

fci

FloraCulture International

July-August 2017

Theme

Game changers

Getting together
**Big Data through
the microscope**

Up Close
**The advantages
of global warming**

Country
**Turkey:
A country
with endless
possibilities**



Practical sustainability

Kenya's approach to sustainability

Kenya Flower Council's CEO Jane Ngige

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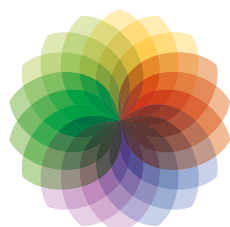
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Preface

GameChangers at FloraCulture International

Game changers. What do we mean by that word and why should you know about them? That's what this issue of FloraCulture International is mainly about. We consider game changers to be world changes that originate from major world developments in economics, science, demographics, power, etc. Since game changers tend to influence the whole world, they will influence the flower and plant industry, as well. So we think you should know about them. Therefore, in this edition of FCI we describe seven developments that we consider to be game changers. We also describe how they may influence you. Of course writing about game changers contains some predictions which we may or may not be good at. Still, we hope reading this FCI issue will give you a better understanding of what could happen and how that would influence you.

And there is more

In this issue the focus is on Asia as continent, Turkey as country and Istanbul as city. Plus a number of articles about major horticultural companies.

We hope we have created an issue with an abundance of interesting articles for you to read. Let us know what you think at: info@floracultureinternational.com

FCI Team

Columns



The power of failures

Fred van Tol

Team Manager Account
Management Royal FloraHolland
Representing international
flower growers

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Minds



Sustainability is certainly a major game changer. It's a challenge for the global industry to produce and sell flowers and plants with as little damage to the environment as possible. How are they dealing with this challenge in Kenya? We asked Jane Ngige about that. She is the CEO of the Kenya Flower Council. Another game changer lies in demographic changes and the shift of power and money from the western world to other parts of the globe. How will these changes influence the industry?

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Renowned Belgian florist Tomas de Bruyne is cheering up the lives of the rich and famous with flowers. We met him and discussed his job and the challenges he faces. So if you have something to celebrate and need some flowers to cheer up a party, Tomas is your man.



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CEO Jungle Jack's Plumerias



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Where color and fragrance come together

F1 Petunia

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The power of failures

Maybe you recognize this situation. You go to work every day, spend the evenings with your family and have some nice get-togethers with friends over the weekend. After a period of time you suddenly realize that part of your routine has changed over time without you noticing. You stopped scheduling meetings by phone. Instead you sent an invitation via text message. Instead of perusing a book with holiday pictures, you've already put a like on someone's Facebook post. When you're making a trip to another city, you no longer contact the local tourist office. Instead you book the room and search for the best restaurant on the Internet.

Although you're not always aware of it, routines change continuously. Year to year, month to month, week to week, even day to day. Can you predict what your life will be like next year? Probably not. Why? Because of the 'game changers'. Things that change lives, daily processes or even behaviour. In all honesty, you don't know when they'll come and how they will affect your life.

Game changers occur both in your professional and your personal life. Who can foresee the effects of Brexit or explain the consequences of worldwide attention to sustainability? What will the future be like without fossil fuels? These are definitely game changers. The questions remain: How do you discover them? How do you define them? How do you cope with them?

How do you prepare for your future and your company's future? How competitive will you be? How do you create the maximum benefits from forthcoming changes? I think it is a matter of being aware; about being sure that you and your management team are open to and interested in new developments. Not only developments in your industry but particularly in industries and countries that may not look too exciting right now. Start-ups might very well be places to learn from because people in start-ups are not hindered by history.

Probably the most promising way to survive the future is to create your own game changer: by investing in talented people from different disciplines and giving them the opportunity to spend time and money on creativity and innovation. And on failures, too. Albert Einstein is now considered to be a real game changer, a scientist who taught the world how to look at itself from a completely different perspective. But he failed more often than he succeeded. And in retrospect his failures were as important as his successes.

Fred van Tol

Team Manager Account Management
Royal FloraHolland Representing
international flower growers

Getting together



Big Data through a microscope

“Don't think there is time to lose. Don't think you can wait and see how Big Data will change your world.”

Frans Feldberg

Professor of Data Driven Business Innovation
at VU University, Amsterdam



You think the digital revolution is over? You're wrong. We're in the midst of it. Finding, processing, analysing and distributing Big Data digitally is changing both the world and the floral business. So says Frans Feldberg, a Professor of Data Driven Business Innovation at VU University, Amsterdam.

VOLUME, VARIETY, VELOCITY

“Big Data is about large quantities of information from various sources being processed into action-oriented insights. Dealing with these volumes, varieties and velocities requires new, high performance technologies, computers of an enormous complexity and power not only to collect, but also process and analyse this data.”

IMPROVE AND INNOVATE

“Entrepreneurs (growers and exporters, too) can use Big Data Analytics to improve their business by using sensors in their crops, for instance, to accurately predict problems and help solve them.

Big Data can also be used to innovate business models and create new services in relation to the product. Nowadays a grower isn't just a grower anymore. Wherever his products are (soil, greenhouse, cooling store, truck, ship containers), he can install sensors, thus, generating data. By combining and analysing these numerous and various data sources using computer power and sophisticated models, new ways of growing, processing, and trading can be found, but also product and service innovation. By doing so organizations will discover new insight into recently-discovered issues. So as a grower you need to know these previously unknown things before your competitor does.

When the 17th century Dutch scientist Antonie van Leeuwenhoek enhanced the magnification of the microscope lens, it enabled him to look beyond cell walls, thus discovering the existence of bacteria and other microorganisms; things we didn't know before the microscope was invented. In the end, the microscope has enabled human progress ever since. As such, Big Data Analytics is the 21st century equivalent of the microscope.”

IT'S MOVING FAST, EXTREMELY FAST

“Don't think there is time to lose. Don't think you can wait and see how Big Data will change your world. Technical

possibilities will follow Moore's law and double every 18 months. This implies exponential growth: in five years, digital possibilities will be eight times larger than they are currently. So it won't stop.”

