

Colombia Floriculture - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Colombia Floriculture Market Analysis

The Colombia floriculture market size in 2026 is estimated at USD 2.06 billion, growing from 2025 value of USD 1.98 billion with 2031 projections showing USD 2.51 billion, growing at 4.05% CAGR over 2026-2031. This growth trajectory reflects Colombia's entrenchment as the world's second-largest flower exporter and its duty-free access to the United States under the United States-Colombia Trade Promotion Agreement. Strong year-round production conditions at high altitudes, well-developed cold-chain links through Miami International Airport, and rapid certification uptake for Florverde Sustainable Flowers continue to underpin competitiveness. Demand momentum is reinforced by large United States grocery chains that now treat floral assortments as staple SKUs, by the spread of e-commerce fulfillment models that value predictable quality, and by the accelerating rollout of AI-enabled crop and demand planning systems within Colombian farms and foreign retail chains. Competitive pressure from Ecuador and Kenya is rising, yet Colombia's cost advantage under duty-free rules and its established supply chain infrastructure mitigate substitution risk. Meanwhile, exporters offset freight cost volatility by increasing automation, negotiating long-term air-capacity contracts, and investing in greenhouse technology aimed at higher-margin premium varieties.

Colombia Floriculture Market Trends and Insights

Stable Demand for Year-Round Cut Flowers

United States retailers increasingly view a continuous floral assortment as a shopper-loyalty driver, which locks in steady import

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volumes from equatorial suppliers. Colombia's altitude-based micro-climates allow uninterrupted production cycles that align with this merchandising model. Retailers also pay premiums during Northern Hemisphere off-seasons when Colombia can fill gaps left by temperate producers. This driver sustains predictable cash-flow for growers, anchors long-term contracting with airlines, and supports continual greenhouse investment that further raises output quality.

United States-Colombia Trade Promotion Agreement Duty-Free Access

The United States-Colombia trade promotion agreement eliminates tariffs that reach as high as competing South American flower imports, conferring an enduring landed-cost advantage for Colombian blooms. The preference was stress-tested during a policy dispute but remained intact, preserving exporter margins and retail shelf prices. Duty-free terms also accelerate customs clearance through streamlined documentation, reducing cycle time and shrinkage. Without this edge, industry economists estimate Colombian shipments to the United States would contract by roughly one-quarter as price-sensitive mass-market channels pivot to lower-cost substitutes.

Stringent Phytosanitary Compliance and Policy Risk

USDA Animal and Plant Health Inspection Service (APHIS) mandates detailed pest-free certifications that can delay clearance, especially when white rust alerts trigger hold-and-inspect orders. Compliance costs run 3-5% of FOB value for documentation, treatments, and traceability audits. Smaller farms struggle to absorb these overheads, which can throttle entry of new producers. Periodic lobbying by domestic United States growers for stricter enforcement introduces policy uncertainty that complicates long-range export planning.

Other drivers and restraints analyzed in the detailed report include:

Growth of E-commerce Floral Delivery Platforms
Rising Retailer Adoption of Florverde and Other Eco-Labels
Air-Freight and Fuel-Surcharge Cost Volatility

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Roses generated 32.20% of Colombia floriculture market share in 2025, reflecting altitude-optimized cultivation on the Bogota Savannah that yields long-stemmed varieties prized by North American mass retailers. Hydrangeas hold the fastest growth outlook at a 6.50% CAGR through 2031 as designers favor voluminous heads for event decor and as the crop's tolerance for varied micro-climates expands production zones beyond traditional Andean belts. Within carnations, Colombia preserves outright global leadership, buoyed by decades of varietal refinement and robust Dutch auction demand in Europe. Chrysanthemums, lilies, alstroemerias, and niche exotics collectively broaden bouquets, enabling mixed-stem export cartons that optimize freight cost per kilogram.

Exporters increasingly allocate greenhouse real estate toward varieties demonstrating resilience to longer transit times as e-commerce distribution accelerates. AI-guided cultivar trials identify genetic lines with extended vase life, supporting subscription-based platforms promising minimum seven-day freshness. Investment in sensor-enabled irrigation and real-time climate modulation systems further elevates stem quality, reinforcing Colombia's differential positioning against lower-cost but longer-haul African competitors. As premium varieties multiply, the Colombia floriculture market size attached to specialty stems is projected to expand its revenue contribution faster than volume share.

The Colombia Floriculture Market Report is Segmented by Flower Type (Roses, Chrysanthemums, Carnations, Alstroemerias,

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Hydrangeas, Lilies, Other Flowers). The Report Includes Production Analysis (volume), Consumption Analysis (value and Volume), Export Analysis (value and Volume), Import Analysis (value and Volume), and Price Trend Analysis. Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons).

List of Companies Covered in this Report:

Market Overview Market Drivers Market Restraints Regulatory Landscape Technological Outlook Value/Supply-Chain Analysis
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Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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