



European Commission
Agriculture and Rural Development



Development of live plants and products of floriculture over the period 2000-2008

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DG Agriculture and Rural Development (DG AGRI)
Unit C.2. Olive oil, horticultural products

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Objective of the analysis

- ❑ Assess the development of the live plants and products of floriculture sector in the EU27 over the period 2000-2008, based on data relating to land area, production, trade and consumption

Structure of analysis

1. Land area

2. Production

3. Trade

3.1. Import

3.2. Export

3.3. Trade balance

4. Consumption

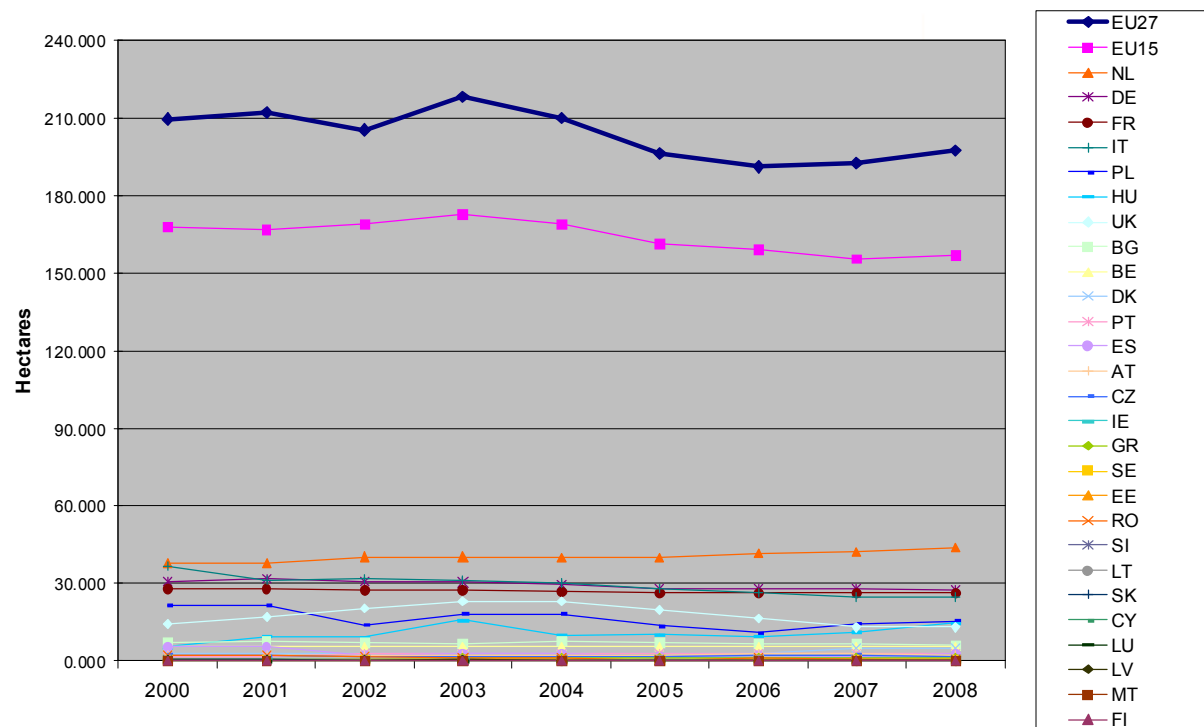
Methodology

- 1. Cut flowers and cut foliage**
- 2. Potted plants, bedding and balcony plants and nursery plants**
- 3. Conifers and hardy perennial plants**
- 4. Bulbs and corms**



1. LAND AREA

Evolution of land area of flowers and ornamental plants and nursery plants in the EU (in hectares)



⇒ **Estim. at 204400 ha. in 2008**

⇒ **Estim. + 2.5% vs 2007**

⇒ **highly concentrated in the Old Member States:**

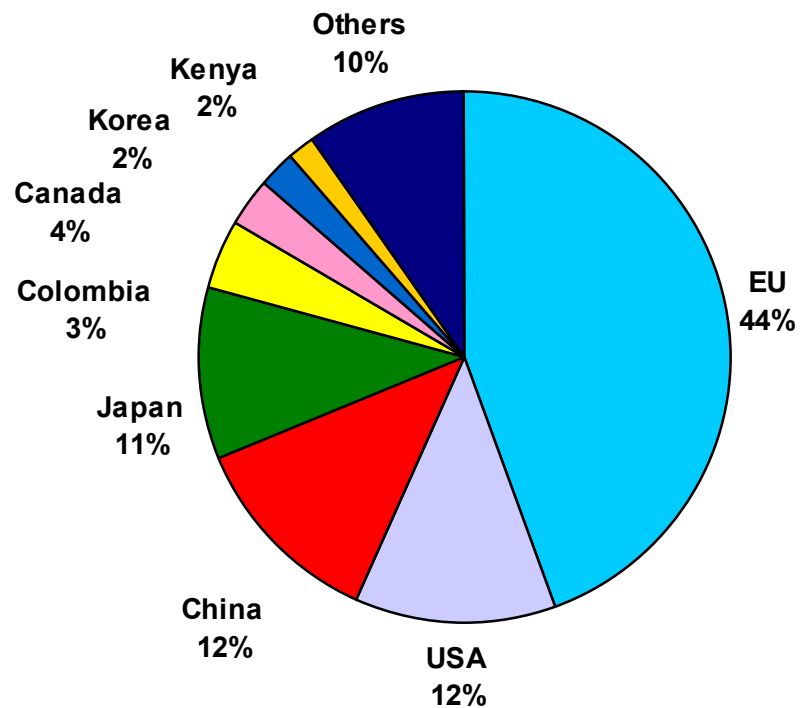
- Netherlands (49400 ha)
- Italy (28200 ha.)
- Germany (27300 ha.)
- France (26100 ha.)

