

**OFFICE NATIONAL INTERPROFESSIONNEL DES FRUITS, DES LEGUMES,
DES VINS ET DE L' HORTICULTURE
(VINIFLHOR)**

**THE FRENCH ORNEMENTAL HORTICULTURE
(2005)**

French horticulture is represented by four specialities :

- Cut flowers and foliage,
- Potted plants and bedding plants,
- Nursery,
- Flower bulbs.

With 6600 production firms, more than 26 000 commercial firms, 13 200 landscape firms, the ornamental horticulture hires 150 000 persons and has a total turnover of 9 thousand million Euros (including plants, manpower, accessories and garden material).

3 French persons amongst 4 buy at least once in a year some plants or flowers.

One household amongst 2 buy outdoor plants for its garden and / or balcony and terrace once in a year.

The individual purchases represent 2 531 millions euros in 2005, which is comparable to the jewellery industry or the fishing industry .

I –PRODUCTION

The production represents an amount of 1770 millions €, that is to say 4% of agricultural production. France is at the 4th rank after Netherlands, Italy and Germany.

More than 6600 firms are producing on 22 000 hectares; 4500 firms produce flowers and plants on 6000 hectares including 2400 hectares of greenhouses and plastic tunnels.

Around 2000 firms are nurseries, producing ornamental, fruits and forestry shrubs and trees on 15 000 hectares. These firms are mainly small-sized and familial. On another hand, few firms are very industrial.

They are rarely grouped and use, more than in other sectors, short commercial circuits (especially for potted plants and nursery : direct sells represent 25 % of the turnover).

Production firms need important capitals and manpower : ornamental horticulture employ 4,2 work unit per year when classic agriculture needs only 2,2 .

The number of firms is decreasing regularly (about 3% / 4% per year) without any decrease in the production, due to an increasing productivity and the concentration of the firms.

II- DISTRIBUTION

It is very diversified and it is composed of:

- 870 flowers and plants wholesalers, who are intermediaries between production and retail.
For cut flowers, wholesalers are specialised. In others sectors, wholesalers are not specialised and can also be producers, buyers and sellers.
- More than 26 000 retail shops. They can be specialised (florists, garden – centers), or not (supermarkets ...).

III- SERVICES

More than 13 200 landscape and decorative firms contribute every day to the landscaping of private and public gardens.

The firms are from very different sizes : from a single worker to more than 100 employees working on huge projects.

The turnover (plants and manpower) represents 3,9 thousand million €.

The number of firms is increasing and they employ 64 200 employees.

IV- FRENCH PURCHASE IN PLANTS

Plants and flowers private purchases have represented 2531 millions €) (622 millions items bought – one item being a plant, a bouquet, a plant composition) in 2005.

- Flowers and plants : 1 803,5 millions euros.
- Outdoor plants : 728 millions euros.

Between 2004 and 2005, the market has lost 2,5% in volume and 1,5% in value.

Concerning outdoor plants, the market has decreased in volume (-12,2%) and amount (-2,7%) in 2005 but the market value 2002 was the best of the ten last years.

V- EXPORTATION AND IMPORTATION

French importation represents 5 times French exportation.

In 2005, the importation represented an amount of 1022,5 millions € against 177,1 millions € for the exportation causing a deficit of 845,4 millions €).

The most important deficit concerns the cut flowers (47 % of the total deficit) and the indoor plants.



Even though, there is still a lack in the market organisation, and the French ornamental horticulture has difficulties to face the internationalisation of the market .

The French Horticulture has a good tradition in production and purchase. The producers are better and better informed and adapt themselves to the market .

ONIFLHOR INTERVENTIONS FOR ORNEMENTAL HORTICULTURE IN FRANCE

ONIFLHOR participates to the development of the French Ornamental Horticulture by several supports.

- For investment in greenhouses and equipment for outdoor production.
- For helping the gathering of producers.

ONIFLHOR contribute, by financial support, to

- collective research and experimentation programmes (regional programmes),
- economical and development studies (knowledge of the production, the consumption ...)
- participation to collective promotion on a national and European level.



For further information, consult www.viniflor.fr , “publications list”.