

**Voluntary Report** – Voluntary - Public Distribution

**Date:** March 24, 2026

**Report Number:** CO2026-0004

**Report Name:** Colombian Flowers and the American Market After Six  
Decades of Growth

**Country:** Colombia

**Post:** Bogota

**Report Category:** Agricultural Situation

**Prepared By:** Alvaro Ortega

**Approved By:** Andre Bradley

**Report Highlights:**

Colombia's cut flower industry has grown into a \$2.4 billion export sector, supplying approximately 60 percent of flowers sold in the United States. However, in 2025 the imposition of global tariffs introduced uncertainty for an industry that sends nearly 80 percent of its production to the American market.

## Executive Summary

Colombia's cut flower industry has grown into a \$2.4 billion export sector over six decades, supplying approximately 60 percent of flowers sold in the United States and employing more than 200,000 people across over 115 municipalities. The U.S.-Colombia Trade Promotion Agreement (CTPA), in effect since May 2012, provided the duty-free market access that underpinned this expansion, helping nearly double export values and more than double employment. However, the industry now faces an unprecedented convergence of pressures. The 10 percent tariff imposed in April 2025 — the first U.S. duty on Colombian flowers in over a decade — is estimated to add more than \$200 million in annual costs to the sector; it is compounded by a 23.7 percent minimum wage increase and a nearly 12 percent appreciation of the Colombian peso against the dollar. At the same time, Colombia's longstanding competitive advantage in the U.S. market could shift as new bilateral trade agreements between Washington and other flower-exporting nations take hold.

## I. Introduction

On October 18, 1965, Edgar Wells shipped the first commercial load of cut flowers from Bogota to Miami, a consignment worth \$20,000. Sixty years later, Colombia is the world's second-largest exporter of cut flowers and the dominant supplier to the United States, with exports valued at \$2.4 billion in 2025. What began as a USAID-era experiment in non-traditional agriculture, nurtured by Kennedy's Alliance for Progress, has become one of Colombia's most important economic sectors and one of the most successful examples of agricultural free trade in the Western Hemisphere.

The industry's growth has been especially pronounced since the CTPA took effect in May 2012, eliminating tariffs on Colombian flowers entering the U.S. market. In the years since, export values have nearly doubled, employment has more than doubled, and Colombia has consolidated a market share that now accounts for roughly 60 percent of all U.S. flower imports. But the trade landscape shifted abruptly in 2025 when U.S. duties were reintroduced on Colombian products for the first time in over a decade.

This report provides a comprehensive assessment of the Colombian flower industry: its scale and economic footprint, its deep integration with the U.S. economy, its growing sustainability credentials, and its challenges.

## II. Industry Overview: Scale and Economic Footprint

The Colombian flower industry is a major pillar of the country's agricultural economy. It creates more than 200,000 formal jobs across over 115 municipalities, making it one of the most significant sources of rural employment in the country.<sup>1</sup> The sector is a particularly important employer of women, who make up the majority of the workforce in the greenhouses that dot the highland plateaus surrounding Bogota and the Rionegro Valley near Medellin. These workers, often drawn from low-income rural communities, earn the monthly minimum wage and support extended families, making the industry a critical social anchor in the regions where it operates.

Colombia cultivates over 10,000 hectares of flowers, ranking first globally among exporting countries, ahead of the Netherlands at 7,870 hectares, Ecuador at 7,467 hectares, Kenya at 4,039 hectares, and Ethiopia at 1,695 hectares.<sup>2</sup> Production is concentrated in two principal regions: Cundinamarca, the department surrounding Bogota, accounts for approximately 70 percent of output, while Antioquia, centered on the Rionegro Valley near Medellin, contributes 28 percent (Figure 1). The remaining production is scattered across central and western

Colombia. There are roughly 300 farms producing flowers for export, split roughly evenly between operations of 20–50 hectares and those exceeding 50 hectares.

