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Live plants and products of floriculture sector in the EU

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Unit C.2. Wine, spirits, horticultural products, specialised crops

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Structure of the presentation

1. *Production*

2. *Land area*

3. *Trade*

This statistical document has been prepared by Unit C.2 of DG AGRI, in order to stimulate discussion at the Civil Dialogue Group. It is a mere working document. The European Commission does not accept any responsibility in respect of the exactness of given data.



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1. PRODUCTION

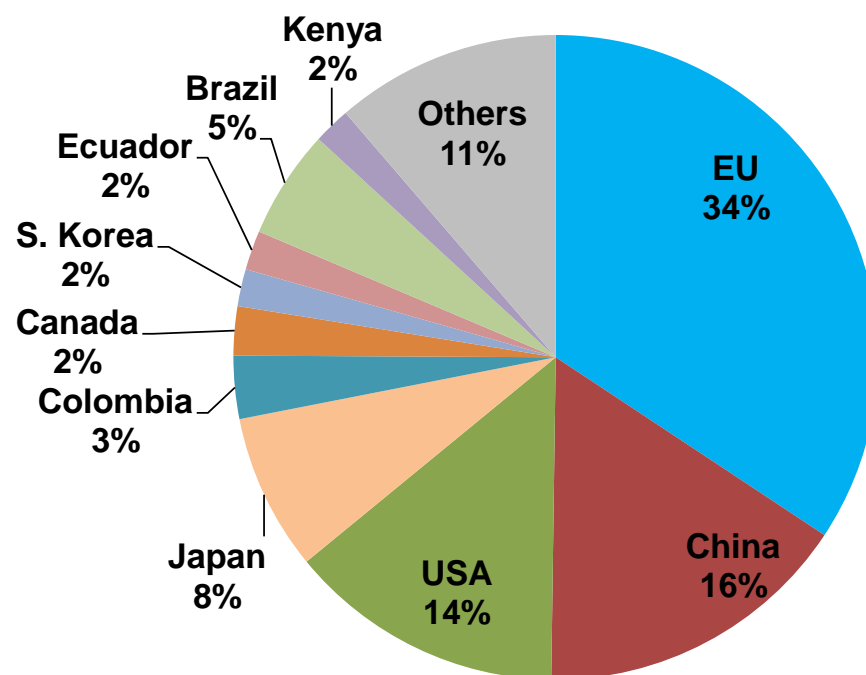


Production in the World



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1.4 Production: share of value by Country/Area in 2014*



* or most recent available year

Source: AIPH (International Association of Horticultural Producers)/Union Fleurs (International Floricultural Trade Association)

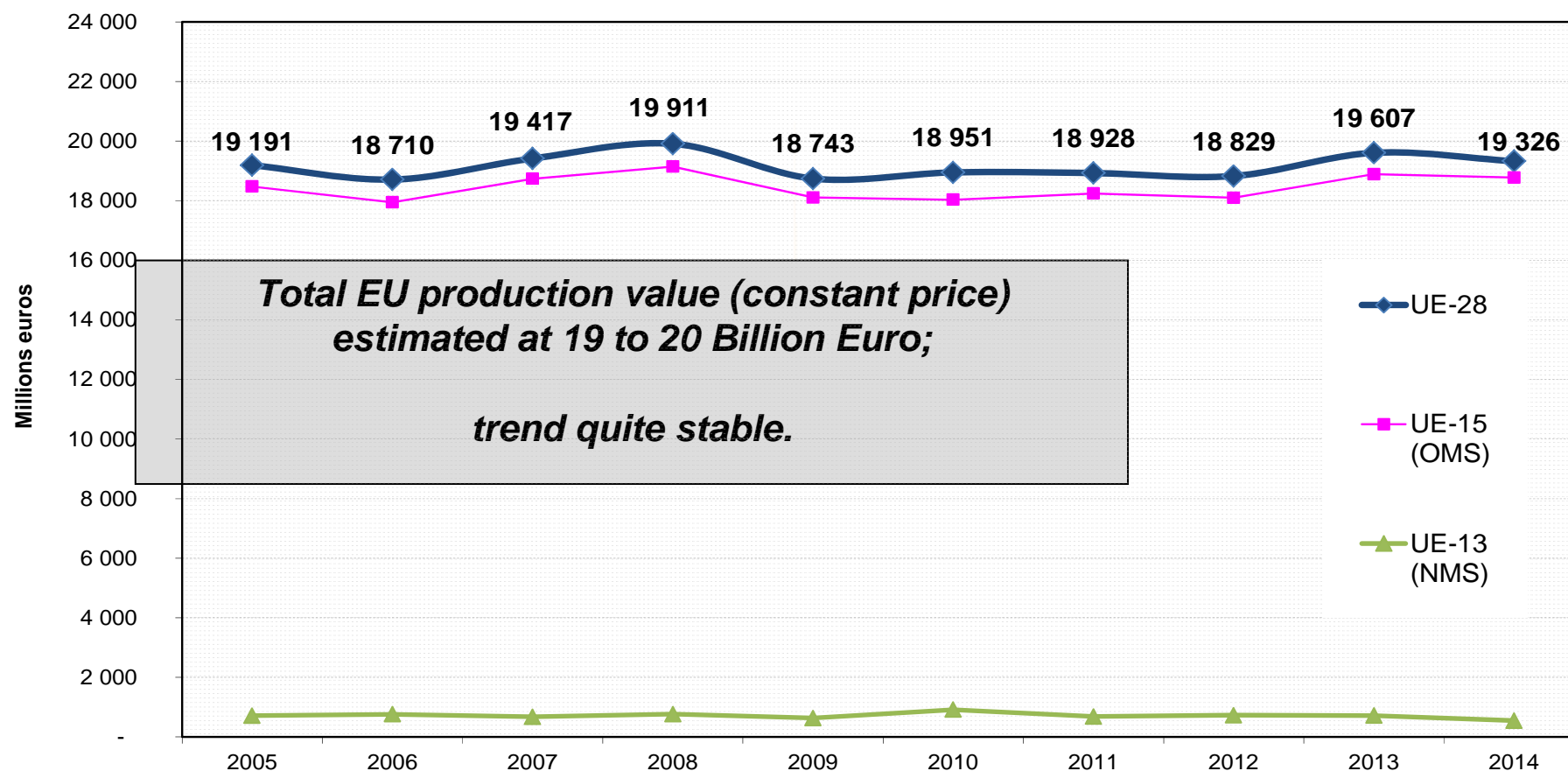


Value of production in the EU (evolution)



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Graph 1.1.b Production of flowers and plants in the EU
(based on production values at producer prices, constant prices 2005=100)



Source: EUROSTAT - all data "Eurostat estimates"

Live plants and products of floriculture

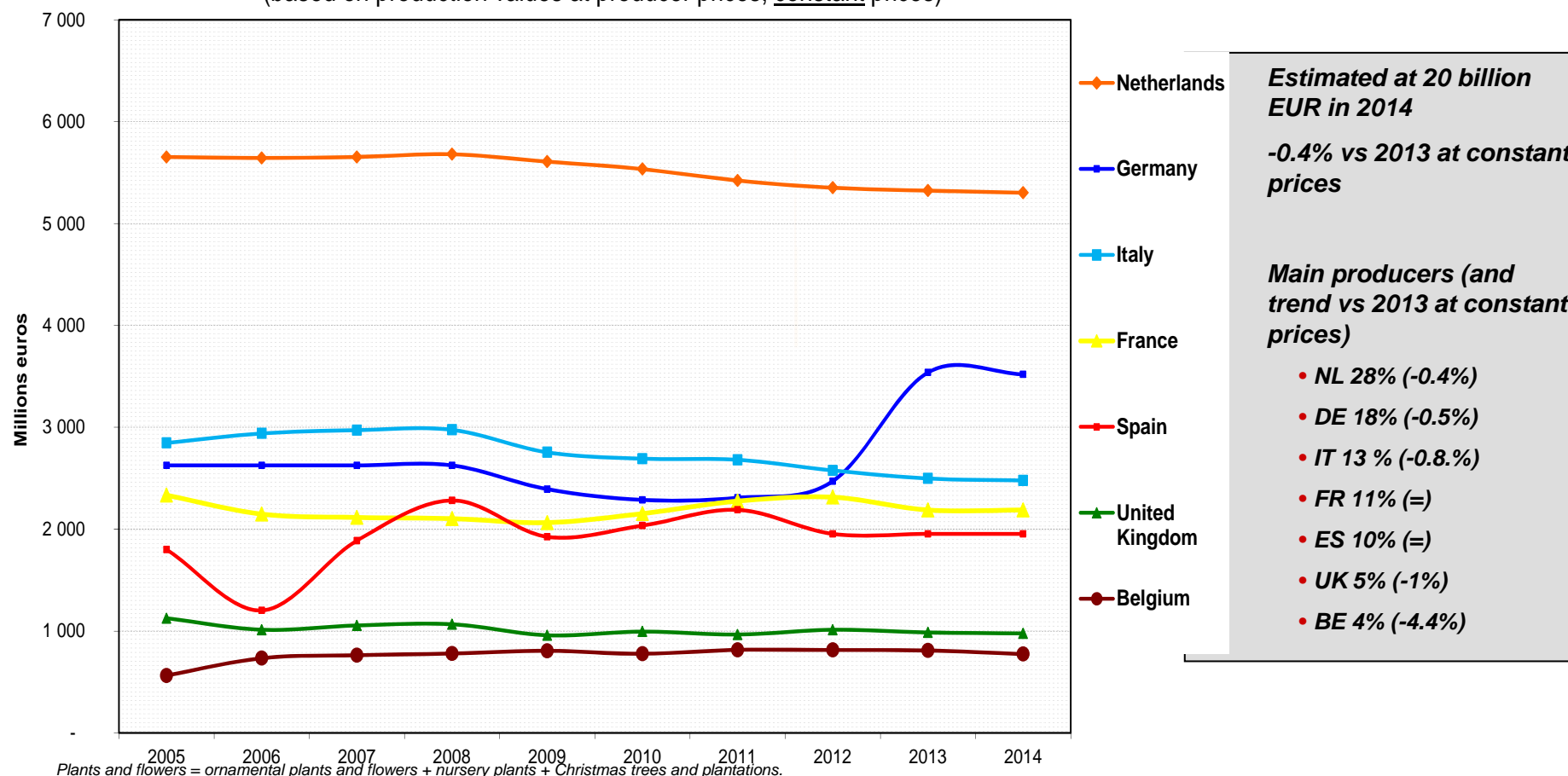


Value of the production of plants and flowers



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Graph 1.2b Production of flowers and plants in the EU
(based on production values at producer prices, constant prices)



