. So this is a serious problem for the worker, the rest of the workforce, for the company and the whole sector.

### *What are the main challenges identified by stakeholders?*

Themes discussed by participants in relation to gender often interrelate and overlap with other sustainability challenges identified in this project. One was **health and safety**. There is a need for training and protective equipment, especially for types of work more often undertaken by women. The use of chemicals and pesticides can have detrimental health impacts, including on reproductive health.

Secondly, the organisation of work, in terms of its (in)flexibility and lack of facilities such as nurseries, is seen as challenging since women are more likely to have caring responsibilities that conflict with employer demands. Relatedly, **wages** and the need for a living wage was recognised as disproportionately impacting women as they are most represented in the lower paid jobs in the sector. This was also mentioned in relation to the high proportion of women involved in the floristry and small-scale flower growing sectors in the UK.

Finally, there was acknowledgement of **sexual harassment** and how differentials in the roles that women and men are most often employed in on large-scale farms can create gender related power imbalances in governance structures. Ineffective grievance mechanisms were also discussed as a related challenge.

In addressing these challenges, retailers and distributors (large and small) expressed the desire to have **greater visibility** down the supply chain and that mapping of Tier 1 and Tier 2 suppliers/growers is essential in order to have due diligence. Certifications and standards give a basic level of company compliance to agreed standards and awareness of some issues such as the gender split in the workforce. However, there needs to be much more granular gender detail provided within captured data such as numbers of female supervisors, migrant workers, short term contracts and number and results of grievance complaints. This data can then be used to measure the impact of the actions being undertaken by growers to tackle issues such as GBVH.

Growers recognised the need to **engage with unions and women's rights organisations** to ensure that women's voices are heard, but were also worried about reputational damage should this engagement expose wrongdoing and impact on their competitive advantage. Increasing the representation of women in the company was another avenue retailers and growers were exploring. Many companies have a target to fill 30% of management and supervisory roles with women. However, this brings its own need for recruitment, support and training of all workers, men and women, and at all levels.

***Indicative stakeholder quotes:***

"Sexual harassment and gender based violence, it's a priority for us in cut flowers. [Where the] majority of the workforce are women." **Trade union**

"Gender based violence in the supply chain is just global and endemic… It's unsustainable, but it's also immoral." **Trade union**

"Tackling Gender Based Violence is a key priority for us." **Supermarket**

**Figure 10: Women are frequently at risk of abuse in the floriculture sector.**

## Living wage

### *Why is living wage an issue for the flower industry?*

Many workers in the cut flower supply chain are not paid a living wage. A living wage is defined by the International Labour Organisation (ILO) as "the payment to the employed of a wage adequate to maintain a reasonable standard of life as this is understood in their time and country" (ILO 2017, p.6). This should be earned during legal working hour limits.

A living wage is not the same as a minimum wage which is the minimum amount in law that an employer can pay. These are set by some governments. Sometimes they are revised annually, as in the UK, by an independent commission. In other countries, there can be a gap of years between increases and not all countries even have a minimum wage. Globally, the average gap between minimum wages and the living wage is 48.5% - and this has increased in recent years (The Industry We Want 2023). So, paying the minimum wage is not sufficient to guarantee a reasonable standard of living.

The Global Living Wage Coalition prepares calculations for a living wage for particular sectors and locations. For example, the living wage in Lake Naivasha where many flower farms in Kenya are based, in April 2022 was estimated to be KES 32,488 (USD 276) per month. The minimum wage in Kenya was increased late in 2022, and the lowest rate now is KES 15,652.62. However, many Kenyan flower farms struggle to pay their general workers, the majority of whom are women, even the minimum wage, leaving many families living in in-work poverty.

Trade unions argue that the best way to set wages is through collective bargaining and think that better progress would be made if the rights of workers to join trade unions was enabled. An important landmark in the campaign for living wages in agricultural supply chains is the recent agreement of nine UK supermarkets to reach living wages in their banana supply chains by 2027. Dutch, Belgium and German supermarkets also have similar agreements (Parr 2023).

