Periodic Price Information: Floriculture Products - European Markets

FloraHolland's First Half-Year Accumulated Data, Weeks 1 through 26 2013

Date: 15/07/2013

The statistic data below is provided in kindness of FloraHolland
The quantities and prices are the sum of the listed below flower auctions in The Netherlands:
FloraHolland Aalsmeer, FH Naaldwijk, FH Rijnsburg, FH Bleiswijk, FH Eelde

Prices are in Euro per stem/unit

Total Sales include mediation transactions

FloraHolland

#	**Weeks 1 - 26, 2013**	**Clock Sales**					**Total Sales**	
	Product Group	Stems/Units 2013	Change vs 2012	Price 2013	Price 2012	Change vs 2012	Turnover/Euro 2013	Change vs 2012
	Cut Flowers							
1	Rose Large	1.010.061.199	-6.5%	0.28	0.27	3.7%	357,493,317	1.3%
2	Tulip - Single	632.845.596	-20%	0.16	0.12	33%	197,881,325	25%
3	Chrysanthemum Spray	326,747,876	-8.6%	0.30	0.32	-6%	139,994,615	-4.6%
4	Rose Small & Medium	77,541,257	-26%	0.13	0.13	0.0%	55,396,178	5.6%
5	Lilium (Orïental)	43,797,104	-3.3%	0.75	0.77	-2.6%	50,928,217	0.2%
6	Gerbera mini	224,013,647	-8.2%	0.11	0.14	-21%	48,900,697	-7.1%
7	Chrysant, Single Bud	64,222,500	2.3%	0.46	0.51	-10%	37,700,699	-4.3%
8	Tulip - Double	141,544,522	-18%	0.18	0.14	29%	33,589,512	11%
9	Peony	40,276,897	-13%	0.52	0.48	8.3%	24,749,159	-4.6%
10	Freesia Single bud	67,552,635	-10%	0.19	0.18	5.6%	24,493,700	7.3%
11	Chrysant, Spray Santini	72,336,216	1.6%	0.25	0.25	0.0%	22,123,309	-2.7%
12	Cymbidium Large (stem)	6,362,718	6.9%	2.73	3.28	-17%	21,058,904	-10%
13	Gerbera Large	47,980,917	-7.0%	0.19	0.22	-14%	19,278,879	-7.7%
14	Rose Spray	58,409,286	28%	0.30	0.34	-12%	18,630,255	3.3%
15	Alstroemeria	71,033,400	-1.1%	0.17	0.19	-11%	15,028,311	-4.4%
	Total Top 15	**2.884.725.770**	**-10.5%**	**0.25**	**0.23**	**8.7%**	**1.067.247.077**	**3.3%**
	Total Cut Flowers Sales	**4,143,150,221**	**-9.4%**	**0.24**	**0.23**	**4.5%**	**1,438,018,894**	**2.0%**
	Houseplants							
1	Phalaenopsis	11,169,944	2.9%	3.51	3.55	-1.1%	248,952,722	7.6%
2	Rose	9,151,986	14%	0.94	1.06	-11%	32,538,597	3.6%
3	Kalanchoe	14,940,363	22%	0.59	0.75	-21%	31,059,604	-5.9%
4	Bromelia	5,139,162	-10%	1.29	1.39	-7.2%	26,891,273	-2.5%
5	Anthurium	3,020,126	-9.1%	2.96	2.77	6.9%	26,618,656	-2.0%
6	Hydrangea	4,296,334	3.4%	1.93	2.13	-9.4%	24,477,322	1.6%
7	Various Houseplants	1,707,345	-7.8%	0.67	0.65	3.1%	21,901,220	73%
8	Ficus	2,287,239	-21%	2.22	1.95	14%	16,661,308	5.8%
9	Dracaena	3,216,582	-28%	1.40	1.25	12%	15,405,987	-2.7%
10	Zantedeschia	1,424,601	18%	2.01	2.36	-15%	13,936,685	0.2%
	Total Top 10	**56,353,682**	**3.1%**	**1.67**	**1.78**	**-6.2%**	**458,443,375**	5.9%
	Total Houseplants Sales	**198,565,036**	**1.7%**	**1.13**	**1.20**	**-5.5%**	**836,857,797**	**0.8%**
	Total FH Sales	**4,462,207,568**	**-8.6%**	**0.29**	**0.28**	**2.8%**	**2,525,234,766**	**1.0%**

Notes:

General

The total first half year 2013 figures in the current FloraHolland's auction surveys can be compared with the survey of 2012 only. Before 2012 the contents and the style of surveys was different. Since the restriction of the availability and publication of the auction statistics the contents of the present FH figures contain only the 15 top cut flower and 10 top plant products. Also the assortment cannot always be compared with the assortment of the previous year.

The accumulated turnover up to week 26 was +1.0%, compared to 2012.
The yearly 2013 prognosis was 2.8 %.

So far it is clear already that total supplied quantities in 2013 are lower than last year. This is also clearly to see in the list per product. All was very much affected by the long cold winter and spring. Many products (cut flowers- house, garden – and bedding- plants) arrived to the market a few weeks later than normally.

The auctions are reporting that more and more quantities of cut flower and plants are sold via remote sales or administrative sales and less quantities via the famous clock sales. However when contract/direct purchases are lower and when productions are higher than demand on that very moment, growers have to bring more quantities to be sold via the clock system, with most of the time a negative (temporary) effect on the prices.

Cut flowers

The total cut flowers supplied quantities (domestic and import together) of the top 15 products cannot be compared with the top 15 products of last year, because they were not the same products. Per product, however clear and exact figures can be shown. Nearly all products show a decrease of supply, with the exception of: chrysanthemums single and santini. Prices, in general were only but very slightly higher, except for: chrysanthemums (spray, single and santini), lilies, mini and large headed gerberas, cymbidium orchids and alstroemeria. Higher prices were realised for peonies and large headed roses.

Plants

The first half year 2013 house plant's supplies of the top 10 products have around +3% higher when compared to the same period of 2012. Also here it is not 100% comparable, because the assortment in the top ten list 2013 is different than in 2012. Prices, in general, have turned out to be lower all depending the product. Prices have been higher for: anthurium, various house-plants, ficus and dracaena. Considerably lower prices for: pot roses, kalanchoe, bromelias, hydrangea (hortensia) and zantedeschia (calla lilies). Also for, by far, the biggest product phalaenopsis orchids, prices were slightly lower. Not shown in the survey of the top ten list were some products of which the season was disastrous and nearly total loss, namely for pansies and prim roses, all due to the production and market situation (very cold winter and spring weather).