

Market Dynamics

Ornamental Plants Europe – March 2014

7 April, 2014



The Netherlands

Netherlands Auctions

The February 2014 auction figures for house, garden, and bedding-plants are published as follows. The houseplants turnover of February 2014 has increased by 6% when compared to the same month of last year, realised with a supply increase of 0.4%, resulting in a total average price for all plant types of € 1.75 per plant (last year €1.66). Better prices were quoted for: phalaenopsis orchids, bromeliads, kalanchoes, hyacinth on-pot, narcissus on-pot and hydrangeas; lower prices were obtained for pot roses, dracaenas and rhododendrons. The garden plants turnover has increased by 16.8%, realised with a supply increase of 45.7%, resulting in a total average price of €0.81 per plant (last year €1.01).

Even though International Woman's Day is not a special day for good demand and sales of plants, this year it all turned out to be positive. Total supplied quantities during the first week of March were considerably smaller than normally and also when compared to the same week of last year. Prices were much higher for nearly all products, types of plants, formats and varieties.

The absolute best products were: phalaenopsis orchids, pot roses, kalanchoes and many of the so-called bulb on-pot products, particularly the hyacinth and narcissus on-pot. Prices in general were much higher for phalaenopsis orchids, pot roses and hyacinths. On the other hand, prices were lower for hortensia on-pot and for kalanchoe.

Green houseplants were also sold positively, even though those products were not destined for Woman's Day. The mild and nice spring weather was, of course, a positive trigger, and many of the mentioned plants could be sold outdoors in the open markets.



During the week after Woman's Day the plants market remained positive, especially for the flowering houseplants, and even more for the garden and bedding plants; also due to the early and nice spring this year.

Throughout the second half of the month the weather was continuously nice and sunny, while temperatures went up to 20–24°C. All those factors were positive for the garden and bedding plants sector. Huge quantities were sold and planted by the end consumers. It can already be stated now that the season is going to be very satisfactory; this in contradiction to last year, when the garden plants season ended up disastrous and a total loss.

Netherlands Importers

The February 2014 plant export figures were published by HBAG (Exporter's Union) as follows. The February house and garden plants export turnover has increased by 4% when compared to the same month of last year. Last year the garden plants market was nearly dead and this year it was most flourishing, a hundred percent difference. Best results were obtained in Italy (+21%), Sweden (+18%) and Ukraine (+41%). However, also to other countries results were mostly positive, especially to Germany, Belgium, Russia and 'other countries'.

Negative results were only in France (-6%), United Kingdom (-12%), Austria (-18%) and Switzerland (-4%).

This year the weather conditions were so nice that the fully-grown plants market turned out very good and satisfactory, and much better than in nearly all previous years. Of course, the mild winter and spring weather have been a great advantage. Plants, both houseplants as well as garden plants, could be moved and sold all the time, even outdoors. This is in strong contrast with the sales and results of the past several years, when the winters were quite severe. The greatest contrast was noticed in the garden plants sector. Last year the entire season (March - May) was a disastrous. Nobody, not growers nor traders, made any money. This year has most probably been the best garden plants season ever. However, the season is not over yet.

In the houseplants sector supplied quantities were considerably larger, due to the sunny weather, while prices were even higher. All sold well, and was welcomed by the whole branch; producers, wholesalers, florists and other selling spots. Even the green plants gained from the encouraging conditions. Most types of green plants could be sold for higher prices as well.

In the tropical ornamental plants sector the market was identical to the situation in the fully-grown plants sector. When fully-grown plants' sales are better, growers can move and sell plants more quickly. Thereafter more greenhouse space is available for newly planted young plants. These were the conditions of the first three months of the year 2014. From the tropical production and exporting origins, sufficient plant material was available, except from some regions in Costa Rica, where farms suffered from some draught, negative for the developing of new plant material. Hopefully all will improve soon.

Denmark

The beginning of 2014 has been a very good start of the fully-grown plants' business, both for the houseplants as for the garden and bedding plants sectors. For the first time in many years, growers, producers and traders were very satisfied with the obtained sales, prices and results, which were much better than in many previous years, surely during the last ten years.

The mild winter and spring were most probably very much responsible for this situation. Plants could be sold all the time, indoors as outdoors, and the general quality level did not really suffer from severe cold and darkness.

March In particular has turned out very good and satisfactory, both for the flowering houseplants and for the garden plants. With the nice and mild spring weather, garden plants could be sold and planted in the gardens much earlier than normally. Nature was some 3-4 weeks earlier than usually.

Best demand and sales of flowering houseplants were for kalanchoe, saint paulia and the later varieties of primroses. The season of the earlier varieties of primroses was disastrous - most of those plants, if sold, obtained prices which did not even cover the cost price.

In the garden plants sector pansies were the absolute bestsellers; big quantities for good prices.

Green plants demand and sales were also rather good and positive. However, it is expected that these plant types will be sold well also during the coming weeks/months.

In the tropical ornamental young-plants sector the market was also improving. With the nicer and milder weather, local growers were starting to buy and plant new young plants earlier as well. On the supplying side of the market sufficient new plant material was available, except for the so-called indoor landscaping types and sizes. They were not plentifully available on time. Most probably all is going to improve during the months to come.



Germany

As during January and February, March also showed very positive demand, sales and results for house, garden and bedding plants; very good results after so many years of moderate sales and prices. Of course, the mild winter and spring weather played an important role. All kinds of plants could be sold outdoors and in the open markets, but also in the garden centres, all the time. Meanwhile, consumers were starting to work and plant new plants in their gardens. Only the primrose season was negative, even lost, because those plants arrived at the market in huge quantities and too early.

As said, best trade was made with the garden and bedding plants, and selling prices were positive all the time. The most successful product in March was the pansy, used in big numbers. In the houseplants sector best results were obtained from the flowering plants, which could nearly all be sold for satisfactory prices; especially the phalaenopsis orchids, but also the whole range of bulb products on-pot.

In the green plants sector all went on steadily. No exceptional quantities, except for some palm types such of phoenix roebelinii and kentias, both oversupplied.

In the tropical ornamental young plants sector sufficient products and quantities were available all the time. The market was in good balance and prices were reasonable. However, as mentioned before, there were oversupplies of certain types of palms. Some prices for the respective products: kentia palms, 2.20 m high in a pot size 24 for €16.00-20.00 (should be around 25.00–30.00); phoenix roebelinii, 1.50 m high in a pot size 27 for €10.00 (should be €20.00); ph. Roebelinii, 1.70 m high in a pot size 27 for €14.00 (should be €25.00).

Sweden

Throughout March the fully-grown plants market has been very good and satisfactory, both for the flowering houseplants as for the early garden plants. The good market conditions and results have turned out very positively for producers as well as for traders, such as wholesalers, supermarket and florists' premises.

It was even possible to sell plants in the open markets, especially in the southern regions of the country. Of course, not in the central and northern regions of Sweden, where the situation was – as it is normally every year – very winter-like.

Nearly all plants, in stock at wholesalers and final sales' points, were sold out all the time, for very good prices. The best-selling products were: pot chrysanthemums, late varieties of primroses, ranunculus on pot, kalanchoe, calendula, and pansies - most of them in yellow colours, the spring- and Easter colours. Very good demand and sales were already noticed for garden-plants, which can be used and planted much earlier than normally, due to the mild spring.