IF I WAS A ROSE GROWER...

“If I was a grower I would stay on top of developments. The thing is that data is portable because it can be disconnected from its artefacts, like flowers or soil. You used to need a record or CD to play music. Nowadays you don't because music has become data that can travel anywhere thanks to the Internet. Combining the data of numerous MRI-scans, for instance, can give tremendous insights into human health conditions. But does the doctor who makes the scans own the data or the supplier of the MRI equipment? Ownership of data will be decisive for future business: in health care and horticulture, among others. Being a grower, I would be keen to know who owns the data. Because the insights developed using this data can determine who will be in charge in establishing and managing relationships with important associates such as customers and suppliers. If others own my data, they can gain insights into my business and, based on these insights, take an advantageous lead in many important processes, even disrupting my business. So the question becomes: is that what I want?”

COOPERATION IS VITAL

“Big Data isn't simple or cheap. Even multinational companies cannot explore every possibility and reap the benefits of being data-driven on their own. So the horticultural branch should be cooperative and create data-driven ecosystems in which many organizations join forces. Growers and traders should be aware with which business partners they can collect, process and analyse data in order to add value. Worldwide, Big Data-driven ecosystems are being incorporated into businesses.”

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Game changing hobbits

Airborne again...and if it seems like I write a disproportionate number of columns while flying, you'd be correct because it seems like those are about the only (and maybe best) occasions I get to think.

During this latest twelve hour hallucinatory episode, it occurred to me that California's horticultural industry resembles the lifestyle of the hobbits of Middle Earth. No, we haven't all shrunk and grown funny ears or hair on our feet (at least not most of us). But yes, we all tend to do the same things, over and over again...and then once more. And yes, this worked out well enough for the hobbits, at least until Bilbo stumbled onto the ring.

The ring (or actually Bilbo finding it) was a true game changer for the Shire. In California, we've stumbled through droughts, economic downturns, and changes in both consumers and their tastes. None of these really forced us to change the basic fundamentals of running our businesses. Until our own game changer arrived, our own state government. In one fell swoop, with raising the minimum wage to \$15.00/hour, they presented us an uncontrollable external factor, a 50% increase in agriculture's largest cost sector – labor. Game changer, really? Can't we just raise prices? Can't we...?

The only teeny tiny problem is: California is not an island in the middle of the Pacific. Like the Shire, we're connected to the rest of Middle Earth, or more importantly, Florida. Despite the fact that Floridians are allowed to carry concealed guns, the state also does have saner economic policies. Florida's minimum wage was already less than California's, and that differential will only increase. They can grow most things we grow in Southern California, and faster. Our best protection now is transportation costs, but that won't last and the

California Department of Food & Agriculture can only be protectionist to a certain degree.

That leaves growers with limited options.

A. increase prices (feasible to a certain extent, fatal beyond that). B. reduce costs substantially. Automation, being the best answer, has its limitations in field container growing and high capital costs put this within the reach of only very deep-pocketed growers. C. innovate to add value... this is really kind of the best option because we already do that just to maintain, much less add to a significant degree. D. migration, move some/all operations to – guess where? – Florida. Unlike cut flower producers growers can't easily push off-shore due to USDA import restrictions on soil, etc. E. retire and liquidate and avoid the problem.

Based on my observations, options D and E are winning. Many smart growers are looking for real estate and/or partners in Florida to transfer growing operations. Older growers throw in the towel completely, and rapidly. I hope I'm not being overly pessimistic but this is just basic economics. Thanks to California's self-inflicted game changer the future for agriculture in general and California's horticultural industry in particular may end up making the rape of the Shire look like a walk in the park.

Ah, can only wish I were an elf, sailing away under a cloud of silken sails into a mysterious mist. Preferably in business class.

About the writer...

John Ingwersen graduated with a degree in marketing from Georgetown University in 1990 and founded Jungle Jack's, Inc. in 1995.



Greening the city

Urban green spaces are gaining in popularity. People are realising there is more to life than steel and concrete. They try to brighten up a city by greening it. London landscape architect Nilufer Danis, born in Turkey and awarded several times for her creations, says the world needs greener cities.

WHY?

“Because of global warming, Arctic ice is melting at a record pace and since we live in a world of steel and concrete, much-needed rainwater continually evaporates which renders it useless. Cities need trees and shrubs to cool the air and reduce the urban heat island effect (UHI) which causes global warming. In urban areas the average temperatures are higher than in rural areas because cities lack an abundance of green areas and permeable surfaces. Green cities help solve this phenomenon and combat global warming. Additionally, green means more oxygen, less air pollution and healthy living present and future.”

HOW?

“Planting mature trees with large leaves is part of the solution. But we also need green roofs that lessen the urban heat island effect as well as capture particulates and pollutants in the air, and produce oxygen as trees do. We need rain gardens and permeable surfaces to catch the water in the cities to prevent flooding and storm-water runoff. As a landscape architect my job is also to help people come to their senses by informing them why we desperately need greener cities, by challenging them to invest in their cities and by developing government rules and regulations that stimulate greener cities. Some communities have already started this, but many have yet to follow suit. Landscape architects and growers of trees and shrubs have special tasks in greening the cities.

It is our job as landscape architects to point out the possibilities to planners, developers and architects and to emphasize that creating a green environment is not only more sustainable than building a world of concrete and steel, but it is also much cheaper. Growers should help us and other designers by sharing their knowledge of plants and trees. What trees are the most effective for lessening air pollution and combatting UHI? What shrubs are best for a rain garden? If we want to create a greener world, cooperation is the keyword.”

“To create a greener world, cooperation is the keyword”

Nilufer Danis

London landscape architect





More than beautiful

Flowers and plants are beautiful. People buy them to cheer up, to make life more colourful or to be green. Some plants even clean the air you're breathing. But that's about it. Or is there more?