Source: EUROSTAT

2014: provisional / estimated data
Source: Eurostat, Economic Accounts for Agriculture



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2. LAND AREA

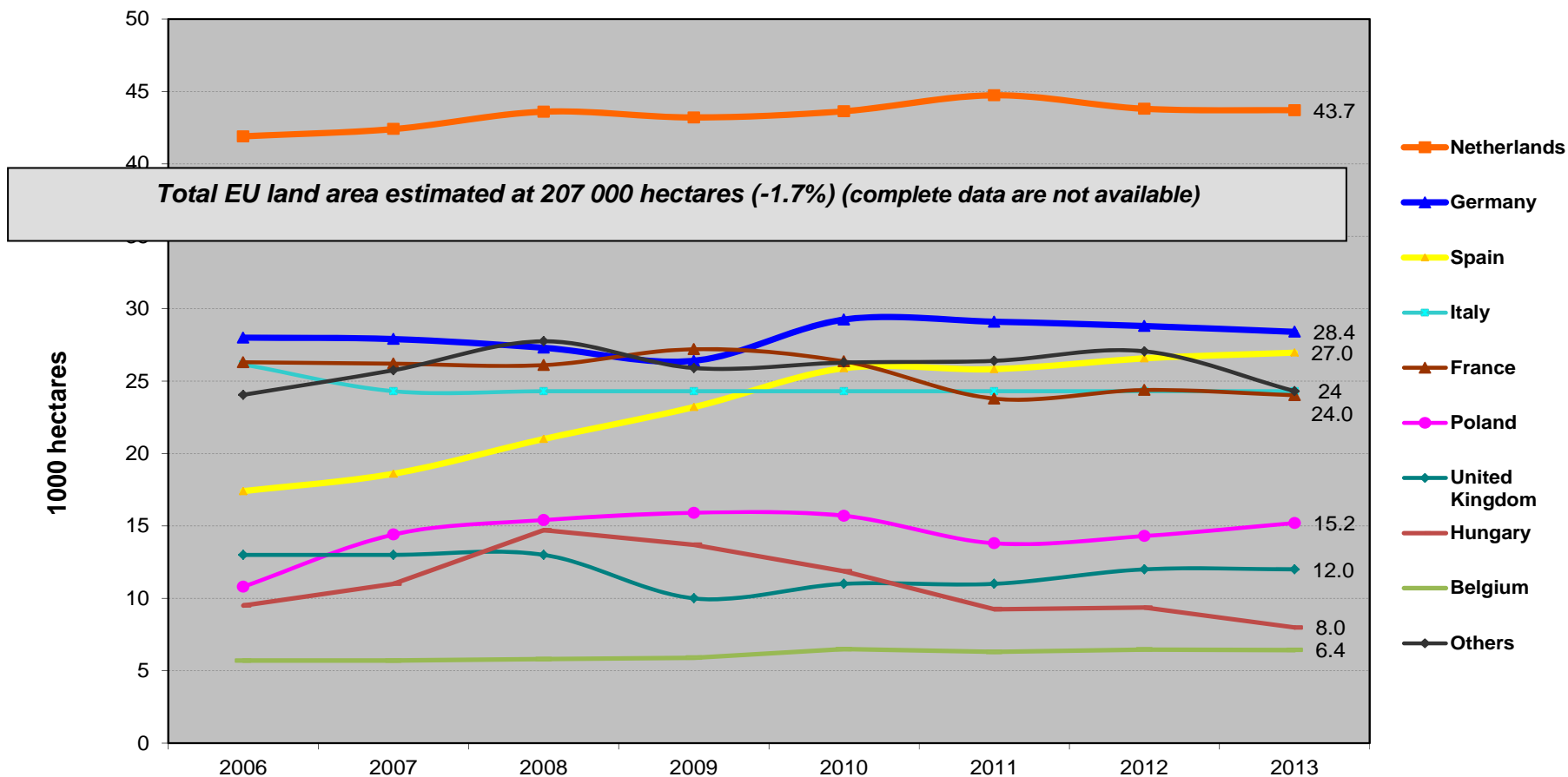


Land area in the EU



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Graph 2.2 Land area of flowers, ornamental plants and nursery plants in the EU



NB: contains estimated data

Source: EUROSTAT, AGRI C2 Estimates

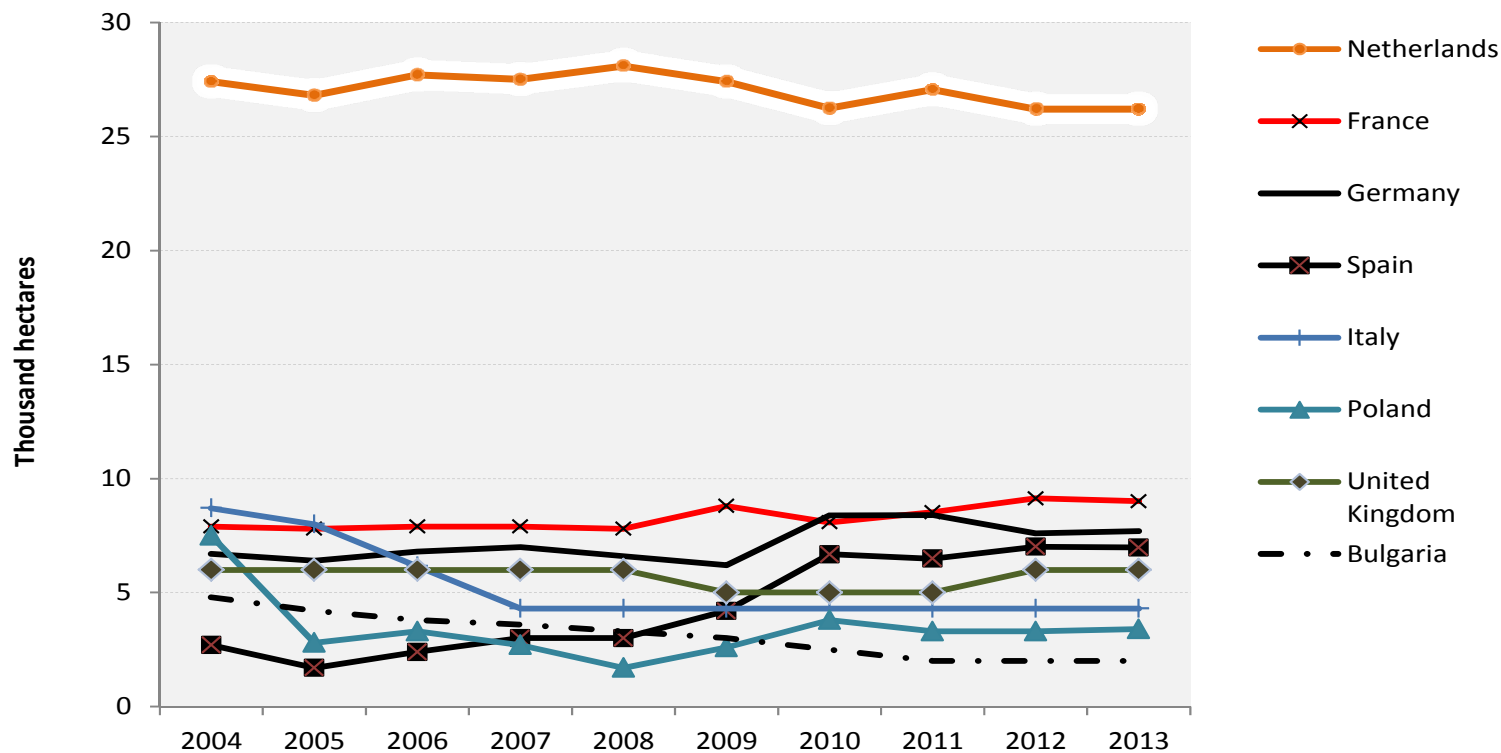


Land area



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Land use - Flowers and ornamental plants (excluding nurseries)



Flowers and ornamental plants

⇒ NL about 34% of total (=)

⇒ FR about 12% of total (-1.3%)

⇒ DE about 10% of total (+1.3%)

⇒ ES (9%), UK (8%), BE (7%), IT (6%), PL (4%), BG (4%)