**Figure 1. Main Colombian Flower Producing Departments in 2025 (Ha)**



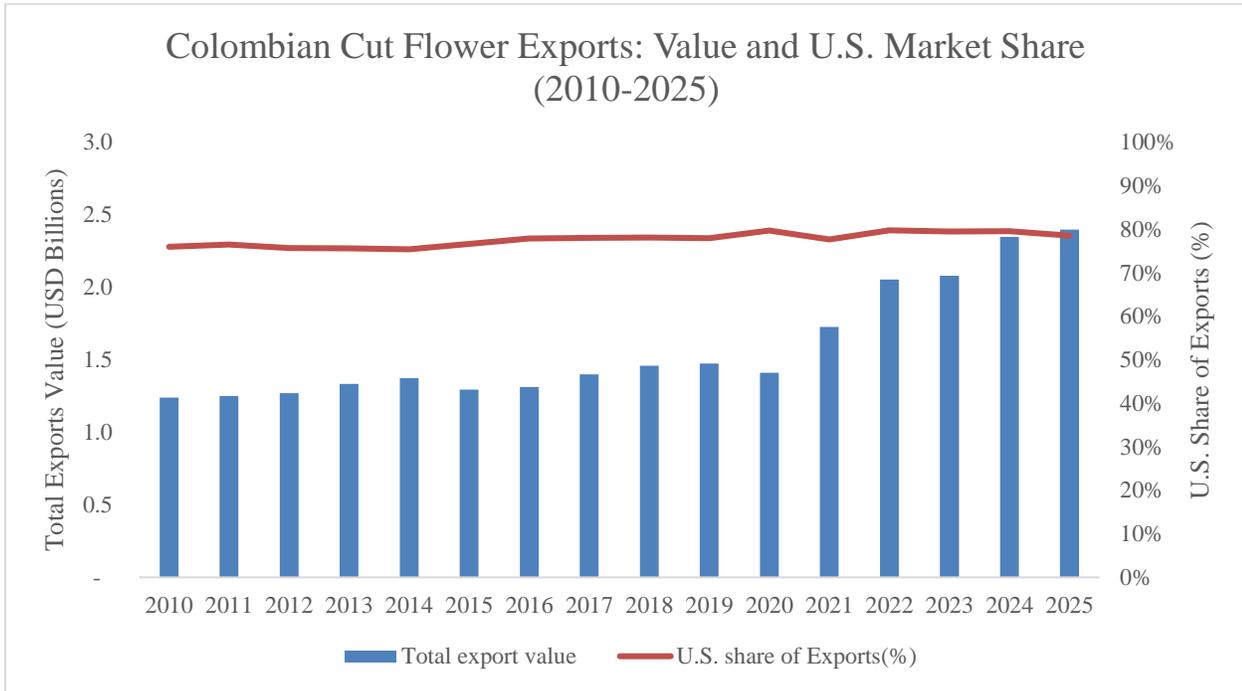
| Region          | Hectares | Total Hectares in 2025 |
|-----------------|----------|------------------------|
| Cundinamarca(1) | 7,840    | 70%                    |
| Antioquia(2)    | 3,136    | 28%                    |
| Others          | 224      | 2%                     |

Data Source: Colombian Agrarian Institute (ICA)

The diversity of Colombian flower production has expanded significantly. Roses remain the dominant export, accounting for approximately 18 percent of total export value in 2025, followed by carnations at 14 percent, chrysanthemums at 9 percent, hydrangeas at 5 percent, and alstroemeria at 3 percent. The remaining 50 percent comprises a broad range of other species. Colombian growers now cultivate more than 1,600 varieties for global markets.<sup>3</sup> The fastest-growing segment is hydrangeas, projected to advance at a 6.7 percent compound annual growth rate through 2030.<sup>4</sup> Although the country has a wide variety of flowers, seed importation can be a bottleneck. This is due to lengthy and, according to the industry, sometimes duplicative risk analyses conducted by the Colombian Agrarian Institute (ICA).

Flower exports grew at a compound annual growth rate (CAGR) of 9.8 percent between 2019 and 2024.<sup>5</sup> The Colombia floriculture market is valued at approximately \$1.98 billion domestically in 2025 and is projected to reach \$2.42 billion by 2030, growing at a CAGR of 4.1 percent.<sup>6</sup>

**Figure 2: Colombian Cut Flower Exports – Value and U.S. Market Share**



Source: Trade Data Monitor

### III. The U.S. Market: Colombia’s Indispensable Partner

The United States is the overwhelming driver of the Colombian flower industry. In 2025, the U.S. accounted for 80 percent of Colombian flower export value and 75 percent of volume. Approximately 80 percent of bouquets purchased by American consumers contain Colombian stems, and Colombia holds a 60 percent share of all U.S. flower imports by value. Nearly 80 percent of all flowers sold in the United States are imported, a structural reality that makes the American market deeply dependent on foreign supply, particularly from Colombia.<sup>7</sup>

