



European Commission
Agriculture and Rural Development



Live plants and products of floriculture sector in the EU

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

Management Committee – Brussels – 16 October 2012



Structure of the presentation

1. *Production*
2. *Land area*
3. *Number of holdings*
4. *Trade: imports, exports and balance*



1. PRODUCTION

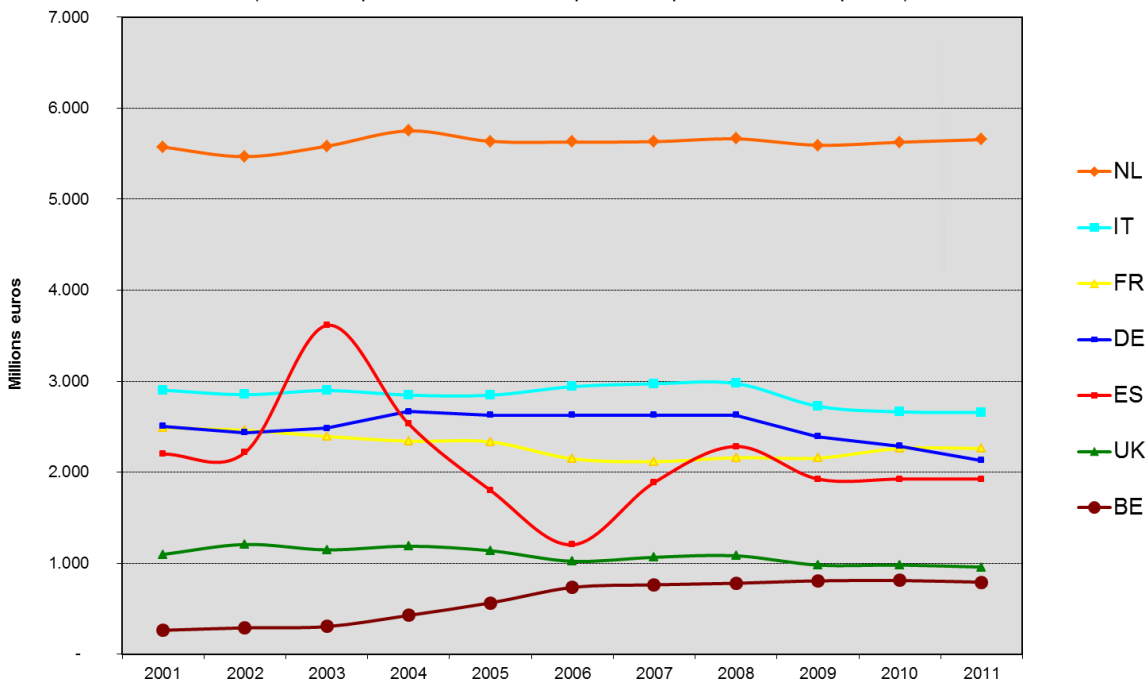


Value of the production of plants and flowers



European Commission
Agriculture and Rural Development

Production of flowers and plants in the EU
(based on production values at producer prices, constant prices)



Source: EUROSTAT

2011: provisional / estimated data

Plants and flowers = ornamental plants and flowers + nursery plants + Christmas trees and plantations.

- ⇒ Estimated at 19.8 billion EUR in 2011
- ⇒ -2,6% vs 2010 at constant prices
- ⇒ Main producers (and trend vs 2010 at constant prices)
 - NL 33% (+0,5%)
 - IT 13% (-0,2%)
 - FR 12% (=)
 - DE 12% (-7%)
 - ES 11% (=)



