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NOVEMBER - DECEMBER 2018

GREENHOUSE DESIGN

**Perfection is a
never-ending quest**

XYLELLA FASTIDIOSA

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AFRICA

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17 years of Poinsettia campaigning



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Few floriculture crops have flooded the global marketplace like Poinsettias the last few decades, with millions of plants being produced for the holiday season annually. Not bad for a plant that only grew wild before it was tamed by German breeders in the 1950s. Despite its exceptional beauty and versatility, Poinsettia suffers from price challenges. Production costs are relatively high, the margins tiny and growers increasingly face difficulties with pests and diseases. For over 17 years now, the EU Stars for Europe campaign has helped the industry drive sales by providing point of sale materials for retailers and generate free publicity and PR for the industry. Page 20.

Poinsettia but also bedding plant growers in Europe typically buy their unrooted cuttings from a supplier with offshore production in Africa. Take Florensis Kenya. The company celebrated its 20th anniversary this October and to mark the occasion, the company's staff enjoyed a cocktail party. One day before the gala dinner in Naivasha, the Hamer family kicked off construction of a state-of-the-art NAKT Elite greenhouse which will be used for growing premium quality cuttings. Page 18.

Global trade and climate change have led to plant pests and diseases spreading around the world in recent years. The bacterial disease Xylella fastidiosa is currently wreaking havoc in Italy's southern Apulia region. A conference at the AIPH-approved Flormart trade exhibition in September, hosted by Italy's National Association for Nursery Stock Exporters (ANVE) aimed at distinguishing fact from fiction and providing a solid, scientific overview of the situation. Page 16.

Flormart was also the locale to celebrate the 70th anniversary of AIPH, the International Association of Horticultural Producers. The organisation continues to grow in size and strength as you can read in AIPH's anniversary publication that accompanies this month's issue of FCI.

Team FloraCulture International would like to wish all of our readers a very merry festive season and a Happy New Year. Meanwhile we would like to say a huge THANK YOU to each and every one of our 103,000 readers from all over the world for all of your support and collaboration throughout 2018. We look forward to connecting thousands more readers in 2019!

Ron van der Ploeg



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FloraCulture International is an independent trade magazine with the largest circulation for a world publication of its kind. FloraCulture International is published for the ornamental horticulture industry by the International Association of Horticultural Producers (AIPH). It's published six times per year worldwide. **Editorial Team:** Tim Briercliffe, Alicja Cecot, Audrey Gerber, Jan Dieter Bruns, Hidde Koenraad, Richard Melnick, Ron van der Ploeg, Kim van Rijssen, John Sutton, Penelope Tomkins, Amy Winder **Contact:** info@floracultureinternational.com. **Address:** FloraCulture International, Horticulture House, Chilton, Didcot, Oxfordshire OX11 0RN, United Kingdom. **Worldwide Advertising Office:** Angie Duffree, angie@floracultureinternational.com tel. 0031 (0)6 403 277 35 **Printer:** Drukkerij van Deventer **Graphic design:** Aryen Bouwmeester. **Circulation Administration:** FBW Abonneservice, Postbus 612, 3440 AP Woerden, The Netherlands. **Subscribe:** Sign up now for a free digital subscription www.floracultureinternational.com / subscribe **Publisher:** Published by AIPH ©2018 FloraCulture International magazine. All rights reserved. Publisher is not liable for the content of the advertisements. Photography by permission of copyright owners.

FRANCE



A tough first half for the French garden centre industry

FNMJ (Fédération Nationale des Métiers de la Jardinerie), representing the leading garden centres in France, reported the country's overall garden centre sales for the first half of the year 1% down.

The industry body reported a decline of sales of 23% in March due to torrential rain, with few garden centres claiming to have caught up with the spring losses. Early summer provided some relief, with sales figures up 12% and 1.5% in May and June respectively. Performance varies across regions, with only the South East of France reporting an area of limited (1%) growth. Flowering and foliage houseplants and décor products registered growth of 10 and 1% respectively, while garden tools, gardening equipment, lawn care, plant food and compost remained down at 8, 4 and 2%.

NETHERLANDS

The best and brightest in Pro Manager Floriculture master class

Jungle Talks launched a brand new master class this November in collaboration with a number of horticultural companies from the Netherlands. Sixteen of the world's best flower farmers, aged 25-40, participated in this unique educational opportunity in the Netherlands October 28 - November 10, 2018.

Speaking about the new initiative, Jungle Talks' Ed Smit said: "All participants will fulfil different management /board of director roles in the near future. Candidates are highly qualified, working at leading floricultural companies around the world. Among them are entrepreneurs who are already at the helm of a company. We have welcomed participants from the USA, Guatemala, Brazil, Colombia, Kenya, Uganda, Slovenia, Denmark and Vietnam." Smit went on to say that the group represented a very broad cross-section of the ornamental horticulture industry worldwide, both in terms of

geography and crop production. "On board are Phalaenopsis growers while others produce tropical houseplants, cut flowers or young plants. There was even one participant from the USA who is involved in cannabis cultivation while one of his 'fellow students' grows tobacco in Brazil." During the master class participants acquired a wealth of horticultural knowledge and experience. With Koppert Biological Systems, Ridder and Rabobank being the headline sponsors of the event, the directors of these companies invited students of the master class to discuss new business strategies and ideas.

CHINA

Netherlands, China to intensify greenhouse cooperation

Dutch and Chinese greenhouse construction businesses can expect stronger cooperation of their nations' greenhouse industries, boosted by the Jianshan Sino-Dutch Industrial Park.

Ahead of the China-Netherlands Business Forum in The Hague, Netherlands on October 16th, Dutch Greenhouse Delta and the Jianshan Sino-Dutch Industrial Park signed a cooperation agreement. A vital part of the Jianshan project is a cluster of 420 ha greenhouses which will include a state-of-the-art research and demonstration centre, a replica version of the World Horti Center in Westland, Netherlands. In a Memorandum of Understanding it is foreseen that a large portion of greenhouses will be built by Dutch greenhouse companies.

The Sino-Dutch High-Tech Agriculture Park will take shape over the coming five years. It will emerge in China's Yangtze Delta Megalopolis. Dutch Greenhouse Delta is the name that has been chosen to represent a consortium incorporating Certhon, Bom Group, Kubo and Priva and aims at strengthening the industry's global presence by realising large scale greenhouse projects in metropolitan clusters around the world. As more of the world's population resides in cities, 'city farming' can be a sustainable solution to 'feed and flower' the emerging megacities.



FRANCE

Applications for CPVR remain strong

In the first 8 months of 2018, the Angers-based Community Plant Variety Office (CPVO) received a total of 2,252 applications for Community Plant Variety Rights (CPVR) which represents an 5.8% increase to the same period of 2017.

The highest increase was observed in the agricultural sector, where 719 applications (+103; +16.7%) were received. 440 applications were filed in relation to vegetable crops (+9; +2.1 %) and 186 applications (+38; +25.7 %) concerned fruit crops. By contrast, in relation to ornamentals, which remains the biggest crop sector, the number of applications reduced to 907 (- 26; -2.8 %). More statistics are available at www.cpvo.europa.eu

UNITED KINGDOM



Preparing for 'Life After Brexit'

The UK's Chartered Institute of Horticulture (CIH) held a conference in London on October 3, 2018, themed 'Island Horticulture – Life After Brexit'. The departure of the UK and Northern Ireland from the EU, next March, is expected to deeply impact the entire horticultural industry. To address pressing Brexit concerns, the conference brought together distinguished speakers from the UK and the Netherlands.

Speaker Mr Jacob Kolff, MD of Kolff Plants in the Netherlands, discussed the future implications for imports of nursery stock to the UK. The UK industry relies heavily on importing stock from the EU as this is often sourced cheaper and quicker than from domestic growers. It is highly anticipated that Brexit will result in increased import costs of such goods due to factors relating to transport costs, exchange rates and import taxes. Speaking on how the UK can prepare for the impact, Mr Kolff urged the UK industry to build the resilience necessary to fulfil demand at home. This resilience must factor in the further challenges Brexit poses to the UK market, not least of all - labour shortages. In the current Brexit climate, foreign workers feel less welcome in the UK and face greater restrictions on entering and staying. Graham Spencer, Director of Plants for Europe (an independent plant breeders' agent) focused his talk on imports, plant health and ongoing economic and regulatory uncertainty. Whilst EU plant passports are likely to remain during transition, new EU legislation will be implemented in November 2019 requiring plant passports for all materials and all operators to be registered. After December 31, 2020, there will be inspections and phytosanitary certification for international shipments. Mr Spencer anticipates the regulatory environment will be tougher and plant health regimes more difficult post Brexit. He also cited research from The Centre of

Transport Studies at Imperial College, London which found an extra two minutes spent on scanning each vehicle at UK borders in Kent could triple existing queues on some of the UK's motorways. At peak times this could amount to five hours of traffic delays. With higher potential for delays at docks, due to extra checks and tighter rules on Xylella fastidiosa hosts and Oak Processionary Moth hosts, the increased cost and administration burden could affect everyone. Mr Spencer recommends that every organisation dedicates a senior member of staff to the role of monitoring and planning for the effects of Brexit. Organisations should, he said, be up to speed with regulatory changes and consider the costs - direct and indirect. He also urged organisations to speak to the APHA* as part of their efforts to prepare for new plant health regulations and check their compliance capabilities. Lastly, organisations should consider their supply chains, even those not importing should know where their suppliers have purchased young plants. In the event of a 'no deal' scenario, the UK government has released several technical bulletins covering the trade of plants post-Brexit. The notices relate to trade with the EU (imports and exports), VAT, workplace rights and farm payments. These bulletins can be found at www.gov.uk. Information can also be accessed via www.hta.org.uk *APHA – Animal & Plant Health Agency



URBAN GREEN SPACES ARE A FUNDAMENTAL RIGHT

Fourth generation Jan-Dieter Bruns is CEO of one of Germany's leading plant nurseries Bruns Pflanzen.

Many Germans will remember the summer of 2018 for what it was: a never-ending summer, a constant blazing heat – and a daily quest to find trees, pergolas and arbors as the perfect shade saviours.

And yet, the green spaces in our cities and communities are getting smaller and smaller. People would often say that green requires high maintenance and costs a lot of money. But urban green isn't a luxury, it is, rather, a fundamental right that must be equally accessible to all people. For health and environmental reasons, we simply cannot afford to abandon green. Green spaces can bind small particles and nitrogen dioxide, produce oxygen and maintain biodiversity.

What do our future cities look like? Due to climate change our obligations to step up and act is a necessity for all of us: citizens, urban planners, landscape architects and, last but not least, us nurserymen. We, the nurseries, are confronted with the very important task of cultivating those exact trees today which will be needed in five, ten, or even twenty years. These new trees must be able to adapt to tomorrow's climate. They must also be resistant to plant diseases and pests, some of which we might not be aware of today. For this reason we work very closely with scientific research groups. Celtis australis, Gleditsia triacanthos 'Skyline', Liquidambar styraciflua, Quercus cerris or even Quercus ilex, Sophora japonica 'Regent', Zelkova serrata 'Green Vase' belong to this group of future trees.

For the society at large, it is of utmost importance to stay informed about the benefits of urban green. For this reason, the European Nurserystock Association (ENA) has launched the EU campaign "Green Cities for a Sustainable Europe" (www.thegreencity.eu) in 2018, rolled out in seven European countries. The project for the grant subsidies, in particular, addresses local authorities because, in most cases, they are the decision makers when it comes to funding urban green spaces. Today, more than ever, our industry needs to position itself confidently and be above politics. Green should not be seen as a decorative accessory but must be an integral part of city and town planning.



KAROL PAWLAK

Date and place of birth:

1954, Wiecbork

Married to: Anna, who supervises the company's laboratory business

Three children: Agnieszka, responsible for the sales force at Vitroflora. Philippe, IT specialist and horticultural engineer at Vitroflora. Konrad, taking care of the supply chain to retailers and participating in the administration of Vitroflora, Owiplant and Zidioflora.

Karol Pawlak eager to take Fleuroselect global

Fleuroselect, a major international networking platform for key players in the ornamental plant industry, announced last month that Karol Pawlak has been appointed President effective of January 1st 2019. As the economic spotlight shifts to emerging markets, Pawlak is eager to take the Fleuroselect organisation global and thus prove its members' potential for expansion and growth.

AUTHOR: RON VAN DER PLOEG PHOTOS: FLEUROSELECT

FloraCulture International: Karol, does the job seem like a natural fit?

Karol Pawlak: "I have been on the Board of Fleuroselect already for six years and as a senior member this was a logical step. In the past I have been on the Board of the Polish Horticultural Union, PZO, for seven years and also represented the Polish Union at AIPH. I was also the President of PSA Polish Agricultural Business Council, an organisation which I set up and was affiliated at the Ministry of Agriculture."

What are you most looking forward to in the next three years as Fleuroselect President?

"We have executed a questionnaire amongst our members and during the next period it will be my task to fulfil their expectations. We are also celebrating Fleuroselect's 50th anniversary in 2020 which will be a highlight."

Fleuroselect's motto is 'By the members for the members'. How do you think the organisation helps its 75 members grow?

"Our organisation promotes networking between companies, promotes their products and also has a role in promoting plants in general. This all contributes to growth."

Worldwide, the ornamental plant business is consolidating. How difficult is it for the organisation itself to grow?

