European Commission
Agriculture and Rural Development

Live plants and products of floriculture sector in the EU (version 19/05/2011)

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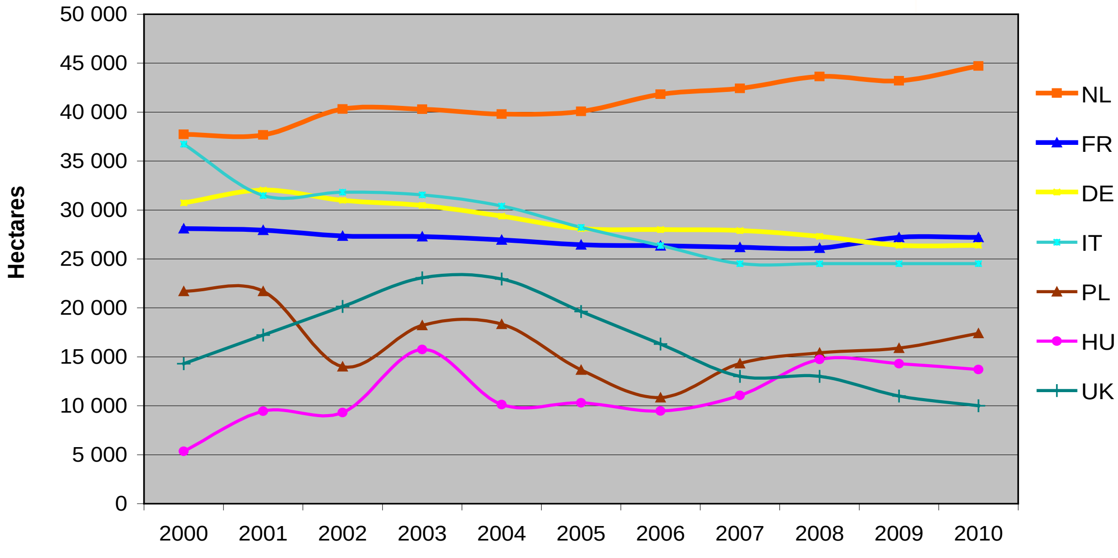
Structure of the presentation

1. *Statistical overview:*
   - *Land area*
   - *Production*
   - *Trade: Imports, Exports, Balance*
2. *EU policies*

1. STATISTICAL OVERVIEW

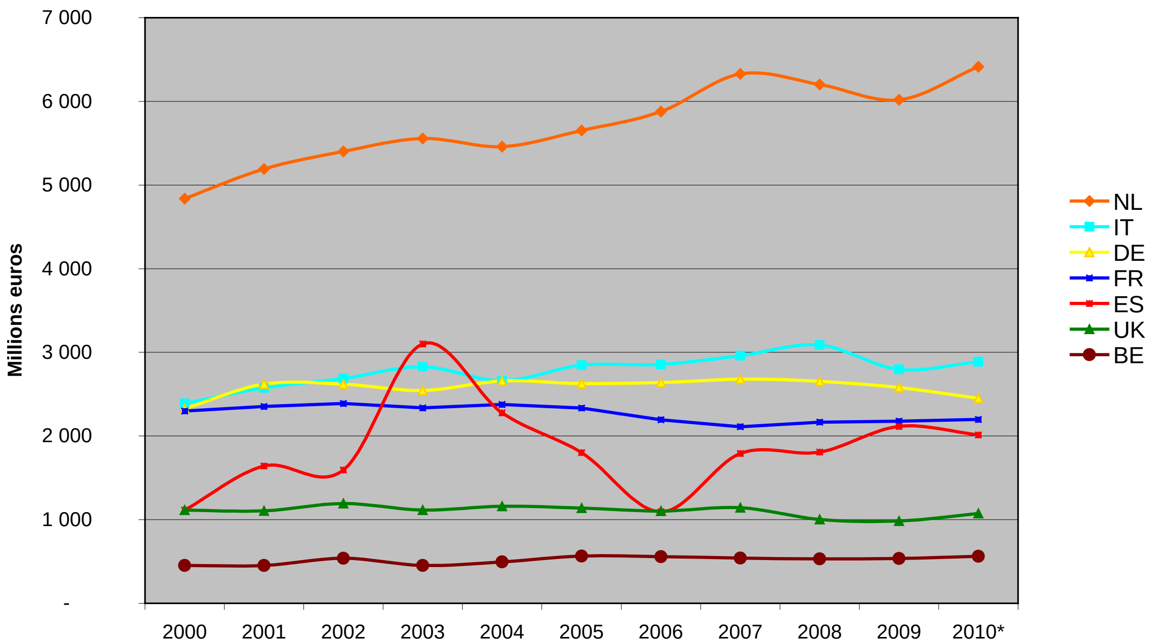
Land area of flowers, ornamental plants and nursery plants