2. LAND AREA

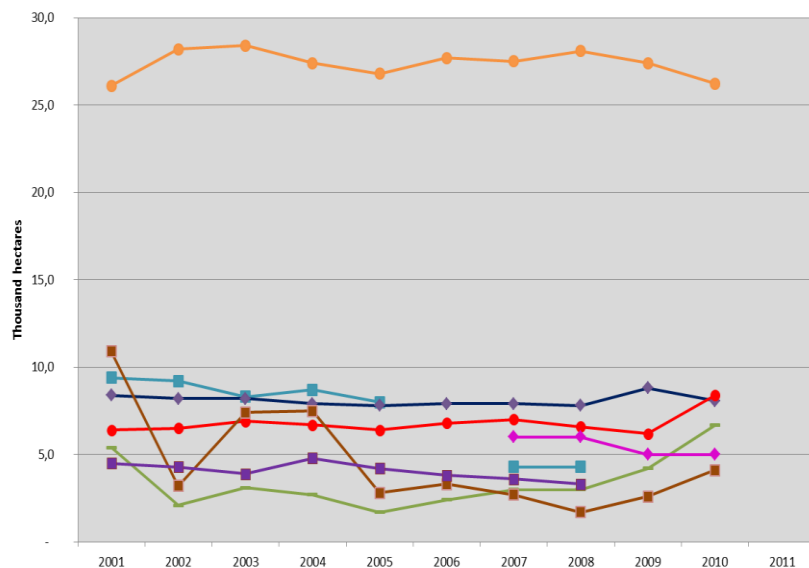


Land area



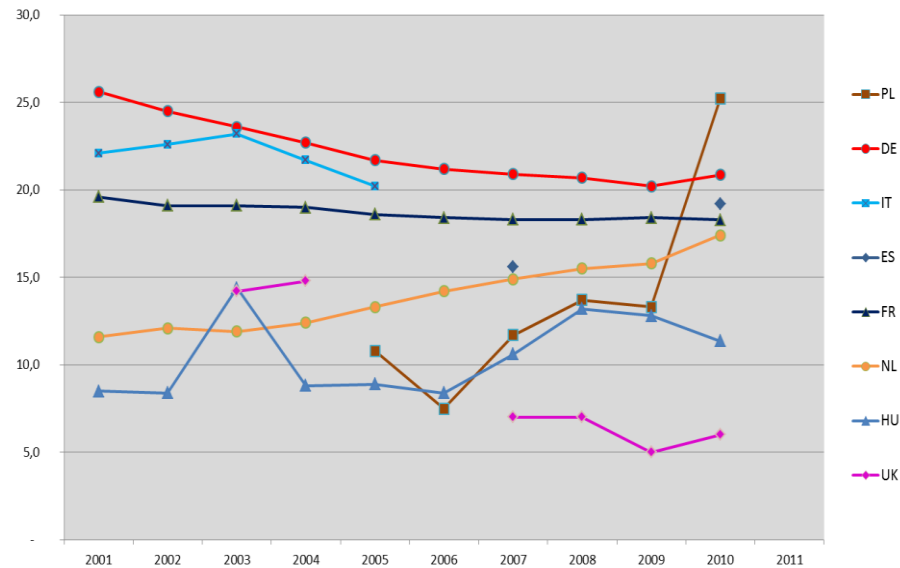
European Commission
Agriculture and Rural Development

Land area Flowers and ornamental plants (including seeds)



Source: Eurostat

Land area Hardy nursery stocks (including vine stocks)



Total EU land area estimated at 200 thousand hectares (complete data not available)

Flowers and ornamental plants

- ⇒ NL about 40% of total, stable in the long run
- ⇒ Increase in recent years in DE, ES and PL

Hard nursery stocks

- ⇒ Constant growth in NL
- ⇒ Opposite trend in DE
- ⇒ Huge growth in PL in 2010(?!)