"We have to look at new areas of opportunity. Take for example pot plant and cut flower companies. This is an area where we can expand."

What is the biggest challenge you feel Fleuroselect faces and how will you inspire your members to tackle it head-on?

"The biggest challenge is to develop networking.

This is what our members are asking us for. In our recent questionnaire this was one of the key areas for Fleuroselect and we want to create the best atmosphere and opportunities."

How have you seen Fleuroselect change and evolve in recent years?

"In recent years we have increased our promotion. We use all available media, including social media, to reach our audience. Our FleuroStar contest, developed over the last 8-10 years, has become a key industry award with high visibility. We serve our industry with our knowledge and professionalism of the branch."

Friends call you a pragmatic, straightforward man. What are the differences in policy making in daily horticultural business versus decision making at the industry association level?

"Key matters for the branch are, in the end, also good for business. On the Board we have always had leaders who have been key managers/owners in business."

Is Fleuroselect's voice strong enough? In other words, what power does Fleuroselect have at the international level?

"We have a strong voice, but it is not strong enough. We are often seen as a European organisation. It is one of our goals to become more international."

Let's touch on horticultural business versus politics. Do you think government assistance is required for the ornamental plants sector to flourish?

"Some of our members think we should be more in contact with government, but we are not a lobbying organisation. From my experience of leading a business in communist Poland we were happy that we did not have a horticultural department in our Ministry of Agriculture. Today the world is different, but there are

other organisations that are stronger in lobbying. This is not one of our key objectives.”

How important is it to forge relationships with other industry associations?

“We are an associate member of ISF, the International Seed Federation, and last year we participated in the World Floral Summit. We have friendly contacts with AIPH, CIOFORA and Plantum who regularly contribute their expertise at seminars and conferences which we organise. We visit each other’s meetings and share information.”

Arguably the industry organisation that most closely resembles Fleuroselect is CIOFORA. You are both working in the field of plant breeders’ rights, research, promotion and education. What impedes you from joining forces?

“Ciopora is entirely concentrating on a-sexual breeding. At Fleuroselect we embrace both sexual and a-sexual propagation. Our organisations match only in a few aspects. We are happy to solve mutual problems and maintain excellent contacts with CIOFORA.”

What does the accelerated pace of change mean for present-day organisations such as Fleuroselect?

“In the end, business is always done between people and Fleuroselect is a people organisation. We pride ourselves on the excellent contacts between our members. With the ever-increasing pace of change, it is these personal contacts which benefit our members.”

You are known for being a man who demonstrates entrepreneurial spirit. Back in 1977 you were brave enough to take over your father’s business, investing money and intensifying international contacts in the ornamentals sector. What was the greatest risk you took to get where you are today?

“Actually I started a completely new business. My father only gave me 2 hectares of land. I do not feel I have had to take many risks. I developed my business step by step by carefully following the market trends and investing each year.”

QUICK FACTS

Founded in 1970, Fleuroselect is a not-for-profit, international organisation, serving 75 breeders, producers and distributors of ornamental varieties, with headquarters in Voorhout, Netherlands. Fleuroselect aims to test and evaluate new pot and bedding plants, promote award winners, protect member varieties, network with each other and contribute to the development and advancement of the industry as a whole. Fleuroselect comprises four business units, each providing for specific needs within the industry: Breeders, Production & Distribution, Home Gardening and Protection. The organisation is financed by contributions for membership, by fees for trials and Novelty Protection and by royalties on the turnover of awarded varieties. Activities such as policing of illegally reproduced cuttings, market survey of seedling and cutting sales and networking conferences are self-funding.



Pawlak: “We have a strong voice, but it is not strong enough.”

Can one say that the cut flower Gerbera and tissue culture production have laid a strong foundation for the Vitroflora company?

“Of course horticultural business under the communist regime was different. Ratio of cost to profit was better. Being a farmer or horticulturalist was tolerated. My master’s thesis was written on Gerbera and during my first years of business I started producing Gerbera young plants. Later, on due to changing circumstances including high import taxes for mother plants, I started tissue culture. This is still a large and important part of our business.”

You started out in 1977. After 41 years and many acquisitions later, both at home (minor share in the main competitor’s business PlantPol) and abroad (Bulgaria, Ukraine, Thailand and Portugal) and millions of young plants later, how do you envision the future of your company?

“We are very optimistic. We have an excellent portfolio and our sales are growing every year.”

Apart from working hard what are other pleasurable things in life for Karol Pawlak? How important is family life?

“My whole family (fourth and fifth generation) works with me in the company and already the sixth generation is showing interest. For us, family life and business go together. But I also have hobbies... I have a large library, I enjoy windsurfing and skiing.”

Could you sum up your philosophy of life in one sentence?

“Where God is on the first place, the rest is on the right place.”

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P = protected variety, propagation prohibited

Perfection is a never-ending quest

When greenhouses were invented, it was because growers wanted to protect crops from the weather. But the drive to be increasingly independent of external conditions has brought crops out of the soil and enabled ever-closer control over expensive inputs such as energy and water.

“Now we are becoming more independent of chemicals for pest and disease control and even of natural light,” says Sjaak Bakker, manager of the greenhouse horticulture research and development centre at Wageningen UR in the Netherlands, probably the world’s leading centre for commercial greenhouse research. Independence, in terms of food security, is propelling the huge expansion in greenhouse cultivation in countries such as China. This is a response to increasing population and a desire for greater control of food safety and in Russia, a result of EU food trade sanctions imposed in 2014. Advances in technology such as the ‘semi-closed’ greenhouse are also enabling food to be grown closer to markets, for example in arid regions of North America or the Middle East, and while much of the technology is designed for the edibles sector it then becomes available to floriculture too.

CLOSED, SEMI-CLOSED AND CONVENTIONAL

“At Wageningen, we’re now focusing on helping growers be independent of fossil fuel,” says Bakker. “We have a four-compartment demonstration house that’s fully electric. Heat pumps source warmth from the dehumidification system and CO₂ for enrichment is taken as waste from a nearby factory.”

Wageningen pioneered the ‘closed greenhouse’ concept and although Bakker says the costs mean it’s not currently commercially viable, many of its components are being more widely adopted. Several leading Dutch greenhouse manufacturers such as Bom Group, Certhon and Kubo have developed variations on the ‘semi-closed’ greenhouse which offer savings in energy – largely as a result of their approach to ventilation – and water use. “In many areas, as with projects we are involved with in the Middle East, water is a bigger issue than energy,” points out Bakker. At Estidamah, Saudi Arabia’s sustainable agricultural research and development centre in Riyadh, Wageningen is working with Bom

closed greenhouses, such as Bom Group’s Sunergy 2. The fan and duct system takes care of more of the ventilation requirements, so the vents and energy screens stay closed longer, retaining more heat. The air treatment units include heat exchangers to recapture heat as the air is dehumidified while summer heat surpluses are stored in an underground aquifer. Overall energy savings of up to 30 to 40% are claimed.

ULTRA-CLIMA GREENHOUSE

Semi-closed structures also offer some control of pests and diseases. Kubo’s Ultra-Clima greenhouse evolved through work with North American tomato grower Casey Houweling, initially to keep out insect pests. Houweling felt screened vents created too much shade; Kubo’s answer was an active ventilation system, with cooling pads for humidity

control, and a degree of positive pressure inside the house. In the last 10 years Houweling has built 50ha in California and 20ha in British Columbia, Canada, enabling him to grow year-round. The design’s water efficiency has also enabled him to build in Utah, one of the USA’s driest states, to supply Salt Lake City, using

“IN MANY AREAS, AS WITH PROJECTS WE ARE INVOLVED WITH IN THE MIDDLE EAST, WATER IS A BIGGER ISSUE THAN ENERGY”

Group to compare nine greenhouse designs, including a closed system and a conventional structure with pad and fan cooling, for sustainable crop production in the region. Photosensitive claddings are being tested for their ability to reduce greenhouse temperatures. In the latest generation of semi-



AUTHOR: SPENCE GUNN PHOTOS: G.J. VLEKKE



KLAAS SCHOONE MEMORIAL AWARD 2019

Klaas Schoone Memorial Award 2019

In 2019 the Schoone family, Floricultura and the Advisory Board will once again be presenting the Klaas Schoone Memorial Award to a person or company excelling in the international field of orchids.

Nominate yourself or your favourite candidate

Do you know a person, a group or an organisation that has made a difference in an innovative way in raising the field of orchids and everything it involves to a higher level? If so, please nominate them for the Klaas Schoone Memorial Award 2019. You may nominate a grower, a breeder or a propagator, but also innovations such

as new varieties, techniques, cultivation research, marketing concepts or business strategies. The Advisory Board will appoint an independent jury for all the categories. Please nominate your candidate by 31 December 2018 at the latest via the website: www.ksmaward.com



At Estidamah, Saudi Arabia's sustainable agricultural research and development centre in Riyadh, Wageningen is working with Bom Group to compare nine greenhouse designs (Photo credit Bom Group).

residual heat and waste CO₂ from a nearby power plant.

GUTTER HEIGHT

Greenhouses have been getting taller to accommodate high-wire crops and allow more room for lights and screens – but the greater volumes of air above crops such as cut flowers and pot plants has reduced fluctuations in temperature and humidity. “A gutter height of 6 to 7 metres is probably the maximum it is going to reach,” suggests Bom Group commercial manager John Meijer. “Apart from crop requirements, planning permission is also restricting heights in some places.”

LIGHT

The quest continues for technology to make better use of natural light. “I’m surprised how much has been done in the last few years to reduce the impact of structural elements,” says Bakker. “New composite materials will enable these to be even smaller. Although we can make some improvements to glass, with light diffusion and non-reflective coatings, we are probably getting close to what we can practically achieve.” The best available glass can now transmit in excess of 95% of the outside light. Wageningen engineers collaborated with Bom Group over its Winterlight greenhouse, the screen design and high transmission glass resulting in 10% more light reaching the crop than in a standard structure. More growers are opting for diffuse glass in new-builds to improve light penetration into the crop – and research is continuing on light diffusion patterns. So-called ‘smart glass’ technologies

are already available in which panes incorporate layers containing particles whose properties can be altered, for example when an electric current is applied, offering the prospect of ‘switchable’ light

“TECHNOLOGY IS TAKING PROTECTED CROPPING IN A NEW DIRECTION WITH THE RISE OF THE ‘URBAN FARM’”

New glass technology and developments in construction methods are helping to control both build and maintenance costs.

transmission or photosensitive claddings. Glasshouses with photovoltaic roof panels have been constructed – though with heavy penalties for light levels underneath – but Meijer says glass that can generate electricity may become economically feasible in future. New glass technology and developments in construction methods are helping to control both build and maintenance costs. Kubo’s ‘click facade’ design for frame components is quicker to assemble; while



GREENHOUSE DESIGN

its ‘w-cover’ rubber seal provides better support for large panes, reducing breakage risks, cutting water leakage and improving heat insulation. Modern Dutch glass-houses now have a life expectancy of 30 to 40 years.

URBAN FARMS

Technology is taking protected cropping in a new direction with the rise of the ‘urban farm’. Kubo has worked with Lufa Farms in Canada to build three Urban-Clima glass-houses on the roofs of industrial buildings around Montreal – the latest being 5,800 sq m in area. Meanwhile, Certhon has opened an innovation centre to research crop production in LED-lit closed environments. “Using indoor farming, all outside influences are excluded,” Certhon chief executive Hein van der Sande points out. “With Certhon’s Phytotron system, for example, all climate systems can be controlled – and with indoor farming there is no need for crop protection.” Certhon’s system has already been tested for Freesia production where unpredictable weather influences need to be avoided in the early stages, while Dutch orchid grower De Hoog uses an LED-lit indoor farm to control quality, shorten production times and aid scheduling.

ADAPTIVE DESIGN

Bakker insists technology must be matched to local conditions, the market and available expertise. “We call this adaptive design,” he says. “In areas like Africa or tropical lowlands in East Asia where some of the fastest expansion in protected cropping is occurring it’s not appropriate to have automatic environment control, for example. The best technology there is spectral-control claddings to reduce tunnel temperatures, passive roof venting and mesh sides.” He adds: “The fundamental issues in low-technology production are root disease, irrigation and nutrition so the first thing is substrate, rather than soil, cultivation which can improve productivity by 30% without having to address the greenhouse structure.”

Epic drama in iconic landscape

A *Xylella fastidiosa* conference at Flormart aimed at distinguishing fact from fiction and providing a solid, scientific overview.

AUTHOR: RON VAN DER PLOEG PHOTOS: ANVE

Xylella fastidiosa. The least one could say is that the name sounds somewhat unfortunate for Italian natives. *Fastidiosa* in combination with a feminine noun literally translates as ‘annoying’, ‘irritable’, ‘tiresome’ though these words barely begin to describe what is called one of the most dangerous plant bacteria worldwide. Speaking at an international Xylella fastidiosa conference at Flormart Padova this September, Gianni Cantele, vintner and President of the leading agricultural union *Coldiretti* touted it as “the worst plant disease an agricultural production area can have.” “It is un *drama epocale*, an epic drama which cause huge economic damage from the outset”, added Michele Lacenere, President of *Confagricoltura Bari*.

