



Ornamental Plants

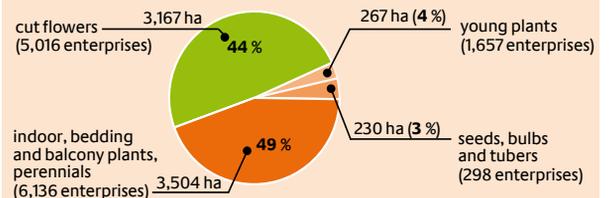
„Made in Germany“



Key facts and figures

In Germany, ca. 8,600 horticultural enterprises produce ornamental plants on about 7,200 ha of land. The area under glass amounts to ca. 2,300 ha. Young plants, seeds, bulbs and tubers are cultivated in about 2,000 German enterprises. In 2008, approximately 6,200 growers produced almost 1,500 million bedding and balcony plants as well as perennials. While 3,400 establishments produced roughly 270 million indoor plants, about 5,000 companies grew cut flowers on 3,200 ha. German ornamental plant production reached a total production value of about 1.6 billion Euros.

2008 Ornamental plant production* in Germany



* Figures indicate base surface.
- Multiple entries were possible

Source: Federal Office of Statistics, BLE

Most ornamental plant growers are located in the federal state of North Rhine Westphalia where 40% of Germany's base surfaces are located. The lower Rhine region is the most important growing region for ornamental plants in Germany, followed by Bavaria, Lower Saxony, Baden-Wuerttemberg (the Upper Rhine region and the area around Stuttgart). Hamburg also looks back on a long tradition of ornamental plant production while the regions of Erfurt, Dresden and Meißen are prominent growing regions in the eastern part of Germany.

German ornamental and young plant nurseries employ highly qualified staff. Generally, it takes three years of education and training in approved enterprises to be a horticulturist. This skilled occupation which combines education and vocational training is the most popular agricultural job in Germany. In 2008 more than 3,900 young people were trained as gardeners in ornamental plant and perennials production.

Masters, technicians and engineers direct production within their companies, they engage in plant breeding or in developing new products. Federal state laboratories facilitate the quick transfer of knowledge. An effective network of universities and research institutions provides education for young scientists and does research towards innovations in horticulture.



The Ornamental Plant Market

Germany, along with the USA and Japan, is among the three largest ornamental plant markets world-wide and, within Europe, holds the top market position by far. In 2009, provisional sales, at retail prices, achieved by the entire national market reached about 8.6 billion Euros. The remarkably high market

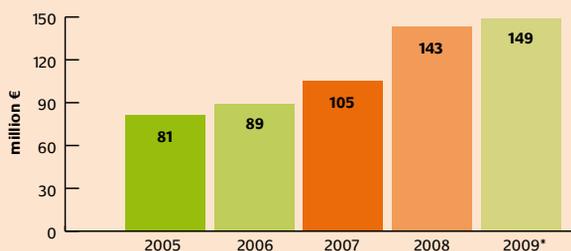


relevance of bedding and balcony plants is almost unique in Europe. For ornamental plants (including woods) the value-related degree of self-sufficiency (percentage of national production in relation to total consumption) is at almost 50%, although figures may vary significantly, depending on the various segments concerned. The lowest degree of self-sufficiency is to be noted in the cut flower segment (ca. 18%) while it is highest (76-78%) for bedding and balcony plants. A free market and heavy competition have always challenged ornamental plant producers to offer high quality products that are strictly custom-made.

According to provisional figures, the German volume of sales from exports of plants and floricultural products in 2009 amounts to 530 million Euros, with Germany's neighbouring countries being the most important export destinations. About a quarter of total exports go to the Netherlands, while Switzerland and Austria import ca. 14% each, followed by France with 9%.

The export value of ornamental plants alone amounted to over 300 million Euros. Potted plants, i. a. azalea, were exported at a value of 150 million Euros, making for almost half of the exports of ornamental plants and almost 27% of total exports of floricultural products. 91 million Euros worth of bedding and balcony plants, including outdoor perennials, were sold abroad, making for 17% of total sales in the floral trade. Exports of young plants amounted to 65 million Euros, making up 12% of total export sales in the floral trade.

2005 – 2009 Exports of potted plants from Germany



*provisional figure

Source: Federal Office of Statistics, BMELV, BLE

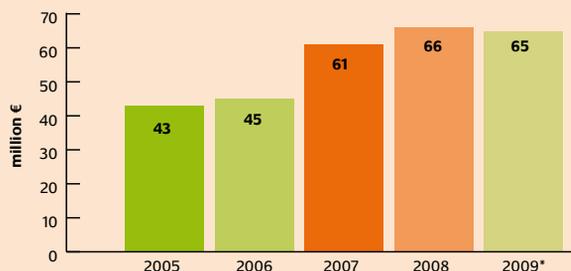
From 2005 to 2009 exports of potted plants rose by almost 70 million Euros. The Netherlands rank first as export destination for potted plants from Germany, followed by Austria, Switzerland, France and Denmark. In recent years, exports to countries in eastern and central Europe have also developed dynamically.

In addition to being of excellent quality, German ornamental plant products are characterised by their ready availability and high supply security.

German Young Plants and Plant Breeding for the International Market

German plant breeders and young plant enterprises play an important role on markets world-wide. "Made in Germany" has become a synonym for quality and innovation where new plant varieties and young plant products are concerned. The high efficiency of

2005 - 2009 Exports of young plants and cuttings from Germany



*provisional

Source: Federal Office of Statistics, BMELV, BLE

ornamental plant breeders and the progress in the field of plant breeding it entails are reflected, i.a., in the wide range of seed assortments available from breeders and in the number of approved applications for European variety protection. Currently, German breeders offer about 800 pelargonium and 120 poinsettia varieties. Ornamental plant growers operate on the world market. Even small enterprises market their products internationally, focusing on Europe and North America. Depending on the plant species, German growers hold the biggest share in these markets. For some species, such as geranium, begonia bulbs and cut roses, individual ornamental

plant breeders are even world market leaders. An estimated 60% of cut rose varieties world-wide result from breeding efforts by those companies. According to 2009 estimates, the ten largest German plant breeders and young plant growers produced about 3 billion cuttings, mostly grown in countries which, due to their favourable climate and geographic location, guarantee particularly high plant quality. While breeding and economic activities are carried out at company headquarters, mostly located in Germany, production locations can be found across the world in Kenya, Ethiopia, Uganda, Egypt and Israel, or in Costa Rica and El Salvador in Central America where the companies concerned do not only contribute to economic development but also invest significantly in both environmental and social standards for employees.

„Made in Germany“, the term that signifies quality, is based, first of all, on the very strict management of plant quality and health, especially in young plant and seeds production. Breeders focus on a very high germination capacity and power as well as on health and varietal purity.

Cuttings are produced under strict health management pursuant to provisions of the European Plant Protection Organisation (EPPO) and are being monitored in collaboration with the national health services.



Related Contacts in Germany

- Ornamental Plant Federation
[Bundesverband Zierpflanzen (BVZ)]
www.bundesverband-zierpflanzen.de
- German Perennials Association
[Bund deutscher Stauden (BdS)]
www.stauden.de
- Azerca
www.azerca.de
- Young Plants Special Group
[Fachgruppe Jungpflanzen (FG)]
www.youngplants.de

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