



QUARTERLY FLOWER MARKET ANALYSIS

JANUARY TO MARCH 2009

Dear Readers,

We welcome you the first quarterly flower market analysis report for 2009; produced by Uganda Flower Exporters Association (UFEA). The quarterly report provides information on analysis of price trends and volumes of exported flowers from Uganda. Information from auctions provides analysis of the International flower trade

Volume Exported

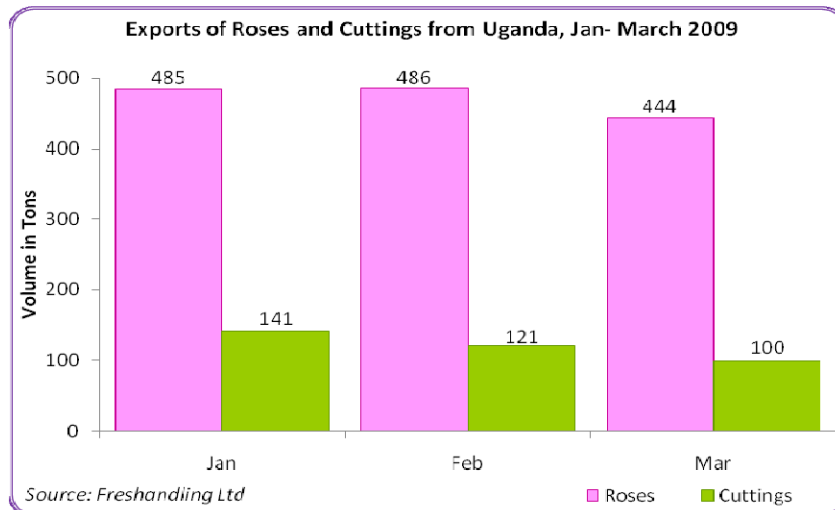


Figure 1 above shows the trend of the volume of Roses and Cuttings/Potted Plants that was exported in the first 3 months of 2009. Between January and February, the volume of roses exported was constant, however, it declined slightly in March. For cuttings/ potted plants, there was a gradual decline from January to March. February is known for Valentine's Day; hence, the flowers exported are usually high during the past years as is the case for 2009. Total exports of Roses for January to March 2009 were 1,415 Tons and total exports of cuttings/ potted plants were 362 Tons for January to March 2009. Roses had export share of 80 percent while cuttings/potted plants had export share of 20% of all flowers exported from Uganda between January and March 2009.

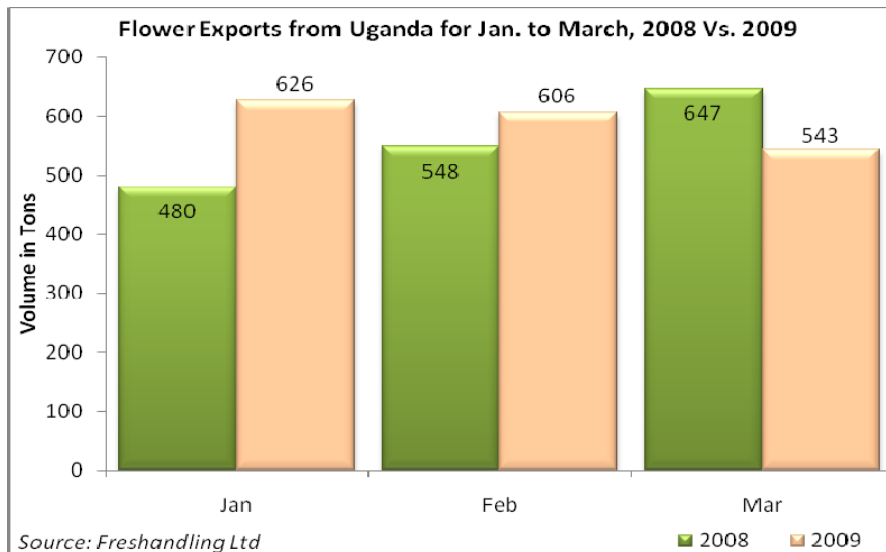
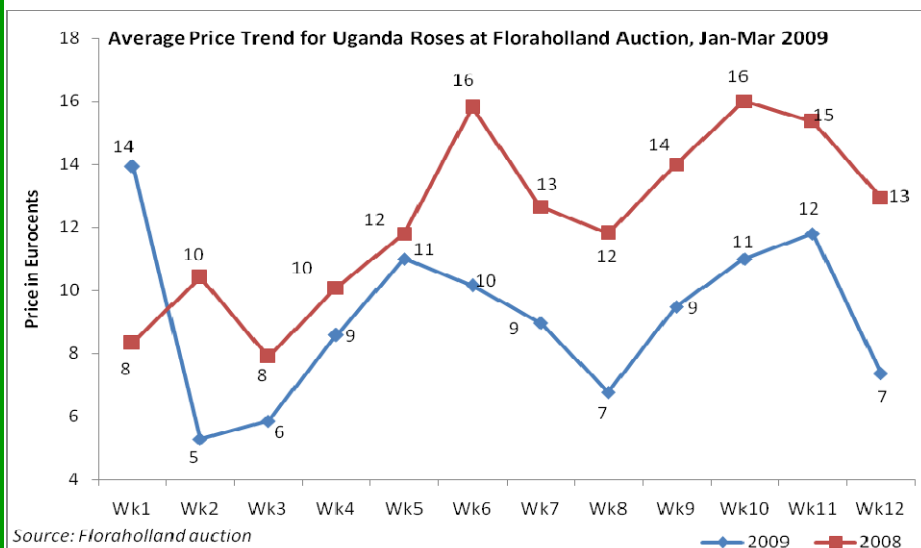