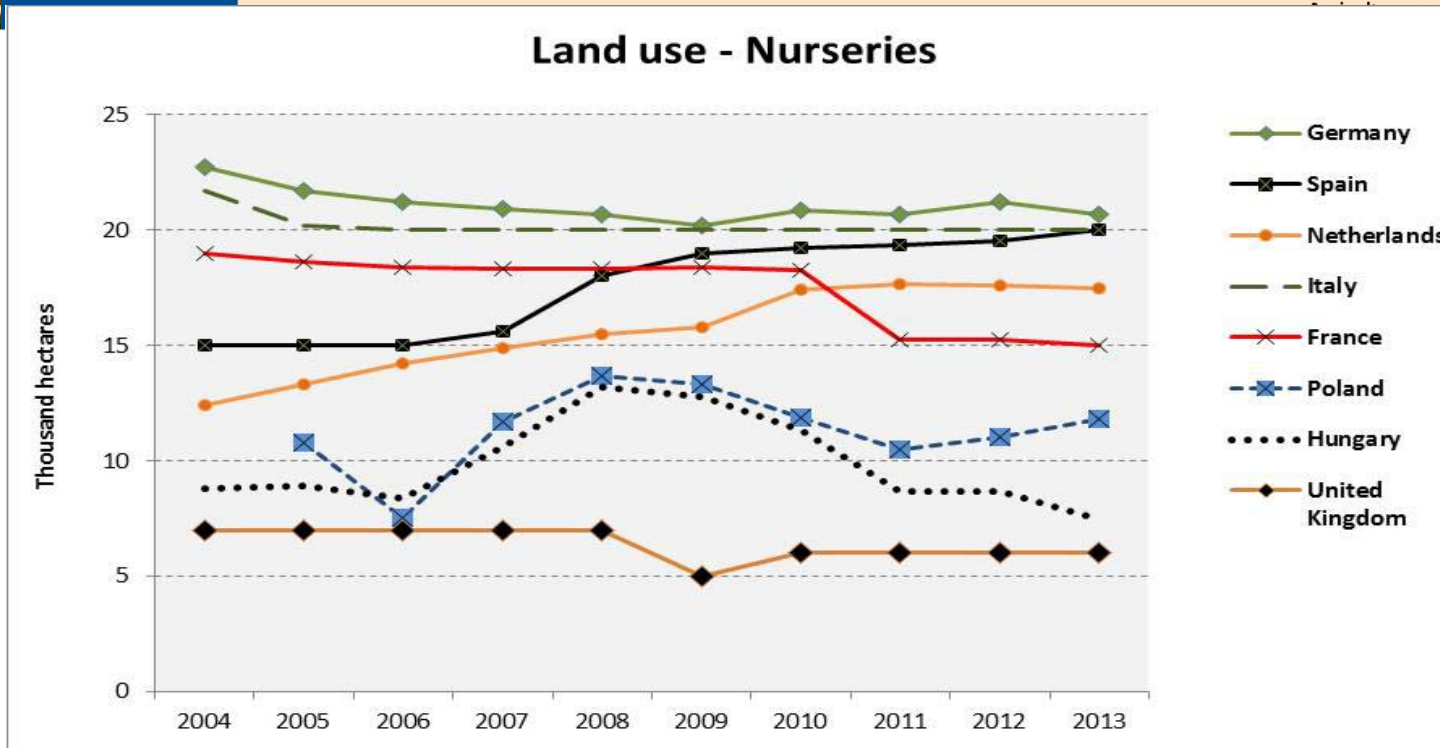
Source: EUROSTAT (apro_cpp, L2810 and L3001)



Land area



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Hard nursery stocks

- ⇒ New decrease in DE and ES
- ⇒ Stable in NL, FR and UK
- ⇒ Increase in ES and PL

- ⇒ Decreasing in HU
- ⇒ (N.B. No data available for Italy since 2006)

Source: EUROSTAT (apro_cpp, L2810 and L3001)



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3. TRADE



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3. TRADE

Methodology

For the purpose of this analysis on trade, four main categories of live plants and products of floriculture have been considered:

Cut flowers and cut foliage (roses, carnations, orchids, gladioli, chrysanthemum, foliage cut and other products
- CN codes: HS 0603 + HS 0604)

Potted plants, bedding and balcony plants and nursery plants (Rhododendrons, azaleas, chrysanthemum, begonia, geranium, impatiens, other potted plants, other bedding and balcony plants – CN codes: HS 0602 excluding 06022090, , 06029041, 06029049)

Conifers and hardy perennial plants (conifers, other non-forest nursery products – CN codes 06022090, 06029041, 06029049)

Bulbs and corms (tulips, hyacinths, orchids, narcissis and others – CN code: HS 0601).

NB. Not considered: vegetable or strawberry plants, Mushroom spawn - CN codes 06029010, 06029020, 06029030
(These products represent in 2014 an import value of about 20 mio € and an export value of about 90 Mio € (2014).

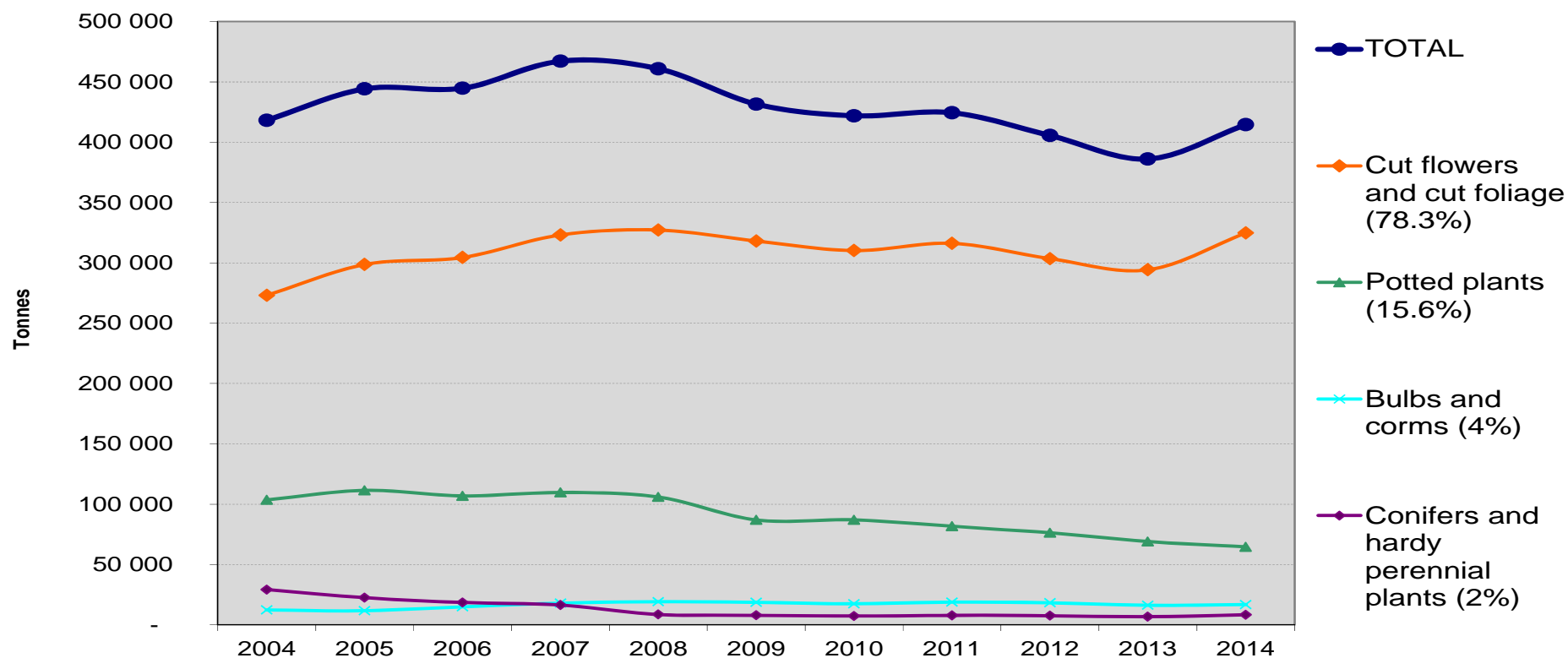


Imports into EU of live plants and products of floriculture (quantities)



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Graph. 4.2 Imports of live plants and products of floriculture
(in tonnes, % = share in 2014)



Total volume: 414,580 tonnes in 2014

➡ + 7.4% versus 2013 (decreasing trend, excepted cut flowers in 2014)

