

## Market Insider

### Floriculture Products' Indicative Price Information / European Markets

These graphics represent the only available information on supply and price in the Dutch flower auctions. Actually, this is currently the only obtainable reliable indicative statistic on the European floriculture market. We provide this information, on a weekly basis.

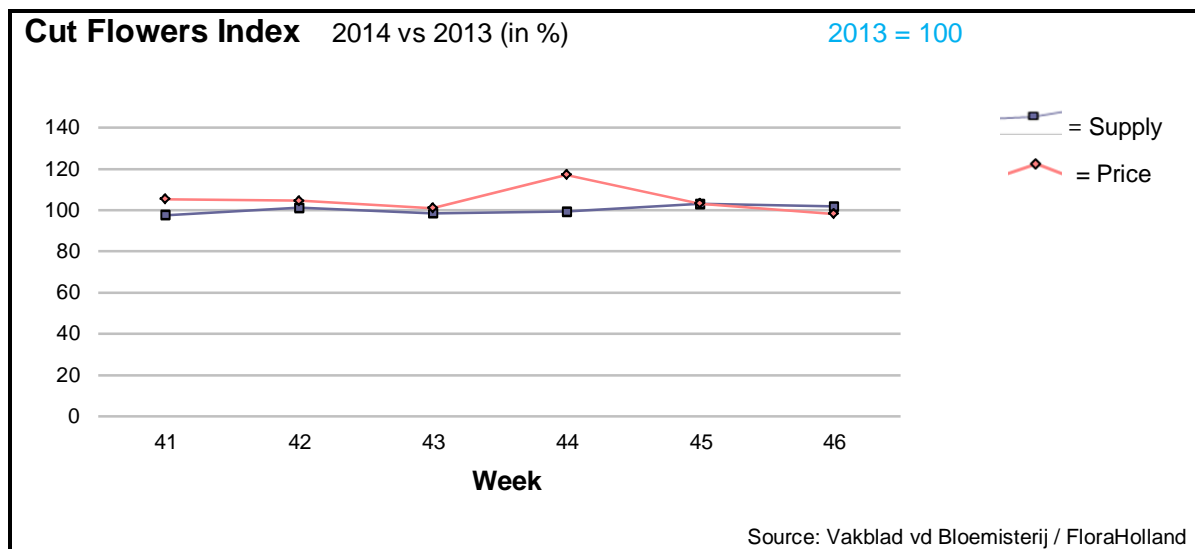
The Market Insider team

Week No. 46-2014

Date: 19/11/14

#### The FloraHolland flower auctions' weekly supply and price index

(Representing the relative supply and average price, compared to the same weeks of last year)



In week 46 the average cut flower price was €0.24 (Clock-only price was 0.26), the same like in 2013. The supply was 1.8% higher.

Big rose's price was €0.19/stem; 2 cents lower than last year, with 3% more sold stems.

Spray chrysanthemums lost 4 cent in price, to be €0.28, with 6% more stems.

Amaryllis lost 7 cents in price, for 18% more units.

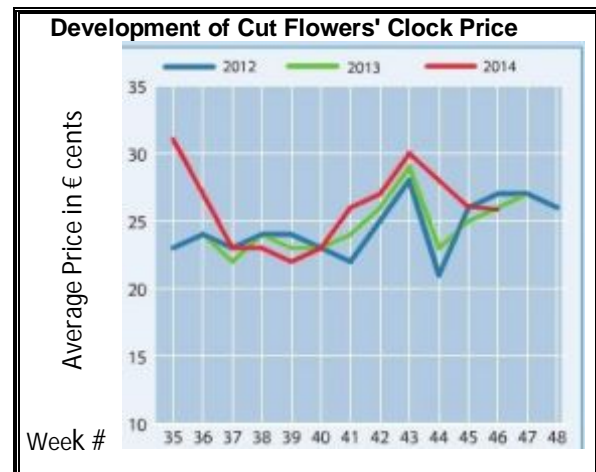
Gerbera mini got 3 cents more in price, for 7% less in supply.