### *What are the main challenges identified by stakeholders?*

**Wage levels are low** and this was a significant issue raised by a number of stakeholders, both in terms of being a problem but also in terms of needing to build on work already being done. It was seen as an area already established as a sustainability threat, but still needing to be addressed. It was acknowledged that low wages are a reputational challenge, and seen as a **human rights issue**. The other aspect is that low wage levels can lead to high turnover and low worker commitment to the business.

The discussions mostly focused on the need for a living wage and the challenges of implementing this, rather than disagreement over whether this should be an objective. There also seemed to be a general understanding of what a living wage is.

Indeed, there was a common acknowledgement that non-payment of a living wage is a problem in the flower industry. This was already documented in the FCDO funded investigation into resilience in flower supply chains during the pandemic, finding that "without living wages, many workers lacked the savings required to bolster their resilience in the face of COVID-19 in 2020" (Taylor et al. 2021: 2).

However, some retailers and growers said that they would **struggle to pay a living wage** as the margins were so low on flowers that consumers would not pay much more for supermarket flowers. However, Fairtrade calculated that it would be a minimal add-on cost to a bouquet. A bouquet is made up of multiple items from different growers, so the issue of fair price distribution to growers for a bouquet (flowers, foliage and fillers) is important. This would allow growers to pay better wages to workers in their supply chains. There was also concern expressed **not to duplicate efforts** already being made on these complex issues, that these efforts needed to be understood and where possible, lessons learnt from other industries too.

***Stakeholder quotes:***

"Living wages in East Africa – we need to close the gap." **Supermarket**

"The work on living wage is a challenging one we've put our toe in, that's what we want to aim towards. But as you know, no one's really hit that in the horticulture industry." **Supermarket**

"Labour shortages are not helped by low wages. A sustainable cut flower sector needs a stable workforce, which earns rewarding wages."
**UK civil society**

## Workers' rights

### *Why are workers' rights an issue for the flower industry?*

The treatment of workers in supply chains can rather paradoxically become both more hidden and more transparent due to globalisation. On the one hand, businesses can often now source labour (and materials) from sites around the world. With distance no longer the same challenge it once was, the separation both culturally and proximally between those people growing products and those consuming them is increasing (Stringer, Payne and Mortimer 2021). On the other hand, labour rights scandals, exposés, the rise of ethical consumption and climate crisis awareness serve to promote lines of connection and responsibility between consumers and workers (Adams & Raisborough 2008).

The rights of workers in flower supply chains and their fair treatment has become an integrated part of many certification schemes designed to ensure levels of good practice. Again, it is difficult to untangle workers' rights from other key sustainability challenges. For example, labour rights are inherent in the health and safety issues raised by some agrochemical use. The right to a safe environment was seen to encompass equal treatment regardless of gender or other characteristics, access to basic needs such as clean water, and the impacts of climate change.

A challenge for the flower industry when it comes specifically to workers rights is that of Freedom of Association (FAO) - the right of workers to form and join organisations of their own choice, without interference from their employer. These organisations should be able to represent workers on issues like wages, health and safety, working hours, grievance and discipline handling. This is seen as an enabling right and essential for workers' ability to exercise their right to decent work. It is recognised in international law as a fundamental human right. However, in some flower growing countries, such as Colombia, trade unionists meet with systemic attempts, including extreme violence, to suppress their activities (Lieber 2012 and Feingold 2019).

The ILO reported that in 2021, 109 countries impeded the registration of unions, and identified an increased trend in government and business surveillance and intimidation of union leaders and members in other countries (ITUC 2021). The University of Nottingham Rights Lab, a leading centre of expertise on modern slavery, also identified FOA as a factor in preventing new forms of slavery, (Trautrims et al. 2022).

From the business point of view, trade unions and collective bargaining have a lot of advantages. Trade union members are more loyal (ETI 2015). Collective bargaining usually provides predictability and certainty. Workers committees and similar structures are sometimes put forward as a substitute for trade unions, for example where some groups were being unrepresented or where there are legal restrictions on their operations. However, these can become limited in scope to satisfy social auditing requirements rather than the best available form of independent worker organisation.

