

# UGAFLO

ADDRESSING

2

STANDARDS AND ETHICS  
AND MARKETING

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LAUNCHING OF THE  
RESEARCH AND DEVELOPMENT  
CENTRE

0

11TH & 12TH SEPTEMBER AT NSIMBE ESTATES



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# UGAFLOR 2000 ANNUAL FLOWER CONFERENCE

**DATE:** 11-12th September 2000

**VENUE:** UFEA Research and Training Farm, Nsimbe

**THEMES:** Day 1 - Standards, Ethics and Future Marketing  
Day 2 - Research and Training for the Future

## PROGRAMME

### Day 1 - Monday September 11th

- |                 |                                                                                                                                                       |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8.00 - 9.15am   | Registration                                                                                                                                          |
| 8.30 - 9.15am   | Viewing of Exhibition and trade stands                                                                                                                |
| 9.30 - 10.00am  | Opening Speeches - Dr Kisamba-Mugerwa, Minister of Agriculture, Animal Industries and Fisheries, Mr Stanley Mulumba, UFEA, and Mr Mahmood Hudda, UFEA |
| 10.00 - 10.20am | Presentation: Review of the Ugandan Floriculture Industry 1993-2000,<br>By Dr Stephen New (USAID/IDEA Project)                                        |
| 10.25 - 10.45am | Presentation: European Rose Import Figures and Trends, 1995-2000<br>By Mr David Gray (Pathfast Publishing)                                            |
| 10.45 - 11.15am | Presentation: Past and Future Factors affecting Sweetheart Rose Quality<br>By Mr Peter Bouma (BVH)                                                    |
| 11.15 - 11.35am | Coffee break                                                                                                                                          |
| 11.40 - 12.00pm | Presentation: Future Trends in the Marketing of Sweetheart Roses in Europe<br>By Mr Simon van der Berg                                                |
| 12.05 - 12.25pm | Presentation: Global Trends in Flower Marketing<br>By Ms Debbie Hamrick (Floriculture International)                                                  |
| 12.30 - 2.20pm  | Lunch                                                                                                                                                 |
| 2.25 - 2.45pm   | Presentation: MPS Certification for African Flowers<br>By Ms Marie Ornon (MPS)                                                                        |
| 2.45 - 4.00pm   | Panel question session and general discussion<br>Moderator: Umran Kaggwa (USAID/IDEA Project)                                                         |
| 4.00 - 4.15pm   | Closing Summary, Stanley Mulumba, UFEA                                                                                                                |



## Day 2 - Tuesday September 12th

8.00 - 9.15am	Registration
9.30 - 9.50am	Presentation: Design and Objectives of the UFEA Research Trials By Mr Jan Krul & Dr Steve New (UFEA/IDEA Project)
9.50 - 11.15am	Coffee and viewing of trade stands by all conference participants.
10.15-11.15am	Official Opening and tour of R&TC by Hon. Brig. Moses Ali, Second Dep. Prime Minister and Minister of Tourism, Trade and Industry; Hon. Gerrit Ybema, Netherlands Minister for Foreign Trade; Dr Kisamba-Mugerwa, Minister of Agriculture; and Mr Martin Brennan, Ambassador of the USA
11.15 - 11.45am	Opening speeches by Hon. Brig. Ali , Hon. Ybema, Mr Brennan and UFEA Officials.
11.45 - 2.00pm	Tours of trial greenhouse for all conference participants
12.30 - 2.00	Lunch
2.00 - 2.20pm	Presentation: IPM techniques for Floriculture By Mr Marinus van de Vrie (Consultant)
2.25 - 2.45pm	Presentation: Farm-to-Market Temperature Monitoring of Ugandan Roses By Dr Christopher Bishop (Writtle College, UK)
2.45 - 3.05pm	Presentation: The Ugandan Code of Practice for Floriculture & Horticulture By Steven Humphreys (USAID/IDEA Project)
3.05 - 4.15pm	Panel questions and general discussion Moderator: Peter Benders (Van Zanten)
4.15 - 4.20pm	Closing Summary by Mahmood Huddah, UFEA Chairman
4.20 - 5.30pm	Cocktails

- Notes:
1. All guests must register on arrival at the farm in order to obtain meal tickets
  2. Medical assistance is available from Reception if required.
  3. Regular buses will be provided throughout the day between hotels and the farm



# Ugaflor 2000

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Dear Ugaflor 2000 guest,

A warm welcome to Uganda!

Our Entebbe Airport reception team is here to assist you. If you have already made your hotel arrangements, the team will guide you towards your hotel's courtesy shuttle. In case you have not decided where to stay, you will be provided with a list of Kampala's leading hotels and their special rates for the guests of Ugaflor 2000.

A copy of Ugaflor 2000 program is enclosed. Minor last minute amendment may be found necessary, yet it will not alter the program's timing.

A convenient shuttle transport will be available for the duration of the program, i.e. 11 and 12 September at the following daily timetable. (Departure will be from the parking lot of Kampala Sheraton to Ugaflor 2000 venue at Nsimbe Estates - 24 km on Kampala / Masaka Highway - and vice versa). If you will be staying at another hotel, please make your own transport arrangements from your hotel to the Sheraton and back.

## *Shuttle Departure time from Kampala to Ugaflor 2000:*

- (1) 07.30
- (2) 08.00
- (3) 08.30
- (4) 10.00
- (5) 11.00
- (6) 12.00

## *Shuttle departures from Ugaflor 2000 to Kampala:*

- (1) 16.30
- (2) 17.00
- (3) 17.30

More information will be provided upon your arrival to Ugaflor 2000 venue. However, if you need urgent information, or in case of emergency, please do not hesitate to contact our Executive Secretary Miss Flavia Ntambi, mobile phone 077-420379.

Wishing you a very pleasant stay in Uganda.

*Uganda Flower Exporters Association*



# UGANDA FLOWERS EXPORTERS ASSOCIATION SECTOR PROFILE

## A THE ORGANIZATION

The Uganda Flowers Exporters Association (UFEA) was established in 1995 as an umbrella Organization bringing together all the stakeholders in the flower Industry in Uganda. It is through the Association that efforts to influence Government policies that affect the industry can be effected.

UFEA was incorporated in 1995 a non-profit making entity and its members are bound, by the Association's Constitution and Code of Conduct. The association is a legal entity in its own right, and can sue and be sued as such.

## B VISION

To build internationally recognized capacity in the field of flower exports in Uganda.

## C MISSION

To serve as Uganda's center of excellence in establishing and maintaining best-in-class professional standards in the areas of variety, quality, purchasing, packaging, exporting and value-added marketing.

## D GOALS AND OBJECTIVES

- Acquisition of International profile.
- Diversification from roses to other types of flowers.
- Membership growth and retention.
- Greater coordination with interfacing Government and Non- Government agencies.
- Continued donor support and cooperation
- To represent the interests of all the flower exporters in Uganda
- To bridge the gap between Government and the flower exporters
- To seek recognition, co-operation and support of other exporters' associations in Africa and other international institutions concerned with the floriculture industry.
- To promote flower growing and the floricultural industry in Uganda.
- To encourage, assist/support members to succeed in their business enterprises and to help them acquire information in the successful development of their flower export business.
- To encourage, promote and protect the interests of the members and of other persons who are interested or concerned with the flower business by ensuring that proper standards and business ethics are maintained throughout the trade and to take in consultation with the members of the Association such measures as designed to achieve this objective.



- To discourage unfair competition without interfering with members' initiative in trade.
- To promote friendly relations and co-operation among the members of the Association.
- To provide machinery for consultation and negotiation between the Association and other organisations, Government and/or constitutions concerned with the development of the floriculture industry in Uganda.
- To advise the Government from time to time of developments of the floriculture industry both locally and internationally.
- To do all such things as are conducive for the better attainment of the objectives of the Association.

## **E ACHIEVEMENTS**

The Association represents the most vibrant industry, in the non-traditional agricultural export sector. The flower industry contributes about US\$ 17 million of export value and is the fastest growing non-traditional agricultural export sector. Government has already acknowledged the importance of enhanced export base of the economy, through strengthening of non-traditional agricultural export projects. Hence, in the bid to achieve this target, the flower industry is forging a strong Association to co-ordinate the implementation of its crucial activities.

## **F PRODUCTION INFORMATION**

Area under production 1999/2000:  
*85 hectares*

Total investment to date in the Ugandan Flower Industry  
*Over US \$ 40,000,000*

Estimated average production for 1999/2000 :  
*3,000 tonnes of roses and cuttings*

Estimated Gross return for the year 1999/2000  
*US \$ 30,000,000 c&f*  
*US \$ 17,000,000 fob*

Number of employees:  
*Over 4,000 people*

## **G DESTINATIONS**

Dutch Auctions about 80%  
**Others:** Norway, Germany, Sweden, United Kingdom, and France (Direct Sales)



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**Contact Person:**

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**Contact Person:**

Mr. Vincent Ssenyonjo

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**Contact Person:**

Mr. Pim de Witte



## **Presenter profiles-Ugaflor 2000**

### **Dr Stephen New**

Steve has 20 years experience in research, development and marketing of fresh and processed products, in Africa, Asia and the Caribbean. Since 1995 he has been working with the USAID funded IDEA project as the advisor on high value crop production and marketing. Prior to this he was based in the Caribbean for 8 years, firstly as General Manager of the Caribbean Agricultural Trading Company (CATCO), exporting a range of fresh and processed products, and tropical flowers to Europe and North America, then as Project Manager for the USAID funded Tropical Produce Support Project. He is a director of international food and agriculture consultants Fintrac and Food Surveys, with offices in Birmingham, UK and Washington DC, USA. During his time in Uganda he has worked closely with the flower industry, particularly on selecting suitable varieties and setting up the UFEA Research and Development and Training site.

### **David Gray**

After some 20 years involvement in agricultural and horticultural seeds in the UK, Zambia, and Brazil, Mr Gray came to Kenya in 1981 as Brook Bond Kenya's Director of Horticulture, responsible principally for the Sulmac operations, as well as Dwa Sisal Estate, Brook Bond's coffee estates and Murphy Chemical (East Africa) Ltd.

He took early retirement from Brook Bond in 1994, since when he has been working as a horticulture consultant, including a 2 year assignment with the Fresh Produce Exporters Association of Kenya during which he was instrumental in setting up the Association's Code of Practice. He now works as an independent consultant based in Nairobi, in close collaboration with Pathfast Publishing (UK) and also writes reports on East and Central African floriculture for a number of international magazines

### **Peter Bouma**

Peter has been working for BVH for 6 years. He started as the area manager for Africa, based in Nairobi, and he now operates from head office in the Netherlands. He has a BSc degree in Horticulture and Marketing.

### **Mr. Simon Van der Berg**

Simon is one of the pioneers of flower exports from East Africa. He started as a grower in Kenya more than twenty years ago and was instrumental in setting up several of the largest flower production enterprises. In 1992, he established East African Flowers in Holland, with the specific objective of improving the market returns for flowers grown in Kenya and other African countries. When the Dutch auction put restrictions on African imports in 1994, Mr. Van der Burg started the Teleflower Auction (TFA); the first independent auction for imported flowers. The TFA was also the first to sell its products through computer links enabling buyers to see and buy flowers on a screen in their own offices. These innovations have now been adopted by other auctions and major importers. For the last two years, Simon has been involved in production and marketing of roses in East Africa.

### **Debbie Hamrick**

Debbie is editor of Floraculture International magazine which circulates to more than 13,000 growers and other floriculture industry leaders and professionals in more than 140 countries worldwide. As the



founding publisher and editor of Floraculture International in November 1990, Debbie has travelled to 27 countries worldwide to cover the floriculture industry.

She has served as Editorial Director for Ball Publishing, owners of Floraculture International, and publishers of GrowerTalks magazine for American and Canadian greenhouse growers, Green Profit magazine for American mass marketers, home centre stores and garden centres and Seed Trade News, for the world wholesale agricultural seed industry. Debbie is a graduate of North Carolina State University, Raleigh, where she earned a BSc degree in Horticulture/Floriculture with a concentration in Agricultural Economics.

### **Marie Ornon**

Marie has a M.Sc in Agriculture, part of which included work on a Kenyan flower farm, where she assisted them in meeting MPS requirements. After graduating in December 1999, she returned to Kenya as MPS co-ordinator for East Africa. She recruits and registers new participants, and mediates between growers and MPS headquarters in The Netherlands.

### **Marinus van de Vrie**

M. van de Vrie has been employed by the Research Institute for Plant Protection in Wageningen (The Netherlands). He conducted research on biological control of the fruit tree red spider mite (*Panonychus ulmi*) in fruit growing. The study resulted in a general accepted biological control system. He also studied biological control of mite and insect pests in floriculture in The Netherlands.

He was invited by the University of California to study mite and insect pests on citrus, and by the University of Florida to develop a biological control system of spider mite on strawberry.

For the Netherland Management Cooperation Programme he developed control program on ornamental and vegetable crops in several developing countries.

### **Dr Chris Bishop**

Chris is currently head of Writtle International, the consulting arm of Writtle College, near Chelmsford, UK. As well as consultancy assignments in various countries (Zambia, Kenya, Bangladesh, Sri Lanka, Egypt) he also lectures in post harvest handling at the college. He is used as an independent expert witness in assessing claims to insurance companies, for losses incurred on perishable shipments during transit. Prior to Writtle, he lived in Mexico for several years, advising on post harvest handling in their fresh produce industry. He is currently contracted to the IDEA project, to carry out research on how to improve the maintenance of the cold chain between the greenhouse and the end user, as well as advise on how to improve vase life by using the correct holding solutions.

