

fci

FloraCulture International

March-April 2017

**The Future of Horticulture:
Creating a Culture
of Quality**

Agora Group
**A fish out
of water**

The Rarest Rose
Award-winning
Avalanche
An exclusive interview

Florist Neill Strain
Floral Couture
**Be Fashion,
Not Victim**

Fruitful Lessons

From the world leader in kiwifruit
Zespri CEO Lain Jager

A close-up photograph of yellow lily flowers and buds. A purple rectangular overlay with rounded corners is centered on the image. The overlay contains white text and decorative elements. The background shows several yellow lily petals with dark spots and green buds.

6-9 JUNE 2017

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LILY
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COLLECTIVE TRIALS

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Preface

Facts, Figures, FloraCulture International

Welcome to the new-look FloraCulture International, your gateway to global ornamental horticulture. In a constantly changing world FCI is moving with the times, keeping you up to date with the consequences changes have on the horticultural sector. If we want the ornamental horticulture to bloom it's essential to bring people, markets, cultures and knowledge together. FCI helps you to do this.

The new FCI has 2 pillars: Each issue will have a theme and we will highlight a different continent, giving specific attention to a country and city therein.

In this issue we will focus on various aspects of quality, something Zestri's CEO knows all about considering his monumental success. We also report on the latest European developments for the florists, what for impact will Brexit have on the ornamental sector in England and how does a high end London florist always surprise his clients. Also new are 2 columnists from the Royal FloraHolland cooperative, who in this issue share their knowledge and vision on quality.

We hope you enjoy reading the renewed FCI. Let us know what you think at: info@floracultureinternational.com

FCI Team

Colophon

FloraCulture International

is an independent international trade magazine gifted to the floral industry by Royal FloraHolland. FCI shares knowledge within the industry by bringing together markets, people and cultures because we believe this will make us all bloom.

FCI team

Katja Bouwmeester (editor in chief), Ron van der Ploeg (editor), Piet Kralt (editor), Rianne Nieuwenhuize (editor), Angie Duffree (traffic & sales) and a number of highly talented journalists and photographers.

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Contents

Minds



What could the flower industry learn from Zespri, a New Zealand group of kiwi growers? Zespri has been successful on aspects like differentiation, branding, marketing and a steady quality policy. That's why FCI gladly gives the floor to Zespri CEO Lain Jager.

30 Up close

Buxus grower meets market demand

Buxus grower Adrie van Dun from Topbuxus (Strijbeek) is a natural person in heart and soul. He's been working in horticulture for 30 years and has never regretted one day of his career. Now he is the largest buxus grower in the Netherlands.

32 Showcase

Luxe Blooms

Mayesh, one of the USA's leading wholesale distributors of cut flowers, has added a Luxe Blooms showcase for the cream of the ornamental crop.

Columns



Quality and Branding

Fred van Tol

Team Manager Account
Management Royal FloraHolland
Representing international flower growers



Customer Satisfaction

Frits Jonk

Manager of Royal FloraHolland's
Test & Quality Centre



Getting your money's worth!

John Ingwersen

CEO Jungle Jack's Plumerias

Meetings

12



Agora Group: A fish out of water

New Flagship Store

Two Belgian companies, wholesalers Agora and Azalea grower Tom Leybaert find new ways to get connected to clients by branding their company and their product. This is how they deal with quality challenges.

8 Getting together

Veiling Rhein-Maas

Early this year Uwe Bedenbecker and Marc Schax were named CEOs of Veiling Rhein-Maas, succeeding Ruud Knorr. Bedenbecker will be in charge of clock and commercial activities, Schax of logistics and financial activities. FloraCulture International met both at IPM Essen.

14 Feature

Revolutionary Rhododendrons

Don't tell grower Tom Leybaert that Rhododendrons and Azaleas have become a bore. Immediately he'll point to bold branding examples and breeding breakthroughs. Even if your product struggles with an image problem, you can still engage with your customers. In this FCI edition he reveals his secrets...

Markets

18



Britain, Gloomy or Bloomy?

What consequences will Brexit have on the floral business? How will it influence flower and plant sales and imports? These are questions we have had since the British voted to leave the EU last June. Since negotiations between Britain and the EU have only just started, it's too early to tell. But we are already seeing consequences.

16 Continent

Arranging the future

As the European floral sector changes rapidly, it's necessary to understand what's really happening. Here's a sneak peek at the 2017 European Florist Sector Report, scheduled for release June 2017.

20 Country

Export to UK in decline

Ever since the United Kingdom voted for Brexit, exports to the UK have started to dwindle. In 2015, the Netherlands exported 925 million euros worth of flowers and plants to Great-Britain, but in 2016 the export value was just 883 million euros. Data show that there's been a sharp decline in the export of cut flowers, while the export of plants stayed level.

22 City

Floral Couture

It's no secret. The gap between flower farmers and the new generation high end consumer is wide. Luxury florist Neill Strain turns the tide!

34 Case

State of the industry

European garden centres are very important outlets for plants. So it makes sense to investigate garden centres at the European level. FCI spoke with expert Oliver Mathys from 'I green you' about developments in Germany, Holland, Britain and France.



Lily Extravaganza

6-9 JUNE 2017

**DUTCH
LILY
DAYS**

COLLECTIVE TRIALS

Lilies will be under the spotlight during the Dutch Lily Days that run from June 6-9 2017. The 'open-house' event is designed to showcase these spectacular flowers in all their glory at 13 of the leading lily nurseries across the north west of Holland. The participating nurseries are all in close proximity and geared up to promote, market and spread the love of this beautiful flower.

These leading lily nurseries literally open their doors to welcome visitors from around the world to see this ancient industry and the remarkable flowers up close. It's a hotbed of discussion, celebrating the excellence in Dutch lily breeding, cultivation and marketing and the place to see the freshest, latest developments in the lily growing industry.

On-trend

Lilies are on trend across the world, with plant breeders launching a raft of new varieties exhibiting not just fabulous new colours and showier forms, but also improved disease resistance, making the plants less demanding in terms of crop protection and pest control. Potted lilies are another growing trend, but it's the pollen-free doubles that are proving a popular choice with florists, retailers and floral event managers.

Exciting Developments

Lily cultivation is thriving and during the four Dutch Lily Days the Netherlands becomes the epicenter of the international lily trade and a showcase for this evocative flower. Familiar favourites and some groundbreaking strains are all on show for the lily connoisseur.

"There are many new lily varieties this year," says Arie Alders Export Manager for De Jong Lelies. "Every year there are a hundred or more applications for breeders' rights being requested for new lily varieties. This season, most of those new varieties will be on show during Dutch Lily Days. There are more and more double flowering types in all the lily groups, such as Double Oriental lilies, Oriental Trumpet lilies, Asiatic lilies and Longiflorum Asiatic lilies.

Almost all breeding companies are showing new double Oriental varieties. They are very popular with new varieties from the Rose lily brand (roselily.com) but also varieties such as the double Orientals 'Kadango', 'Sara Bernhardt' and 'Snowboard' from Vletter & Den Haan. Double lilies have in common that the stamen of the flowers have been changed into petals which doubles the number of petals from 6 to 12, but in some varieties there can be more than thirty. But the biggest advantage of double flowering lilies is that they are pollen free, so no more pollen stains on your clothing after handling the open flowers," explains Arie Alders.

Flower Trials Opportunity

The four-day lily extravaganza is timed to run a few days before the infamous Flower Trials, to enable visitors travelling from afar to see both events on one trip. The grand opening for the Dutch Lily Days is at Van den Bos Flowerbulbs. "This year there are 13 exhibitors. This is one less compared to 2016, because the breeding activities of Marklily has been taken over by Vletter & Den Haan," explains Arie Alders.

The participating nurseries are in and around the north west of Holland and include Van den Bos Flowerbulbs; BOT Flowerbulbs; De Jong Lelies Holland; Lily Company; Mak Breeding; Onings Holland Flowerbulbs; C. Steenvoorden; GAV Lilies; Gebr. Vletter & Den Haan; VWS Flowerbulbs; World Breeding; Zabo Plant and Van Zanten Flowerbulbs.