Live plants and products of floriculture



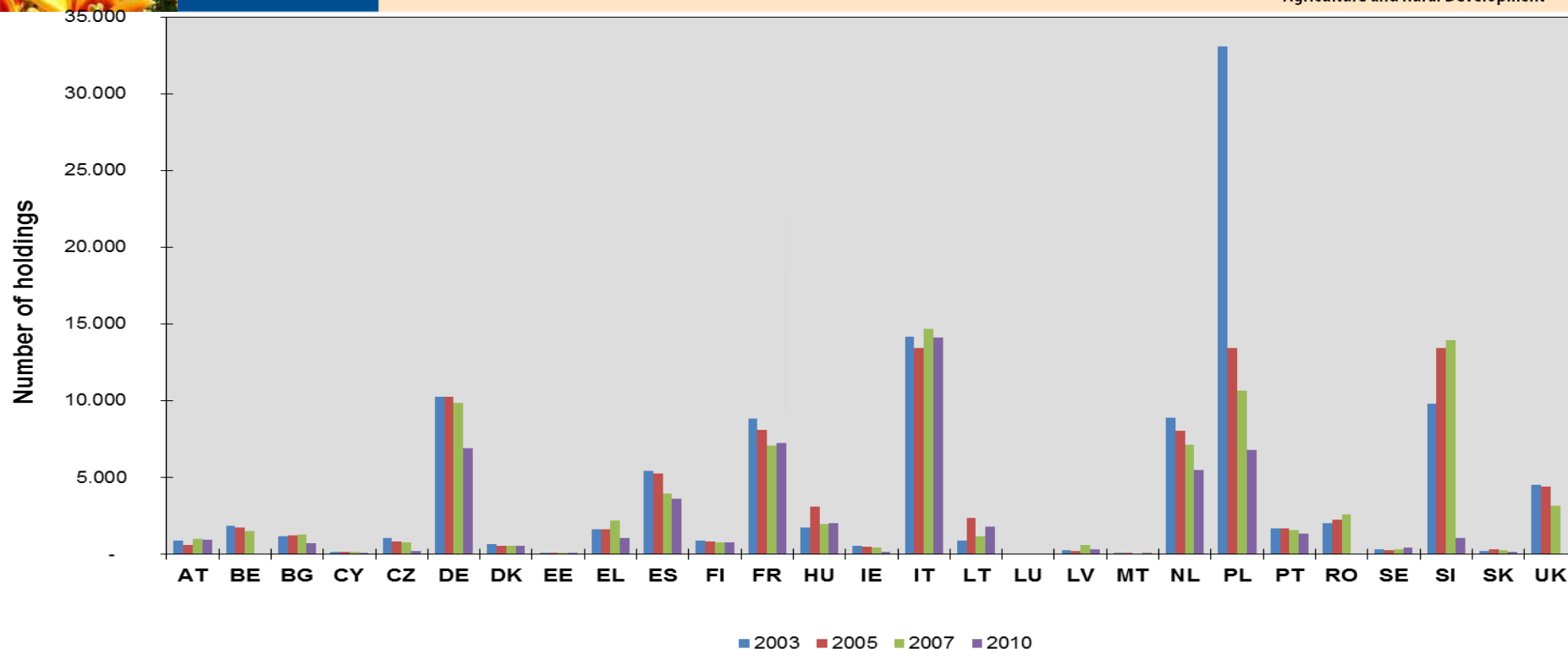
3. NUMBER OF HOLDINGS



Number of holdings of flowers and ornamental plants (outdoor + under glass) in the EU



European Commission
Agriculture and Rural Development



Source: Eurostat

Total number of holdings estimated at approx. 60 thousand (complete data not available), generally decreasing

Significant decrease in SI (?! It is being checked), PL, DE, NL and ES versus 2010

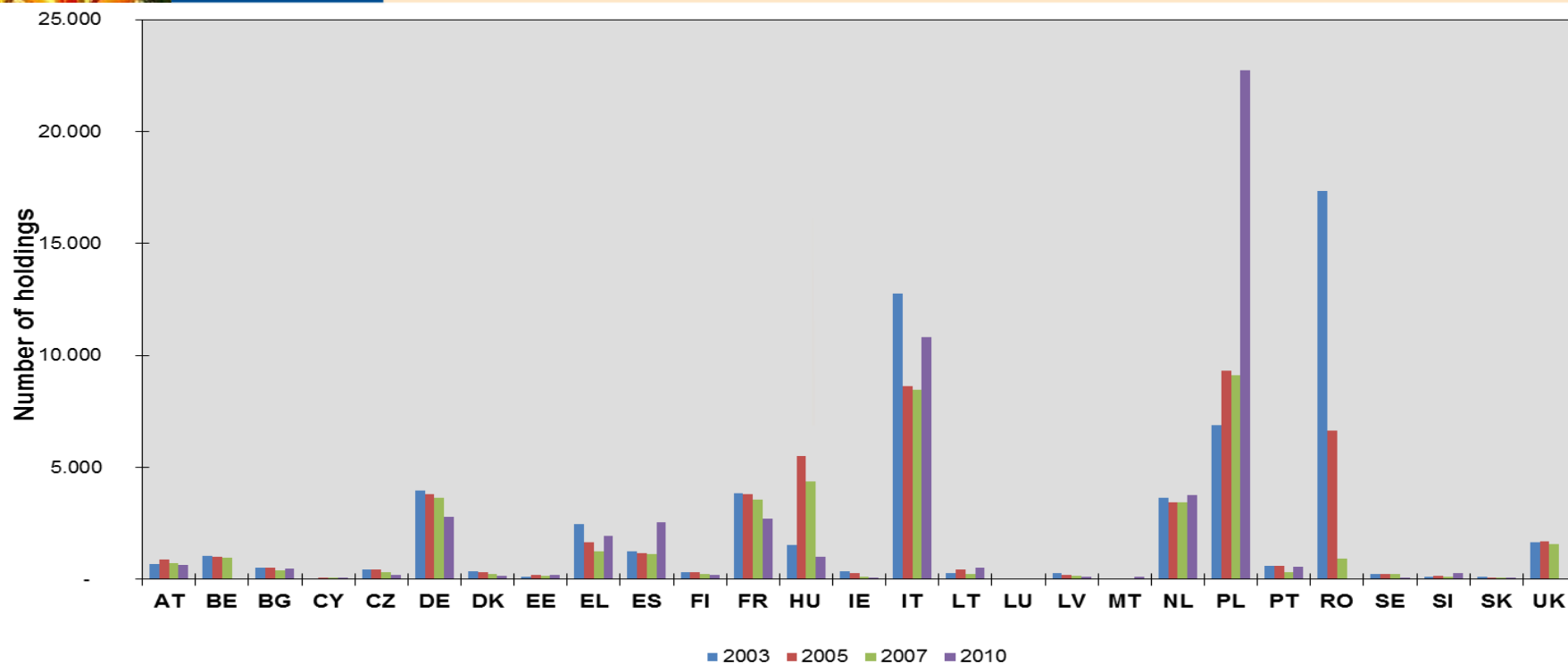
Slight increase in LT and FR



Number of holdings of nurseries in the EU



European Commission
Agriculture and Rural Development



Source: Eurostat

Total number of holdings estimated at approx. 55 thousand (complete data not available), generally increasing