### **Steven Humphreys**

Steven is an agribusiness specialist with more than 15 years experience in production, shipping and marketing in Africa and Europe. He is currently a high value horticultural advisor on the ADC/IDEA project in Kampala. Prior to this he was a resident consultant with COLEACP in Paris, where he assisted in the planning and implementation of programs to improve quality from ACP horticultural exporters into the EU. From 1995 to 1998 he was Chief Executive of the Zambia Export Growers Association (ZEGA) during which time fresh horticultural exports grew from \$12 million to \$38 million. Before working in Zambia, he was a trader for one of the UK's largest fresh produce importers. Steven is a graduate of Wye College, University of London, and the University of Kent.



REVIEW OF THE UGANDA FLORICULTURE INDUSTRY 1993-2000

Presented by Steve New,  
Agribusiness Development Centre (ADC)

Funded by USAID through the Investment in Developing Export Agriculture Project  
(IDEA)

September 2000



### 1993/94

- First flower farms established
- Mainly roses but small production of leather leaf fern
- Production systems and variety selection based on Kenya
- First Red, Prophyta and other hybrid tea varieties predominate
- Prices high - Dfl 0.40/stem and up
- Dfl1.80 = US\$1.00
- Uganda Flowers Exporters Association (UFEA) formed in 1994

### 1995

- Rapid expansion of industry through establishment of new rose farms
- First limonium exports
- Average farm size 2-3 hectares
- Many varieties introduced
- ADC study showed roses to be a profitable crop but more attention to quality needed
- Dfl 1.61 = Us\$1.00
- Trials start with chrysanthemum and saintpaulia cuttings, amaryllis bulbs and other cut flowers
- First commercial exports of limonium flowers

### 1996

- Number of rose farms increases to 14 with some expansion of existing farms
- Total rose production exceeds 1,300 tonnes (50+ million stems) - three times 1994 level
- Export of leather leaf fern abandoned
- Ugandan roses sold at relatively low prices due to inconsistent quality



- First commercial exports of chrysanthemum and sauntpaulia cuttings
- Ugaflor 96
- Dfl1.69 = US\$1.00

### 1997

- Several new farms established but others struggling to operate profitably
- Rose exports continue to increase in quantity to 1,900 tonnes
- Increase in quality problems continues to affect sales
- Rose growers start to replant with sweetheart varieties
- First course in Applied Tropical Floriculture completed
- Limonium exports abandoned
- Ugaflor 97
- Dfl 1.95 = US\$ 1.00

### 1998

- Export volume of roses drops
- Two rose farms go into receivership and others in trouble
- Independent analysis by the ADC shows that half of the 75 ha of roses are not viable
- Main problem is low productivity of some original varieties in Uganda
- Chrysanthemum cuttings doing well
- Saintpaulia exports abandoned
- Second annual course in applied tropical floriculture completed
- Ugaflor 98
- Dfl 1.98 = US\$ 1.00



## 1999

- Export of roses increases again to 2,000 tonnes
- Some growers achieve production of more than 350 stems/m<sup>2</sup>
- Prices for Ugandan roses improve
- Export of chrysanthemum cuttings increases to 400 tonnes and yields reach 3,000/m<sup>2</sup>
- Freight and handling problems intensify at Entebbe
- Third annual course in applied tropical floriculture completed
- First draft of Uganda national code of practice produced
- Dfl 2.07 = US\$ 1.00

## 2000

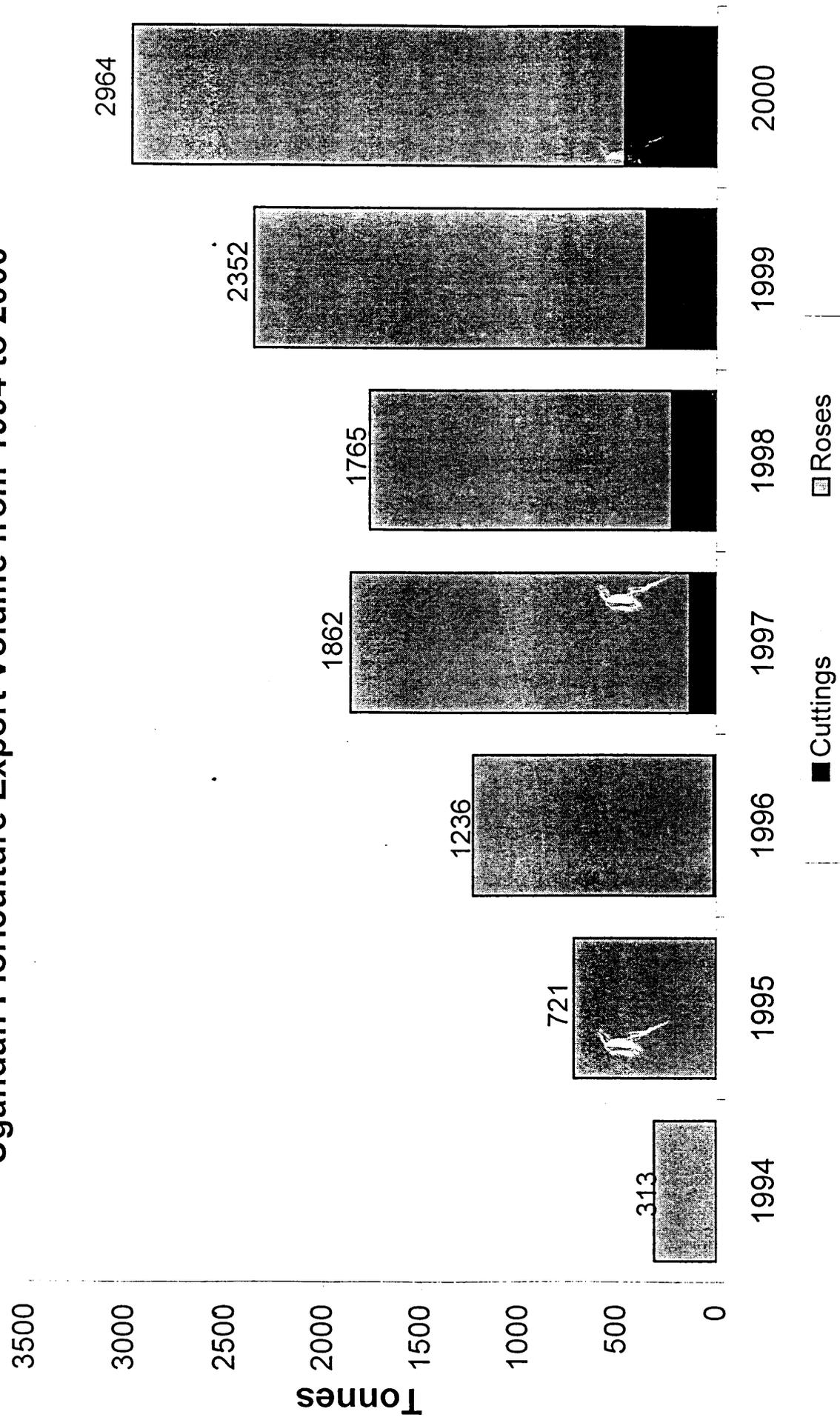
- Exports of roses and cuttings expected to reach 3,000 tonnes, with an FOB value of \$17 million
- Guilder drops to Dfl 2.45 to \$1.00
- Flower and fresh produce exporters form a new company, Fresh Handling, to improve handling of perishables at Entebbe and charter aircraft
- Fourth training course in applied tropical floriculture
- Third draft of national code of practice for floriculture
- UFEA research and training facility established
- Ugaflor 2000

## 2000 - 2003

- Floriculture exports expected to increase by at least 50% through increases in productivity and area under production
- Continued cooperation between growers, breeders and buyers
- Diversification into new varieties
- More audits and ethical certification of growers
- Additional cold storage and handling facilities at Entebbe



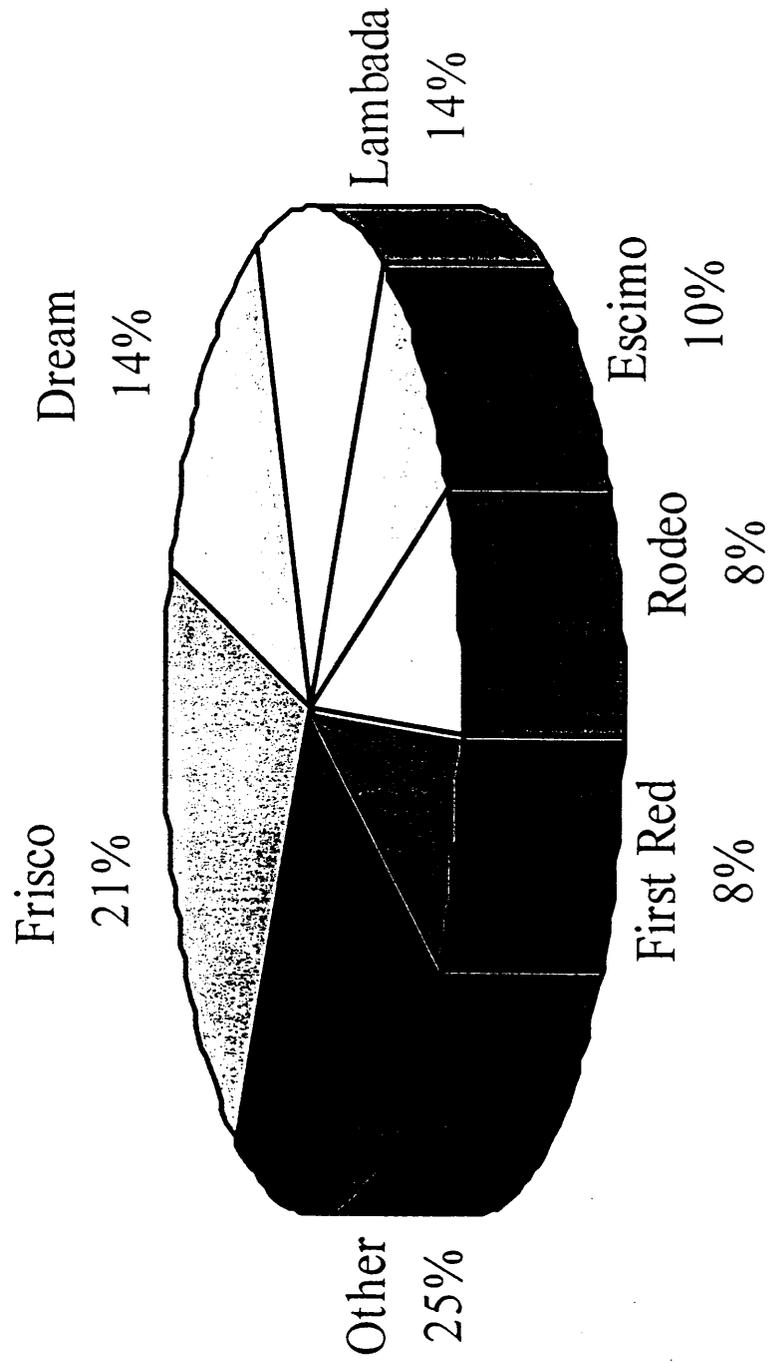
# Ugandan Floriculture Export Volume from 1994 to 2000