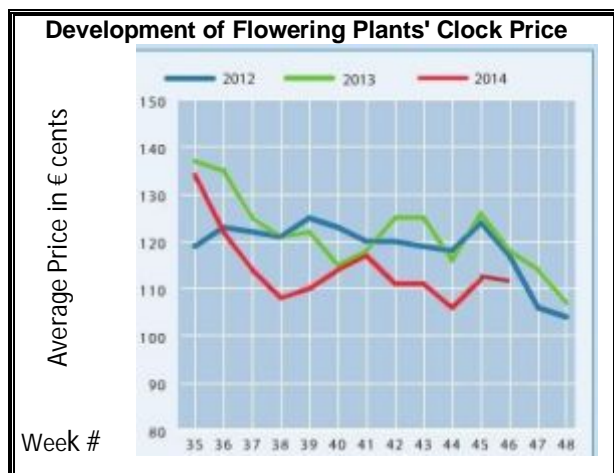
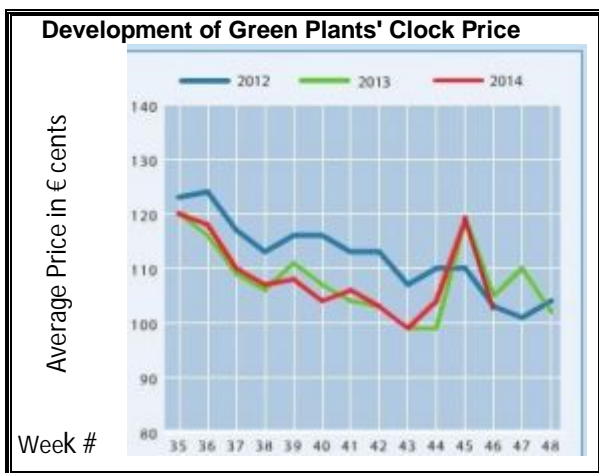
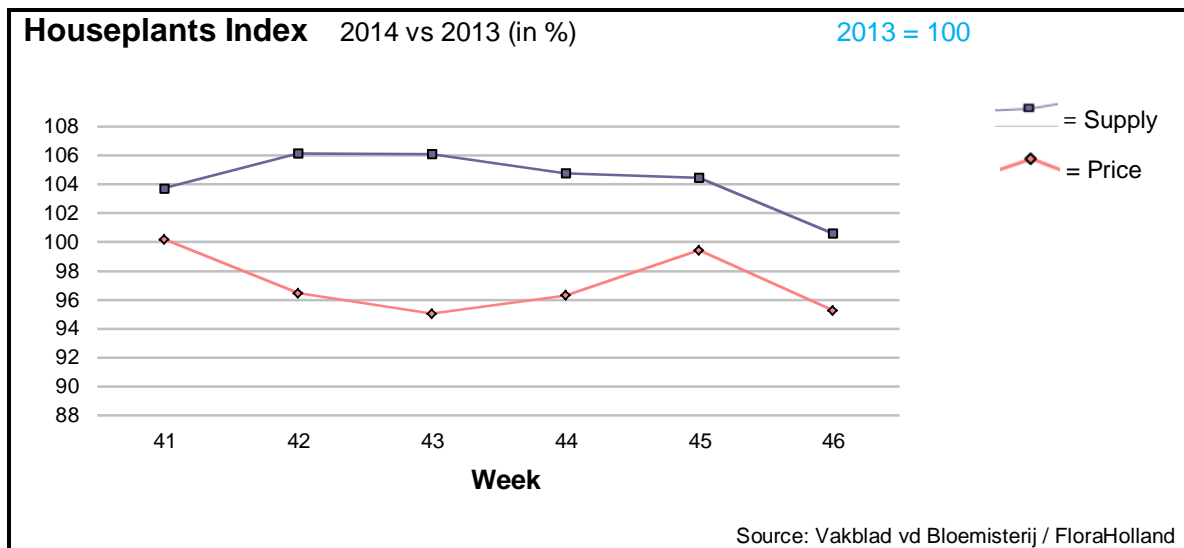
Alstroemeria got €0.26 average price; 3 cents more than in 2013, with less 10.5% sold units.

