PROGRAMAS DE INNOVACIÓN TERRITORAL

ESTUDIOS

INFORME TÉCNICO FINAL

INFORME TÉCNICO DE AVANCE DE ESTUDIOS

EJECUTOR: Vital Berry Marketing S.A.

NOMBRE DEL ESTUDIO: Estudios de mercado de peonías

CÓDIGO: EST-2007-0255

Nº INFORME: Final

PERIODO: Desde: Enero 2008 Hasta: Octubre 2008

NOMBRE Y FIRMA COORDINADOR ESTUDIO: Enrique Acevedo Herl

USO INTERNO FIA	
FECHA RECEPCIÓN	

1. Resumen ejecutivo del estudio (máximo 1 página)

El resumen debe mencionar brevemente la metodología utilizada y a la obtención de aquellos resultados más relevantes, basándose en los objetivos general y específicos propuestos. Deberá explicar brevemente el grado de alcance de los resultados y emitir un juicio sobre los principales impactos técnicos, económicos y sociales alcanzados en el contexto del Programa.

Se contrato los servicios de la empresa holandesa FBI (Flowers Best Interes) para realizar el estudio de mercado holandés. Finalmente esta empresa declinó hacer el estudio americano dado la dificultad para ellos de disponer de suficiente información relevante para un buen resultado.
La ASOEX recomendó tres empresas que podrían hacer el estudio solicitado. Dos de ellos aceptaron y nos hicieron llegar sus respectivas propuestas. Promar International de UK con un estimado de £ 15.500 y Perishables Group de USA con un estimado de US$65.850. Se acordó no hacer el estudio bajo estos costos y se procederá a reunir información en distintas fuentes existentes. La información de las giras comerciales y la obtenida en otros estudios realizados anteriormente sería suficiente de acuerdos a los fondos con que cuenta el Programa.

2. Resultados

Descripción detallada de los resultados obtenidos en comparación con lo previsto en la propuesta original.

A principios de Septiembre se recibió el estudio de mercado holandés que fue aprobado como satisfactorio por los productores.
El estudio de mercado de Holanda y las giras comerciales a USA y Europa dan una idea de las pequeñas diferencias de los mercados visitados. Mientras en Holanda predomina la venta en subasta, en USA este método es rechazado por la mayoría de lo distribuidores mayoristas. Holanda es el centro de entrada para la posterior exportación a los países europeos e incluso a USA.
En Holanda existe una verdadera industria que se dedica a preparar las flores para la mejor presentación de flores y posterior venta en la subasa o directa. En USA se limitan a distribuir las cajas a sus respectivos clientes.
En UK existe gran demanda de flores por las cadenas de supermercados. Estos ofrecen menores precios pero gran volumen.

3. Conclusiones y Recomendaciones

Variedades rojas y blancas son las preferidas por los recibidores americanos para la época de navidades. Estos colores también tienen mayor demanda en Europa, pero las variedades rosadas clasicas todavía tienen una gran demanda.

UK se presenta muy positivo en especial si los productores tienen algunos de las acreditaciones o certificados de calidad europeos.

Se adjunta Informe Estudio de Mercado FBI (Flowers Best Interest) BV en archivo digital PDF.

I. ANEXOS

Se deben completar todos los antecedentes de las personas y organizaciones que están vinculadas al proyecto, según **Ficha Datos Personales (Anexo 1)** o **Ficha Datos Organización (Anexo 2).** Se deberá completar una ficha personal para cada persona que participe en el proyecto de acuerdo a su tipo de participación o vinculación (representante legal, coordinador, profesional equipo técnico o beneficiario directo). De la misma forma, se deben completar los antecedentes de todas las entidades que participan en el proyecto, tanto como agentes postulantes, asociados o como beneficiarios directos, según la Ficha de Datos Organización.

Esta información deberá actualizarse con cada informe de avance técnico que se entregue, en caso de que los antecedentes solicitados se mantengan iguales a los entregados en el informe anterior, se deberá destacar dicha situación evitando adjuntar nuevamente las fichas.

ANEXO 1 : FICHA DATOS PERSONALES

FICHA REPRESENTANTE(S) LEGAL(ES)

(Esta ficha debe ser llenada tanto por el Representante Legal del Agente postulante o Ejecutor como por el Representante Legal del Agente Asociado)

Tipo de actor en el Proyecto (A)				
Nombres	Juan Ignacio			
Apellido Paterno	Allende			
Apellido Materno	Connelly			
RUT Personal				
Nombre de la Organización o Institución donde trabaja	Vital Berry Marketing S.A			
RUT de la Organización	96.567.530-2			
Tipo de Organización	Privada			
Cargo o actividad que desarrolla en la Organización	Gerente General			
Dirección (laboral)	Avenida del Parque 4680 oficina N° 503			
País	Chile			
Región	Metropolitana			
Ciudad o Comuna	Huechuraba, Santiago			
Fono	2- 5870600			
Fax				
Celular				
Email	jiallende@vitalberry.com			
Web				
Género	Masculino	x	Femenino	
Etnia (B)				
Tipo (C)				

(A), (B), (C): Ver notas al final de este anexo

(Se deberá repetir esta información tantas veces como números de representantes legales participen)

FICHA COORDINADORES Y EQUIPO TÉCNICO
(Esta ficha debe ser llenada tanto por el Coordinador Principal, Coordinador Alterno y cada uno de los integrantes del Equipo Técnico)