Increase versus 2010 in PL, IT, ES and EL

Sharp decrease in HU, slight decrease in FR and DE



4. TRADE

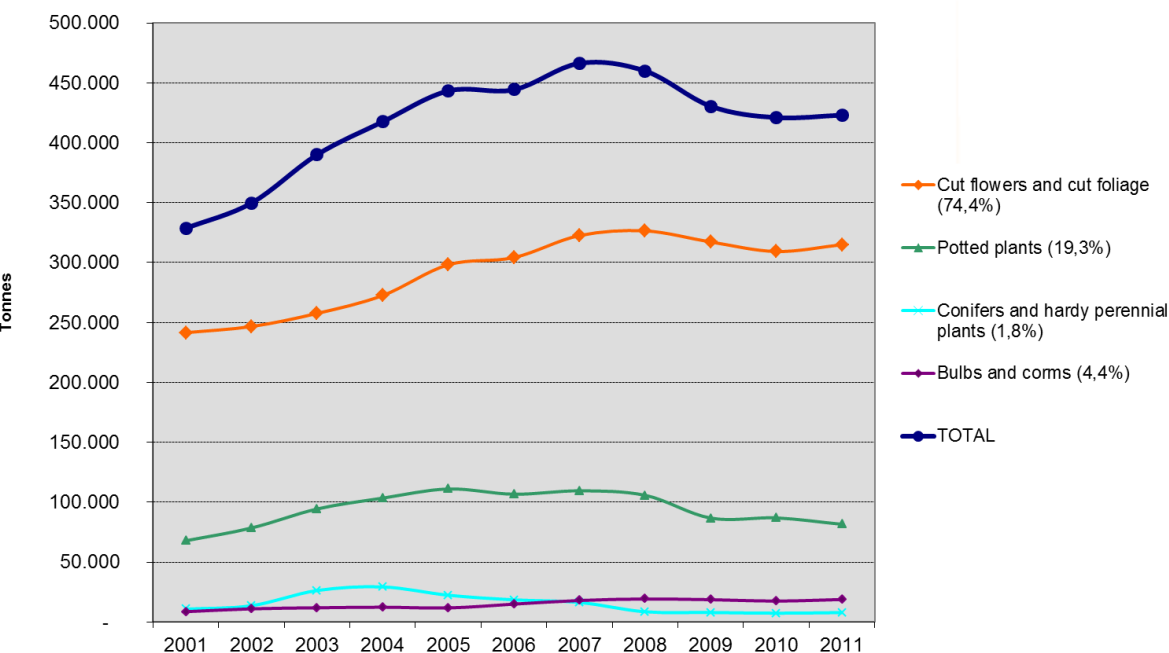


Imports of live plants and products of floriculture



European Commission
Agriculture and Rural Development

Imports of live plants and products of floriculture
(in tonnes, % = share in 2011)



Source: Eurostat Comext

- ⇒ 423,000 tonnes/1.55 billion EUR in 2011
- ⇒ After a long term growth, imports started decreasing in 2008.
- ⇒ Slight increase in 2011 (+0.7%) for all categories except pot plants (-5.8%)
- ⇒ Increase in value by 3.2%

First semester 2012:
-4,6% vol, +1,1% val

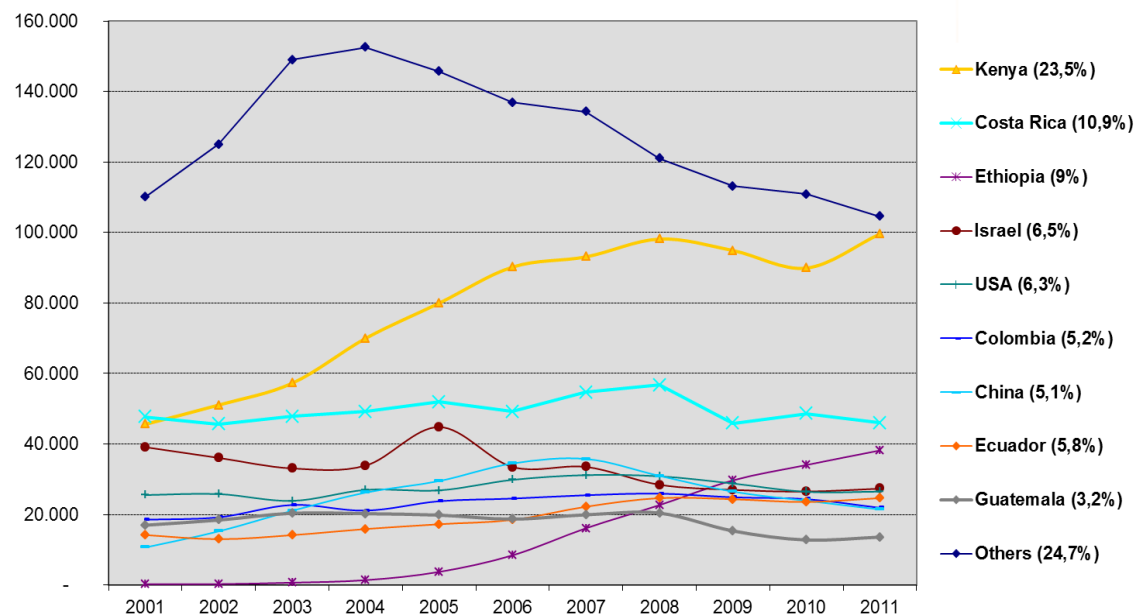


Imports by country of origin



European Commission
Agriculture and Rural Development

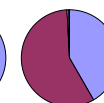
Total import by country of origin
(in tonnes)



