Governance restructuring in the cut flower trade in France and its impacts on the producers in developing countries

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GOVERNANCE RESTRUCTURING IN THE CUT FLOWER TRADE IN FRANCE AND ITS IMPACTS ON PRODUCERS IN DEVELOPING COUNTRIES

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ABSTRACT

The objective of the paper is to examine how retailers play a powerful role in shaping the governance in cut flower trade in France. Global Value Chain analysis has been used to explain why a distribution system originally based on spot markets has been replaced by tightly integrated supply chains. It allowed an exploration of the consequences of these changes on the structure of the value chain and the inclusion and exclusion of different agents in the chain. Fieldwork were carried out between 2007 and 2008 in France and in Holland with 22 chain participants including supermarkets, franchise florists, traditional florists, importers, wholesalers, institutions and freelance consultants. Traditional florists have always been the main retail channel for cut flowers in France. However, since 1990`s share of traditional florists has been reduced sharply by entry of new channels and therefore this market became much more consolidated. In the 1990`s supermarkets began to sale cut flower and rapidly they was accounted 15% of the market. More recently, the consolidation of market have been reinforced by the emerging of franchises florist chains. French franchises and supermarkets have been bought directly in developing countries such as Kenya, Uganda and Colombia. Each retailer has developed its own value chain control system. The retailer-importer relationship has been moved towards the relational pattern, whereas the importer-producer relationship displayed the characteristics of a captive linkage. These importers acquired new functions, moving beyond a `trading' role toward a more active position in the management of the value chain. They have assumed responsibility for developing new sources of supply, supporting developing-country producers and monitoring their performance. The product and process parameters changed also the roles of producers, forcing them to acquire new technical knowledge of production as well as on close ties with researchers, breeding companies, and importers. Demands for capital and technical capacity had led to the exclusion of many small producers that were unable to meet requirements. This exclusion was initially evident in the France, but then it also has reached all the major African cut flower exporting countries such as Kenya and Uganda. Production has moved away from small growers to large farms, many of which are owned by the Dutch importers. The small producers that have remained in the value chain have been organized into grower organizations with a high degree of control by the importers.

Keywords: Developing countries, International trade, Governance structure, France, Cut flower.

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1 - INTRODUCTION

The aim of this paper is to present a consideration of how large retail channels are playing a powerful role in shaping the governance structure of the cut flowers trade in France. The international cut flower trade provides a valuable case study through which to examine the power of retailers to shape global chains. Such developments relate to the globalized nature of these links, where flowers being retailed and consumed in Europe are increasingly being produced in developing countries (Hugues, 2000; Witmer, 2003; Evans, 2005; Ghénasia, 2005; Silvis and Bont, 2005; Jourdhier, 2006 ; Widehem and Cadic, 2006)

While the Netherlands retain a pivotal role in the cut flower trade today, the last thirty years have seen the entrance of a number of other countries into the realm of production (Maharaj and Dorren, 1995). The production of cut flowers in developing and emerging countries was improved by new marketing channels, independently of the influence of Dutch floral auctions. These changes led to the emerging of a new reorganisation of the cut flowers flows between North and South hemispheres (Pedroza Filho and Coelho, 2008; Widehem and Cadic, 2006).

France is the third biggest market of cut flowers of Europe. Traditional florists dominated up French retail trade until the early to mid-1990s. In the 1990's supermarkets began to sale flowers but despite their important increasing, their share remains stable at 15%. However, in the later 1990`s franchise florists chains emerged in France, and they have cut dramatically into the market share of the traditional florists. Between 1998 and 2008, the share of the French cut flower market, by volume, taken by the franchise florists increased from 2% to 26%. Between the same years, the share held by traditional florists decreased from 59% to 38%.

The distribution channels used by traditional florists to source this product involve a variety of agents. Flowers would be passed in their country of origin to an exporter and then typically sent across to one of the Dutch auctions to be sold on to an importer in France. Then, the flowers might have been sold to a wholesaler, reaching the florists for final sale. While most of these links are still maintained in the supply chain for flowers sold by traditional florists, the new retailer channels have recently begun to forge much more direct connections with the growers by a fully integrated marketing chain.

