

Market Dynamics

Ornamental Plants Europe – August 2014

02 September, 2014



The Netherlands

Netherlands Auctions

The July auctions' turnover of houseplants decreased by 0.1% compared to the same month of last year, realised with a supply decrease of 5.3%, resulting in a total average price for all plant types of € 1.49 (last year € 1.41) per plant. The garden plants turnover decreased with 9.7%, realised with a supply decrease of 12.8%, resulting in a total average price for all garden plant types of € 1.10 (last year € 1.06) per piece.

July this year was a month with nice weather; sunny, dry, and with good temperatures of around 25°C (with some exceptions of 30–33°, but during a few days only).

Total supply of house, garden, and bedding plants was slightly lower this year, mainly due to the early start of the season, after the mild spring and the very nice early summer.

Naturally, when crops are starting earlier, they are also terminating earlier, giving room for other later products, but also for early autumn products, such as chrysanthemums, ericas and callunas. So it happened, those plants came earlier into flowering and they arrived also earlier to the market.

Surprisingly prices of ericas and callunas remained steady and acceptable. Only for chrysanthemums prices were slightly lower than needed for the producers/growers.

Towards the very end of July and further throughout the first half of August the market even improved and prices became again slightly higher. So, most producers, growers, but also traders and florists had better sales, even though prices were slightly higher.

Many consumers came back from their summer holidays and they started buying new plants right away, to replace the dead plants in homes and in gardens. From trade perspective a good development. However consumers were also happy to purchase some new plants.



Throughout the second half of August the plants market continued to be steady. The autumn campaign has started already. Many new seasonal products arrived in the market. Plant types such as pot chrysanthemums in any size and format, ericas and callunas and many other typical perennials.

Netherlands Importers

The July 2014 floriculture export figures (cut flowers and plants together) from the Netherlands are published by Floridata/VGB as follows: The July 2014 export turnover of floriculture products increased by 2% when compared to the same month of last year.

Much better results were obtained from: United Kingdom (+9.4%), France (+15%), Switzerland (23%), Poland (+11%) and Austria (+13%).
Minor results from: Italy (- 3.8%), Russia (-7%), Belgium (-7.8%), Sweden (-10%), and Other Countries (-10.4%).

Accumulatively from 1 January till 31 July the export turnover increased by 1.6% compared to the same period of last year. Best and positive results were obtained by exports to: Germany (+3.8%), France (+4.4%), Switzerland (+11%), Poland (+16%), Austria (+5.4%), and Sweden (+4.9%).
Most negative results to Russia (-8.5%) and Other Countries (-3.8%).

The fully-grown plants market during the months of July and August was not too bad this year. Normally this typical summer months are amongst the quietest months; but, not this year. It has to be said that the total supplies were rather moderate and for sure not overdone. The prices were acceptable and reasonably satisfactory, both for the house and for the garden and the bedding plants.

Throughout the second half of August the typical seasonal autumn plants were supplied and delivered already. This was earlier than normally, thanks to the mild last winter, the nice spring weather and the good weather during June and July. That forced production ahead by about three till four weeks.

In the tropical ornamental young plants sector it was reasonably calm during the months of June, July and the first half of August. However as from mid-August this market has gradually increased again. Enough quantities were available from the foreign production countries; also enough areca palms and many other types of palms now.

Denmark

The summer demand and sales of fully-grown plants was reasonably satisfactory this year, and the market situation was more or less normal when compared to many previous years. Of course the best results during the given period were obtained for the garden and bedding plants, which had their peak time of the year. Nearly everything was sold out and almost nothing was wasted.

The only one product which did not benefit of the good prices was the hortensia, of which the market was really oversupplied; prices where therefore much lower than in previous years.

In the houseplant sector the market was reasonable and also found normal given the period of the year; for the green as well as for the flowering houseplants. Good prices and results for kalanchoe, saint paulia, phalaenopsis orchids and many others.

Also in the house-plant assortment hortensia was the least performing product, mainly due to the very low prices.

In the green-plants sector all was more or less normal; meaning nothing special during the summertime.

As from the beginning of August the market for houseplants started to slightly improve. The garden plants were disappearing while the autumn plants arrived in the market already. Autumn plants like erica, calluna and pot chrysanthemum were offered in good quantities, while the prices were acceptable.



In the tropical ornamental young plant sector the market situation was also normal, given the period of the year. Always at summer period those plants are used in smaller quantities, due to the alternatives of the garden plants. The general quality level of the imported goods was very good.

It can be expected that this market will gradually improve during the months to come.

Germany

Normally July is the “absolute” summer month, also the month that most people are on vacation and that all schools have their summer holidays. Normally, this is also a month for lower demand, sales and prices. This year the weather in the July was excellent, nice sunny and warm, but not as hot as it can be. Surprisingly the total supply of house and garden plants was slightly lower than normally, but on the other hand prices were not very high, but acceptable and reasonably satisfactory.

With the mild spring and the nice summer, nature was all the time ahead by some three till four weeks. That meant an earlier start of the production of many products, but also an earlier end of the season for the same products, giving room for alternatives.

During the second half of July and the first half of August the production and harvest of the early autumn products was already in full swing. Many ericas, callunas, gaultheria and many other products were available in good quantities. The general quality level was excellent and prices were acceptable.

Ericas and calluna can be used either as houseplant or as garden plant. It was found out that consumers were buying lots of those plants, especially for having them as a houseplant. If this is going to be a new phenomenon/trend - it would be very nice and helpful to swallow the big quantities. In the past those plants were almost only used as garden plants.

For the normal houseplants, for the green as well flowering plants, demand and sales were reasonable and also better than in previous years during the same months. Also those products fetched higher prices, especially during the beginning of August.

In the tropical ornamental young plants sector offerings were still plentiful, but not over-done. In a few weeks' time, when the summer is finishing it is expected that this product group will increase again.

Some prices for the respective products such as: dracaena marginata tufts in a pot size 21 with 3 plants for €3.20 – 4.50; phoenix roebelinii in a pot size 30 for €18.00 – 22.00; dieffenbachia in a pot size 17 for €1.50 – 1.70; the same plant in a pot size 12 for €0.55 – 0.60; mixed green plants in a pot size 12 for €0.75.