## Value chain of a rose

How a rose with retail price of 50p is divided up along the value chain

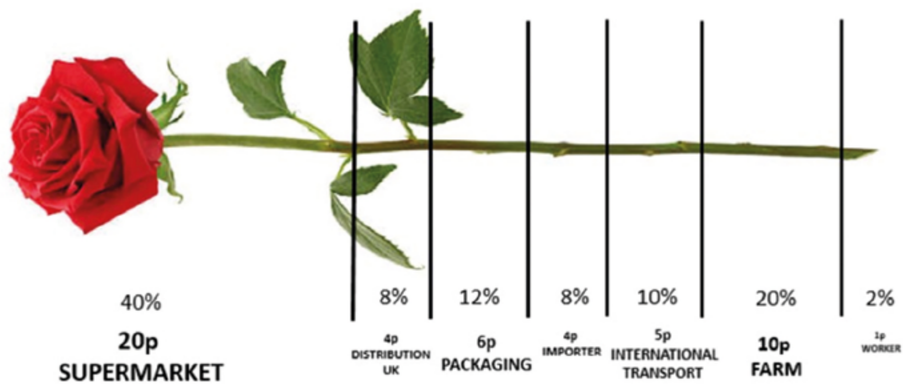


**Figure 11: how value is distributed along the supply chain.**

*Estimated calculation of value distribution of a rose. Source: UK trader in Bek and Timms (2021: 17)*

### *What are the main challenges identified by stakeholders?*

This issue was identified and described in several different ways by some of the stakeholders who participated in this project. **Obstructions** were seen to come from governments and employers that sometimes prevent flower workers establishing independent workers' rights groups and from joining trade unions. The **lack of representation or voice** can lead to other problems such as discrimination against certain types of workers, poor health resulting from a lack of training on pesticide use, or sexual harassment where power imbalances exist.

***Stakeholder quotes:***

"Maybe at the centre of all of that is the idea of worker representation. And can we think about that as either an overarching theme or a top priority, an enabling right." **Auditing and standards body**

"Workers' rights are a priority because the violation of the right to freedom of association and collective bargaining leads to many other problems." **Trade union**

## Modern slavery

### *Why is modern slavery an issue for the flower industry?*

Slavery is a relationship, not a thing. In the 21st century, slaves are not put up for sale like in the 18th century. But, if a person acts as a slave owner, exercising control over another person, and preventing them from leaving that relationship – by coercion, or deception, violence or the threat of violence - including the threat of violence on their family living in another country for example – then that is slavery.

The Modern Slavery Act (2015) consolidated all "existing offences of human trafficking and slavery and encompasses trafficking for all forms of exploitation," so offering an encompassing definition that was the first in the world to do so. Globally, there are approximately 27.6 million people forced to work in modern slavery (ILO 2023). Agriculture is one of the sectors where modern slavery in known to be a problem. Gangmasters and Labour Abuse Authority (GLAA) has identified flowers as a potential risk area for modern slavery (GLAA 2020).

Although we do not know how many people are living in slavery in the UK, "in the year ending March 2021, there were 8,730 modern slavery offences recorded by the police, a 5% increase from 8,354 in the year to March 2020 in England and Wales" (Gov.UK 2021). This is likely to be the tip of the iceberg but shows how modern slavery is not a distant problem only of concern for global supply chains, but also for UK businesses and farms. For example, the GLAA Industry Profile for Agriculture (2020) identified Lincolnshire, Cornwall and Somerset as examples of UK flower growing locations which could be a risk.

### *What are the main challenges identified by stakeholders?*

There was an awareness of the risks of modern slavery to both UK and global flower supply chains, as set out above. **Significant fluctuations in demand** for products around certain dates and seasons can put increased pressure on growers and create the need for highly flexible access to labour.

In particular, the **supply of daffodils** was mentioned as a concern, often being a loss leader with the price of the £1 per bunch not changing for many retailers year-on-year. The challenge was also mentioned that the **recruitment of foreign workers** has become more complicated since Brexit, so can give rise to further risk.

It was recognised that there is ongoing prevalence for **certain geographies to be hotspots** for such issues, and these were not restricted to the UK. Furthermore, the majority of legislation, such as the **Modern Slavery Act 2015**, places the onus on businesses themselves to perform due diligence.