Many cut flowers got significant higher prices than in last year, with lower supply; among them:

agapanthus, anemone, asclepias, aster, carthamus, chamelaucium/wax flower, delphinium, carnations stan., eucalyptus, helianthus, hypericum, limonium, pittosporum, ranunculus, and solidago.


However, only but a few products got lower prices, with much more sold stems; among others: ammi, spray carnations, trachelium, and tulips.





Like in the 4 previous weeks, also week 46 was characterized by higher supply and lower price than last year. This week was the price 7 cents (5%) lower, with just 1% higher supply. This resulted in 4% lower sales turnover in FloraHolland's for houseplants.

- Phalaenopsis got 8 cents more in price, with 6% less supplied pots.
- Pot hyacinth got 20% lower price, while the supply was 37% higher than last year.
- Pot-amaryllis brought 38% more in price, for 35% less pots than in last year.
- Poinsettia got 5% lower average price, for 8% more pots, of smaller sizes.
- Pot-anthurium got less 17 cents in price' while supply was 13% higher.
- Kalanchoe got 10 cents more in price, for 3% less in supply.
- Schlumbergera, the current 'plant of the month', got 2% less in price, for 1% less pots.
- Dracaena fetched 15 cents less in price, for 13% lower supply.
- Ficus got 20% less in price, even though the supply was by 5% lower supply.

