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## **Ornamental plant market shrinks - German production tends to remain stable**

(ZVG) The overall market for flowers and ornamental plants in Germany shrank again in 2023, by just under 4% to around 8.6 billion euros (at retail prices). This is just below the pre-coronavirus level. According to estimates by Agrarmarkt Informations-Gesellschaft mbH (AMI), almost all market segments recorded declines compared to the previous year 2022.

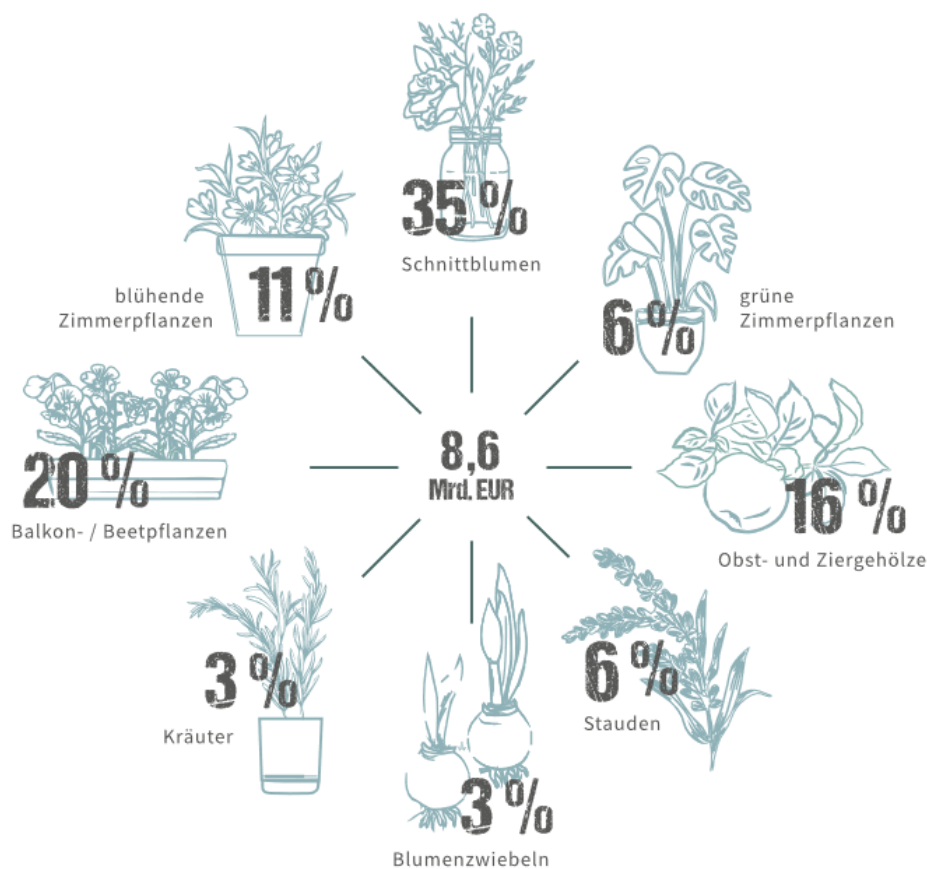
"Sales in the overall market for flowers and ornamental plants were significantly lower last year," emphasised the president of Zentralverband Gartenbau (ZVG), Jürgen Mertz. These appeared to be at the expense of imports. Sales of German production remained comparatively stable.

Although prices for flowers and ornamental plants rose in 2023, in many cases it was not possible to cover the additional costs. Inflation led to falling consumer spending, while uncertainty among end customers continued. Production companies continued to struggle against the shortage of skilled labour and increased minimum wages in addition to the inflation-induced high operating costs. In addition, the weather did not play along in 2023: The first quarter was too wet, the second too dark and the third too hot.

Per capita spending on garden plants fell to less than 49 euros. Bedding and balcony plants remain by far the most important segment within garden plants, although in arithmetical terms each German resident only spent just over 20 euros on them. Per capita spending on perennials fell to less than 7 euros. Fruit and ornamental shrubs were also down, with German residents spending an average of just over 16 euros on woody plants. Herbs almost maintained their previous year's result, but with a low market share of less than 3%, they were unable to contribute to the stabilisation of garden plants overall. Flower bulbs lost around 5 % on the previous year for the second time in a row, meaning that per capita expenditure only just exceeded the 3 euro mark.

The indoor plants and cut flowers segments, which are not nearly as dependent on the weather, performed slightly better than garden plants in 2023 compared to the previous year. Per capita spending on green houseplants, which experienced a real boom during the pandemic, was still moderately above 6 euros. This was just above the pre-pandemic result. The previous year's decline in flowering houseplants was smaller, with per capita spending still exceeding the €11 mark.

Although cut flowers, which remain the largest market segment, remained below the 2022 result, every German resident still spent more than €35 on cut flowers. The value of flowers and ornamental plants imported into Germany up to and including September 2023 fell more sharply year-on-year than the value of exported plants. Proportionately more German goods are traded in the shrunken overall market.



Total market for flowers and ornamental plants 2023 - Sales shares of the market segments in Germany at retail prices (as of November 2023)

Graphic ZVG based on data from AMI GmbH

Explanation:

Schnittblumen – cut flowers

Grüne Zimmerpflanzen – green indoor plants

Obst- und Ziergehölze – fruit trees and ornamental trees

Stauden - perennial plants

Blumenzwiebeln - flower bulbs

Kräuter - herbs

Beet- und Balkonpflanzen - bedding and balcony plants

Blühende Zimmerpflanzen - blossoming indoor plants