**Figure 12: Modern slavery is linked to people trafficking which can involve using flower industry logistics.**

***Stakeholder quotes:***

"Outside of the UK, it was quite shocking to hear that in terms of modern slavery the UK is seen almost worse than Colombia." **Trade union**

"Modern slavery… is absolutely a huge focus of a lot of our work. And I'd really like to see a group …being able to support supplier capacity building that's specific to this sector, and at times of year and seasonal peaks, which other product categories don't have to contend with." **Supermarket**

"This year has been the worst year for social in the UK when it comes to agriculture that I've seen in terms of the actual visible impacts of potential modern slavery, forced labour exploitation." **Supermarket**

"Like, for instance, daffodils like is a huge, huge, modern slavery risk. It is hugely labour intensive, the margin on the product is extremely tight. And flowers in general is just like an unseen sector in a way. It just drives itself into the modern slavery area. I have growers in the UK that pose much more of a risk to me than many growers in Colombia." **Distributor**

## Climate change as an overarching factor

The challenges of climate change are making clear the reality that environmental and social issues are inextricably linked. This linkage manifests in many ways. For example, variable rainfall regimes resulting from climate change will not only cause more intense challenges for flower growers but will also cause problems for the communities around the farm. Who will get priority access in cases of extreme shortage? Similarly, pressure to improve environmental indicators, such as lowering carbon footprints will require greater investments which in the short-term could reduce funds available for pay rises or worker welfare schemes. Therefore, it is vital that these challenges are viewed holistically and not treated as single issues that can be solved in isolation. Hence, carefully coordinated work is required to ensure that this holistic oversight is maintained.

***Stakeholder quotes:***

"The incentive to work on climate change is more about just the fact that we're facing a global crisis. It exacerbates all other impact areas that we're also concerned about whether it's poverty, or biodiversity or water scarcity. All these other types of interlinking issues that just on a global scale will get massively exacerbated if climate change goes unchecked." **Supermarket**

"And we've actually made a concerted effort not to divide it…we will talk of climate change as a human rights issue. Because for a very long time, climate change is relegated to an environmental issue, but we talk about the human impact of climate change." **NGO**

**CLIMATE CHANGE**

| Environmental | Social |
|---|---|
| **Carbon** - emissions and measuring | **Gender** - gender based violence and harassment and multiple forms of discrimination |
| **Agrochemicals, especially Pesticides** – implementing Integrated Pest Management, reduction in use and regulation | **Living wage** – how to ensure all workers receive a fair wage |
| **Water** – scarcity and unpredictable supplies, need for water conservation | **Workers' rights** - poor realisation of the right to join a union and collective bargaining |
| **Plastics, packaging and waste** – challenges of making sustainable choices, more regulation, consumer pressure | **Modern Slavery** – slavery and trafficking, disclosure by businesses |

**Table 3: Climate Change requires a holistic perspective.**

# Contextual challenges

It is important to be cognisant of the wider challenges which are impacting operators within the floriculture sector, whether a large farm in Kenya, a medium-sized retailer, a UK flower grower or a small florist in a market town. Whilst the sector has always faced external challenges, these have heightened in the last three years since the onset of COVID-19 and the Russian invasion of Ukraine. These factors both increase the pressure upon businesses but at the same time act as a spur to increase resilience and reduce risk. Here we outline the main such challenges that people identified during our interviews and roundtable events.

- **Consumer demand volatility** – this has been a particular issue since the onset of the COVID-19 pandemic in 2020 and has been further fuelled by the impacts of the cost of living crisis.
- **Cost of living crisis** – many consumers have less money in their pockets and therefore have been cutting back on discretionary spends. Finding the right price points has been crucial for retailers and florists.
- **Energy prices** – have not only impacted consumer spending but have had major impacts upon production and logistics costs.
- **Legislation regarding social and environmental impacts** – firms are facing increasing pressures to take responsibility for risks within their supply chains. Therefore, transparency and traceability are becoming increasingly important.
- **Flowers as a non-essential** – whilst many in the flower industry would argue otherwise, there is a view that flowers are not an essential item. Therefore, negative sustainability impacts are less acceptable than for essentials such as food production.
- **Limitations of standards and certifications** – standards and certifications that operate mainly as a compliance process to ensure access to markets may not drive systemic improvements to sustainable business practices.
- **Identifying what best practice looks like in terms of sustainability** – for many stakeholders mitigating sustainability risks is difficult as there is a lack of reliable information about the true impacts of innovations. Do some of the products and technologies on the market really reduce negative impacts? Greenwashing is a concern.
- **Highly competitive and transactional industry** – the industry is very price sensitive and levels of competition can lead to a race to the bottom which prevents long-term investments in social and environmental upgrades.
- **Lack of support in UK for cut-flowers** – the floriculture sector is not as strongly represented as other sectors in the UK, or as compared with sector representation in other countries, such as the Netherlands, and therefore lacks a strong lobbying voice.