Source: Eurostat Comext

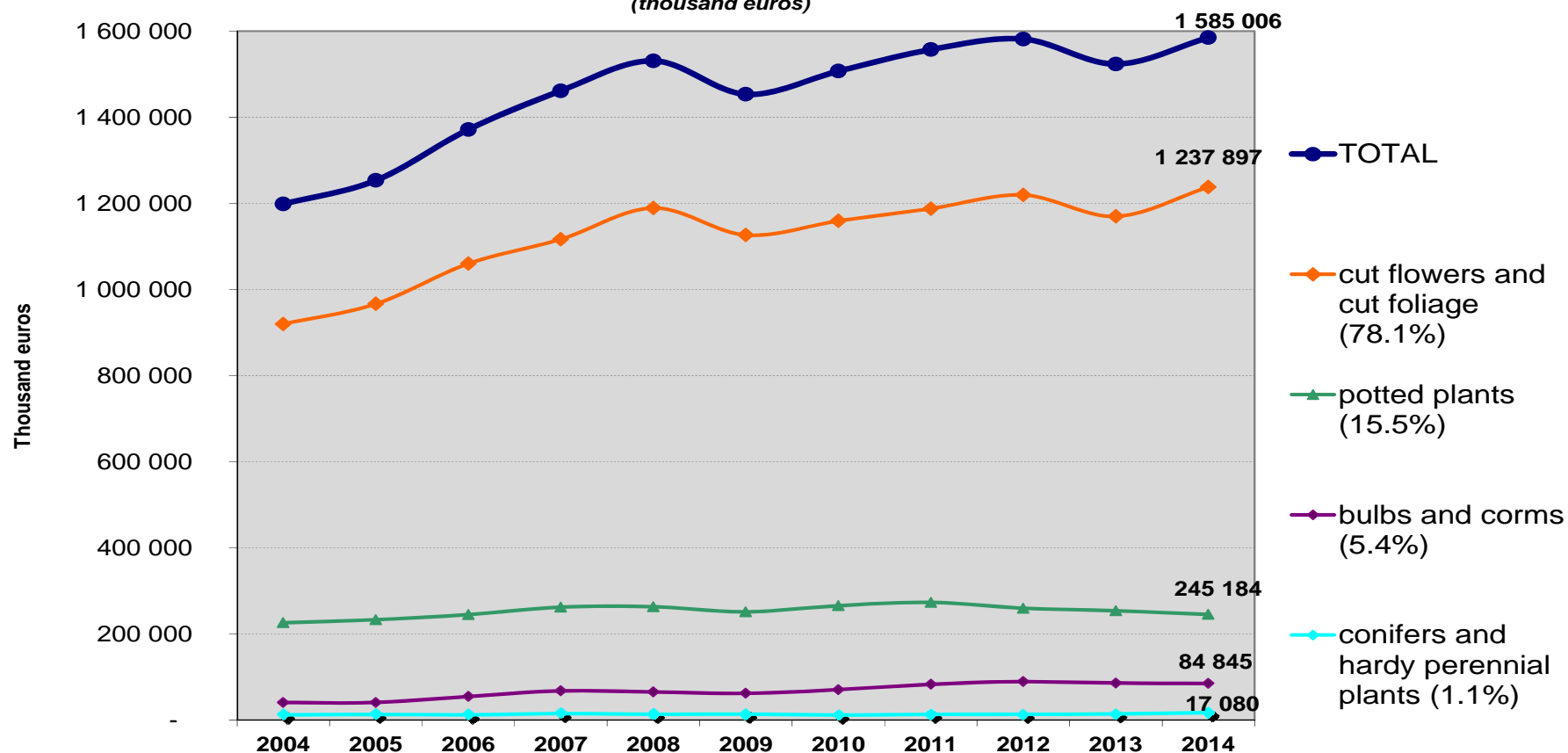


Imports into EU of live plants and products of floriculture (value)



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Graph. 4.15 Imports of live plants and products of floriculture
(thousand euros)



Import Value: 1 585 Mio € in 2014 of which 1 238 Mio € cut flowers/foilage

➡ + 4% versus 2013 (mainly due to cut flowers/foilage imports: +5.8%)

Eurostat Comext

Live plants and products of floriculture

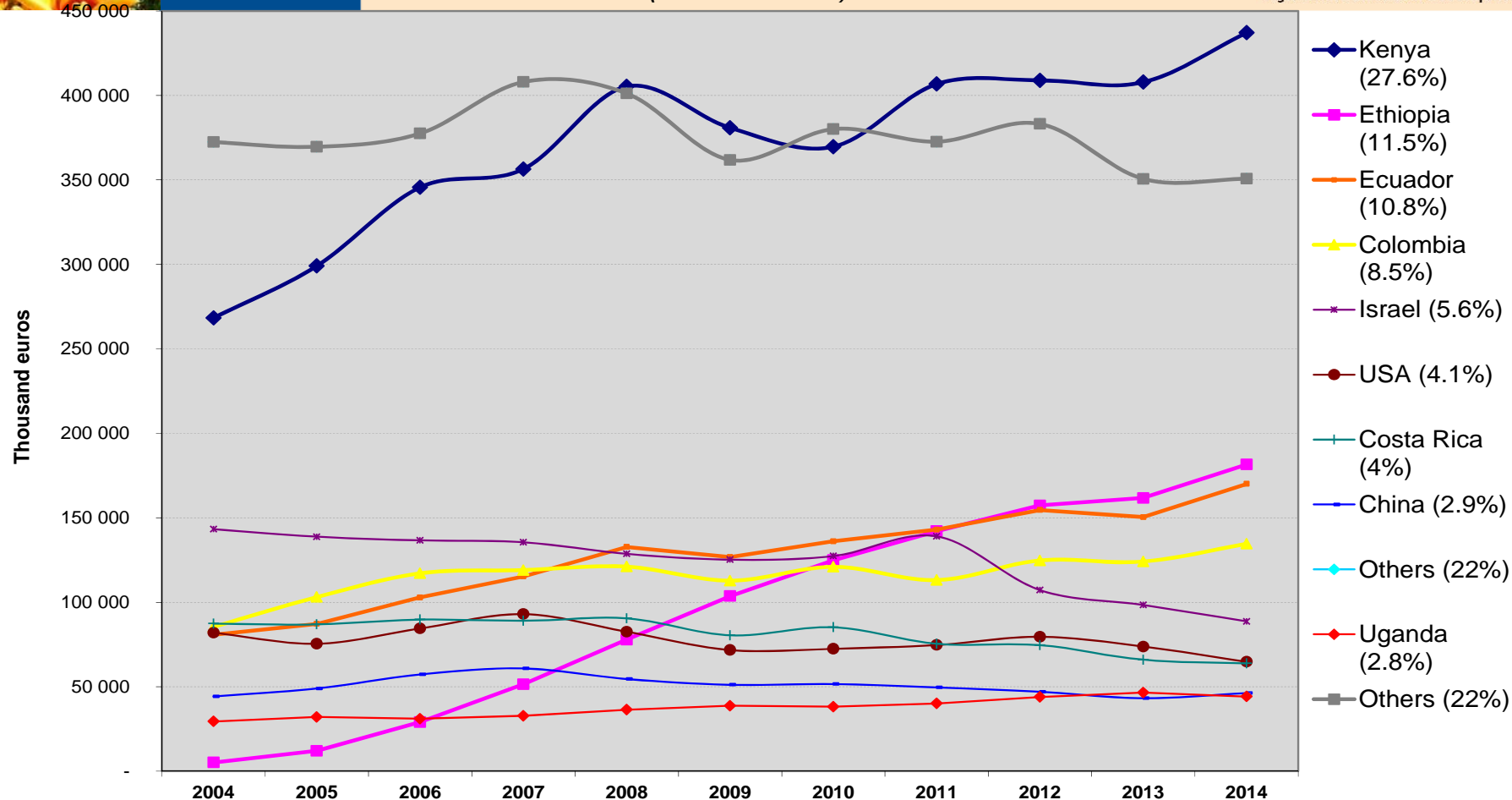


Imports by country of origin

Graph 4.16 Total import by country of origin
(in thousand euros)



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- ⇒ Long term growth of imports from Kenya, Ecuador and Ethiopia (mainly cut flowers)
- ⇒ Declining : Israel, USA, Costa Rica, ...