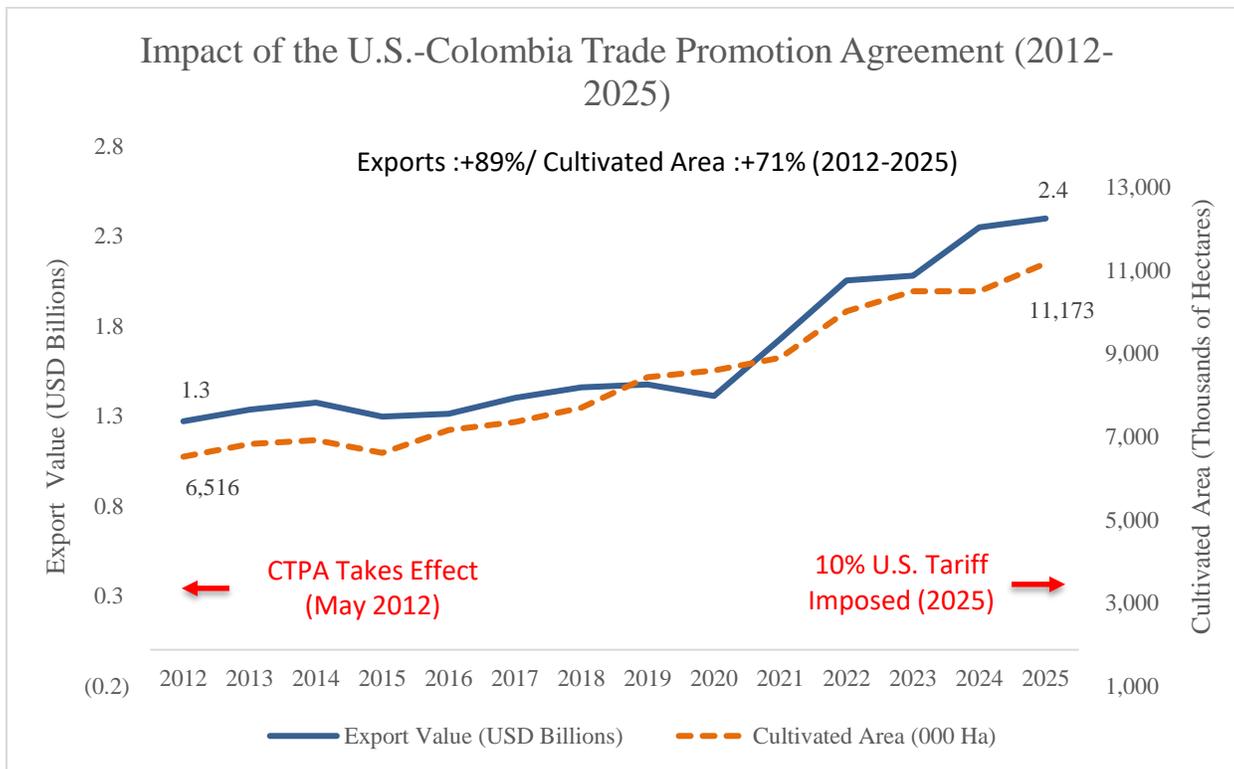
The logistics infrastructure linking the two countries is a defining feature of the partnership. Bogota’s El Dorado International Airport is Latin America’s foremost air cargo handler, and flowers are the single most important cargo item at both El Dorado and Miami International Airport. During the 2024 Valentine’s Day season alone, Colombia exported over 59,000 tons of fresh-cut flowers, with nearly 1,700 cargo flights departing Bogota in the two weeks before the holiday.<sup>8</sup> During peak season, 30 to 35 fully loaded flights per day depart Colombia bound for Miami. In the United States, roughly 30 companies operating hundreds of trucks distribute flowers daily to hundreds of cities. Over 25,000 traditional florist retailers and nearly 1,000 wholesalers source the majority of their product from Colombia.

## The CTPA and Its Impact

The U.S.-Colombia Trade Promotion Agreement, which took effect on May 15, 2012, was a watershed for the industry. By eliminating tariffs on Colombian flowers entering the U.S., the CTPA gave Colombian growers a decisive cost advantage over competitors from non-FTA countries such as Ecuador, whose roses faced a 6.8 percent duty.<sup>9</sup> The agreement also replaced the Andean Trade Preference Act (ATPA), which had required periodic congressional renewal and had sometimes lapsed, creating recurring cycles of uncertainty for growers and investors.

The CTPA framework gave growers the confidence to invest in expansion, new varieties, and technology. As a result, the cultivated area increased from 6,516 hectares in 2012 to 11,173 hectares in 2025. Over the same period, total flower export values rose from approximately \$1.27 billion in 2012 to \$2.4 billion in 2025 (Figure 3). The impact extended well beyond Colombia: Asocolflores estimates that the value of Colombian flower exports is multiplied roughly tenfold by the time it reaches American consumers, meaning over \$20 billion in economic activity is generated along the U.S. value chain, including importers, brokers, truckers, wholesalers, and retailers.