***Indicative stakeholder quotes:***

"It's definitely been probably one of the harder years I guess, since I've been involved in flowers, both from a kind of supply point of view, but also from a supply point of view. But also demand point of view is particularly volatile." **Supermarket**

"So, we've had additional economic uncertainty and already a cost of living crisis, and then high prices for what is essentially, of course, (flowers are) discretionary products. There's a lot of tension in the industry… Current threats for us are the price of energy. So, a few growers have actually stopped growing because of energy costs… Kenya is super, super expensive at the moment as well, which is, again, impacting our sourcing strategy." **Wholesaler**

"I think the CMA (Competition and Markets Authority) or ACM (Authority for Consumers & Markets) in the Netherlands, they will get more and more strict on how you substantiate essentially when you label something as sustainable or if you talk about your sustainability, which I think is fair enough, it just means that we have to be very clear in what it is that we mean or how we think something is more sustainable." **Supermarket**

"How do I measure sustainability? What does sustainable floristry look like and who would be the partners potentially that I might want to include in order to take the reference steps?" **Florist**

"They're (some carbon footprinting consultants) essentially greenwashing. They're basically saying come and spend 5 grand of your hard earned cash and we'll give you something that we don't even know is fit for purpose. So you definitely won't know and what you get out of the end of it might not be worthwhile. I just feel like I'm just being taken for a ride." **Florist**

"Because floriculture traverses farming and horticulture, we don't have a clear umbrella of where we sit." **Professional Body**

## Lack of UK Government support for the sector

Often related to the above point about the sector being neglected, were comments about a lack of interest and support from the UK Government. Notably, this was made by a whole range of stakeholders, from small scale UK growers to large retailers. Not only were points made about a lack of financial support for investment, such as in schemes to promote the growth of UK flower farming, there were also complaints about the recognition of potential sustainability benefits, such as from biodiversity. These were seen as recognised for other types of farming, but not flowers. A lack of a clear route for working with the government was identified as a constraint. So, without collaboration as an industry, there are few mechanisms to lobby for improvements and work towards further recognition of the benefits and value the UK flower sector does, and could, bring.

***Indicative stakeholder quotes:***

> "We get treated very badly within the UK, we don't get any help, financially or other… there's no one in the NFU (National Farmers Union), there's no one at DEFRA (Department for Environment, Food and Rural Affairs), there's no one in government, who deals with protecting ornamentals or flowers."
> **UK Grower**

> "The UK is uniquely challenging due to the fact that we don't have backing outside of business and industry to move these things along." **Supermarket**

## Working individually does not work, it needs to be together

Another important theme was the recognition that even when efforts are made to overcome the challenges of sustainability in the flower sector, doing so unevenly or at the level of a single organisation does not work and can be counter-productive. A clear message was that without collaboration there is a real risk of duplicating efforts, of pulling in different directions and of some being left behind, potentially leading to reputational risk for the whole sector. The issue of duplication of efforts was a particular concern, which might partly be explained by the fact that the stakeholders who engaged with this research are aware of the importance of sustainability for the sector. Many have already been involved in discussions and actions on particular topics, even if only at a firm level, and many have seen first-hand that there is a lack of joined up thinking across within the UK flower sector.

This has led to a recognition of the need to work together rather than individually. Working together was discussed as not only overcoming the problems identified with working individually on sustainability challenges, but collaboration was also seen to strengthen the potential for enhancing the sustainability of the sector. Expertise, experience, good practice, innovations, enthusiasm and coordinated approaches can be shared and further achieved by working together. It should be noted that there were also concerns over working together as more issues can be brought to the table and the experiences of some stakeholders may not be relevant to others. However, there was also recognition that working together is also the way to present a united front for the sector, to facilitate effective lobbying and also to work to promote the value of flowers – all of which were seen to benefit those in different parts of different supply chains.