LOOMING SPECTRE

The looming spectre of Xylella fastidiosa first emerged near Gallipoli in the Apulia region of southern Italy. It was October 2013 and initially little attention was paid to some scattered olive trees looking droopy and fatigued with leaves turning brown. But then entire groves started to show symptoms ranging from leaf scorch to eventual dieback and death. Leonardo Capitanio, an ornamental plant grower in Monopoli and President of ANVE, the National Association of Nursery Stock Exporters, can’t recall where he was that day in 2013 when the Italian National Research Council (CNR) institute confirmed a case of Xylella fastidiosa had been discovered in the province of Lecce. What he does remember is how a mix of emotions and anxiety gradually engulfed the entire agricultural sector. “At first, they only talked about olive trees. But

soon attention shifted to the range of host plants which included a sizeable number of ornamental plants and wildflowers. Subsequently, scientists distinguished sub species of Xylella fastidiosa and their distribution and host range and this included plants that are not susceptible to the *pauca* sub species found in Apulia. It is expected that the EU will prohibit the movement of these plants from the demarcated area, too.”

WIDE RANGE OF HOST PLANTS

Xylella fastidiosa was first described one hundred years ago as a pathogen causing leaf scorch on grape vines in California. In Europe, however, little was known about Xylella fastidiosa until 2013. It is thought to have arrived in Europe via imported plants. Currently, the bacteria is linked to disease in a range of host plants in the Mediterranean areas of France, Italy and Spain and has been spotted on coffee plants imported from Central and South America. In September 2018, the EC Directorate General for Health and Food Safety released the 11th update of the database gathering all the host plants found to be susceptible to Xylella fastidiosa in the EU countries. The list is currently including 6 host species susceptible to X. fastidiosa subsp. fastidiosa, 46 susceptible to X. fastidiosa subsp. multiplex, 26 susceptible to X. fastidiosa subsp. pauca, and 12 species, found to be susceptible to X. fastidiosa, irrespective of the subspecies. In his conference presentation plant biologist at the CNR, *dottore* Boscia goes even further by stating that the European Food Safety Authority mentions 563 plant species in its most recent host plant data base.

VECTORS

Xylella fastidiosa is a Gram-negative bacteria that doesn’t produce spores. It is a quarantine organism and lives in the xylem tissue where it is believed to form a kind of biofilm and balloon-like outgrowths causing water movement to obstruct*. Symptoms vary greatly depending on the host plant’s species and its degree of susceptibility. They include leaf browning, marginal leaf scorch, wilting of foliage and crisped branches. The disease can be transmitted by insects from the Cicadellidae and Cercopidae families feeding from the plant’s xylem. In Europe the spittle bug (*Philaenus spumarius*) has been confirmed as the main vector of the disease. These crave the company of other insects like themselves, travelling in large groups. They sometimes reside in flocks of hundreds on one single plant. No cases of infection via tools or hands have been reported yet.

SUB SPECIES

To date, there are three valid sub species: Xylella fastidiosa sub species fastidiosa, Xylella fastidiosa sub species multiplex and Xylella fastidiosa sub species pauca, with presumed South American origin and associated with the outbreak in Apulia*. Additionally, there are three sub species which appear to be host-specific and geographically isolated in the USA: Xylella fastidiosa sub species sandyi, Xylella fastidiosa sub species morus and Xylella fastidiosa sub species tashke (in ornamental chitalpa trees only). Recently a newly described species, Xylella taiwanensis has been confirmed for causing leaf scorch on Asian pear in Taiwan*.



FAKE NEWS

Capitanio says he feels the whole business is under attack, leading to a flood of fake news. “Jobs and businesses are at stake. The bitter reality is that this disease couldn’t have found a better place to develop: an area densely planted with host plants – olives and vector insects that are basically everywhere.” Olive trees are intrinsically linked to the Apulian landscape, anchored in local traditions and culture. “And eradication of trees naturally leads to an eruption of public protest. What made things worse was that the emotional debate was fuelled by all kinds of conspiracy theories. Rumour had it that the bacteria had been introduced on purpose to increase pesticide sales. Another version was that it was introduced to accelerate the uprooting of trees allowing for the quick construction of a portion of the Trans Adriatic Pipeline,” explained Capitanio. Unfortunately this is the era where a ‘Say no to the eradication of olives’ call on social media by a famous person has far more impact than a scientifically-based, technical seminar by the Ministry.

STRICT HYGIENIC CONDITIONS

Xylella fastidiosa is a quarantine organism for which the EU has emergency control measures in place. Capitanio: “The authorities immediately announced control procedures but the seemingly endless attacks in the media and fake news slowed things down. In the meantime, this caused economic losses not only to the olive growers but also to ornamental plant growers inside and even outside the demarcated areas as international customers doubted the efficiency of the risk management approach and

preferred, in some cases, not to buy their plants in Italy.” These type of fears are unjustified says Capitanio and he cannot repeat it enough: “To date, not one single outbreak of Xylella fastidiosa has been reported in Apulia’s nursery stock sector and the disease has been limited so far only to olive groves. And this says a lot about the strict hygienic conditions at our plant nurseries and the professionalism of our growers. In a professionally run plant nursery, vector insects and bacteria are not present. Our customers don’t need to panic. Ornamental plants from Apulian and Italy at large are perfectly safe and healthy.”

DEMARCATED AREAS

As there is no cure or treatment available for Xylella fastidiosa, affected growers were simply told to uproot and burn their iconic trees. It soon became clear that the attempts for eradication were fruitless. If only due to the many private properties dotted with secular olive trees and whose owners would be impossible to trace and to order to uproot their trees. What followed was a programme of ‘contentimento’, the establishment of demarcated areas, consisting of an infected zone,

Same place, different photo. The image clearly depicts how devastating the bacteria is.



containment zone and a buffer zone. In the autumn of 2013, this demarcated area was 8,000 ha whereas in 2018 is expanded into 775,000 ha. It is questionable whether the spread could have been slowed down but it is safe to say that red tape, miscommunication and the lack of a proactive approach did not help matters. “The outbreak of Xylella fastidiosa in Puglia is a perfect example of how not to handle a killer plant disease”, said Sabrina Diamanti from the Italy’s National Council of Agronomists and Forestry, adding that “I sincerely wish that with help and support scientific solutions can be found in the near future.”

SIGNATURE OLIVE INDUSTRY

In Italy, the bacteria jeopardises, above all, Apulia’s signature olive industry, which makes a considerable contribution to the state’s economy. Statistics reveal that the region’s olive growers produce 40% of Italy’s total olive oil, while Italy as a whole accounts for 15% of the world’s virgin oil. The total area dedicated to olive oil production in Apulia is 400,000 ha, which equated to 200,000 tons in 2017 (price €3/kg). The sector represented a value of 600 million euros in 2017. Crop losses due to Xylella fastidiosa have a direct impact on producers, consumers and the national economy. Estimated economic losses since 2013 stand at one billion euros. As for losses in Apulia’s ornamental plant sector, Capitanio says that there is no official data but rough estimates predict that over the next few years losses in larger demarcated areas will cost over one billion euros.

It might be too early to speak about real solutions, but it’s definitely not all doom and gloom. As previously mentioned mechanical weeders in springtime can significantly help reduce vector populations. Moreover, scientists and breeders are working tirelessly to create Xylella fastidiosa-tolerant cultivars. Initial results are promising with the time-tested Leccino cultivar and the FS-17 (Favolosa) cultivar proving to be particularly resilient to Xylella attacks.

Sources:
www.ponteproject.eu
www.efsa.europa.eu.
*Review of bacterial pathogens of economic importance to UK crops (Dr. S.J. Roberts).
European Commission Directorate-General for Health and Food Safety.

Florensis continues to build on Herman's legacy

A company anniversary, greenhouse expansion and the opening of a new centre for orphans and vulnerable children. Africa was the locale to celebrate quite a few important milestones for horticultural giant Florensis. At each occasion, it was good to see how Herman Hamer's family honored the late CEO's memory by dedicating themselves to continuing the work he loved so much.

AUTHOR: RON VAN DER PLOEG PHOTOS: FLORENSIS

Florensis Kenya is celebrating its 20th anniversary this year. To mark the occasion the company's long-serving staff gathered at a cocktail party on October 4. One of the greenhouses was transformed into an elegant setting for a gala dinner. A night of great food and drink, cheers and live entertainment with 450 employees dressed to the nines. Of note were the many women present whose dresses, with different unique colour combinations, not only made them look very beautiful, but



In Naivasha, Rian Hamer and her brother-in-law Wim-Arie kicked off construction of a state-of-the-art NAKT Elite greenhouse.



Staff gather for the 20th anniversary celebration.

also evoked the perfect party atmosphere. The highlight of the evening was the performance of well-known Kenyan comedian Willebroda and his sidekick Awinja.

OPPORTUNITIES

The late Herman Hamer and Jan Ammerlaan embarked on their first trade mission to Kenya in 1997 to explore opportunities in the young plant industry and grow exports of the company's range of starting material for annuals and perennials. Labour and fuel costs continued to rise in the Netherlands so like many other ornamental plant breeders at the time, Florensis turned to Africa to produce cuttings, not least because the country is blessed with year-round sunshine. From its humble beginnings in 1998, operating from a 1 ha greenhouse, Florensis Kenya continued to grow and evolve as the company gained in popularity. Today, they grow 14 ha of cuttings and employ a staff of 450. 2011 marked the company's major expansion when greenhouses, processing areas and offices of the both neighbouring companies were added to the business.

WATER AND SANITATION PLAN

One of the company's business priorities is corporate social responsibility, a task Herman's widow Rian Hamer and his brother Wim-Arie Hamer have taken on with dedication and commitment. For example, Florensis Kenya recognises safe drinking water is an important issue in its home town of Naivasha. Naivasha is situated on the shores of Lake Naivasha which is the primary water resource in the Rift Valley region of Kenya and the country as a whole. Due to high pumping costs and treating the lake water, drilled wells serve as the water supply. But the Rift Valley, being a highly volcanic area, is a high-fluoride groundwater area. The WHO guideline value for fluoride in drinking water remains at 1.5 mg/L. In Naivasha, fluoride concentration ranges from 20 to 45 mg/L. A few years ago, Florensis began to implement a project whereby drinking water is treated with reverse osmosis. However, one adverse effect is that a reverse osmosis system may waste around four liters of water for every five liters of purified water produced. And apart from



The OVC Centre supports 135 children with daily meals, medical care, clothes, day care and education.

pumping this back into wetlands, the company now uses this water to fill five giant tanks for fish farming. In 2017, Florensis' CEO Leo Hoogendoorn was presented with the Plantum CSR Encouragement Award in recognition of the company's water and sanitation plan.

NAKT ELITE GREENHOUSE

One day before the gala dinner and festivities in Naivasha, Rian Hamer and her brother-in-law Wim-Arie kicked off construction of a state-of-the-art NAKT Elite greenhouse, which will be used for growing premium quality cuttings. NAKT Elite is a Dutch certification scheme and certified starting material is free from relevant pathogens which is being guaranteed by the applied testing protocols in combination with a quality management system.

OVC CENTRE

Subsequently, the Hamers flew over to Koka, Ethiopia where they officially opened the Herman Hamer OVC (Orphans and Vulnerable Children) Centre. It was good to see how both remain entrepreneurial and innovative, Rian especially staying connected with the industry and keeping an active presence. Monday November 12 will mark the first anniversary of Herman Hamer's passing. Hamer, who played a pivotal role in Florensis and the international organisation for the ornamental plants industry, Fleuroselect, died at the early age of 60. The best way to honour his memory is to build on the legacy he left the industry, continuing to develop the humane values of responsibility of which the OVC Centre is an example. The project was funded by the Hamer family when Florensis celebrated their 75th anniversary in 2016. Daily operation of the school

is in hands of SAEDO, the Social And Environmental Development Organisation, which was set up by Florensis, Syngenta and Dümme Orange back in 2014. The OVC Centre supports 135 children with daily meals, medical care, clothes, day care and education. SAEDO not only supports the children but also their host families by providing proper housing and developing economic activities such as the Women's Empowerment Group. Speaking at Herman Hamer OVC's opening ceremony Rian Hamer said, "Florensis and my family are extremely proud and happy that we are able to give something back to the local community. We are very well aware of the vulnerability but also the potential of the children. I have children of my own and fully understand how important it is to protect them. The new centre will give the children a safe harbour while offering them education, attention and lots of love." Attending the opening ceremony were regional government representatives, host families and the Dutch Ambassador to Kenya, Mr. Bengt van Loosdrecht who expressed his appreciation to the farms for their community support.



Wim-Arie and Rian unveil the commemorative stone at the Herman Hamer OVC.



BREXIT PREPAREDNESS

Mr. Hidde J. Koenraad is Partner Intellectual Property at Boekx Advocaten (Amsterdam).

As of the writing of this first column on legal issues in the ornamental industry, no deal has yet been reached between the UK and the EU on Brexit. Both the European Commission and the UK government have published Brexit preparedness papers and technical notices for the 'no deal' scenario, wherein the UK leaves the EU and becomes a 'third country' on March 29, 2019 without an agreement or framework for a future relationship in place.

Brexit creates uncertainty, although more guidance has recently been provided as to how the UK government will deal with various aspects related to trade in plant products. For example, the paper 'Importing and Exporting Plants and Plant Products If There's No Brexit Deal' states that "the UK government has decided that the majority of plants and plant products are low-risk and should continue to enter the UK from the EU freely, as they do now". The paper includes technical notes and details on various other aspects of importing and exporting of plants between the EU and the UK.