Yes, there is more. Some flowers contain ingredients that can be extracted and used by the pharmaceutical or cosmetic industries. A striking example is found in Daffodils. They contain galantamine, found in medication to combat Alzheimer's disease. This is but one of many examples. The use of flowers in the cosmetic industry has a long and storied history. In order to create new opportunities for the industry, a number of growers/breeders of food and plants have joined forces with Wageningen

University. One of these opportunities is the production of plant ingredients for medications, fragrances, dyes and seasonings. The challenge of bringing this to fruition lies in finding the optimal climate conditions to raise these plants and discovering additional promising crops.

LEAVING CHEMICAL PRODUCTION

It makes sense to use ingredients that are natural to ornamental plants in medicines and cosmetics. For over one hundred years, the development of new medicines and cosmetics has often entailed the use of chemical ingredients and methods. In a sustainable world this is increasingly less viable. Consumers now ask for 'cleaner' medicines and cosmetics. Using ornamental plants for ingredients is relatively new so there is much to unearth. New partnerships of commercial horticultural firms, research institutes and producers of pharmaceuticals and cosmetics are

on the rise because they all see game-changing opportunities.

CHANCES FOR PRODUCERS

As we speak, Daffodils are being produced for the extraction of galantamine. There is an increasing body of knowledge being built up about this process. It is only a matter of time before there will be substantial production of certain flowers, not for their beauty but for their ingredients. This would create opportunities worldwide because if the flower or bulb isn't the main goal of growing Daffodils, you could probably do this anywhere in the world.

It goes without saying that this production will have to follow strict regulations. Using chemical pesticides, for instance, is likely to be forbidden. And if you do business with pharmaceutical and cosmetic companies, a steady supply will be vital. Having said that, growing plants for their ingredients sure might have a future.

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Asian challenges

“China has huge potential and markets develop quickly.”

Guido de Wit
Programme Director
Royal FloraHolland



In Southeast Asia (particularly China) a growing sector of the population is seeing increasing prosperity and economic opportunity. This also holds true for the floral industry. Guido de Wit is Programme Director for Royal FloraHolland's strategic activities in China. We asked him how he views new opportunity in China.

What opportunities are there?

“Consumers are able to spend more money than their parents could, creating new market opportunities, especially in China where markets develop rapidly. Young, prosperous urbanites seek to revitalize their lifestyle. They are highly reliant on the Internet, more than anywhere else in the world, specifically in their use of smartphones. To scope out the digital future, go to China.

China has always been a gift market, especially for flowers like large bud roses. There are gift occasions every month. New special gift days (Valentine's Day, I-love-you-day) have gained popularity at a quick pace. These youngsters have started buying flowers for themselves. Thanks to floral subscriptions available on their smartphones, they buy fresh flowers every week. Roses, summer flowers and Proteas are popular but the Chinese also like variety.”

What is the role of Royal FloraHolland here and what is the role of its customers?

“China has huge potential and markets develop quickly. It has specific needs because of the Chinese online presence. The market should be developed step-by-step. The demand is huge but the Chinese lack knowledge and infrastructure.

Royal FloraHolland is helping create a producer to end consumer chain. With local participants, we develop local infrastructure so the product reaches its consumers in peak quality. This goes beyond the traditional trade approach but our aim is to make this infrastructure available for our sales partners. By tackling developments together, we and our partners can develop and service a substantial part of this market.

At the moment we are developing trade flows from the Netherlands, Africa and Israel to the larger Chinese metropolises. With Chinese logistic partners we have developed depots in several parts of the country. Our trade partners have developed an assortment, suited for large Chinese e-commerce customers. We also help facilitate customers in imports and logistics, thus enlarging their market prospects. Our knowledge is used to improve the proficiency of Chinese e-commerce companies. All this is done to improve the quality level of products reaching the end consumer.”

What role is there for international producers?

“The Chinese need a wide assortment which they don't have and which is difficult to grow there. This provides excellent opportunity for producers who can grow large quantities of good

quality flowers and who have the logistical power (with the help of Royal FloraHolland, if needed) to get these flowers delivered to Chinese customers. Larger retailers entering the flower market will of course offer certain accommodations to the larger producers.”

How do the Chinese view Royal FloraHolland's activities?

For the Chinese, the Netherlands is a highly-developed flower country with a storied history. It gives us and the people we work with a high benchmark. At Chinese trade shows we get a high volume of visitors and tens of thousands of florists looking online to follow the latest trends. Chinese are hungry for knowledge and quality. They are keen on learning from us. Since local flowers are mostly of poorer quality, and better quality is less available, there are excellent prospects for imported flowers. The continuity that Royal FloraHolland can offer with its growers, chain approach and background can help entrepreneurs in the floral industry benefit from these opportunities.”



Turkish delight

Although the Western world has questions about its political stability and last year's coup attempt led to internal tensions, Turkey remains a very promising country. With 5% economic growth and 80 million relatively young well-educated inhabitants enjoying increasing wealth, it looks golden for substantial floral sales.

Turkey could also be the gateway to Eurasia, a region with increasing wealth. In order to seize this opportunity Turkey needs to build up its horticultural industry.

IMPORT DUTIES

Let's start with the bad news. Turkish import duties for flowers will hopefully decline soon, but currently they are 46.8%. For this reason, local wholesalers, retailers, florists and street vendors use mostly local products. Turkey's

floral production area is over 4600 hectares, but half of it is planted with carnations. So Turkish florists also use flowers and plants from abroad.

Turkey has flower auctions, mainly for small-scale sales to local street vendors and florists. The better florists buy from wholesalers that sell the better local products and import flowers and plants.

HIGH-END CONSUMERS, FLORISTS AND RETAILERS

Increasing wealth makes Turkish high-end consumers even more important. Rich urbanites express themselves with flowers. Top florists help them spend their money. Still, Turkish per capita spending on flowers and plants is lower than in most European countries, which then offers ample opportunities. People buy flowers and plants for their personal use or as gifts. Experts predict GDP to grow and consumers to spend more money in the near future. Retailers, mainly located in urban areas, expect continuous growth, although the knowledge level of Turkish retailers doesn't yet match European and American standards.