Tipo de actor en el Proyecto (A)				
Nombres	Enrique			
Apellido Paterno	Acevedo			
Apellido Materno	Herl			
RUT Personal	9.447.743-7			
Nombre de la Organización o Institución donde trabaja	Vital Berry Marketing S.A.			
RUT de la Organización	96.567.530-2			
Tipo de Organización	Pública		Privada	x
Cargo o actividad que desarrolla en la Organización	Gerente Investigación y desarrollo VBM SA			
Profesión	Ingeniero Agrónomo			
Especialidad				
Dirección (laboral)	Av. Del Parque 4680			
País	Chile			
Región	Metropolitana			
Ciudad o Comuna	Huechuraba, Santiago			
Fono	02-5870600			
Fax				
Celular	09-2772363			
Email	*eacevedo@vitalberry.cl*			
Web				
Género	Masculino	x	Femenino	
Etnia (B)				
Tipo (C)				

(A), (B), (C): Ver notas al final de este anexo

(Se deberá repetir esta información tantas veces como números de coordinadores e integrantes del equipo técnico participen)

FICHA PARTICIPANTES O BENEFICIARIOS DIRECTOS

(Esta ficha debe ser llenada por cada uno de los beneficiarios directos o participantes vinculados al proyecto)

Tipo de actor en el Proyecto (A)				
Nombres				
Apellido Paterno				
Apellido Materno				
RUT Personal				
Nombre de la Organización o Institución donde trabaja				
RUT de la Organización				
Tipo de Organización	Pública		Privada	
Cargo o actividad que desarrolla en la Organización				
Profesión				
Especialidad				
Dirección (laboral)				
País				
Región				
Ciudad o Comuna				
Fono				
Fax				
Celular				
Email				
Web				
Género	Masculino		Femenino	
Etnia (B)				
Tipo (C)				

(A), (B), (C): Ver notas al final de este anexo

(Se deberá repetir esta información tantas veces como números de participantes o beneficiarios directos participen y/o estén vinculados al proyecto)

Se entenderán por beneficiarios directos del proyecto todas aquellas personas, productores, organizaciones, empresas u otra entidad, que sin poder constituirse en asociados de la propuesta, de alguna manera participan en el proyecto realizando un aporte a éste y a la vez recibiendo algún tipo de beneficio por dicha participación. En el caso de Productores se deberá llenar los siguientes cuadros:

ANTECEDENTES GLOBALES DE PARTICIPACIÓN DE PRODUCTORES

REGIÓN	TIPO PRODUCTOR	GÉNERO FEMENINO	GÉNERO MASCULINO	ETNIA (INDICAR SI CORRESPONDE)	TOTALES
IX	PRODUCTORES PEQUEÑOS	1	1		2
	PRODUCTORES MEDIANOS-GRANDES		2		2
	PRODUCTORES PEQUEÑOS				
	PRODUCTORES MEDIANOS-GRANDES				

ANTECEDENTES ESPECÍFICOS DE PARTICIPACIÓN DE PRODUCTORES

NOMBRE	UBICACIÓN PREDIO			Superficie Hás	Fecha ingreso al proyecto
	Región	Comuna	Dirección Postal		
Lilian Stegmann Mathei	IX	Collipulli	Parcela 3 Calle del 10 Km 20 Camino San Andres	30hectareas / 5 Regadas	Dic 2007
Brian Blackburn Ceballos	IX	Quino			Dic 2007
Eduardo Pablo Vines Contreras	IX	Freire	Km 8 camino Freire a Villarrica, Freire, IX Región.	80 Ha	Dic 2007
Agricola San Jose de Gorbea	IX	Gorbea			Dic 2007

(A) Tipo de actores en el proyecto (personas naturales)

Actores → Representante legal del Agente postulante o Ejecutor
→ Representante legal del Agente Asociado
→ Coordinador Principal
→ Coordinador Alterno
→ Equipo Técnico
→ Beneficiario Directo: Productor, profesional, empresario u otro participante y/o vinculado al Proyecto

(B) Etnia

Mapuche
Aimará
Rapa Nui o Pascuense
Atacameña
Quechua
Collas del Norte
Kawashkar o Alacalufe
Yagán
Sin clasificar

(C) Tipo

Productor individual pequeño
Productor individual mediano-grande
Técnico
Profesional
Sin clasificar

ANEXO 2 : FICHA DATOS ORGANIZACIÓN

FICHA AGENTES POSTULANTES Y ASOCIADOS

(Esta ficha debe ser llenada tanto por el Agente Postulante o Ejecutor, como por cada uno de los Agentes Asociados al proyecto)

Tipo de actor en el Proyecto (D)				
Nombre de la organización, institución o empresa				
RUT de la Organización				
Tipo de Organización	Pública		Privada	
Dirección				
País				
Región				
Ciudad o Comuna				
Fono				
Fax				
Email				
Web				
Tipo entidad (E)				

(D), (E) : Ver notas al final de este anexo

FICHA ORGANIZACIONES PARTICIPANTES O BENEFICIARIOS DIRECTOS

(Esta ficha debe ser llenada por cada una de las organizaciones, instituciones o empresas que participan y/o están vinculadas al proyecto)

Tipo de actor en el Proyecto (D)				
Nombre de la organización, institución o empresa				
RUT de la Organización				
Tipo de Organización	Pública		Privada	
Dirección				
País				
Región				
Ciudad o Comuna				
Fono				
Fax				
Email				
Web				
Tipo entidad (E)				

(D), (E) : Ver notas al final de este anexo

(Se deberá repetir esta información tantas veces como números de participantes o beneficiarios directos participen y/o estén vinculados al proyecto)

(D) Tipo de actores en el proyecto (Organizaciones)

Actores → Agente postulante o Ejecutor
→ Agente(s) Asociado(s)

→ Beneficiario Directo: Empresa y/ Organización vinculada al Proyecto
→ Empresa productiva o comercial
→ Organización o Asociación de productores