| MARKET INSIDER FOR CUT FLOWERS - ASIAN MARKETS   |   |               |                   |                      |                     |                    |  |
|--|---|---------------|-------------------|----------------------|---------------------|--------------------|--|
| <br>ITC<br>TRADE IMPACT<br>FOR GOOD<br>50 YEARS<br>1964-2014 | Abbreviations used in the report  |               |                   |                      |                     |                    |  |
|  | AUS = Australia   |               |                   |                      | MAL = Malaysia      |                    |  |
|  | CHI = China   |               |                   |                      | NLD = Netherlands   |                    |  |
|  | COL = Colombia  |               |                   |                      | NZL = New Zealand   |                    |  |
|  | ECU = Ecuador   |               |                   |                      | PHI = Philippines   |                    |  |
|  | HAI = Hawaii  |               |                   |                      | SGP = Singapore     |                    |  |
|  | IND = India   |               |                   |                      | TAI = Taiwan        |                    |  |
|  | ISR = Israel  |               |                   |                      | THA = Thailand      |                    |  |
|  | ITA = Italy   |               |                   |                      | USA = United States |                    |  |
|  | KEN = Kenya   |               |                   |                      | ZAF = South Africa  |                    |  |
|  | KOR = Republic of Korea   |               |                   |                      | ZWE = Zimbabwe      |                    |  |
|  | SLA = Sri Lanka   |               |                   |                      | VIE = Vietnam       |                    |  |
| <b>Price Information: Floriculture Products - Japanese Markets</b>   |   |               |                   | <b>(4 Auctions )</b> |                     |                    |  |
| <b>Issue No.</b>   | <b>W46</b>  | <b>Date:</b>  | <b>19/11/2014</b> |                      |                     |                    |  |
| The statistic data below is provided in kindness of the following flower auctions in Japan:  |   |               |                   |                      |                     |                    |  |
| Flower Auction Japan & OTA Floriculture Auction, of Tokyo, and   |   |               |                   |                      |                     |                    |  |
| Tsurumi Kaki Co. Ltd. & Naniwa Flower Auction Co. Ltd. of Osaka  |   |               |                   |                      |                     |                    |  |
| The data below is selected from the total sales results of all the above flower auctions together, during                                    |   |               |                   |                      |                     |                    |  |
| <b>week number : 46 in : 2014</b>  |   |               |                   |                      |                     |                    |  |
| <b>Index:</b>  |   |               |                   |                      |                     |                    |  |
| <b>Quantity</b>  | Number of stems auctioned in the four reporting auctions together                           |               |                   |                      |                     |                    |  |
| <b>Lowest</b>  | Lowest stem price achieved for the product in the four reporting auctions, in Japanese Yen  |               |                   |                      |                     |                    |  |
| <b>Highest</b>   | Highest stem price achieved for the product in the four reporting auctions, in Japanese Yen |               |                   |                      |                     |                    |  |
| <b>Average</b>   | Average stem price achieved for the product in the four reporting auctions, in Japanese Yen |               |                   |                      |                     |                    |  |
| <b>Average US\$</b>  | Average stem price, converted to US Dollar, as per the relevant exchange rate given below.  |               |                   |                      |                     |                    |  |
| <b>Main Origin</b>   | Main countries of origin; See abbreviations in the table at the head of this report.        |               |                   |                      |                     |                    |  |
| <b>Exchange Rate</b>   | <b>1 US\$ =</b>   | <b>116.70</b> | <b>Yen</b>        |                      |                     |                    |  |