Source of data: Eurostat
 Warning: data are not available for all the countries and all the years. Some of them are estimated



2. PRODUCTION

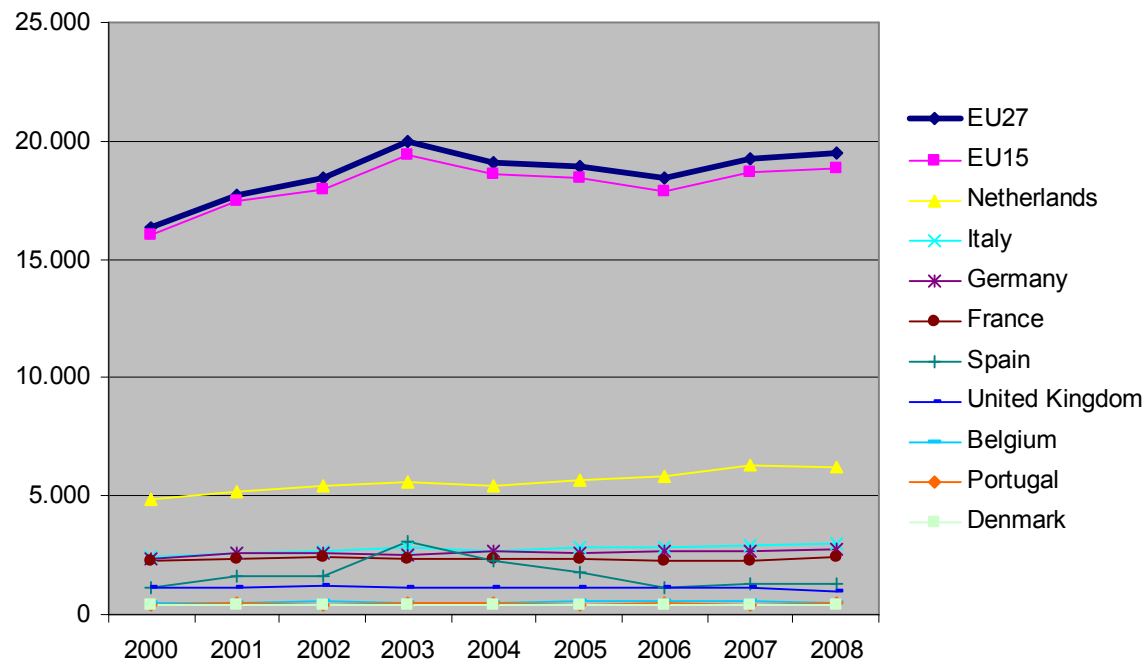
World production of flowers and potted plants by country (share of value)



- ⇒ World production: 24 billion Euros
- ⇒ The EU is the largest producer: 11 billion Euros

Source: AIPH/Union Fleurs

Value of the production of plants and flowers* (in million Euros)

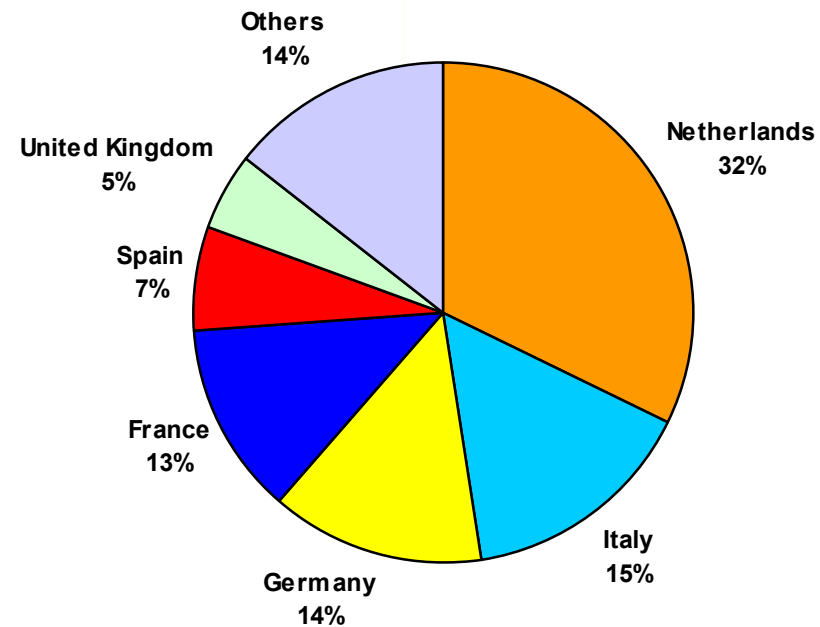


- ⇒ 19.5 billion Euros in 2008
- ⇒ Mainly in Old Member States (97%)
- ⇒ Slight growth: +1.3% vs 2007
 - OMS +1%
 - NMS +11.4%
- ⇒ Main contributors to the growth:
 - France: +8.8%
 - Germany: +3%
- ⇒ Significant decrease in the UK: -12,3%

Source: Eurostat

* Plants and flowers = ornamental plants and flowers + nursery plants + christmas trees and plantations.

Production of plants and flowers* by country in 2008 (share of value)



⇒ Production is highly concentrated in the Old Member States

Source: Eurostat

* Plants and flowers = ornamental plants and flowers + nursery plants + christmas trees and plantations.

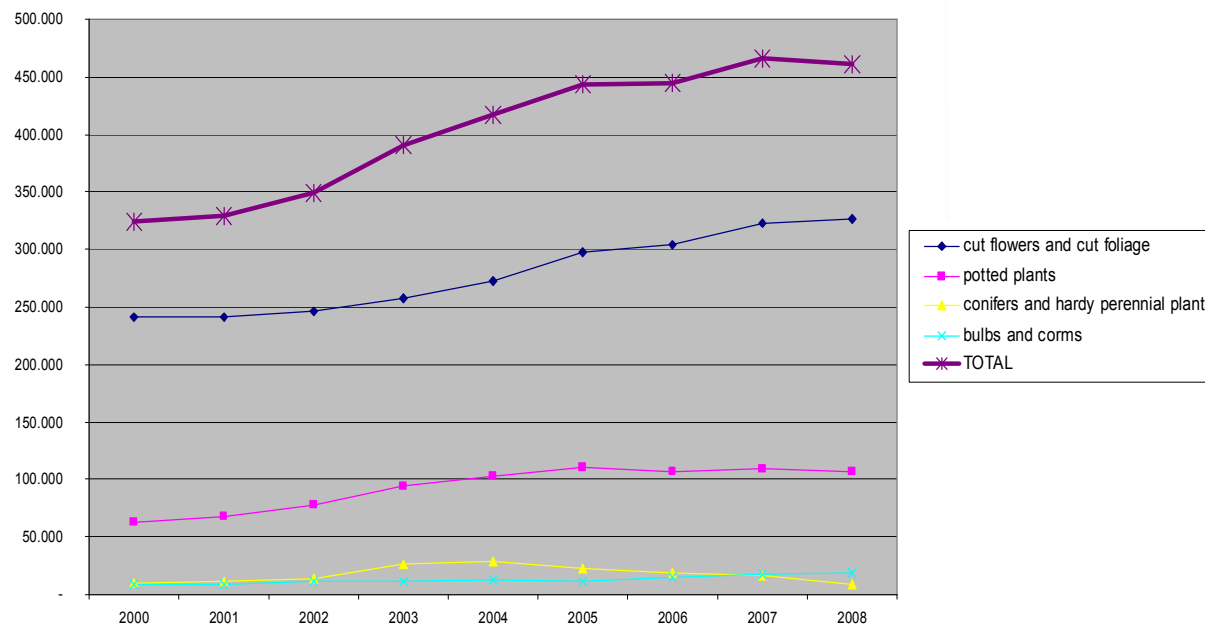


3. TRADE



3.1 Import

Imports of live plants and products of floriculture (in tonnes)