For more information please visit www.dutchlilydays.nl

Quality and Branding

At Royal FloraHolland we recently asked our growers and their clients, the traders, what they most urgently need when selling or buying flowers and plants. Both groups rated 'product quality and reliable product information' as the most important. Quality wise buyers want to get what they buy. Growers only sleep well when their products fully meet the customer's expectations. The challenge is to find each other.

In this digital world you need a good name. Branding becomes more important in our industry since digital is the standard in our supply chain. If you can review a hotel, you can also review a breeder, a grower, an exporter or a florist. Sure this will change business. Not only the product name will be important, but also the name of the grower, exporter, transport company, etc. Ranking 3.0.

Since flowers and plants are sold by digital systems, everyone in the chain, from breeders to consumers, can have access to all quality information. They can and will react to this information. What do you think a breeder or grower will do if he finds out that a wholesaler is making a mess with his products? There are better ways such as the wholesaler's website I saw recently, showing a series of captivating and professional looking photos to support the grower's product. Why not also use promotional videos to offer a behind-the-scenes look at the nursery? Imagine what a boost this will give to their customers a channel-specific quality control, from post-harvest until delivery.

No one expects five star quality in a two star hotel. Quality is not about the best, biggest or tallest. It's about meeting the expectations of the one you're selling to by delivering to the specifications you agreed upon. Or be better than that. So you should know where your product will be sold. In a high-end London or Paris flowers shop or at a Bielefeld discount super market. The final destination will tell you about size and specs. If everyone in the chain sees to it that these are met, the end customers will get what he or she bought. No need to say this asks for an open chain communication. No need to say too that this will strengthen our overall position as an industry.

A picture is worth a thousand online sales. Meanwhile almost all Royal FloraHolland growers submit digital images both for clock and for online sales. Providing the adequate reliable product information needed in a digital world is a good start to sleeping better at night.

Fred van Tol

Team Manager Account Management
Royal FloraHolland Representing
international flower growers

Want to know more?

www.royalfloraholland.com/qualitypolicy

Getting together



Veiling Rhein-Maas

Confident Marketplace

“As a German-Dutch auction, ‘local for local’ is no issue for us. Clients buy the flowers they want. Some will pay attention to the origin of their products, others won’t.”

Uwe Bedenbecker (left)
Managing Director at
Veiling Rhein-Maas

“We try to create a company culture that combines the best of the two countries.”

Marc Schax (Right)
Managing Director at
Veiling Rhein-Maas



Early this year Uwe Bedenbecker and Marc Schax were named CEOs of Veiling Rhein-Maas, succeeding Ruud Knorr. Bedenbecker will be in charge of clock and commercial activities, Schax of logistics and financial activities. FloraCulture International met both at IPM Essen.

Germany is by far Europe’s most important floral market which has a very strong relationship with the Dutch. Why?

“Because both countries get along well culturally, having long trade relations, including flowers and plants. Speaking of Veiling Rhein-Maas, we try to create a company culture that combines the best of the two countries.”

People say Germany is a mature market but still young florists find new niches. What’s your opinion on that?

“The German market has never stopped growing. A 2% increase in 2016 with similar expectations in 2017 doesn’t look like a mature standstill. Veiling Rhein-Maas contributed to new developments during Rhein-Maas Next, a presentation for young FDF-florists of new sales concepts and trends. We want the growth to continue for florists.”

The Dutch say that quality-wise they’re unrivalled. Are they?

“At Veiling Rhein-Maas flowers and plants aren’t valued on country of origin, but on quality. Good products can come from anywhere. As an auction

house, we give particular attention to special qualities, auctioning them as ‘Premium Quality’. Half of this stock is Dutch, the other half German.

As a German-Dutch auction, ‘local for local’ is no issue for us. Clients buy the flowers they want. Some will pay attention to the origin of their products, others won’t.”

How does Veiling Rhein-Maas deal with sustainability and fair trade?

“Sustainability is a big trend in Germany and so is fair trade. Early this year we started auctioning Fairtrade Roses after announcing this on our Clients- and Suppliers Day where the central theme was sustainability.”

German discounters have strengthened their position in the market. How does that influence clock sales at Veiling Rhein-Maas?

“Since we started Veiling Rhein-Maas in 2010, clock sales have risen significantly. Traditional channels (florist, market, garden centre, etc.) still account for 55% of our turnover. We support these channels by showing product presentations by Rhein-Maas Next for young florists and by

publishing a special magazine for our customers.”

Dutch exporters tend to neglect Veiling Rhein-Maas’ supplies. How come?

Although we are just across the border, we’re doing business in another country, which means doing business in a different judicial and fiscal system. Nevertheless, numerous Dutch buyers and growers find their way to our auction. We are present at fairs like IPM to meet new clients one-on-one.”

Royal FloraHolland will start its new auctioning later this year. What are your plans?

“When we asked them about it last year, the vast majority of our clients said they wanted to stick to the auction clock. That’s why we’ll keep developing it in addition to working at long Remote Buying system, Clock services and Clock Pre Sales. Royal FloraHolland will change its system but the basis will remain a form of auctioning. Since we have a close relationship with colleagues in Holland, we will follow what they do.”

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Getting your money's worth!

There are few words more overused in the lexicon of marketing than 'quality'. Everyone seems to want to have something newer, improved, enhanced, or sometimes, just the same old thing in fancy new packaging. I suppose that's just human nature, always the desire for something better, or which presents the perception thereof. However, at the root of all this is quality. Interesting word, 'quality'. Most of us would be hard pressed to define it, but at the same time we all instinctively know it when we see it.

A good example of this – from my own experience – would be a plumeria cutting. Say, for instance, I offer a cutting with three branches. So do my competitors. What makes mine better – never worse ;-) than theirs? If you follow the basic definition, as long as the cutting has three branches, it would meet the core expectation set by the description. But quality shouldn't always be about meeting basic expectations, and it isn't. I'm sure we'd all agree that a Fiat has four wheels and will generally succeed in taking you places, but who wouldn't prefer to drive a Mercedes? The bottom line is that businesses succeed or fail not by meeting basic expectations, but by exceeding them, and in the best of cases, setting entirely new levels of expectations.

As a business owner, one of the key challenges is to ensure that your own – and no one can deny they're not biased – perception or definition of quality either matches your customers' expectations, or presents a unique advantage over your competitors view of quality. This isn't necessarily rocket science. In my view, you simply need to shift your viewpoint from that of producer to consumer, and ask yourself, 'do I feel this flower or plant – product – is worth the money?' Assuming you can answer that question with a modicum of honesty, you're well on your way to understanding the quality of the product you're offering.

I know, logic tells you quality is more complicated. Cost is a factor, competition is stiff and unpredictable, and change is the only constant. However, for myself, the equation is very simple. If I wouldn't buy it I won't sell it. Ultimately, that's how I define and attempt to deliver quality.

John Ingwersen

CEO Jungle Jack's Plumerias

A surreal image of a goldfish swimming in a glass vase with white roses and green leaves. The goldfish is orange and is positioned in the upper left quadrant of the frame. It appears to be swimming upwards, with its fins spread. The vase is filled with water, and there are several white roses with green leaves inside. The background is a plain, light gray. The overall composition is artistic and unexpected, combining elements from different worlds.

Agora Group: A fish out of water

New Flagship Store

Two Belgian companies, wholesalers Agora and Azalea grower Tom Leybaert find new ways to get connected to clients by branding their company and their product. This is how they deal with quality challenges.

“It is important
to live life
being open
to new
possibilities”

Ellen & Nick Van Turnhout
Agora Group



Next year Agora Group will open a brand new flagship store in Aalsmeer – the Netherlands. For florists and garden retailers it will offer true inspiration; for growers this new showcase represents an opportunity for brand building. Meet the wholesaler 2.0!

Declining profits and structural changes in the industry are driving many floral wholesalers to reassess the way they procure and distribute their goods. It's also increasingly more important to provide unique value added services. With this in mind, Agora kicked off construction last January of a new, fully owned 10,000 m² centralised purchasing and distribution hub for cut flowers.