Source of data: Eurostat
NB: data are not available for all the countries and all the years. Some of them are estimated (namely 2010)

- *Estimated at 196.000 ha in 2010*
- *Highly concentrated in the Old Member States:*
  - *NL 44.700 ha,*
  - *FR 27.200 ha,*
  - *DE 26.400 ha,*
  - *IT 24.520 ha,*
  - *PL 17.400 ha.*
- *EU 27 stable vs 2009*
- *Main changes:*
  - *NL + 3,5%, PL + 9,4%;*
  - *UK – 9,1%, DK – 8,9%*
- *Long run declining trend, except for NL.*

Value of the production of plants and flowers

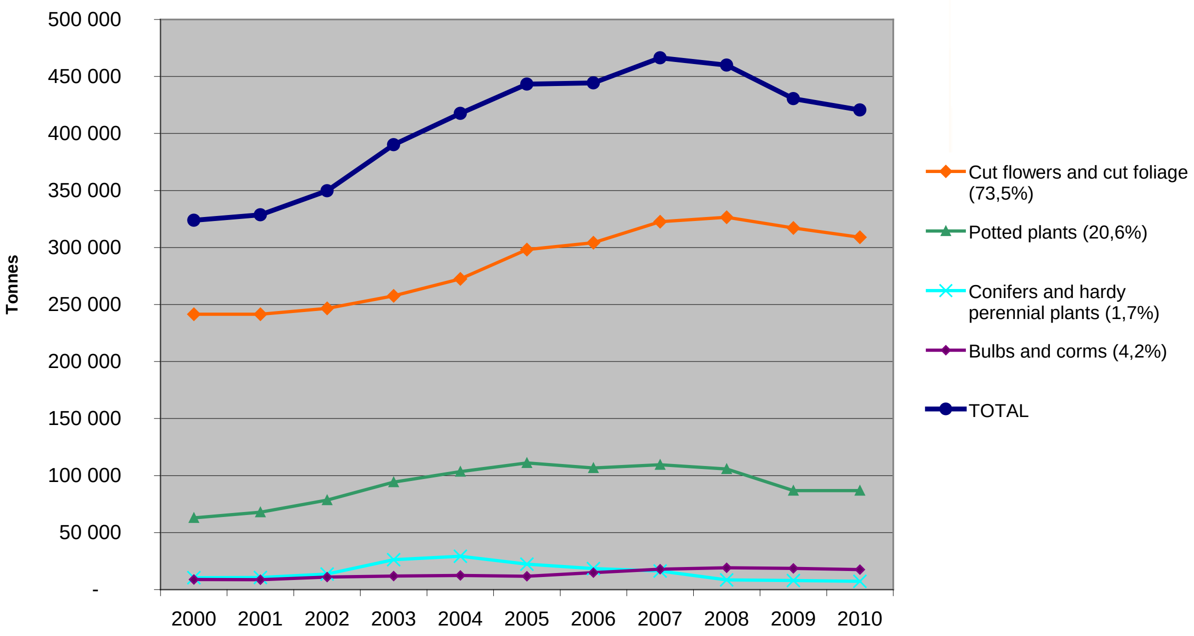


Source: Eurostat and DG AGRI C.2 estimates

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

- *Estimated at 19,7 billion Euros in 2010*
- *Main producers:*
  - *NL 33%*
  - *IT 15%*
  - *DE 12%*
  - *FR 11%*
  - *ES 10%*
- *EU27: Growth in the long run, stopped in 2009. Back to a positive trend in 2010: + 2%*
  - *OMS +2%*
  - *NMS +4% (influenced by the exchange rate)*
- *Main contributors to the increase:*
  - *NL+ 6,6%, IT + 3,2%, FR +1%*
  - *Decrease in DE – 5% and ES -4,9%.*