Source: Eurostat Comext

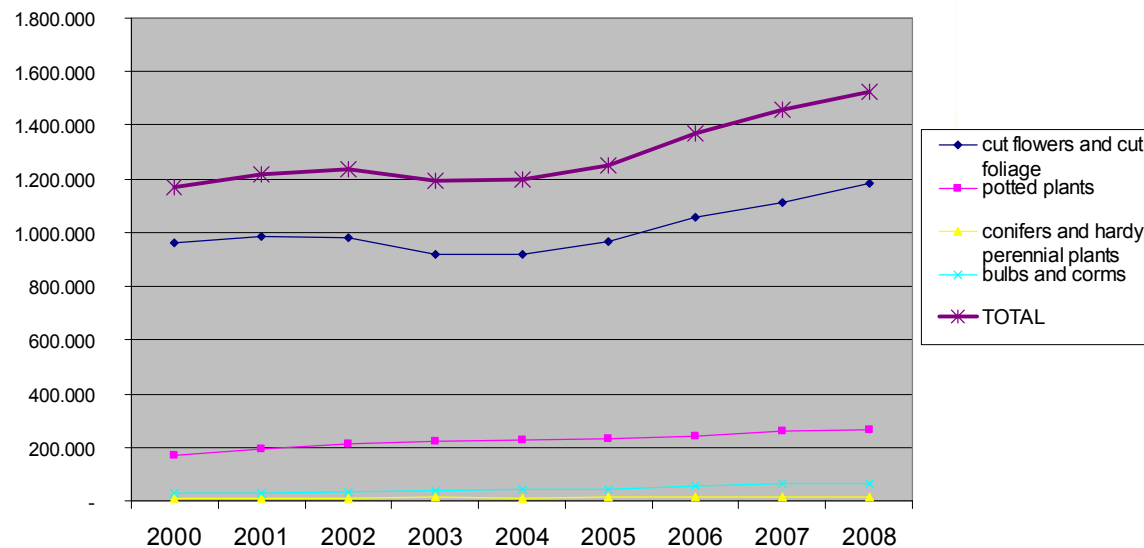
⇒ Imports from third countries represent 17.6% of total deliveries (in volumes)

⇒ 461000 tonnes in 2008

- 71% cut flowers and cut foliage
- 23% potted plants
- 4% bulbs and corms
- 2% conifers and hardy p.

⇒ Growth halted in 2008: - 1.1% mainly due to conifers (-48%)

Imports of live plants and products of floriculture (in thousand Euros)



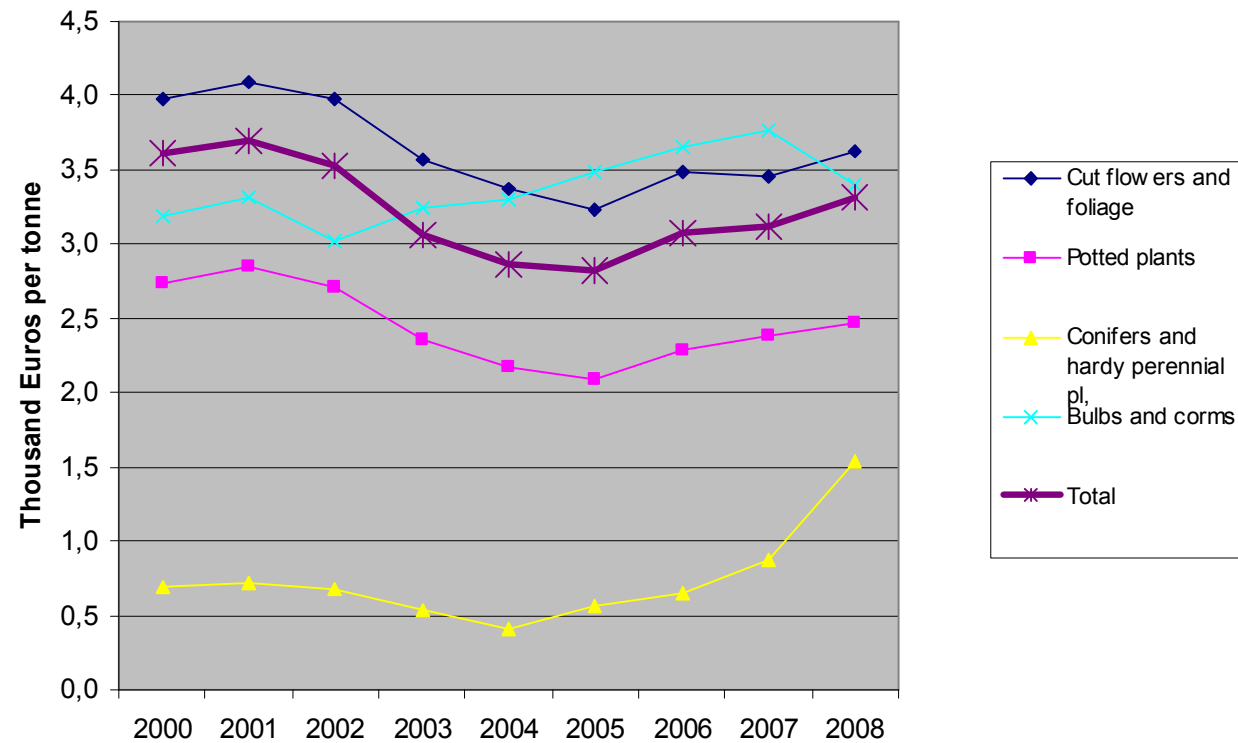
Source: Eurostat Comext

⇒ **1.5 billion Euros in 2008**

- 78% cut flowers and cut foliage
- 17% potted plants
- 4% bulbs and corms
- 1% conifers and hardy p.