| <b>Product Name &amp; Source</b>   | <b>Price in Japanese Yen</b>  |               |                   | <b>Average</b>       |                     |                    |  |
| <b>D = Domestic I = Imported</b>   | <b>Quantity</b>   | <b>Lowest</b> | <b>Highest</b>    | <b>Average</b>       | <b>US\$</b>         | <b>Main Origin</b> |  |
| <b>Total Cut Flowers Sold</b>  | <b>17,247,300</b>   |               |                   |                      |                     |                    |  |
| Alstroemeria -- D  | 268,435   | 20            | 250               | 79                   | 0.68                |                    |  |
| Alstroemeria -- I  | 12,090  |               | 60                | 37                   | 0.32                | COL ISR NLD        |  |
| Ammi majus -- D  | 57,165  | 1             | 110               | 24                   | 0.21                |                    |  |
| Ammi majus -- I  | 0   |               |                   |                      |                     |                    |  |
| Anigozanthos -- D  | 0   |               |                   |                      |                     |                    |  |
| Anigozanthos -- I  | 30,720  | 10            | 150               | 34                   | 0.29                | AUS NLD ZWE        |  |
| Anthurium Pink -- D  | 30  |               | 150               | 117                  | 1.00                |                    |  |
| Anthurium Pink -- I  | 10,103  | 8             | 170               | 53                   | 0.46                | THA                |  |
| Anthurium Red -- D   | 370   |               | 180               | 133                  | 1.14                |                    |  |
| Anthurium Red -- I   | 12,450  | 4             | 200               | 61                   | 0.52                | AUS THA USA ZAF    |  |
| Anthurium White -- D   | 40  |               | 100               | 85                   | 0.73                |                    |  |
| Anthurium White -- I   | 5,625   | 3             | 210               | 64                   | 0.55                | THA                |  |
| Banksia -- D   | 0   |               |                   |                      |                     |                    |  |
| Banksia -- I   | 880   |               | 120               | 76                   | 0.65                | AUS NZL            |  |
| Bupleurum -- D   | 9,840   | 20            | 100               | 62                   | 0.54                |                    |  |
| Bupleurum -- I   | 0   |               |                   |                      |                     |                    |  |
| Calla -- D   | 38,818  | 5             | 400               | 105                  | 0.90                |                    |  |
| Calla -- I   | 12,426  | 13            | 280               | 131                  | 1.12                | NLD NZL            |  |
| Carnations Spray -- D  | 398,225   | 1             | 160               | 41                   | 0.36                |                    |  |
| Carnations Spray -- I  | 529,339   | 1             | 65                | 31                   | 0.27                | COL                |  |
| Carnations Standard -- D   | 560,021   | 1             | 160               | 39                   | 0.34                |                    |  |
| Carnations Standard -- I   | 709,992   | 1             | 175               | 36                   | 0.31                | COL                |  |
| Chrysanthemum Spray -- D   | 700,365   | 1             | 150               | 48                   | 0.41                |                    |  |
| Chrysanthemum Spray -- I   | 488,440   | 1             | 90                | 42                   | 0.36                | KOR                |  |
| Delphinium -- D  | 127,289   | 3             | 400               | 90                   | 0.77                |                    |  |
| Delphinium -- I  | 0   |               |                   |                      |                     |                    |  |
| Dracaena -- D  | 28,612  | 1             | 320               | 45                   | 0.39                |                    |  |
| Dracaena -- I  | 180,775   | 1             | 150               | 26                   | 0.22                | SGP                |  |
| Euphorbia Marginata -- D   | 3,900   |               | 70                | 29                   | 0.25                |                    |  |
| Euphorbia Marginata -- I   | 0   |               |                   |                      |                     |                    |  |