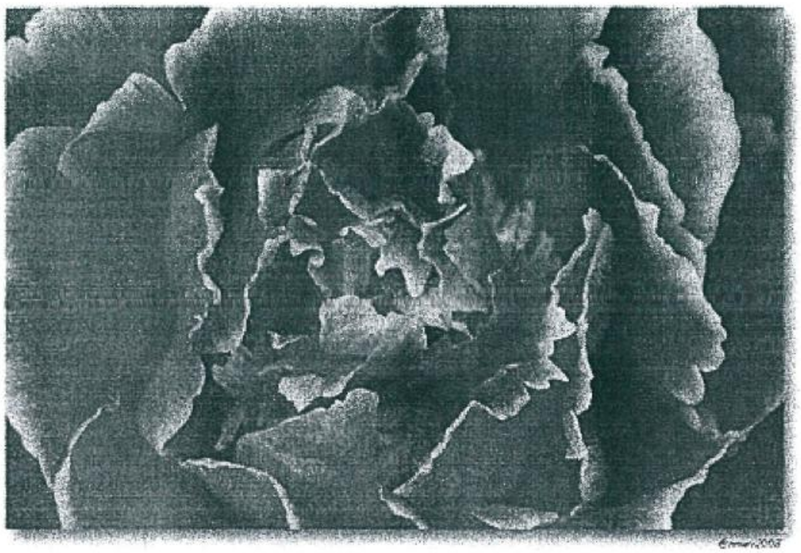
(E) Tipo de entidad

Universidades Nacionales
Universidades Extranjeras
Instituciones o entidades Privadas
Instituciones o entidades Públicas
Instituciones o entidades Extranjeras
Institutos de investigación
Organización o Asociación de Productores pequeños
Organización o Asociación de Productores mediano-grande
Empresas productivas y/o de procesamiento
Sin clasificar

ANEXO 3 : Estudio de Mercado FBI

En Digital (ver archivo adjunto)
Market research Peonies in the Netherlands. FBI (Flowers Best Interest) BV.

Market research Peonies



in the Netherlands

2008

FBI (Flowers Best Interest) BV

Market research Peonies

in the Netherlands

2008

FBI (Flowers Best Intrest) BV
Rietwijeroordweg 15
1432 JG Aalsmeer
The Netherlands

Ing. E.T.T. de Looze
J. van Staaveren
Ing. F. O. Muilwijk

CONTENTS

1 Preface

Vital Berry Marketing S.A. was established in 1989 by six raspberry growers from the south of Chile. Their original goal was to grow, pack and ship the best quality raspberries from Chile and provide the best service to their customers.

Subsequently, due to the excellent service provided, the outstanding reputation earned by the VBM label and the frequent orders from satisfied customers, Vital Berry decided to become the best exporter of berries and exotic fruits from Chile with 25% of its exports produced by its own shareholders.

The company is committed to quality, reliability and service. For this reason they are continuously developing new agricultural technology aiming to supply top quality products.
Growing Peonies is a logical result of this commitment and shifting to flowers made the management realise that this is new to them. Since The Netherlands as a country has some years of experience in growing and transporting flowers they decided it was now time to look for specific flower help.
Flower Best Interest (FBI) is a Dutch based consultancy firm which has world wide experience in growing cut flowers. The consultants are flower growers with international hands on experience and have specialised in national and international post harvest technology, throughout the last 20 years.

During the initial FBI visit, in October 2007, was clear that both companies have the same attitude towards doing business and very much speak the same language. VBM realised that they are lacking vital marketing information and this report is written to be used as a basis for their mid and long term strategic planning.

It is only the second result of the young cooperation and will not be the last as FBI is exceptionally pleased to have VBM as their client.

As every long journey starts with a first and a second step FBI very much appreciates the faith given by VBM and look forward to continue this voyage making them also the Vital Berry Best in flowers.

2 The Netherlands

The Netherlands is located in the west of Europe and is one of the smallest countries of the EU. It is one of the most densely populated countries 486 people per km2 and borders with Germany in the east and Belgium in the south. The North Sea at the west side is separating Europe from The United Kingdom.

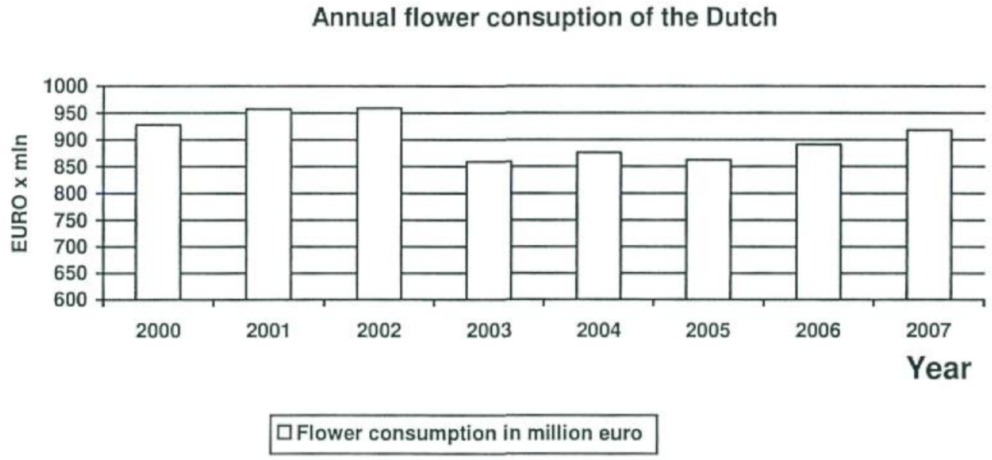
The annual population growth is almost zero and increased by 0.28% in 2007 to 16.4 million inhabitants. The average household is 2.25 people there are in total 7,3 million households. Over the last decades the number of households increased by 1% per year, whilst the number of people per household declines. It is expected to drop to 2.07 in 2030.

In 2007 the number of single person household increased to 35%. At the same time people grow older and since the baby boom just after the second world war it is expected that in the year 2030 25% of the population will be 65 years and older. As this market segment buys a lot of flowers it is expected to compensate the effect of the single households.