Source: Eurostat Comext

⇒ Constant growth of imports from Kenya and Ethiopia (mainly cut flowers)

Kenya Costa Rica Ethiopia Others



- 1 - Cut flowers and foliage:
- 2 - Potted plants:
- 3 - Conifers and hardy perennial pl.:
- 4 - Bulbs and corms:

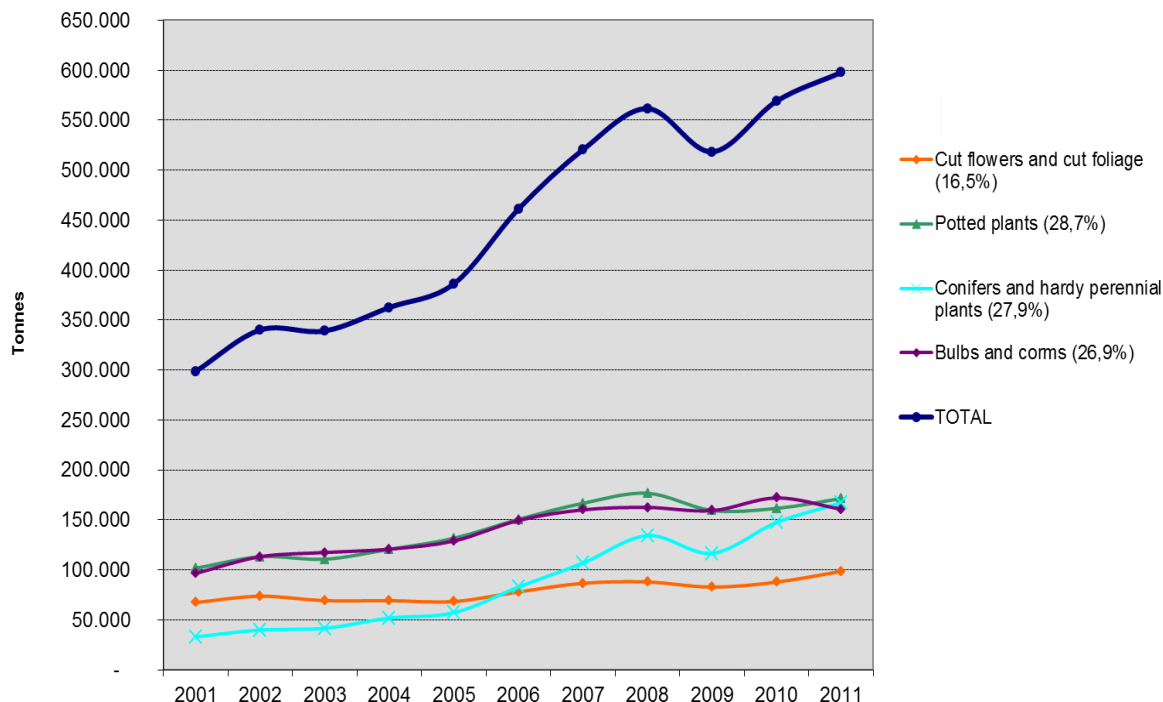


Exports of live plants and products of floriculture



European Commission
Agriculture and Rural Development

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



Vol:

- ⇒ 598,000 tonnes
- ⇒ After the drop-off in 2009 (mainly towards Russia), exports of all categories restarted to grow in 2010
- ⇒ Growth for all categories in 2011 (by 5% on average), except for bulbs and corms (-6,6%).

Val:

- ⇒ 1.75 billion EUR in 2011
- ⇒ Growth by 4,9%
- ⇒ NL represents 74% of exports, +4,6% vs 2010
- ⇒ IT 6% (-2,9%), DE 6% (+10%)