Source: Eurostat Comext

Live plants and products of floriculture

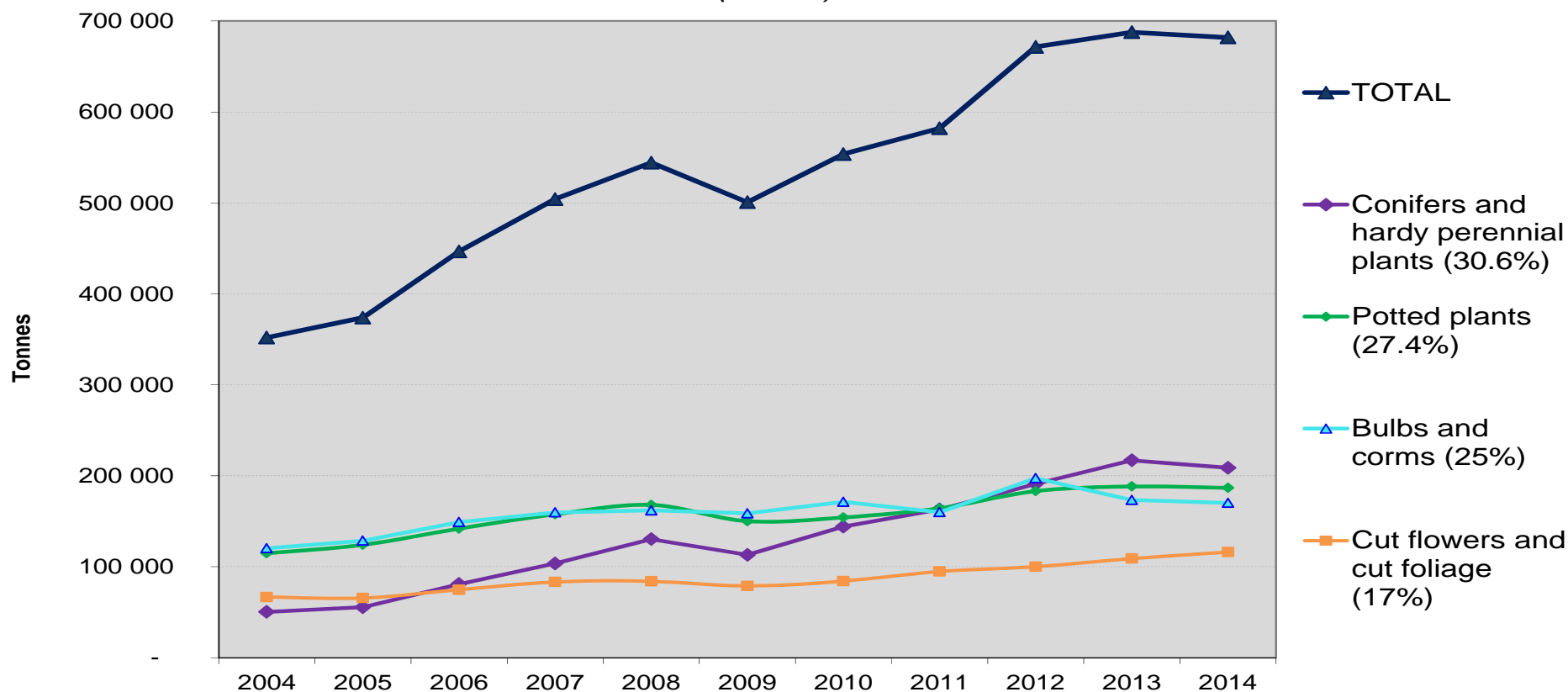


EU Exports of live plants and products of floriculture (quantities)



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Graph. 4.8 Exports of live plants and products of floriculture
(in tonnes)



Volume: 682,000 tonnes (- 0.8%)

⇒ exports with increasing trend since 2009 for cut flowers/foilage (+ 6.5%)

⇒ Decreasing by 4% for conifers, by 1% for potted plants and by 2% for bulbs (versus 2013)

Source: Eurostat Comext

Live plants and products of floriculture

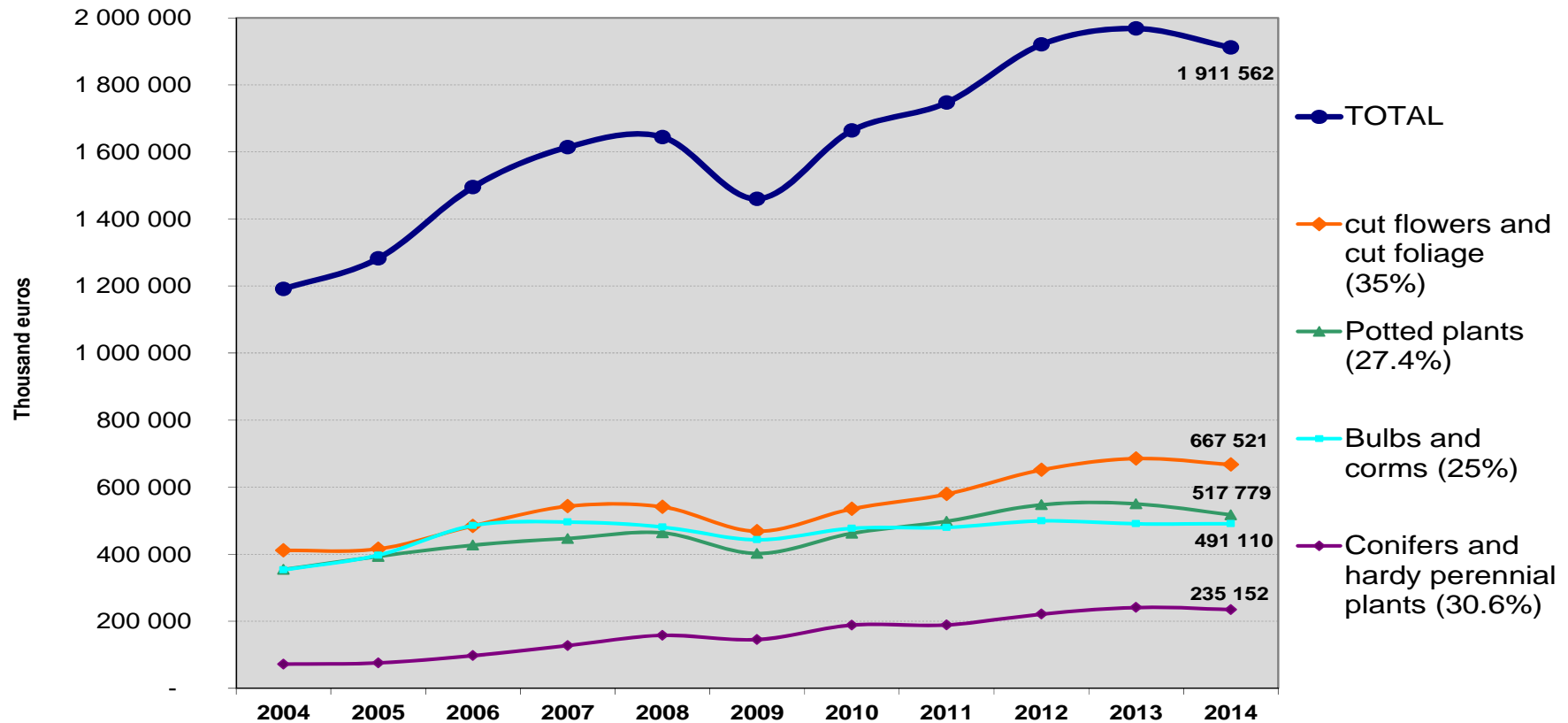


EU Exports of live plants and products of floriculture (value)

Graph. 4.17 Exports of live plants and products of floriculture
(thousand euros)



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Export value: 1 911 Mio € (- 2.9%).

⇒ exports of all categories with decreasing trend in 2014 (stability for bulbs and corms)

⇒ decreasing by 2.6% for cut flowers; by 2.5% for conifers, by 6% for potted plants versus 2013

Source: Eurostat Comext

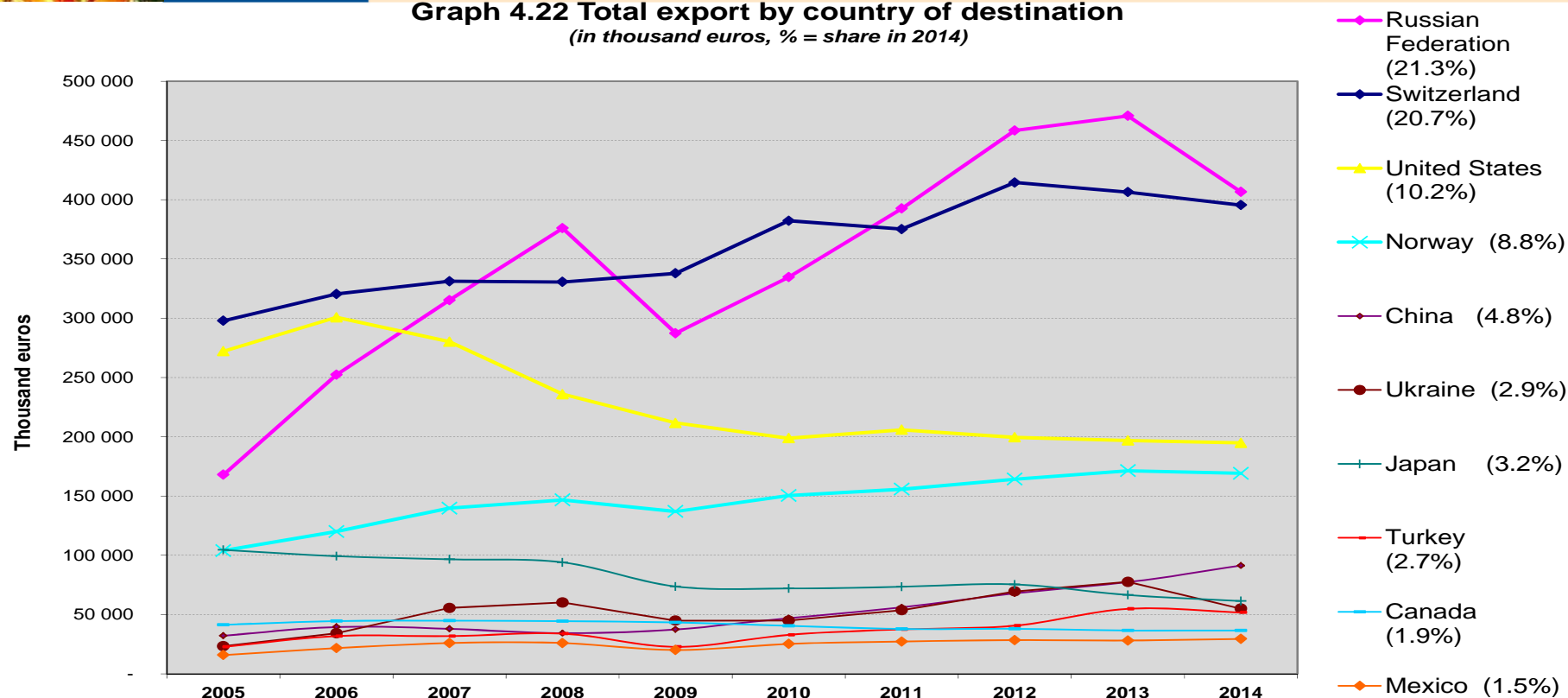


EU Exports by country of destination



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Graph 4.22 Total export by country of destination
(in thousand euros, % = share in 2014)



- ⇒ Main partners: Russia : 21% (-13.6% //2013) and CH : 20% (-2.7%)
- ⇒ Total exports decreased in 2014 but not all the destinations : +8% China; +5% Mexico
- ⇒ Exports of cut flowers decreased by 10% to Russia, by 12% to Ukraine.