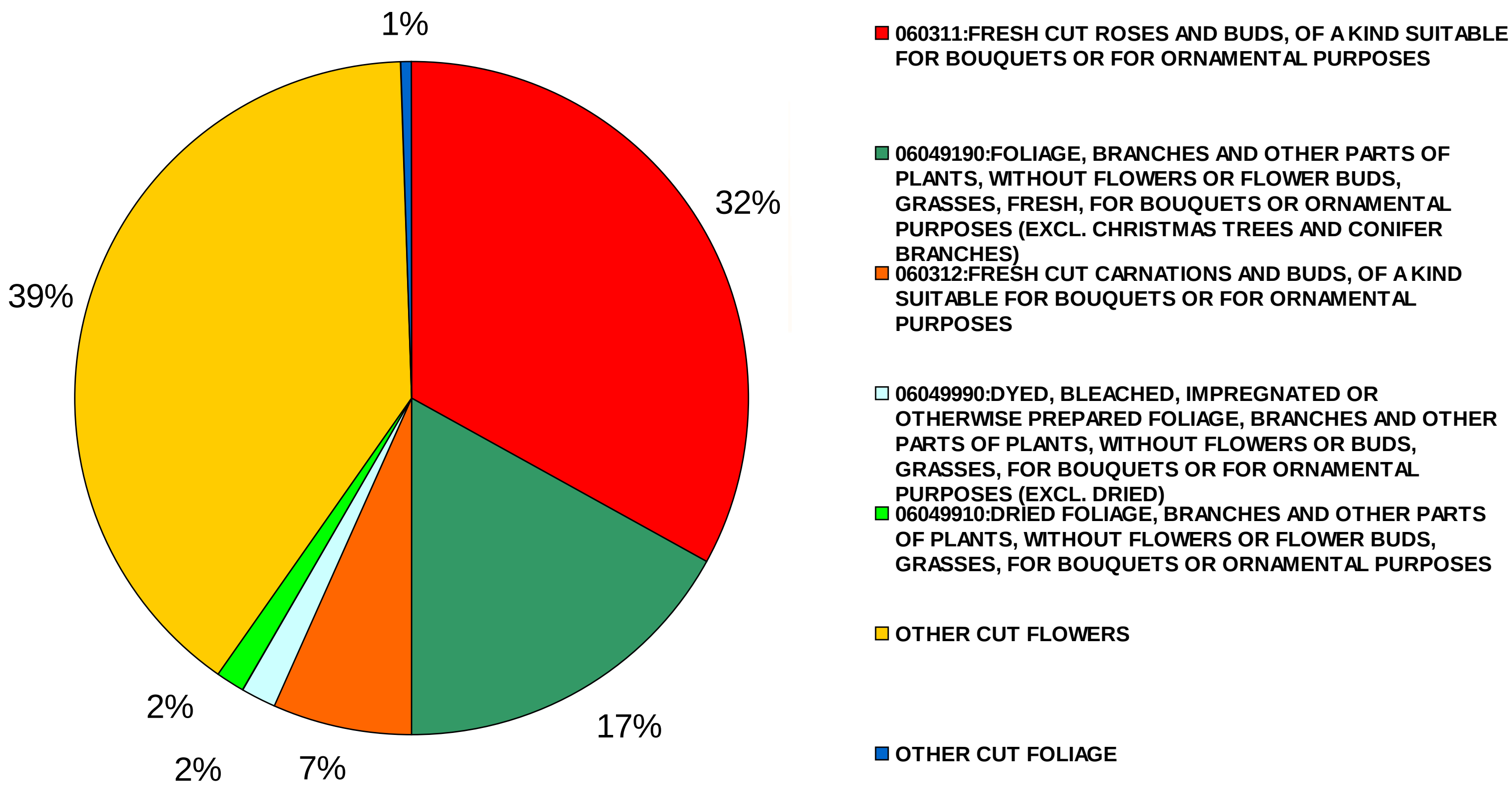
Imports of live plants and products of floriculture