**Figure 3: Impact of the U.S.-Colombia Trade Promotion Agreement (2012-2025)**



Source: Trade Data Monitor; Asocolflores; ICA

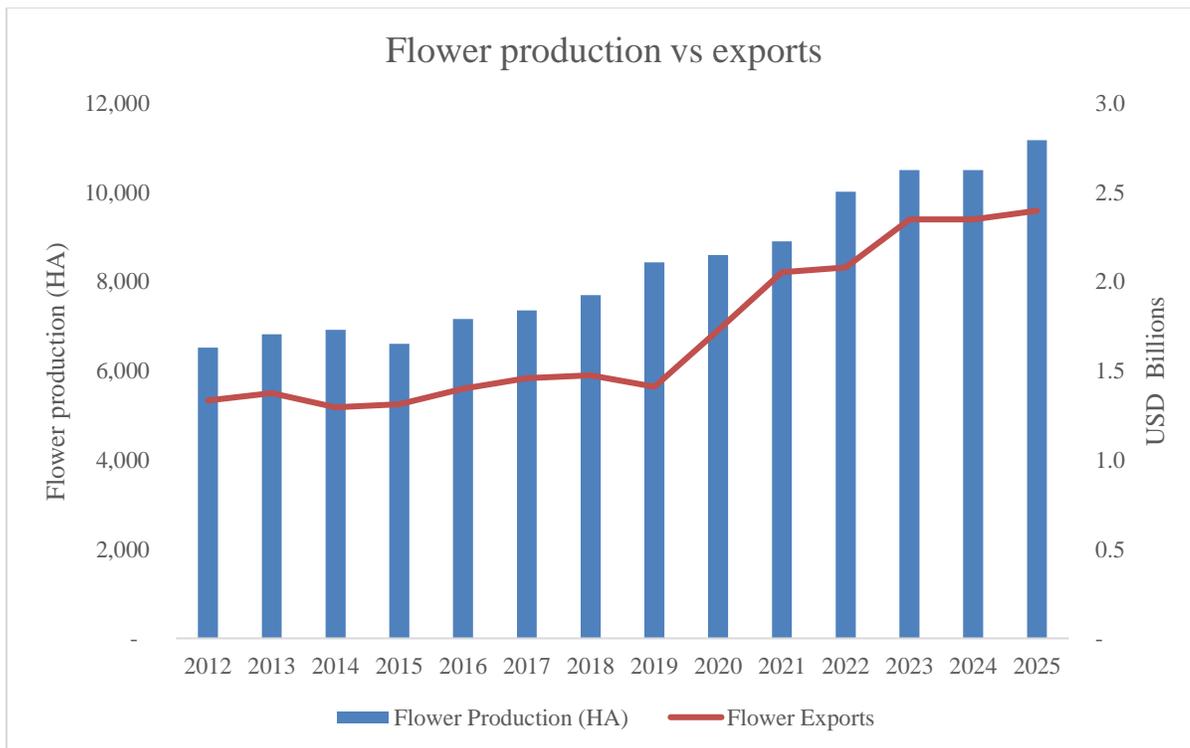
Although flower farms have expanded their growing areas and increased exports, the current year is considered one of the most challenging in recent history for the flower industry. The sector faces several pressures, including the 10 percent tariff imposed in April 2025, the first U.S. duty on Colombian flowers in over a decade and a sharp

reversal of the zero-tariff access established under the CTPA. Industry representatives estimate the tariff adds more than \$200 million in annual costs to the sector.<sup>10</sup>

An additional challenge is the 23.7 percent minimum wage increase that took effect in January 2026. Because labor accounts for 50 to 60 percent of total production costs, and approximately 85 percent of flower workers earn the minimum wage, the increase affects nearly the entire cost base simultaneously.<sup>11</sup> Additionally, the Colombian peso has appreciated nearly 12 percent against the U.S. dollar over the past year, compressing margins for an industry that earns in dollars but pays wages and operating costs in pesos.<sup>12</sup> These three pressures converge from both the revenue and cost sides: the tariff reduces net export earnings, the peso appreciation inflates the dollar cost of Colombian operations, and the wage increase raises the sector's largest expense line.

The combined effect is a margin squeeze that industry leaders have described as unprecedented, with some warning that without relief, widespread layoffs and farm closures could follow.<sup>13</sup> Until recently, Colombia retained a relative competitive advantage over other major flower-exporting nations, which faced higher U.S. tariff rates. However, that advantage is not guaranteed to last. As the United States pursues new bilateral trade agreements, competitors that currently face higher duties could gain preferential access to the American market, potentially eroding or eliminating Colombia's longstanding cost advantage at a moment when the industry is already under significant pressure.

**Figure 4: Colombian Flower Production vs Exports**



Source: ICA/Calculations: Asocolflores

## Demand Trends

Consumer demand for flowers in the United States has evolved in ways that favor Colombian suppliers. The dominant retail channel has shifted from traditional florist shops to supermarkets and mass-market retailers. Major grocery chains such as Walmart, Kroger, Costco, and Whole Foods now treat floral assortments as staple product categories, embedding sustainability and quality requirements into their supplier scorecards.<sup>14</sup> This has created a steady, year-round demand base that complements the traditional Valentine's Day and Mother's Day peaks.