Source: Eurostat Comext

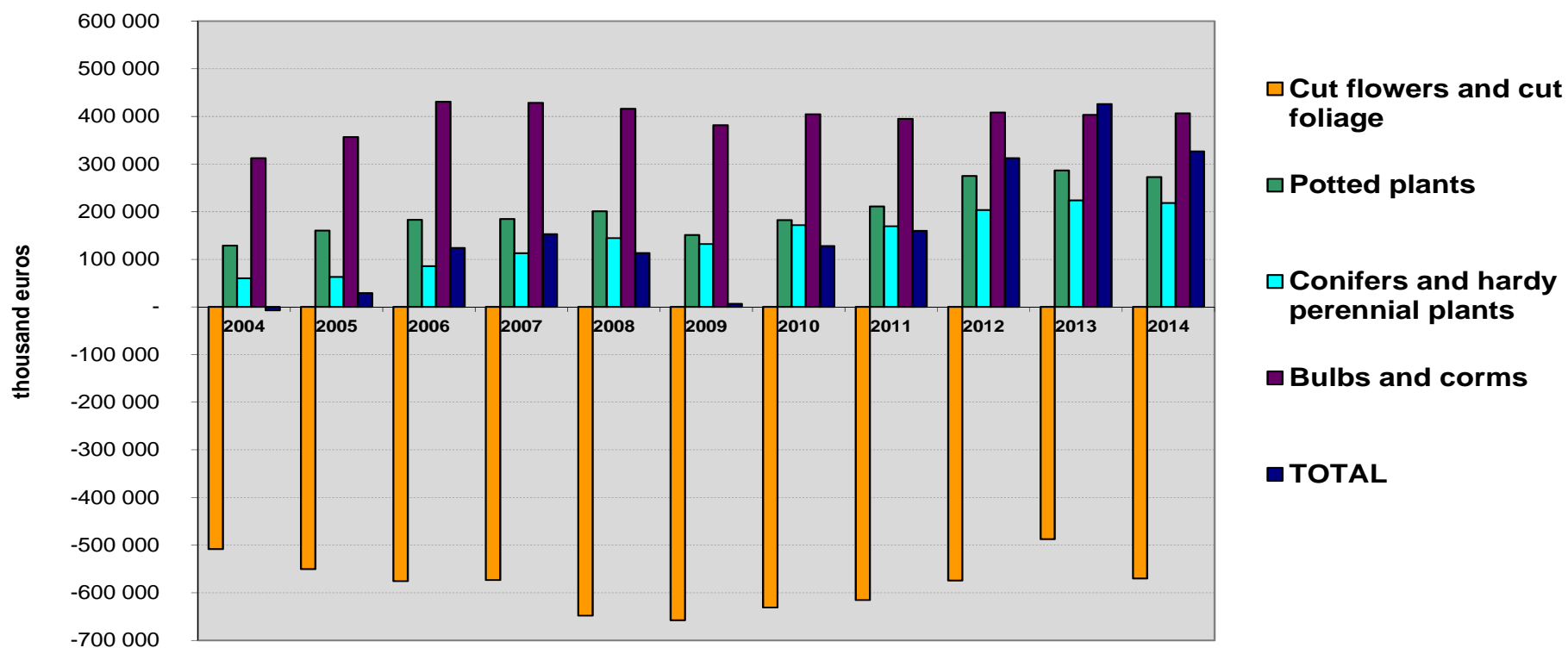


EU TRADE BALANCE



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Graph 4.14 Trade balance of live plants and products of floriculture
(in thousand euros)



- ⇒ Positive trade balance since 2002. **In 2014 +326 Mio €**; in 2013 +426 mio € (- 23%)
- ⇒ Trade balance is constantly negative on cut flowers/foilage and increasing in 2014.

Source: Eurostat Comext

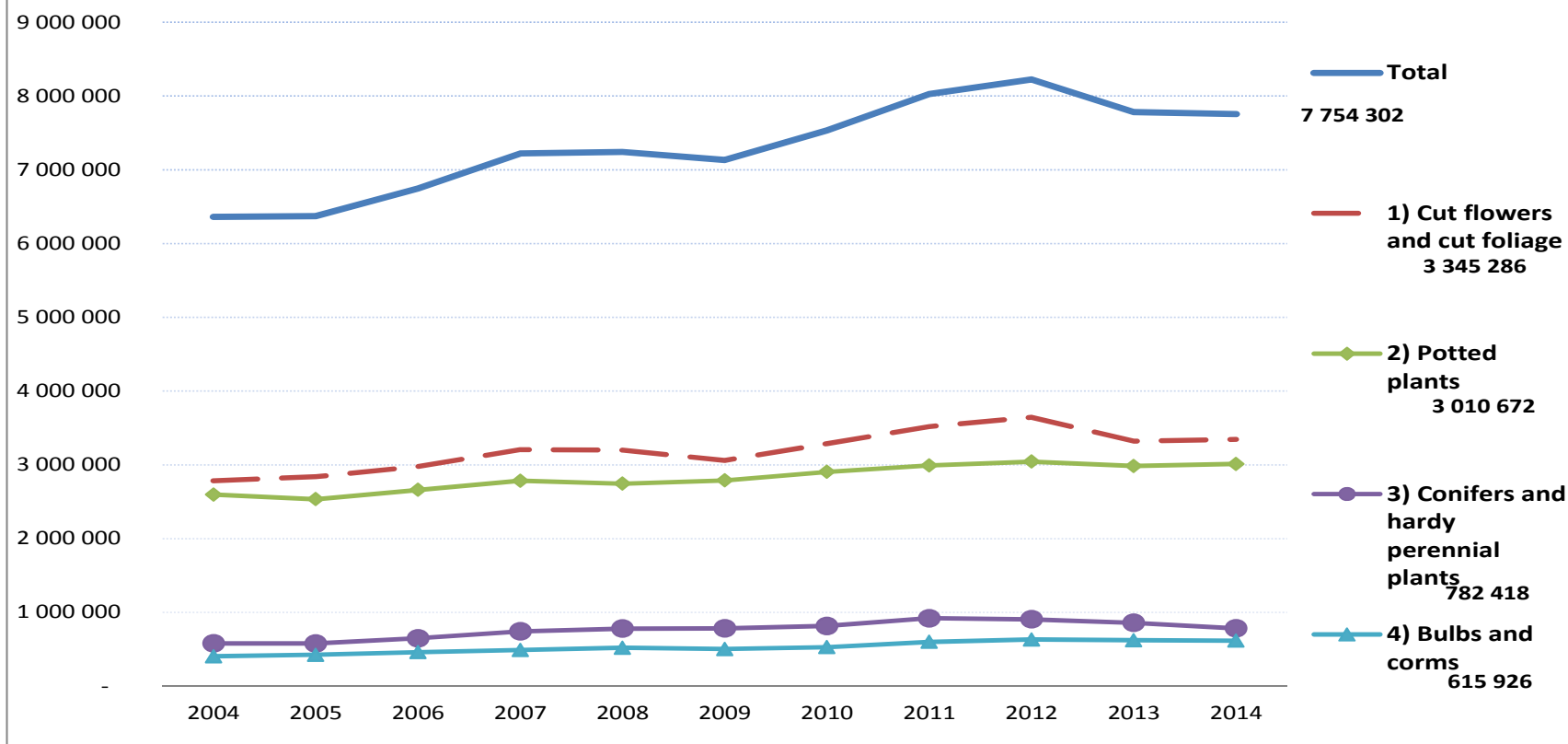


Trade between the MS (Intra EU28) Evolution 2004- 2014



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GRAPH 5.1 Export IntraEU28 value (x 1000€)



⇒ **Total value in 2014: 7 754 Mio € ; cut flowers 3 345 Mio €; potted plants 3 011 Mio €**