The objective of the paper is therefore to examine how French retailers play a powerful role in shaping the relationships between consumption and production. To do this, I analyse the France cut flower trade from a global value chain perspective. In section 2 we present the concept of governance in value chains and then, in section 3, we explain why the cut flower trade in France has changed and we discuss the consequences of this change for the structure of floricultural production and distribution in France and in developing countries. I then consider, in section 4, the possible outcomes of two current trends in the French floriculture industry: the increasing of direct sourcing by large retailers and the concentration on wholesalers/importers.

2 – KEY ISSUES IN GOVERNANCE STRUCTURE OF GLOBAL VALUE CHAINS

This paper is based on literature of governance on global value chains (GVC). This approach considers the key issues influencing the relationships between buyers from developed countries and suppliers in developing countries. The emphasis is given to the efficiency of co-ordination mechanisms between buyers and suppliers. The cut flower chain has much in common with GVC, in the sense that its dynamics are frequently dictated by buyers in the developed world, including retailers and trading organizations.

GVC analysis has been used to explain why interfirm governance structures arise. Jones et al (1997) argue that frequent, complex, and customised exchanges, time pressure, and asset specificity make markets inefficient, but they provide two reasons for firms to continue outsourcing, even when these problems arise. In situations of demand uncertainty, maintaining independent suppliers provides flexibility and avoids obsolescence, as long as competent suppliers can be found. Further, networks enable firms to mobilise specialised assets and complementary competences which buyers may find difficult to develop or manage cost-effectively (Dolan and Humphrey, 2004).

GVC analysis takes this argument a further step forward by recognising that this governance can take different forms. Humphrey and Schmitz (2002) suggest that the level of resources that have to be put into governance are related to the complexity of the information that has to be transferred between firms for a transaction to be realised and to the competence of suppliers in relation to the specific tasks required of them by the transaction (Dolan and Humphrey, 2004).

This line of argument was taken a step further for Gereffi et al (2005) that provide a typology of governance forms and an explanation of their determinants. In addition to the complexity of information and the level of supplier competence, the extent to which information can be codified is introduced as a third variable. It is argued that in addition to the market and the firm (hierarchy), which represent the lowest and highest degrees of coordination, respectively, there are three forms of network governance, termed modular, relational, and captive value chains. The five cases are explained as follows:

- Market - spot or repeated market-type inter-firm links characterized by low informational complexity, ease of codification of information and high supplier capabilities; both parties' costs of switching to new partners are low.
- Modular - Typically, suppliers in modular value chains make products to a customer's specifications, which may be more or less detailed. However, when providing 'turn-key services' suppliers take full responsibility for competencies surrounding process technology, use generic machinery that limits transaction-specific investments,
- Relational - When product specifications cannot be codified, products are complex, and supplier capabilities are high, relational value chain governance can be expected.
- Captive - In these networks, small suppliers are transactionally dependent on much larger buyers. Suppliers face significant switching costs and are, therefore, 'captive'. Such networks are frequently characterized by a high degree of monitoring and control by lead firms.
- Hierarchy - classical vertical integration; characterized by high informational complexity, difficulty of codification and low capabilities among independent suppliers.

The salience of governance structure more verticals in retailing has placed new pressures on value chains and raised the capabilities required of suppliers. At the same time, the search for new, low-cost, sources of supply in the global economy leads to the incorporation of new suppliers that are expected to meet requirements that frequently do not apply to their domestic markets (Keesing and Lall, 1992). This creates a gap between the capabilities required for the domestic market and those required for the export market.

3 –RETAILERS, INTERNATIONAL COMPETITION AND TRANSFORMATION OF CUT FLOWERS TRADE IN FRANCE

3.1 – Methodology

This article is informed not only by secondary data sources, but also by preliminary fieldwork on the links between cut flower production in developing countries and retail in France. Fieldwork were carried out between 2007 and 2008 in France and in Holland, and it's incorporated face-to-face interviews with 22 supply chain participants including supermarkets (2), franchise florists (3), traditional florist holding (2), importers (2), wholesalers (2), institutions related to the sector (5), and freelance consultants working in France, Holland, Brazil, Uganda and Ecuador (6).