# Uganda Flor 2000

Export Share of Rose Varieties from Uganda, 1999-00

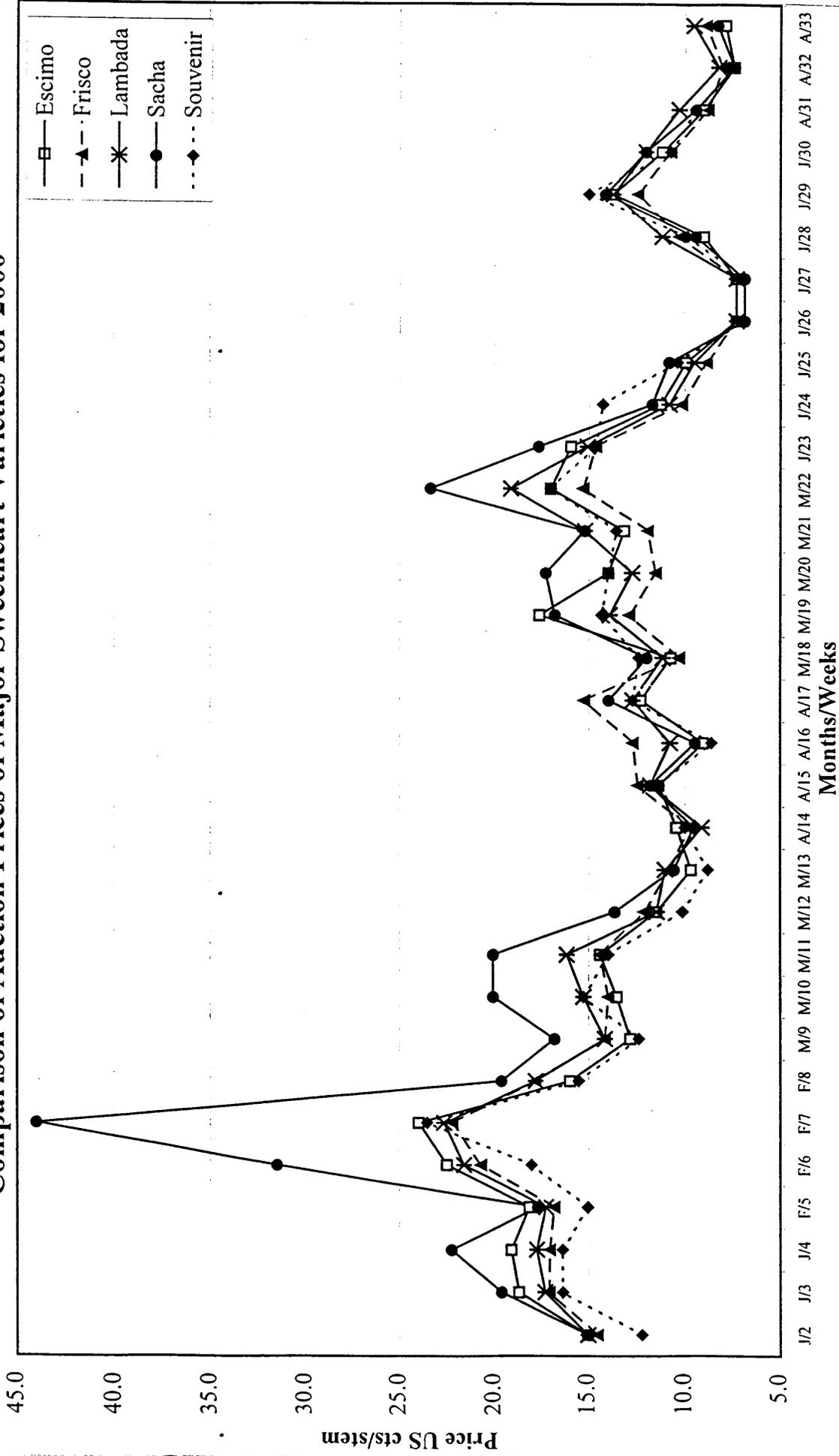




<b>Comparison of Export Volumes of Major Rose Varieties 1998-2000</b>			
	Sept98-May99	Sept99-May00	% change
<b>Sweethearts</b>			
Frisco	14,337,985	19,683,504	37%
Dream	7,082,024	13,366,882	89%
Lambada	8,197,393	13,045,491	59%
Escimo	2,244,624	9,487,820	323%
Rodeo	13,042,960	7,654,605	-41%
Souvenir	7,948,872	4,926,918	-38%
Sacha	2,745,940	3,225,311	17%
Golden Gate	560,920	2,401,120	328%
<b>T-hybrids</b>			
First Red	9,955,904	7,716,837	-22%
Konfetti	674,340	2,151,520	219%
Europa	1,668,500	1,388,283	-17%
Aals Gold	1,003,800	304,821	-70%
Prophyta	187,956	-	-100%
<b>Total Hybrids</b>	<b>16200743</b>	<b>15015614</b>	<b>-7%</b>
<b>Total Sweethearts</b>	<b>60331868</b>	<b>79416209</b>	<b>32%</b>

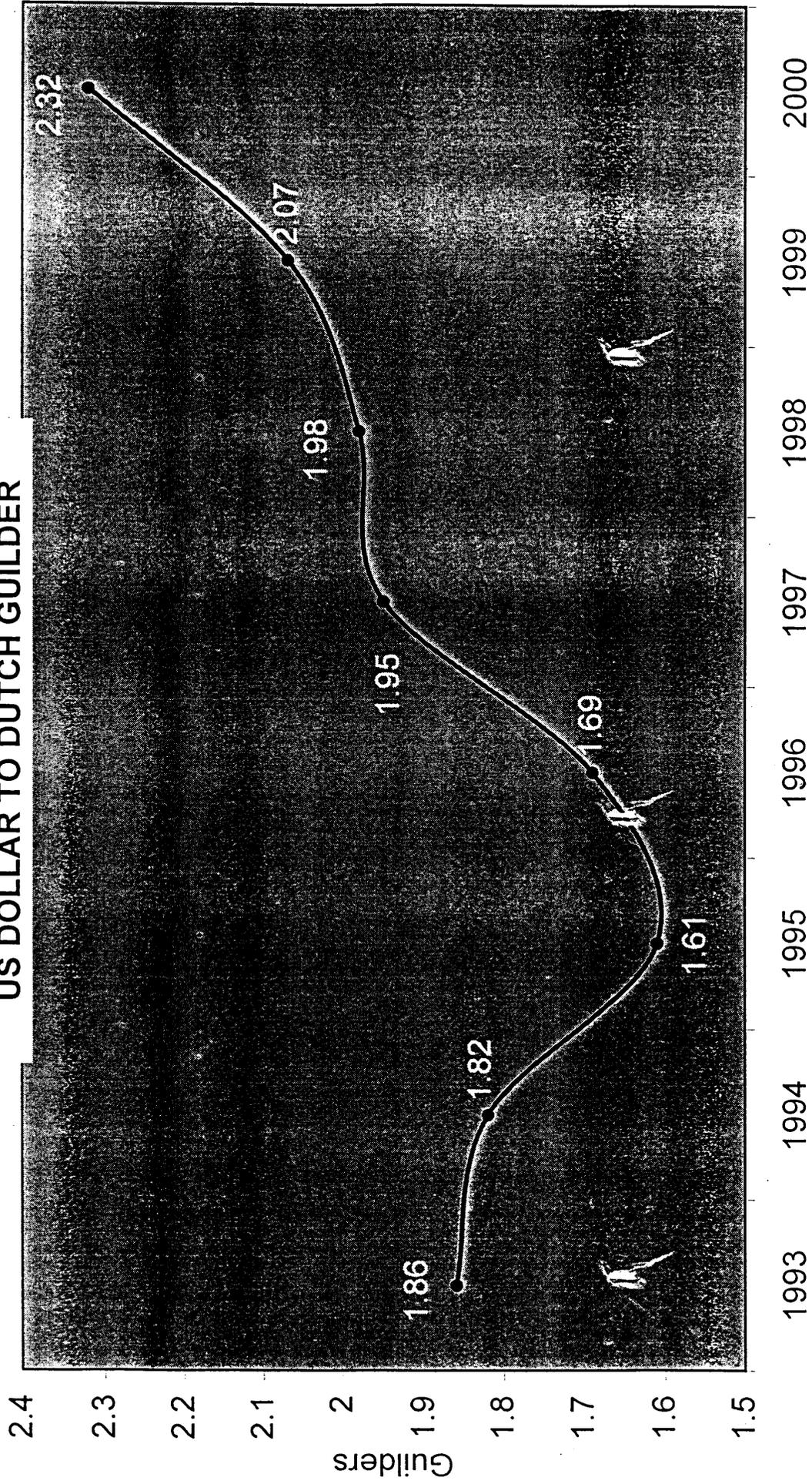


# Comparison of Auction Prices of Major Sweetheart Varieties for 2000





# TREND OF FOREIGN EXCHANGE RATES, US DOLLAR TO DUTCH GUILDER



Source: Olsen Exchange Converter



# EUROPEAN ROSE IMPORTS – RECENT TRENDS

*By D.H. Gray*

- Holland and the Dutch Auction remains the centre of the flower industry
- Roses are the leading cut flowers in the international trade
- Sales of Roses through the Dutch Auction continue to increase at above the average rate
- Floral traditional markets are mature and stagnating thus new market outlets and systems need to be explored
- Percentage of imported flowers is increasing
- Average prices of flowers are on a downward slope



## EUROPEAN ROSE IMPORTS – RECENT TRENDS

- Price difference between Dutch flowers and imported flowers is widening
- Imported produce is subject to customers concern over environment and social issues
- Many new varieties are launched onto the market every year but with “low grade”
- There is a distinct shift towards **READY FOR SALE** product
- Freight is still the major cost
- Choice of variety is the most important decision



# VARIETY TRENDS

## *What does the grower want?*

- High return to farm gate
- Good quality: stem, leaf and flower
- Resistance to diseases
- Good colour – that does not fade
- High yields
- No disbudding
- Ease of handling – thornlessness
- Resistance to damage in transit
- Good pack rate



# VARIETY TRENDS

## *What does the consumer want?*

- Good colour
- Ability to take up water easily and reliably
- Quality in form of: size, length of stem and size of flower
- Fragrance
- Freshness and vase life
- Leaf quality
- Ease of handling
- Thornlessness
- Previous knowledge of variety and source
- To be able to charge a high price knowing that the bloom is of good quality for the money



## ROSES POPULARITY LEAGUE

### SMALL/MEDIUM VARIETIES

(Dutch Auctions: Imports only)

Variety	97	98	Dfl	99	Dfl	%	(cf Total)
Frisco	4	4	25	1	22	23	1
Mercedes	1	1	26	2	24	75	6
Lambada	3	3	23	3	23	60	4
Jaguar	2	2	28	4	26	97	11
Jazz	15	7	28	5	25	41	7
Golden Gate	23	15	31	6	29	29	5
Rodeo	5	5	23	7	24	52	10
Sacha	9	9	23	8	24	13	2
Golden Times	6	6	26	9	25	100	*
(mixed	-	-	21	10	25	91	*)
Eskimo	11	10	25	11	26	11	3
Amore	20	12	23	12	22	39	13
Maasai	17	8	24	13	25	86	*
Dream	21	16	25	14	24	36	16
Kiss	13	18	23	15	23	28	14
Gabrielle	8	11	30	16	28	24	12

(Source: Pathfast Publishing/VBN Stats)

dhg 8/2000



## ROSES COLOUR MIX & AVERAGE PRICES

(DUTCH AUCTIONS 1998)

<u>COLOUR</u>	<u>%</u>	<u>AV.PRICE (Euro)</u>
RED	30	.22
YELLOW	21	.16
PINK	15	.16
ORANGE	10	.18
WHITE	8	.21
SALMON	7	.18
PURPLE	2	.16
BICOLOUR	2	.24
CREAM	1	.20
MIXED	1	.10
<u>AVERAGE</u>		<u>.19 (APPROX.Dfl .37)</u>

(Source: Pathfast Publishing/VBN stats)

d h g 8/2000



## ROSE SALES BY MONTH

(DUTCH AUCTIONS 1998)

SMALL/MEDIUM VARIETIES

<u>MONTH</u>	<u>%</u>	<u>Dfl*</u>
Jan	5.3	.42
Feb	6.0	.51
Mar.	7.7	.31
Apr.	8.6	.33
May	9.7	.35
Jun.	10.8	.29
Jul.	10.1	.24
Aug.	9.3	.26
Sep.	9.7	.29
Oct.	8.3	.33
Nov.	7.8	.26
Dec.	6.9	.29
<u>Average</u>		<u>.32</u>

(N.B. \* prices calculated from Euro @ 2.2)

(Source Pathfast Publishing)

d h g 8/2000



## ROSES POPULARITY LEAGUE

### SMALL /MEDIUM VARIETIES

(Dutch auctions; all sales)

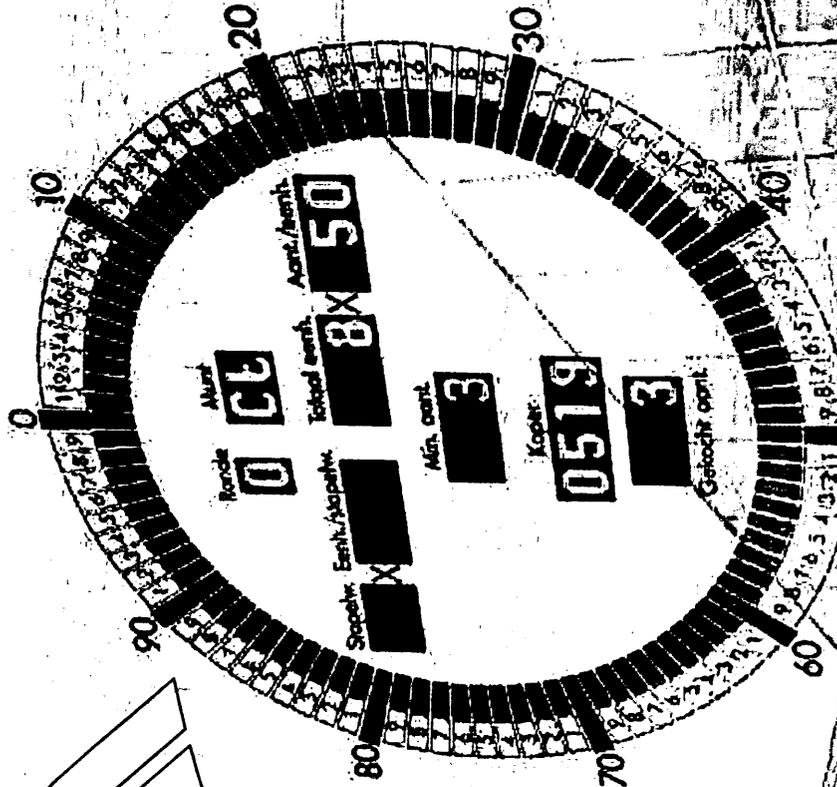
Variety	92	95	98	99
Frisco	1	1	1	1
Sacha	-	14	2	2
Eskimo	6	2	3	3
Lambada	13	6	4	4
Golden Gate	-	-	11	5
Mercedes	3	4	5	6
Jazz	-	58	9	7
Surprise	98	18	6	8
Candid Prophyta-		-	16	9
Rodeo	94	11	8	10
Jaguar	9	8	11	11
Gabrielle	7	5	7	12
Amore			10	13
Kiss	4	3	12	14
Tina	59	17	15	15
Dream	-	25	14	16
Motrea	2	7	17	21
Safari	89	10	29	29
Souvenir	10	9	24	31
Europa	5	12	23	36

(Source: Pathfast Publishing/VBN Stats.)

dhg 8/2000



# BRUNNEN



Quality & Accuracy

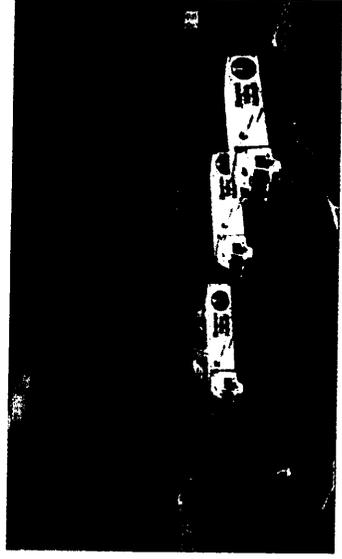




# Mission & Goal

Goal: Realising an optimum price setting for products of suppliers for the short and long term.