Brexit will have different consequences for different intellectual property rights. Companies should take into account that their Community Plant Variety Rights (CPVR), EU trademarks (EUTMs) and Community Design rights (RCDs) will cease to have effect in the UK. An update on EU IP rights can be found in the technical notes of the UK government from September 24, 2018. These confirm, inter alia, that EUTMs and RCDs will be protected in the UK as a split-out comparable UK right immediately on Brexit. The UK right will be provided with minimal administrative burden. The paper confirms that, also in a 'no deal' scenario, applications for EUTMs and RCDs pending at the Brexit date will need to be re-filed as UK applications in order to secure UK protection. However, if this is done within nine months of the Brexit date, the original priority date can be preserved. No guidance notes are available specifically for CPVR's, but it is expected that, in general, similar rules will apply.

POINSETTIA'S STAR IS SHINING BRIGHTLY AFTER 17 YEARS OF CAMPAIGNING



AUTHOR: RON VAN DER PLOEG PHOTOS: SfE

The 'Stars for Europe' campaign is a European programme for the generic promotion of Poinsettias across 19 European countries and represents about 93% of the EU production of Poinsettias. Since 2011, the campaign has been approved by the European Commission and received EU funding with co-financing from European Poinsettia breeders Dümme Orange, Selecta One and supported by Beekenkamp B.V. and MNP Flowers. The current EU campaign (number 734346) is 20% financed by breeders and 80% by the EU. The total sum of this campaign is about 1.7 million EUR.

The Poinsettia trade and consumer campaign Stars for Europe (SfE) began 17 years ago. Considering most plant purchasers today are over 65 year old, a particularly fierce competition that European Poinsettia growers face is (un)conventional competitors moving in on Poinsettia's share of wallet. However, the vision for the marketing initiative has remained unchanged, says campaign leader Dr. Susanne Lux.

POINSETTIA BEAUTY

"Stars for Europe is the perfect example of how the green industry can work together successfully to highlight one of the most beautiful products on earth and to bring Poinsettia's beauty to more homes Europe-wide. The reality is, consumption of flowers and plants is decreasing in major markets such as Germany, because they are a mass product that is being replaced by other goods, even plastic ones," says Susanne Lux who has managed SfE from the outset. On the topic of Poinsettia's unique identity and value proposition, Lux says that Poinsettias "are all about Christmas, a festive mood. Their wonderful colours brighten homes when daylight is fleeting. They are only available for a couple of weeks, and like any other seasonal product such as Ferrero Rocher and Lebkuchen, everyone is expecting them."

MANY FACES

Despite all the marketing muscle behind the Poinsettia, little is known about the many faces of the plant. Lux: "Take Princettias. They come in a range of colours, including pink and white. They are great for reaching younger target groups, but these colours represent more or less niche markets. There are yellow varieties for autumn, and they come in unusual curled shapes and rose forms too, so often specialist journalists are looking for these. But of course, for the mass market, red is a firm favourite. Up to 75% of European grown Poinsettias are red." However, specialty varieties face a problem as they are usually offered by florists, garden centres and retail gardeners, thus only a limited number of outlets, and often for a short period of time at the beginning of the



POINSETTIA CUT FLOWERS

The positioning of the Poinsettia as a cut flower should be considered as an additional marketing tool that doesn't dig too deep. The cut flower industry is a world apart and few Poinsettia varieties are used as a cut flower in a big way. However, it can be a vital part of the PR message used to reach consumer media as journalists are often looking for an interesting or unusual angle. It's not something consumers are likely to do on a huge scale, but it can be an effective way to create memorable marketing messages about Poinsettias. Poinsettia, a member of the milky Euphorbia family, is probably not the easiest flower to use in a bouquet. Investigations on shelf life and SfE share the proven technique which involves sealing the milky sap so it doesn't leak. Trials have shown cut Poinsettias can stay fresh for up to two weeks if the cut stems are held in 60°C water for a few seconds immediately after cutting, then dipped in cold water.

holiday season. Consumers spot them in mainstream magazines but often cannot find them in supermarkets and discount outlets.

PASSION

Around 110 million Poinsettias are produced each year in Europe by growers who all share a serious passion for their job. How does one convey this passion to the European consumer? "Generic promotion is strengthened by sharing that passion with others and passing ideas, marketing tools and messages onto colleagues, suppliers and customers who all have the same goal – selling more Poinsettias," outlines Lux. She encourages European growers to come 'on board'. "Use the material we produce. From our trade-facing website, www.sfe-web.com, we provide POS material for print usage along with various other tools such as quality and care icons that can be used as stickers, as well as videos and guidance for Poinsettias in transit, in store and more. We have our own MyPoinsettia YouTube channel to educate and inspire the trade in care and handling, train florists and inspire consumers interested in craft and DIY." When asked to reveal a surprising Poinsettia fact which might be unknown to the general populace, Lux points

out that within the EU there's a big difference in trends and traditions. There's a lot to be said for the name, for example in Germany it is known as Weihnachtsstern, directly translated as 'Christmas Star', while in countries like the UK it is simply known as a Poinsettia so that link to Christmas isn't quite so strong when it comes to communication and marketing messages.

DO NOT WORK IN ISOLATION

SfE's long-lasting campaign might trigger some jealousy among other typical Christmas crops such as Amaryllis, Christmas cactus, Christmas rose and mistletoe. "To get access to EU funds the industry should really work together as an umbrella group. In the past, in Germany this was the responsibility of CMA, the Centrale Marketingagentur der deutschen Agrarwirtschaft. In the Netherlands, this is done by the Flower Council of Holland. Working in isolation will mean forfeiting knowledge. Now, financial support from the EU has been limited to six years per country."

The main criteria for being granted financial support are being the representative for a market, working together with other countries and setting up a good proposal with efficient measures based on sound market data. Most importantly, winning the grant is only the first step. Having knowledge of how to organise campaigns so that you are not later overwhelmed by the administrative burden is another important factor.

Since 2011, the marketing initiative has been supported by the EU in some countries. Lux: "All countries within the EU can be supported. Technically there is no limitation. However, you need sound market data for every country chosen and it's important to have a stable partnership with trade-related organisations in each country as well. Ideally, you need agencies with experience in both generic plant marketing and EU funding. In terms of sourcing market data, in the past SfE has used Productschap Tuinbouw and also producer and grower organisations (for example, in the UK). In Italy we work with ISMEA and in Germany, sound long-term data comes from GfK and has done so for 20 years. In France, it's Val'hor. Market data can also be sourced from several other channels, for example research conducted by a garden centre chain."

YOUNGER TARGET GROUPS

Looking back on 17 years SfE, Lux is satisfied that the campaign is proving effective relative to other markets because the Poinsettia market has remained stable while the general market for indoor pot plants has decreased. "GfK statistics show that we were particularly successful in reaching the younger target groups." SfE is all about branding. What is Suzanne Lux's personal Christmas brand? "Our Christmas decoration starts with a yearly Thanksgiving Party at the end of November. We took over this tradition from our American Pastor and since 2000 we've celebrated it in our house. From then on, our house is full of Poinsettias – Christmas is about being thankful."



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TAMING THE WILD INTO A TRENDY HOUSEPLANT

The road to successful newcomers and breeding breakthrough is not always easy to navigate as the Poinsettia is not a simple crop.

introduce new varieties to the marketplace requires a thorough look into all facets of the production process and the supply chain alike.

RED, RED... AND RED

For most growers Poinsettia is a commodity crop, a side crop and perfect way to earn extra money in the winter time. To really transform Poinsettias into a cash crop, for example, bold, less-mainstream colours and rose-shaped bracts are needed.

Today sales are still dominated by the red varieties such as 'Christmas Feelings', 'Premium Red', 'Red Soul', 'Prestige Red', 'Ferrara', 'EuroGlory', 'Astro', 'Leona', 'Viking' and 'Christmas Feelings Dark Red'. As red Poinsettias are a quintessential Christmas crop, breeders are well-aware how difficult it is to change a plant's image. On the one hand, they feel the consumer is ready for pink Poinsettias outside of the holiday season, while, on the other hand they notice how reluctant the traditional supply chain is.

BREEDING CRITERIA

With Botrytis, Phytophthora, Pythium, Rhizoctonia, Xanthomonas, Curtobacterium flaccumfaciens pv. and Bemisia tabaci being one of the dreaded pests and diseases in Poinsettia cropping, built-in resistance in new varieties is clearly on the breeders' radar.

Newcomers must continue to yield consistently and excel in crop performance along the supply chain. Poinsettia breeding programmes place a lot of attention on overall looks, but it is equally important that a Poinsettia can be grown successfully by the grower and preferably in the most environmental friendly way. Usually, the easiest varieties to grow are not necessarily the ones with highest consumer appeal.

In breeding, other criteria to double check are: transportability, shelf life, cutting production yields and temperature tolerance.

Active breeding of the Poinsettia began in the 1950s. Institutes such as Pennsylvania State University, the University of Maryland, the USDA Research Center at Beltsville and horticultural firms such as Mikkelsen (USA), Heggs (Norway), Ecke (USA) and Fischer (Germany) deserve recognition for their early breeding efforts. Not only did they have visionary ideas about creating new crops and developing new markets, these Poinsettia pioneers also lead the way in the development of quality standards. In a relatively short time they 'tamed' wild Poinsettia plants into a trendy, albeit seasonal, houseplant.

NOT A SIMPLE CROP

The road to success and breeding breakthrough is not always easy to navigate as the Poinsettia is not a simple crop. Seeds are not always readily available, there's inbreeding depression and the genetic diversity in Poinsettia is limited.

Today, a handful of breeders such as Dümmer Orange, Selecta One, Syngenta, Beekenkamp and MNP Flowers work tirelessly to create new varieties and improve upon old ones.

Breeders would say the future partly lies in more Poinsettia-focused research to fully understand the relationship with other members of the Euphorbiaceae family. This could help them set up the right breeding strategies. But basically this is true for all ornamental crops. Growers must have the right technical support as Poinsettia is truly a technical crop and to successfully

AUTHOR: RON VAN DER PLOEG PHOTOS: SFE

POINSETTIA SALES REMAIN RELATIVELY STABLE

European Poinsettia sales have remained relatively consistent over the last ten years while the rest of the flowering houseplant sector saw a significant decrease.

AUTHOR: RON VAN DER PLOEG PHOTOS: SFE

For all market stability, it's still not plain sailing for those in the Poinsettia business as it's experiencing a shift in buying patterns which then leads to other issues. Here we share some of Poinsettia's sales figures, with a focus on Germany where Poinsettia production and consumption is highest.

DISCOUNT STORES

A rapid rise in market share held by discount stores means average prices are falling. According to a German GfK consumer survey, consumer spend on Poinsettias dropped by 20% in 2017. This decrease is due to two factors. First, in 2017 consumers bought five percent fewer Poinsettia plants. However, the greater part of the decline in expenditure was due to price developments. In 2017, the average price for Poinsettias had returned to the long-term level of around EUR 2.80, as seen in previous years, compared with its significant increase in 2016. In retrospect, 2016 has remained an exceptional year. In 2017, the share of Poinsettias sold through discount stores increased significantly. Whereas in previous years it had been around 25 percent, it reached almost 30 percent in 2017.



SOCIO-DEMOGRAPHIC FACTORS

A look at socio-demographic factors shows that in 2017, consumers under 60 years of age again bought more Poinsettias than general flowering houseplants. 32 percent of indoor flowering plants purchased in 2017 were bought by consumers under 60 years of age, and 36 percent of Poinsettias were bought by under 60s. The proportion of Poinsettias bought by consumers under 45 years of age rose to 14 percent in 2017. In the previous year, the figure was 13 percent; from 2012 to 2014, the figures were 10 to 11 percent, respectively. Traditionally, the most important group of flower and plant buyers are those aged 65 and over. In 2017, 31 percent of flowering houseplants were bought by consumers over 75 years of age. That is over 55 percent more than 5 years ago. In 2017, 26 percent more Poinsettias were purchased in the 75+ age group. In 2012, the proportion of flowering houseplants bought by over 75s was 23 percent and that of Poinsettias was 21 percent.

PEAK SALES

An important sales week is traditionally the week before the first Sunday of Advent, when people decorate their homes for the beginning of the Advent season. In 2017, expenditure was much more evenly distributed than in previous years. In the sales period, which was one week shorter, week 48 was the peak week with just 19 percent of total spending. In previous years, the peak weeks accounted for up to 28 percent of total spending. The second strongest week of retail spending in 2017 was the pre-Christmas week, the 51st calendar week with 16 percent of spending. This is the highest figure achieved in the last ten years in a pre-Christmas week - partly due to the fact that Christmas Eve 2017 fell on a Sunday. This made the pre-Christmas week a complete sales week. In looking at the development of 2016 and 2017 month by month, it becomes clear that the results of December 2017 are significantly higher than 2016, while November is significantly weaker. In 2016, 57 percent of flowering houseplants bought in November were Poinsettias, and in 2017 this was 'only' 46 percent.