⇒ **+4.8% due to the increase of cut flowers and cut foliage (+6.5%)**

Prices of imports of live plants and products of floriculture (in thousand Euros per tonne)

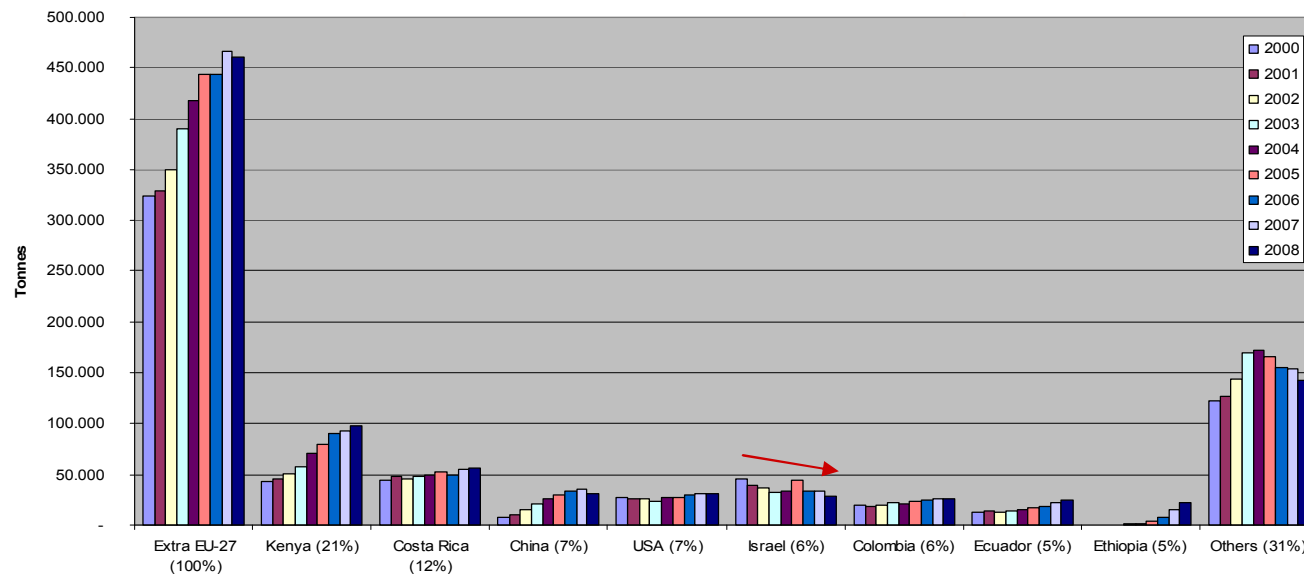


Source: Eurostat Comext

⇒ Increase for all categories during the past three years

⇒ Except for bulbs and corms in 2008 (-10%)

Imports of live plants and products of floriculture by country (in tonnes)



- ⇒ Upgoing trend over the past 8 years for all the countries
- ⇒ Except for Israel
- ⇒ Kenya is the main country of origin (21%), focussed on cut flowers and cut foliage (98%)
- ⇒ Costa Rica is the second country (12%). Its offer is more diversified:
 - 39% cut flowers and cut foliage
 - 60% potted plants