Figure 2 above shows the comparison of the volume of all flower exported from Uganda in 2008 and 2009. Volume of flower exports in January and February 2009 was higher by 30 percent and 11 percent respectively than that exported in the same months of 2008. It was lower by 16 percent for March 2009 than that exported in March 2008. The flower exports in 2009 showed a gradual decline from January to March 2009, while flowers exported in 2008 had a gradual increase from January to March 2008. Total flower exports for January to March 2008 were 1675 Tons compared to 1,775 Tons for January to March 2009. There was an increase of 6 percent in flower exports between the first quarters of 2008 and 2009.

Prices



The Chart on prices gives comparison of weekly average prices of Roses in Floraholland Auctions. This is the period for January to March 2008 and 2009. Generally prices in 2009 were lower than those recorded in the same period for 2008.

Rose price fluctuation ranged between 5–14 Eurocents per stem in 2009, while it fluctuated between 8–16 Eurocents per stem in 2008. In both years, a general price increase was observed in the weeks of February and March where there was preparation for Valentine's day and Mothers' Day respectively.

Lower prices in 2009 were likely due to the effects of the credit crunch in Europe.

Table 1: Volume and Average Prices of of Rose Varieties Exported from Uganda to Floraholland Auctions by March 2009

Varieties	Stems 2009	Stems 2008	Prices 2009	Prices 2008
R GR VALENTINO	1,156,428	273,340	0.09	0.20
R GR JET SET	352,088	20,140	0.09	0.16
R GR AKITO	322,714	116,860	0.10	0.11
R GR BELLE ROSE	268,200		0.12	
R KL CHELSEA	215,740	25,580	0.09	0.08
R GR TROP.AMAZONE	195,080	244,180	0.11	0.14
R GR AQUA!	178,000	80,240	0.10	0.14
R KL RED CALYPSO	176,700	439,140	0.15	0.14
R GR PRESTIGE	148,720	13,570	0.11	0.17
R GR GLOSSY	141,580	47,420	0.08	0.12
R GR GEM IN BOS	134,156	36,580	0.08	0.13
R GR BLUSHING AKITO	130,540	41,760	0.09	0.12
R KL FRISCO	125,820	158,360	0.04	0.05
R GR TUCAN	120,500	168,780	0.08	0.15
R KL SACHA	118,800		0.08	
R GR SONRISA	67,680	153,500	0.07	0.17
R KL JAMBO	64,460	30,500	0.07	0.18
R GR MARIE-CLAIRE!	64,180	103,540	0.07	0.15
R KL SAFARI	51,940	68,920	0.01	0.05
R KL POEME!	39,448		0.11	
R KL ESCIMO	35,550		0.11	
R KL WILD CALYPSO	35,540		0.08	
R GR JUPITER	34,600	62,780	0.05	0.16
R GR SWEET AKITO	29,880	1,500	0.06	0.16
R GR GOLD STRIKE	28,520	40,180	0.08	0.16
R KL RODEO	25,780	107,780	0.03	0.07
R GR INKA	14,240	132,880	0.10	0.12
R GR RED GIANT	13,320	13,800	0.20	0.37
R KL LAMBADA	8,504	28,980	0.08	0.08
R KL DREAM	7,548	72,360	0.05	0.09
R KL ROYAL DREAM	5,460		0.09	
R KL ALOHA	3,500	30,260	0.05	0.12
R GR MYLO	3,000	7,720	0.07	0.11
R KL VIVA!	2,520	316,420	0.00	0.08
R KL BLING BLING	1,600		0.05	
R KL RASPBERRY KING	1,560		0.08	
R KL JAMILLA!	1,260	45,580	0.00	0.06
R GR MARIE-ROYALE	300		0.13	
R KL TOPSUN!	200		0.14	
Total	4,552,380	2,929,730		
Average price			0.08	0.13

Source: Floraholland Auctions

Table 1 gives the total volume and average prices for rose varieties exported from Uganda to Floraholland auctions by March 2009. By March 2009, Valentino had the highest volume exported followed by Jet Set, while by March 2008 Red Calypso had the highest volume exported followed by Viva!

Red Giant had the highest price of 20 Eurocents per stem by March 2009 and it had the highest price of 37 Eurocents per stem by March 2008. In 2009, Red Giant was followed by Red Calypso with 15 Eurocents per stem and in 2008 it was followed by Valentino with 20 Eurocents per stem. The above flowers are red which shows it was a favourite Rose flower colour to buyers and this might be due to Valentine's Day.