PRODUCTION

In 2017, German production again accounted for the majority of German Poinsettia consumption at 80 to 85 percent. Based on information provided by growers, some 26 million plants were produced. About 5 million Poinsettias were imported from the Netherlands. The Danish share is estimated at around 1 million. The actual number of imports from Denmark or how many Poinsettias are exported from Germany to neighbouring countries can only be estimated. Total consumption in Germany is estimated at around 32 million Poinsettias. For 2018, almost 80 percent of Poinsettias grown will be red, 11 percent white Poinsettias, 5 percent two-toned /speckled and 4 percent pink-coloured. According to growers' plans, the pot size distribution will also correspond to that of the previous year. 57 percent of the plants are to be grown in pot sizes 9 - 11 centimetres and 23 percent in standard sizes 12 and 12 centimetres respectively.

POINSETTIAS - AVERAGE PRICES IN GERMANY BY BUSINESS TYPE IN EUR

	2009	2010	2011	2012	2013	2014	2015	2016	2017
Florist	3,98	4,12	3,63	3,83	3,83	4,14	4,20	6,06*	4,35
Garden/ nursery	3,78	4,31	3,84	3,79	5,49	4,27	3,87	5,45	3,98
Garden centre	3,33	3,59	3,78	3,11	3,44	3,49	3,63	3,93	3,53
Total specialist florist trade	3,73	3,96	3,70	3,62	4,02	3,98	3,94	5,29	4,00
DIY stores	2,78	2,36	2,43	2,64	2,81	3,06	3,1	3,30	3,39
Food retailer (not discount)	1,92	2,10	2,04	1,99	1,97	1,89	1,99	2,04	2,10
Discount food retailer	1,59	1,76	1,74	1,98	1,87	2,06	2,02	2,10	1,90
Other	2,74	2,64	3,48	3,20	2,98	3,33	3,48	3,75	3,25
Total	2,69	2,77	2,75	2,76	2,83	2,86	2,81	3,34	2,80

GfK consumer panel *Outliers, statistically valid, but inexplicable.

In 2016, 35 special offer adverts from discount stores were recorded by AMI; in 2017 this number grew to 43. In 2016, over 50 percent of the Poinsettias that featured in special offers had pot sizes of at least 13 centimetres, and in 2017 this was only 30 percent. While the share of special offers/advertising materials recorded from discount stores remained constant at 9 percent, the share recorded from garden centres increased by 4, percentage points to 38 percent. The share from food retailers was 31 percent. The number of promotions recorded at DIY stores declined significantly. Important to note: AMI's special offer analysis does NOT reflect the number of purchases; it only surveyed how much retailers advertised Poinsettias. In the last season, the number of Poinsettias sold declined by 3 percent compared to 2016. In 2017, 10.4 percent of all Germans bought at least one Poinsettia and in the same year supermarkets and discount stores were the most popular places to buy Poinsettias.

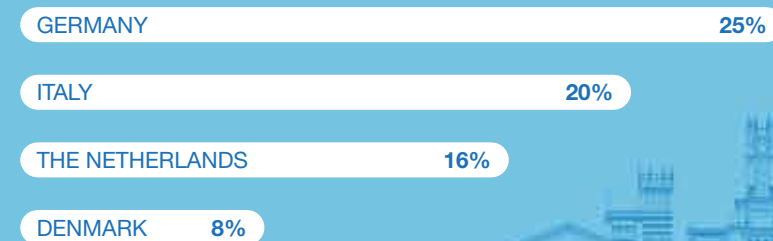
Poinsettia

Facts and figures

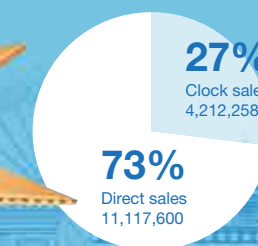
Walk of fame



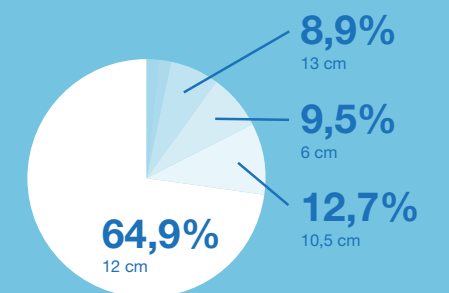
Production areas within the EU



2017 clock sales vs. direct sales



Popular pot sizes



Poinsettias at their peak

Poinsettias are a major staple when it comes to the holiday season with November and December being the peak trading months. The week before the first Sunday of Advent is an important sales week. In 2017, week 48 was the peak week with 19% of total spending. The second strongest week of retail spending was the pre-Christmas week, with 16% of spending.



Red Poinsettias: a firm favourite

For 2018, almost 80 percent of Poinsettias grown will be red, eleven percent white Poinsettias and five percent two-toned / speckled and four percent pink-coloured.

Sources: Stars for Europe, Royal FloraHolland, Agrarmarkt Informations-Gesellschaft (AMI) and GfK Consumer Panel.

Poinsettia sales at Royal FloraHolland.

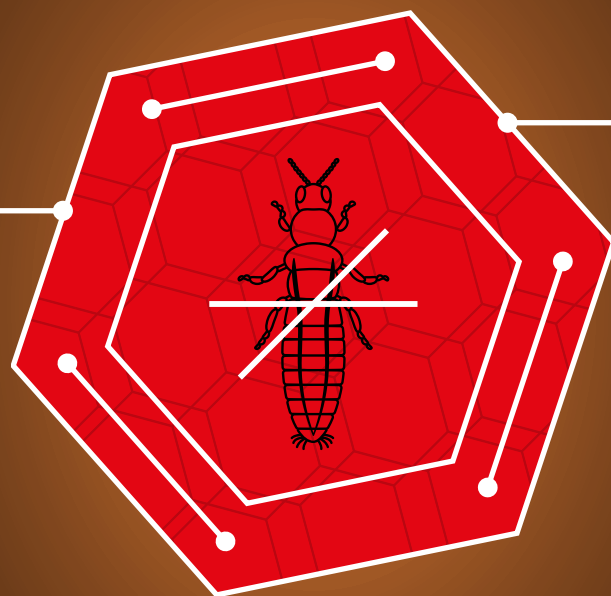


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ADVERTORIAL

DUDUTECH: BY GROWERS FOR GROWERS

Kenya-based biocontrols supplier Dudutech says IPM is more than a product. It is a philosophy of growing.

Touching on the intrinsic part of IPM Dudutech says that in order for it to do its best work, it needs to be employed holistically and continuously. The science behind this condition is that growing environments are biomes which harbour cultures of macro and micro-organisms which can benefit or harm to the crop. By looking after and introducing beneficial organisms and environmentally intelligent chemicals, growers allow nature and natural chemistry to protect their crops from harm and improve overall plant health. Growing with IPM makes produce safer for consumers, growing environments safer for workers and promotes sustainability agriculture.

IPM PIONEERS

Dudutech was founded in 2001 to develop biological pest control products for Homegrown, growers of fresh flowers and vegetables based in Naivasha, Kenya. Dudutech takes its name from the Swahili word "dudu" which means insect. Dudutech's mandate was to develop full integrated pest management (IPM) programmes to cover all of Homegrown's crops to reduce pesticide use and pesticide residues, to address the social and environmental issues surrounding pesticide use, to break pesticide resistance cycles in the crops and to promote long term sustainability in agriculture. The company says it pioneered Integrated Crop Management in Kenya.

Today, Dudutech has a team of over 250 full time staff, including experienced agronomists, PHD, masters and doctorate level scientists. Dudutech forms a part of Flamingo Horticulture Kenya, providing support on the ground in the form of biocontrol products, technical expertise and training. Dudutech has three production sites, 14 Ha of insect-producing greenhouses, and state of the art fungus and nematode production facilities

PRODUCT PORTFOLIO

Dudutech supplies 17 biocontrol products



which are developed and produced in-house (with more in the R&D pipeline), as well as a number of third party products from leading suppliers around the world which complement IPM and ICM practices. Product distribution networks in some of the world's most important agricultural economies including Kenya, Ethiopia, South Africa, Zimbabwe, Europe and North and South America are a vital part of the business.

Among the company's flagship products are Phytotech® (management of two-spotted mites, Nematech S® and Hypotech M® (both for the management of Thrips). To access industry and regional markets, Dudutech's products and processes

in looking after their crops in the best possible way to achieve the highest quality produce and reduce the number of harmful residues and minimise environmental impact.

In terms of scale, although the majority of customers are commercial export farming operations, each new customer's needs are unique and are looked at individually. The overwhelming majority of our products are destined to service the floriculture supply chain.

MEETING FACE TO FACE

The customer relationship model is driven by our "By Growers for Growers" philosophy and is highly interactive with support provided by dedicated teams of technical liaison officers (TLOs). These TLOs regularly visit their customers to track the progress of treatments or crop development directly while on the ground.

"THE OVERWHELMING MAJORITY OF OUR PRODUCTS ARE DESTINED TO SERVICE THE FLORICULTURE SUPPLY CHAIN"

conform to the rigorous standards set out by regulators for each market or industry. Dudutech is a proud part of: FiBL, ISO 9001:2008, AAK, Soil Association, iFoam Organics International, SABO, KAM, BPIA, Kephis, PCPB, KWS and IFS to name a few.

BUYER'S AUDIENCE

Dudutech's strongest customer base is around Kenya's agricultural regions in the central and eastern parts of the country where conditions allow year round growing. Customers are commercial agriculture businesses which are interested

The TLOs can rapidly identify pests or diseases and advise on a suitable regimen for the problem at hand. Dudutech researches, develops and supplies products derived from locally sourced macro and micro organisms without needing to import strains. These strains are best equipped to survive and thrive under local conditions while effectively managing pests and diseases. With a large centralised production facility based in Naivasha, Kenya, Dudutech can rapidly deliver biologicals and ensure fresh, consistent supply all year round.

An early summer must-see (2)

AUTHORS AND PHOTOGRAPHERS:
RON VAN DER FLOEG AND ALICIA GECOT

This year's FlowerTrials® took place June 12–15 in the Westland and Aalsmeer regions in the Netherlands and the Rheinland Westfalen region in Germany. A record 60 breeding companies launched thousands of novelty pot and bedding plants, merchandising programmes and concepts. In attendance were growers (37% of total visitors) followed by import/export specialists (21%), breeders/young plant producers (12%), retailers (6%) and auction representatives (1%). Here's our take on the biggest stories from FlowerTrials 2018.



COHEN

Calibrachoa varieties bred in Israel and Germany, *Dahlias* bred in New Zealand, *Sunpatiens* in Japan, by Sakata, *Lantana* bred by Syngenta. *Isotoma* bred in the UK. All these and much more featured in the wide-ranging Trials display by Israeli propagators Cohen.

For many visitors, probably the most immediately noticeable varieties were of *Dahlia* and *Dianthus*. The Imagine *Dahlia* collection comprised fifteen varieties bred by Volmary (brand-named Lubega by them). There were also the dramatically dark-leaved single-flowered Mystic varieties, bred by Kiwiflora.

In *Dianthus*, there was an impressive display of varieties in the thirty-strong Divine pot Carnation collection. These were bred in Israeli by Breier, whose breeding activities also include *Bacopa*, *Calibrachoa* (the large Caloha series), *Nemesia*, *Lobelia*, *Verbena* and *Petunia* (the Happy series).

SAKATA

To help customers narrow down which *Sunpatiens* are the best fit for landscape projects or retail shelves, the company completely reorganised the product offering consolidating it into two distinct series: *SunPatiens Compact* and *SunPatiens Vigorous*.

SunPatiens Compact stands for plants with shorter internodes and excellent branching. The series is bred for smaller container production and will help *SunPatiens* breakthrough at the retail level. To date, there are 12 colours available in the compact range with the slightly two-toned 'Compact Orchid Blush' being the latest newcomer.

SunPatiens Vigorous is a firm favourite with landscapers and ideal for massive, colourful and municipal planting applications. Plants feature a strong, upright habit with sturdy stems. Vigorous Lavender is said to be the most vigorous of all *SunPatiens*. This year, 'Red' replaces 'Vigorous Scarlet Red' while 'Rose Pink' is completely new.

Petchoa is a hybrid cross bringing together the best characteristics of *Petunia* and *Calibrachoa*, and is said to be tolerant of cold, heat and rain. In the build-up to the trials it lived up to the expectations with the outdoor display of *Petchoa* Beauticals amazingly bouncing back after torrential rain and wind.

Beauticals has foliage that is not sticky, so flowers drop easily from the plant as they age. What's more, they are available in five fancy colours: cinnamon, French vanilla, caramel yellow, Bordeaux and Sunray Pink which beautifully blend into mixes. These upgraded *Petchoas* stand out for their mounded habit and large flowers which, according to Sakata, "will fly off the retail bench."



FLORANOVA

The *Begonia* series Bossa Nova was in the prime position on the stand of Floranova, the British breeding company specialising in seed-raised ornamentals. The new Night Fever Papaya has orange-red flowers and is the first truly dark-leaved variety in this *B. boliviensis* hybrid series. Introduced in 2014, there are now eight colours. In the marketplace Bossa Nova is making its mark as an alternative to cuttings-raised series.

Two still more recently introduced Floranova series featured on the stand. One was cosmos Apollo, 60cm in garden height, in three colours and the pleasing pink and white shades mix Lovesong. The new annual Phlox series Popstars, with its star-shaped flowers, is proving very successful, says commercial director Julian

Wilson. Garden performance has proved to be strong.