First semester 2012:
+10,6 % vol, +11,8% val

Source: Eurostat Comext

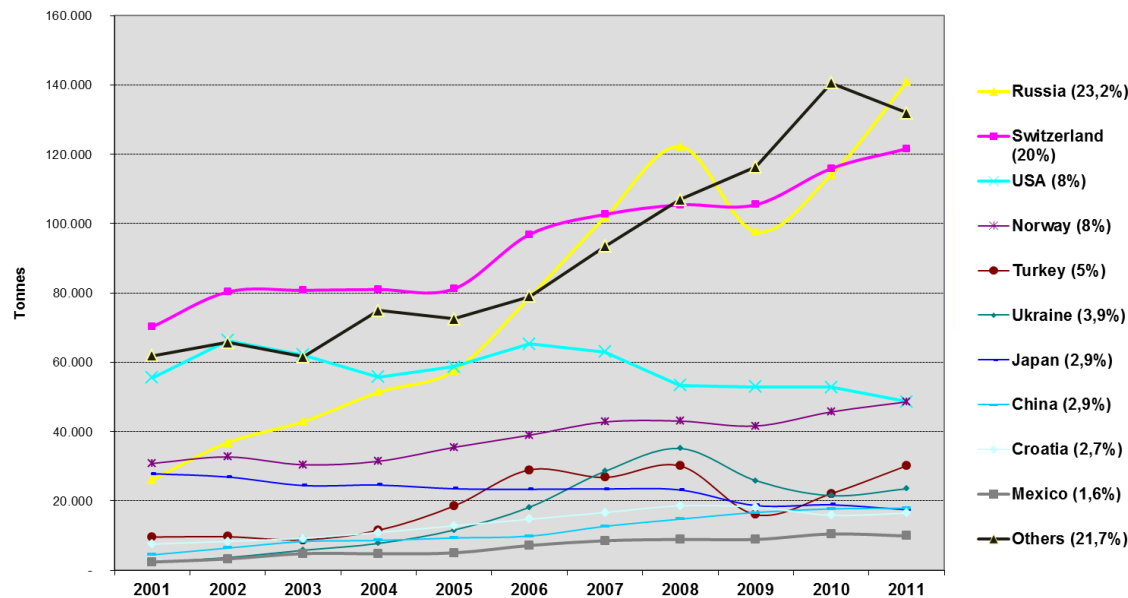


Exports by country of destination



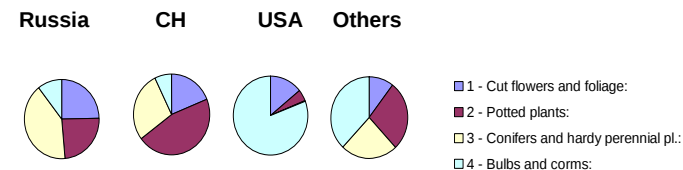
European Commission
Agriculture and Rural Development

Total exports by country of destination
(in tonnes)



⇒ **Main partners: Russia (23,2%) and CH (20%)**

⇒ **Exports increased in 2011 towards all the main destinations, except for USA and Japan (decrease in bulbs and corms exports)**