The economy grew a little faster than the rest of the EU, the GNP was +3,5% compared to 2,4% of the rest of the EU. Inflation remained low at 1,6% in 2007 which is lower than the rest of the EU who averaged 2,1%. The unemployment rate decreased from 5.5% in 2006 to 4.5% in 2007.

2.1 Total market for flowers

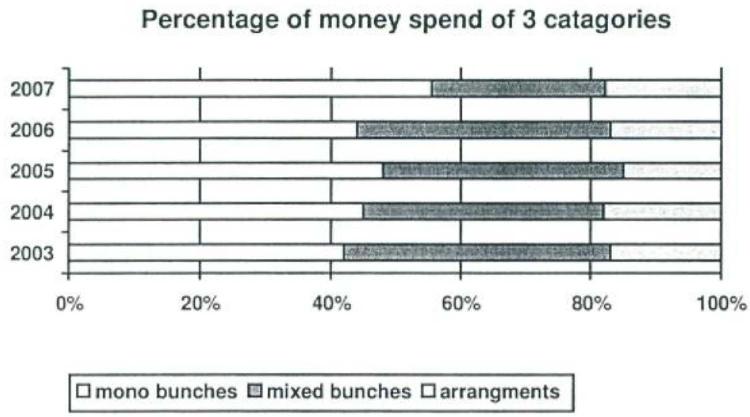
The total market size for flowers and pot plants was in 2007 € 1.481 million, which is a 4% increase compared to the year before. The total market for flowers is € 918 million and experienced a 3% increase.



The last 5 years show an increase in flower consumption after the 2003 drop. The main reasons for that drop was that people deem to have less money to spend and consider flowers expensive. The quality of flowers is the main reason to buy flowers.

2.2 Flower consumption by category

We can differentiate 3 categories in flower consumption; Mono bouquets, mixed bouquets and flower arrangements. The year 2007 showed a remarkable increase in mono bouquets, 56% of all money spend on flowers was spent on mono bouquets. The highest ever and a big difference compared to 2006. It is unknown what has caused it and if we can consider it a new trend.
27% of all money spend was on mixed bouquets whilst 18% was used for flower arrangements.



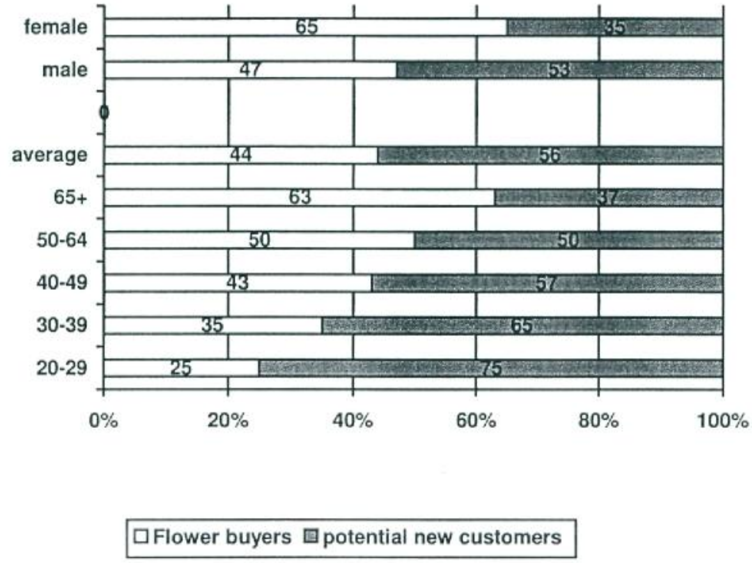
Traditionally flowers have a solid base as a gift, 55% of all money spend on flowers was purchase as a gift. Flowers have the number 1 position in the top 5 of most popular gifts under € 13.50. Out of a panel study done in 2005 it was clear that the main reason to give flowers remains celebrations of birthdays. Other reason to give flowers are to express; appreciation, respect, love and friendship.
75% of all flowers are sold to individuals and 25% to companies.

2.3 Flower consumption by age and sex

The consumption level per capita is depending on age and sex but averages € 43.00 per year which is a slight increase compared to 2006. Of the total population 44% have bought flowers, if we focus on the age group 65+ this number is 63%.
If we look at sex it is clear that most flowers are bought by females, 65% of all women bought flowers compared to 47% of all men.

Frequent flower buyers, mainly women, buy flowers at least every 14 days to decorate their own house or to make themselves happy. They consider it a normal thing to always have flowers in their house. What they buy and where they buy is quit impulsive, they love to spend time looking around and take a lot of time and care in the actual purchase. Male buyers, from the same frequent buyer group, barely buy flowers for themselves. They predominantly have a concrete purpose in mind before they go shopping, take less time and prefer to leave the final choice of the contents to the shopkeeper.

Percentage of money spend on flowers



2.4 Flower consumption by companies

There are over 750.000 companies in The Netherlands and the number increases annually by 2%. The lion share (686.650) are companies with less than 10 employees (92%), more than 50% of that group actually only have 1 employee.