The interspecific *Dianthus* series IQ was in preview status, with its launch planned in 2019. It is claimed to be earlier by five days than the competition.

Vegetalis is the associate company of Floranova founded to specialise in edibles, primarily for the patio container market. The current emphasis in breeding work is on disease resistance. The new *Vegetalis* tomato variety Summerlast, for example, has TMV and TMV2 resistance.





HISHTIL

Innovative grafted products – basil and Calibrachoa – gave clear distinctiveness to the Trials presentation of Hishtil, Israeli breeders and propagators. For their new Funtastic Calibrachoa trees, scions of varieties in the Caloha series are grafted on to specially grown Petunia stems.

Hishtil has already established a name for themselves for their basil trees. Trials visitors saw examples of these using a number of different varieties. The small-leaved El Greco was among them. Lavenders are another Hishtil speciality. On display were experimental varieties of both *Lavandula angustifolia* and *L.stoechas*. In the Libelle series of *L.stoechas*, Purple, Compact Blue and Compact Rose were all new. In the

same species there was an experimental series Lavish, also to see. Gaura and Penstemon were among other genera shown on the company's Trials benches. The dwarf, compact Gaura Summer Stars Baby, a newcomer, attracted much interest. Pentastic Blush was new for its recently introduced dwarf Penstemon series, large-flowered and very suitable for patio containers.

THOMPSON & MORGAN

Sunbelievable Brown-Eyed Girl, a new hybrid sunflower variety, was the centrepiece of the Thompson & Morgan stand. Cuttings-propagated, it is sterile and produces its large red and yellow flowers over a long period, on freely branched plants.

On their Trials stand, their new Isotoma (Laurentia) series Fizz 'n Pop featured prominently. So did their Cosmos varieties Lemonade, Cupcakes and Cupcakes Blush. The novelty Zonal Pelargonium Tall, Dark & Handsome featured, too, dark-leaved, red-flowered and with a long-stemmed erect growth habit that makes it ideal for training up on a trellis.

Fragrant Falls, the semi-trailing Begonia tuberhybrida series was also a stand highlight. In the company's own retail sales, Fragrant Falls is among its most enduring

successes. Plants are available to the trade in Europe from Beekenkamp Plants.

Long established in retail seed and plant business in the company's own country, the UK, Thompson & Morgan also has worldwide seeds sales and releases new vegetatively-propagated varieties into the international trade.



EVANTHIA

Sunsation, the variety that has proved a pace-setter in the market for dwarf pot sunflowers, was the focal point in the Evanthia display at the Trials.

The original Sunsation Yellow was shown alongside its sister varieties, Lemon and Flame, a bicolor. These two are re-introductions, both in improved versions with closer uniformity to Sunsation Yellow.

There was a display of young tropical plant material, too, including *Monstera deliciosa*.

This is an Evanthia specialty, grown from seed obtained from sources known personally by m.d. Nico Grootendorst for their high standards. The species is one in an extensive Evanthia listing of foliage plants popular as indoor house plants, especially in northern Europe. Both seed and young plants are sold.



MNP FLOWERS

Sundaville and Grandaisy were the two names most in the spotlight at MNP flowers' Trials presentation this year. From Japanese breeders Suntory, Mandevilla (Dipladenia) Sundaville is now a very well established brand with almost thirty varieties

Originally in red, pink and white, the colour range has now been extended, with the two new varieties Soft Peach and Apricot. Visitors this year were also able to see another newcomer, Mimi Red. This differs from Sundaville varieties of similar colour in its compactness and earliness. It is suitable for small pot production. MNP flowers presented a new event for retailers this year, to promote the Sundaville range (pages 16 and 17.) The *Argyranthemum* hybrid series Grandaisy is a much more

recent introduction. This year three more colours have been added – Gold, Ruby and Pink Tourmaline. This brings the total number of these free-flowering plants to eight.

In the Senetti series there was also a new colour on show, the first white. Flower centres are dark blue, the contrast adding to the impact.

VOLMARY

*Volmary put on show one of the most wide-ranging product displays of the Flower Trials. The highlights were very different from one another – among ornamentals the climbing plant *Thunbergia alata*, and among edibles the 'Candy Bar' a free-to-taste presentation of tomato and pepper varieties.*

There were new varieties in the cuttings-raised Sunny Suzy series of *Thunbergia*, such as the bicolor Amber Stripes. The colour range includes rose as well as the original orange and yellow. Mixed containers, with two or three of these colours, particularly drew visitors' attention.

Volmary's interest in edibles does not stop with tomatoes and peppers. At the trials they were also displaying their sweet potato variety Erato White, and Inka,

a variety of a South American tuberous plant called Yacon, but also known as the Peruvian Ground Apple. Volmary has its own breeding programme in sweet potatoes, with the intention of producing varieties especially suitable for cooler countries.



TO EXHIBIT OR NOT TO EXHIBIT?

Kim van Rijssen works for Plantipp BV, a Dutch company specialising in royalty management. Kim spent eight years in Beijing.

To exhibit or not to exhibit? In recent years, it seemed as if Plantarium had lost its former glory. Decline in footfall, inconvenient dates: buzz was not in its favor this year.

Plantarium has been the main trade fair for nursery products in the Netherlands for 36 years. Our company Plantipp has participated annually since 1999 and we did so again last August. This June we were also present at Garden Trials and Trade inaugural event, an initiative of the Plantarium organisers.

The show aims to attract visitors interested in the woodier type of plants that are not on display at the Flower Trials. For Plantipp, the timing is better than IPM in Essen (January) or Plantarium (August) because we can showcase most of our plants in bloom. We were satisfied with the show: small-sized yet great in terms of organisation and quality of visitors. We had invited our partners from the USA and Asia, who were happy that they could visit the two Trials during one trip to the Netherlands.

However, Plantarium was equally good this year. The organisers changed the layout and joined forces with GROEN-Direkt's trolley fair. Two fairs resulted in a steady stream of visitors. As for the timing of Plantarium: it gives attendees an opportunity to catch up with contacts right before the busy autumn season. Plantarium, IPM Essen and Garden Trials and Trade, are three networking events conveniently spread out over the course of the year.

By adding Garden Trials and Trade and changing the set-up of Plantarium, the organisers have acted on feedback of participants and visitors. An applaudable move, I think. Looking at the positive outcome of a survey held after the show, the majority of respondents agree with me. Will Plantipp exhibit at Plantarium again next year? Most likely, yes!



Expand your trade network and stay informed?

Visit the Royal FloraHolland trade fairs and events

Agenda 2019

- **Winter Fair** Aalsmeer. January 9, 10
- **Trade Fair Naaldwijk** Naaldwijk. March 6, 7
- **Spring Fair** Aalsmeer. April 3, 4
- **Autumn fair & Orchids Plaza** Naaldwijk. September 11, 12
- **Trade Fair Aalsmeer** Aalsmeer. November 6 - 8

www.royalfloraholland.com/tradefairs



Flowering the world.

ADVERTORIAL

'TOGETHER WE ARE STRONGER INTERNATIONALLY'

Growth opportunities for the Dutch floriculture industry are far away. Digitisation makes it possible to serve markets in other parts of the world. FCI discussed this with Steven van Schilfgaarde.

Royal FloraHolland is already the largest marketplace in the world. What are the aspirations? "The demand for flowers is increasing mainly in countries with high growth figures. China is one example of this, but consumers in other Asian countries are also buying flowers more often and in larger quantities. The same applies to Eastern Europe. My aim is for the Dutch floriculture industry to play a significant role in those countries. An online flower turnover of 7.5 billion euros is expected in China in 2019. Of course, our growers in Africa also recognise the great opportunities there, but they also know that it is not feasible to transport flowers from Kenya and Ethiopia to China via Aalsmeer."

FLORIDAY

"If we want to capture a share of the market in countries outside Europe, then

the role of Floriday as worldwide digital supply platform is crucial. International growers can put their entire supply up for sale via Floriday. Linked to sales channels, it creates a powerful digital ecosystem. China is a good illustration of how this can work. We will have to organise the logistical infrastructure in cooperation with partners such as exporters or transport companies. The transactions on the digital marketplace are the starting point from which the logistics and corresponding service must be coordinated. We will therefore have to set up so-called trade lanes with partners - for example, between Africa or South America and China or Australia."

OUR MAN IN CHINA

"This is easier said than done. The market in China can currently be characterised as "local for local". Nevertheless, there is plenty of interest in China for flowers from Africa or Europe due to the superior quality. On the other hand, the flowers and packaging must comply with strict specifications. In China, they do not work with agents who take care of the handling,

so this has to be done by the growers themselves. Our growers in Africa are not accustomed to that. It is also important to ensure proper financial settlement. We have our own office in China that we

share with our local partners. Martijn van Os is our man in China. We are not only gaining extensive experience, but we are also already doing business. We

"DIGITISATION MAKES IT POSSIBLE TO SERVE MARKETS IN OTHER PARTS OF THE WORLD"

are developing a Chinese webshop with a Dutch partner. A local presence is essential, especially in China."

AUCTION CLOCK

"With a view to internationalisation, we will have to update our existing instruments. The auction clock still always guarantees an optimum price. Each market has its own specific characteristics. In one country the florist is the most important sales channel, whereas in another country this is the supermarket. The online growth also differs considerably. Let us work with our partners in the chain to find a solution to this through cooperation, enabling further improvements to business operations. I am convinced that this way we can expand our leading global position."



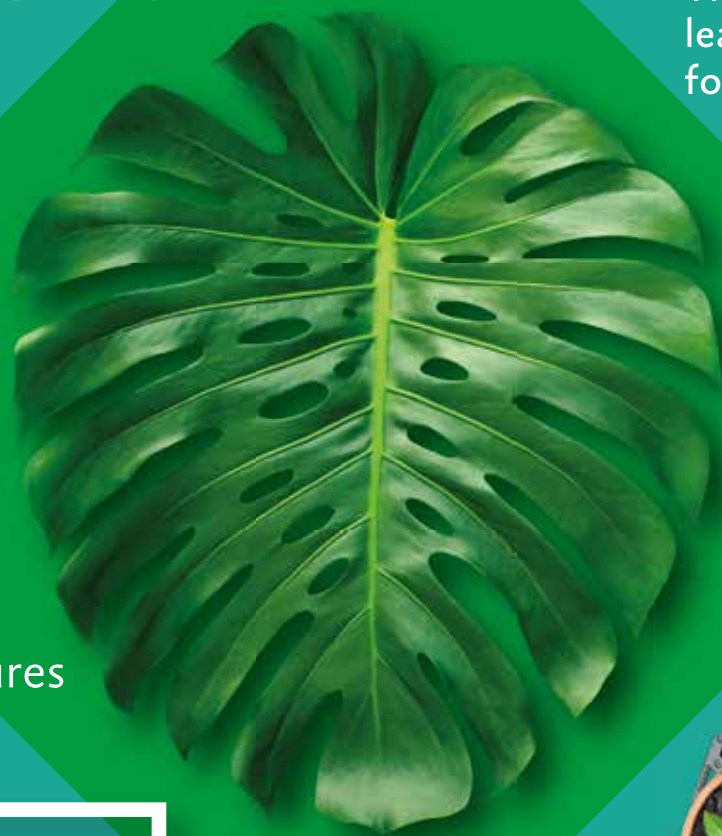
Royal FloraHolland's CEO
Steven van Schilfgaarde.

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AIPH APPROVES WIDER CATEGORY OF HORTICULTURAL EVENTS

Tim Briercliffe, Secretary General AIPH

The International Association of Horticultural Producers (AIPH) is the 'world's champion for the power of plants'. We seek to fulfil this through many different activities. One of these is through our role in approving International Horticultural Exhibitions. Our involvement in this area is defined in an international convention that dates back to the 1920's. The first international exhibition was really the Great Exhibition in London in 1851. Following that, many countries wanted to host similar exhibitions to the point that it became necessary to regulate number and quality of such exhibitions. This led to the formation of the Bureau International des Expositions (BIE) which still grants recognition to International Expos today.

AIPH is defined in the Convention as the body responsible for approving International Horticultural Exhibitions. Therefore, any country wanting to organise such an Expo, with the aim of inviting other countries to participate through diplomatic channels, then it must first be approved by AIPH. We take this role seriously. AIPH approved the first such Expo, the Floriade in Rotterdam, back in 1960. Since then many similar Expos have been granted AIPH approval and there are many more lined up for the decade ahead.

Such exhibitions provide a unique opportunity for the horticulture industry within the hosting country to show what it can do to a national and global audience. Many are integrating the themes of Green City which are so strongly promoted by AIPH and our members. They position the horticulture industry as a solution to many of the problems that an urbanising planet faces.

In support of the industry AIPH has broadened the range of exhibitions that can be approved. We have four categories that encompass a broad range of international exhibitions aimed at the public through to international B2B exhibitions within the industry. The first of such trade exhibitions to be approved are Greentech (the Netherlands) and Flormart (Italy). In granting our approval we make careful investigation into the quality of such events and their suitability as international industry events. We make sure that we are proud to be associated with each one that gains approval. We actively promote them to our members worldwide and directly to the industry through our media outlets, including FloraCulture International.

AIPH is uniquely positioned with our truly international membership and reach we can provide access to more of the industry than anyone else. We want the industry to make full use of this so please come and discover more about AIPH and the valuable work we seek to do in support of the ornamental horticulture industry.