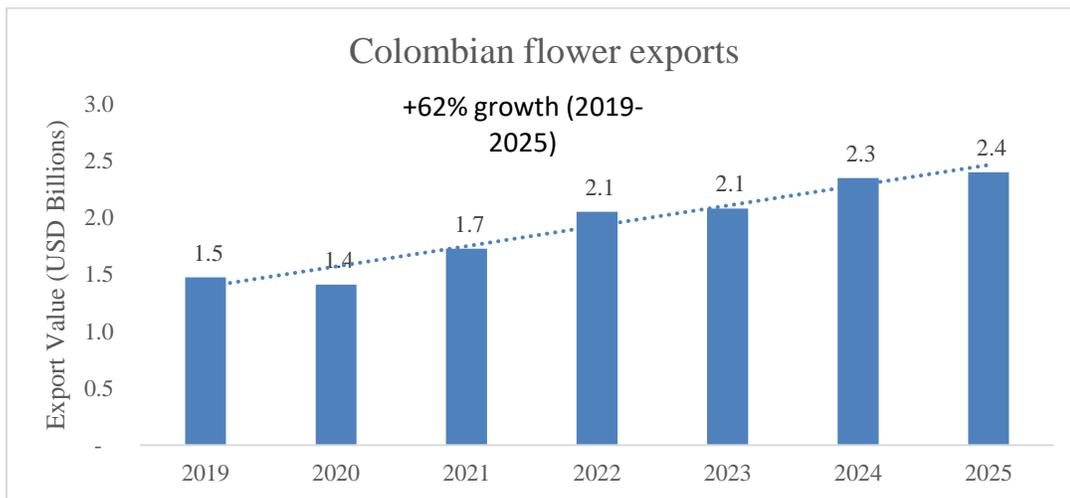
The COVID-19 pandemic proved to be an unexpected catalyst. While lockdowns initially disrupted events and celebrations, Americans increasingly purchased flowers as a way to stay connected. When restrictions were lifted, a surge of delayed celebrations further boosted demand. The result was a sharp acceleration in export values from \$1.47 billion in 2020 to \$2.0 billion by 2022.<sup>15</sup>

Beyond the post-pandemic recovery, a deeper structural shift is reshaping American flower consumption. U.S. consumers increasingly purchase flowers not only for holidays and special occasions but as routine, self-purchase items—a trend that major grocery chains have accelerated by positioning floral departments alongside everyday essentials rather than treating them as seasonal displays. This "everyday flowers" behavior has broadened the demand base well beyond the traditional Valentine's Day and Mother's Day peaks, which together still account for roughly 30 to 35 percent of annual Colombian flower export revenues.<sup>16</sup> During the 2025 Valentine's season alone, Colombian growers shipped approximately 65,000 tons of fresh-cut flowers to the United States, a 10 percent increase over the prior year's 59,000 tons, confirming that peak-season demand continues to rise even as year-round purchasing grows.

At the same time, emerging micro-holidays such as Friendsgiving, Galentine's Day, and Self-Love Day are creating additional demand windows that did not exist a decade ago, further benefiting Colombia's year-round production capabilities and reducing the sector's dependence on two narrow seasonal spikes.<sup>17</sup>

E-commerce fulfillment models that prize consistent quality and predictable supply have reinforced demand for Colombian flowers, which benefit from the year-round growing season and established cold-chain logistics.<sup>18</sup>

**Figure 5: Post-COVID Colombian Flower Export Recovery (2019-2025)**



Source: Trade Data Monitor; Procolombia; Asocolflores

## **IV. Sustainability: From Aspiration to Competitive Advantage**

Sustainability has become a central pillar of the Colombian flower industry's global competitiveness. The Florverde Sustainable Flowers (FSF) certification, administered by Asocolflores, is the sector's primary sustainability standard. More than half of Colombian flower exports now carry Florverde certification, reflecting measurable reductions in pesticide toxicity and water usage.<sup>19</sup> Certified farms capture 10 to 15 percent price premiums over uncertified competitors and face significantly lower risk of delisting under the tightening environmental, social, and governance (ESG) mandates that major U.S. and European retailers now enforce.<sup>20</sup>

International recognition for the sector's environmental work has been extensive. In 2024, the Consumer Goods Forum recognized Florverde as a transparent certification ensuring ethical and socially responsible practices, with particular praise for its corporate ethics provisions.<sup>21</sup> The Colombian Congress awarded Asocolflores a formal recognition for conservation and protection of paramo ecosystems and water resources. The British Columbia Chamber of Commerce awarded the industry first place in its sustainability awards for biodiversity actions, and the American Floral Endowment presented Asocolflores' president, Augusto Solano, with its 2024 Ambassador award.<sup>22</sup>

In 2024, the Sustainable Supply Chain Initiative of the Consumer Goods Forum ratified Florverde's recognition, and the Global Nature Fund of Germany cited Colombian floriculture practices as a benchmark for biodiversity management in its guide for the global industry.<sup>23</sup> Colombia's flower sector played a prominent role at COP16 in Cali, showcasing its results against the biodiversity goals established at COP15.<sup>24</sup>