- *420.000 tonnes / 1,5 billion euros in 2010*
- *Imports are focussed on cut flowers and cut foliage (73%) and potted plants (21%)*
- *After a long term growth, imports started decreasing in 2008.*
- *The decrease by 2,3% registered in 2010 vs 2009 was mainly due to cut flowers and cut foliage (-2,6%)*
- *In terms of value, imports increased by 3,6% in 2010.*

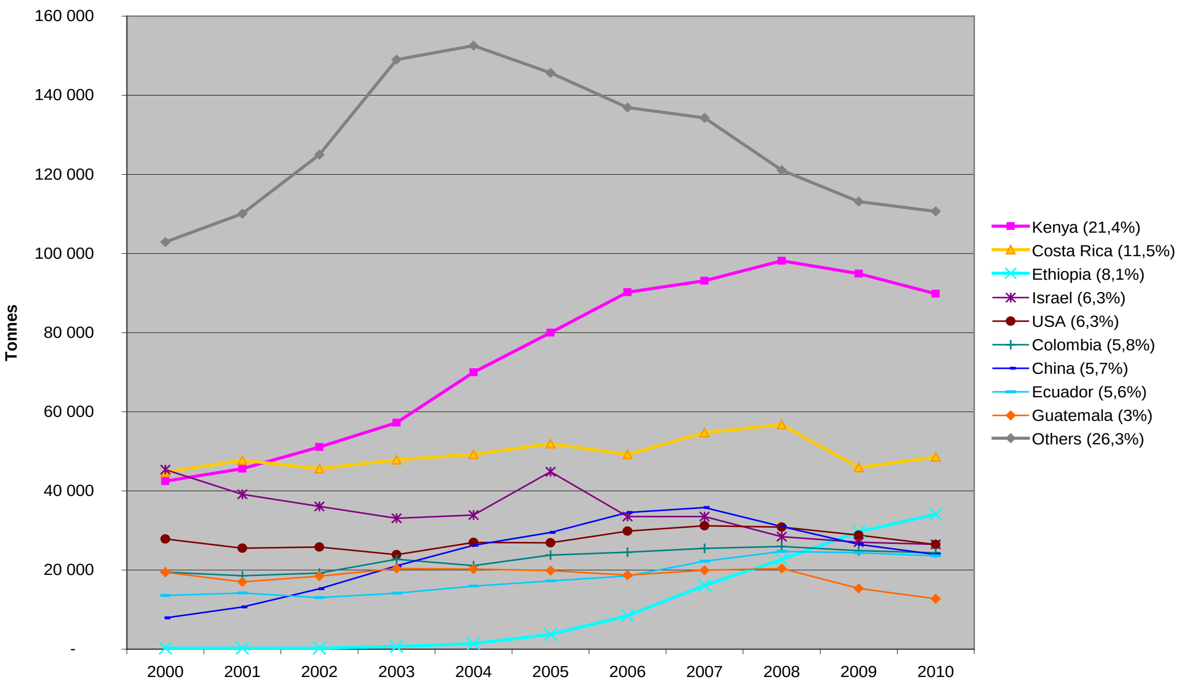
Source: Eurostat Comext

Imports of cut flowers and cut foliage (%, in 2010)