The work reported here was initially undertaken in the field work of an MSc dissertation carried out in Brazil, which currently has been extended to a PhD thesis in France.

3.2 - Pre - 1990s

Decreasing of traditional florists

Traditional florists have always been the main retail channel for cut flowers in France. In the 80-90's this channel traded 80% of cut flowers in France. According to VINIFLHOR[2] in 1997 there were 11.600 traditional flower stores in France. Traditional florists are characterized by holding a large range of flowers and handmade bunches ensuring a personalized product. In more, quality is better that other outlets like supermarkets, and service is more personalized with *Fleuristes traditionnels* making customized bunch.

Until the 1970's flowers were supplied by wholesalers linking dispersed French producers to *Fleuristes*. These wholesalers were located generally in the large wholesale markets. Large wholesale markets like *Rungis* received flowers sourced from the mains production regions in France[3]. Market-type was the main governance structure and inter-firm linkages were characterized by low informational complexity, repeated transactions and low costs of switching to new partners for both wholesalers and producers.

During early 1970's Dutch producers began to sale cut flowers to traditional florists in France. When Holland began selling cut flowers in France these too were sold through wholesale markets. These channels created relatively few barriers to entry of Dutch flowers and rapidly French production suffered the impacts. According to CFL (date not informed) between 1972 to 1977 surface of roses cultivation in France decreased by 670 to 580 hectares, and in 1978 France was already the second largest importer of cut flowers from Holland. Bellow, I'll to give more concerns about fall of French production.

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[2] VINIFLHOR - French professional office of fruits, vegetables, wines and horticulture.
[3] The mains production regions of cut flower in France are PACA, Var, Loire and Paris region.

However, since 1990`s share of traditional florists has been reduced sharply by entry of new channels in the sale of cut flower in France[4]. In the 1990`s supermarket began to sale cut flower and rapidly this channel was accounted 15% of the market. More recently, another channel has contributed to reduce the share of traditional florists – the franchises florist chains. Below, I will to analyze these two channels separately.

Emerging of supermarkets retailers

In France, supermarkets involved in the cut flower business increased their importance in 1990's. Supermarkets relaunched global consumption selling standardized cheaper bunch, and therefore cut flowers became more popular in this channel. Nevertheless, the market share of supermarkets has been remains stable at 15% during the last few years (Widehem and Cadic, 2006).

When the first supermarkets like Carrefour and Auchan began to sale cut flower in France, they too purchased product from wholesale market. However, market-type governance placed certain constrains on the supermarkets. Fragmented production combined with wholesale market distribution channels, provided flexibility, but it also meant that the French supermarkets were unable to specify product, process, or logistics parameters along the chain. The mixing of produce by wholesales meant that they could not exercise any control over the type or quality of wholesale markets. Further, the supermarkets had not any control concerning the maintenance of prices and consequently organization of anticipate sale campaigns were difficult because production could not be scheduled in advance.

This situation drove large retailers to search more established supplies, notably in Holland. Supermarkets carried out more vertical relations to Dutch importers trading principally imported cut flowers from Africa and South America. The supermarkets bypassed the wholesale markets and worked directly with Dutch importers, delegating lower-profit functions such as quality control, monitoring and distribution to these importers.

The French supermarkets also extended a year-round supply of products. It was also important to maintain quality as consistent as possible. The supermarkets took the lead in deciding which new products would be brought to market and how inputs and knowledge from various sources would be mobilised for use in the value chain. For example, recently Carrefour Market (supermarket chain owed to Carrefour Group) created a segment of small tropical bunches in France. This has created not only a new product segment but also a whole new supply industry from stores in France into production in Cameroon (Interview with buying responsible of Carrefour Market, December, 2008).