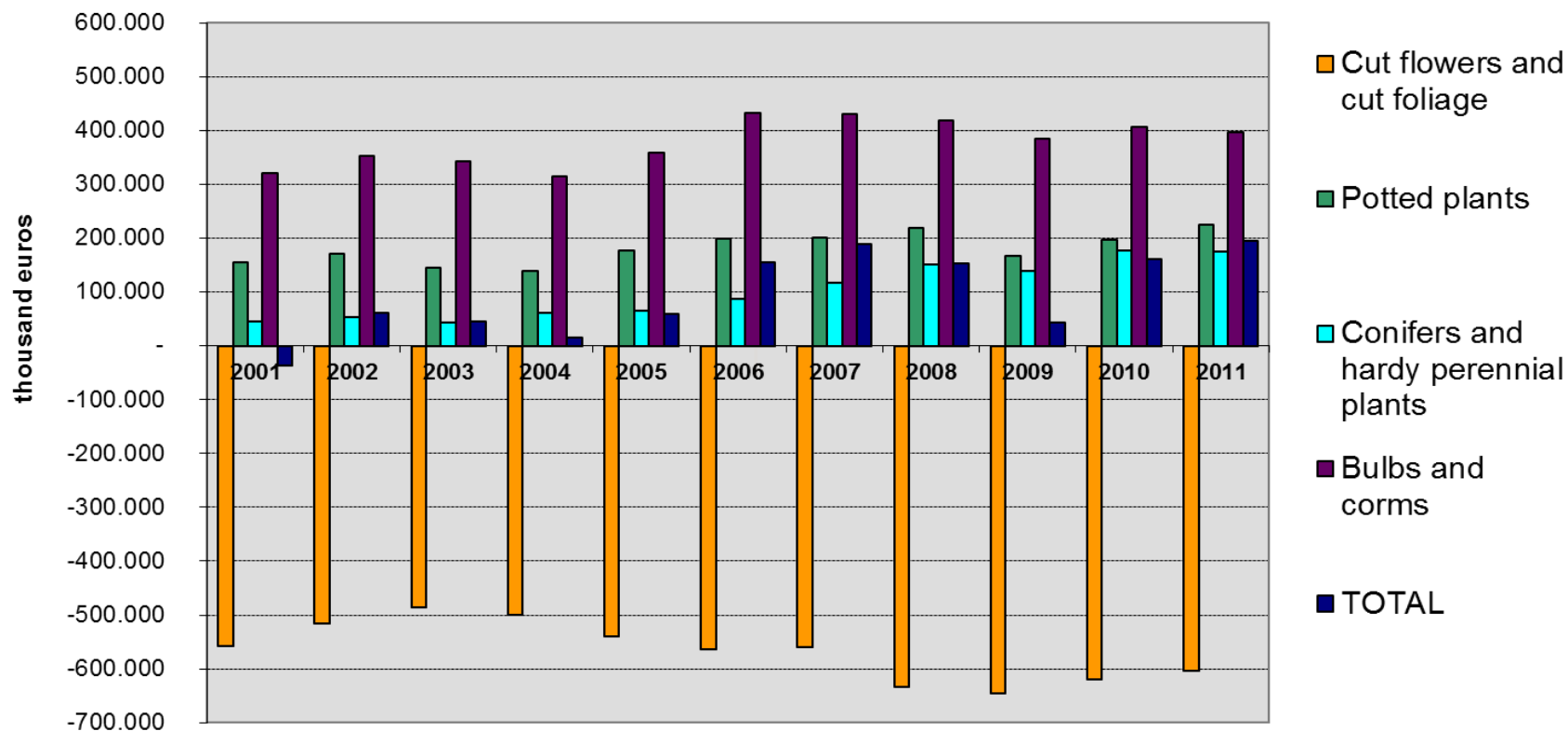
Source: Eurostat Comext



Trade balance of live plants and products of floriculture (in thousand euros, at current prices)



European Commission
Agriculture and Rural Development



⇒ Positive trade balance since 2002. 194 mio EUR in 2011

⇒ Trade balance is constantly negative on cut flowers and cut foliage



Exports and deliveries in 2011

% on value



European Commission
Agriculture and Rural Development

Destination	Exporter											% of imports
	Netherlands	Germany	Italy	Belgium	Denmark	Spain	France	Poland	Portugal	Other MS	Total EU	
Netherlands	-	28,1%	12,9%	40,7%	9,7%	17,3%	22,3%	20,7%	28,4%	10,6%	691.134	7,1%
Germany	26,3%	-	22,8%	5,5%	35,9%	10,8%	10,2%	22,2%	0,9%	7,5%	2.153.568	22,2%
Italy	6,4%	3,1%	-	2,1%	2,1%	8,4%	13,2%	0,4%	10,0%	2,3%	511.974	5,3%
Belgium	4,5%	3,2%	3,2%	-	2,4%	3,0%	5,8%	0,4%	1,5%	2,6%	368.663	3,8%
Denmark	2,1%	3,3%	1,0%	0,2%	-	0,8%	0,9%	8,5%	0,1%	2,4%	183.303	1,9%
Spain	1,6%	0,8%	3,5%	0,6%	0,2%	-	5,7%	0,9%	41,8%	0,4%	174.546	1,8%
France	12,8%	9,7%	20,4%	35,5%	4,4%	31,7%	-	1,9%	10,5%	1,4%	1.349.453	13,9%
Poland	2,4%	3,6%	0,9%	0,2%	2,0%	0,5%	0,7%	-	0,0%	1,1%	205.609	2,1%
Portugal	0,6%	0,2%	0,7%	0,1%	0,0%	8,5%	0,9%	0,3%	-	0,0%	62.027	0,6%
Utd. Kingdom	12,1%	3,1%	4,8%	8,1%	6,5%	4,7%	8,8%	3,7%	5,7%	6,7%	975.123	10,0%
Ireland	1,4%	0,4%	0,3%	0,2%	0,3%	0,0%	0,3%	0,0%	0,0%	11,9%	129.104	1,3%
Greece	0,4%	0,3%	1,5%	0,2%	0,0%	0,3%	0,6%	0,0%	0,0%	0,1%	43.779	0,5%
Luxembourg	0,1%	0,8%	0,1%	1,2%	0,2%	0,0%	0,4%	0,0%	0,0%	0,0%	20.440	0,2%
Sweden	2,3%	4,0%	0,3%	0,1%	15,3%	0,8%	0,1%	0,6%	0,0%	1,1%	255.603	2,6%
Finland	1,1%	1,9%	0,2%	0,2%	3,3%	0,0%	0,1%	0,6%	0,0%	1,3%	108.335	1,1%
Austria	2,4%	12,6%	3,4%	0,4%	1,4%	0,5%	1,1%	1,4%	0,0%	2,8%	282.899	2,9%
Malta	0,0%	0,0%	0,2%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	2.288	0,0%
Estonia	0,1%	0,2%	0,0%	0,1%	0,1%	0,0%	0,0%	0,3%	0,0%	0,5%	12.425	0,1%
Latvia	0,2%	1,2%	0,2%	0,1%	0,0%	0,0%	0,3%	2,0%	0,0%	0,8%	30.471	0,3%
Lithuania	0,2%	0,4%	0,0%	0,0%	0,0%	0,0%	0,1%	0,9%	0,0%	0,2%	17.221	0,2%
Czech Rep.	1,3%	3,0%	0,9%	0,1%	0,8%	0,1%	0,4%	2,6%	0,0%	2,9%	126.121	1,3%
Slovakia	0,4%	1,5%	0,6%	0,1%	0,3%	0,0%	0,1%	1,7%	0,0%	3,9%	53.025	0,5%
Hungary	0,7%	1,1%	0,9%	0,1%	0,4%	0,1%	0,1%	0,3%	0,0%	2,7%	70.203	0,7%
Romania	0,5%	0,7%	2,9%	0,0%	0,4%	0,7%	1,8%	0,2%	0,0%	4,0%	70.964	0,7%
Bulgaria	0,1%	0,1%	0,2%	0,0%	0,1%	0,0%	0,6%	0,1%	0,0%	0,5%	10.444	0,1%
Slovenia	0,4%	0,8%	0,6%	0,1%	0,1%	0,0%	0,2%	0,0%	0,0%	2,9%	42.307	0,4%
Cyprus	0,1%	0,4%	0,2%	0,1%	0,0%	0,0%	0,0%	1,1%	0,0%	0,2%	10.270	0,1%
Third Countries	19,5%	15,7%	17,2%	3,9%	14,1%	11,7%	25,1%	29,4%	0,9%	29,0%	1.745.426	18,0%
Total exports	6.612.511	677.388	626.215	621.127	454.664	187.272	112.205	93.796	68.137	253.411	9.706.725	100,0%
% of exports	68,1%	7,0%	6,5%	6,4%	4,7%	1,9%	1,2%	1,0%	0,7%	2,6%	100,0%	100,0%