***Indicative stakeholder quotes:***

> "Can be difficult to do because people are having different conversations... Everyone coming up with their own ways of doing things." **Standards Organisation**
>
> "Different retailers go off at different tangents… everybody working together really is key." **Supermarket**

> "It's good to collaborate… I just think pooling resources is really important so we're not all pulling in different directions." **UK Grower**
>
> "An association that would support in the journey of sustainability, then I think that, that in itself would be a hugely valuable membership." **Florist**

### Collaboration needs to be inclusive along and between different supply chains

Related to the theme above, of working together rather than individually, was a recognition that collaboration needed to be sector wide and inclusive. We collected input from diverse stakeholders from small-scale UK growers and florists to large retailers and importers, as well as other related organisations such as professional associations, NGOs, trade unions and standards organisations – so incorporating those involved with or advocating for those working at different nodes along supply chains and those within different types of supply chains. These could be seen as on a continuum of complexity. For example, a small-scale florist/grower may be involved in very short and local supply chains from their field direct to consumers or via a local florist, whereas large retailers or distributors may be involved in supply chains from multiple countries and farms, with pack sheds, transportation hubs, auction houses, distribution centres, wholesalers and retail space being nodes along the chain.

Whilst the different issues these different chains can present and all those that fall within the continuum were recognised, there was also discussion of the need for collaboration to be inclusive and to value the participation of different types of stakeholder. A gap was identified here in that some existing efforts focused on one part of the sector or only involved those in the same types of chains, so a UK orientated multi-stakeholder initiative was lacking. The benefit of learning from others, having counter voices and new perspectives were also seen as benefits of this inclusivity. Although some needs and issues can be particular to a supply chain's specific context, many underlying sustainability challenges are shared and an inclusive approach to addressing them as an industry needs to include collaboration along, and between, supply chains.

***Indicative stakeholder quotes:***

"We especially need a UK multistakeholder group for exchange of knowledge and understanding complexities." **NGO**

"It needs to target different sectors of the market." **Florist**

"[NGO involvement] is always a good benchmark,… they are actually really looking to cover broad industry needs for more environmental and social standpoints." **Supermarket**

## Now is the time for collaboration

The final key message on collaboration was clear from many of the participants. The time to collaborate is now and that collaboration needs to be action-oriented. Two strands of thinking around this can be identified. One concerns the urgency of the need for change. This was expressed in a number of ways, such as: growing reputational risk on issues like modern slavery, gender discrimination and carbon footprint; the need to lobby for the sector in a unified way; the move towards increased governmental regulation of many sustainability factors; growing consumer awareness and concern around sustainability; the impact the climate crisis is having, and will have, on the sector.

Secondly, a real opportunity was seen in acting now due to the alignment of goals and the lessons learnt during the COVID-19 pandemic. This was apparent in the FCDO Resilience Project (Taylor et al. 2021), when this crisis created an urgent need for more collaboration between stakeholders in the flower sector, especially around communications and knowledge sharing in highly volatile times. The benefits this brought in those circumstances were recognised, but also there was concern that it can be harder to keep this up in the longer term. Interestingly though, an opportunity was seen to build on the foundation of this collaboration borne out of crisis to create ongoing collaborative relationships for the benefit of the sector.

***Indicative stakeholder quotes:***

"It's only now that they sort of realize [the urgent need]." **NGO**

"Similar to the COVID pandemic, we're in this period where there's uncertainty, … and the outcome of that was this need for a more unified front, to kind of insulate us against future pandemics or climate crisis." **Standards Organisation**

The clear message from this interaction is that collaboration is very much valued, even if acknowledged as not being straightforward. It was recognised by our participants that the floriculture sector in the UK has been neglected, is behind compared to other agricultural goods in terms of sustainability progress and also, lacks support from, or even clear routes to, Government interventions.

The type of progress needed is seen as not possible on an individual basis and so a collaborative approach can bring benefits and help contribute towards building a more resilient sector, as well as providing lobbying opportunities and the promotion of the value of flowers for the benefit of all stakeholders. Furthermore, inclusive collaboration is seen as important and there is an imperative for such an inclusive approach to be initiated as soon as possible. Taking these points together, leads us to the next section of this report on what our research and interactions with stakeholders brings us to conclude about how this collaboration could potentially work.