[4] The trend in reducing of traditional florists face competition to large retailers has also verified in others countries in Europe. Hugues (2000) argues that between 1986 and 1995, the share of the United Kingdom cut flower market, by value, taken by the large supermarkets increased from 4% to 30%. Between the same years, the share held by traditional florists decreased from 47% to 24%.

Decreasing of the French production

As mentioned above, French production began its decline in early 1970's when Dutch producers began to sale cut flowers to French traditional florists. In the 1990`s the decreasing of French production was enforced by international competition. Therefore, French cut flower production has decreased by 5.2% annually between 1998 and 2003, and share of total sourcing by domestic production has decreased from 40% to 10% between 1998 and 2008 due to the sharply increasing of imports.

A weakness of French floricultural producers is principally due to the lack of cooperation in the sector. Only about 10% of the producers are part of cooperation organization. Widehem and Cadic (2006) and Emery (2006) relate that the lack of focus and specialization, the fragmented structure and increasing production costs are others causes of the deterioration of the competitive strength of the French floricultural sector (Jourdhier, 2006). This has led to a decreasing number of cut flowers producers on approximately 5% annually. From 1980 to 2004 about 75% of the growers disappeared (see table 1).

Table 1 – Number of cut flower producers in France

Year	1980	1989	1992	1998	2004
Number of producers	7900	5820	3870	2665	2046

Source: Jourdhier (2006); Oniflhor (1998b).

Small French firms have many difficulties to supply the large distribution channels such supermarkets and franchises. Achieve requirements of the purchasing centers of large retailers is a condition to access these channels. However, requirements in terms of logistic, size of orders, quality standards and packaging are difficult to achieve for small and middle firms working individually. This situation is one of the factors that explain why approximately 90% of the French consumption comes from abroad. Currently, only some cooperatives like SICA Hyères[5] has been selling cut flowers to supermarkets.

3.3 – Consolidation on specialized florist retail sector in France: 2000's

In France, the florist stores still constitute the main distribution retailer channel for cut flowers accounting 64% of the market. This share of florists in France is more important than in the other European countries. The weakness in sales of the supermarkets (only 15%) explains this situation.

Table 2: Mains retails channels of cut flowers in France, 1998 and 2008 (% of total sales in volume).

Channel	1998	2008
Traditional florists	59	38
Franchise florists	2	26
Supermarkets	12	15
Street vendors	12	7
Garden centers	6	6
Others (Producers, e-commerce, etc.)	9	8
Total	100	100

Source: VINIFLHOR and field work (2008).

[5] The SICA Hyères flower market, with an annual turnover of € 45 million, is the largest cooperative of cut flowers in France. The Hyères market has two trading systems: auction sales, through three clocks, and contract sales.

Cut flower trade in France has been characterized by a very fragmented market. However, since the later 90's important transformations have been carried out and in this market became more consolidated. Beside of supermarkets, others retails channels have emerged and competitiveness has been arise. Currently, franchise chains became one of the most important retail channels of cut flowers in France.

Franchised florists

Franchise chains in the cut flower trade are typical for the French retail sector. They are increasingly dominating the flower market as well, thereby pushing traditional flower stores out of the market (see table 2). The franchise's organization is based on a network of stores, linked to a purchasing center. The purchasing center realizes important functions: to consolidate orders by stores, to optimize logistic flows and, consequently, to increase power at price negotiation. This structure requires some heavy investments. Therefore, some of the largest groups, such as *RapidFlore* and *Monceau Fleurs*, opened their ownership in Paris market stock in order to obtain the necessary capital.

Competition in French market encourages franchises to strengthen expansion of stores. A increasing in number of stores enables to take more customers and raises buying power of distribution center by a biggest concentration of demand. Therefore, franchises have developed also in others countries such as Spain, UK, Luxemburg, Japan and Russia.

Tableau 3 – The mains franchise florist chains in France[6], 2008.