Mission: Organising an excellent marketplace for producers and traders of floricultural products





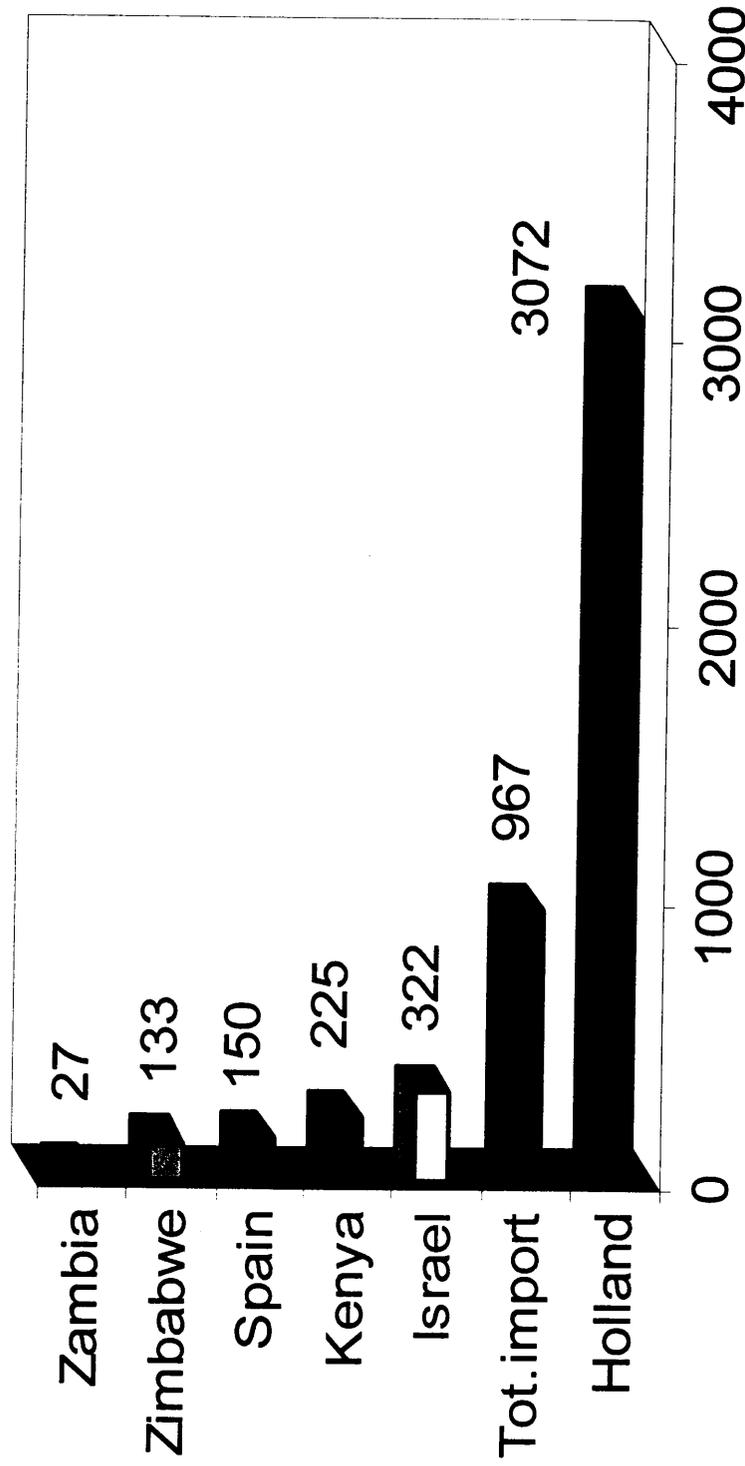
# Figures

- Turnover: 2,6 billion guilders
- Marketshare: 38,5 %
- 5.600 suppliers
- 1.750 employees
- 2.500 buyers





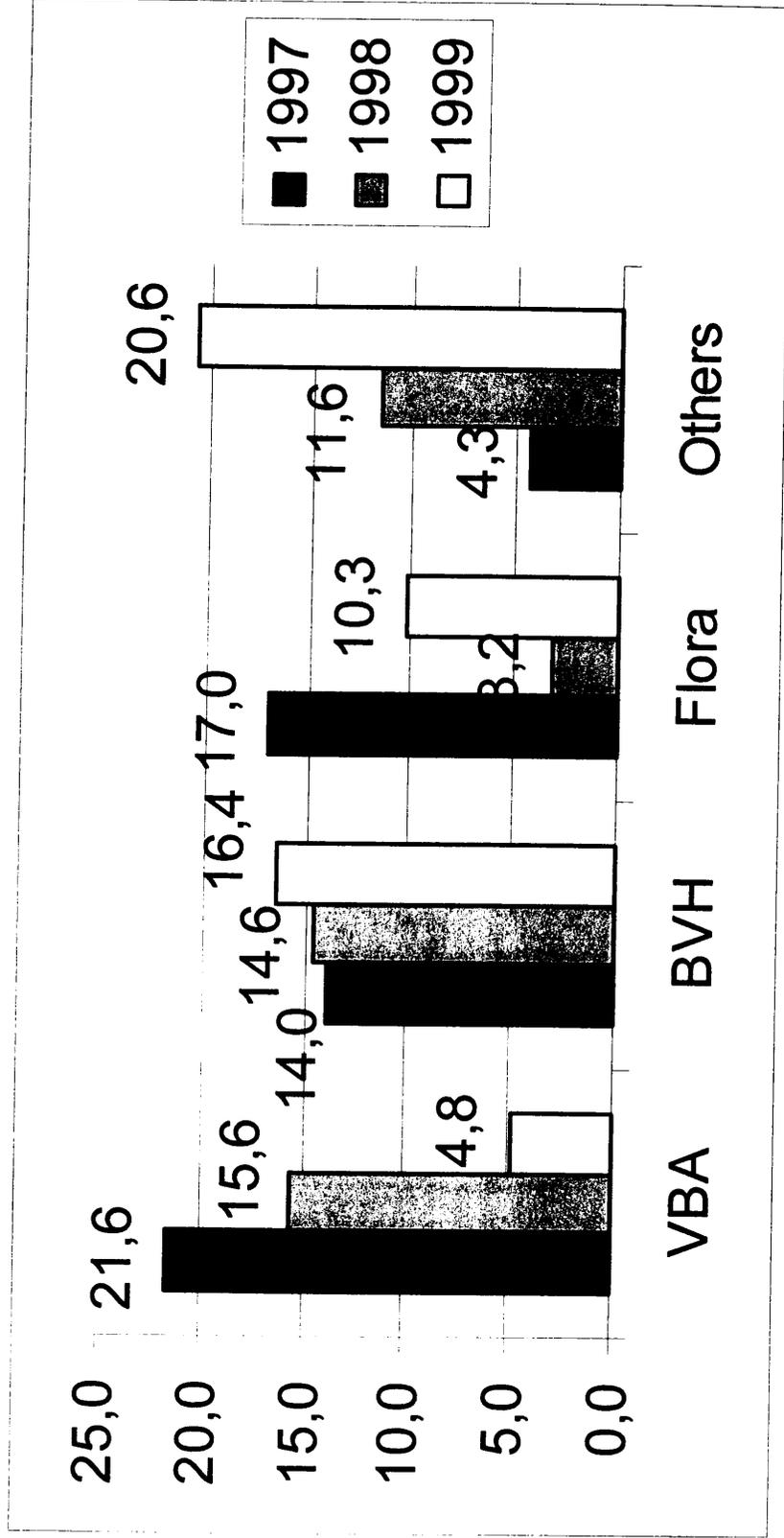
# Supply Cutflowes 1999 (x mill-stems)





# Growth per auction

(based on sold stems)





# Development import NL/VBN

Volume comparison:	1996	1998	Growth
Import NL	61 mill. kg	82 mill. kg.	33%
VBN-auctions	2,05 bill. St.	2,71 bill. St.	32%





# Development import VBN/BVH

## Development import VBN auctions & BVH (billions of pcs.)

Description	1996	1997	1998	1999
Sold (pcs) VBN	2,06	2,40	2,71	2,96
Growth		17%	13%	10%
Sold (pcs) BVH	0,64	0,72	0,83	0,97
Growth		14%	14%	17%





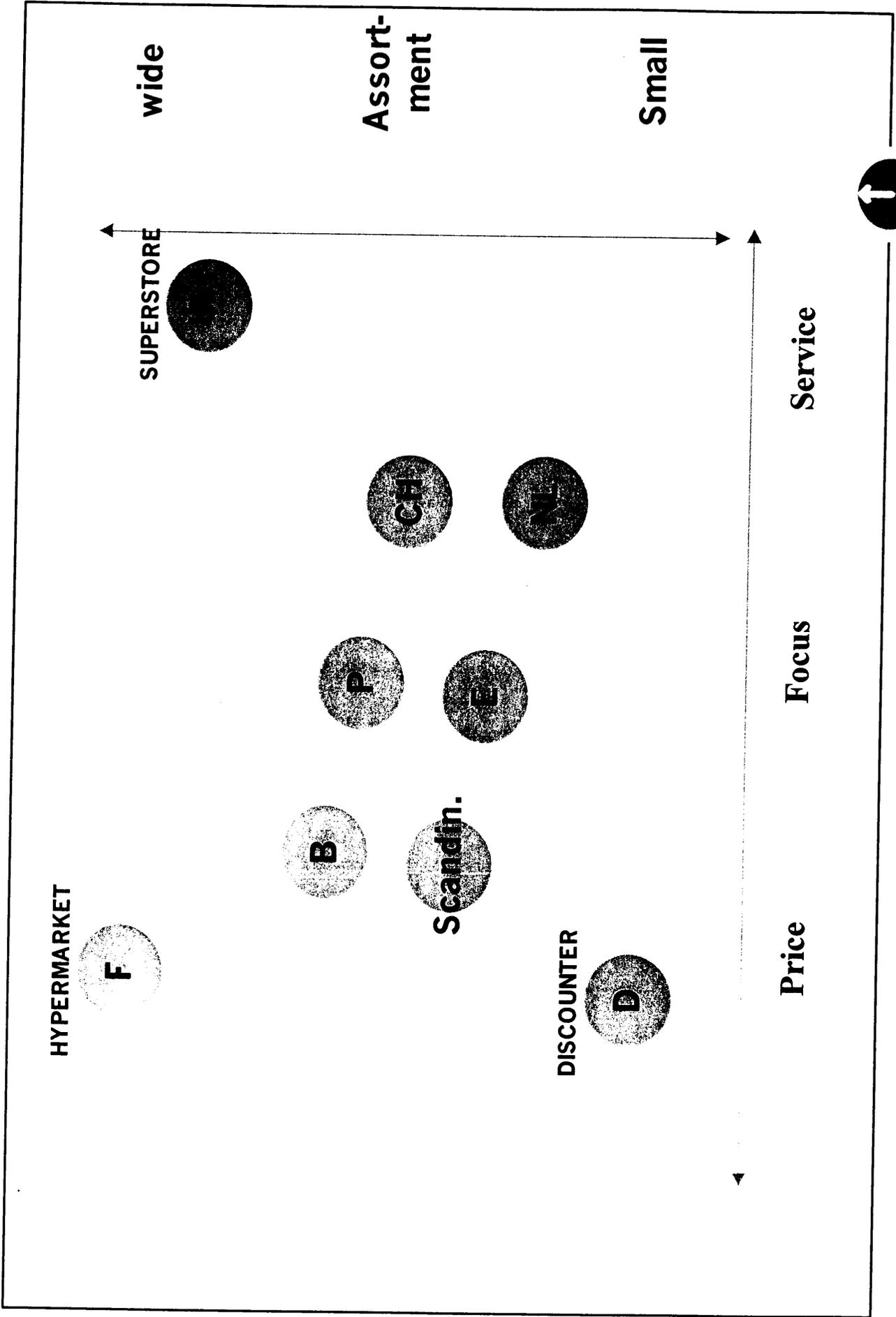
# Marketshare 1998 of different retail outlets

Based on turnover of cutflowers

	<u>Traditional</u>	<u>Retail</u>
Germany	89 %	11 %
France	88 %	12 %
UK	70 %	30 %
Italy	98 %	2 %
Holland	86 %	14 %
Switzerland	48 %	52 %









# Germany:

- Important for Uganda
- Dfl 74,- /cons./cutfl.
- Growth sales potplants
- Export NL→D 40%
- tradit.sales 90%
- Supermarket = image-problem
- Threats German market:
  - popularity flowers
  - in supermarkets, quality and opening hours





# Ugandan Quality (auctionsales)

code	Remark	1999		2000	
		% sales	Av. price	% sales	Av. price
0	No remark	32	26,4	31	28.8
858	Diff. Open. St.	30	23,8	29	24.5
452	Bent necks	12	21,4	16	24.3
110	S. damage Fl.	9	25.9	10	28.1
156	Some not ripe	5	22.4	4	24.8





# Import Quality (auctionsales)

code	Remark	1999		2000	
		% sales	Av. price	% sales	Av. price
0	No remark	61	27,6	69	28,1
937	Not classif.	14	22,6	6	24,9
858	Dif. Op. stage	8	23,8	8	25,2
110	S. damage Fl.	5	28,1	6	31 (valentine)
452	Bent Necks	2	23,1	3	26,5