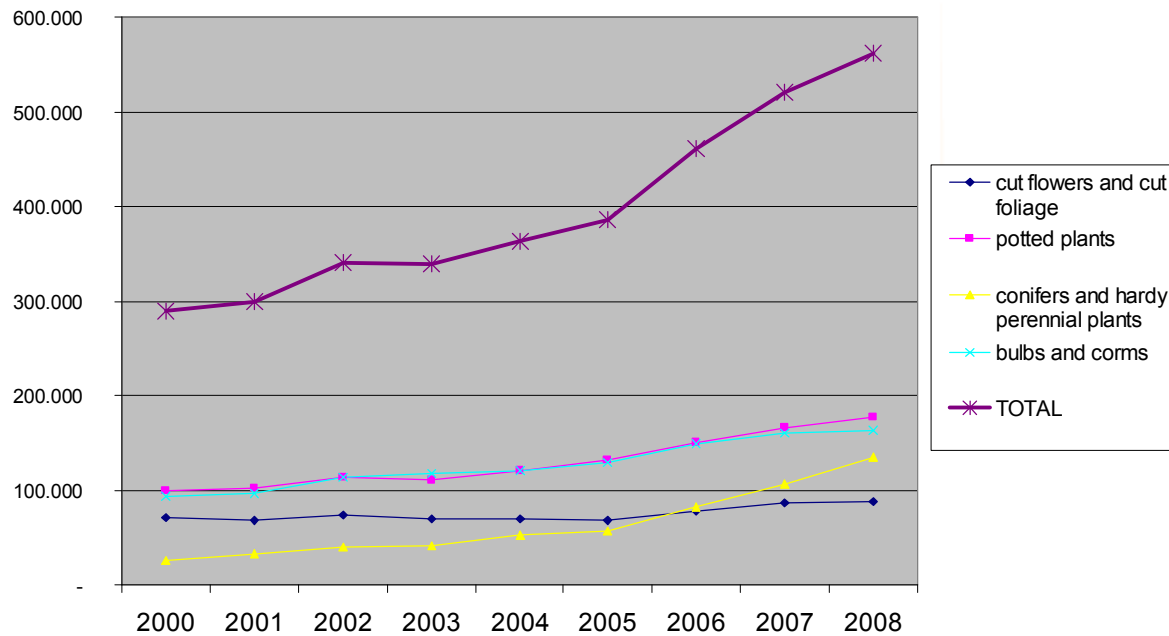


Source: Eurostat Comext



3.2 Export

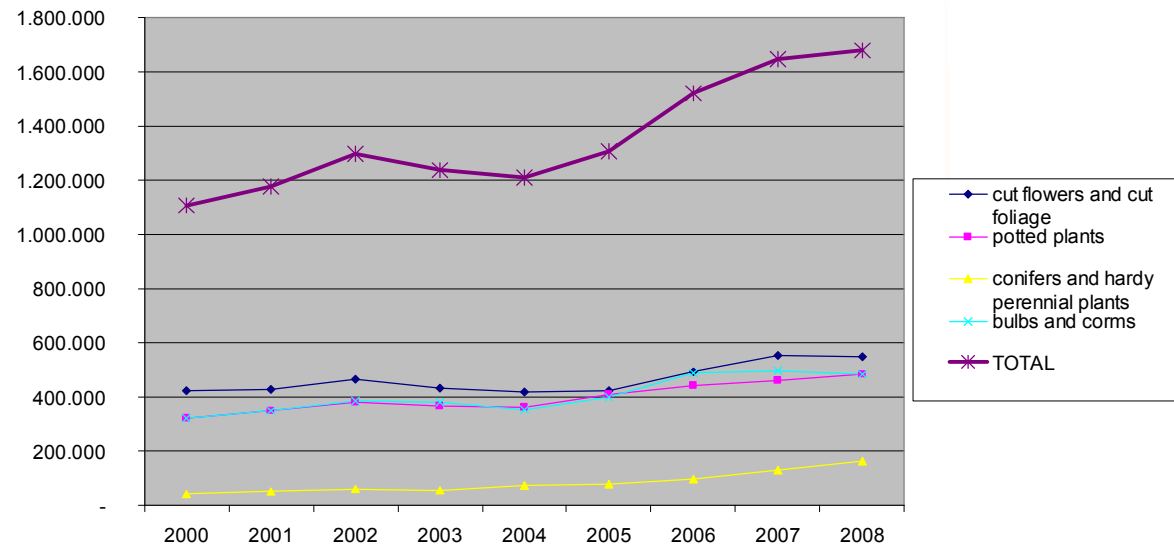
Exports of live plants and products of floriculture (in tonnes)



Source: Eurostat Comext

- ⇒ **561700 tonnes in 2008**
- ⇒ **A diversified offer:**
 - 31% potted plants
 - 29% bulbs and corms
 - 24% conifers and hardy p.
 - 16% cut flowers and cut foliage
- ⇒ **Steady growth 2000-2008**
- ⇒ **+7.9% vs 2007 mainly due to conifers (+25.7%)**

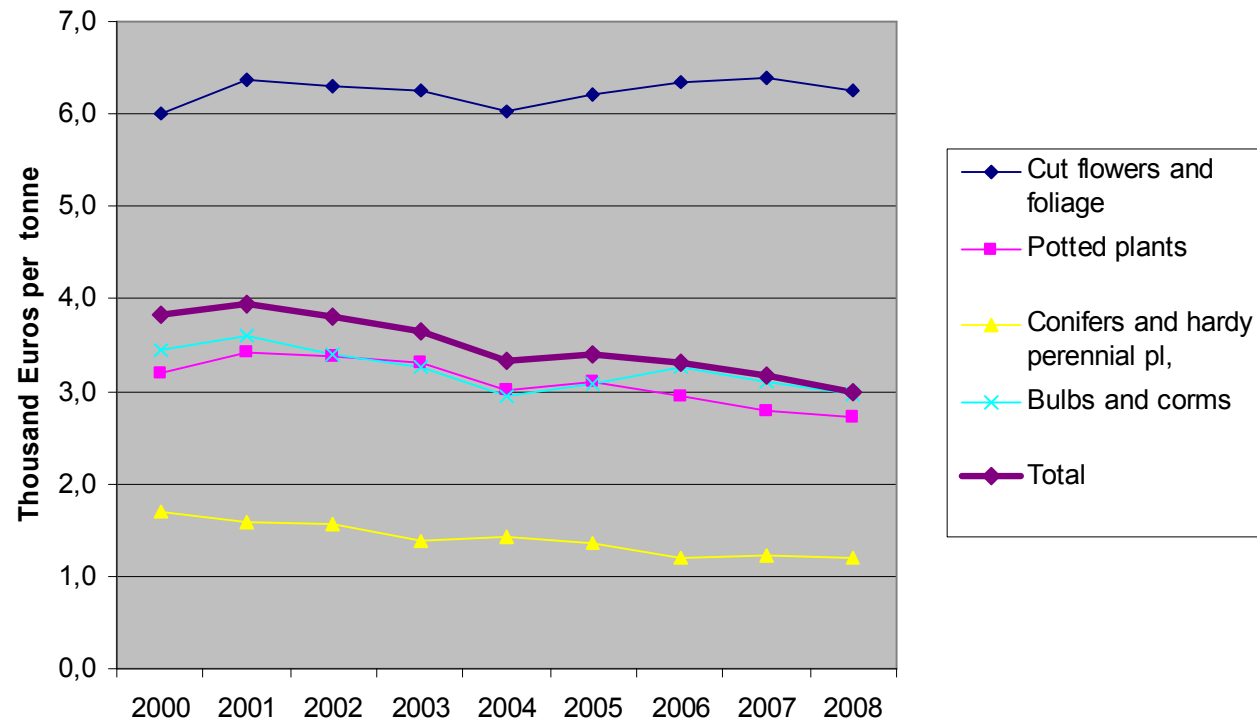
Exports of live plants and products of floriculture (in thousand Euros)



Source: Eurostat Comext

- ⇒ **1.7 billion Euros in 2008**
- 33% cut flowers and cut foliage
 - 29% potted plants
 - 10% conifers and hardy p.
 - 29% bulbs and corms
- ⇒ **+2% due to the increase of cut conifers (+23.7%)**

