

Flowers and decorative plants incl. perennial gardening

Gardeners in Germany mainly produce bedding and balcony plants as well as blooming, potted and green plants. According to ZMP, national production of indoor plants amounted to about 45% while the share of cut flowers was below 20%. According to ZMP estimates, clients spent over €8.9 billion (retail prices) on flowers and decorative plants in 2007. The per capita expenditure of approximately €108 reflects clients' high esteem for flowers and plants. Below we have listed the bestsellers of flowers and decorative plants.

Position	Bedding and balcony plants	Market* Vol. of ca. 1.99 bn €	Blooming indoor plants	Market* Vol. of ca. 1.27 bn €
1	Geraniums	14%	Potted orchid	22%
2	Panses	7%	Cyclamen	8%
3	Heather	6%	Christmas flower	8%
4	Cowslip	6%	Azalea	6%

Position	Foliage plants	Market* Vol. of ca. 0.53 bn €	Cut flowers	Market* Vol. of ca. 3.15 bn €
1	Ivy	9%	Rose	37%
2	Dragon tree	6%	Tulip	10%
3	Weeping fig	6%	Chrysanthemum	7%
4	Indoor palms	6%	Gerbera	7%

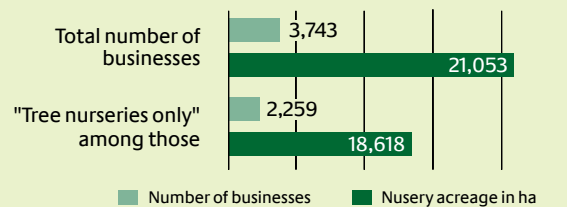
* Basis: retail prices

Source: ZMP

Tree nursery products

About 10% of the horticultural acreage were in use in tree nurseries. Tree nurseries raise a variety of deciduous and coniferous trees, including alley and park trees, blooming trees, fruit trees, ornamental shrubs, soil covers, roses as well as hedges and climbers.

Open space cultivation of tree nurseries



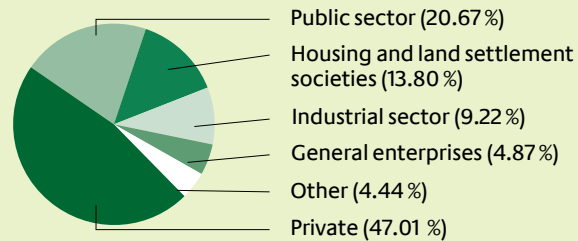
Source: Statistisches Bundesamt, FS. 3, Horticultural Survey 2005

Horticultural Services

Garden construction and landscaping

Exterior facilities are built and maintained by garden, landscape and sports fields constructors. These facilities include private gardens, parks, green spaces as well as playgrounds and sports fields. Construction and maintenance include greening of roofs, facades and interiors as well as various recultivation measures and tree rehabilitation.

Client structure in garden construction and landscaping in 2007



Source: Bundesverband Garten-, Landschafts- und Sportplatzbau e.V.

Cemetery gardening

Cemetery gardeners plan, construct and maintain a variety of gravesites. The responsible local trustees supervise the services to be rendered in connection with permanent gravesite care. There are about 32 m gravesites on ca. 32,000 cemeteries in Germany. Over 80 % of these gravesites are decorated with flowers. The majority of cemetery gardeners operate as business establishments.

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Horticulture in Germany



Facts and Figures

Economic data

Economically speaking, commercial horticulture is part of agriculture, the so-called original production. Horticultural services are characterised by the production value which is determined annually for horticultural and fruit production and for horticultural services rendered. In 2007 a production value of €44,901 million was reported for the agricultural

2007 Production values of special sectors in horticulture (in € m)

Production in horticulture and fruit growing				Horticultural services rendered	
5,435				5,583	
Fruit	Vegetables	Flowers and ornamental plants	Tree nursery products	Horticulture and landscape construction	Cemetery gardeners
956	1,822	1,528	1,129	4,293	1,290

Source: BMELV

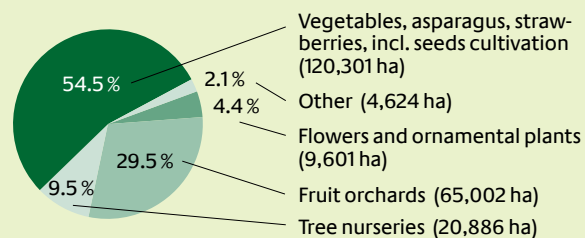
sector. With a production value of €5,404 million, commercial horticulture contributed a share of 12% to the production value generated in agriculture. The production value of horticultural services reached €5,583 million.