# Self Assessment Quality

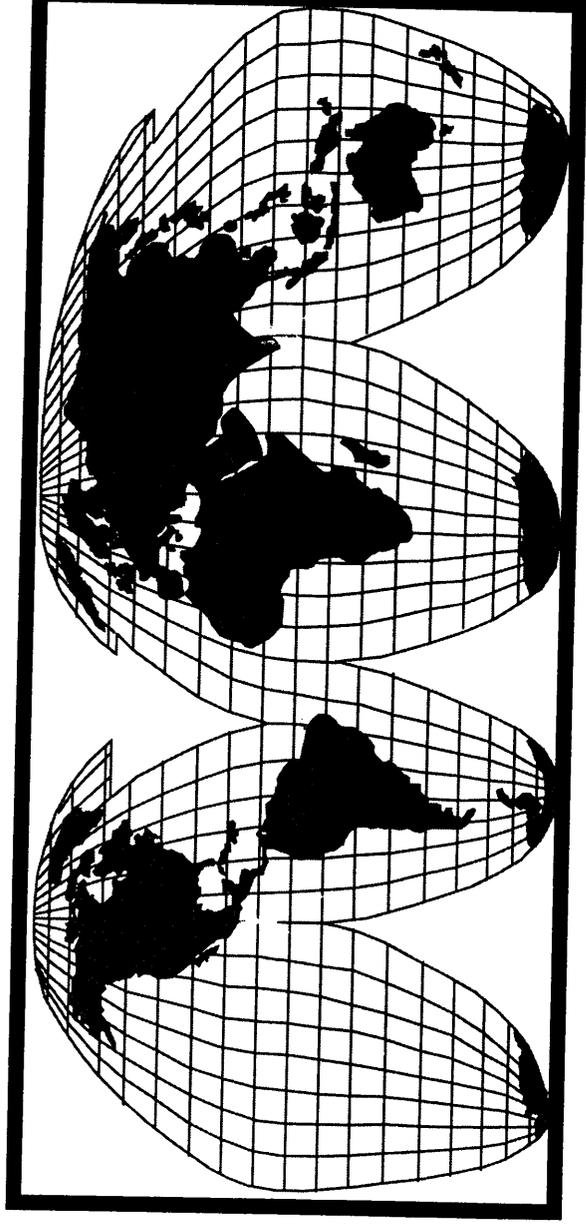
- Objective: to improve supply information towards marketplace:
  - in Holland
  - every grower is responsible
  - focussed on market
  - clocksales
  - auction is facilitating
  - reliability index





# **Global Trends in Flower Marketing**

Debbie Hamrick, Editor  
Flora Culture International magazine





# **Global Trends in Flower Marketing**

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FloraCulture International magazine

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## **Trend No. 1**

### **THE Floriculture WORLD STILL BELONGS TO THE DEVELOPED NATIONS.**

From a production standpoint—looking at the value of production, Six countries in the world produce 74% of the value of floriculture crops: The US, NL, Japan, Italy, Germany and France. Because the US dollar is so strong at the moment, currently it is the largest with Japan being next and the Netherlands No. 3. However with exchange rate fluctuations, the top three spots go back and forth, normally Japan is No. 1.

Africa has a small 1% of the value of all floriculture crop production.

1998 trade in floriculture products was \$7400 million, 49% is cut flowers; 43% live plants and foliage; 8% foliage and other fresh cut vegetation. More than 40% is trade between the Netherlands and Germany.

Preliminary data from the EU for 1999 as shared by Hartmut Fischer, Florimex, Frankfurt, Germany who is on a special EU Committee shows that non-EU countries are not faring as well as their NL or D counterparts. In every country but the Netherlands, third country imports are down in value and in quantity. In Germany third country imports are down 20% compared to 1998.

WHY? Hartmut provides several major reasons.

- 1) Average prices are down, therefore the economic feasibility is down. Israel for example, the No. 1 exporter to NL has taken a real beating lately—growers there are looking for alternative crops. A few weeks ago, I encountered a new company, Genesis Seeds, who is banking on getting growers to produce organic seeds as an alternative crop. They've already got 50 growers on board.
- 2) A decade ago, more money was available to finance start-up operations in developing nations.
- 3) Very important are the economic and political conditions in developing nations. Colombia continues to fight not only drug lords, but rouge political factions who make their income through kidnapping just about anyone; Ecuador's economy was teetering so badly that the country will be adapting the US dollar as its only currency on the 15<sup>th</sup> of September/this month. Kenya is plagued by drought/loss of electricity. Zimbabwe, the governmental situation there has made world headlines...



# **Global Trend No. 1**

## **World Floriculture Production Still Belongs to Developed Nations**

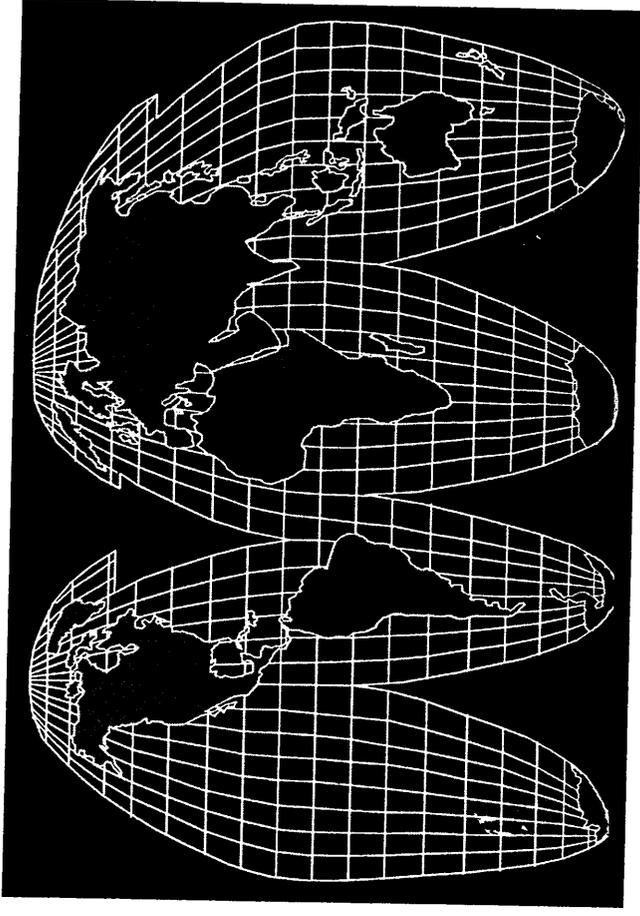
- Six countries produce 74% of value
- Third country exports to EU showing downward trend
- The Netherlands' share of world trade of third country imports is increasing.



# **Six Countries=74%**

## **World Production Value**

- **US A 23%**
- **Japan 17%**
- **The Netherlands 15%**
- **Italy 10%**
- **Germany 5%**
- **France 4%**





Being a grower of cut flowers in a developing nation who is exporting that product to the northern countries is not the same “romantic” lifestyle that it once was when prices were high, and there was a novelty to things like Kenyan dianthus, or super large headed Ecuadorian roses, or Colombian spray dendranthema.

Colombian flower exports are flat (there is a lot of market share trading in Colombia at the moment). Ecuador is down 1998-1999 tons down 16%; Value down 13.7% to \$91.8 million.

(although for this year they are saying up YTD). Kenya is up to NL, UK and SA, down just about everywhere else in 1999; Zimbabwe up in 1999, mainly to NL, but this year...India, down significantly. South Africa is down because the flowers they're trying to sell: Typical cape flora have little market acceptance, Morocco is down, Israel is down, about 30% Harmut says.

The Netherlands, one of the world's three leading production countries, is solidifying its position as the WORLD'S Center point for flower trading. We have a joke about the Dutch traders: Who can buy a product from a Scot (very, very thrifty people—cheap actually) and sell to a Jew (a reputation to be difficult to deal with in business, always driving for a very good deal and a hard bargain) and still make \$: The Dutch. Logistics is their competitive advantage and they are exploiting that. Overall, Harmut's information shows NL has increased its market share of 3<sup>rd</sup> country imports from one half in 1995 to 61% in 1998; Israel, Kenya and Zimbabwe are their leading suppliers.

In the Netherlands cut flower production domestically is up, more than 400 ha for glasshouse and outdoor production in 1999 compared to 1998. Not only that, but their exports are way up to key markets in Europe: for the first 6 months: ↑Jp 39% to the UK, 37% to Italy, 10% to F, 16% to CH, 12% to S, and to the US where the exchange rate is extremely favorable at the moment, up 38%. German markets are up a nominal 5%, DK, A and B up 4%.

In Germany Cut flower production is up too. However, in the US, cut flower production is down—imports continue to gain total market share, they are currently at 86% of the American cut flower market. BUT, the market is flat: Stem usage per capita in the United States is flat at 11.29 per person. The peak was 13.5 in 1992...The Flower Council of NL predicts a 7% growth in the US in the next three years—I'm wondering if that is not overly optimistic given the fact that usage is flat for several years in a row.

## **Trend No. 2**

### **BLURRING BETWEEN ALL FACETS OF THE INDUSTRY**

Blurring of the lines between all facets of the industry. Challenge you to think of this in many ways:

- 1) Crops to produce. What is a cut flower? What is a perennial? Tree/Shrub?
- 2) Production and marketing techniques. Learn from others. Pot roses year-round availability, no longer special. Prices down. Lot of Danish pot plant growers are



# **Global Trend No. 2**

**Blurring of lines between all facets of ornamental horticulture**

- Crops to produce
- Production and marketing techniques
- Consumer perspective



questioning why they're so deep into a crop that year-round availability has turned into a commodity.

3) Consumer perspective. The consumer wants to spend money on pretty flowers. It is we in the industry who draw arbitrary lines about what is a cut flower, perennial, pot plant, etc. We've learned in focus groups with consumers in the United States that people buy flowers because they like them. And, we've also learned a lot of times that they are interchangeable with one another...pot plants, bedding plants, cut flowers...when someone is buying something is an expression of who they are...to help them convey that expression of who they are in their living space or outdoor environment. One day, all of us in the industry will wake up to that fact and stop seeing the ornamental horticulture world with such rigid distinctions.

### **Trend No. 3**

## **POSTHARVEST IS A MAJOR OPPORTUNITY**

Critical and the entire industry, bar no one, is doing a sorry job.

Commonly accepted as fact: The faster the flowers get to market the better the quality. Truth: Cool temperatures and maintaining those cool temperatures at each and every stage of distribution is the MOST IMPORTANT thing to increase flower quality. Cool temperatures slow down the respiration of the flowers, which makes them less susceptible to ethylene; keeps moisture off petals so botrytis is reduced. Growers who can ship by reefer are at a distinct advantage.

A researcher at the University of Florida, Dr. Terrill Nell did a study on flower distribution from Colombia all the way to the American/Canadian consumer. He found out that right now flowers going to consumer in US are at least about 10-12 days old. Harvest, air transport to Miami 1-2 days low, could be 3

Importer (guess) 2-3 days OR MORE, especially on holidays

Regional wholesaler 2-3 days OR MORE, especially on holidays

Retail florist 1-2 days

Consumer

Commonly accepted as fact: Ethylene is bad. Truth: Yes, ethylene in the postharvest situation is bad and speeds up flower deterioration. Ethylene, like cool temperatures is an industry problem—there are not enough scrubbers, not enough treatments to make flowers immune to its effects—1MCP (Ethylbloc) does hold a lot of promise. (If there is ethylene around, 1MCP is not effective-- 1MCP binds sites on the flowers, rendering them unsusceptible to ethylene—gypsophila, or flowers with a lot of growing points are not as effectively treated as are other flowers with 1MCP). It is not registered in Africa.

Commonly accepted as fact: Flower stem diameter, the bigger the better. You know how when we're all walking around in the greenhouse looking at a crop and we'll hold up our fingers and say, wow, look at that stem caliper, must be good? Not really. In Holland they've learned that with mums you actually want narrow caliper, that's because a narrow stem can more easily dissolve air embolisms...could this be true in other flowers as well?



# **Global Trend No. 3**

## **Postharvest is a Major Opportunity**

- The cool chain is the single most important postharvest factor
- We are getting fresh ideas on how production affects postharvest life



Commonly accepted as fact: Cutting stems under water is a good thing. Fact: If you keep on cutting stems under water and not replacing the water each time, you create a bacterial soup that harms life.

Lower relative humidity, higher temps=longer vase life roses in NL

I want to challenge you here today to make postharvest and a solid commitment behind the cool chain THE reason EU member countries will want to come to Uganda to buy their flowers and plants. This is a massive undertaking, but it can be done with industry cooperation.

## **Trend No. 4**

### **DISINTERMEDIATION**

That's a fancy word for cutting out the middleman. This has been a trend for several years and has caused the way certain products are distributed to be drastically changed—forever perhaps. When I first went back to North Carolina 3 years ago, to be totally honest, I was appalled that a number of growers and wholesalers still ran route trucks. That was until I got to know the specific regions where those companies were working—the distance between possible customers, the low population density, and the relatively small orders dropped per store. Truth is, another, more modern approach just wouldn't work in those areas.

We're also seeing this in Miami—where everyone wants to avoid the importer and their famous box charges and nebulous information flow. And in the Netherlands for years there's been tons 'o gossip about who will survive the great battle for the guilder: Auctions or Exporters. Each feels they are more important than the other in the process. Can they each survive? Growers getting in on the battle too.

## **Trend No. 5**

### **INTELLECTUAL PROPERTY**

Royalties are a big deal and are becoming even more important. Crops can and have been confiscated for lack of payment of royalties. In Germany last year 54K roses, about \$13500 worth from Kenya were confiscated because of lack of royalty payment to Kordes the breeder.

FCI got in some pretty deep water with the Colombians for printing something that was generally accepted as fact: Most of the Visa roses in Colombia were propagated illegally. If you read the magazine closely, you've seen the letters, my editorial, etc. The Colombians are supersensitive to the issue because flowers that are illegally propagated can be confiscated at the border AND, the growers' association ASOCOLFLORES worked really hard to get IP/UPOV rules passed in the Colombian legislature.

I could spend an hour on this topic alone because I believe it is absolutely critical to the future of the industry and to individual growers. For brevity, I'll just try to bring up a few points.