Additionally, plans are underway with Dobbe Flowers to jointly procure a 2500 m² cut flower cash and carry floor in Waterdrinker's future Green Trade Center. Both projects are slated to be finished by January 2018.

FCI talked to Ellen Van Turnhout and her brother, Nick, the family team responsible for Agora Group's new strategy. It turns out they fully understand that e-commerce is the new normal. However, they refuse to believe that physical cash and carry stores are on their way out. "We don't want our florists to feel like they're in the fishbowl of digital selling. The new store will be an excellent venue for inspiration, engagement and learning," Ellen explained.

TAPPING INTO EXPORT MARKETS

The Van Turnhouts are demonstrating vision and perseverance by investing in a one-stop shop for flowers despite the fact that in Western Europe the number of florists continues to decline. The much-needed concentration of purchasing power and the new distribution hub in Aalsmeer will allow them to tap into export markets.

Agora also wants to engage with supplier growers in Europe. Ellen: "The goal is to create a memorable supplier showcase. Growers should associate our name with one of the best platforms to launch their products and build their brands."

RETHINKING THE SUPPLY CHAIN

A floral wholesaler 2.0 needs to continually update its market knowledge. Nick enthusiastically acknowledges their vision behind the new proposition: "The internet forces us to rethink our supply chain. Our florists and garden retailers tell us that customers' buying habits have never been more diverse. They find it increasingly difficult to understand and manage customer's expectations. We are dedicated to making market information both straightforward and shareable."



Revolutionary Rhododendrons

Branding Examples & Breeding Breakthroughs

Don't tell grower Tom Leybaert that Rhododendrons and Azaleas have become a bore. Immediately he'll point to bold branding examples and breeding breakthroughs. Even if your product struggles with an image problem, you can still engage with your customers. In this FCI edition he reveals his secrets...

Bloemisterij Leybaert is a truly export-oriented company with 19 ha under glass and 5 ha field-production of an estimated 2,500,000 plants per year with Rhododendron and Azalea indica being the major crops.

Leybaert grows his Rhododendrons mainly in two and five litre pots. During summer months plants are moved outside or in revolutionary retractable

greenhouses with anti-hail netting. Rhododendrons are a quintessential seasonal business with peak sales in Spring (80%) and Autumn (20%).

ATTRACTING YOUNGER CONSUMERS BY BRANDING

Unlike Rhododendrons, Leybaert Azaleas are a semi-finished product. Danish, Swedish, German, French and Belgian growers start with a budded, ready to finish Azalea forcing them into bloom with adequate light levels and temperatures ranging from 22°C to 25°C. Leybaert: "Today it is more important than ever to engage with customers. As everyone knows things are not easy. Production areas continue to decrease as the plant suffers from an image problem. But even Azaleas are sexy enough to attract younger consumers. We put a lot of effort into product promotion. For instance, by taking part in consumer-facing events and by launching My Favourite-brand for premium quality, trendy Rhododendrons."

ENJOYING STRONGER DEMAND BY BREEDING

Leybaert tells us that innovation is the cornerstone of the company: "In Azaleas we are working with the breeders of the Floré Group. They have created a range of potted Hortinno Azaleas that deliver excellent keeping quality for four to six weeks. Also these plants stand out for their lusciously glistening leaves and non-shedding blooms."

He continues: "One of the first outcomes of the Hortinno breeding programme was the XXL Rhododendron. This beautiful new product provides a real wow factor due to its strikingly large racemes and extended flowering period. Enjoying strong demand are our Rhododendron mini trees with a 12-month crop time. Trimmed in lollipop standards, these Rhododendrons feature big, green leaves and large, colorful buds for retail appeal. So they attract younger customers."

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Continent
Country
City

Arranging the future

European floral sector report

“ Unlike older florists, Millennium colleagues focus on two or three important points. These flower shops have become décor outlets, offering home furnishings and flowers as an experience.”

Mike Bourguignon

is a florist and comes from an family of Madrid florists. He is also the Association Manager of Florint, the international organization of florists. Mike grew up and was educated in several countries so he knows about international cultures and practices.



As the European floral sector changes rapidly, it's necessary to understand what's really happening. Here's a sneak peek at the 2017 European Florist Sector Report, scheduled for release June 2017.

Florint represents 120,000 florists throughout Europe and gathers information from member associations who represent florists both locally and nationally. The report includes surveys of 14 of its members: Belgium, the Netherlands, Norway, Austria, Germany, Denmark, Estonia, Spain, Finland, Croatia, Poland, Romania, the UK and Ukraine (350 million Europeans in total). It includes key statistics by country, market analysis and competitive landscape characteristics, as well as business challenges and solutions.

The study sees a mix of challenges in various countries. In markets with an entrenched floral culture (Holland, Germany, France, the UK), florists can buy a wide variety of quality flowers at relatively low prices. But since significant new players entered the market they have had to add value. FDF (Germany's Florist Association) says this is their members' key priority. a Bucharest florist with many diverse customers and domestic consumption on the rise needs the right stock to start with. Florists in Athens and Madrid know all about being flexible in a recession. In the UK, with a culture fixated on Primark deals, florists feel the effects of brutal competition from supermarkets and online outlets.

PLATEAU OF SORTS

In recent years the European floral sector has seen sales fall and shops

close. In 2015, Florint reported a 19% decrease in sales and a similar share of professional florists closing their shops. "Although in the past two years the decline stopped, we've seen a plateau of sorts. It's a culture of limited spending which those florists who have survived have finally adapted to," says Florint's Mike Bourguignon. "Florists still have a lot of homework to do. New flower shops have popped up, but often with completely new concepts. Unlike older florists, Millennium colleagues focus on two or three important points. These flower shops have become décor outlets, offering home furnishings and flowers as an experience. They live and thrive through their new community and clientele online. They take marketing and business seriously, being more aggressive and present at all costs."

HEALTHY INNOVATION

The European floral industry, however, is competitive, dynamic and trend-driven in a period of healthy innovation. Business experts predict the return of the cottage industry. It's all about the revival of local manufacturing and smaller, dedicated and individual businesses. For a florist this is the time to start or revamp his business as marketing opportunities abound. And the internet is king.

Florists are embracing new ideas and opening trendy flower shops. But it's complicated. They say customers' buying habits have never been more diverse and find it difficult to understand and manage customers' expectations. One of the Florint solutions is better knowledge of consumer marketing, which should not be undertaken individually but in cooperation with trade associations to keep abreast of what is happening in the market and learn how to adapt to it.

Valentine for free

Florint's Mike Bourguignon, who is also a florist in Madrid, Spain, found a way to attract his clients on Valentine's Day by making a hit movie on YouTube. "In Spain we have three Valentine prejudices," he says. "People only buy flowers at V-Day, and let's be honest, there are better times to buy flowers than February. V-Day is about couples. Why should single people be left out? Spanish florists claim there's no floral culture in Spain, but for Spanish customers flowers are in their top 20 gifts.

So we made a movie (cost: 250 euros) to put an end to these prejudices and show the power of flowers. It shows loud and clear that people love flowers. On Valentine's Day we prepared eight bouquets that people could take for free without anybody noticing except our candid camera. The reactions, emotions and faces were priceless. People do love flowers. The message of love with flowers works for everyone. We created a community message. No selling or pushing, just pulling to show the true effect of giving flowers. And that's all there is."



See the Bourguignon movie at:

<https://www.youtube.com/watch?v=5COqM1seRtA&t=3s>

Continent
Country
City



Britain, Gloomy or Bloomy?

What consequences will Brexit have on the floral business? How will it influence flower and plant sales and imports? These are questions we have had since the British voted to leave the EU last June.

Since negotiations between Britain and the EU have only just started, it's too early to tell. But we are already seeing consequences.

Dutch exports to the UK dropped by 6% in January 2017, compared to January 2016. Although most flowers sold in Britain are produced or traded by the Dutch, the British didn't stop buying flowers and plants. Export decrease was mainly caused by the exchange rate of the pound to the euro.

Wholesalers say the climate is gloomier since British retailers tend to pay less for the products they import in order to compensate for the pound-euro losses.