| Product Name & Source<br>D = Domestic I = Imported | Quantity         | Price in Japanese Yen |            |           | Average     | Main Origin |
|--|------------------|-----------------------|------------|-----------|-------------|-------------|
|  |                  | Lowest                | Highest    | Average   | US\$        |             |
| Eustoma -- D                                       | 463,140          | 6                     | 800        | 137       | 1.17        |             |
| Eustoma -- I                                       | 18,200           | 7                     | 170        | 78        | 0.67        | AUS         |
| Freesia -- D                                       | 76,343           | 8                     | 75         | 43        | 0.37        |             |
| Freesia -- I                                       | 16,000           | 16                    | 45         | 24        | 0.21        | NLD         |
| Gentiana -- D                                      | 36,540           | 1                     | 160        | 37        | 0.31        |             |
| Gentiana -- I                                      | 0                |                       |            |           |             |             |
| Gerbera -- D                                       | 460,886          | 4                     | 150        | 35        | 0.30        |             |
| Gerbera -- I                                       | 700              | 40                    | 45         | 44        | 0.38        | KOR         |
| Gladiolus -- D                                     | 108,561          | 9                     | 130        | 61        | 0.52        |             |
| Gladiolus -- I                                     | 5,600            | 20                    | 100        | 48        | 0.41        | NLD         |
| Gypsophila -- D                                    | 292,688          | 2                     | 230        | 47        | 0.40        |             |
| Gypsophila -- I                                    | 7,896            |                       | 60         | 46        | 0.40        | ISR         |
| Heliconia Pendula -- D                             | 1,715            | 3                     | 140        | 37        | 0.31        |             |
| Heliconia Pendula -- I                             | 388              | 22                    | 600        | 101       | 0.86        | SGP         |
| Leucad. Safari Sunset -- D                         | 0                |                       |            |           |             |             |
| Leucad. Safari Sunset -- I                         | 11,143           | 17                    | 150        | 63        | 0.54        | AUS NZL ZAF |
| Leucospermum Cordifolium -- D                      | 0                |                       |            |           |             |             |
| Leucospermum Cordifolium -- I                      | 5,724            | 36                    | 180        | 107       | 0.92        | AUS NZL ZAF |
| Lily Casablanca -- D                               | 20,768           | 50                    | 900        | 412       | 3.53        |             |
| Lily Casablanca -- I                               | 0                |                       |            |           |             |             |
| Lily Longiflorum -- D                              | 62,660           | 20                    | 180        | 88        | 0.75        |             |
| Lily Longiflorum -- I                              | 1,320            | 33                    | 75         | 52        | 0.45        | KOR NLD     |
| Limonium Sinuatum -- D                             | 459,070          | 5                     | 90         | 34        | 0.30        |             |
| Limonium Sinuatum -- I                             | 0                |                       |            |           |             |             |
| Molucella -- D                                     | 400              | 11                    | 11         | 17        | 0.15        |             |
| Molucella -- I                                     | 0                |                       |            |           |             |             |
| Nerine -- D  | 5,450            | 15                    | 1,000      | 73        | 0.62        |             |
| Nerine -- I  | 5,410            | 40                    | 145        | 76        | 0.65        | NLD NZL     |
| Orchid Anna -- D                                   | 0                |                       |            |           |             |             |
| Orchid Anna -- I                                   | 110,710          | 10                    | 75         | 21        | 0.18        | SGP THA     |
| Orchid Cymbidium -- D                              | 15,926           | 50                    | 1,100      | 396       | 3.40        |             |
| Orchid Cymbidium -- I                              | 8,587            | 150                   | 1,200      | 627       | 5.37        | NLD NZL     |
| Orchid Oncidium -- D                               | 13,724           | 10                    | 550        | 102       | 0.87        |             |
| Orchid Oncidium -- I                               | 145,455          | 7                     | 200        | 57        | 0.49        | SGP TAI THA |
| Orchid Phalaenopsis -- D                           | 16,065           | 54                    | 3,000      | 565       | 4.84        |             |
| Orchid Phalaenopsis -- I                           | 8,234            | 133                   | 1,000      | 675       | 5.79        | AUS NZL     |
| Orchid Sonia -- D                                  | 0                |                       |            |           |             |             |
| Orchid Sonia -- I                                  | 75,630           | 5                     | 42         | 20        | 0.17        | THA         |
| Ornithogalum -- D                                  | 850              | 44                    | 120        | 85        | 0.73        |             |
| Ornithogalum -- I                                  | 35,443           | 7                     | 95         | 27        | 0.23        | NLD ZAF     |
| Protea King -- D                                   | 0                |                       |            |           |             |             |
| Protea King -- I                                   | 1,230            | 60                    | 1,000      | 286       | 2.45        | AUS ZAF     |
| Protea others -- D                                 | 0                |                       |            |           |             |             |
| Protea others -- I                                 | 481              | 55                    | 1,500      | 449       | 3.85        | AUS NZL     |
| Riceflowers -- D                                   | 0                |                       |            |           |             |             |
| Riceflowers -- I                                   | 120              |                       | 220        | 241       | 2.07        | AUS NZL     |
| <b>Rose Total -- D</b>                             | <b>1,047,934</b> | <b>1</b>              | <b>600</b> | <b>88</b> | <b>0.75</b> |             |
| <b>Rose Total -- I</b>                             | <b>347,088</b>   | <b>3</b>              | <b>900</b> | <b>54</b> | <b>0.46</b> |             |
| Rose Avalanche -- D                                | 84,665           | 28                    | 180        | 93        | 0.79        |             |
| Rose Avalanche -- I                                | 3,570            | 40                    | 126        | 67        | 0.57        |             |
| Rose Delilah -- D                                  | 2,280            | 10                    | 125        | 54        | 0.46        |             |
| Rose Delilah -- I                                  | 0                |                       |            |           |             |             |
| Rose Dukaat -- D                                   | 8,620            | 15                    | 140        | 56        | 0.48        |             |
| Rose Dukaat -- I                                   | 0                |                       |            |           |             |             |
| Rose Esther -- D                                   | 4,980            | 15                    | 100        | 47        | 0.40        |             |
| Rose Esther -- I                                   | 500              | 6                     | 30         | 16        | 0.14        |             |
| Rose Fantasy -- D                                  | 770              | 50                    | 140        | 86        | 0.74        |             |
| Rose Fantasy -- I                                  | 0                |                       |            |           |             |             |
| Rose First Red -- D                                | 0                |                       |            |           |             |             |
| Rose First Red -- I                                | 635              | 30                    | 30         | 30        | 0.26        | IND         |
| Rose Gold Strike -- D                              | 890              | 30                    | 130        | 74        | 0.64        |             |
| Rose Gold Strike -- I                              | 23,059           | 3                     | 40         | 19        | 0.16        | IND         |

