



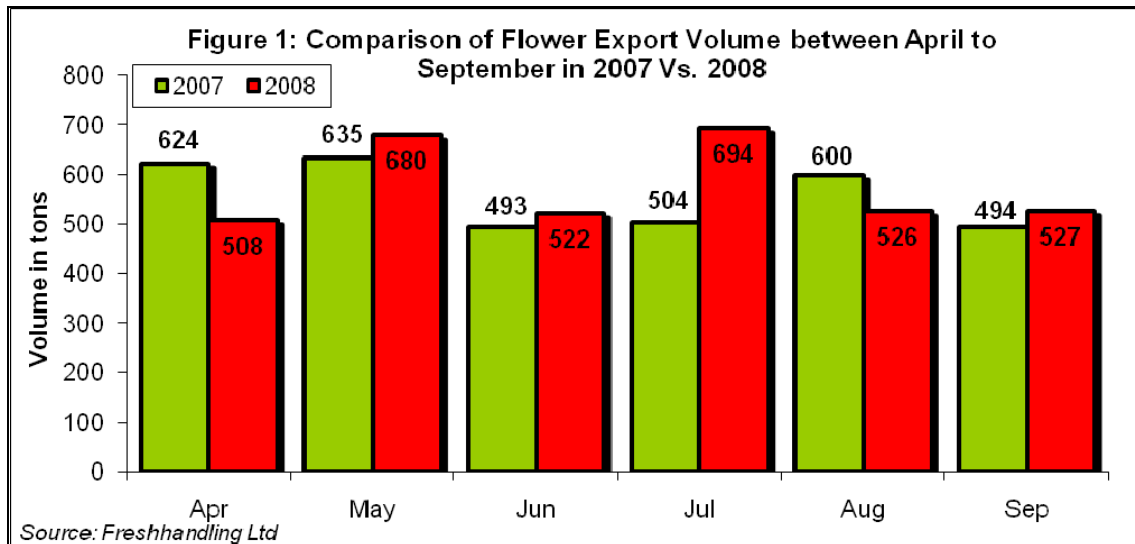
# QUARTERLY FLOWER MARKET ANALYSIS

## JULY TO SEPTEMBER 2008

Dear Readers,

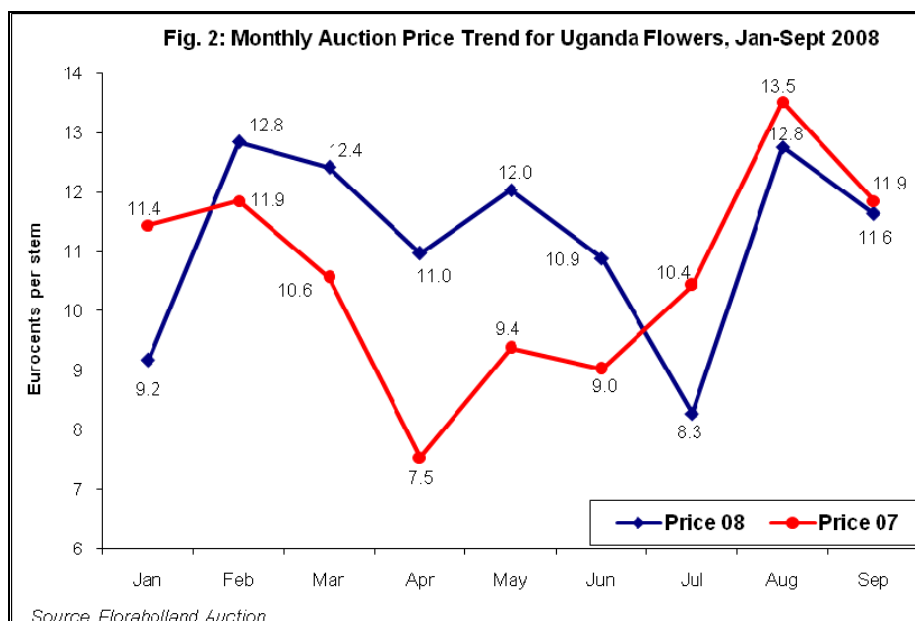
We welcome you the third quarterly flower market analysis report produced by Uganda Flower Exporters Association (UFEA). The quarterly report provides information on analysis of price trends and volumes of exported flowers from Uganda. Information from auctions provides analysis of the International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

### Volume Exported



The flowers exported included Roses, Cuttings and Potted Plants which are produced by 20 flower farms. In figure 1 above, between July and August 2008 the volume of flower exports declined by 24% (694 - 526 tons), while it increased by 19% (504 - 600 tons) during the same period in 2007. Between August and September 2008, the volume increased negligibly (526 - 527 tons), while it declined by 33% (600 - 494 tons) in 2007. In 2008, the volume exported between April and June was 1,710 tons compared to 1,747 tons exported between July to September; an increase of 2%. The volume exported between July to September 2008 (1,747 tons) was 9% higher than that exported in the same period of 2007 (1,598 tons). The volume exported between April to June 2008 (1,710 tons) was 2% lower than in the same period of 2007 (1,752 tons).