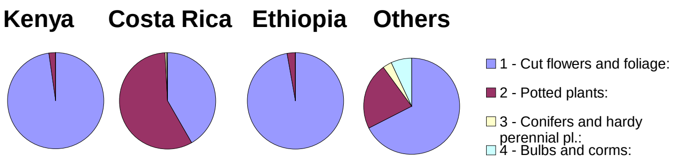


Source: Eurostat Comext

Imports by country of origin

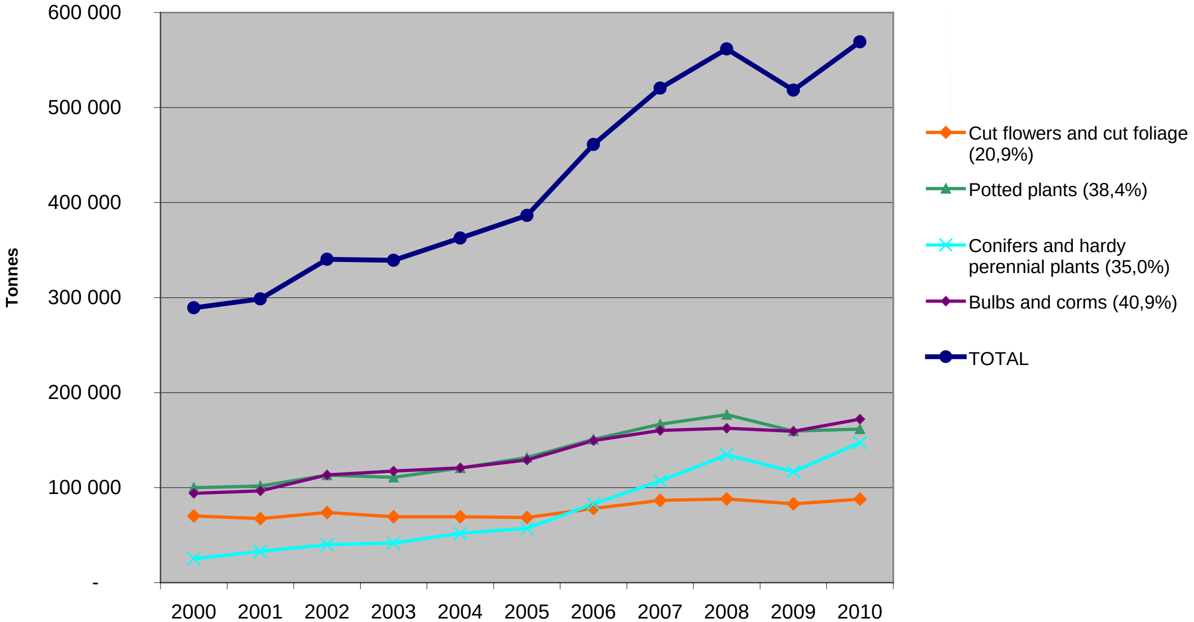


- *Kenya is the main supplier, accounting for 21,4% of EU imports. Its offer is focussed on cut flowers (98%).*
- *Costa Rica represents 11,5% of EU imports (58% potted plants / 42% cut flowers and cut foliage)*
- *Imports decreased from all countries of origin, except for Ethiopia (+14,7%) and Costa Rica (+5,8%).*



Source: Eurostat Comext

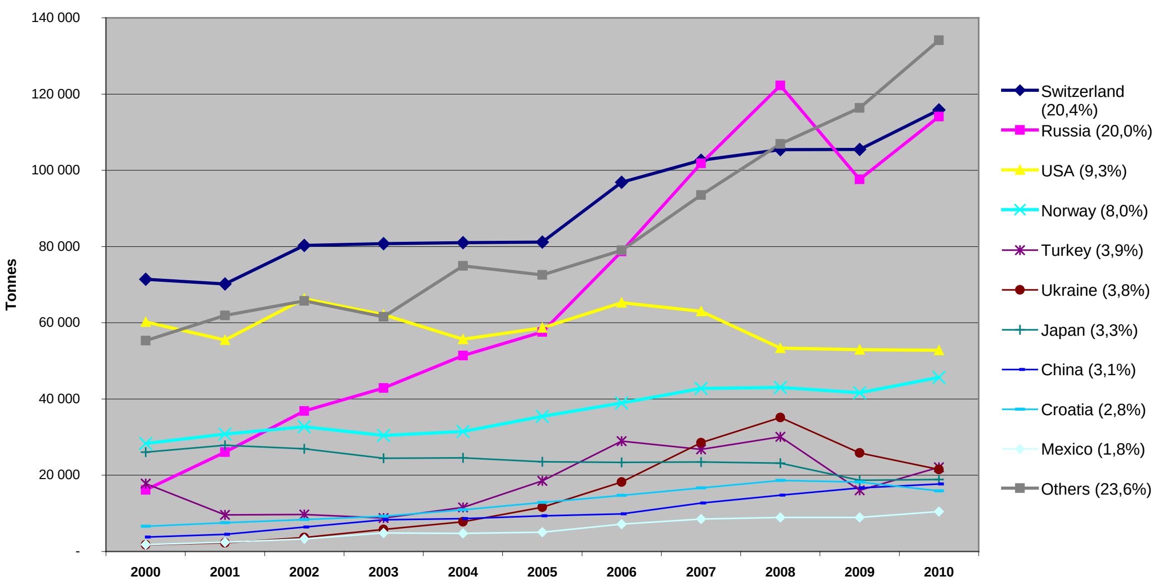
Exports of live plants and products of floriculture