Franchise	Platform location	Number of stores in France	International stores	Turnover (€ million)
Monceau Fleurs	France and Holland	132	10 (Luxembourg, Guadeloupe, Guyana, Portugal, Japan)	75
Happy	France and Holland	33	-	n.a.
Rapidflore	France	182	10 (Belgium, Spain, Italy, Luxemburg, Andorra and Portugal)	63
Le jardin des fleurs	France and Holland	98	4 (Czech Republic, U.K, Spain, Luxembourg)	60
Au nom de la Rose	n.a.	46	15 (U.K., Belgium, China, Spain, Greece, Italy, Lebanon, Kuwait, Russia)	n.a.
Oya	France	75 (whose 55 associate florists)	1 (Maroc)	3
Un été à la campagne	France	25	-	n.a.
Le bouquet Nantais	Holland	18	-	n.a.

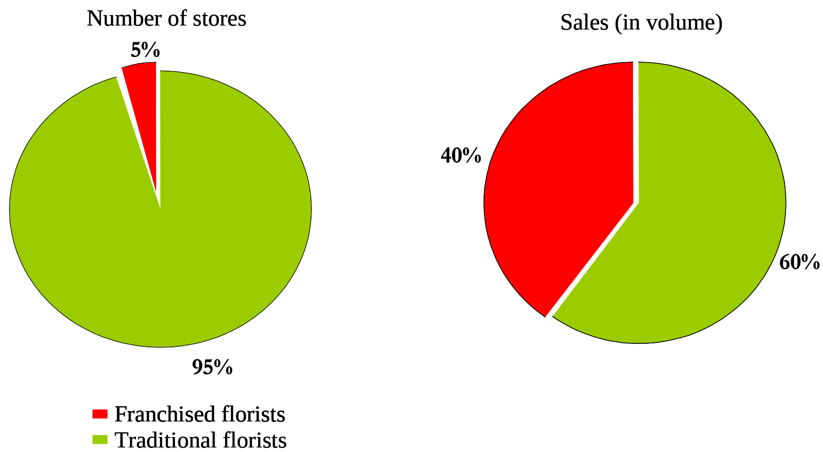
Source: Field Work.   n.a. = not available.

The total of florist stores (traditional and franchises) in France is 12.000. Results from fieldwork show that despite franchises own only 5% (570) of the total stores, they account already 40% of

[6] Others smaller franchises such as Aquarelle (9 stores) and Fleurs d'Auteuil (7 stores) also have been developed in France.

the total sales of the florist sector in 2007. It is explained because the average turnover at one franchise florists is eight times greater than the average spending across one traditional florist.

Figure 2 - Share of florist sector between traditional and franchised stores – France, 2007



Source: Field Work.

Beyond franchise, another structure composed exclusively by individual traditional florists has been created since about 2006's. It's called traditional florist holdings (TFH). This holding joins traditional florists working individually, and their aim is to concentrate sourcing from a purchasing center that regroups orders from members. The model is the same of franchise, but members of the traditional florist holdings (TFH) remains independents in terms of marketing and management of their stores. Currently, the two largest TFH are *Artisans Fleuristes de France* (200 members) and *Artisans Fleurs* (55 members).

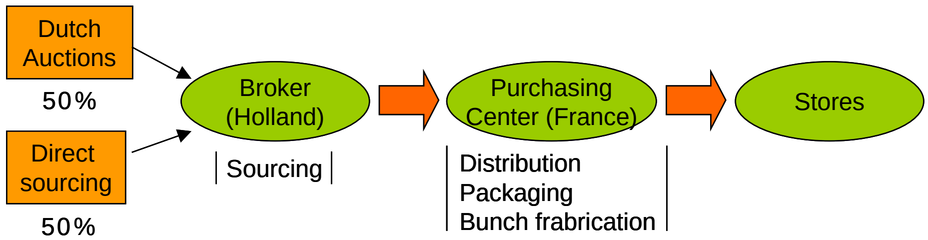
Sometimes TFH`s works in partnership with a franchise in order to reduce buying prices by sharing of the sourcing structure. This is the case of *Artisans Fleurs* that use the purchasing center of the franchise *Oya*. For *Artisans Fleurs* it enables to profit services and lowest prices offered by the distribution center, and for *Oya* it allow a reduction on operation costs of the purchasing center (Interview with the Buying responsible, *Oya* Franchise, November 2008).