Source: Eurostat Comext

Live plants and products of floriculture

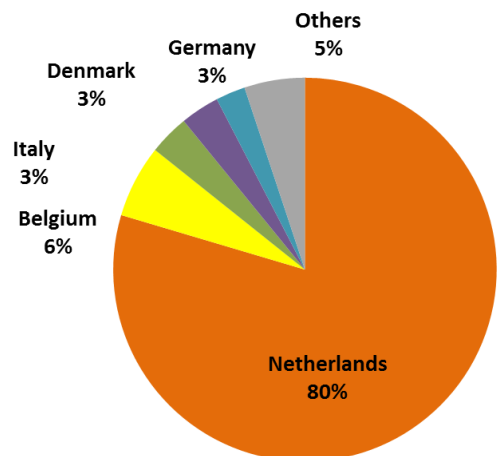


Deliveries to intra and extra EU countries in 2011 (% on value)

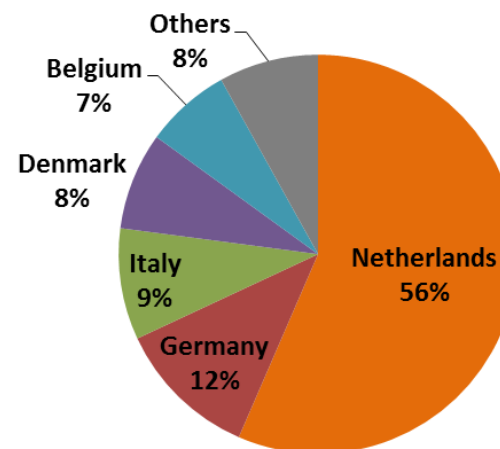


European Commission
Agriculture and Rural Development

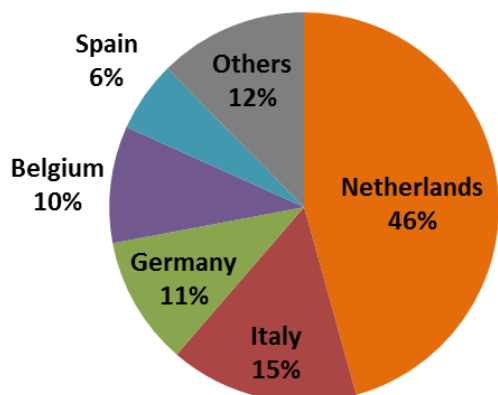
Cut flowers and foliage



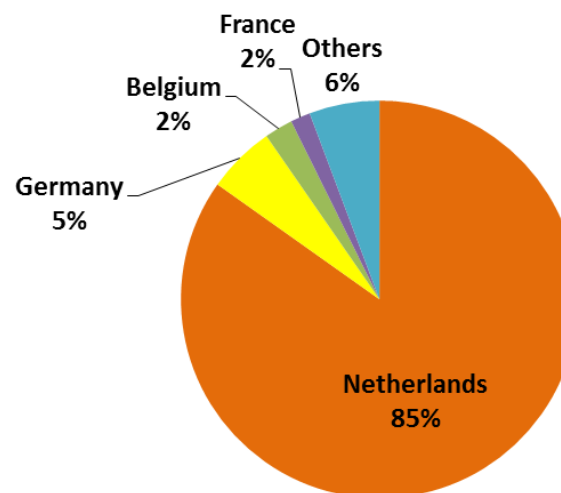
Potted plants



Conifers and hardy perennial pl



Bulbs and corms





Thank you for your attention

e-mail: aurora.ierugan@ec.europa.eu