# **Global Trend # 4**

## **Disintermediation**

- Cutting out the middleman
- Miami vs. Colombia and Ecuador
- The Dutch auctions vs. Dutch exporters



- New products are driving the industry. Very few young plant suppliers and breeders will tell you that most of their profit comes from older items: They live for the new plant, the panacea that will be the new high profit item.
- Truly, 1000s of new products come out every year--This should prompt you to ask the question: WHAT EXACTLY IS A NEW PRODUCT? It should also prompt you to ask this question of every single salesman who walks in your door promoting the latest greatest. There are only a HANDFUL of companies in the industry WORLDWIDE who are actively breeding new products. By Breeding, I mean performing crosses of a specific male and female parent. Selecting for better performing strains also falls into this area. The best of these companies ALSO have disease indexing programs--they index every new variety for viruses BEFORE they multiply stock and introduce it to the trade. Please NOTE: THIS IS EXPENSIVE! That's why there are only a few companies doing this: Some of them include: Fides/Kiren—FGB also Barberet and Blanc, Pressman, Kordes, Tantau, Florist, Meilland, NIRP, Schreurs, Van Zanten/Van Staaveren, in other products: Ball Horticulture, Goldsmith, Innova Plant (Proven Winners), Ecke, Fischer, Oglevee, Bodger, Sakata, Takii, Pan American Seed, Benary, Jelitto, and others.
- And it's important to note that not all of these companies have bred the products they introduce. After that there are several (not hundreds, not thousands) of backyard breeders who are in love with a genus or a species and they breed products like bedding plants and/or perennials
- Here's the catch: Many of the catalogs you receive may have a new product on the cover for which there may be only 1000 plants in the entire world!!!!!!!!!!!!!! 1000 plants!!!!!!!!!! This is especially true of perennials. Here's what happens, the magazines publicize that variety to you, the grower, to the retailers and to the consumers. All 1000 plants are sold in perhaps 10 minutes. Then, every other order that comes in says CNS or BO. You find this out much later, and might I add, after you've already place your order with this company, perhaps moving some of the products you would have ordered from someone else to this offending company. THIS IS NOT RIGHT. t.
- Here's another trick with new products: Trialing. How does the product perform HERE? Not in northern Germany or southern California, but HERE? A lot of times new products have not been widely tested before they are released. Again, there are large companies who are acting responsibly and widely trialing products before they are released. Or, when they are not, telling the customer that it is not known how the variety will be produced. I cannot stand here today and count up all the growers who have told me that they were told the flowers they were purchasing would have the same yields as in the Netherlands or US or Germany or Japan. ASK questions, detailed questions of the company/person you are buying your plants from. If it's a Dutch company, they will respect you more for it and you will have a better relationship.
- Increasingly new varieties will be more controlled as they come into the marketplace. You may find that you will not have access to every new product that is introduced. I want to give you an example from the nursery industry. However, the same kind of thing is also happening in cut flowers. For example, Cotinus Golden Spirit was discovered by a nursery grower in Boskoop, the Netherlands. He contacted a person



# **Global Trend No. 5**

## **Intellectual property**

- **Royalties are becoming more important**
- **Access to genetics for growers in the future will be more limited**



who handles registration and administration of new varieties and gets products patented, and registers plant breeders rights. As you know, plants that are patented, or in other countries, plants that have breeder's rights, are not allowed to be propagated without the permission of the breeder. The breeder earns royalties on cuttings taken, or on sale of liners. Cotinus Golden Spirit--24K of them--were produced by 2 nurseries last year in the UK. The plants were grown in the rough equivalent of a 1 gallon pot and sold for Nearly \$30 each--they sold out in three days because of publicity on BBC-----BUT ONLY TWO NURSERIES WERE ALLOWED TO PRODUCE IT. This happens with roses today in the Netherlands. Lilies too. And other crops for which it takes a long time to build up multiplication stock: Only a couple of growers get it for the first couple of years, then it receives wider release. Is this bad for you in Uganda? No, not necessarily. Demand is created. You can capitalize on that. BUT, perhaps the companies will get even smarter in the future and become even more selective about who they sell to in various countries...this is already happening where some growers in some countries get products before others do because of the relationships they are building.

- The point: New varieties may not be widely available. Why? Commodization and the lack of market discipline. Again, it is easy for me to take an example from outside the cut flower sector. Let's take a look at the example of Surfinia petunias in Europe these past two years. In the spring 1999 Surfinia petunias were so overproduced that in the Netherlands pots sold for Dfl 0.35 (18 cents--that's a 3.5" pot!), when growers paid Dfl 0.65 (about 33 cents) for the cutting! There, some new plants are being limited--new varieties are being introduced in limited supply to select growers who do not compete with one another. You don't even find out about the new product unless you're the grower of it.
  - Access to specific new, superior genetics in the future will be more controlled than it is today and it will be a way for growers to differentiate themselves as well as a way for retailers to differentiate themselves. Already in the US there are a couple of groups forming to funnel new genetics into specific growers—one is Floragem, another has no formal name, I've dubbed them the Group of 7. This is also happening in Europe—in NL, UK, F for example.
  - Just as growers are introducing plants that are “finished,” breeders and distributors are also creating “finished” marketing programs. This is happening especially in the US with spring plants from companies. However, I have not seen breeder suppliers begin to offer such programs for cut flowers and perhaps this is an area of growth in the future.
  - Invasive plants issue in the US. Biodiversity treaty. Long-range impact on the availability of plants. These two issues aren't even on the radar screens of most in the industry...yet!
1. Not all new varieties are created equally. It pays for you to know who you are dealing with and how that product made it into the market. How many are available? This is a very important question. Also, what kind of testing/disease indexing program has the plant been put through?
  2. Access to new varieties in the future will be more tightly controlled.



## **Trend No. 6**

### **THE ENVIRONMENT**

MPS, The German Green Label. We as residents of developed nations know you live here and do not have access to the same advantages we have. HOWEVER, we are going to apply our standards to you. We expect you to abide by our social standards and to protect the environment. To be honest, arguments that the developed nations have exploited both its people and environment and deposited millions and millions of metric tons of pollutants into our rivers, onto our soil and into the air...well, these comments will fall on deaf ears.

This is a fact. You do not have the luxury of “evolving” your production as growers in other countries have been able to do. You must be better than that today. You will be held to standards that match the values of the customers to whom you will be selling.

On the good side, the Environment has meant all sorts of production opportunities. PRODUCTION SYSTEMS. Finally we’re all “thinking” about what we’re doing with cut flowers. Used to be everything was just put into the ground. Now we’re looking at processes, systems. We’re thinking from the standpoint of the whole, because none of the parts exist outside of the whole. We’re looking at how the environment—meaning the humidity, temperature, light levels affect disease and insect control and learning to manipulate those factors—to achieve control without using pesticides.

Box production of lilies and Exciting production of snapdragons in trays. These modular production systems being used in Europe and the United States facilitate handling/mechanizing handling, keep crops out of the ground thus using less pesticides for soilborne disease and help growers better time their crops—you can put the containers in just the right conditions to speed or slow them—like coolers for instance.

Coolers for bulb crops.

Bent stems for roses. All we’re doing here is thinking of the plant first, increasing the leaf area to increase carbohydrates, to increase the health of the plant.

Hydroponics systems. The Colombians are back in the dianthus business again—they’ve learned to fight fusarium by taking their crops out of the ground. They’re using a polyethylene lining to line beds they’ve dug out about 10 to 15 cm deep—filling the bed with rice hulls and growing their crops hydroponically. What’s happening? Yields are way up, pesticide use is way down. AND, crop quality is much more uniform with a higher percentage of No. 1s.

METHYL BROMIDE. Big issue in the United States. Africa, South America. Interestingly, I haven’t heard so much discussion in Europe. The Dutch already have the problem solved, they use steam from their boiler. But when you’re growing in soil outdoors that’s not possible. And for those California growers sun solarization isn’t really an option either.

END

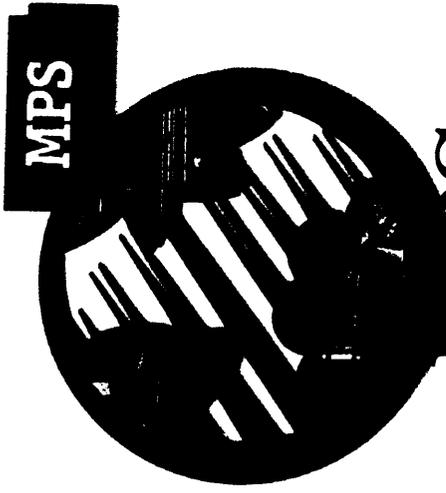


# **Global Trend No. 6**

## **The environment**

- MPS, The German green label
- Evolution of “systems” for production
  - Methyl bromide



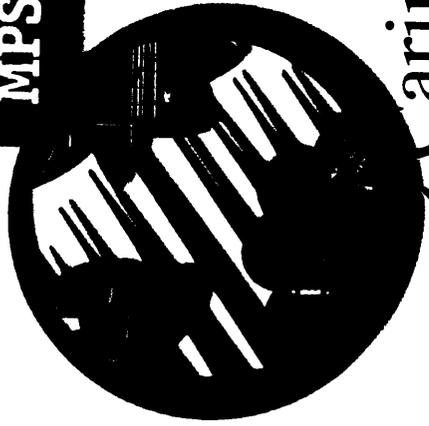


**MPS certification and how it has  
been tailored to meet the needs of  
African flower growers over the  
last 3 years.**

**Marie Ormon  
Co-ordinator East Africa**



**MPS**



# **Increasing awareness from society**

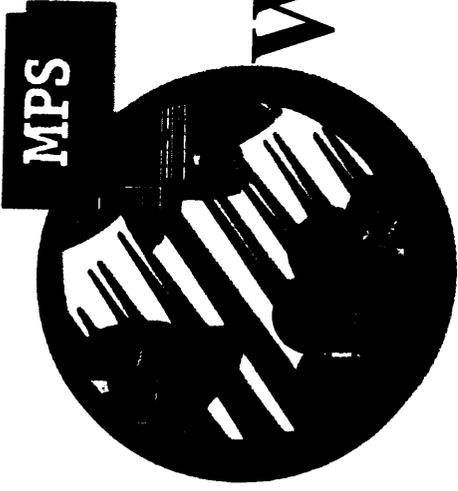
**Caring for earth**

- ⇒ Number of events extremely detrimental to agricultural sector
- ⇒ Legislation / E.U. policy
- ⇒ International agreement (WTO)
- ⇒ Various emerging codes / charters and labels



**MPS**  
MILIEU PROGRAMMA SIERTTELT





# Why MPS in East Africa?

- ⇒ MPS : more and more internationally accepted standard for producers
- ⇒ Environmental and social issues : “hot” items for the press.
- ⇒ Other African countries participating in MPS.
- ⇒ Wholesalers who wish to bring their entire range under MPS flag.







# MPS feasibility studies in Kenya and Tanzania

- ⇒ From 1997 to 1998
- ⇒ 10 participants in Kenya and Tanzania
- ⇒ Conditions of registration
- ⇒ Data studied by the MPS Research and Development Department
- ⇒ Adaptation / Modifications proposed to participants and accepted in 1998







# Adaptation to African

## Situation

### Score Calculation

	Europe	Africa
Crop protection agents	40	50
Energy	30	10
Fertiliser :		
Nitrogen	10	10
Phosphorus	10	10
Waste	10	10
Water	---	10
<b>Total</b>	<b>100</b>	<b>100</b>





**MPS**



# Adaptation to African Situation

## Standards modification (Rose)

	Europe	Africa
Crop protection agents	20- 125 kg a.i./ha	79-185 kg a.i./ha
Energy	23775-38900 GJ/ha	250- 500 GJ/ha
Fertiliser : Nitrogen	800- 2000 kg/ha	800-2000 kg/ha
: Phosphorus	200- 500 kg/ha	200- 500 kg/ha

### PROHIBITED CHEMICALS

The 5 most important active ingredients prohibited are:  
Methyl Bromide/ Dichlorvos/ Endosulfan/ Carbosulfan/ Fenthion



**MPS**  
MILIEU PROGRAMMA SIERTEELT





# MPS: Environmental AND Social Programme

## Social Chapter

<b>Safety and health</b> e.g. use, handling, storage of pesticides / general hygiene etc.	<b>Conditions of employment</b> e.g. anti-discrimination, contracts and wages, medical care etc.
Documentation	Documentation

## Environmental Programme

- Registration every 4 weeks.
- No use of prohibited chemicals

**Grower MPS A/B or C**

**Grower MPS A/B or C AND "Socially qualified"**



**MPS**  
MILIEU PROGRAMMA SIERTEELT





# MPS Social Chapter

- ⇒ Background
- ⇒ Implementation and First Qualifications
- ⇒ Social Audits
- ⇒ MPS Guidelines
- ⇒ Future Developments