### Prices



In Figure 2, in the first and second quarter average rose prices of 2008 were generally higher than prices in 2007 (Jan to June). In the third quarter (July to September) prices in 2008 were generally lower than prices recorded for the same period of 2007.

Prices in August shot up in both years yet August is not known for any special days. Furthermore, prices tend to be low due to high supply of flowers with EU countries. For the month of August, the price in 2007 (13.5 €cents) was 5% higher than the price in 2008 (12.8 €cents). During 2008, the price in August was the same as that in May when there is Mothers' Day.

For the 9 months, the price in August was highest for both 2008 and 2007.

**Table 1: Average Monthly Prices of Rose Varieties Exported from Uganda to Floraholland Auction, April- September 2008**

	Apr	May	Jun	Jul	Aug	Sep
R GR AKITO	10.4	16.0	12.8	10.4	16.3	16.3
R GR AQUA!	13.0	18.5	12.8	10.0	16.0	17.3
R GR BELLE ROSE		17.3	20.3	12.8	20.8	16.8
R GR BLUSHING AKITO	9.5	11.8	9.0			11.5
R GR Mixed varieties	10.4	13.0	11.3	4.4	7.0	11.5
R GR GLOSSY	9.6	12.5	11.8	8.3		12.0
R GR GOLD STRIKE	11.5	14.0	12.5	9.3		
R GR INKA	9.8	9.5	10.0			10.0
R GR JET SET	12.0	10.0		6.0	13.0	9.0
R GR JUPITER	11.4	12.3		8.0		10.0
R GR MARIE-CLAIRE!	12.6	16.3	13.3	10.4	17.3	17.3
R GR MILVA	10.8	15.0	11.0	7.8	14.0	11.0
R GR MYLO	13.8	14.8	8.5	8.3	14.5	14.5
R GR PRESTIGE	12.0	11.5	11.8	7.0		13.0
R GR RED GIANT	12.0	17.0	11.5	6.0		11.0
R GR SONRISA	10.8	11.3	10.3	7.6	14.0	12.3
R GR SORRAYA	10.0	6.0				9.0
R GR SWEET AKITO			14.5	8.5	15.0	13.8
R GR TROP.AMAZONE	11.8	14.0	11.0	9.0	14.0	12.3
R GR TUCAN	12.4	14.3	11.8	9.6	15.7	16.0
R GR VALENTINO	13.0	11.8	12.8	8.6	14.0	11.3
R GR VANILLA SKY		12.0	12.0			
R KL ALOHA	9.6	11.8	10.0	6.0	13.5	11.3
R KL CHELSEA			8.0	2.0	6.5	9.5
R KL DREAM	15.0	6.3	5.0	2.0	3.7	7.5
R KL FRISCO		7.3	4.7	2.0	4.8	4.8
R KL Mixed varieties	8.8		11.0	7.5		14.0
R KL JAMBO		22.0				8.0
R KL JAMILLA!	11.0	8.3				6.0
R KL LAMBADA		10.0				5.0
R KL RED CALYPSO	9.6	9.3	7.5	7.3	14.0	7.0
R KL RODEO		7.7	7.0			8.0
R KL SAFARI		6.0	6.0	2.0	5.5	3.8
R KL VIVA!	7.0	8.0	5.0	3.0		

Source: Floraholland Auction by October 2008

Table 1 gives prices for 6 months from April to September 2008. Prices were highest during May and August and were lowest during July. Prices were high in May due to Mothers' Day; however, the reason for high prices in August is yet to be discovered. Uganda flower prices would be expected to be low in August because growers in EU countries produce flowers more cheaply during summer than in other periods of the year.

From the table the varieties that gained above 20 Eurocents in any month included; Belle Rose (20.3 & 20.8), and Jambo (22).

### News from the Flower market in the World

The Floraholland Newsletter Import, July-August 2008 reported that Israeli growers were affected by the high fuel price just as Dutch growers. For Dutch growers the high fuel prices are observed in the price of natural gas, while in Israel they lead to high transport costs. As a result of the high fuel prices, the Israelis expect sea transport to grow in importance and, therefore, are cultivating products that are more "seaworthy".

The Floraculture International Magazine, September 2008 reported that, Singaporeans were seeing themselves in the future as a hub for the flower and plant trade in that part of Asia because of the interests and opportunities in that trade. Singapore had organized a flower trade exhibition in which over 60 companies participated and it is expected that numbers would increase at the next Singapore Garden Festival in 2010. It was observed that Singapore has many benefits, the citizens are well-educated, the geographical location is wonderful, the infrastructure is highly developed with good air connections, it has one of the biggest harbours in the world and, finally, it is in an economically emerging part of the world.