GIVE AWAY PRODUCT

Still Britain remains a bloomy market. Asked what product they would give as a gift, 12% of Brits said cut flowers. This underlines the potential that exists in this market. Most British gifts are given to partners, friends, mothers and children. Everyone has either a partner or friends or family, so everyone has a reason to give. The more florists succeed in convincing people to give flowers (and plants), the more potential. On top of that, supermarkets have succeeded in convincing British consumers to buy flowers for themselves.

THE USUAL SUSPECTS

Which flowers and plants are popular in Britain? One could say the usual

suspects: Chrysanthemum, gerbera, rose, lily, freesia and tulips flowers. Additionally, Phalaenopsis, Kalanchoe, rose, poinsettia, chrysanthemum and heder plants. It's difficult to draw any conclusion from this list. Relatively cheap flowers, tulips, for example, have become more popular over the last few years. Then again, relatively expensive flowers, such as Lisianthus, have also become more popular. The statistics on house plants say even less. It's not too bold to say that they only tell us about trends and nothing about the general market.

GLOOMY OR BLOOMY

If there had been no Brexit, the British flower and plant market would certainly still be bloomy. However, the economic outlook is positive; the Brexit vote will not change that in the short term. The big question is what the Brexit negotiations will bring. It seems certain that it won't make life any easier for the industry. On the other hand, British people won't change so they will still buy flowers and plants. The only fear we should have is negotiators using our product as small change in their negotiations. Bloomy or gloomy, it seems too early to say, but it looks like there's little reason for pessimism.

New chance for British growers?

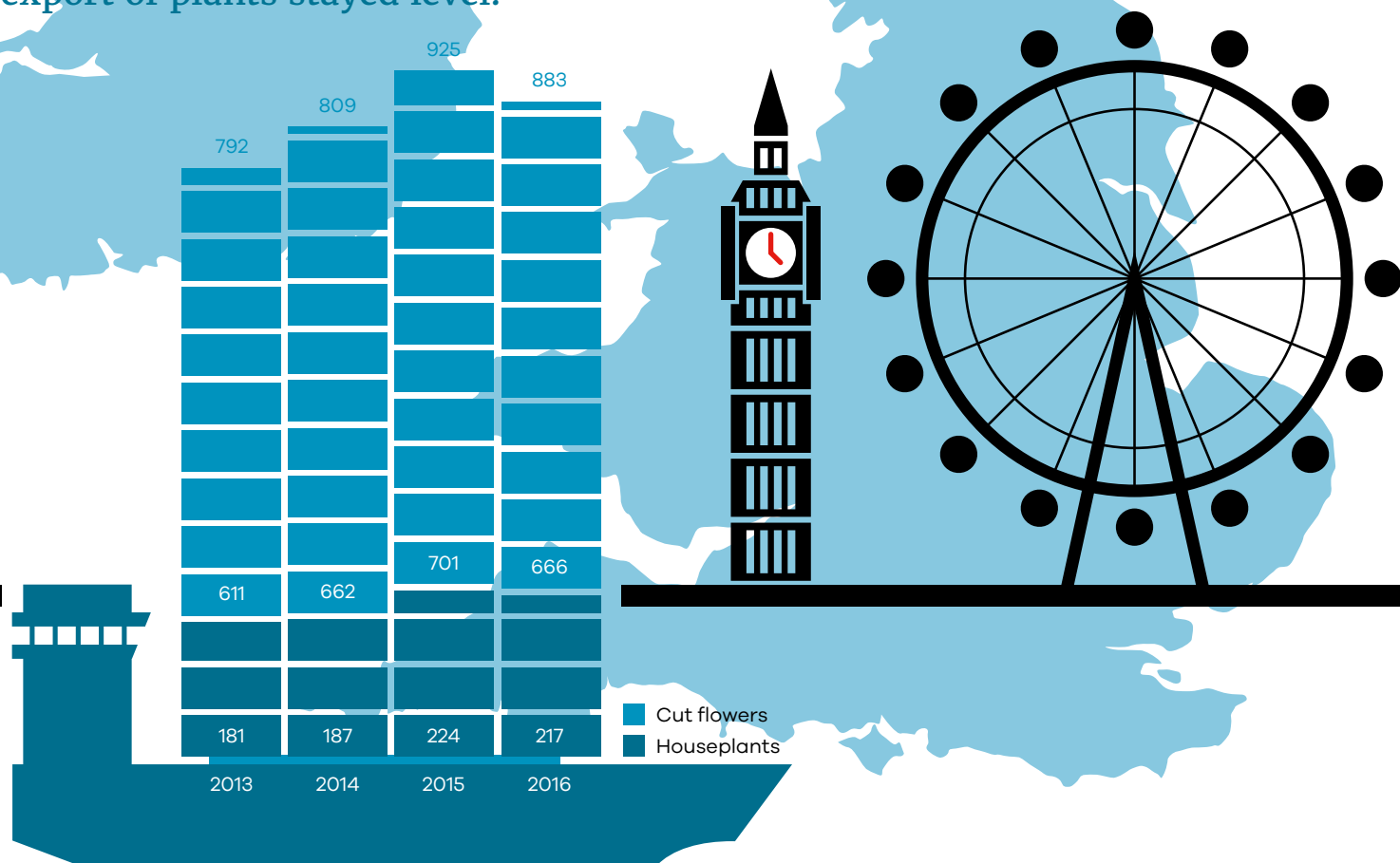
"No one knows the consequences of Brexit. But Brexit stands for trends we can adapt to," says Steven France, CEO of Florismart, a florist-oriented trade website bringing supplies of various exporters to florists.

On florismart.com florists can buy flowers from various wholesalers in the quantities and of the quality they need. Florismart takes care of logistics. "This logistic system can also be used for the benefit of British growers," says France. "After Dutch flower exports became big, British florists stopped buying British flowers. The Dutch weren't focused on co-operating with British growers. They sold their own products. Therefore, and because of the lack of good logistics, British flowers became supermarket flowers.

Over the past eighteen months Florismart has grown strongly. We can now invest in building better logistics for the British growers thereby making them more interesting to British florists. Buying British was already in progress before the Brexit discussion, so we'll adapt to it"

Export to UK in decline since Brexit vote

Ever since the United Kingdom voted for Brexit, exports to the UK have started to dwindle. In 2015, the Netherlands exported 925 million euros worth of flowers and plants to Great-Britain, but in 2016 the export value was just 883 million euros. Data show that there's been a sharp decline in the export of cut flowers, while the export of plants stayed level.