CHANCES

In general there is room for improvement by lowering import duties, building a good supply chain, creating added value and care and handling. Fortunately, the government is willing to invest in infrastructure, in building up a horticultural industry and in greening cities.

POLITICS

In July 2016 there was an attempt to take over power in Turkey. In April, Turkish voters gave more power to President Erdogan by a small margin. In Turkey, as in other countries, there is more nationalism and populism. But economics is also about the long term. And in the long term Turkey will be more prosperous, which means consumers can buy more flowers and plants. Despite political disputes between Turkey and some of its neighboring countries, there is nothing wrong with the economic relations between these countries. Countries like Qatar, United Arab Emirates, Kuwait, Iran, Israel and Saudi Arabia are within easy reach of Turkey. So Turkey can be the gateway to a much larger region.

Business opportunities

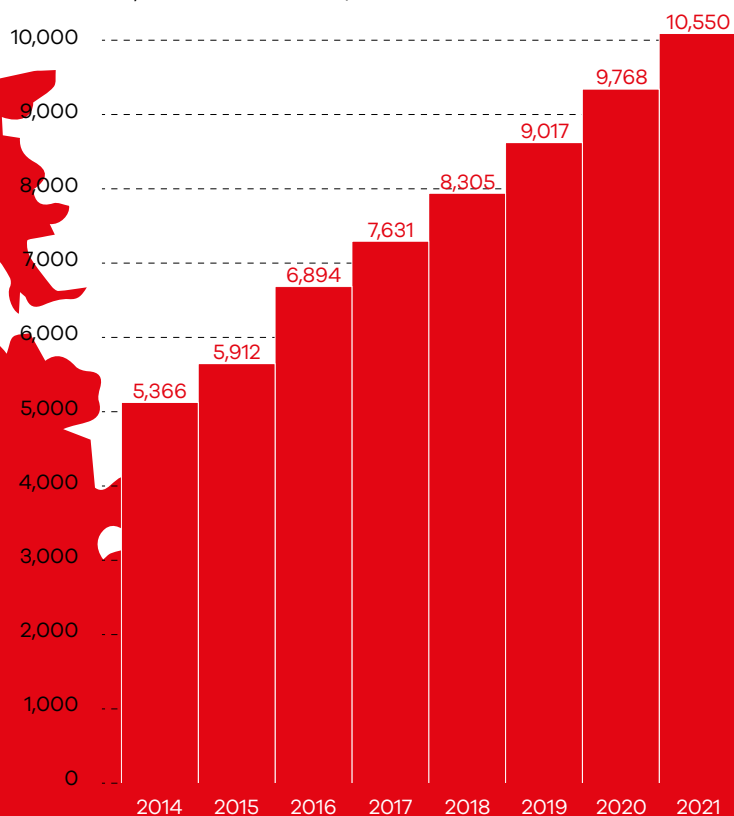
Since 2014, Royal FloraHolland has actively stimulated business opportunities in Turkey by connecting, simplifying and strengthening local horticultural framework. After analysing the situation, local business networks, infrastructures and relationships with governmental institutions were built up. Local and Dutch RFH employees work with local organisations and business people to strengthen the flower industry (production, wholesale, floristry, retail and transit business). Despite political instability and cultural differences, the expertise offered by the Dutch platform, powered by Royal FloraHolland, is highly trusted. Turkey may currently be underdeveloped in its horticultural industry, but entering the market at the ground level should pay off handsomely in the near future.

Turkey, Land of Opportunity

Turkey is a country that can effectuate enormous changes in the floral industry. It is a large country with approximately 80 million inhabitants who enjoy increasing prosperity. Most Turks are relatively young and well-educated. Growing prosperity may well lead to a growing interest in purchasing flowers and plants. Turkey could also be the gateway to many countries in the region. Royal FloraHolland is accelerating developments by helping build up the floral industry in Turkey. Most of the figures, shown on these pages come from Royal FloraHolland. For more information please visit: www.royalfloraholland.com.

Projected consumer spend/capita

2014 - 2021, in constant 2015 \$US dollars.



Turkey

- > 80 million Turks
- > Median age is 30 years
- > Turkey is the world's 18th largest economy
- > Economic growth: 5%
- > Turkish flower market = 500 million euros
- > Per capita floral spending: \$ 4,50 but increasing

Source: IGD & Royal FloraHolland

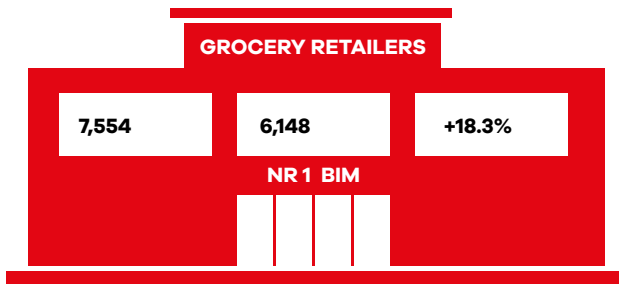
The expected retail market development in Turkey

2014 - 2021, in constant 2015 \$US dollars , percentages

2014 - 188	> 100%
2015 - 206	> 109%
2016 - 228	> 121%
2017 - 250	> 133%
2018 - 275	> 146%
2019 - 302	> 161%
2020 - 332	> 177%
2021 - 356	> 189%

Top grocery retailers

in constant 2015 \$US dollars, number of locations, percentages of change



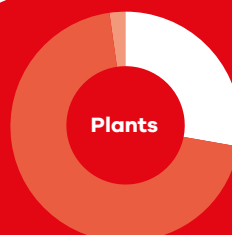
Retailer	Sales 2017	Number of stores	Change in sales 2017-2018
2 MigrosTürk	5,050	1,858	+14.1%
3 A101	4,378	7,000	+11.2%
4 Şok	2,807	5,000	+15.5%
5 Carrefour Group	1,676	555	+11.2%
6 MakroMarket AS	776	339	+12.1%
7 AdeseAS	242	174	+5.0%
8 Kazançlıistanbul Marketleri	97	86	+12.2%

For what purpose do you buy flowers and plants?

percentages



Personal gift	52%
Personal use	39%
Business use	6%
Business gift	1%
Funeral	1%



Personal gift	28%
Personal use	70%
Business use	2%



PHOTO: MEDELLIN TRAVEL

Being unique through variety

Istanbul, city on the edge of the east and the west. What does that mean when you're a florist? Mehmet Dikbas, Co-owner of Inside Flowers & Events, tells us.