The case of Monceau Fleurs: the world leader in the retail distribution of flowers

Monceau fleurs has been one of the first companies developing franchise concept in cut flower trade in France in 1998's. Monceau Fleurs Group which develops the MONCEAU FLEURS and HAPPY brands, announced in 2008's the acquisition of the Rapid'Flore franchise. The acquisition of Rapid'Flore will enable Monceau Fleurs Group to become the world leader in the retail distribution of flowers, with close to 400 stores in France and worldwide.

Monceau Fleurs success is based on the strategy of low cost pricing with bouquets price starting at 3 euros. It has cut out all middlemen and currently half of stock is purchased directly from growers worldwide. The rest is purchased in Holland by their own broker at the flower auctions (see figure 3). The purchasing center in Paris allows add value to flowers by fabrication of bunch and packaging.

Figure 3 – Sourcing structure of Monceau Fleurs



Source: Fieldwork, 2008.

Direct sourcing enables Monceau Fleurs to reduce flower price and also to improve quality by individual standards. Purchase contracts with producers from Colombia, Kenya and Costa Rica avoids variation in price along of year and, consequently, allows maintenance of fixed prices in stores which contribute to establish customer loyalty.

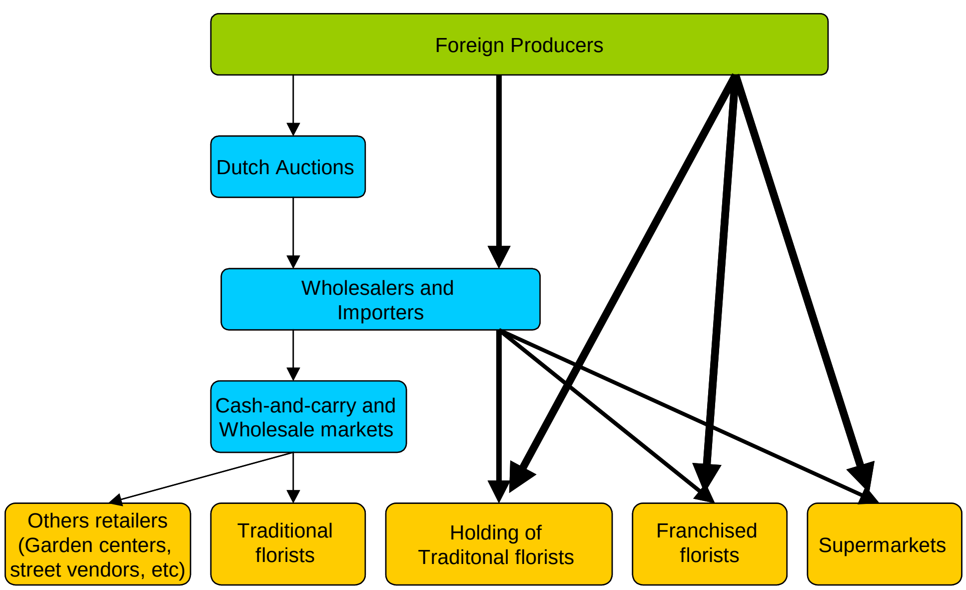
4 – RESHAPING THE CUT FLOWERS VALUE CHAIN IN FRANCE

Increasing of direct sourcing by large retailers

French franchises and supermarkets have been bought directly in developing countries such as Kenya, Uganda, Costa Rica and Colombia. Importation has been realized through a Dutch importer ou directly from the distribution centers of these channels. There are three main reasons to explain why these retailers have strategically developed fully-integrated supply channels, identified by managers interviewed in French retail chains:

- To cut out the costs associated with using surplus commercial agents along the chain;
- To increase control over logistic process and price variations;
- To integrate producers in quality standards process.

Figure 4 – Marketing channels of cut flowers in France, 2008.