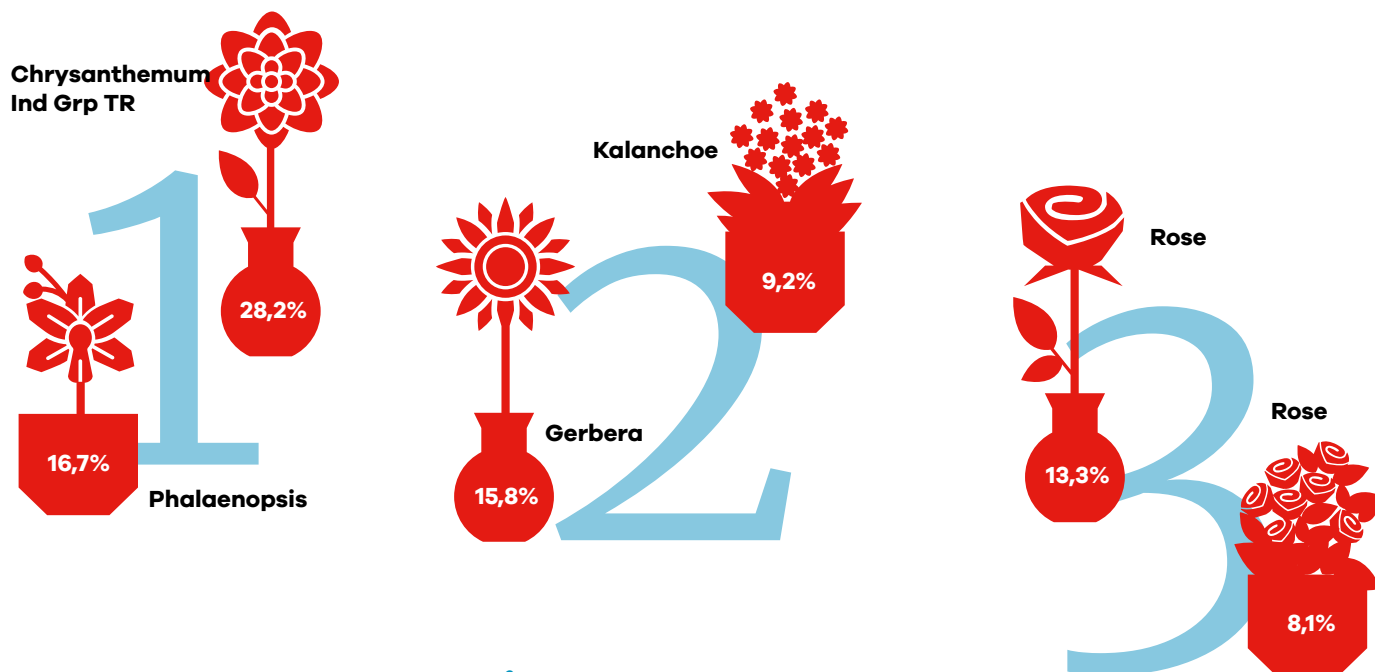
Export flowers and plants

value x €1 Million

Source: Royal FloraHolland and Floridata.

Top 3 – Sales Cut Flowers & Houseplants

in percentages



Average sale price per channel 2016

value x €1 Million

- Supermarket
- Street market
- Florist
- Internet

Cut flowers

€8.55

€10.14

€16.80

€19.18

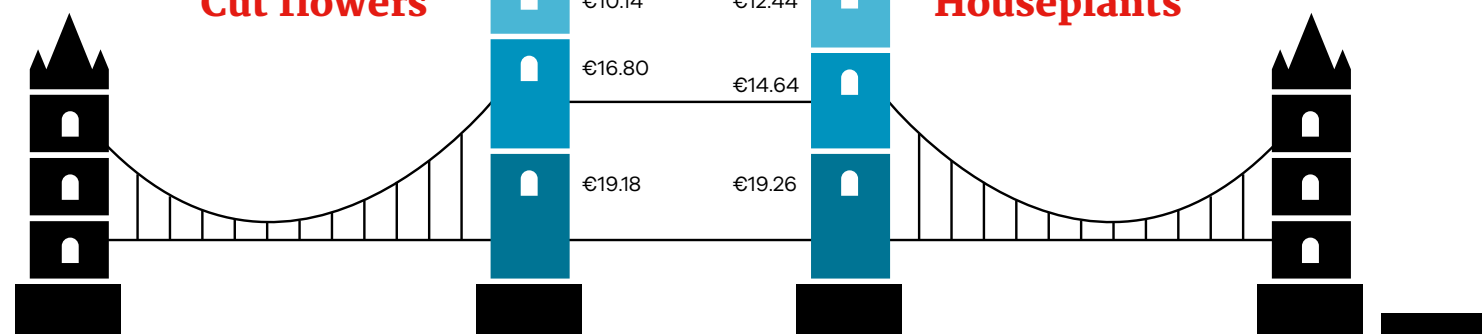
€9.15

€12.44

€14.64

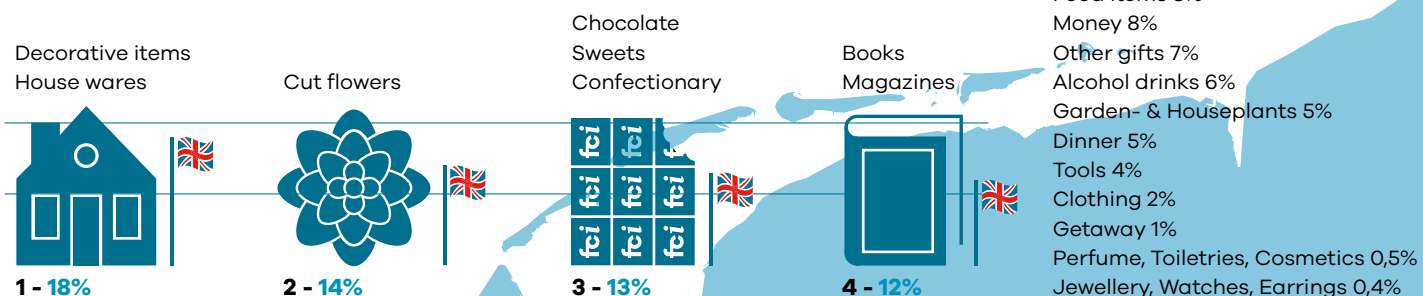
€19.26

Houseplants



Top 4 – Type of Gift bought 2016

in percentages, multiple answers possible





Floral Couture

Be Fashion, Not Victim

It's no secret. The gap between flower farmers and the new generation high end consumer is wide. Luxury florist Neill Strain turns the tide!

“We are renowned across the globe for our show-stopping wow factor”

Neill
Owner, Floral Couture



Neill is the proud owner of Floral Couture. This high-end boutique is based in Belgravia, London, the place to be for socialites, royalty and wealthy foreigners. Serving the rich and famous, his signature style is opulent and elegant with a theatrical twist. Is this his way to manage the gap?

ATTRACTING ATTENTION

Neill states, "We are influenced by our clients' desires and styles, but we always use the finest flowers. Sometimes this includes rare specimens, the longest stems and biggest blooms available from our specialised growers. With this extraordinary material we create luxurious designs, rich in colour and texture. We are renowned across the globe for theatrical installations with a show-stopping wow factor we create outside the Belgravia boutique throughout the year."

ADAPTING TO TRENDS

Neill named the business Floral Couture because of his love of fashion: "We are


very conscious of the fashions in our work at the boutique. Especially in our hand-tied bouquets and arrangements, we adapt to colour trends and the use of textures when appropriate. I firmly believe our luxurious designs and our theatrical installations do have a major influence on the floral industry."

FCI asks him if there is such a thing as a typically English preference? "It is true that many English customers enjoy the soft hues that are reminiscent of a traditional English cottage garden. In Belgravia, however, we have a lot of non-British clients from Russia, the Middle East, China, the U.S. and other European countries. So we cater to all of these different tastes", Neill answered.

GETTING INVOLVED

Many years ago Neill learned that there were very high quality flowers from growers in Holland that he was not finding in the U.K. "Since then, I have spent time visiting the best growers, guided by my contact in Holland, to build a relationship with

these people passionate about creating and growing the finest blooms. It is difficult for growers to know what our customers like; a flower that looks odd in the greenhouse because it is not quite like the rest can be beautiful when properly designed and presented to the customer. For a floral designer, to be aware and involved at the growing stage, however little, is beneficial – just as a good chef sources his vegetables and wants to know where and how they are grown. The story of the grower helps us to connect with our customers."

A portrait of Lain Jager, CEO of Zespri, smiling. He is wearing a blue and white checkered shirt under a dark jacket. The background is a blurred green outdoor setting.

“the floral business is tougher than the kiwi business, because most of your products have a very short life”

Lain Jager
CEO Zespri

Fruitful Lessons

from the world leader
in kiwifruit



Ready for a story that
will make you green with envy?

Horticulture has been slow in positioning their products as premium brands. Not so for cooperative corporate Zespri... Being the world's largest marketer in kiwifruit this company has successfully made differentiation their weapon of choice to fight price wars in commodity markets.

Departing Zespri CEO Lain Jager explains to FCI the company's basis for differentiation is quality centered around five key elements: traceability, quality grade, food safety, social responsibility and sustainability. Working with 3700 growers around the world, it is clear that effectively managing supplier quality and compliance are the top issues at Zespris.

We ask Jager about the characteristics of the Zespri brand. He tells us that above all it is important to be clear about the basis of competition. "Is the market a commodity market where businesses are competing on a commodity basis? If so factors such as scale, cost to serve, proximity to market and cost of capital become important. In fact most fresh markets are commodity markets and there is nothing wrong with that.