The second group (53.095) are companies with 10-100 employees and represent 7% of the total. The third group (6.615), are the large companies with 100 and more employees which, represent only 1% of the total number of companies. The total number of companies in the last two categories declines annually by 1-2 %

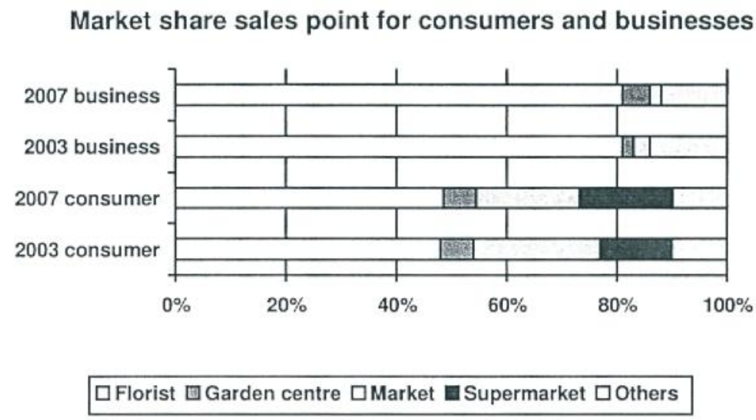
A study done in 2007 indicated that 75% of all companies of 10 employees and more buy flowers and plants on a regular basis, a small decrease compared to 2003. It also showed that 6% of the small companies (< 10) buy flowers on a regular basis, a significant increase of 13%.
Most service-orientated companies and hotels buy flowers. They buy them to decorate their office (35%), because it looks cosy (51%) and also because it improves the quality of the air (5%) as well as the mental condition of their employees (5%).
Two Thirds of all companies (+10) mention buying flowers to celebrate birthdays of colleagues.

3. The Dutch flower distribution

Chapter 3 describes all players in the Dutch flower industry and is not just specifically Peonies. It starts with the purchase behaviour of the consumer since it is essential to know their habits in order to fully understand the rule of the different players.

3.1 Local market

Three major players dominate the Dutch flower sales: florist, street market and supermarkets. Apart from those you also have garden centres, petrol stations and various others.
Florists have the biggest market share whilst the street market is the second largest player and the supermarkets come third. After many years of stagnated turnover the supermarkets now have experienced some increase whilst the street market has lost a little turnover every year for the last 3 years.
In the table below we have indicated the differences between the consumer and the business market, whilst comparing 2007 and 2003.
This paragraph will describe the importance of each player starting from the auctions.



3.1.1 Auctions and direct sales

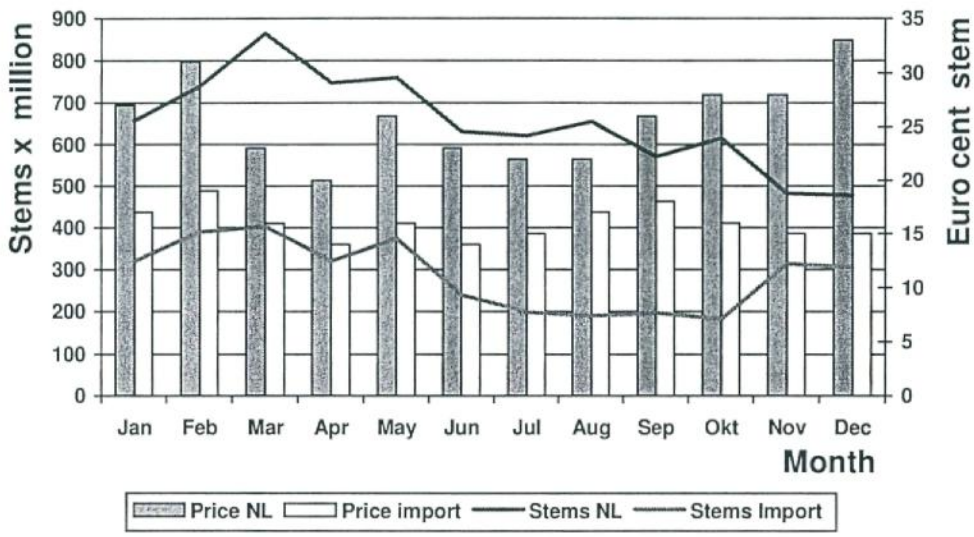
There is a general worldwide misconception about the function of the Dutch flower auctions. They only facilitate by bringing flower sellers (growers) and flower buyers together. They are not the market and you cannot sell to the auctions. After last years mergers there are only 3 auctions; auction FloraHolland (7 auctions buildings), auction Plantion (2 auctions buildings), and Tele Flower Auction (TFA).
All auctions except for T.F.A., a private auction, are united in the VBN (United Flower Auctions; in Dutch Verenigde Bloemenveilingen Nederland). They have 9 auction buildings spread all over the country and facilitate sales of flowers, garden plants and potted plants via various clocks as well as direct sales without using the clocks. The 2 biggest auctions buildings are in Aalsmeer and Naaldwijk.
The VBN reports annually about the sales and turnover and this report is still the price-setting factor in the direct markets in Holland and other markets around the world.

Some 20 years ago the auctions covered almost 95% of the total Dutch flower market but due to many reasons their market share is decreased significantly to an estimation of 60-70%.

The turnover of the VBN increased by 2% to € 2.500 million in 2007. The number of stems remained the same (11.300 million) but the average price went up by one cent to €0.23. The import percentage increased by 4% whilst the average annual price remained the same (€ 0.16).
The Dutch volume decreased by 1,4% but the price remained the same € 0.25.
0,8% Of the total number of stems auctioned were not sold at the clock and went for destruction 2/3 was imported and 1/3 of Dutch origin.

Stems sold per month vary a lot as indicated in the table below. The table indicates all flower all lengths and all qualities sold at the VBN in 2007 specified by origin (Dutch and import).
Also the number of stems on a flower or variety level differs greatly. Some varieties have almost no import whilst other varieties are for 95% imported.

Stems sold at the VBN from Dutch and import growers



Nowadays a lot of flowers traded in Holland are not sold via the auction but the market (bouquets makers, importers) and growers have direct contracts.

3.1.2 Whole sales

A large number of different companies fall under this group; Bouquets makers, Wholesalers, Cash and Carries, Flower traders at the auctions, and flying Dutchmen.