With his business partner Selin Saral Mehmet Dikbas owns four flower shops in Istanbul under the name Inside Flowers & Events. His clients (like all flower buyers worldwide) are keen on being surprised and getting a good quality. So what's specific on the Istanbul market?



Tell us about yourself.

"After working in both small and large floral companies for twenty years and learning on the job, my partner Selin Saral and I founded Inside Flowers & Events. We now have four shops. In addition to our shops in two high-end shopping malls, Zorlu and Istinye Park on the European side of Istanbul, we opened up shops in Acarkent on the Asian side of Istanbul and in Bodrum, a popular tourist destination in southwest Turkey. In the ever-changing flower industry your education is never done. Business always reinvents itself. You should learn and reinvent yourself with it.

I find my inspiration in flowers and nature itself. Everything begins with nature. Art usually reflects nature. I believe flowers are an extension of nature into our daily lives. Arranging flowers hardly differs from creating a work of art. No better inspiration for a florist than nature."

What kind of people buy you flowers?

"Our clientele is very diverse. Some customers buy cut flowers weekly to liven up their homes, others order special flower arrangements for their events or a glamorous and flamboyant arrangement for

a celebration. We always try to surprise and amaze them creatively and make them happy which in turn will broaden our customer base."

What of floristry and what flowers do your clients like?

"Istanbul flower lovers enjoy variety in assortments to differentiate themselves. They like different, unique flowers which stand out. Peony and calla lilies are extremely popular these days. We do not just follow trends, we also try to set floral trends in Turkey, freely creating unique arrangements that are hard to find elsewhere. That is what differentiates us in the market. That's why our customers like us."

What about your employees?

"Our 45 employees were trained in-house about flowers and making floral arrangements. From new employees we require passion and curiosity about flowers. Our staff share the arrangements they create on a special network on which colleagues give their praise, suggestions and constructive criticism. This motivates the team."

Where do you buy your flowers?

"Most of our flowers are imported from the Netherlands through different wholesalers. Because we

value diversity in products, our orders change significantly from week to week."

How do you stay connected to modern floristry developments?

"Mainly through horticultural publications and social media. Nowadays, worldwide trends in floral arrangements are natural looking. We mix this arrangement style with Turkish cultural stylistic preferences and perspectives, thus creating a unique, Turkish style. I follow trends in different countries, not just looking at consumer tastes but also different lifestyles and socio-cultural conditions."


How about the floral future?

"In the foreseeable future, durable, natural arrangements will continue to dominate the market together with some more futuristic approaches. Inside Flowers & Events successfully expanded its operations within Turkey. We made ourselves a name. We think we can expand our business internationally and work for events in Italy and in neighbouring countries such as Turkmenistan. The quality of service we provide enables us to enlarge our customer base with our numerous international customers."

A photograph of Jane Ngige, CEO of Kenya Flower Council, smiling and holding a large bouquet of colorful roses (red, pink, yellow, and orange) in a greenhouse setting. She is wearing a grey and white striped turtleneck sweater. The background shows rows of rose bushes with green leaves and some blue vertical markers.

Kenya's approach to sustainability

Sustainable plant and flower production is vital as consumers want to purchase with a clear conscience. They want as little damage to the environment as possible and fair wages and labour conditions for the workers. How do you do that? Kenya Flower Council CEO Jane Ngige spoke to us about the Kenyan approach.



“Growers now know the importance of sustainable production.”

Jane Ngige

Kenya Flower Council CEO

WHAT HAPPENED IN THE LAST TEN YEARS?

“A lot. Growers now know the importance of sustainable production. Moreover, Kenya built highly competitive systems in regards to sustainability and social conduct. Kenya Flower Council (KFC) ratified them in a Code of Practice. Of course companies have their own responsibilities, but KFC verifies that what they do fits this Code of Practice. And we keep these systems up to date. Last year, for instance, we added a section about water, especially for our members near Lake Naivasha, to tackle local water problems. We pointed out that every nursery needs an implementation plan with targets and a timetable which we check. But the nurseries themselves develop their own water management systems. So the system is controllable and transparent.”

CV

Jane Ngige

Jane Ngige is CEO of the Kenya Flower Council (KFC) since 2004 and is also CEO of the Kenya Horticultural Council. She is a MSc. Food and Agriculture Biotechnology Graduate from Reading University and has post graduate certificates in International Food Laws (Michigan State University), Food Processing, and Systems approach to Quality Assurance & Marketing (Wageningen University). Jane Ngige represents the Kenyan flower industry in lobby and promotions. In her years in office sustainability became a cornerstone of Kenyan flower production.

TRANSPARENCY IS EXACTLY WHAT EUROPEAN AND US RETAILERS ASK, ISN'T IT?

“It sure is. Retailers put pressure on us. Their clients only want flowers that do not damage the environment or stimulate global warming and are not produced at the cost of the workers. So retailers demand reliable, transparent systems giving them these certainties. They make it very clear to us if parts of our system do not meet their demands. If so, they will tell us to make changes. Because we want to develop our Code of Practice in accordance with our stakeholders, some of them (Royal FloraHolland, for instance) are involved in maintaining it and the checks that we do.”

HOW DID KFC MEMBERS REACT TO YOUR CODE OF PRACTICE?

“It's not our Code of Practice, it's the member's Code of Practice. Being a KFC member means you have to produce under this code. But being a KFC member is voluntary. Our members pay to belong to the KFC organisation. By doing so they accept the Code of Practice. There may have been one of two members opposed to it, but almost all our members appreciate the code. Now there are some growers (members and non-members) who cannot reach the standards of the KFC Code of Practice. In accordance with our government and other stakeholders, we created a less restrictive code. If you want to export flowers from Kenya, you are obliged to fulfil the rules of this code. In recent years Kenya signed treaties with other countries, among other things concerning phytosanitary issues. Our Code of Practice has helped us tremendously in these processes, because we can prove transparently the technical and scientific validity of our methods. Sustainability is starting to be one of our USPs.”