The other way to compete is to seek to differentiate your product so that customers and consumers will see that your product is different from other products and can therefore be positioned at a premium, consistent with its added value to the consumer."

SUPERIOR OFFERING

Jager continues: "Key questions are 'what is the basis of differentiation?' and 'is that differentiation sustainable?' Once these fundamental questions have been answered, the rest is implementation. Our basis of differentiation is quality. For kiwifruit that means growing higher dry matter kiwifruit than our competitors – we realize this by paying kiwifruit farmers for the dry matter in the fruit. We then deliver this superior offering with consistent quality through a well-managed supply chain, which is all about harvest and packing management and cool chain control. As well as partnering with leading distributors and retailers to deliver our product to consumers in optimal formats."

STRONG BRAND POSITIONING

Strong brand design and positioning developed through rigorous research, consistent implementation across markets over time, an unrelenting focus on the consumer value proposition compared with other fruit offerings and strong quality systems supported by integrated feedback and continuous improvement practices are essential components of the company's brand strategy, too.

"If I had to sum it up, I would say first comes the understanding of what is important to the consumer, then comes the product development and focus on consistent delivery and then our relationship with the consumer through our products. That's broader than just product attributes such as consistent quality and food safety and extends to what our product embodies through health, vitality and lifestyle," Jager adds.



CV

Lain Jager

has Masters of Psychology, Philosophy and English from University of Waikato, New Zealand. He joined Zespri in 1999 as Human Resources Manager (1999–2006), General Manager Supply Chain (2006–2008) and CEO since 2008. Last year Jager announced he will step down as CEO in early 2018.

Zespri

Zespri was founded by New Zealand Kiwi growers. It now sells kiwis in 54 countries which means 30 percent of the world trade volume of this product. Zespri's 2015 turnover was 939 million US dollars.

TRADE AND CONSUMER BRAND

According to Jager Zespri is both a trade and consumer brand but it means different things to different audiences. "For the trade this is about long term partnerships, growth, consistent quality and strong service levels supported by our fantastic people around the world. For consumers it's about fantastic tasting, fruit that is part of a healthy, vibrant life style."

Zespri has worked out a comprehensive quality system for every stage of the production process: cultivation, management, storage and transport. Working with nearly 3,700 growers around the world, it is clear that effectively managing supplier quality and compliance are top issues.

But how can you manage this worldwide? Jager: "You need a consistent global vision implemented locally by local experts. Not only Zespri people on the ground in 27 countries with offices in 22 countries, but extending this vision to our trade partners on a global scale. Comprehensive supply chain management is also important from orchard - inputs, maturity testing - to packhouse to ship to market."

The Zespri quality system is centered around five key elements: sustainability, traceability, social responsibility, quality grade and food safety. "Traceability, quality grade and food safety are vitally important and we have very well-developed systems to support these elements in our integrated quality system. The areas of social responsibility and sustainability are the most challenging currently because we know we can do better," Jager frankly admits.

BOTH PRODUCT-SUPPLY-DRIVEN

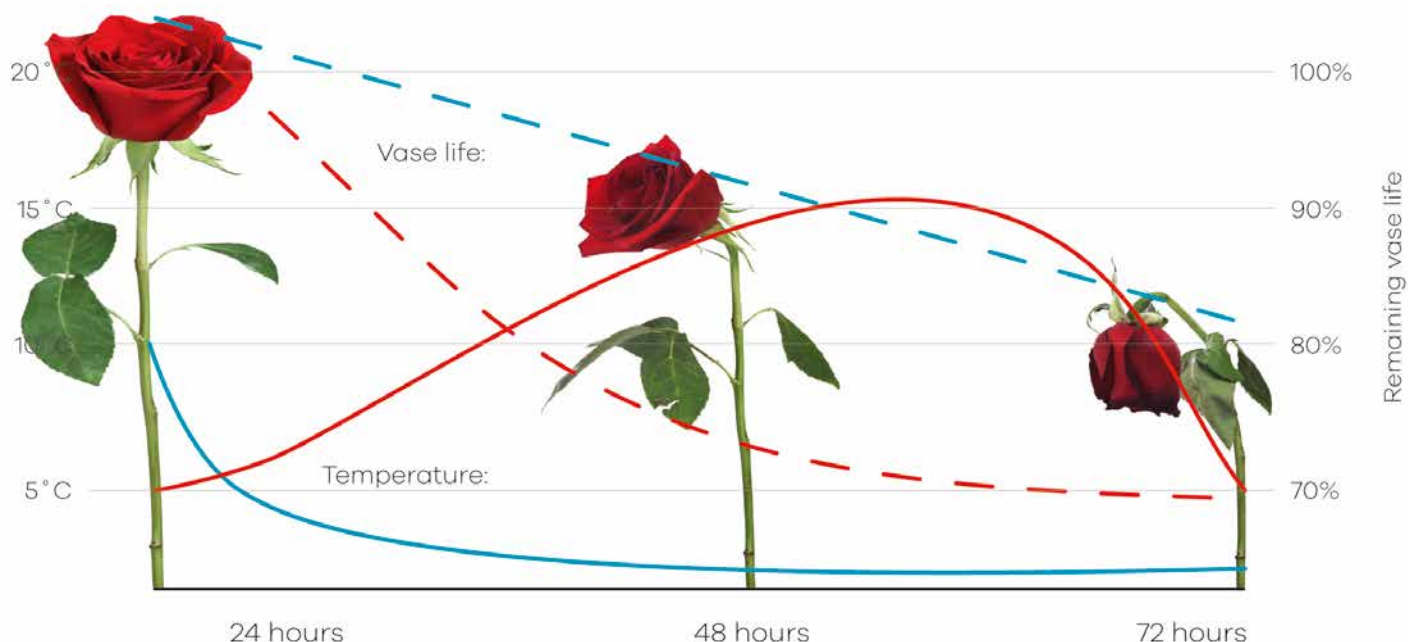
Jager tells FCI Zespri is both product-supply-driven and consumer demand-driven: "Product- supply-driven in the sense that part of our job is to sell the crop that our growers produce every year. Demand-driven in the sense that we are investing strongly to develop new kiwifruit cultivars with superior attributes, and that our whole quality system is aligned to grow and deliver the best quality kiwifruit possible to consumers 12 months of the year."

SYNERGY FLORAL BUSINESS

What kind of similarities and possible synergy does Jager see with the floral business? "Of course we are envious of the floral business - you have such beautiful, vibrant, products which bring color and joy to consumers' lives. We know that in some ways the floral business is tougher than the kiwi business, because most of your products have a very short life and this means you are even more susceptible than we are to demand fluctuations and have little room for supply chain error. We have much to learn from the floral business."

FlowerWatch

A cool story



FlowerWatch a Netherlands-based centre of expertise and worldwide trendsetter in monitoring and ensuring the quality, value and vase life or shelf life of fresh-cut flowers. Our payoff: 'Happy customers, profitable supply chains!'. We spoke to FlowerWatch's Jeroen van der Hulst about this complex undertaking.

ABOUT FLOWERWATCH'S MISSION:

"Our mission was and is being a leader in research, technology and education in cold chain flower transportation so that flowers will look their best at the end of the supply chain. Our customers have adapted to that mission. Our output appears to be not only better quality, but also more efficient logistically.

ABOUT THE IMPACT OF TECHNICAL DEVELOPMENTS:

We learn from old and new research. With our partners Bextor and Upande we recently launched the first LORA-WAN network in Kenya, an 'internet of things' technology, offering new opportunities for monitoring supply chains. Surprisingly, it's not the ideas of the internet that held us back, but the 'things,' the sensors.

Another technology, the Watch-itT label helps clients monitor their cool chain better, which in the end helps to improve it. These systems make Kenya state-of-the-art in cool chain technology.