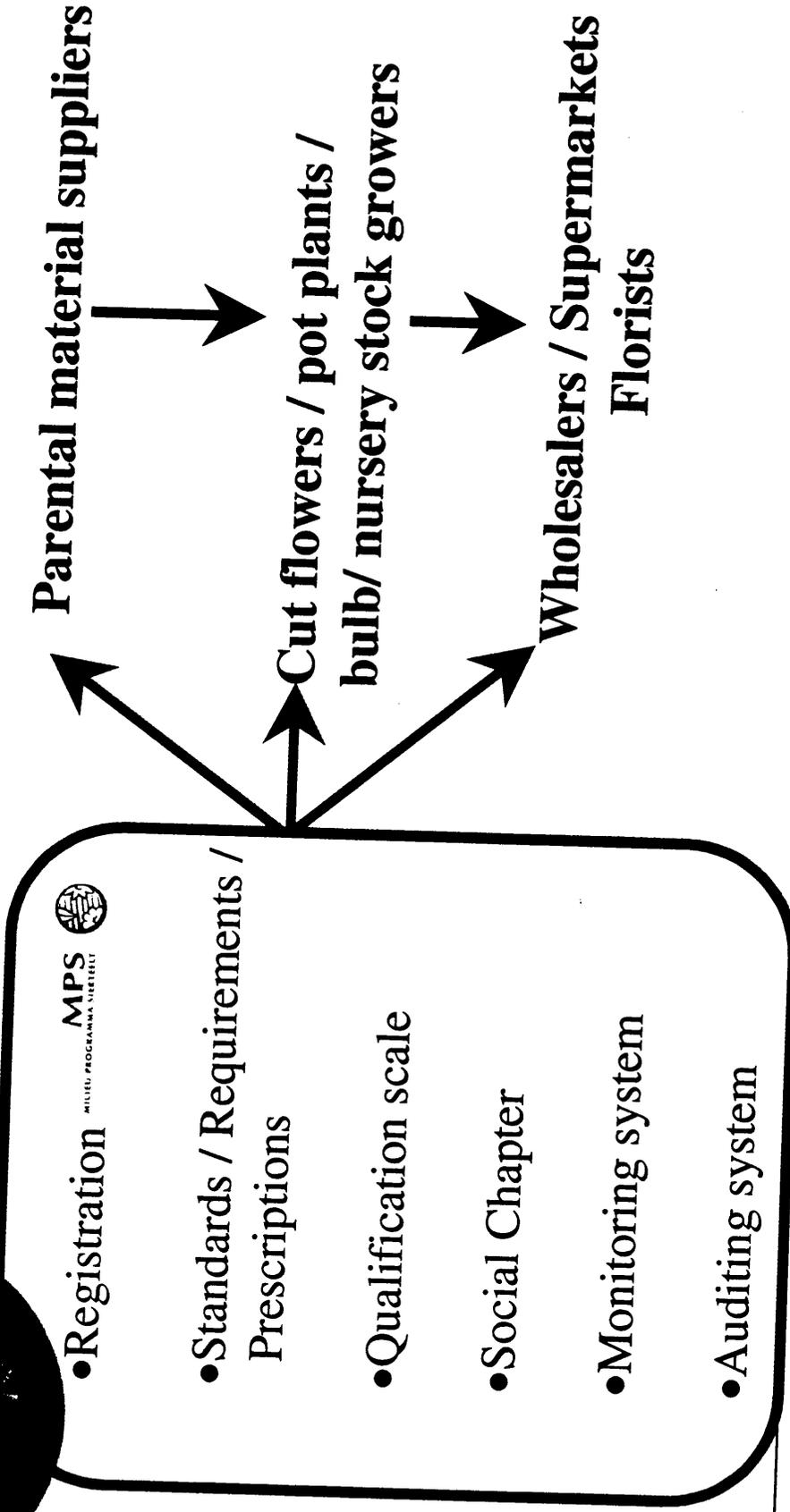


**MPS**



# MPS:

## a programme for the entire chain



**MPS**  
MILIEU PROGRAMMA SIERTTEELT



# **OBJECTIVES AND DESIGN OF THE UFEA RESEARCH TRIALS**

By Jan Krul and Steve New

For Uganda Flowers Exporters Association (UFEA)  
Funded by USAID through the Investment in Developing Export Agriculture Project  
(IDEA)

September 2000



## **1. RATIONALE**

- Climatic conditions in Uganda are not optimal for traditional rose varieties
- No previous research data available in similar conditions
- Lack of appropriate technical knowledge has contributed to past commercial failures
- Public sector research institutes do not have the expertise or resources for floriculture research
- Intensive training and rapid technology transfer is essential for the future of the industry
- Need to respond fast and appropriately to changes in consumer demand
- Potential benefits of diversification, cuttings are a good example

## **2. OBJECTIVES**

- Identify at least two new rose varieties each year which are superior to current varieties
- Identify at least one new product each year, in addition to roses, which has commercial potential
- Identify and introduce at least one improved production or post-harvest technique each year
- Generate sufficient revenue from sales of trial production to cover operating costs
- Provide at least 10 training days to all growers each year
- Reduce the cost and risks of change and entry into the industry
- Deliver the certificate in applied tropical floriculture to at least 15 farm supervisors each year

## **3. DESIGN**

### **3.1 General**

- Self-financing - private sector
- Cooperative - growers, breeders and buyers all involved



- Independent - not tied to specific companies or products
- Professional - high standards and motivated staff
- Accountable - regular reports to UFEA members and sponsors

### **3.2 Experimental Phase 1**

- First planting July 2000
- By September 2000, 48 varieties and controls planted, provided by breeders
- 5 rootstocks
- 9 breeders
- 100-500 plants per variety/rootstock combination
- Standard fertigation and plant management systems
- Observational trials with daily measurements for each variety/rootstock of stems cut, stem lengths, disease intensity, bud size, bud quality and vase life
- Varieties rejected and removed only after presentation of data to grower committee and suppliers

### **3.3 Experimental, Phase 2**

- Starts November 2000
- 4 most promising varieties to be selected
- Selection based on objective scoring during phase 1
  - Yield 30%
  - Disease tolerance 30%
  - Vase life and bud quality 30%
  - Other factors 10%
- Area for each selected variety increased to 1000m<sup>2</sup>
- 4-6 months later a further 4 varieties will be selected
- The 8,000m<sup>2</sup> of selected varieties will be grown as a commercial nursery with all production and economic data published as monthly reports
  - Growers can make decisions to plant new varieties at any stage during stages 1&2







VARIETY	BREEDER	ROOTSTOCKS	COLOUR	BREEDER'S YIELD	UGAND'S YIELD
Isis	Scheurs	3	Pink		
Poeme		3	Pink		
SR 7179		3	Red		
SR 8298		3	Pink		
SR 8321		2	Yellow		
209 Sensai	De Ruyter	3	Yellow		
Cream Prophyta		2	White		
Sypsy Curiosa		2	Bi colour		
Odelia		3			
		3			
Crescendo	Terra Nigra	2	Yellow		
Crizeldis		2	White		
Red Champ		2	Red		
Roxette		2	Pink		
Dee Dee	Meilland	3	Yellow		
Pretty girl		2	White		
Tequila		2	Orange		
No. 1	Agriom	2	Yellow		
No. 4		2	White		
No. 5		3	Yellow		
Fee	Stokman/Brill	3			
Valentine		3	Red		



VARIETY	BREEDER	ROOTSTOCKS	COLOUR	BREEDER'S YIELD	UGAND'S YIELD
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		3			
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Valentine		3	Red		



# UFEA RESEARCH AND DEVELOPMENT CENTER

## BACKGROUND

The R&D Center has been a long awaited project by all the Ugandan Flower Growers, in response to the limited knowledge available on flower production in Uganda. It is widely recognised as a major step in the development of Floriculture with short, medium and long-term implications to the prosperity of the industry within Uganda.

Based on the assessments conducted by various consultants, showing an evident shortage of relevant Floriculture skills within Farm employees and lack of knowledge of plant varieties and their behavior within the Ugandan environment it was decided that UFEA should be proactive in solving these problems.

The R&D trials are located at Nsimbe Estates on the Masaka road situated on a two hectare plot, rented from FIDUGA Ltd. The Center is managed by Mr. Jan Krul, a floricultural advisor with over four years of experience within Uganda.

## OBJECTIVES

The R&DC has been set up to deal with the two main weaknesses within the Ugandan Flower industry;

- The inadequate local expertise in floriculture which we aim to combat by the R&DC providing training for farm workers, as well as farm owners. The R&DC will upgrade the skills and knowledge levels of farm employees in identified areas such as, site selection, variety selection, fertigation, grading, quality control.
- The inadequate local knowledge of the type of flowers suitable for the Ugandan conditions, presently sweet heart roses seem to be thriving best and yielding huge capacities, however their market value is low. The R&D trials will research into other marketable rose varieties, as well as alternative flowers it will also form a study group through which owners and managers of farms will share their individual experiences, learn from each other, and analyse the results of the Flower Trials.

The R&DC has been set up to function as an independent operation from UFEA, and the growers will be expected to buy into it, in order to get maximum benefit from the Center. This does not necessarily exclude those who are unable to buy in, however the monthly discussion groups and the first-hand information will be made available sooner to those with membership.



## **CONCLUSION**

The trials will go a long way in reducing unit production costs for the farms within Uganda, by providing better specialist training and information on the industry. The R&DC is designed to be a one-stop Center for all floricultural information, accessible by all its members and other interested parties, as per the established terms and conditions of the Center.



## FIRST PROGRESS REPORT ON THE UFEA ROSE TRIALS

**Mr. Jan Krul, Flower Advisor, IDEA/UFEA**

In order to develop the flower industry within Uganda, UFEA, with the assistance of ADC/IDEA project have decided to establish a Research and Development Center (R&DC) at Fiduga Ltd. some 22km along the Kampala to Masaka road. This Trial Center has been set up to identify the most suitable roses for the Ugandan climate, and circumstances.

I sent inquiries to most of the rose Breeders, informing them that we were looking for the right varieties for Uganda, with main focus on shorter roses (about 280 stems per m<sup>2</sup>).

I spent one week in Holland where I visited the Breeders. The reaction from the Breeders was overwhelming, they gave the R&DC all the support that I could hope for to organise everything.

I suggested that they make plant materials for 3 to 4 varieties on the different rootstocks available. Rootstock is one of the most important issues as one of the aims of the R&DC is to select which rootstock suits the Ugandan climate best. Examples of typical rootstocks that we have chosen are:

**Canina Inermis: used in North –Western Europe.**

- Approx. 50% used in Uganda at present.
- Has a stronger colour
- Less sensitive to powdery
- Prefers heavy clay soils.

**Rosa- Indica: used in the Mediterranean area.**

- Approx. 50% used in Uganda at present.
- It is a heavy grower (stems are longer, good yielding)
- Gives pale colours
- Most sensitive to Agrobacteria
- Prefers warm- humid climate.

**Natal- Briar: comes from South Africa.**

- Uses more water than other rootstocks
- Longer stem length
- Fast rooting
- Good colour.

**Manetti: used in the Middle- and South America**

- Sensitive for Agrobacterium
- Prefers a warm- humid climate
- Fine root system
- Useful light soils.



What was soon apparent was that it was difficult to bring varieties from different breeders to Uganda, so Stokman Roses (propagator) offered to collect all varieties from the different breeders, and then send them to the R&DC in Uganda, (around week 27). I received 48 varieties +/- 22,000 rose plants. The plants were sent to the R&DC at no cost including the shipping to Uganda. Stokman and the Breeders have agreed to share the costs.

On 16<sup>th</sup> June I planted the first 10 varieties (2,000 plants) from Interplant a Breeder of Zimbabwe. Since then, 38 more varieties have been planted. The growth of the plants is O.K., and I hope that in six months we will see the first results from the trial center.

With regard to the farmer's study club, I suggest that we can start coming together soon on a monthly basis to see how everything is progressing so that we can start to bring out new ideas of how as Growers we want things done. I think this is the way forward for the flower industry in Uganda and I am proud of what we are managing to achieve.



**Integrated Pest Management  
in Floriculture**

M. van de Vrie  
The Netherlands

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**Introduction**

- Personal Introduction
- What is integrated pest management?
- Monitoring
- Economic Treshold
- Control
- Application of Chemical Pesticides
- Guidelines

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**Integrated Pest Management**

- System
- Management
- Little danger as possible to :  
people, environment, crop and beneficials
- Combination of beneficials and  
monitoring, crop sanitation, cultural-,  
mechanical-, chemical-control.

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**Economic Treshold Level**

- Economic Treshold Level is when the cost of control measures is lower than the expected crop damage!

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**Cultural Control**

- Optimise plant growth
- Use of resistant or tolerant varieties
- proper plant densities
- use of pest-free plant material
- soil sterilization
- use of crop rotation

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**Crop Sanitation**

- start with pest- and disease-free plants
- remove deseases or infested plant parts
- have good weed control
- avoid plant damage
- avoid spreading of harmful organism by workers
- apply crop rotation - sterilize soil

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**Mechanical Control**

- Netting may keep insects out greenhouse
- trapping insects
- high temperature may kills potential pests
- removal of invested plant parts
- covering substrate with polythene

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**Biological Control: What?**

- natural enemies
- predators
- parasites
- micro-organisms

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**Biological control: How?**

- Follow the directions for use
- releases at the right time
- only use top quality material
- ensure that no toxic residue is on the plants
- monitoring:
  - development of pest and natural enemies

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### Chemical pesticides cooperative

- Only use selective pesticides
- Apply selective application techniques
- Avoid dusting pesticides
- Apply "Spot treatment"

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### Guidelines IPM for roses

- Monitoring for pests at intervals
- Keeping records of the observations
- Use sticky traps and pheromone traps
- Mark "hot spots" for spot spraying
- Use selective pesticides

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### Guidelines IPM ; THRIPS

- Remove flower buds young plants
- Release natural enemies: *Hypoaspis aculifer* (a against pupae); *Amyloseius cucumeris* (against thrips larvae)

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Guidelines IPM ;  
Red spider mite

- Release Phytoseiulus persimilis (is effective against all spider mites development stages)
- Release Feltiella acansuga
- Release Amblyseius californicus

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Guidelines IPM ;  
Aphids

- Releases of parasites: Aphidius ervi, Aphelinus abdominalis, Aphidoletis aphidimyza

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Guidelines IPM ;  
White Fly

- Releases of Encarsia formosa and Eretmocerus
- Apply Mycotal

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**Guidelines IPM ;  
Caterpillars**

- Have the species identified by using pheromone traps for adults
- Use selective insecticides for controlling the larvae: Bacillus thuringiensis, Nomolt or Spod-X

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**Biological Control Rose growing**

■ Pest	■ Solution
■ Red Spider mite	■ Predator mites (2)
■ Thrips	■ Predator mite (1)
■ Aphids	■ Gallmidge/parasitic-wasp
■ Caterpillar	■ Bac.Thuringiensis/No molt
■ White fly	■ V.Lecanii/par.wasp