The shifting epicenter

Better get used to it: the West isn't the center of the universe anymore. The demographic and economic epicenter has moved from Europe and the USA to Asia, Africa and Latin America. China offers many opportunities. And growing prosperity will bring changes in horticulture.

“A new middle class is developing, people with money to buy flowers regularly.”



AIPH Secretary General Tim Briercliffe sees two long-term global developments. “In developing countries a new middle class arises, people with money to buy flowers. Cultural influences will eventually decide if they make this purchase. In our International Vision Program we analyse this development. We think you can create new markets on the basis of these developments, for instance in China or India. People gaining prosperity tend to adapt to a more Western lifestyle. A vital domestic flower market in India by 2030? Who knows. We do know that everyone loves flowers, but not everyone will buy them for domestic use.

Another development is urban greening. Cities tend to green up their areas, while developing countries do so to an even greater extent than in western countries. All this brings new opportunities for the industry. But the prospects are eastward-bound. Our September Annual Congress in Taipei is no coincidence. AIPH increasingly attracts more Asian growers. We are present there in conferences and exhibitions. Western markets tend to stabilize, Asian markets tend to grow. Asian production will grow, too, but there will be niche markets bringing new opportunities for traditional European, African and Latin American production but also innovation and exports of knowledge and skills.”

“Western markets tend to stabilize, Asian markets tend to grow.”



Martin Olde Monnikhof and Nynke Runia (Dutch agricultural counsellors based in Beijing) reflect on China’s growing role on the world stage. “Their main ambition is to further develop their country, not overtake US dominance. But for historic, demographic and economic reasons they wish to be taken seriously at an international level, including competitiveness in agriculture and horticulture.

China’s major challenge is sustainable prosperity. This is what the population asks of the government. So there’s lots of attention on alternative energy sources and clean water.

Doing business is different in China. You need a reliable local partner. If he is not okay, the project will fail. You also need good market and transport strategies. Then there’s the government and the Party, who are omnipresent in China. There is a Party secretary in any company of some substance. The government is responsible for market access. Good contacts with national, local and provincial authorities are of great importance. If the government is on your side it can be of great benefit; if not, you have a problem.

Chinese culture differs from any other culture. There’s the language barrier and there are different ways of negotiating. Chinese are less transparent, tending to negotiate till the moment you deliver the product. Therefore, it takes time to do business. But when you are in business, the possibilities are endless. China needs to think big and do so in the floral business, too. Yes, we do see market potential. Of course China will develop its own production areas (in which foreign growers may play a role). In niche markets, foreign flowers and plants have their place. A new middle class is developing, people with money to buy flowers regularly. Although their opinions on flowers and plants may differ from ours, they sure do love them.”

Up close



Danziger, a short story on innovation

Making people happy, dreaming big, accumulating knowledge and inspiring people all begin with intensive research.



A picture is worth a thousand words and here's a picture of Ernst and Zehava Danziger to prove it. Taken in the Fifties, a young, bright couple appear to be full of dreams. Being the founders of Danziger, they sure had dreams. And since then many of those dreams have come true.

Today Danziger operates worldwide from its offices and production sites in Israel, Kenya, Guatemala, Colombia and Ecuador. Its activities include breeding, producing and marketing of cut flowers, annuals and perennials. Danziger holds a strong position in Gypsophila, Solidago, Coreopsis, Bidens, Petunia and Lobelia. It has over a thousand customers in over sixty countries and offers over 360 varieties of a wide range of cultivars. Its R&D department alone has over one hundred employees.

But these are all figures. Danziger is also about innovation, creativeness, imagination and being extraordinary. It's also about making people happy, about dreaming big, about accumulating knowledge and inspiring people.

INNOVATING PRODUCTS

Danziger's four key values revolve around innovation. Not only product innovation, but also production and marketing innovations. In 1997, the introduction of Gypsophila Million Stars® was revolutionary. Nowadays most of the Gypsophila grown worldwide is of Danziger Gypsophila varieties.

A more recent example is the Petunia AMORE™ Series. These Petunias have beautiful flowers with heart-shaped petals so they bring love and friendship to any garden. Moreover, Danziger created a marketing plan when introducing the new series. They were visible at numerous exhibitions and a special promotional kit was developed for further support. On top of that, special packaging was developed to highlight the special Petunia Amore brand.

This is how Danziger defines making people happy: creating a strong and distinctive product with the tools to implement it successfully to make growers, wholesalers, retailers and consumers happy.

INTENSIVE RESEARCH

Making people happy, dreaming big, accumulating knowledge and inspiring people all begin with intensive research. Danziger has dozens of R&D employees working on breeding, product research, clean stock materials and propagation of in vitro materials. The R&D process works under strict protocols and conducts professional trials in several facilities located in various climatic zones. Neutral trials are carried out by request from Danziger to underscore its claims.

You could say the wide range of Danziger products are the result of this research, of experience, of good contacts in the industry, of ingenuity and hard work. You could also see it as the result of the dream Ernst and Zehava had when they started the company. Whatever your opinion, it's a fact that this very successful Israeli company has become one of the world's leading breeders in the floral industry.

Takii: Tradition Meets Innovation

“Yes, we are a Japanese family-owned company founded 182 years ago but in our breeding activities traditional breeding values combine with ultra-modern techniques,” says Ton Kuipers, Managing Director of Takii Europe. “There is growth and, therefore, we’ve had a recent reshuffle of activities.”

Takii is a Japanese breeder with locations worldwide specialising in breeding and the production of seeds. “Our products are seeds for flowers and vegetables,” says Kuipers. “Because of our size (1200 employees worldwide) we

can be part of strategic partnerships using cutting-edge breeding and propagating techniques. But there is still a lot of traditional craftsmanship within our company.”