Thesis: "An insight throughout the cold chain is lacking, savings early on, can lead to waste or extra cost further down the chain"

DEGREE HOURS:

Consumers worldwide ask for a long vase life of flowers, no matter where they come from. In order to predict that vase life, FlowerWatch uses the concept of degree hours, the average temperature of fresh flowers multiplied by the number of hours they're under way (1 degree hour = 1 hour x 1°). Every 500 degree hours reduces vase life by one day. The industry benchmark is a cool chain in which there is no more than a one day loss of vase life. But many chains don't reach that objective thus ruining the value of shipments.

FlowerWatch helps with calculating temperatures, identifying mistakes and creating cost-effective solutions.

ABOUT THE INTEGRAL CHAIN.

"A good cool chain start at the breeder's, development of botrytis resistant cultivars that are suitable for long distance cool chain transport as consumers grow pickier and flower transports tend to go worldwide.

We would like to work together with breeders on improving their assortment. We also want to improve the growers' level of knowledge, especially in understanding the 'supply chain characteristics' of the varieties they choose to grow. When we optimize the chain, three-week bouquets are no longer a dream."



Let quality speak for itself

There's something intriguing about Dutch rose growers Meijer Roses. They never give interviews and seem to be somewhat reclusive, hidden from view in greenhouses in their native Pijnacker. And yet their Avalanche roses make every celebrity party and royal wedding around the world shine.

Actually, Meijer Roses and royalty have something in common. It's not easy to define but it has something to do with the fact that both maintain a certain mystery. Meijer Roses wins multiple gold medals and awards but little is known about the owners and their nurseries.

Meanwhile, the company is, without a doubt, among one of the country's most consistent quality Avalanche rose producers. Meijer's output remains unmatched in both variety and consistent quality.

DEDICATION AND PASSION

The owner told FCI that what he and his team set out to create with their Avalanche is a rose that reflects dedication and passion. He added that 'customer-driven' means more than just talking to customers and giving them what they want. It means developing relationships with customers to determine their needs. The folks at Meijer Roses stress it is completely useless to join the group of self-congratulatory people who overanalyse their great service and premium quality. Self-promotion can counteract the kind of credibility that comes from customer testimonials and stories, they said.



“we are not getting bigger, we are getting better.”

Erik Wassenaar
Royal FloraHolland rose auctioneer

STRONG BRAND NAME

FCI put things to the test and asked Royal FloraHolland rose auctioneer Erik Wassenaar about Meijer.

“Meijer is a quintessential family business that subscribes to the adage: we are not getting bigger, we are getting better. They are not happy with anything less than a perfect, top quality rose. The folks at Meijer give their rose crop time to grow. Thanks to their consistent quality and service, their family name has become a strong brand name. The Meijers are quiet, unfussy people, open to any request from customers on the sole condition that there be no compromise to quality. They are always keen on innovation and quality improvement.”

‘CLIENTS GO WILD FOR THEM’

Luxury florist Neill Strain from London said, “Our Belgravia residents demand the highest quality products. For flowers, they want not only the finest and rarest blooms but also ultimate freshness. My relationship with the breeders and growers allows me access to these flowers and to guarantee freshness. The flowers I order are specially selected for me, picked and sent directly to the boutique so they arrive within 24 hours of picking.

We collaborated with John Meijer for our Celebration of the Rose event during the Chelsea Flower Show in 2015. I visited the Meijer greenhouse before the event and was most impressed by the technology, growing process and John’s passion and dedication to creating the very finest Avalanche Roses in the world. John has an entrepreneurial nature as I do and I like to work with innovative people. We stock his super premium 90 cm roses year-round and they are exceptional. Our clients go wild for them!”

“Quality is everything!
We wanted a natural agent”

Adrie van Dun

Managing director, Topbuxus





Buxus grower meets market demand

Introducing natural fungicide

Buxus grower Adrie van Dun from Topbuxus (Strijbeek) is a natural person in heart and soul. He's been working in horticulture for 30 years and has never regretted one day of his career. Now he is the largest buxus grower in the Netherlands.

And as a visionary with an eye on the future, he has introduced a natural agent on the market that can prevent fungal infections, the worst plague. With this effervescent tablet, the quality of the buxus improves considerably.

In 1987 Adrie started a buxus nursery covering 2 ha (it has since grown to 50 ha). Innovation is a constantly recurring theme in his career. "We quickly introduced a uniform plant on the market, with thicker branches. Our emphasis on three years of cultivation before marketing distinguished us from the rest of the growers, who cultivated for two years," explained Adrie.

LARGE CUSTOMER BASE

It was definitely an exciting choice because he was the only grower in the Netherlands who thought of doing that. "We did not survey the market to see whether it was a promising possibility, and it was of course a large investment because of the extra year of cultivation. In the first year we sold 50,000 plants and within five years we reached 5 million plants. There was so much demand, our customer base just kept growing."

QUALITY IS EVERYTHING

How did Adrie come up with the idea of marketing a natural fungicide for buxus? "In 2008 the crisis in buxus was advancing as more and more fungal infections were appearing. This really dented our image. There was widespread panic that the buxus would rot away. I wanted to help out, so I took the plunge and started working on a product for consumers that would keep the buxus healthy. Quality is everything! No artificial pesticide but a natural agent. Together with Wageningen University we created this agent, a fertiliser in an effervescent tablet, which was tested on several varieties of buxus." The product burns the fungal spores with water. After two weeks the result is evident. "It's like sparkling water," joked Adrie.

AVAILABLE FROM GARDEN CENTRES AND RETAIL

The target group for the agent consists of consumers and professional gardeners in the Netherlands, Germany and the UK –Topbuxus' biggest markets. It went on sale in February 2017 at retail outlets and garden centres and this spring the agent will also be sold at the Royal FloraHolland auctions in Aalsmeer and Naaldwijk, the Netherlands.



Luxe Blooms



“there is a market for more beautiful and therefore more expensive flowers.”

Patrick Dahlson
Owner, Mayesh Wholesale Florist

Mayesh, one of the USA's leading wholesale distributors of cut flowers, has added a Luxe Blooms showcase for the cream of the ornamental crop.

Signature flowers from Holland help Mayesh to differentiate their brand. Meanwhile, the Luxe Blooms line is a way for Dutch growers to anticipate fulfillment needs and exceed the expectations of Mayesh and their customers.

American high-end florists and event planners talk a lot about Dutch flowers. But they never had a focal point to bring together the absolute best of the 'Flowers from Holland'. That is, until now. The Luxe Blooms/Flowers from Holland specialty section at the 17 Mayesh locations in the continental US offers luxury blooms that will make every day shine.

Over the years, Patrick Dahlson has developed a soft spot for Dutch flowers. “The Dutch have always produced excellent quality flowers. Lately, there has been more specialization with growers focusing on one crop that they are extremely passionate about. I believe high-end cut flowers are like wine; there is a market for more beautiful and therefore more expensive flowers.”

The Luxe Blooms display comes alive with flowers that wow. The feedback has been overwhelmingly positive. “Our clients expect us to be ahead of the curve. We bring them flowers of superior quality and the newest varieties to stoke their floral

passions. For our discerning clientele the best of the best can be a very important selling point differentiation. It gives us a competitive edge.”

Mayesh uses cross-media marketing. “We plan on creating a link on our website to the sites of the growers we are working with. It's their personal stories that help make the connections. We've also posted pictures on Facebook and Instagram in addition to some videos.”

Henriette Brinkman business developer at Royal FloraHolland stresses the ties that bind. “Mayesh indicated one of the auction-based exporters whom they wanted to involve in this experiment. The auction facilitated efforts between the growers, Mayesh and the exporter. Giving specific attention to this niche market might also encourage other exporters to broaden their market share in this US market segment.”



State of the industry

European Garden Centres

European garden centres are very important outlets for plants. So it makes sense to investigate garden centres at the European level. FCI spoke with expert Oliver Mathys from 'I green you' about developments in Germany, Holland, Britain and France.

“In Germany roughly 65 percent of all turnover consists of green products, in Holland this is only 50 percent.”