Structure

In 2007, a special crop acreage of almost 220,400 ha has been reported in Germany, which makes up ca. 1.3% of the total acreage in agricultural use (17 million ha). Vegetable cultivation uses most of that acreage, followed by fruit cultivation, tree nurseries, flowers and ornamental plants.

2007 main survey on land use in Germany

Special crop acreage: 220,414 ha



Source: Statistisches Bundesamt, BMELV

Number of Horticultural Enterprises

Enterprises growing horticultural products¹⁾	25,439
– Focus Trade and Services	2,405
– Focus Production	23,034
including enterprise type ²⁾	
Fruit culture	7,354
Vegetable culture	4,059
Flowers and ornamental plants	5,882
Tree nurseries	2,259
Other	3,480
Agricultural enterprises incl. horticulture¹⁾	9,263
Total of enterprises incl. commercial horticulture¹⁾	34,702
Gardening, landscape and sports fields construction³⁾	12,892
Cemetery gardeners³⁾	8,000

1) Following the AgrStaG division according to business income

2) According to the classification of agricultural enterprises by the AgrStaG

3) Estimates

Source: BGL, Statistisches Bundesamt, FS. 3 Horticultural Survey 2005, ZVG

In terms of enterprise structure, horticultural businesses are situated in the small and medium range where most of the jobs are created. In commercial horticulture almost 90% of the enterprises are individual businesses, two thirds of which are run full-time. Compared to purely agricultural enterprises, businesses that include commercial horticulture are labour intensive. Hence a work force of 340,000, representing a quarter of the total work force in agriculture, is employed in such businesses. Including the work force from the horticultural services sector, more than 400,000 people are working in horticulture.

Number of horticulture apprentices

2007 (provisional figures)

Total (7 special branches) among them Garden and landscape construction	18,366
Ornamental plant culture	11,615
Tree nurseries	3,639
Cemetery gardeners	1,415
Vegetable cultivation	610
Perennial gardeners	537
Fruit culture	279

Source: Statistisches Bundesamt, BMELV

In 2007 enterprises engaging in horticultural production and services offered about 18,000 apprenticeships in gardening. In general, formation and training take 3 years.

Production in gardening and fruit cultivation

Vegetable cultivation

In 2007, outdoor vegetables for commercial cultivation were produced on an area of 107,868 ha. The production of outdoor vegetables amounted to about 3,18 million tonnes. Compared to the previous year, this is an increase of 7%. The area of under glass cultivation rose to 1,464 ha. In 2007/08, the provisional degree of self-sufficiency with regard to vegetables from commercial cultivation was at 40% while provisional per capita consumption amounted to 82,5 kg.

Open space acreage of major vegetables in 2007

Vegetable	ha	Vegetable	ha
Asparagus, yielding	18,610	Lettuce	2,536
Carrots	10,217	Red cabbage	2,205
Onions	8,388	Kohlrabi	2,235
Cabbage	6,295	Lamb's lettuce	2,101
Peas (without pods)	4,771	Broccoli	1,885
Cauliflower	4,632	Sweet corn	1,525
Iceberg salad	4,439	Celeriac	1,509
Bush beans	4,139	Marrow	1,308
Spinach	3,582	Lollo rosso lettuce	1,271
Little radish	3,294	Red beet	1,151
Gherkins	2,612	Parsley	1,127
Leek	2,558	Savoy cabbage	1,107

Source: Statistisches Bundesamt

Fruit cultivation

30% of the acreage in horticulture were cultivated by fruit growers. The good apple crop in 2007 made up 75% of the total commercial production of fruit. Provisional per capita consumption of fruit from commercial cultivation amounted to 69,7 kg in 2007/08. The provisional supply balance shows a degree of self-sufficiency of 22,1%.

Fruit harvest in Germany in 2007 (in t) – commercial fruit cultivation –

Other	6,270
Raspberries, blueberries, currants	20,817
Pears	49,918
Cherries, sweet and sour	63,209
Plums	65,290
Strawberries	151,319
Apples	1,070,036

Source: Statistisches Bundesamt, BMELV