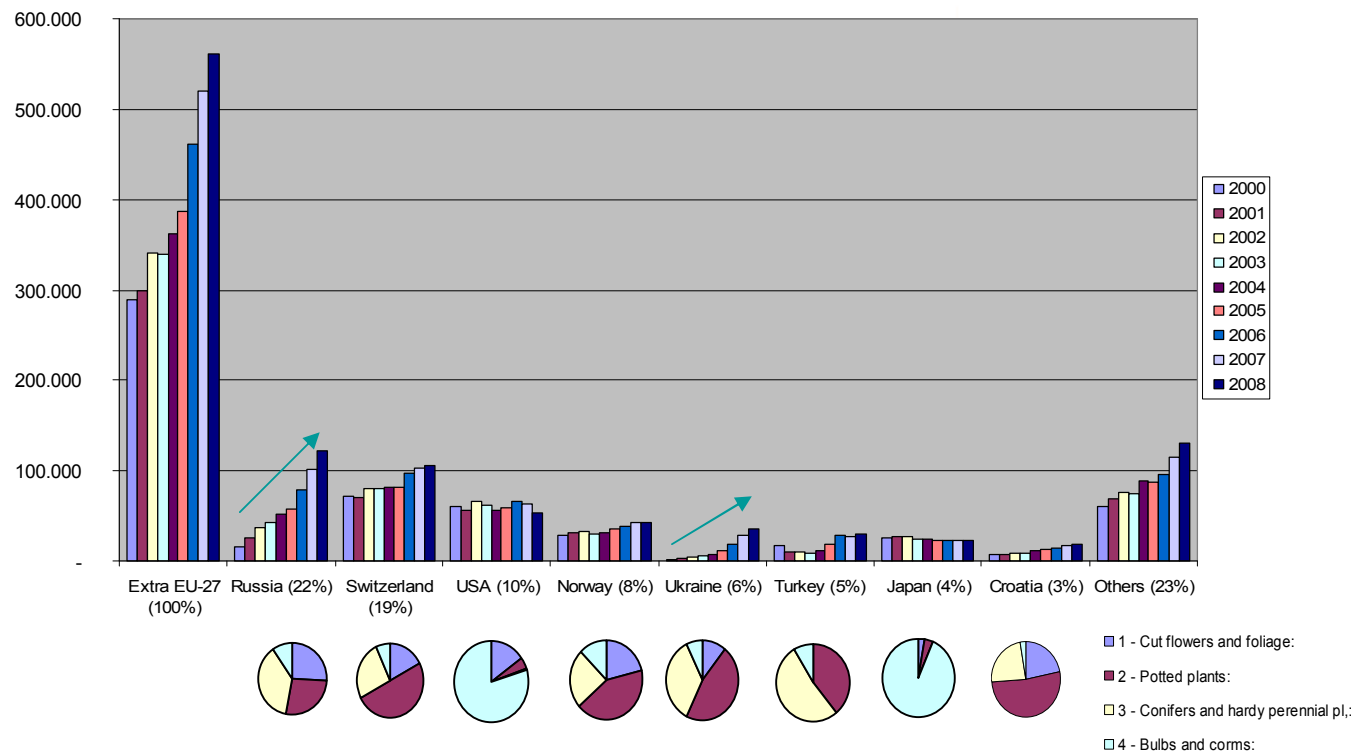
Prices of exports of live plants and products of floriculture (in thousand Euros per tonne)



- ⇒ Long term downward trend (also due to mix effect)
- ⇒ Overall decrease of 5.5% in 2008 vs 2007
- ⇒ All categories were concerned

Source: Eurostat Comext

Exports of live plants and products of floriculture by country (in tonnes)



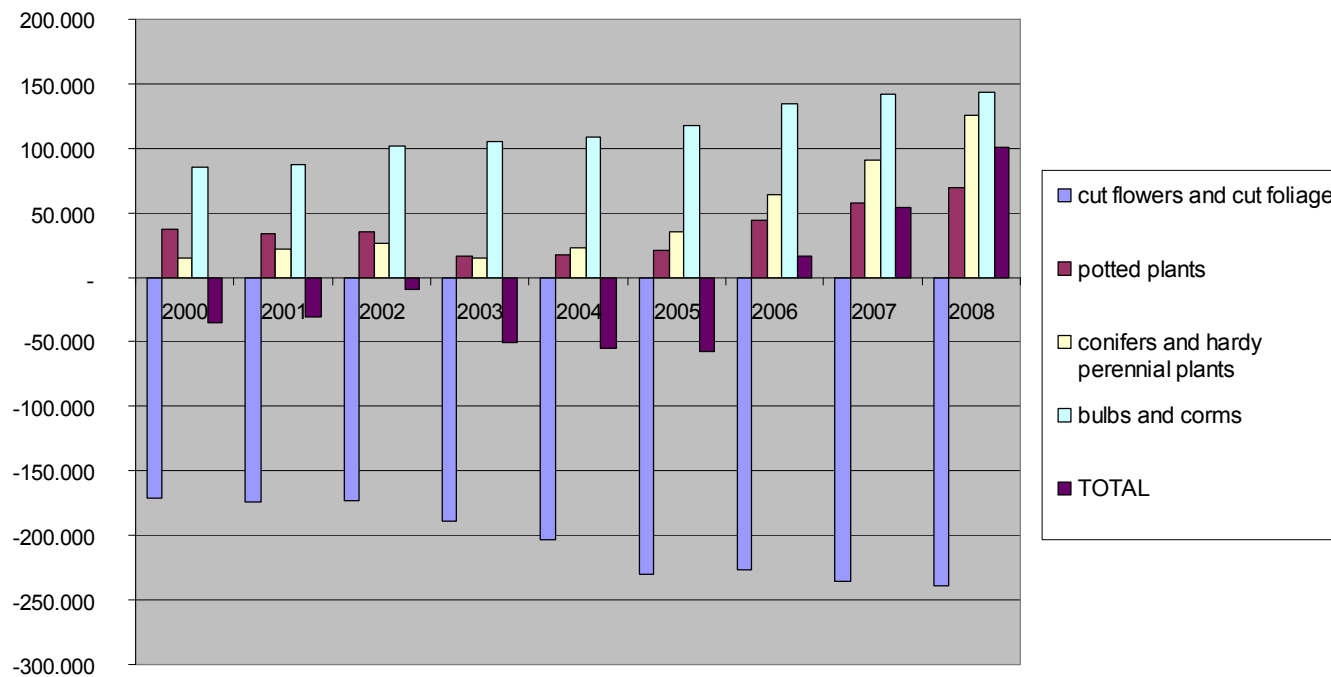
- ⇒ Upgoing trend for most of the countries
- ⇒ Russia is the first destination (22%) and the main contributor to the growth of exports (x 7.5 over the period 2000-2008)
- ⇒ Switzerland is the second country of destination overall and the first one for potted plants
- ⇒ Ukraine accounts only for 6% of exports but is registering high growth rates
- ⇒ The USA and Japan are the main countries of destination for bulbs. Their trend is steady