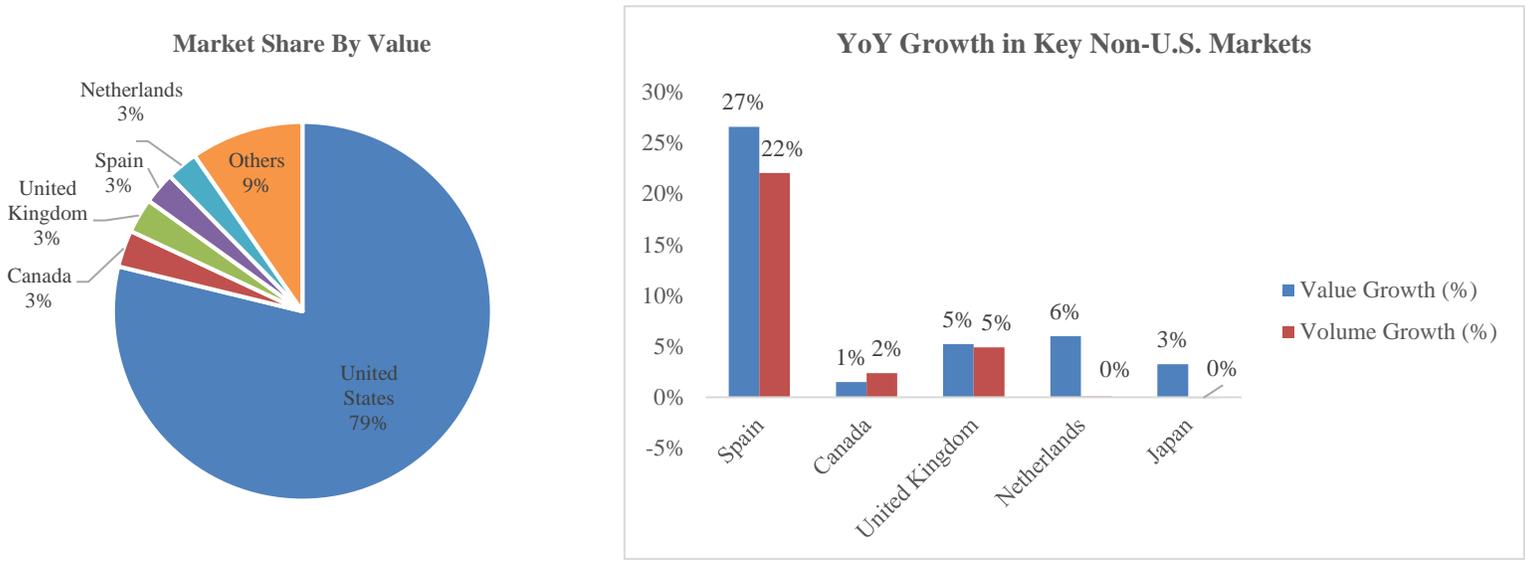
However, the sustainability picture is not without challenges. Environmental organizations have raised concerns about the impact of the foliage industry on cloud forests in the Cundinamarca highlands above Bogota. These ecosystems, among the most biodiverse on Earth, are home to species found nowhere else, including rare orchids, sloths, and hummingbirds. Campaigners report that the production of decorative greens for bouquets is driving fragmentation and pollution from pesticide and fertilizer runoff in these sensitive areas, and that while protective laws exist, enforcement has been insufficient.<sup>25</sup> Addressing these localized environmental pressures while maintaining the sector's broader sustainability credentials will be an important test for the industry going forward.

## **V. Diversification: Reducing Dependence on a Single Market**

The tariff disruption has accelerated a market diversification strategy that was already underway. Colombia now exports flowers to more than 100 countries, and several markets are growing rapidly.

Spain has emerged as the most dynamic growth destination. In 2025, exports to Spain grew 27 percent in value and 22 percent in volume, driven by strong seasonal demand during All Saints' Day and the Christmas and New Year holiday period, which together represent 43 percent of annual Colombian flower exports to Spain.<sup>26</sup> The United Kingdom, the third-largest export market increased 5 percent in value and 5 percent in volume. Japan, the Netherlands, and several Middle Eastern markets—particularly the United Arab Emirates and Saudi Arabia—also represent growing opportunities.<sup>27</sup>

**Figure 6: Colombian Flower Export Diversification by Destination (2025)**



Source: Asocolflores

Proflora 2025, Colombia’s flagship international flower trade fair, demonstrated the sector’s global ambitions. The event brought together buyers and industry leaders from more than 60 countries, consolidating its role as one of the world’s most relevant platforms for the flower business.<sup>28</sup>

At the government level, Colombia has signaled a broader reorientation of its trade relationships. The Petro administration has expressed interest in deepening commercial ties with China, announcing the officially joined integration into the Belt and Road Initiative and preliminary discussions toward a free trade agreement. Through the CELAC framework, Colombia has scheduled high-level trade meetings with China, the European Union, and countries in Africa and the Persian Gulf.<sup>29</sup> Whether these diplomatic efforts translate into meaningful alternative markets for cut flowers—a highly perishable product that depends on fast, reliable logistics—remains to be seen. The U.S. market’s proximity, scale, and consumer habits give it advantages that no other single market can easily replicate.