GROWTH STRATEGY

One of Takii’s locations is in De Kwakel, Netherlands, near Aalsmeer in the heartland of Dutch floristry. Kuipers: “We started there in 1990. Now we’re working on an important goal in Takii’s growth strategy. It focusses on a limited number of interesting crops with which the company aims for a top three position.

Takii has a foothold in Japan and elsewhere in South East Asia. This is what you would call stable growth, slow but steady. Accelerated growth can be achieved in Europe, Africa and the Middle East. That’s where we come

in. Since May 1 our job is to take care of African and Middle East interests in addition to our European business. One of the reasons to do this is the time difference with Japan. In these regions it is more convenient to do business in Europe. Moreover, in Holland we have closer ties to African and Middle East horticulture. And, of course, Takii has products of interest for these regions.”

PACKAGING LINE

One of the investments made in the De Kwakel location is a new packaging line. European growers are used to receiving their seeds in foil packaging. But in Africa and the Middle East storage conditions are not always optimal so growers there like their seeds to be delivered in cans. That’s why they’ve built this packaging line, so clients can get their products as fresh as possible.

Photo: Rolf van Koppen



Ton Kuipers, Managing Director of Takii Europe, and mayor Dagmar Oudshoorn-Tinga at the official and festive opening of the new packaging line.

Listening is the main part of my job

When money is no object and you need to show the world what you're all about, floral decorating takes your event to a whole new level. Belgian floral designer Tomas de Bruyne decorates parties and events worldwide for the rich and famous. What's this trend about?

Tomas entered floristry when he fell in love with a girl whose father had a flower shop. After being educated as a florist, he and his (then) wife made a success out of their flower shop. But his international designer jobs at big events took so much time that he withdrew from the shop to concentrate on his other tasks.

KNOWING YOUR CLIENT

Where do you begin planning a large scale event? "By communicating and listening to my client. Who is he? What does he want to tell the world? Who's the audience? By listening I find keywords for my job. Then feelings, concepts, constructions, colours and shapes occur. Flowers come later. If the keywords are 'show' and 'grandeur,' it has to be big in vibrant colours. But you can also emphasize things or give them excitement by detailing shapes, forms, lines, density, textures, colours, etc. It is like stopping to look in a shop window. You only stop when there's something exciting to be seen and your soul is stirred."

A TEAM OF PARTNERS

Creating floral decorations of this magnitude requires teamwork. Basically, Tomas is the architect of the team. "I develop the concept and ideas to meet the expectations of my clients. I design the constructions necessary to carry the floral decorations. If possible these constructions are made locally (in India, China, etc.). Through the years I've built up good partnerships with many local event companies and vendors worldwide. Since nothing may go wrong, trust, craftsmanship and commitment are important key values."

THE USE OF FLOWERS

Numerous flowers are used in these type of decorations; over 100,000 flowers are now the norm. Once Tomas even used 700,000 flowers. "Where I source them from depends on the budget and my client's wishes. Sometimes I mainly use local products, but if it is very specific I buy at Dutch exporters DGI. They deliver superior quality in large quantities and know exactly where to find specific varieties

"I develop the concept and ideas to meet the expectations of my clients."

Tomas de Bruyne



and colours. They help me by sending the flowers as efficiently as possible. On the job I am assisted by highly professional florists, both local and my own team. I also try to be in contact with the growers whose flowers I use. I admire their passion and creativity in constantly improving their product."

The advantages of global warming

Although Trumpists will disagree, most people think global warming is a threat to Earth. But even a threat presents opportunities. Matt Strugnell knows how those opportunities could affect sparkling wine.



“Likely climate change is helping us, but so are our skills and experience.”

Matt Strugnell

Vineyard manager at
Ridgeview Estate Winery



Matt is the vineyard manager at Ridgeview Estate Winery in Ditchling in Southern England. Ridgeview was founded in 1995 by Mike and Chris Roberts. Mike's dream was to change the perception of English wines by producing sparkling wines to rival the best international ones. He fulfilled that dream. Numerous prizes and awards bear witness to that. Mike passed away in 2014 but Ridgeview is still a family business, led by the next generation.

Matt, who joined Ridgeview in 2002, had a horticultural education but also learned on the job. “I worked in this vineyard for fifteen years so I know every spot of it. The coldest spot and the most infectious one. But also the best spot in terms of production. Our vineyard measures 5.5 hectares and there are a number of vintners growing grapes on a long-term contract basis. Although we exchange knowledge, you still have to work with them extensively.”

“Climate change seems to help us but since our weather is unpredictable, growing grapes here remains difficult. Although this lacks scientific proof, our winters seem to be warmer and wetter. Summers, being a bit warmer, favour growth. The growing season starts a bit earlier which gives the grapes more time to mature and accumulate sugar. Thus, we can harvest earlier with less chance of rotting. The flip side to this is that Spring frost can ruin your crop overnight and this is increasingly a problem. This year our vines budded two weeks

earlier than usual, but in April we experienced some very cold night-time temperatures. We use special candles and electric wires to raise temperatures enough to keep the plants frost-free. All it takes is raising the ambient temperature 1.5°C, but this has to be done in an open field. Good grapes have an optimal sugar/acidity level. Both are needed for good taste, but too much sugar means the wine will contain too much alcohol. Getting enough sugar in the grapes used to be a struggle, but nowadays we focus on getting the right mix of sugar and acidity.”

“Likely climate change is helping us, but so are our skills and experience. Even when it would rain for a long time in the summer, we would get a good crop. Attention is the key to successful growing. Of course you need theoretical knowledge, but you develop your intuition through experience. Sometimes you act on a hunch, that only later you can support with fact. Last weekend the weather was damp and warm. The first thing I did Monday morning was walk around the vineyard visiting probable weak spots. The strength of the Ridgeview team is in its openness. All 25 employees are informed on a regular basis about the well-being of the company. People from all parts of the company meet at work or lunch. Everyone knows that it takes grapes to make wine. But it also takes winemakers, people to put the label on the bottle and someone to send the bill to the customer after delivery. It's all about teamwork.”