Source: Eurostat Comext



3.3 Trade balance

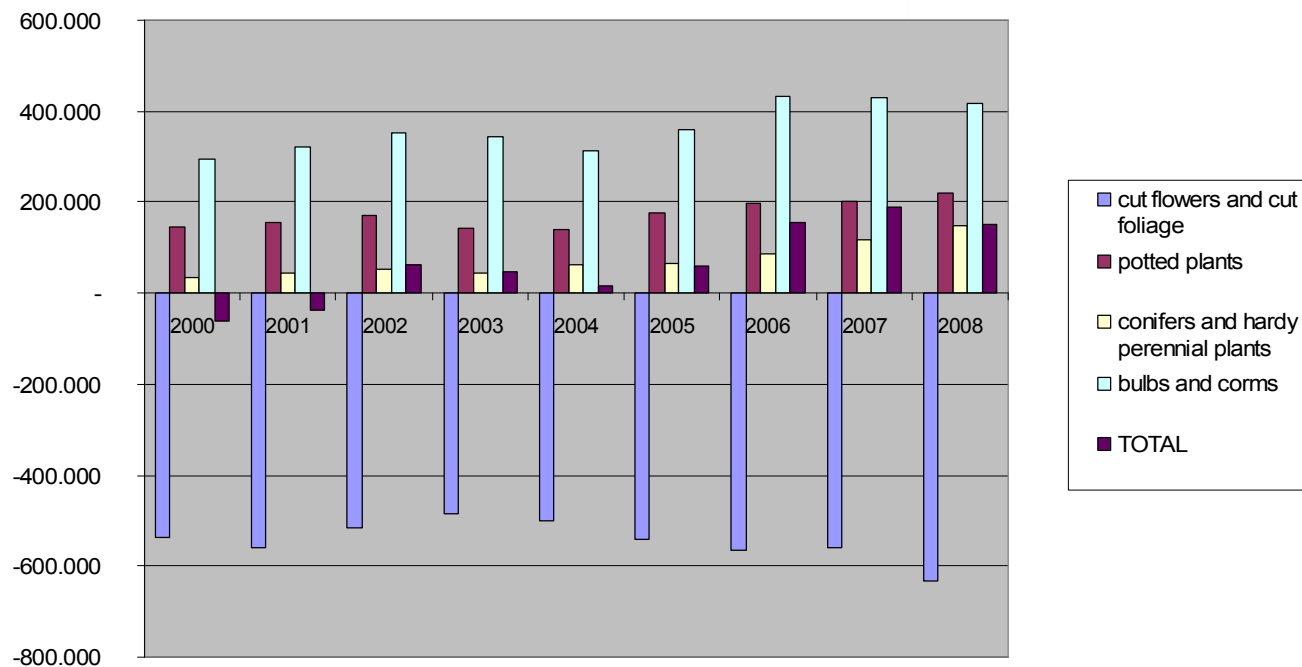
Trade balance of live plants and products of floriculture (in tonnes)



Source: Eurostat Comext

- ⇒ Positive balance since 2006
- ⇒ 100700 tonnes in 2008
- ⇒ EU27 is a net importer of cut flowers and cut foliage
- ⇒ EU27 is a net exporter of the remaining categories, for which the balance is increasing

Trade balance of live plants and products of floriculture (in thousand Euros)



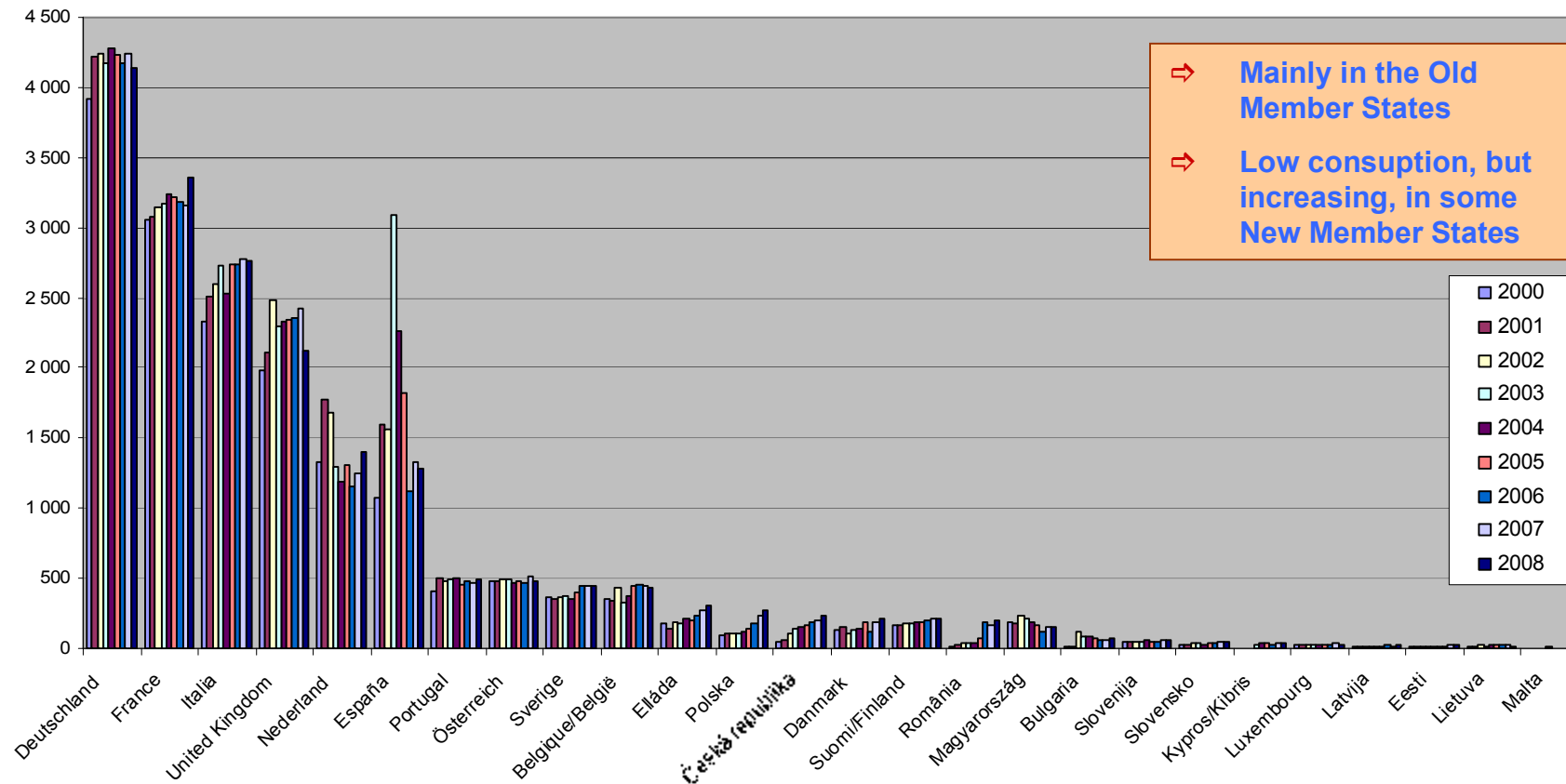
Source: Eurostat Comext

- ⇒ Positive balance since 2002
- ⇒ 151 million Euros in 2008
- ⇒ EU27 is a net importer of cut flowers and cut foliage
- ⇒ EU27 is a net exporter of the remaining categories