A global
directory
of trade
shows and
exhibitions

EXHIBITION GUIDE 2019



The HTA National Plant Show, held at Stoneleigh Park in Warwickshire, celebrates its 10th birthday in 2019 – a real milestone in the UK horticultural calendar bringing together growers and retailers at a key point in the year.

AUTHOR: AMY WINDER

With plant sales, showcasing new products and networking at its core the show has seen changes over the course of its 10-year history from the development of the seminar offering to the addition of a sister event to run alongside it – the Nursery Supply Show. The show has grown in exhibitor numbers over time, not only because of the success of the event, but due to the exceptionally high quality of the plants that exhibitors bring. Part of its success is down to the level playing field approach of only allowing a maximum of two stands per company. This really

allows the 'plants to do the talking', the strapline adopted by the show. Awards such as 'Planting the Seed' encourage exhibitors to maximise on their displays, inspiring retailers on what can be achieved with their products and highlighting the key features available.

The New Plant Awards are at the heart of the show and extremely popular with visitors and exhibitors alike – attracting around 100 entries year on year. The awards have also proved to be a forecast on what plants will do well at shows and awards throughout the year. The development of the Nursery Supply Show has meant that the full spectrum of suppliers, from labelling and product information, polytunnel and glasshouse supply, substrates and growing media are in place and brings additional benefit to those exhibiting in the National Plant Show. This show is moving to Hall 1 in 2019 giving it more scope for development and growth in the future.

The Retail Concept Awards are the newest award at the HTA National Plant Show, and the most exciting

one for visitors to look at and vote for. This award gives retailers the opportunity to showcase the retail concepts that they have produced and exhibit these promotional displays directly to the potential retailer. With other industry initiatives such as the Retail Lab @ Glee having an increasing presence in the industry, never have retail trends had a stronger focus.

The HTA National Plant Show seminar area has also been a key player in the political landscape of horticulture over the past few years. Last year featured the first panel session discussing the use of plastics in the industry, off the back of the Blue Planet II documentary. Following on from this, a group of growers came together to look at developing an industry alternative – the recyclable taupe pot which is kerbside recyclable. The HTA National Plant Show and Nursery Supply Show take place on 18–19 June 2019 at Stoneleigh Park in Warwickshire. For further information visit www.nationalplantshow.co.uk

Germany dominates global trade fair scene

The trade fair industry in Germany continues to perform well. While there's been a slight growth within the domestic market, business is booming when it comes to the overseas activities of German trade show organisers.

Trade fairs in Germany are still popular with exhibitors and visitors from all over the world, according to research by the German trade association AUMA. At the 157 international and national trade events that took place in 2017, the average number of exhibitors was 2.5% higher than at previous editions, which represents a combined increase of 2% in rented square metres. The average number of visitors decreased slightly by 0.5%. This was caused by lower attendance figures at the country's automotive trade shows. Exhibitors and visitors from outside Germany play a key role in this positive trend. As in previous years, more exhibitors took part from abroad: around 5% more than at previous trade fairs.

According to AUMA, the good economic situation in Germany and the increased export opportunities are probably the major reasons for attracting interest from abroad. Last year, the major German trade fairs received 4% more foreign visitors.

The number of participating German companies has virtually remained stable, after a few years of slight decline. According to the trade organisations, mergers and acquisitions in the SME sector are putting the brakes on investing in trade show participation. In 2017, it was the start-ups and newcomers on the exhibition floor who compensated for this decline.

For 2018, AUMA once again predicts a slight growth in the number of exhibitors and a stabilisation in the number of visitors. There are 178 trade shows planned this year which fall within the scope of the annual survey from the German trade association. The association bases its growth forecast on research undertaken in November 2017 with 500 selected German exhibitors conducted by Kantar TNS on behalf of AUMA.

According to an AUMA survey, trade fair organisers are feeling positive about the immediate future. Most trade fairs expect a higher turnover in 2018 and anticipate hiring more employees. At the same time, German trade fair organisers are once again planning for major trade fairs abroad: this year 314 trade fairs in 38 countries were planned.

SOURCE: EXPOVISIE



FAIR GAME

Christophe Landuyt is chief editor of Expovisie in Belgium and exhibition trainer at Expo-id.

Much has been said about the attention economy. The concept can be explained in many ways. Sometimes it refers to companies that scrape the bottom of the barrel in order to keep the brief attention of a potential consumer, and sometimes it refers to companies that pay attention to the consumer at other times than at the moment of purchase, hoping to make them a brand ambassador.

You can say many a bad thing about trade shows: they are expensive, they are very time-consuming both to participate and to visit....

But you can't say that it's difficult for exhibitors to get the visitor's attention for a few seconds. On the contrary, you can break almost every rule, but for those few moments you will still get the attention of a passing visitor. Busy on the phone? Slumped on a chair? Hands in your pockets? Dandruff on your jacket? Whiff of alcohol? Garlic breath? Everyone will turn a blind eye!

Online, everyone has to bend over backwards just to be noticed for a moment by that multitasking, fickle, skittish, mobile consumer. At a trade show, by contrast, they are presented to us on a silver platter. Take a good look around! There they are, in the aisle, less than half a meter from your stand. In plain sight and within shooting distance. Fair game; almost begging to be targeted.

Why are you still sitting down? Why don't you put away your smartphone? Why does every little bit of your body language betray that you are not in the mood (today)? Why not say what even the most incompetent web shop says? Thanks for coming, thanks for looking at my products, thanks for interacting with me for a while and have a nice day....



It's festivalisation time!

The complete overhaul of the east wing of Messe Essen's convention centre has taken some time but Oliver P. Kuhrt, CEO of Messe Essen and Andrea Hölker, Project Coordinator for IPM ESSEN, are pleased that they are now on the homestretch to the New Messe Essen.

Read on about the do's and don'ts for a successful trade show and the expectations for IPM Essen 2019.

AUTHOR: RON VAN DER PLOEG

The countdown is on for Messe Essen's 36th annual event IPM Essen, which is set to take place January 22-25, 2019. All preparations are on schedule. Ms. Andrea Hölker: "The modernisation of the Messe Essen has taken some years but we are pleased that we are on the home-stretch to the New Messe Essen. The last construction phase has begun and we have already been able to utilise large parts of our new site. Feedback from our exhibitors and visitors has been overwhelmingly positive so far. In 2019, IPM ESSEN will need temporary halls for the last time. From 2020 onward, the world's leading fair for horticulture will then take place in one of the most modern fair sites in Germany, in halls flooded with natural daylight. New ground-level halls will permit

two-storey, sophisticated booth construction. Moreover, the next IPM will already profit from the new Service Centre. Located in the middle of the fair site, exhibitors will be given a new central port of call for all their concerns – immediately before, during and after the fair."

FLEXIBILITY

Kuhrt says that the fair business is naturally very competitive and requires a lot of flexibility. "On the one hand, we are experiencing the festivalisation of fairs. Fairs are becoming events. Here, emphasis is placed on the experience. On the other hand, fairs are increasingly developing into special-interest events. These constitute unadulterated, exclusive trade events with the focus on a clearly defined target group of visitors. We are serving both trends at Messe Essen."

IPM DISCOVERY CENTER

Hölker added that people expect a fair experience which is tailored to their first-rate, specialist orientation but one that entertains them at the same time. "A fair must trigger the feeling that you must be involved. IPM ESSEN may probably be cited as a prime example amongst our B2B fairs – a top-class trade fair for specialists from all over the world which, with its exclusive supporting programme (e.g. live shows in the Florist Event Centre), will captivate the public and arouse its enthusiasm. IPM Essen's new IPM Discovery Centre will place

its faith in discovering things and experiencing them yourself as a result of unusually designed booths, tours with experts, workshops, lectures and discussion forums. The visitors will enter, so to speak, their own worlds which they will explore virtually. Here, exhibitors will not present any pure products but will instead show courageous and trendy merchandising concepts. Visitors, predominantly representatives of the retail trade or from garden centres, will thus obtain new ideas, inspirations and clear recommendations for action for POS designing suitable for the future."

TOTALLY DIFFERENT EXPECTATIONS

Kuhrt acknowledges customising is a subject which has arrived in the fair business, too. "Today, participants in the sector, on both the exhibitor and visitor sides, have totally different expectations with regard to fairs. They would like the most individualised breadth possible in a defined area as to avoid much lost time while attending. This is what customers have become accustomed to when pursuing a digital platform such as Amazon or Netflix." With around 98% of B2B procurement customers have already familiarised themselves on the internet beforehand, having already seen 50% of the product before they visit a trade show. IPM Essen clearly states it is "digital first". Kuhrt: "Digital services are playing a greater role in organising fairs, not



Andrea Hölker,
Project Coordinator
IPM ESSEN



Oliver P. Kuhrt,
CEO of Messe Essen

only for exhibitors but also for visitors. Whether preparation, booking or registration – our customers want to use a quick, uncomplicated and preferably digital service. For our exhibitors, we have set up a central digital platform which can be used to control and order just about everything. There they can maintain and manage their own fair profiles, answer contact inquiries or order car park tickets."

Digitalisation is bringing convenience to both exhibitors and visitors and new, interesting revenue streams for Messe Essen, for example by marketing new digital advertising spaces. For IPM ESSEN, this means that the 2019 show has already debuted on the World Wide Web.

FAIR APP

IPM ESSEN is seeing continual growth in the use of digital services – not only by exhibitors but also by visitors. The introduction of a fair app with an integrated list of exhibitors from which you can select your favourites directly, add notes and obtain contact and product information, went down very well. Hölker: "Within the framework of the apps, we will also utilise beacons in our halls in order to point out exciting programme items to the users directly in situ. And the matchmaking function of the website which brings visitors together with exhibitors is being used actively too. Of course, the admission ticket is also available in digital form as a QR code on a smartphone. Visiting the fair has never been easier or more efficient."

A NEED FOR TRUST

However, digital tools are not everything. "Because business transactions are concluded between people," stresses Kuhrt. "There is a need for trust and that only arises in the direct exchange of ideas in person. For this reason, the prin-

"TAKE A UNIQUE CONCEPT, ADD FIRST-CLASS SERVICE AND A MODERN INFRASTRUCTURE AND FINALLY SPICE IT UP WITH AN AMPLE PORTION OF PASSION"

ciple of fairs will be highly relevant in the future, too. Especially in the ornamental plant sector, IPM ESSEN is indeed a particularly sensual and emotional fair. After all, flowers and plants are easiest to sell when customers can discover their appearance, fragrance and distinct qualities in person."

STAYING TRUE TO CORE VALUES

IPM Essen is highly committed to staying true to its core values and Kuhrt finds it difficult to make a statement about cross-selling opportunities. "Where does it start and where does it end? What applies to one sector does not necessarily apply to another. For example, IPM is a highly specialised trade fair where the top decision makers in the worldwide green sector meet

up in order to shape the future. This fair focuses on the element which connects everything, i.e. the plant. In times when 360° events are losing significance, you have to return to them time and time again. But when it is a question of marketing this plant in the best way possible, marginal products are indispensable. With the IPM Discovery Centre, we are explicitly offering concepts which specifically make use of

this: plants and barbecue, plants and fashion, plants and furniture etc. Nevertheless, we do not make any claim to wanting to be not only a plant fair but also a furniture or fashion fair." Currently competition between trade show organisers is fierce. Kuhrt concludes by saying that the trade exhibition that holds all the cards is "the one which is set up in the most flexible way and is capable of identifying trends and reacting to them, preferably before they even become popular. Our formula for success is: Take a unique concept, add first-class service and a modern infrastructure and finally spice it up with an ample portion of passion."



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The predominance of family-owned and run businesses in Poland's nursery stock industry brings strength to this industry through continuity of business relationships and commitment to quality, all supported by the natural friendliness of the Polish people.

This year saw the 26th edition of the Green is Life trade show in Warsaw, organised by the Polish Nurserymen Association. Many exhibitors have had trade stands since the start of Green is Life. The show provides nurseries old and new with the opportunity to establish their brand, and continuity maintains contact with customers, and connects with new ones. Exhibitors benefit from exchanging ideas with other nurseries, and seeing new products and trends. Some Polish nurseries, however, believe that exhibiting at other trade shows in alternate years gives their brand better exposure, and enables them to find out about a wider range of technologies and opportunities. Although Green is Life is essentially a trade show, and the first day of opening is reserved for trade to facilitate B2B opportunities, the public is invited to attend later in the week. This brings awareness to the end consumer of what is available, and who are the leaders in the nursery industry. Media coverage of Green is Life extends nationally and internationally, and many exhibitors say that the face-to-face contact at the expo helps to develop and expand brand recognition amongst Polish markets. Flexibility is the key to continuing success in changing markets. For almost 30 years Clematis Źródło Dobrych Pnaczy specialised in producing and breeding outstanding Clematis varieties, and many of its exclusive varieties can be seen around the world. A few years ago Clematis product range naturally progressed to include other climbers, recognising that climbers take up little space and are highly suitable for small gardens. And from this range of ornamental climbers the nursery further extended to fruit varieties, as home-grown fruit production increases in urban gardens. As businesses expand in size, mechanisation is commonly considered to save on



QUICK FACTS

17,000 visitors from 36 countries
62% of total visitors counted as decision-makers
7% increase in professionals visiting Green is Life
300 exhibitors from 10 countries
1/3 of exhibitors from outside Poland
3 exhibition halls and an outdoor garden fair

labour costs and improve efficiency. The Javo Buffer Belt is an automated process to move pots around nursery floors, and control spacing. With 70% of nursery labour costs committed to internal transport, Javo agent in Poland, Royal Brinkman, considers that 60-70% of Polish nurseries would be large enough to benefit from automation. Mechanisation that offers not just labour saving, but also an impressive way to reduce possible disease and weed spread, is the Steenks brush and vacuum equipment. The machine lifts dirt and debris from fabric or concrete, filtering out weed seeds and dust. Current methods of hand sweeping or blowers might make the floor seem clean, but do not effectively remove fine particles. A new exhibitor at the show this year, Steenks is ambitious to contribute to the continued growth of the Polish nursery industry.

