

Market Dynamics

Ornamental Plants Europe – November-December 2013

15 January, 2014



The Netherlands

Netherlands Auctions

The November 2013 plant figures have been published by FloraHolland auctions: Houseplant turnover slightly decreased, with 0.5% when compared to the same month of last year; realised with a supply decrease of 3.2%, resulting in a total average price for all plants together of € 1.62 (last year € 1.58).

Better prices for: phalaenopsis orchids, bromeliads, cyclamen, schlumbergia, and ficus. Lower prices for: anthurium, and hyacinths on pot.

The December houseplant turnover increased by 12%, realised with a supply increase of 8.6%, resulting in 3% higher total average price per plant.

The 2013 garden-plants turnover increased with 39% realised with a supply increase of 23%, resulting in a 13% higher price per plant (all plants together).

The month of November was a month with a lower turnover, when compared to the same month of last year, mainly due to a lower supply of most of the products.

However quite some increase was already noticed for all the typical winter and Christmas plants, such as: poinsettias, hyacinths, hellebores, small pine plants, Christmas trees, anthurium, phalaenopsis orchids, pot roses, cyclamen and pot amaryllis.

Prices in general turned out to be slightly higher, especially for products such as: pot amaryllis, certain types of cactus, bromeliads, and cyclamen; while considerably price losses were quoted for anthurium.

The December house- and garden-plant sales turned out to be very good. Supplied quantities in both sectors were quite numerous and prices turned out to be much better than expected before, and also when compared to the whole year and the same period of last year. All in all, a happy end of the year.

The 2013 annual auction figures were published already: Turnover of houseplants increased with 1.9%, realised with a supply increase of 1.1%, resulted in slightly higher prices.

The garden-plants turnover decreased with 2.2%, realised with a supply decrease of 3.2%.

Netherlands Importers

The November 2013 plant export figures were published by HBAG (Exporter's Union) as follows: Plant export from the Netherlands was minus 3%, compared to the same month of last year. Differences were noticed per country of destination: Strong decreases to countries like: France -10%, Italy -6%, Poland -6%, Austria -23% and 'other countries' -4%. Increased exports to: Germany with +8%, United Kingdom +5%, Belgium +11%, +Sweden 6%, Switzerland +15% and Russia +1%.

Throughout the last two months of 2013 the fully-grown plants market was moderate and calm. Nothing abnormal also for the green plants sector.

During this period the market is in the Christmas and New Year's atmosphere, which means demand for flowering plants and many kinds of decorative articles, mixed arrangements, and Christmas trees and branches.

As said the market is full with flowering plants, such as: poinsettias, small pine plants, hellebores, amaryllis on pot, hyacinths on pot, phalaenopsis orchids and many other types. On the other hand importers and wholesalers were busy with many pre-orders made for January delivery, by buyers, such as: multiples, supermarkets, garden centres and even to private florists. Normally these orders will be prepared and delivered right after Christmas, when all the Christmas stuff was thrown out of the consumers' homes .

In the tropical ornamental young-plant sector the business was ongoing as normally. Enough new young plant material was coming in all the time. Only areca palm quantities had to be adjusted, since demand and sales of the fully grown palms was moderate during the last half year. It looks as if consumers are not replacing the former palms with newer ones.

Denmark

For traditional houseplants the month of November was very slow and quiet; in particular for the group of green plants, which was nothing really abnormal given the period of the year.

At the end of the year traders and also consumers are never really interested to purchase green plants, because there are so many alternative products and articles around in the market towards the approaching Christmas time. Only at the very end of the month, just before the first Advent's Sunday, on the first of December, the market gradually improved. Churches had to be decorated for this special celebration and therefore lots of any kind of plant, or special decorative products and articles were demanded and used.

Throughout the first two weeks of December the real flowering plant demand and sales started developing. Special Christmas plants such as: poinsettias, amaryllis, cyclamen, azalea, kalanchoe and many bulb products on pot, most of them in red and white colours were demanded and sold for reasonable prices.



The 2013 poinsettia campaign could be called very good and much better when compared to previous years.

As said, hardly any use for the traditional green plants. During the Christmas and New Year's week a lot of days were holidays, so days off or closing days for companies and shops. However, plants market and the obtained results could be called good and satisfactory. All the poinsettias and kalanchoes were totally sold out.

Remarkable and positive was the fact that few days before Christmas, suddenly the market for green plants drastically improved. It was unexpected, but of course welcome and positive. Even the sector of the indoor landscaping products improved after a long slow period .

In the tropical ornamental young-plant sector the market was also nothing really spectacular. To the contrary it was rather slow in this branch, which was also called reasonably normal given the period of the year. New young plant material was plentifully available and quantities were imported, but only for use in the New Year.

Germany

The fully-grown plants market during the whole month of November was very slow and quiet, even very poor, according to growers and traders. Hardly any positive demand of any kind of plant, in particular for the whole range of green plants. This situation was however nothing new, because every year during this period the market is full of alternative products and articles, so much needed and used for the approaching Christmas time. For this event mainly flowering plants and any kind of decorative article or products are used. Products like: branches, wreaths, leaves, berry products and many others.

Towards the end of November and the first two weeks of December the market was supplied with lots of special Christmas plants, such as: poinsettia, amaryllis, azalea, cyclamen, kalanchoe, special Christmas mixed arrangements (some green and some flowering plants, mainly in smaller and medium sizes). As traditionally, the market was very slow and quiet for the whole range of green plants. These plants' market is expected to improve as from the beginning of the new year.

The Christmas and New Year's results turned out to be reasonable, and better than previous years during the same period. Suddenly, mainly due to the continuous mild weather, the market was already flooded with primroses. Prices however hardly reached the minimum price level of 16 Eurocent per plant. The minimum price was temporary lifted; otherwise some 30–40% would not have been sold.

In the tropical ornamental young plants sector plenty of new young plant material was available all the time for bargaining prices, as was the case during the past two years. It seems all the time that more quantities are entering the market, while on the other hand there is not enough place for all the stuff and for special prices.

Some representative prices for the respective products: areca palms of 1.10 meter high in a pot size 19 for € 5.50, dracaena marginata 4 inch rooted canes for € 0.20 – 0.25, 6 inch dr. marginata rooted canes for € 0.30–0.35.

Sweden

During the first half of November the fully-grown plants market was calm and slow. Hardly any movement of plants, and then only in the flowering plants sector. Green-plants were not demanded and sold at all, which was normal, given the period of the year. During that period of the year, the Advent and Christmas time only special plants and decorative products and articles are used.



Only towards the end of November the market gradually improved, at first especially for the first Advent's Sunday, when many churches, buildings and houses were decorated with special decorative products and article. In addition, the special Christmas plants did arrive in huge quantities to the market. Plants such as: poinsettia, amaryllis, kalanchoe, calandiva and cyclamen, all domestically produced. Also phalaenopsis orchids, however these plants were almost for 100 % imported, either from the Netherlands or from Denmark. Most popular were the medium sized plants with two stalks. Some bigger and some midi and mini plants of the latter products were used as well, but all in moderate quantities.

During the first half of December the market for the mentioned Christmas products really exploded and nearly everything was sold out very quickly, for reasonable prices. Even during the last two weeks of the month the market did remain to be very satisfactory.