Doing digital or being digital?

Digitalisation and the Internet have changed retail sales enormously and further changes will occur according to Cor Molenaar. As a professor of e-marketing he studies the influence of the Internet on buying behaviour at Rotterdam Erasmus University.

HOW ABOUT THE HISTORY OF DIGITALISATION?

"In digitalisation there are waves. The first wave included automating company processes, for example shops with cash registers and barcodes. Since 2000, people have used the Internet more frequently for information and to buy goods. The rise of the iPhone and Facebook accelerated this development. The Internet became a daily routine for millions of people leading to more transparency, more communication and more Internet sales. The next wave is creating platforms on which a product manifests itself, which will accelerate in 2019, renewing culture, processes, relations, retail, etc. People buy Nike's at Alibaba, because at Alibaba Nike manifests itself. AirBnB only facilitates house rentals. So why go to a bank if you can secure a loan from a private entity on the Internet?"

HOW ABOUT THE FLORAL INDUSTRY?

"Until now, companies were 'doing digital' instead of 'being digital'. Doing digital means monitoring processes and improving digitally. Being digital means building a business model, based on digital achievements. Growers are doing digital in their growing process when influencing humidity in their greenhouses. They could be digital using the Internet of things to create new trade changes. Why must fresh products be sold by

supermarkets? Why can't growers do so themselves? Why do breeders base most of their activities on the input of growers, wholesalers and florists instead of digitally approaching consumers? Why doesn't every rose carry a chip so the grower knows when his flowers end up in the garbage and can react to that. Being digital is about your added value in this process of changes. The Internet enables you to be proactive.

As in other industries, unnecessary parts of the floral chain will disappear. This displacement, by the way, is a major cause of current low inflation rates. Banks, for instance, have shiploads of offices and managers and a matching cost level. Their new digital competitors have no offices and managers, thus operating much cheaper.

Being digital means being approachable, flexible and transparent. It means fishing where there's fish, at Alibaba or Amazon. Yes, they can sell fresh flowers when you help them to. Yes, they will ask money for that, but only if they sell your flowers. And they will reach more consumers than you can imagine."

SO IF YOU WERE A GROWER...?

"... I would start a platform on which anyone could hitch on. But remember this: per each unique market there is only room for one or two platforms. Only when you can unite buyers and

sellers will you survive. If you cannot be a good front runner, you'd better be a good follower. And if you start a platform, act like a start-up. Being digital means creating a company that acts digitally, without buildings, trucks or people. The more flexible, the better. In fact, you don't even need a greenhouse."

“If you start a platform, act like a start-up.”

Cor Molenaar
Professor e-marketing
Erasmus University



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The limitations of the Lions Club

This issue of FloraCulture International was full of game changers. I truly hope they inspired you to create and expand your business. Thinking about game changers, I wondered what mental attitude it takes to discover them at a time when they can be advantageous.

In the Middle Ages, China was more advanced than Europe. It wasn't the Europeans who invented gun powder or book printing, the Chinese did. The Europeans only reinvented them. But when they did, both gunpowder and book printing were used by the general populace, whilst in China using gunpowder or printed paper was the emperor's prerogative. The relative openness of Europe's medieval society led to a fast dissemination of knowledge and skills. So when Europe started to conquer the world in the late Middle Ages, they had the skills and self-confidence to do so. Although I don't intend to eulogize European history, it is notable to see the consequences of an open and ever-changing society.

So what is my message after having described seven probable game changers for the floral industry? Perhaps it is that we cannot survive without being open to new ideas. Of course you should listen to the news and read the newspaper, but most likely you won't find game changers in

the Ladies Home Journal or some nerdy Internet site. They are more likely to be found on the street, in shops, or online stores or platforms. In other words, look for them where you least expect them.

Another question is who will discover these game changers. Of course in your organisation R&D has an established place. But perhaps your cleaning person is best equipped to discover game changers that are relevant to you. Who knows? I don't advise you to start day to day talks with your cleaners, but I do advise you not to neglect anyone. For game changers are developments you don't expect.

Final conclusion. Game changers are found where you don't expect them at times you don't expect them by people that likely weren't educated to find them. So if there's one thing you need, it's an open mind and a good relationship with society as a whole. Networking in the Lions Club is not enough. Listening, really listening to people should be more helpful.

Piet Kralt

Piet Kralt is an independent Dutch journalist and interim Editor of FloraCulture International.

What's hot?

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



SEPTEMBER 12 – SEPTEMBER 14

FlowersExpo Moscow

Russia remains a market of enormous importance for the global floral industry. Therefore, FlowersExpo is an important exhibition. FlowersExpo will be held in the Moscow Crocus Expo where Russian and foreign exhibitors from the floral world will showcase their products and meet clients.

During the exhibition, seminars, conferences, round table talks and competitions will be held, thus giving visitors an even better look at current and future opportunities in Russia.

See also:
www.flowersexpo.ru



OCTOBER 4– OCTOBER 6

Proflora Bogotá

Colombia, being one of the world's largest cut flower producers, welcomes the world at Proflora in Bogotá from October 4–6. Come see what Colombia has to offer. It is also an opportunity to enjoy Colombian life as Proflora's closing party is

known to be great fun. The exhibitor's list is a long one containing a wide array of growers, traders and suppliers. Be sure to be there.

See also:
www.proflora.org.co

SEPTEMBER 21 – SEPTEMBER 23

Flormart Padua

Flormart is an international exhibition of horticulture, landscape architecture and green infrastructures held in the ancient Italian city of Padua. Italy remains important in the global horticultural industry being an important producer of

flowers, plants and trees, but also because of the special Italian art of design. See what makes Italy special and view international horticulture in Padua on September 21–23.

See also:
www.flormart.it



Colophon

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FCI team

Katja Bouwmeester (Editor in Chief), Piet Kralt (Editor), Rianne Nieuwenhuize (Editor), Angie Duffree (Traffic & Sales) and a number of highly talented journalists and photographers.

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