The urgency of diversification could intensify if competing flower-exporting nations secure preferential trade arrangements with the United States. Should such agreements enter into force, flowers from those countries — including the premium long-stemmed roses for which Ecuador is best known — could regain tariff-free entry to the U.S. market while Colombian flowers remain subject to, as of this reporting, a 10 percent tariff. This asymmetry would create direct competitive pressure on Colombian growers in the American market and strengthens the case for accelerating market development in Europe, the Middle East, and Asia, where Colombia's diversified product mix, and Florverde sustainability credentials, may offer greater differentiation than price competition in a tariff-disadvantaged U.S. market.

## VI. Innovation and Emerging Trends

Technology adoption is accelerating across the Colombian flower sector. AI-enabled crop planning and demand forecasting systems are being deployed both on Colombian farms and within the purchasing operations of major international retail chains, allowing growers to better match production to market signals and reduce waste.<sup>30</sup> Exporters are addressing freight cost volatility through increased greenhouse automation, long-term air capacity contracts, and investment in premium varieties that deliver higher margins per stem.

Ocean freight is a small but growing component of the supply chain, currently accounting for approximately 8 percent of export volume compared to 92 percent for air.<sup>31</sup> Continued investment in cold-chain logistics for sea transport could meaningfully reduce per-stem shipping costs, particularly for hardier varieties such as carnations and chrysanthemums that tolerate longer transit times.

The consumer landscape is also evolving in ways that favor Colombia's year-round production capabilities. Beyond the traditional Valentine's Day and Mother's Day peaks—which together still represent close to 30 percent of annual revenues—emerging micro-holidays such as Friendsgiving and Self-Love Day are creating new demand windows throughout the calendar year.<sup>32</sup> The trend toward e-commerce flower delivery, which prizes consistent quality and fast fulfillment, further advantages Colombian producers with established logistics networks and daily air connections to the United States.

The role of smallholder farms deserves particular attention. In the first half of 2025, exports from smallholder operations rose 55 percent in value and 74 percent in volume, highlighting that the industry's growth is not confined to large-scale producers.<sup>33</sup> Programs supported by Asocolflores and Ceniflores, the Colombian Innovation Center in Floriculture, have worked to bring smaller growers into the formal export supply chain, with potential benefits for both rural development and production diversity.

## VII. Outlook and Conclusion

The Colombian flower industry enters its seventh decade as a larger, more diversified, and more globally recognized sector than at any point in its history. Export values have nearly doubled since the CTPA took effect, employment has grown to support more than 200,000 families, and the sector has earned international credibility for its sustainability practices. Colombia supplies more flowers to the United States than any other country, and the trade relationship generates billions of dollars in economic activity on both sides of the border.

The Colombian flower industry has historically demonstrated a remarkable capacity to adapt. From the improvised charter flights and makeshift cold storage of the 1960s, to the periodic lapses of the ATPA, the sector has overcome obstacles that might have defeated a less resilient industry. That resilience will be tested again.

A critical new variable is the possibility that competing flower-exporting nations could secure preferential trade arrangements with the United States, potentially placing Colombian growers at a significant tariff disadvantage relative to their nearest competitors - a reversal of the cost dynamics that prevailed for more than a decade under the CTPA. For Colombia, this prospect underscores the importance of diversification, sustainability, and innovation strategies.

Colombia's strategic priorities are clear: continue exporting to the U.S. market while pursuing genuine diversification, invest in sustainability not as a compliance exercise but as a durable source of competitive

advantage, leverage technology to improve productivity and responsiveness, and expand opportunities for smallholder farmers who can extend the sector’s social impact. If the industry executes on these priorities—as it has done through six decades of challenges and transformation—Colombian flowers will continue to reach consumers around the world, and the partnership between the United States and Colombia that gave birth to this industry will endure.

## Attachments:

No Attachments.

---

<sup>1</sup>Florists’ Review, “A Look at the Colombian Floriculture Industry in 2024,” December 2024.

<sup>2</sup>FloralDaily, “Colombian Flower Industry in Numbers,” October 11, 2023; Asocolflores data.

<sup>3</sup>New Bloom Solutions, “Colombia Keeps the U.S. Floral Industry Blooming,” June 19, 2025; ProColombia data.