Oliver Mathys
Market expert and trendsetter,
I green you



GARDEN CENTRES AND DIY MARKETS

“Basically it’s not just garden centres,” Mathys points out. “This market consists of what is sold in garden centres and in DIY markets. Market percentages of garden centres and DIY markets differ per country. Normally garden centres will offer a wider assortment and better quality. But as a grower or exporter you could also sell quality goods to DIY markets, provided the owner or store manager wants this level of product. The assortment and the quality you sell also depends on the formula and the strictness with which this is handled. Imagine three Dutch Intratuin markets, owned by the same person. This means two stores will have store managers. How much freedom do they get to make their own decisions? How much is decided upon by the owner or the central buying department of Intratuin?”

The intensity of competition between two outlets differs per country. In Germany there’s a lot of competition between the two, in France they celebrate together during the Grain d’Or prize awards.”

HARDWARE AND SOFTWARE

It also differs per country whether garden centres focus on hardware (tools and decorative materials) or software (garden plants, potted plants and flowers). “In Germany roughly 65 percent of all turnover consists of green products, Mathys says. “In Holland this is only around 50 percent.”

GERMANY, HOLLAND, UK, FRANCE

When Mathys is asked which garden centres are the most successful, he gives us his top four. “I think German garden centres are positioned the best. In Germany the owner is involved in finances and policies concerning his shop. There are formulas, but there is also freedom to make your own decisions. Moreover, the German economy has recovered completely from the economic crisis. Meanwhile German garden centres discovered that they can use plants as USP’s. Everyone can sell garden chairs but it is a USP when you can show your customers that your quality is the best that’s for sale since you know where to buy the good stuff. The Dutch are in second place. They are

very keen on figures and cost efficiency. They’re probably too cost-driven. Maybe, for instance, it would be better to close your shop for one day and use that time to improve your employees’ knowledge. The British in third place is partly a consequence of Brexit uncertainties. These consequences can be quite big. Take for instance what happened to the Irish mushroom growers who are the main suppliers of the British market. Four big nurseries have had to close their doors already due to the weakening pound.

The French garden centres are the weakest, not being clear on how to adapt to market changes. In French garden centres service has historically been more important than price. But lately consumers tend to look at price more and the garden centres have yet to find an answer to that.”

Customer Satisfaction: Our sole goal

Royal FloraHolland tries to help the industry by investigating quality and post-harvest issues and communicate its findings. Our post-harvest consultants know the weak spots in varieties and post-harvest processes. Here's some advice for growers, transporters and traders in Holland and Africa about recent advances.

Everyone notices if a plant doesn't flower or has yellow leaves. But what happens to a plant or flower once inside your living room remains a mystery. So the question of quality is not what it is, but what should be the ultimate expectations? This question has a simple answer: quality work should either add value for the consumer or guarantee safeguards completed prior to purchase.

We know that good, continuous and equal temperatures allow flowers and plants to keep. This is vital since European consumers have specific demands of flowers and plants, such as a seven-day vase life. This affects the entire industry, from breeders to florists.

In an Austrian supermarket I saw some sad Phalaenopsis plants in-between the fruit and vegetable department. I know that most fruits and vegetables produce ethylene, which is unfavourable for the flowering of these plants. But the Austrian shopkeeper didn't know this so he and his clients were in for disappointment. Meanwhile, the Phalaenopsis growers took the initiative to research and communicate their

findings throughout the supply chain. Because of these efforts, breeders are now producing only long-lasting new varieties. The growers, together with our Quality Department, have discovered how to treat these plants during transport. So we know what to tell exporters and buyers such as the Austrian shopkeeper.

Consumers consider sustainability to be an important aspect of quality. So together with MPS we developed ProductProof, a system that clarifies what substances (fertilizers, crop protectors et cetera) were used during the growing process through residue tests. For example, take a supermarket chain ordering flowers without a particular crop protector. Until now it was difficult to guarantee the delivery of this item as stipulated. With ProductProof the industry can be transparent about these specific standards.

Together with others, Royal FloraHolland is improving the quality of flowers and plants, enabling consumers to buy them with a clear conscience and enjoy them for as long as possible. Isn't that what quality is all about?

Frits Jonk

Manager of Royal FloraHolland's
Test & Quality Centre

Read more

www.royalfloraholland.com/quality



Growth like never before

Philips GreenPower LED toplighting

LEDs offer several advantages: they improve crop quality and production and enable lighting to be used on darker days in the spring and summer. Philips GreenPower LED toplighting may be used either instead of traditional high-pressure sodium lamps (HPS) or as an energy-efficient addition to them. Rose grower Porta Nova is expecting an increase in quality in their trial-installation with LED toplighting. It also helps them reduce the radiant heat produced by the lighting system without affecting the quality and yield of the crop. LED toplighting is also suitable in situations where conventional lighting is currently not possible due to the greenhouse infrastructure.

innovation  you

For more information about
Philips Horticulture LED Solutions visit:
www.philips.com/horti

Write us an e-mail:
horti.info@philips.com

Or tweet us:
[@PhilipsHorti](https://twitter.com/PhilipsHorti)



PHILIPS

What's hot?

We would like to share some highlights of upcoming events that we think may be of interest to you.



China is an up and coming country in all walks of life. Growing prosperity creates new chances for the international floral industry. Many of these chances will be apparent at this year's Hortiflorepo IPM Shanghai.

For more information:
www.hfexpo.org



JUNE 6 – JUNE 9

Dutch Lily Days

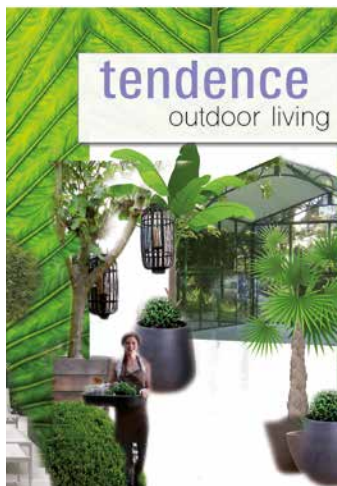
See what's up and coming in lilies, from 6–9 June Dutch lily breeders and nurseries will unite in a special event to show their new varieties. As in previous years, a new promotional lily book will be presented by the YourLily growers, showing the available assortment and floral possibilities of this lovely product.

For more information:
www.dutchlilydays.nl



JUNE 24 - JUNE 27

Outdoor Living



Outdoor Living is a new expo for garden plants and shrubs, organised by Messe Frankfurt to run parallel with Tendance a leading fair where interior decorators and garden centres buy their autumn and winter novelties. At Outdoor Living there are plenty of networking opportunities with the important decision makers in the garden plant and shrubs industry.

For more information:
www.tendance.messefrankfurt.com

JUNE 13 – JUNE 16

Flower Trials

During the Flower Trials 59 breeders in three regions in the Netherlands and Germany present their current assortment and latest innovations. Take the opportunity to see what's new in pot and bedding plants.

For more information:
www.flowertrials.nl





Where color and fragrance come together.

F1 Petunia

NEW

Evening Scentsation™ (TX794)

- Evening Scentsation is the first petunia to receive an AAS award for its lovely fragrance and stunning color
- Evening Scentsation's fragrance has notes of hyacinth, sweet honey and rose
- As its name implies, Evening Scentsation's fragrance is stronger in the evening hours, and can be experienced throughout the days as well
- Evening Scentsation is a medium-sized multiflora type, reaching a height of 5-8 inches, and a width of 30-35 inches
- Scent is perceived differently by each individual



Takii Europe B.V.
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www.takii.eu



TAKII SEED

Creating Tomorrow Today

Make better business decisions with insights



Royal FloraHolland is a known and trusted source for insights. We accumulate, create and share critical horticulture insights that enable you to make sensible and fact based business decisions

What kind of insights?

- **Country and Channel insights:** What game should you be playing? And where?
- **Data support:** Questions about pricing? We have access to Royal FloraHolland's complete database.
- **Research:** Who is the end-consumer? And what does he/she want? We conduct extensive B2B and B2C research.

And we offer a lot more, such as:

- **Storechecks:** Specialized reports that show your product at the supermarket or florist.
- **Folderchecks:** Database including all flowers and plants publications from retailers involving promotions and actions.

Got inspired? Get involved!

To learn more about our services go to www.royalfloraholland.com/insights or contact us at marktinformatie@royalfloraholland.com.



Flowering the world.