⇒ **Stability for all but decreasing trend for conifers perenial plants (-8%)**

Source: Eurostat Comext

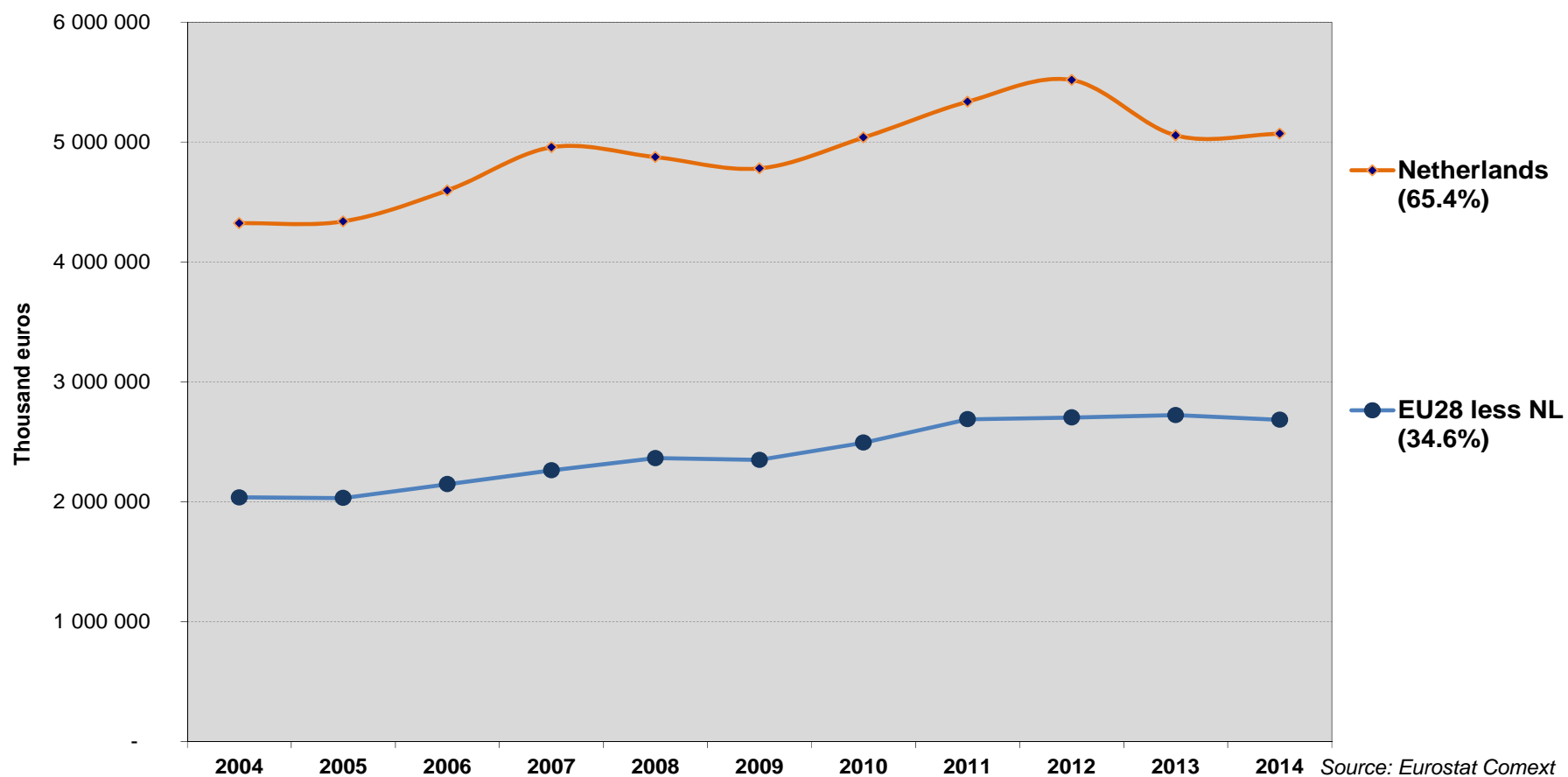


Trade between the MS (Intra EU28) Evolution 2004- 2014 Main exporters



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GRAPH 5.1.1 Export IntraEU28 by NL and other MS together
value in thousand euros



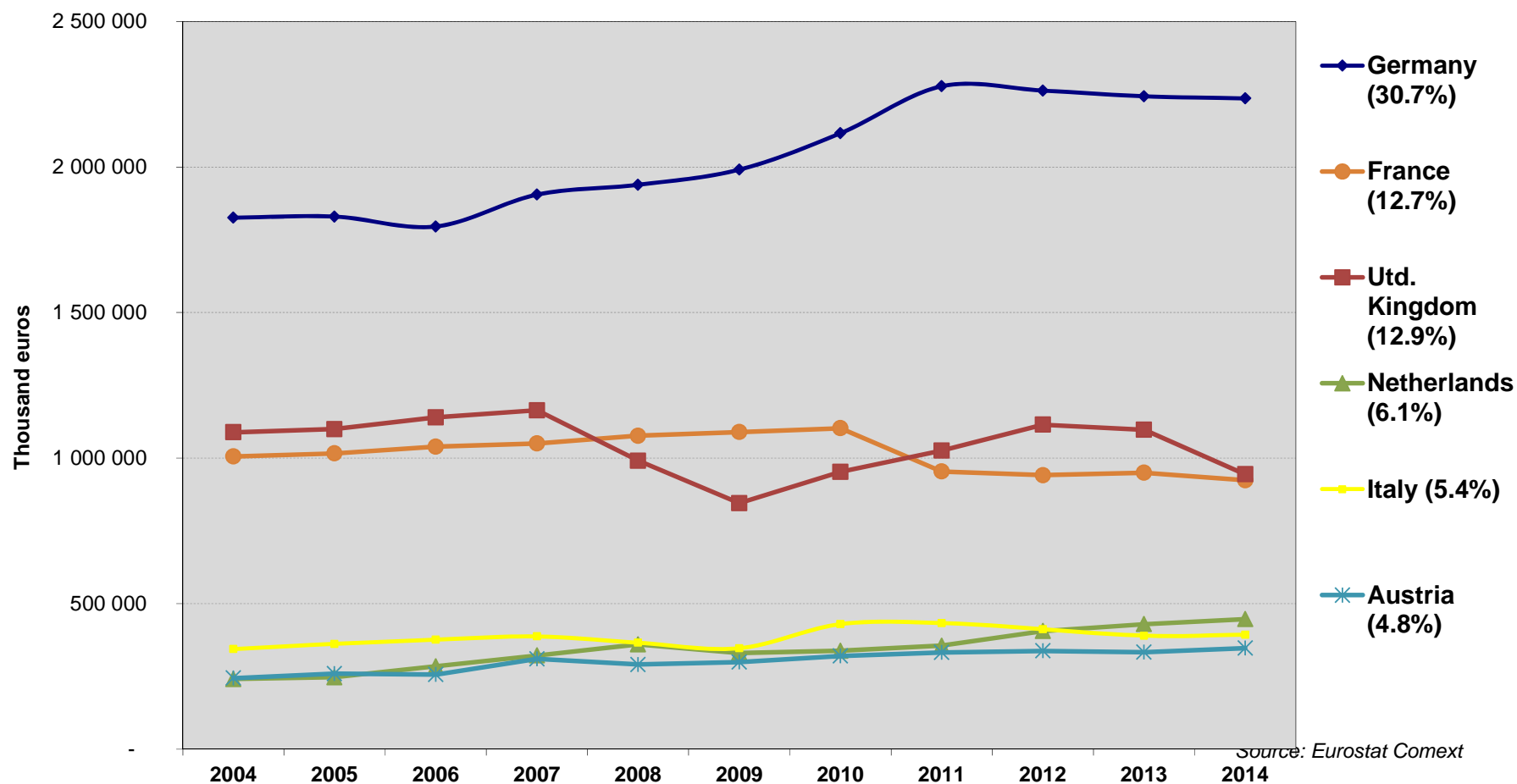


Trade between the MS (Intra EU28) Evolution 2004- 2014 Main exporters



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GRAPH 5.2 Import IntraEU28 from Member States (main)
value in thousand euros



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TRADE of CUT FLOWERS (trends)

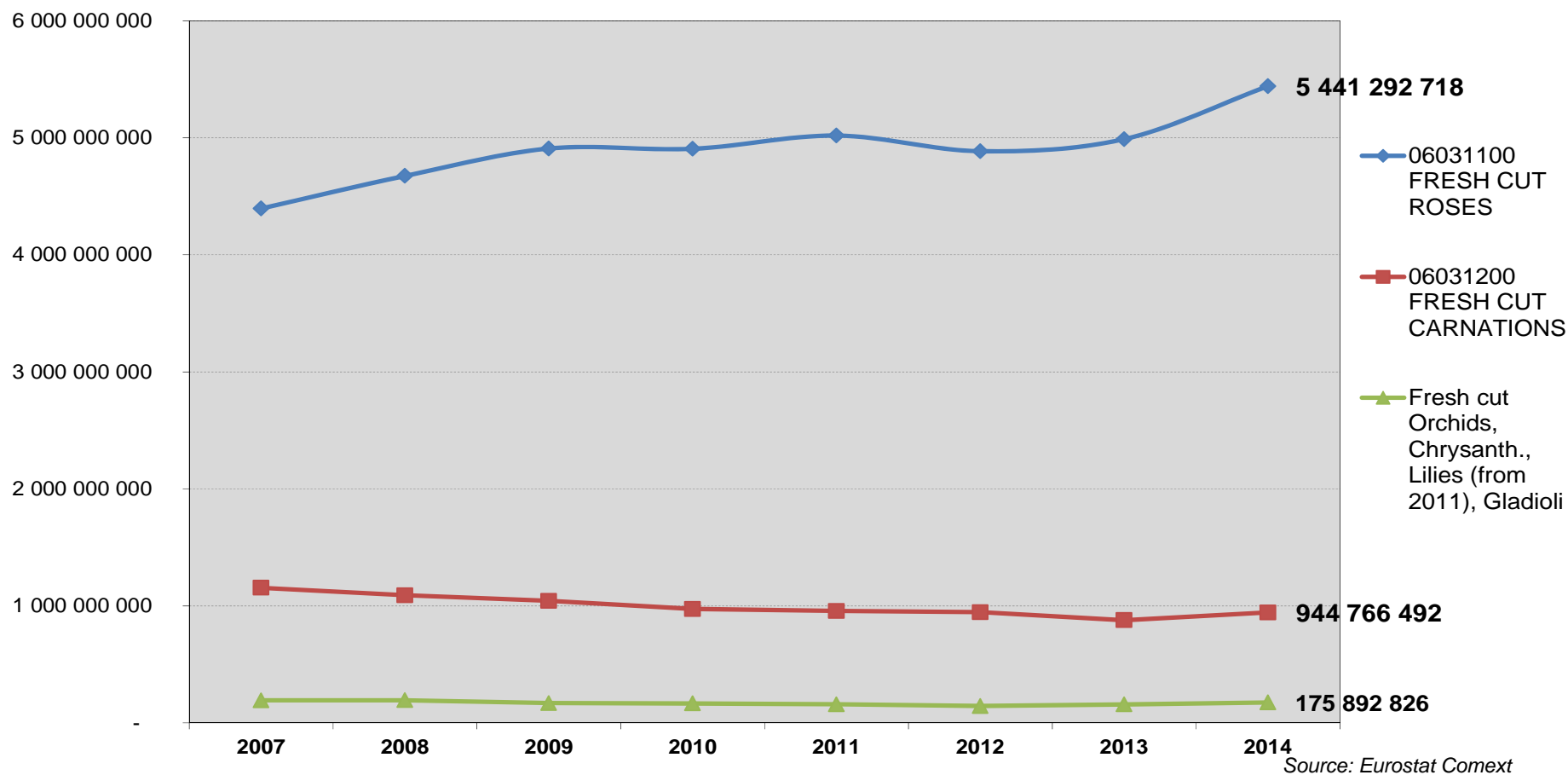


EU Import of some cut flowers (CN-code 0603) Evolution 2004- 2014



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Graph 6.2. Import of cut flowers only from third countries (number of pieces)