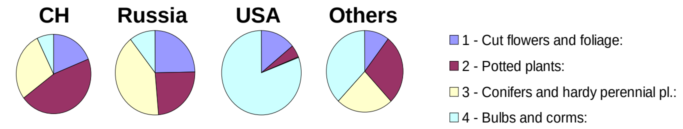
- *570.000 tonnes / 1,6 billion euros in 2010*
- *After the drop-off in 2009 (mainly towards Russia), exports of all categories restarted to grow in 2010 (overall +9,8% in tonnes, +11,5% in value)*
- *The growth concerned all categories, in particular conifers and hardy perennial plants (+26%)*
- *In 2010, bulbs and corms became the first category exported (40,9%), followed by potted plants (38,4%).*

Source: Eurostat Comext

Exports by country of destination



- *Main partners: CH (20,4%) and Russia (20,0%)*
- *Exports increased in 2010 towards all the main destinations.*
- *Significant recovery of exports to Russia (+16,8%).*



Source: Eurostat Comext

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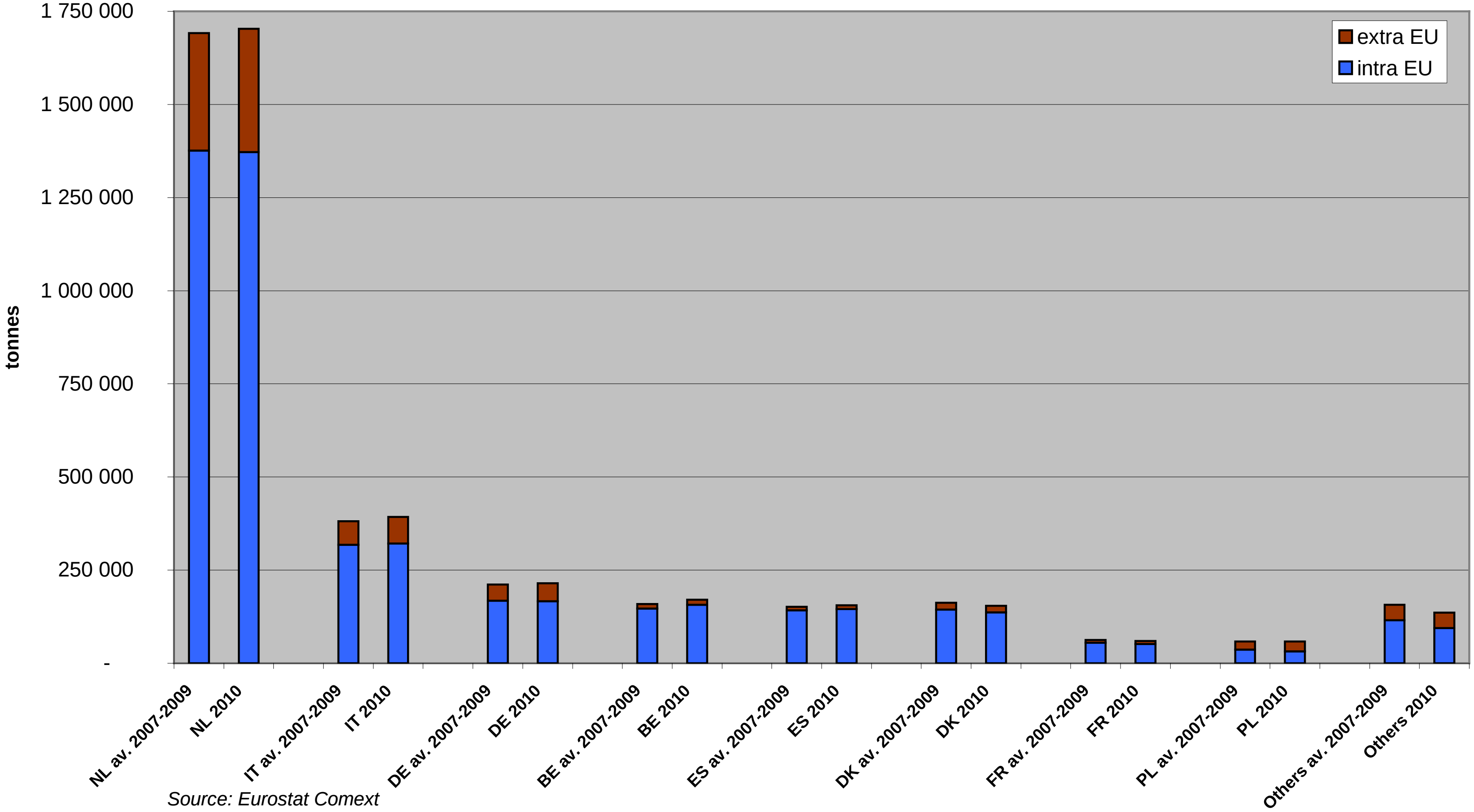
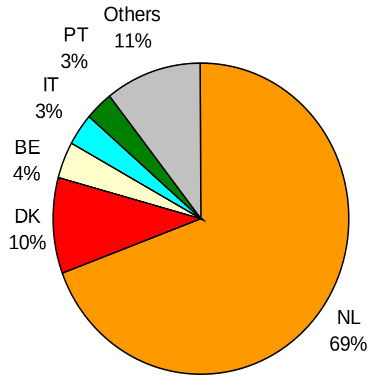
Deliveries of live plants and products of floriculture to intra and extra EU countries