Bouquet makers purely produce for supermarkets, they buy mainly at the clock, via flower traders and have direct deals with bigger growers/ group of growers.
Wholesalers and Cash & Carries are mainly located at and around the auctions, they are an ideal place for smaller florists. In facts most florists have stopped buying direct at the clock.
Flying Dutchman are small entrepreneurs who buy at the clock twice a week and drive their flowers to flower shops mainly in Germany and the UK

3.1.3 Florists

Dutch florists do not only sell flowers however out of their total turnover 56% (€ 339 million) is generated by cut flowers. 90% Of the florists also sell to companies and the majority is positive about the turnover for 2008 and think the percentage flowers will increase.

Main reasons to buy at a florist is because they have a wide range of flowers, good quality and convenience.

3.1.4 Supermarkets

The number of supermarket has significantly decreased to a total of just fewer than 5.000 shops over the last 4 decades, only 20% survived. Mainly the smaller (<400m^2) have closed doors and this is expected to continue. The larger supermarkets (1000-2.500 m^2) are growing in numbers and there is a total of 52 so called hypermarkets (>2.500 m^2).

Demographical factors have resulted in convenient shopping to be the main reason for consumers to visit the supermarket. Almost all flowers are bought (€ 120 million) for own use. Flowers from the supermarket are in general not bought as a gift.

Supermarkets have a bigger focus on better flowers than ever and consider it a useful tool to change the appearance and atmosphere of the shop.

The biggest supermarket chains are: Ahold (840 * Albert Heijn + 443 * C1000), Casino NL (315 * Super de Boer), Superunie (joined purchase forces) 1,800 shops with franchise formulas like Hoogvliet, Deen and Jumbo. The last one is the biggest in turnover of flowers, followed by Albert Heijn.

3.1.5 Garden centres

Apart from a few large chains who franchise their concept like Intera tuin, Groenrijk, Life and Garden there are many individual entrepreneurs. 570 Companies are registered garden centres and have a total of 675 shops in which they turnover € 2.800 million. They sell many more products than just flowers, in fact flowers is only 5% of their annual turnover.

2007 was a very successful year and their average turnover increased by 12% in 2007.

3.1.6 Street market and street vendors

There is no recent information available about the position for flowers in this group. The total registered companies are 24.470 (2007) and out of that 1.700 businesses only sell flowers, potted plants and garden plants.

It is not surprising they only sell to consumers and not to businesses. As they have open stalls selling at different market places they sometimes suffer in winter. If the temperate drops too low in winter they can not operate. This does not happen often.

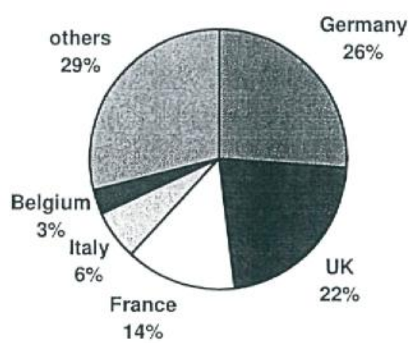
3.2 Export

Apart from a big local consumption The Dutch also play a major rule in the export and re-export worldwide. In 2007 there were 930 export companies registered, the actual number is decreasing and many companies have joined forces of the last years.

Export of flowers increased in 2007 by 4% to a staggering € 3.374 million. Export has become a major share of the flower market and grew an average of 5% over the last decade. Export and re-export of flowers and plants was done by 1.012 companies of which 212 had a turnover exceeding € 5 million.
The export value increase is a result of new distribution channels in existing markets as well as development of new markets. The constant availability, wide range, high quality levels and rapid development into new varieties has helped exporters a lot as well as the fact that they have a very efficient logistical system.
A lot of small wholesalers and just a few large ones operate in a very competitive market. Most of them deal with specific country of export and within that country often just a few players.
Just 21% of all companies take care of 83% of the export. Increase of scale, fewer companies and a high level of professionalism, has been the name of the game and we expect the number of companies to decrease even more.

Main export countries are EU members with Germany (1), The United Kingdom (2) and France (3) in the top 3 covering 59% of the total value.
Non-EU members are Russia, the USA and Switzerland. Some new growth is to be expected in former eastern European countries like Poland, Hungary, Tech republic and Slovenia.

Export of Dutch flowers



4 Peonies

The **peony** or **paeony** (***Paeonia***) is the only genus in the flowering plant family **Paeoniaceae**. They are native to Asia, southern Europe and western North America. Most are herbaceous perennial plants 0.5–1.5 meters tall, but some are woody shrubs up to 1.5–3 meters tall. They have compound, deeply lobed leaves, and large, often fragrant flowers, ranging from red to white or yellow, flowering late spring and early summer. There are single en double flowering varieties, the first one has less flower petals and the stamens are visible. In the past, the peonies were often classified in the family Ranunculaceae, alongside Hellebores and Anemones.

The peony is named after Paeon or Paean, a student of Asclepius, the Greek god of medicine and healing. Asclepius became jealous of his pupil; Zeus saved Paeon from the wrath of Asclepius by turning him into the peony flower.

In total there are about 30 herbaceous species and 10 woody specious, annex 2 lists them all.