A highlight of Green is Life each year is the Plant Novelty competition. Awards recognise plants that are superior novel introductions to the Polish ornamentals market. To get the most balanced opinion a jury of 9 people are asked to select the awards. Head of the jury panel, Wiesław Szydło, explained that the jury consisted of experts across a wide spectrum of the ornamentals sector

The Gold award went to Weigela Lime Monster 'BRS1' PBR, with its unusually large and crinkly leaves. Bronisław Jan Szmit of Szkółka Szmit spoke enthusiastically of his new introduction: "Lime Monster displays well with perennials, with its large leaves giving an exotic feeling. Young leaves are a fresh lime green, and, in autumn, leaves develop a rusty red tinge". Weigela are particularly popular in Poland in home gardens, and used widely in landscaping and public greenery.



The slogan of Green is Life 2018, 'Collection of Benefits' recognises the multiple functions that plants have in our lives. All plants in the Air so Pure range are selected for their ability to remove environmental pollutants from the air, a claim backed by research from Wageningen University. Consumers can now check this for themselves with the range of indoor air quality monitors now readily available. The Air so Pure stand won a Bronze Laurel award in the competition for most attractive stand.

Innovations in horticulture are often about a new story behind a known product. Ekote is an example: a controlled release fertilizer granule that performs much the same as comparable products already on the market. The innovation is in how Ekote is made. The coating is a novel organic-based polymer that naturally and predictably degrades over time. In addition, innovative strategies in production processes reduce costs by 30% through savings in labour and energy expenses.





"More popular than bread!" laughs Anna Panek of Panek nursery. In one of the supermarket chains in Poland, Sunbeckia® sold more units this summer than bread. It was, however, ineligible for the Plant Novelties competition at Green is Life, because the rules of this competition require all entries to be fully hardy in Poland's climate.



Of the 23 entries in the Plant Novelties competition, 4 were vertically compact trees highly suitable for small urban spaces: two varieties of Betula, and two of Cercis. The attractive columnar habit of Betula pendula Fastigiata Joes 'Jolepi' won the variety a silver medal, and Cercis The Rising Sun was awarded a silver medal in appreciation of its coloured leaves, ranging from a pinky-orange to fresh light green.

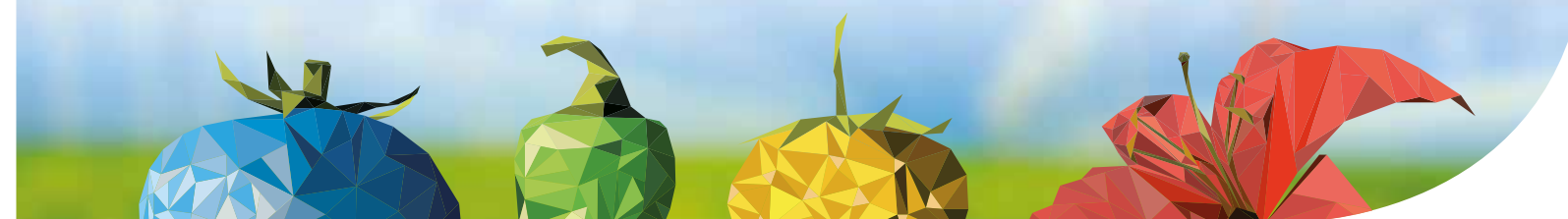
Ecuadorian roses are popular in Russia, where consumers have high regard for quality, and are prepared to pay appropriately. Although Polish markets are more price sensitive, demand for luxury goods is increasing parallel with steady economic growth. Currently, Poland has the fourth fastest developing economy in EU. Tessa, one of the three largest Ecuadorian rose producers, is confident that their 85 varieties of high quality roses have a place in Polish markets.



Responding to the increasing popularity of perennials in the Polish market 7 entries were attractive perennials, each with their own distinctive feature. Monarda 'Bee Pretty,' with unique elongated flowers and improved resistance to mildew won an award of distinction. Plants are compact and highly floriferous. Monarda 'Bee Pretty' is suitable for perennial flower beds, and is attractive to pollinators.



GreenTech
HORTICULTURE'S FOREFRONT
TRADE SHOW 11-12-13 JUNE 2019



SAVE THE DATE

TRADESHOW 11-12-13 JUNE 2019

From now on, GreenTech Amsterdam is an annual show. The next edition is to be held on 11 - 13 June 2019.

A total of 10,465 professionals from 112 countries visited GreenTech 2018: more than half the visitors came from outside the Netherlands and the number of multinationals that attended increased.

WHAT VISITORS SAID ABOUT GREENTECH

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ABOUT GREENTECH

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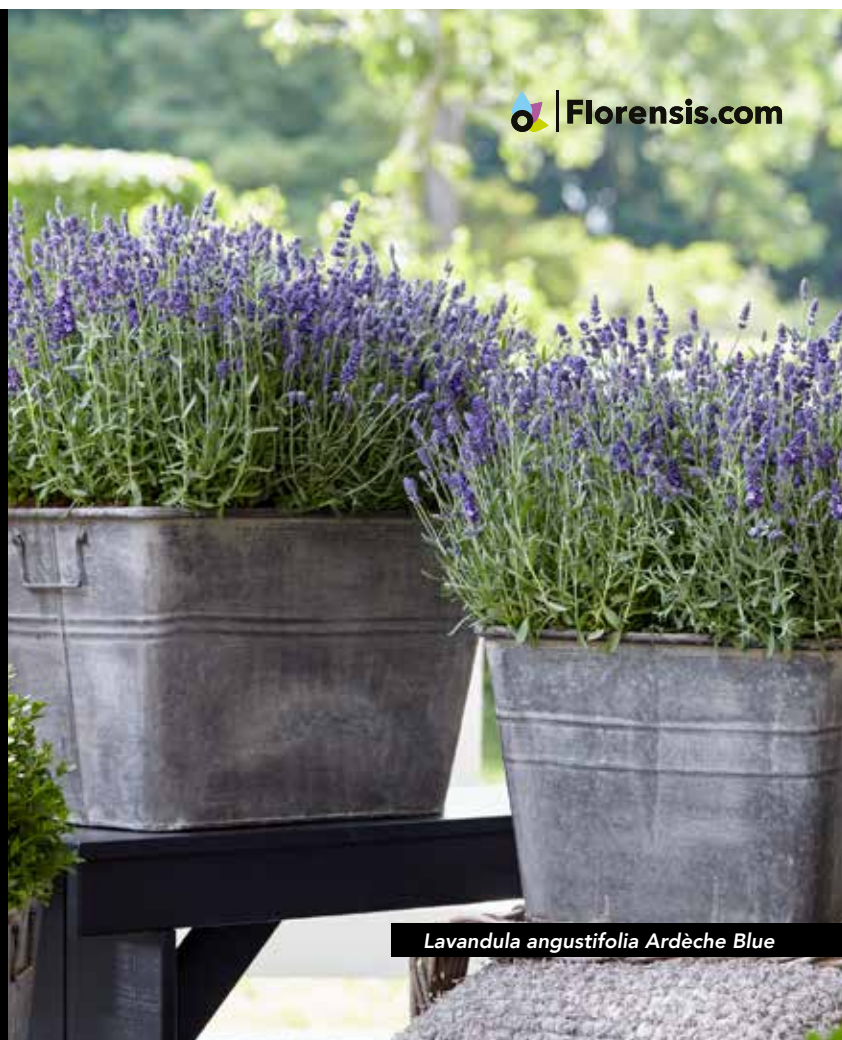
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THE NETHERLANDS

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European Mineral Fertiliser Summit in Amsterdam
www.acieu.net

TURKEY

28 NOVEMBER TO 1 DECEMBER 2018

Growtech Eurasia, international greenhouse, agricultural equipment and technology trade fair in Antalya, Turkey.
www.growtech.com.tr

THE NETHERLANDS

4-5 DECEMBER 2018

Breeders & Young Plant Producers Conference
www.fleuroselect.com

UNITED STATES

4-6 DECEMBER 2018

Great Lakes Expo and Michigan Greenhouse Growers Expo at DeVos Place Convention Center, Grand Rapids.
www.glexpo.com

UNITED STATES

16-18 JANUARY 2019

Tropical Plant Industry Exhibition (TPIE) at the Broward County Convention Centre, Ft. Lauderdale.
www.tpie.org

GERMANY

18-27 JANUARY 2019

Grüne Woche, international green week Berlin. The world's largest consumer and trade fair for food, agriculture and horticulture.
www.gruenewoche.de

GERMANY

22 JANUARY 2019

Recognising the very best of the best in the horticultural industry, the 10th International Association of Horticultural Producers (AIPH) International Grower of the Year (IGOTY) Awards 2019 is taking place at the IPM fair-ground on Tuesday 22 January 2019 in Essen, Germany, alongside IPM Essen 2019.
www.aiph.org/groweroftheyear/

Myplant & Garden 2019 will be fun and filled with inspiration

MILAN, Italy: The fourth edition of Myplant&Garden (February 20-22, 2019 Fiera Milano Rho-Pero) is expected to feature 700 exhibitors, showing off their latest products and services on a 45,000m² exhibit space. Visitors to the 3-day event will experience a much expanded exhibition, conference and workshop programme, very closely focused on the key issues affecting the ornamental horticulture and gardening industry

With less than 3 months away, the 2019 edition of Myplant&Garden already promises to be packed with new ideas, novelty plants and information with a strong focus on biodiversity, sustainability and the commercial production of ornamental plants. The organisers have segmented the exhibit halls into eight main categories to enable buyers to shop for products and services efficiently. The product areas are home nursery stock, cut flowers, home décor, pots and containers, machinery, garden maintenance, landscaping and services. Set to be a popular attraction for attendees, the Garden Centre Experience pavilion

will feature new trends and merchandising concepts for the garden retail industry. Debuting next year will be an area dedicated to sports-grounds. Hall 12 will be home to a buyer's lounge, while hall 20 includes two conference areas to welcome the many professionals participating in seminars and workshops. The show's novelty showcase is a dedicated area to novelty flowers and plants and is closely linked to the Myplant & Garden Awards. In turn, the Flower Boutique is set to provide inspiration for retail florists. Its exclusive pavilion will be a blaze of colours. On display will be new merchandising solutions, accessories and products for small and medium sized florists.

GERMANY

22-25 JANUARY 2019

IPM ESSEN
ipm@messe-essen.de
www.ipm-essen.de

GERMANY

25-29 JANUARY 2019

The Floradecora show will display interesting ways to blend fresh cut flowers, pot plants and home décor accessories. Floradecora will be held in conjunction with Christmasworld in Frankfurt, one of the world's largest consumer goods trade shows.
www.christmasworld.messe-frankfurt.com

GERMANY

6-8 FEBRUARY 2019

Fruit Logistica Berlin, the world's leading trade fair for the fresh fruit and vegetable business.
www.fruitlogistica.de

ITALY

20-22 FEBRUARY 2019

Myplant&Garden at Fiera Milano.
www.myplantgarden.com

POLAND

21-23 FEBRUARY 2019

Gardenia, horticultural trade exhibition in Poznan.
www.gardenia.mtp.pl

ETHIOPIA

13-15 MARCH 2019

Hortiflora Expo Addis Ababa.
www.hpp.nl

VIETNAM

13-15 MARCH 2019

Hortex Vietnam 2019 at the Saigon Exhibition and Convention Centre (SECC) in Ho Chi Minh City.
www.secc.com.vn

CHINA

17-19 MARCH 2019

China International Floriculture & Horticulture Trade Fair at Guangzhou's International Sourcing Centre Complex.
www.flowerexpochina.com

THE NETHERLANDS

21 MARCH 2019

TO 19 MAY 2019

Keukenhof, one of the world's most beautiful spring gardens.
www.keukenhof.nl

UNITED STATES

20-22 MARCH 2019

World Floral Expo in Dallas.
www.hpp.nl

CHINA

20-22 APRIL 2019

Hortiflorexp IPM China
www.hfexpo.org

IRAN

25-27 APRIL 2019

Iran Green Trade Fair at Iran's International Permanent Fairground
www.hpp.nl

CHINA

29 APRIL 2019 TO 7 OCTOBER 2019

World Horticultural Exposition in Beijing
www.horti-expo2019.org

FRANCE

8-19 MAY 2019

Floralies, the 12th edition of the Floralies Nantes will take place at the Parc de la Beaujoire Convention Centre in Nantes.
www.comite-des-floralies.com

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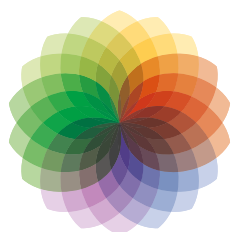
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