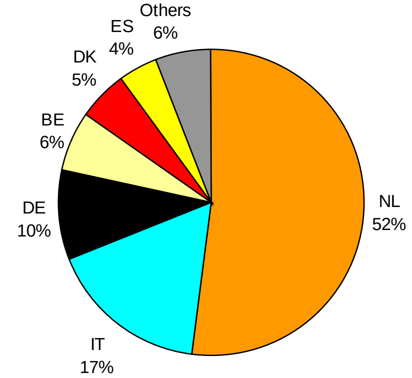


Source: Eurostat Comext

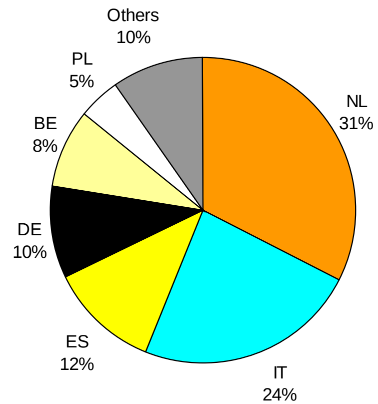
Deliveries to intra and extra EU countries in 2010



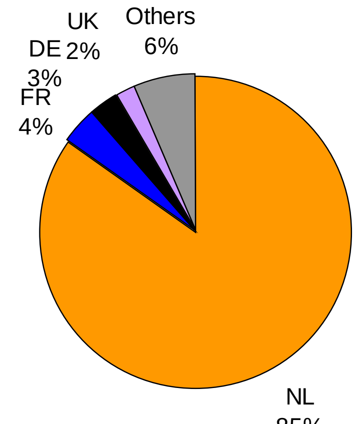
Cut flowers and foliage



Potted plants



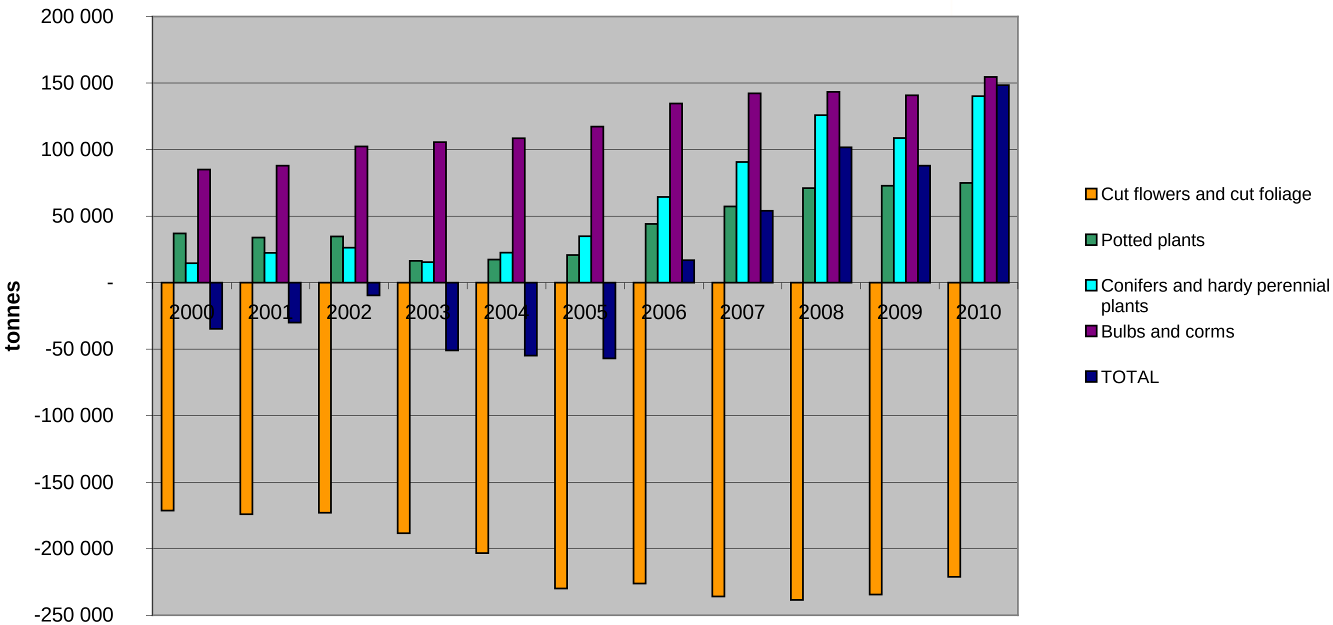
Conifers and hardy perennial pl



Bulbs and corms

Source: Eurostat Comext

Trade balance of live plants and products of floriculture



- *Positive balance since 2006 in tonnes and since 2002 in value*
- *148.000 tonnes / 161 million euros in 2010*
- *EU27 is a net importer of cut flowers and cut foliage and*
- *a net exporter of the other categories*

Source: Eurostat Comext

2. EU POLICIES

EU Policies for the live plants and products of floriculture sector

⇨ *Single Common Organisation of Agricultural Markets in 2007 (Council Regulation No 1234/2007)*

⇨ *Yearly Advisory group meetings (next on 17/10/2011)*

⇨ *Examination procedure,   R182/2011*

⇨ *Trade agreements: duty free access for the main countries of origin.*
On-going negotiations with the countries of destination for tariff reduction or free access

⇨ *Promotion policy: EU support of 50%*

⇨ *Rural developement / regional programmes*

EU Promotion Policy

- *Council Regulation No 3/2008 and Commission Regulation No 501/2008*
- *Flowers and plants are eligible for promotion programmes both on the internal market and third countries*
- *Representative professionnal organisations can present programmes for general campaigns (not linked to origins or private brands)*
- *Duration of the programmes: 1 to 3 years*
- *EU contribution: 50% (no ceiling). The rest is financed by the Member States and/or the national professional organisations.*
- *Currently: 5 programmes related to floriculture out of 91 (2 NL, 1 AT, 1 UK, 1 IT). Global amount: 8,1 million €.*

EU support through the second pillar of the CAP

- *Council Regulation No 1698/2005 and Commission Regulation (EC) No 1974/2006.*
- *Rural development policy for the period 2007 to 2013 is focused on three thematic axes:*
  - *improving the competitiveness of the agricultural and forestry sector;*
  - *improving the environment and the countryside;*
  - *improving the quality of life in rural areas and encouraging diversification of the rural economy.*
- *Every Member State must define its objectives in the rural development national strategy.*
- *Consistently with this strategy, every Member State (or region) must set out a rural development programme, which specifies what funding will be spent on which measures in the period 2007 to 2013.*

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Thank you for your attention

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