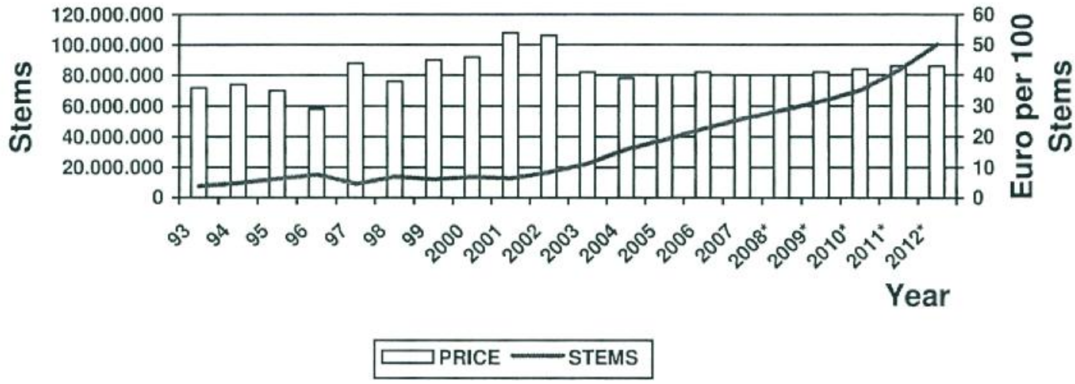
Scientific classification	
Kingdom:	Plantae
Division:	Magnoliophyta
Class:	Magnoliopsida
Order:	Saxifragales
Family:	**Paeoniaceae**
Genus:	***Paeonia***
Specie:	Lactiflora or officinalis
Variety:	

The Dutch auctions have registered 100 commercial varieties. The P. lactiflora group is the biggest by far. The other listed group is P. officinalis and the last group is P. others. The most important varieties are listed in Annex 3.

4.1 total Peonia market

The general market information till now was based on 2007 as this report was written in august 2008. For all statistics on Peonies however we will focus on 2008 facts. Realising that the last 5 months of the year are not included but when looking at the volumes this is not crucial as the lion share of the volume for 2008 was sold already.
Over the last decade the number of stems sold has increased a lot from 13 million in 1998 to 50 million in 2007, the number of stems sold in 2008 (till August) was 51 million stems

Stems sold and average price at the VBN



The turnover in 2007 via the VBN is € 20.552.000 and ranks it cut flower number 18 in the total 153 flowers. The value of import was in 2007 € 1.882.000 which ranked as import flower number 34 out of a total of 84 flowers.
The import share of 3.5 million stems at an average price of € 0.53 (2007) makes import to be only 9.2% as a percentage of the total market.

Taking the annual increase into account we can safely conclude that the price has remained very stable. We expect the price and volume to develop as indicated in the graph and to hit 100 million stems in the year 2012. More flowers will be sold outside the traditional window. Due to this effect and due to the increasing efforts of the Dutch growers to improve quality we expect the average price to go up by 3 cent in 5 years.

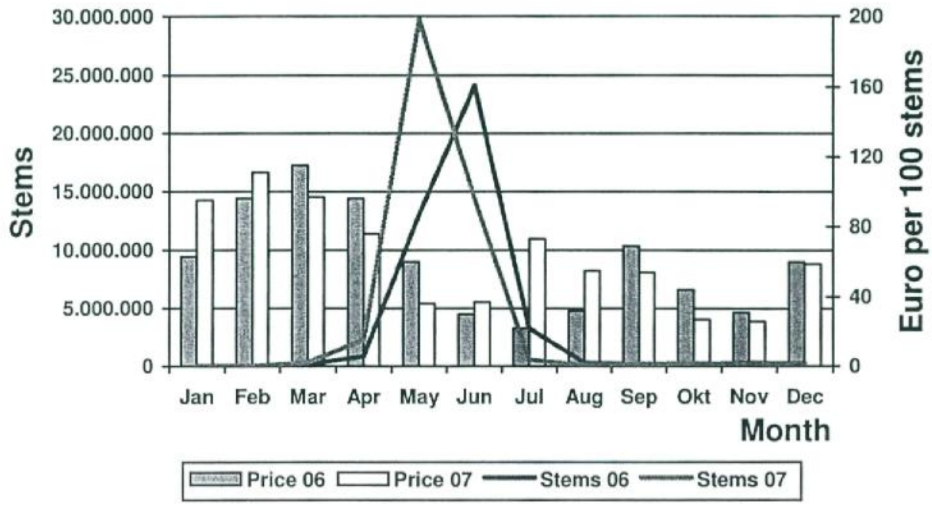
The biggest peonies producing country is The Netherlands (Holland) selling annually just under 48 million stems whilst the total amount of stems imported is just under 3.5 million. The average price of all Dutch stems is €0,39 whilst Import was fetching €0,54 based on 2007 year round average prices.

Production from Israel, France, Germany, Hungary, Poland, Tunisia, Italy, Portugal, Chile, UK, Ireland, China, Belgium, Turkey and Australia were imported to start the season a little bit earlier whilst Poland, Hungary, supplement the Dutch production because of low labour cost.
The effect of the Dutch tunnel / green house production is reducing the economics of the French and Italian out door production.

Origin of Peonies sold in The Netherlands

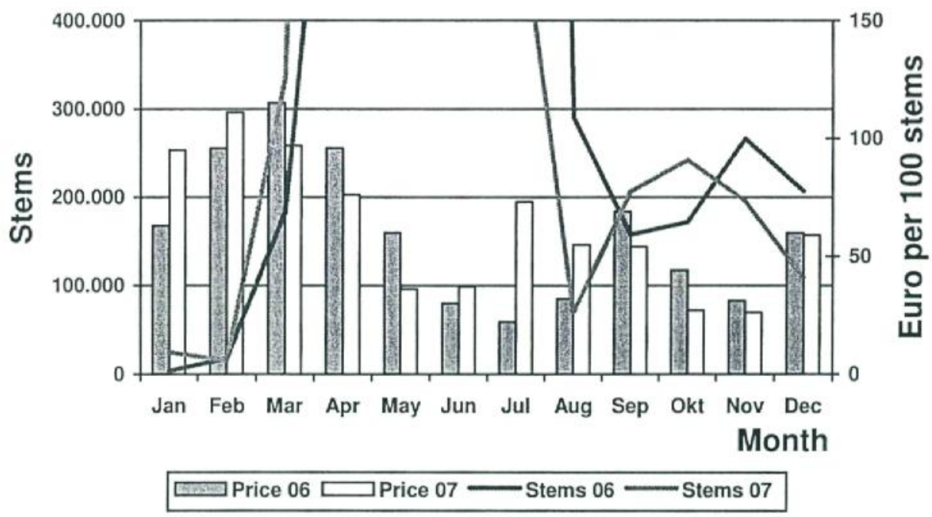
The Dutch market for Peonies remains a typical spring flower crop with the majority of stems being produced / sold in a period of 8 weeks. Some stems before and after but no real year round availability like many other flowers. The majority of all Dutch stems is grown in the open and a small percentage is grown in tunnels and non-heated green houses.