# Proposed framework for sector collaboration

The proposed framework takes the following into consideration:

- priorities and challenges raised during stakeholder consultations
- diverse needs of the UK floriculture sector from small scale growers and florists to large growers, distributors, and retailers
- the need to avoid duplication with existing initiatives
- the sense of urgency to quickly mobilise and take action
- expertise, areas of added value, and capacity of IDH and the Sustainable Cut-Flower Project to take convening roles.

While recognising the need for collaboration, a common theme during our consultations, we also recognise that different players in the supply chain have different priorities, needs and capacity.

The roundtables and interviews allowed the full range of ideas of how to take the idea of a UK Floriculture Sustainability Network (UK FSN) forward. Many of the smaller growers and florists want a network to include a focus on the issues they face and that are specific to the UK, whilst retailers and major distributors were often focused on large scale global interventions. Both affect floriculture supply chains, and the reputation, value and impact of the sector in the UK and as a whole. Therefore, the working groups and provision for UK small growers and florists as well as retailers and distributors needs to be incorporated into the vision for a UK FSN.

## A UK Sustainable Floriculture Network

Rather than set up an umbrella platform with a formal governance structure, the proposed UK Sustainable Floriculture Network (UK SFN) would allow supply chain actors to collaborate with NGOs, unions, certification bodies and academia to accelerate progress on specific sustainability topics. Network members would do this though through action-oriented thematic working groups.

The network would not have a formal membership requirement or structure. Participation would be via the working groups.

The working groups would allow diverse actors within the sector to come together around key topics members prioritise.  Each working group would define its own specific ambitions related to one of the eight priority topics highlighted in this report and work toward achieving this ambition.

There are already some offers to convene and support working groups from IDH and the Sustainable Cut-Flower Project, which is co-led by academics at the universities of Coventry and Surrey. There would be an opportunity for others to offer facilitation on other topics they prioritise and regular communication between the groups would be encouraged.

We suggest that working group members would undertake these activities:

1. Define a goal.
2. Align on methodologies and toolkits aligned with global standards and best practices.
2. Collect data.
3. Develop and agree on targets.
4. Take action and invest in-kind, in-cash and pursue funding sources.
5. Advocate with supply chain stakeholders on policies and regulations that tackle the issues.
6. Support and invest in capacity building across the supply chain to enhance the ability of partners to make the necessary transitions.
7. Benchmark UK standards to the FSI basket of standards criteria for better measurement and alignment, and to support due diligence processes.
8. Publicly report the impact of this work in their supply chain and share lessons learned.
9. Engage in cross-learning opportunities with FSI, the other working groups and other UK based ethical and social trade bodies.

The role of the Floriculture Sustainability Initiative

The framework also considers the role of the Floriculture Sustainability Initiative (FSI), which defines itself as “a market-driven initiative that brings together members of the international floriculture sector.” It’s primary role has been to promote the uptake of social and environmental certifications within the flower industry as a means to keep the sector future proof. FSI also acts as an important convening hub for its members so that work can be undertaken on priority themes. As a result of such work, a range of tools have been developed which FSI members can draw upon to improve their own sustainability practices and outcomes. FSI is a facilitator for these activities but does not do the work on behalf of companies or the sector as a whole. The onus is members to be proactive and collaborate.

Currently, FSI’s global membership includes the largest suppliers to the UK mass market and some UK e-retailers. It does not currently include any UK supermarket chains or UK-based growers.

For current FSI members, participation in the UK SFN would not change what members are doing under their FSI commitments but build on it for the UK market.  Members of the UK SFN would not need to belong to the FSI, however they are also welcome to join FSI if they so choose.

In support of the UK SFN, and depending on the options chosen for its initial thematic topics, FSI could:

- Provide access to tools, methodologies, and lessons from its engagement on relevant topics.
- Support the benchmarking of UK sustainability standards to ensure alignment with the FSI basket of standards.
- Support its members with a connection to the UK market on using FSI approved tools and methodologies on carbon foot printing and living wage, and other topics in which their members may make commitments through a UK FSN working group.