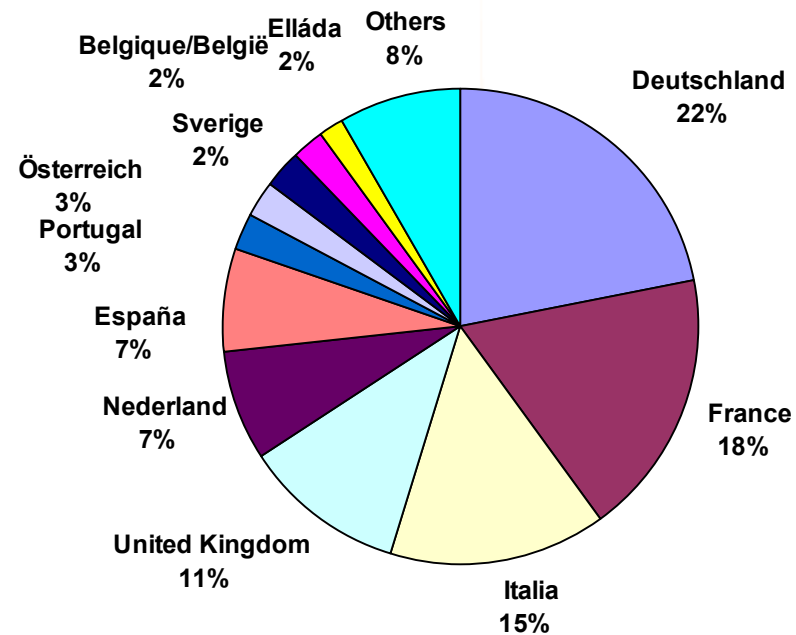
4. CONSUMPTION

Consumption of live plants and products of floriculture (in million Euros)



Source: Eurostat Comext
Consumption = production + net imports

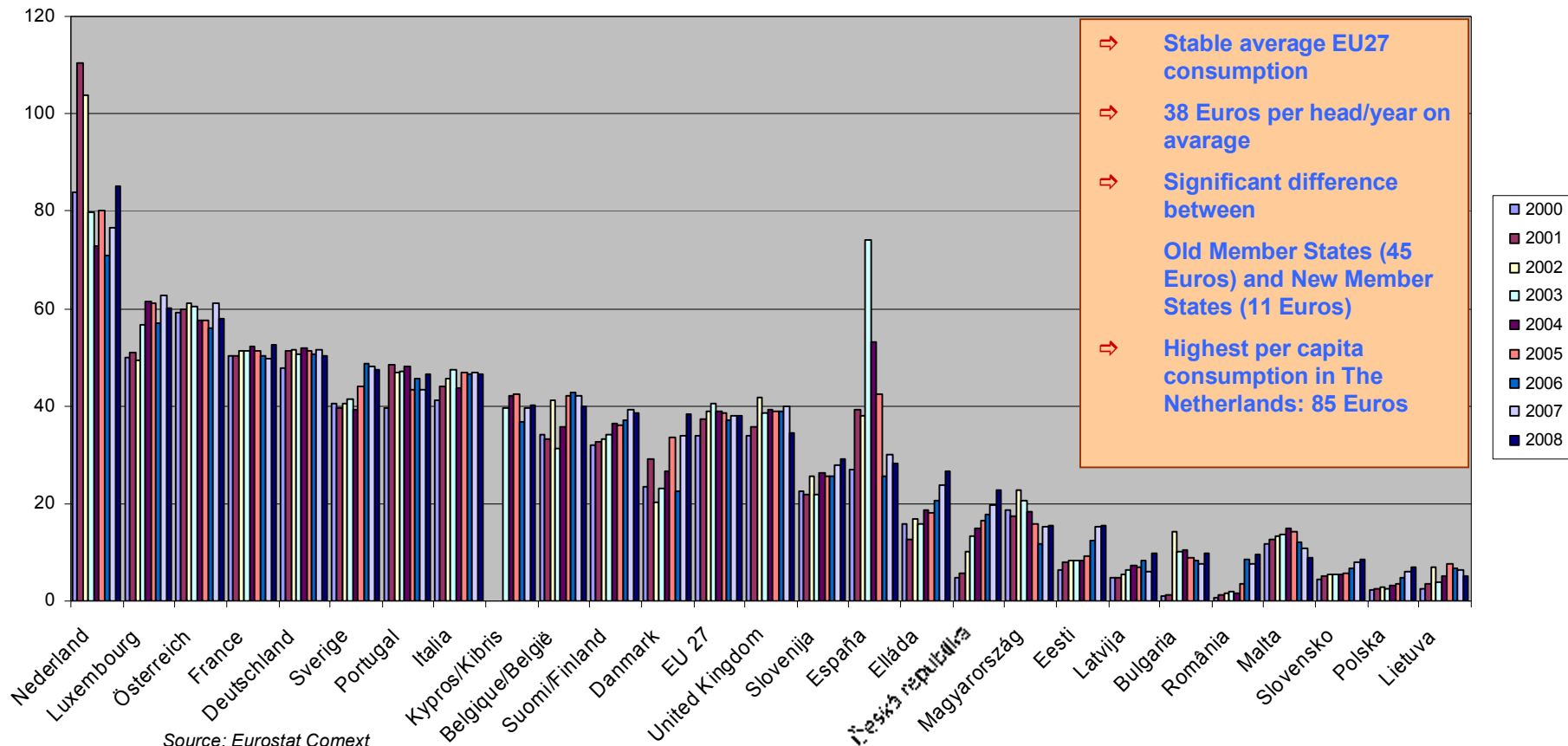
Share of Member States in total EU consumption in 2008 (shares of value)



⇒ Consumption is concentrated in the Old Member States

Source: Eurostat Comext
Consumption = production + net imports

Consumption of live plants and products of floriculture per capita (in Euros)



Source: Eurostat Comext
 Consumption per capita = (production + net imports)/population

Live plants and products of floriculture



THANK YOU

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