<sup>4</sup>Mordor Intelligence, Colombia Floriculture Market Report, 2025.

<sup>5</sup>New Bloom Solutions, “Colombia Keeps the U.S. Floral Industry Blooming,” June 19, 2025; Trade Data Monitor.

<sup>6</sup>Mordor Intelligence, Colombia Floriculture Market Report, 2025.

<sup>7</sup>Washington Post, “Valentine’s Day Flowers: A Journey from Colombia to the U.S.,” February 12, 2025.

<sup>8</sup>Washington Post, “Valentine’s Day Flowers: A Journey from Colombia to the U.S.,” February 12, 2025; Asocolflores data.

<sup>9</sup>USDA APHIS, “Cut Flower Import Requirements”; WLRN, “Why a U.S.-Colombia Trade War Would Hit Valentine’s Day Roses,” January 27, 2025.

<sup>10</sup>Reuters, “Tariffs Threaten Colombian Flower Industry amid Valentine’s Day Rush,” February 10, 2026; MarketScreener, interview with Jose Antonio Restrepo, Ayure SAS Eclipse Flowers.

<sup>11</sup>Thursd, “Colombia’s 23.7% Minimum Wage Increase and What It Means for Global Floriculture,” January 12, 2026; Asocolflores statement by Augusto Solano.

<sup>12</sup>Reuters, “Tariffs Threaten Colombian Flower Industry amid Valentine’s Day Rush,” February 10, 2026.

<sup>13</sup>Reuters, “Tariffs Threaten Colombian Flower Industry amid Valentine’s Day Rush,” February 10, 2026; MarketScreener, interview with Jose Antonio Restrepo.

<sup>14</sup>Mordor Intelligence, Colombia Floriculture Market Report, 2025.

<sup>15</sup>Trade Data Monitor; Asocolflores Annual Report, 2022.

<sup>16</sup>FloralDaily, “Examining the State of Colombian Floriculture in the Global Market over 2025,” December 24, 2025; Asocolflores data.

<sup>17</sup>New Bloom Solutions, “Colombia Keeps the U.S. Floral Industry Blooming,” June 19, 2025; ProColombia data.

<sup>18</sup>Mordor Intelligence, Colombia Floriculture Market Report, 2025; New Bloom Solutions, “Colombia Keeps the U.S. Floral Industry Blooming,” June 19, 2025.

<sup>19</sup>Consumer Goods Forum, Florverde Sustainable Flowers recognition, 2024; Global Nature Fund of Germany, Biodiversity Management in Floriculture, 2025.

<sup>20</sup>Mordor Intelligence, Colombia Floriculture Market Report, 2025; Asocolflores, “Florverde Sustainable Flowers Annual Report 2024.”

<sup>21</sup>Florists’ Review, “A Look at the Colombian Floriculture Industry in 2024,” December 2024; Consumer Goods Forum, Sustainable Supply Chain Initiative, 2024.

<sup>22</sup>Florists’ Review, “A Look at the Colombian Floriculture Industry in 2024,” December 2024.

<sup>23</sup>FloralDaily, “Examining the State of Colombian Floriculture in the Global Market over 2025,” December 24, 2025; Asocolflores data.

<sup>24</sup>Florists’ Review, “A Look at the Colombian Floriculture Industry in 2024,” December 2024; Asocolflores COP16 reporting.

<sup>25</sup>NPR, “Valentine’s Day Flower Imports from Colombia Could Harm Forest,” February 14, 2025.

<sup>26</sup>Asocolflores, H1 2025 Performance Report, September 2025; FloralDaily, “Colombia Strengthens Position in the Flower Market,” September 12, 2025.

<sup>27</sup>Asocolflores market data, 2025; FloralDaily, “Colombia Strengthens Position in the Flower Market,” September 12, 2025.

<sup>28</sup>FloralDaily, “Examining the State of Colombian Floriculture in the Global Market over 2025,” December 24, 2025; Asocolflores/Proflora 2025.

<sup>29</sup>ColombiaOne, “US Agricultural Tariffs Threaten Colombia’s Coffee, Flower Exports,” March 5, 2025.

<sup>30</sup>Mordor Intelligence, Colombia Floriculture Market Report, 2025.

<sup>31</sup>FloralDaily, “Millions of Colombian Flowers Are Crossing Borders for Valentine’s 2025,” February 5, 2025; Asocolflores data.

---

<sup>32</sup> New Bloom Solutions, "Colombia Keeps the U.S. Floral Industry Blooming," June 19, 2025; FloralDaily, "Examining the State of Colombian Floriculture in the Global Market over 2025," December 24, 2025.

<sup>33</sup> Asocolflores, H1 2025 Performance Report; FloralDaily, "Colombia Strengthens Position in the Flower Market," September 12, 2025.