Horticultural Services

Garden construction and landscaping

Exterior facilities are built and maintained by garden, landscape and sports fields constructors. These facilities include private gardens, parks, green spaces as well as playgrounds and sports fields. Construction and maintenance include greening of roofs, facades and interiors as well as various recultivation measures and tree rehabilitation.

Client structure in garden construction and landscaping in 2007

- Public sector (20.67%)
- Housing and land settlement societies (13.80%)
- Industrial sector (9.22%)
- General enterprises (4.87%)
- Other (4.44%)
- Private (47.01%)

Cemetery gardening

Cemetery gardeners plan, construct and maintain a variety of gravesites. The responsible local trustees supervise the services to be rendered in connection with permanent gravesite care. There are about 32 million gravesites on ca. 32,000 cemeteries in Germany. Over 80% of these gravesites are decorated with flowers. The majority of cemetery gardeners operate as business establishments.

Open space cultivation of tree nurseries

- Total number of businesses: 3,743
- "Tree nurseries only": 2,259

* Basis: retail prices Source: ZMP

Flowers and decorative plants incl. perennial gardening

Gardeners in Germany mainly produce bedding and balcony plants as well as blooming, potted and green plants. According to ZMP, national production of indoor plants amounted to about 45% while the share of cut flowers was below 20%. According to ZMP estimates, clients spent over €8.9 billion (retail prices) on flowers and decorative plants in 2007. The per capita expenditure of approximately €108 reflects clients’ high esteem for flowers and plants. Below we have listed the bestsellers of flowers and decorative plants.

<table>
<thead>
<tr>
<th>Position</th>
<th>Bedding and balcony plants</th>
<th>Market Vol. of ca. 1.19 bn €</th>
<th>Blooming indoor plants</th>
<th>Market Vol. of ca. 1.27 bn €</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Geraniums</td>
<td>14%</td>
<td>Potted orchid</td>
<td>22%</td>
</tr>
<tr>
<td>2</td>
<td>Panses</td>
<td>7%</td>
<td>Cyclamen</td>
<td>8%</td>
</tr>
<tr>
<td>3</td>
<td>Heather</td>
<td>6%</td>
<td>Christmas flower</td>
<td>8%</td>
</tr>
<tr>
<td>4</td>
<td>Cowslip</td>
<td>6%</td>
<td>Azalea</td>
<td>6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Position</th>
<th>Foliage plants</th>
<th>Market Vol. of ca. 0.53 bn €</th>
<th>Cut flowers</th>
<th>Market Vol. of ca. 3.15 bn €</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ivy</td>
<td>9%</td>
<td>Rose</td>
<td>37%</td>
</tr>
<tr>
<td>2</td>
<td>Dragon tree</td>
<td>6%</td>
<td>Tulip</td>
<td>10%</td>
</tr>
<tr>
<td>3</td>
<td>Weeping fig</td>
<td>6%</td>
<td>Chrysanthemum</td>
<td>7%</td>
</tr>
<tr>
<td>4</td>
<td>Indoor palms</td>
<td>6%</td>
<td>Gerbera</td>
<td>7%</td>
</tr>
</tbody>
</table>

Tree nursery products

About 10% of the horticultural acreage were in use in tree nurseries. Tree nurseries raise a variety of deciduous and coniferous trees, including alley and park trees, blooming trees, fruit trees, ornamental shrubs, soil covers, roses as well as hedges and climbers.
Economically speaking, commercial horticulture is part of agriculture, the so-called original production. Horticultural services are characterised by the production value which is determined annually for horticultural and fruit production and for horticultural services rendered. In 2007 a production value of € 44,901 million was reported for the agricultural sector. With a production value of € 5,404 million, commercial horticulture contributed a share of 12% to the production value generated in agriculture. The production value of horticultural services reached € 5,583 million.

Structure

In 2007, a special crop acreage of almost 220,400 ha has been reported in Germany, which makes up ca. 1.3% of the total acreage in agricultural use (17 million ha). Vegetable cultivation uses most of that acreage, followed by fruit cultivation, tree nurseries, flowers and ornamental plants.

In terms of enterprise structure, horticultural businesses are situated in the small and medium range where most of the jobs are created. In commercial horticulture almost 90% of the enterprises are individual businesses, two thirds of which are run full-time. Compared to purely agricultural enterprises, businesses that include commercial horticulture are labour intensive. Hence a work force of 340,000, representing a quarter of the total work force in agriculture, is employed in such businesses. Including the work force from the horticultural services sector, more than 400,000 people are working in horticulture.

Fruit cultivation

30% of the acreage in horticulture were cultivated by fruit growers. The good apple crop in 2007 made up 75% of the fruit harvest. Provisional per capita consumption amounted to 82.5 kg. The provisional degree of self-sufficiency with regard to vegetables from commercial cultivation was at 40% while provisional per capita consumption amounted to 82.5 kg.

Production in gardening and fruit cultivation

In 2007, outdoor vegetables and commercial cultivation were produced on an area of 107,868 ha. The production of outdoor vegetables amounted to about 3.18 million tonnes. Compared to the previous year, this is an increase of 7%. The area of under glass cultivation rose to 1,464 ha. In 2007/08, the provisional degree of self-sufficiency with regard to vegetables from commercial cultivation was at 40% while provisional per capita consumption amounted to 82.5 kg.

In 2007 enterprises engaging in horticultural production and services offered about 18,000 apprenticeships in gardening. In general, formation and training take 3 years.