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**Integrated Pest Management a  
Challenge for an economical and  
environmental solution of pests!**

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# RESEARCH STUDY ON COLD CHAIN AND POSTHARVEST HANDLING OF UGANDAN FLOWERS (ADC/IDEA PROJECT)

**Dr Chris Bishop (Reader in Postharvest Technology, Writtle College)**

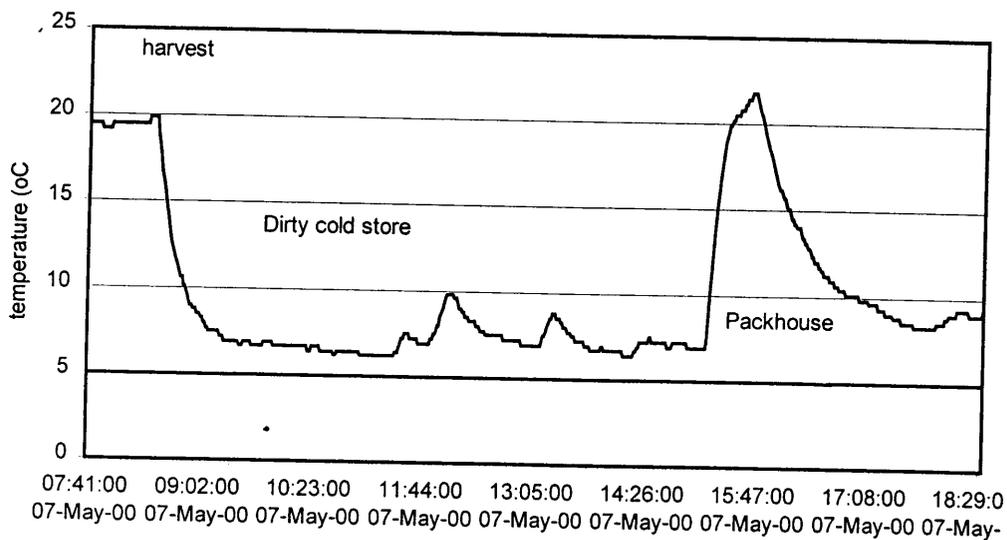
In order to improve the export potential of the Ugandan cut flowers the ADC/IDEA project have commissioned Writtle College to carry out a research project on the cold chain and postharvest handling. The temperatures have been monitored on a number of farms using temperature loggers which record the flesh temperature of the flower bud and it is the initial part of this work which is described in this paper..

## Postharvest Temperature

The factor that has the greatest effect on postharvest flower life quality is temperature. From the investigations and temperature monitoring that has been carried out to date the following potential bottlenecks or difficulties have been highlighted:

- Time to bring in flowers from the harvest
- High temperature and long periods in the packhouse
- Slow and/or inadequate cooling in cold store
- Temperature rise during transport and at airport

The temperature profile below is a typical example and also shows that the temperature is not going low enough as the target should be below 5°C (preferably



nearer 2°C.)

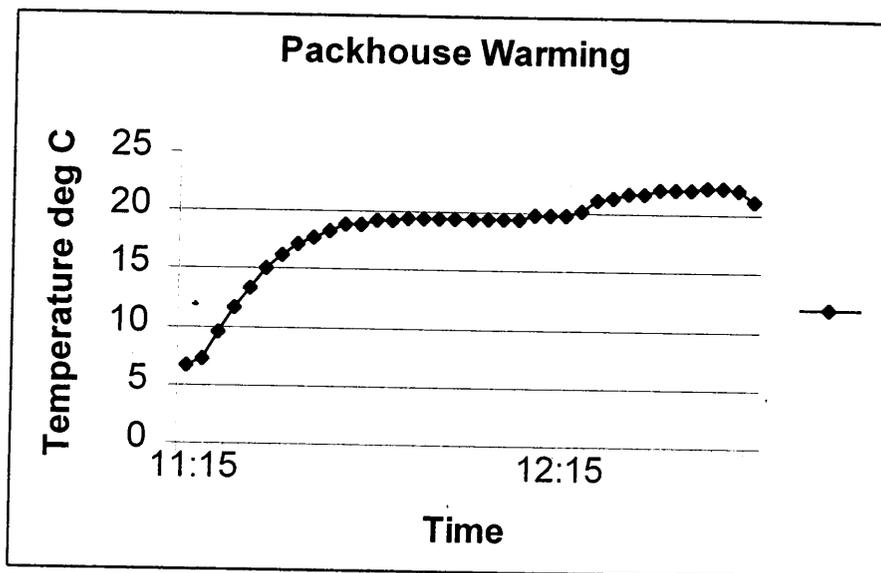


### Time from harvest to “dirty cold store”

One of the difficulties with flower production in Uganda is the high temperatures and this makes the transfer time from harvest to the “dirty cold store” particularly vital. Temperatures in the mid thirties were measured for harvested roses. One hour at 35°C is the same as two at 25°C and at least eight at 5°C so it is recommended that the transfer takes place very quickly and any waiting time in the greenhouse should be under a shaded area.

### Time in the packhouse

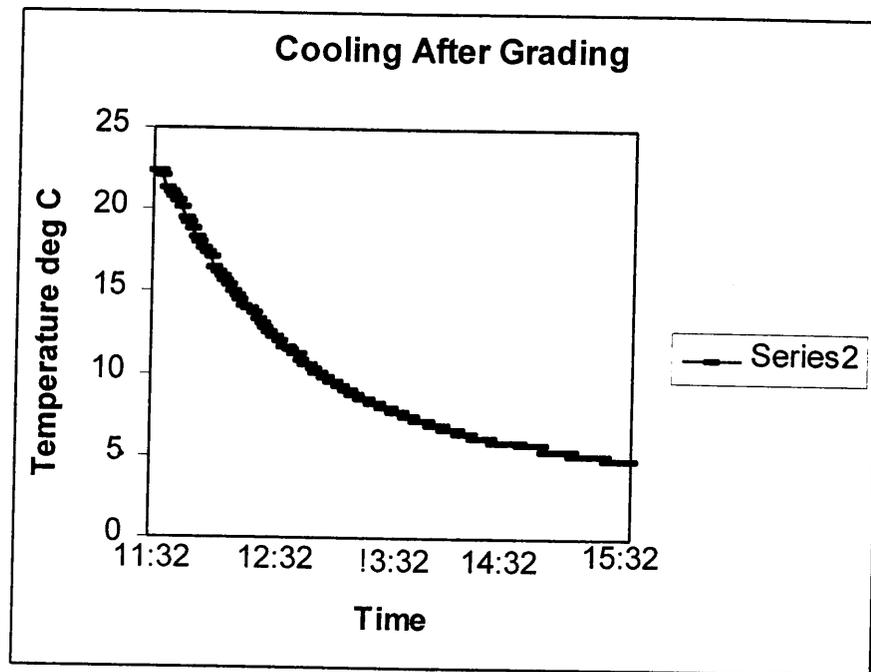
In many countries there are air conditioned packhouse but in Uganda this is not the case although thought should be given to ensuring that the room is as cool and airy as practicable. Flowers pick up temperature very rapidly as can be seen from the graph below and the temptation to take out of store a large number of buckets at once should be resisted.



### Slow or inadequate cooling

It is a very common occurrence that cut flowers are not cooled adequately. The fact that the air in the cold room is at the correct temperature (not always recorded!) of below 5°C does not mean that the flowers have reached this temperature. Examples of cooling rates are shown below and the use of positive ventilation through the flower boxes should be seriously considered.

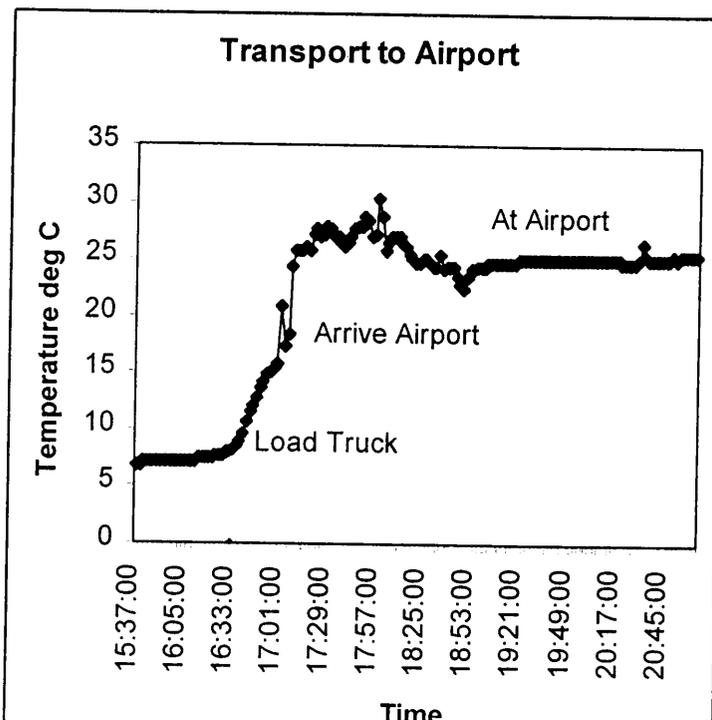




### Temperature rise during transport and at airport

From initial spot measurements of a number (15+) of consignments of roses at the airport some were arriving at 15°C+ and some at an acceptable 4°C.

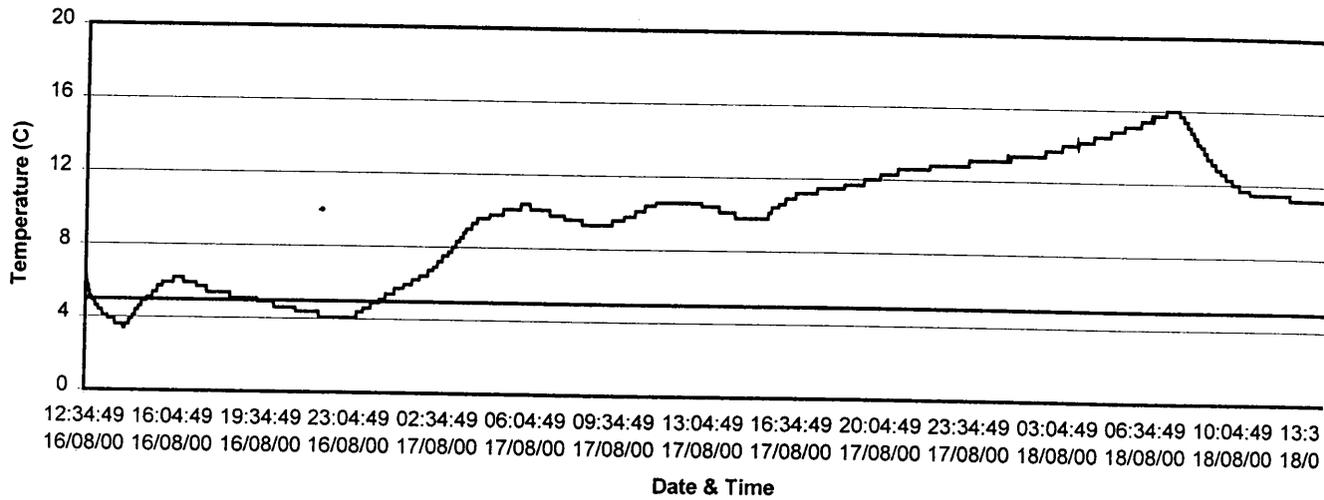
The graph below, which was taken before the improvements at the airport, highlights the rate at which the flowers increase in temperature in unprotected transport (it is 20°C on arrival) and how the temperature increases during the wait at the airport.





After the improvements at the airport there are temperature benefits that can be seen when combined with cool transport. The temperature on arrival is 6°C which is cooled to below 5°C and even after time on the runway the flowers are being loaded at 9°C.

August Cool Chain 2: airport (Entebbe) - airplane - airport (Rotterdam)



There have been significant developments in improving the cool chain for Ugandan flowers but these improvements need to be maintained with attention on the farm and transport as well as the airport.



**UGANDA CODE OF  
PRACTICE (UCOP)  
FOR THE HORTICULTURAL  
EXPORT SECTOR**

*UGAFLOR 2000  
11 AND 12 SEPTEMBER*

*NSIMBE ESTATES  
MASAKA ROAD  
MPIGI*

*Presenter: Steven Humphreys (IDEA  
Project)*



# UGANDA CODE OF PRACTICE (UCOP) for the horticultural sector

- *What is it???*
- *A document providing guidelines on good agricultural practice (GAP)*
- *A living document that needs to be updated annually to keep up with trends in the industry*
- *A management tool which will improve all aspects of your business*



# How did the COP come about?

- Pressure from consumers in Europe
- EU legislation
- Market requirements
- Local legislation
- Increased environmental awareness



# THE 5 CORE PRINCIPLES

- TO ENSURE THE WELFARE OF WORKERS AND OUTGROWERS
- TO ENSURE WORKERS' OCCUPATIONAL SAFETY
- CONSUMER HEALTH SHALL BE SAFEGUARDED
- TO CONTROL AND REDUCE ENVIRONMENTAL DEGRADATION RESULTING FROM AGROCHEMICAL USE
- TO ENSURE THE GENERAL CONSERVATION OF THE ENVIRONMENT



# UCOP- What are the next steps?

## *Implementing and monitoring*

- UFEA should make compliance with the code a mandatory requirement of membership
- Pre-audits by IDEA advisors
- Internal audit by producer association and local auditors
- External audit



# UCOP- External audit

*What are the options?*

- Kenya Flower Council carry out internal audit and call in Buro Veritas once per year
- Export Flower Growers Association of Zimbabwe use MPS and SGS
- Zambia Export Growers Association will use SGS