| <u>Product Name &amp; Source</u> | Quantity | <u>Price in Japanese Yen</u> |         |         | Average | Main Origin |
|----------------------------------|----------|------------------------------|---------|---------|---------|-------------|
|                                  |          | Lowest                       | Highest | Average | US\$    |             |
| D = Domestic I = Imported        |          |                              |         |         |         |             |
| Rose Grand Gala -- D             | 730      | 30                           | 91      | 63      | 0.54    |             |
| Rose Grand Gala -- I             | 2,030    | 5                            | 50      | 25      | 0.21    | IND         |
| Rose Milva -- D                  | 4,113    |                              | 160     | 96      | 0.82    |             |
| Rose Milva -- I                  | 0        |                              |         |         |         |             |
| Rose Noblesse -- D               | 5,545    | 15                           | 100     | 47      | 0.40    |             |
| Rose Noblesse -- I               | 3,890    | 16                           | 40      | 26      | 0.22    | IND         |
| Rose Pareo -- D                  | 8,975    | 24                           | 120     | 65      | 0.55    |             |
| Rose Pareo -- I                  | 0        |                              |         |         |         |             |
| Rose Red Roses D --              | 24,735   | 5                            | 162     | 53      | 0.45    |             |
| Rose Red Roses I --              | 0        |                              |         |         |         |             |
| Rose Saphir -- D                 | 5,470    | 20                           | 120     | 59      | 0.50    |             |
| Rose Saphir -- I                 | 0        |                              |         |         |         |             |
| Rose The Teresa -- D             | 9,830    | 19                           | 150     | 65      | 0.56    |             |
| Rose The Teresa -- I             | 0        |                              |         |         |         |             |
| Rose Tineke -- D                 | 23,535   | 20                           | 170     | 75      | 0.64    |             |
| Rose Tineke -- I                 | 98       |                              |         | 38      | 0.33    | IND         |
| Rose Spr Lovely Lydia -- D       | 8,820    | 30                           | 180     | 100     | 0.85    |             |
| Rose Spr Lovely Lydia -- I       | 2,590    | 30                           | 80      | 52      | 0.45    | KOR         |
| Rose Spr Macarena -- D           | 4,950    | 30                           | 170     | 82      | 0.71    |             |
| Rose Spr Macarena -- I           | 0        |                              |         |         |         |             |
| Rose Spr Mixed -- D              | 3,017    | 1                            | 250     | 61      | 0.52    |             |
| Rose Spr Mixed -- I              | 0        |                              |         |         |         |             |
| Sandersonia -- D                 | 12,199   | 27                           | 180     | 92      | 0.78    |             |
| Sandersonia -- I                 | 260      |                              | 100     | 78      | 0.67    | NZL         |
| Trachelium -- D                  | 990      |                              | 100     | 62      | 0.53    |             |
| Trachelium -- I                  | 1,700    |                              | 125     | 82      | 0.70    | ISR NLD     |
| Tulip -- D                       | 50,040   | 15                           | 160     | 63      | 0.54    |             |
| Tulip -- I                       | 0        |                              |         |         |         |             |
| Waxflowers -- D                  | 0        |                              |         |         |         |             |
| Waxflowers -- I                  | 5,700    | 10                           | 80      | 49      | 0.42    | AUS         |
| <u>Green Foliage</u>             |          |                              |         |         |         |             |
| Beargrass -- D                   | 6        |                              | 333     | 333     | 2.85    |             |
| Beargrass -- I                   | 1,250    | 20                           | 350     | 137     | 1.17    | USA         |
| Leatherleaves -- D               | 69,380   | 5                            | 60      | 28      | 0.24    |             |
| Leatherleaves -- I               | 215,789  | 1                            | 37      | 15      | 0.13    | USA         |
| Ruscus Israel -- D               | 350      |                              | 15      | 16      | 0.13    |             |
| Ruscus Israel -- I               | 7,600    |                              | 35      | 27      | 0.23    | ISR         |
| Ruscus Italian -- D              | 1,940    | 10                           | 90      | 51      | 0.43    |             |
| Ruscus Italian -- I              | 8,050    | 3                            | 80      | 40      | 0.34    | ITA         |
| Salal -- D                       | 0        |                              |         |         |         |             |
| Salal -- I                       | 12,640   | 10                           | 400     | 67      | 0.58    | USA         |