## Network Membership and Roles

UK retailers, suppliers, florists and growers to the UK floriculture market would be the key UK SFN members, working in partnership with other stakeholders including NGOs, trade unions, certifiers and standards bodies, and academia. Members would agree to work collaboratively to identify baselines, set targets and drive action within their supply chains. Members would also benefit from collective insights and cross-learning opportunities within the network. Domestic growers and florists will bring their UK specific expertise and knowledge to the Network and benefit from work which prioritises the challenges that they directly face. International growers, distributors and retailers will be able to share their progress on tackling the key issues facing the sector through their local and global supply chains.

The role of the IDH

A key activity of IDH is to convene, co-create, and co-finance sector initiatives that enable business and other stakeholders to tackle systemic challenges related to "better jobs," "better income," and "better environment."

This includes being a convenor and one of the major donors to enable the start-up process of FSI, with which IDH continues to actively collaborate. Other examples that address topics relevant to the floriculture sector, such as working conditions, living wages, carbon footprints, and pesticides are the Sustainable Fruit and Vegetables Initiative and retailer commitments on living wages for the banana sector, among others.

IDH could use its expertise, sector relationships, and existing resources to drive and convene one or two working groups on issues related to its "better jobs" and "better environment" themes.

In support of the UK SFN, and depending on the options chosen for its initial thematic topics, IDH could:

- Convene members to agree roles and responsibilities, annual plans and goals, set targets and timelines, ways of working, and reporting structures.
- Provide information on and facilitate access to tools and methodologies.
- Share expertise and lessons from IDH's work and case studies both from floriculture and other sectors.
- Coordinate regular meetings and consultation with stakeholders including certifiers, NGOs, trade unions, and academia.
- Support delivery of programmes to address the issues identified for the working groups though co-financing.
- Convene meetings of all UK SFN members, including those not convened by IDH, at least annually to ensure alignment, review progress, and share lessons learned.
- Facilitate cross-participation between the UK working groups and relevant FSI working groups to share lessons, best practices, and facilitate collaboration and alignment with FSI.

## Duration and Timelines

We suggest that the initial UK Sustainable Floriculture Network and the working groups commit to operating until 31st December 2025. UK SFN meetings of all working groups would take place at least once each year. In the final year, members will review the model and structure to determine whether and how the Network should continue to operate.

## Funding

Funding and in-kind support, depending on working group themes, could be a combination of:

- Staggered membership fees
- IDH in-kind and project co-investment funding
- FSI in-kind support
- Support from Sustainable Cut Flower Project
- Development of funding applications through all eligible partners (NGOs, Universities, etc.)
- Specific project funding via companies

Working group members will decide on appropriate costs for set projects and where these funds will come from. For example, the costs of implementing working group activities within member companies or supply chain operations, such as data collection, would be borne by the company or grower. For project work related to IDH themes, companies may apply to IDH for co-financing at a ratio of 30% IDH contribution and 70% private sector contribution. All working groups will be encouraged to work with NGOs and Universities to unlock potential funding pots to progress activities.

## Roadmap: moving forward together

Through this scoping project, members of the UK floriculture supply chains and related stakeholders revealed an eagerness to take more collaborative and coordinated action to improve sector sustainability for people and planet. There is an acknowledgement across the supply chain that the future viability of the sector is at risk if the issues highlighted in this report are not urgently addressed.

Consultees also made clear the challenges they face in addressing these issues either as a single company, or as a single type of actor without support from the rest of the supply chain and other stakeholders.

To kickstart joined-up action to tackle these issues, a UK Sustainable Floriculture Network, with the support of IDH and other potential partner organisations, and in collaboration with FSI, can accelerate progress on focused topics. While it is not feasible to directly address all eight sustainability challenges from the outset, the interrelated nature of many of them mean that starting on one area will inevitably lead to opportunities for more holistic progress. The intersection between gender, working conditions, and living wages is but one example highlighted in this report.

From the evidence gathered back in 2020 and the exhaustive consultations undertaken in this research process it is concluded that the sector can now take the next steps to form and join the UK Sustainable Floriculture Network. The precise route for formalising this journey will be discussed at the workshop on 24th March 2023 and will be confirmed with stakeholders shortly thereafter.

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