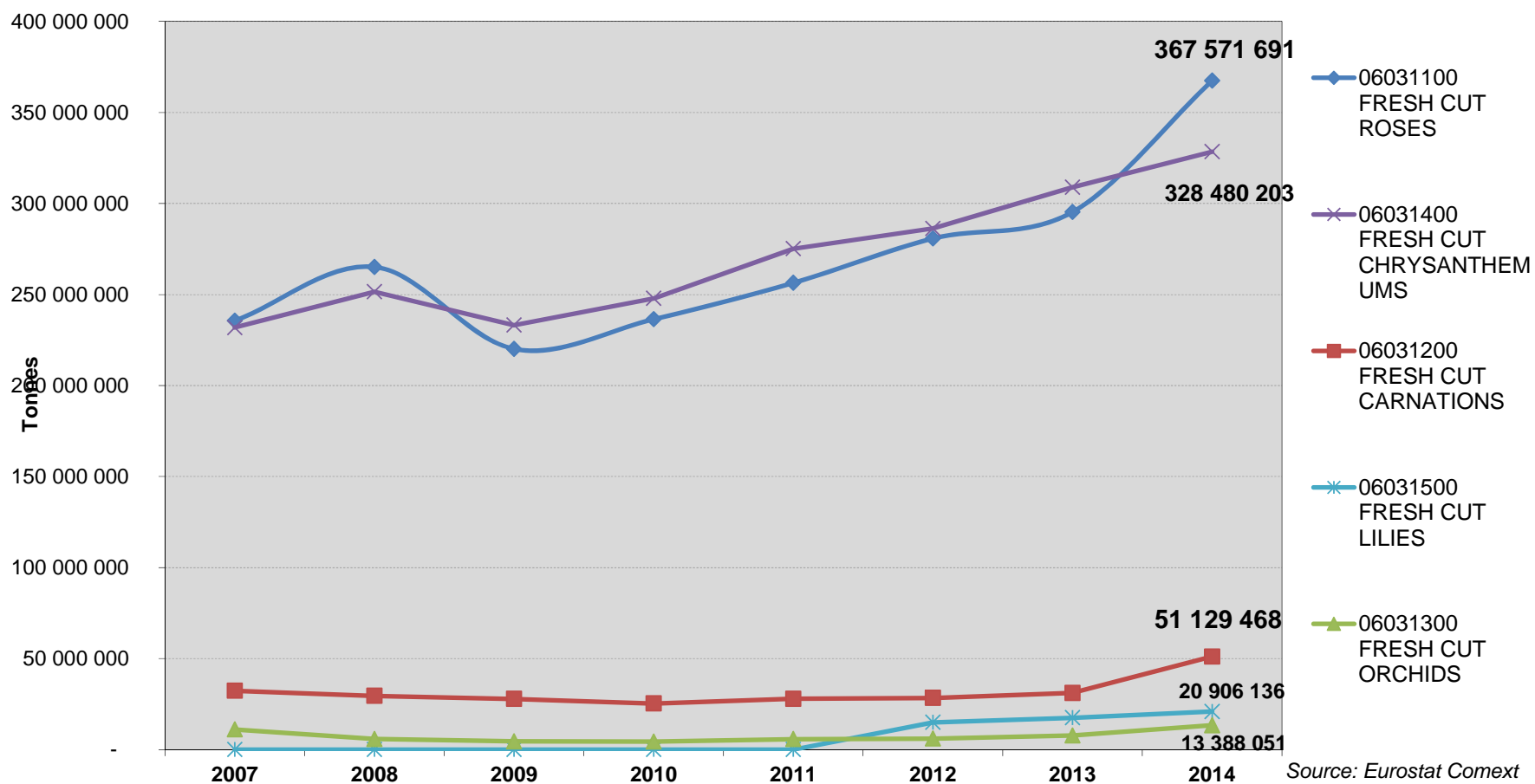


EU Export of some cut flowers (CN-code 0603) Evolution 2004- 2014



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Graph 6.2 Export of cut flowers to third countries (number of pieces)



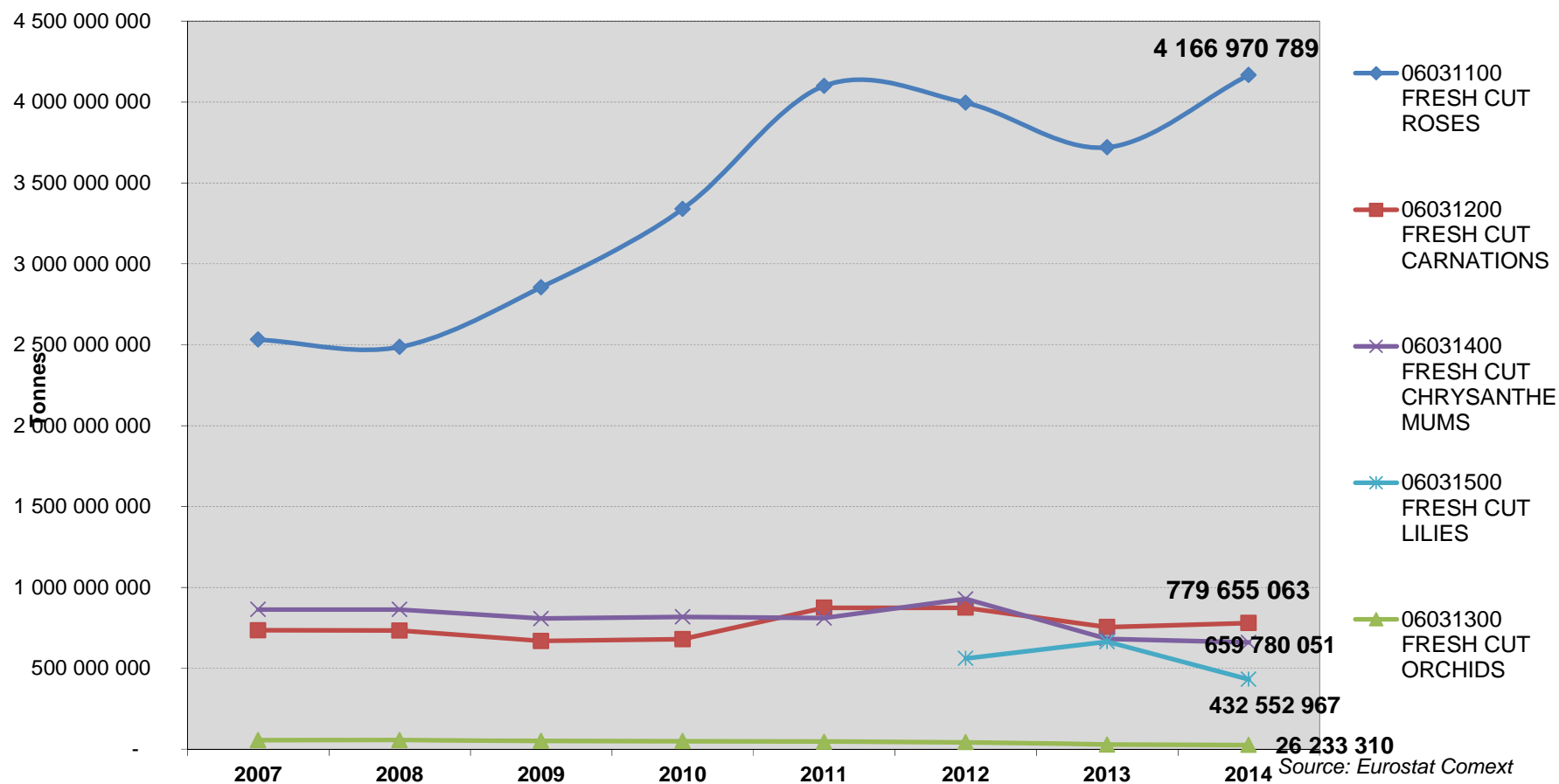


Export intra EU28 of some cut flowers (CN-code 0603) Evolution 2004- 2014



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Graph 6.3 Export of cut flowers inside EU28 (number of pieces)





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Thank you for your attention

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