The introduction and the enforcement of product and process requirements was achieved by restructuring relationships within the value chain, for instance, by changing the nature of firms included in the chain and the tasks they performed. This meant developing tighter linkages between French retailers and Dutch importers and African and South American growers. As the relationships between actors in the chain became more complex, they also became more exclusive (see figure 4). The supermarkets and franchises began to work directly with a limited number of Dutch importers with whom they established long-term relationships, sometimes formalized in contracts. Each supermarket/franchise source from a range of approximately six different importers. Some of the largest and most significant suppliers of cut flowers to the French retailers, which have become locked into this fully-integrated supply channel, are based in Kenya.

The importers acquired new functions, moving beyond a `trading' role toward providing a broader range of services and assuming a more active role in the management of the value chain. They have assumed responsibility for developing new sources of supply, supporting developing-country producers and monitoring their performance. The product and process parameters of French supermarkets/franchises changed also the roles of producers, forcing them to acquire new capabilities. Product and process innovations depended on sophisticated technical knowledge of production as well as on close ties with researchers, breeding companies, and importers.

Demands for capital and technical capacity had led to the exclusion of many small exporters that were unable to meet requirements. This exclusion was initially evident in the France, but then it also has reached all the major African cut flower exporting countries such as Kenya and Uganda. Production has moved away from small growers to large farms, many of which are owned by the Dutch importers. The small producers that have remained in the value chain have been organized into grower organizations with a high degree of control by the importers. Several large Dutch importers began to acquire their own growing capacity, with an increasing number centralizing production on their own estates.

Concentration on wholesalers/importers

Fieldwork shows that these wholesalers have been becoming more concentrated and are increasingly cooperating in order to profit from economies of scale. Therefore, holdings have been created by large importers and wholesalers. These holdings are focused on consolidation of demands by retailers, on optimising of logistic and transport process, and also on vertical integration in production in developing countries. These holdings have been too active in France either supplying large retailers such as supermarkets and franchises or supplying smaller wholesales and cash-and-carries. The two largest holdings of importer/wholesalers are *Mondial Flower International* and *Dutch Flower Group*[7].

Sometimes, between the importers and traditional florists there is another agent called “Cash-and-Carry”. Cash-and-Carry are small or middle wholesalers working with permanent stocks. Cash-and-Carry carried out demand of traditional florists, characterized by small quantities, specific

[7] Dutch Flower Group is a holding company comprising 25 independent operating companies in the Netherlands and abroad. DFG is the world leader with a turnover of 800 millions euros in 2007.

quality and large range of flowers. However, some wholesales such as *Agora Group* have been bypassing French Cash-and-Carries either through selling directly to traditional florists or establishing their own Cash-and-Carry. These wholesalers deliver flowers from Holland directly at the stores. For this, some wholesales have the keys of the store in order to displayer the flowers in the early hours, before the store opening (Interview with Dutch Wholesaler, May 2008).

5 – CONCLUSION

In this paper, GVC analysis has been used to explain why a distribution system originally based on spot markets has been replaced by tightly integrated supply chains. Value chain analysis allowed an exploration of the consequences of these changes on the structure of the value chain, the distribution of functions within it, and the inclusion and exclusion of different agents in the chain.

The driving force behind the restructuring of the value chain has been the rise to dominance of a small number of large retailers in France cut flower retailing. It has been shown that French supermarket and franchises (and more recently, holdings of traditional florists) exercise a decisive influence over all stages of the value chain, despite the fact that they do not take ownership of produce until it is delivered to their purchasing centers. Changes in value chain structuring governance arose in part from the supermarket/franchises requirements in year-round quality, supply regularity and control over flower price.

The information requirements for the value chain had become much more complex and resources were being invested in specifications of systems and monitoring of performance. Each retailer has developed its own value chain control system. The retail-importer relationship moved towards the relational pattern, whereas the importer-producer relationship displayed the characteristics of a captive linkage. The producers were transactionally dependent upon their Dutch importer and subject to rigorous control. The new governance helps French retailers to effectively achieve control along the chain.

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