# Market Dynamics

## Ornamental Plants Europe – April 2016

3 May 2016

## The Netherlands

### Netherlands Auctions

The February 2016 auction houseplants turnover increased by 10.5% when compared to the same month of the previous year, realised with a supply increase of 9.3%, resulting in an average unit price for all products of € 1.68 (last year € 1.67).
Better prices for pot roses, kalanchoe, anthurium, bromeliad, hyacinth on pot, hydrangea, and dracaena.
Lower prices for phalaenopsis orchids, arrangements, and narcissus on pot.
The garden plants turnover increased by 1.6%, realised with a supply decrease of 3.9%, resulting in an average unit price for all products of 93 € cents (last year 88 cents).

The March 2016 houseplants turnover decreased by 0.4%, compared to the same month of last year, realised with a supply decrease of 7.9%, resulting in an average unit price for all products of € 1.57 (last year € 1.46).
Better prices for phalaenopsis orchids, kalanchoe, pot rose, hydrangea, arrangements, anthurium, bromeliad, hyacinth on pot, and zantedeschia.
Lower prices for narcissus on pot.
The garden plants turnover decreased by 12% against March 2015, realised with a supply decrease of 14.8%, resulting in an average unit price of 83 € cents (last year 81 cents).

During the month of March the houseplants market was quite positive, this in contradiction with the cut flower situation. The plants turnover increased in March, while the cut flower turnover decreased. Surprisingly better prices and results for the Phalaenopsis orchids, which were cheaper during the entire past year. To the contrary, the whole range of so-called bulb flowers on pot, supplied in huge quantities, sold for lower-like prices only.
This product group has expended during the past 5 - 10 years from almost zero to an enormous product group.
Positive were also sales and prices of most green plants, especially dracaena and ficus.

Throughout April the plants market changed into lower supply, and slightly higher prices. Also in this month, the plant market situation was much better than the cut flower situation.

Total supplied quantities in April decreased by 5.4% compared to the same month of last year, and prices were some 9% higher. The garden and bedding plants season started very slowly, mainly due to the weather conditions, which were winter-like all the time, with day temperatures of some 8 – 10 degrees Celsius and with some night frosts.

## Netherlands Importers

The February 2016 export turnover of cut flower and plants together increased by 1% when compared to the same month of last year.
Better and positive results in United Kingdom, with +10%, Italy, Belgium with +11%, Switzerland, Poland with +9%, Sweden and Other Countries.
Negative results in Germany, Russia with -28 %, France, and Austria with -14%.

The export turnover of March 2016 for cut flowers and plants together ended up with zero change. Countries with positive results were Germany, France, Belgium with +9%, Switzerland, Poland with +18%, and Other Countries.
Negative results to United Kingdom with -9%, Italy, Russia with -38%, Sweden with -7% and Austria.

The accumulated export turnover of the first quarter of 2016 increased by 0.6% vs the same period of last year.
Positive results in Germany, United Kingdom, Italy, Belgium with +10%, Switzerland, Poland with +13% and Other Countries.
Negative results in France, Russia with minus -30%, Sweden, and Austria with -10%.

## Denmark

So far, during the period January to April 2016 the fully-grown plants market and business were not so bad. To the contrary, demand, sales, prices, and results were rather positive and satisfactory.
With the relatively moderate and mild weather throughout the whole winter, the business was going on all the time. Also in March, when the garden and bedding plants' season started to take off, people started to purchase these products in good volumes.

Only in April, when the weather became autumn like, the market for the mentioned plants became a bit stagnant again.

The fully-grown flowering plants sector also profited of the positive market development. Good demand and sales of kalanchoe, saint paulia and already of the first geranium and pelargonium. Still some price pressure on the saint paulia in particular.

In the green plants sector good demand and sales of all the medium and mini plant types. Slower was the market for the bigger size plants. Phoenix roebelinii plants were still not allowed to be imported, because of the supposed bacterial disease.

In the tropical ornamental young plant sector enough plant material was imported, but domestic growers had extra space to be filled on time. Since the very good sales during the past months, local growers had more space available for new plantings.

As mentioned before, import of phoenix roebelinii is not allowed from origins such as Southern Europe and several Central American countries.
Nonetheless, phoenix canariensis plants were plentiful available and used instead.

## Germany

The fully-grown plants market during the past two months March and April can be called rather positive and satisfactory. In the first half of March the plants business was very good, while during the second half of the month it slowed down slightly; however not to a very low level.

Overall, results of the whole month of March was quite good with reasonable margins. Most popular were demand and sales of the spring flowering plants, such as the whole assortment of bulb flowers on pot, like narcissus, hyacinths, muscari, crocus, and many others.

April became even a better month, for both green plants and for flowering house, bedding, and garden plants.
The green plants situation has considerably improved, mainly because of lower production and the supply.
In the flowering plants sector, the opposite happened. Strong increase of production and supply, especially of phalaenopsis orchids and bulb flower on pot. Was the share of green-plants and flowering plants some years ago 50-50% - now it is about 60-40% in favour of the flowering plants.

In the tropical and normal ornamental plants sector plenty of products were available all the time. Only supplied quantities of phoenix roebelinii were and still are marginal, due to the import ban for this product, especially for those originating from the southern European countries and from some countries in Central America.

Some prices for the respective products: schefflera braid 80 cm in a pot size 21 for € 5.80. The same plant in pot 24 € 8.50 – 9.50.
Marginata tufts 1.20 m' high for € 7.50 (was a year ago only 3.50); areca 1.40 m' high in a pot size 24 for € 12.00 – 14.00; hedera in a pot size 12 for 60 – 70 cents; succulents in a pot size 12 for 80 cents (was € 1.20 – 1.40).

## Sweden

Throughout the months March and April, as well as during all the first four months of the year, the fully-grown plants market was rather good and satisfactory.
In March the market was mainly focussed on the flowering houseplants, but also on the green plants, especially on the medium and min I size types.

For the large green plants the market was very limited. In the sector of primroses, supplied quantities were excessive and therefor prices were very low; hardly any profit could be made. To the contrary, for the pansies the situation was very positive.
The seasons of the primroses ended up negatively and the season of the pansies was excellent.

In April nearly everything was focussed on the garden and bedding plants. All went very good and smoothly during the first three weeks of the month. However, during the fourth week, when the weather became winter like again, demand and sales for the garden plants was almost down to zero.

Less and less plants nowadays originate from domestic production, and more and more plants are imported; mainly from Denmark and the Netherlands and for some seasonal plants, such as erica and calluna, also from Germany.