



## International Vision for Ornamental Horticulture Introduction to the project

Wednesday 27<sup>th</sup> January 2016

IPM Essen, Room N, 14.00 – 15.00



### INTRODUCTION TO THE PROJECT

The impact of globalisation on the ornamental horticulture industry is an important issue and the industry is facing a number of challenges:-

- New developing markets are emerging
- Increase in crop production in 'new' countries to meet these new market needs
- Stagnation/decline in production in traditional horticultural producing nations
- Stagnation/decline or slow growth in market demand in developed countries
- Globalisation of trade in all industry sectors is increasing
- Lack of adequate knowledge on how the dynamics of global ornamentals production and demand is changing
- Need to identify new market opportunities and where these are in the world
- Need to identify countries with greatest potential for increasing competitive production
- Need to understand scope for increased international trade including barriers to trade

In the past the production and marketing of ornamentals has been focused around servicing demand in developed countries. The associated trading and logistics infrastructure has developed around this model. For many years the industry has

been expanding production in developing countries (with lower production costs) but still with a market focus on the traditional market, particularly Northern Europe and North America. In these cases the majority of product exported from developing countries has been cut flowers, rather than potted plants, due to transport costs.

Countries such as China and Kenya are changing the structure of international trade and developing their own production capabilities and alongside this their own research and innovation which will in turn strengthen their competitive position as they take control of their own industries rather than just responding to or being led by the 'old markets'. Not all of them will develop an ornamentals production capability, export capability or market but some of them will and the international ornamentals industry needs to understand what is happening and to forecast what may happen in the future. Overall the power base for global ornamentals production is shifting. How and where needs to be more fully understood for the benefit of growers in every country.

### THE AIM OF THE PROJECT

The aim of this project is to increase this understanding, forecast future changes in the structure of the industry and to identify opportunities to grow the overall international market for ornamental crops.

If you wish to attend please contact  
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AIPH are in a unique position to be able to lead and manage this project. AIPH will be able to facilitate the collation and analysis of industry data, information (quantitative and qualitative) and have the experience through its existing international network with grower associations around the globe. The project will also identify how this role can be strengthened for the future in a way that genuinely includes all the relevant nations of the world.

The project is being funded by the Dutch Product Board, with AIPH initially working on the project with FloraHolland but over time it is envisaged that the project will facilitate the development of an international association partnership model building a network of international organisations who have an interest in developing the ornamentals market.

We would like to invite you to a session where we would like to introduce the project, ask you to be involved in the process and outline what benefits there will be for you. We plan on updating those involved in the project regularly on the project's progress.

FIND OUT HOW YOU CAN BECOME  
INVOLVED IN A GLOBAL NETWORK OF  
PARTNERS INTERESTED IN DEVELOPING  
THE INTERNATIONAL ORNAMENTALS  
MARKET