Monthly volume and pricing over the last two years



When focussing on the supply on the period after the big production peak in May and June it is clear that very little amounts are sold in the off-season. The volume in the off-season is very low and because of the different countries of origin the quality is not uniform and the price unstable.

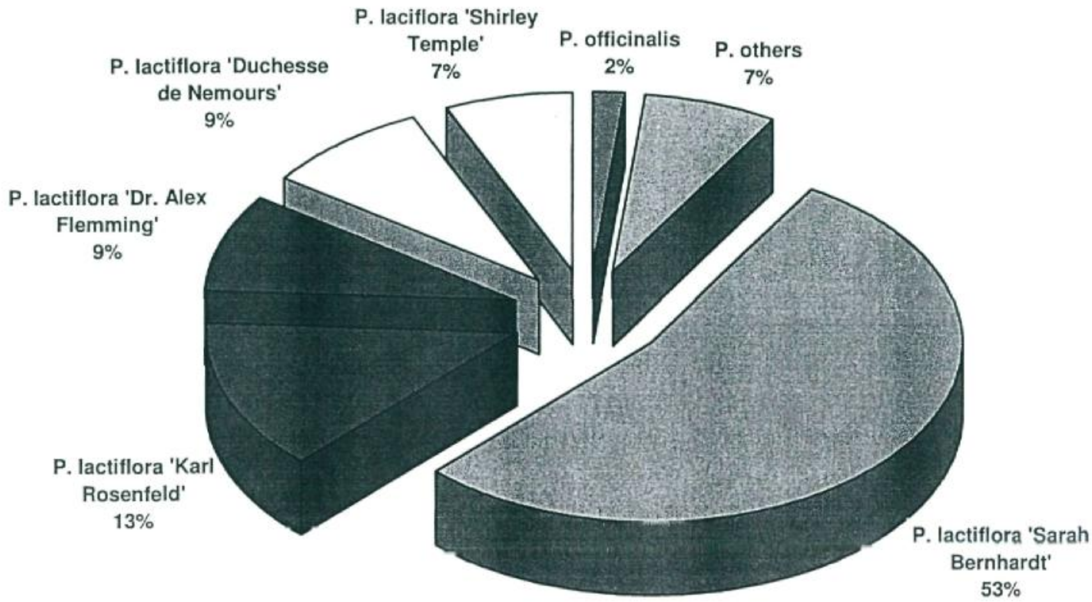
Monthly volume and pricing in the off-season



4.2 most important varieties

The biggest varieties sold are 'Sarah Bernard', Karl Rosenfeld', 'Dr. Alex Fleming', 'Duchesse de Nemours' and 'Shirley Temple' together they represent 68% of the total number of stems sold in 2007. We expect many new varieties to come in the coming 5 years but do not anticipate the top 5 to be any different.

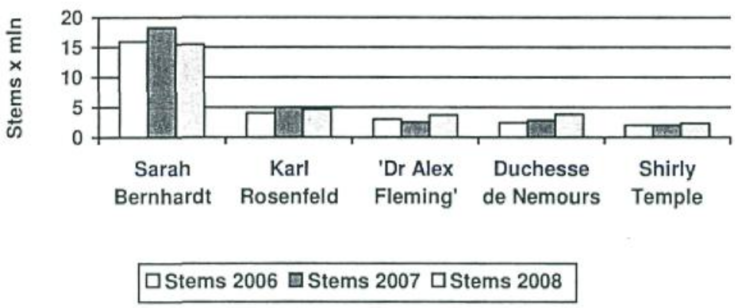
percentage of stems sold in 2007

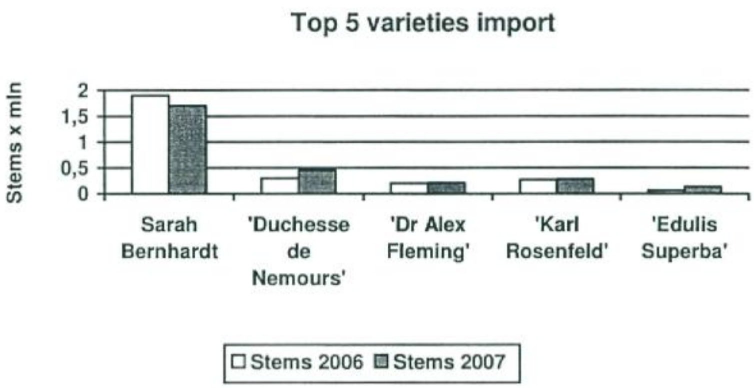


If all varieties are grouped per colour one can see that pink (53%) and Purple (22%) cover 75% of all stems. The remaining 25% is for White (16%), Red (4%), yellow (1%) and others (4%). Because of the slow reproduction speed of Peonies in general this grouping has been the same for many years. This is also the reason why new varieties take a long time to reach a significant volume in the market.

There is a difference in top five if we compare Dutch Peonies to import Peonies. Check the following 2 graphs on the top five and list of all varieties sold at the VBN.

Top 5 varieties Dutch grown





Average price of the top 5 varieties sold at the VBN, price in Euro cent per stem is listed below. The 2008 facts only include stems sold till august so do not represent the whole season.

	NL 2007	NL 2008*	Import 2007	Import 2008*
'Sarah Bernhard'	38	38	59	61
'Karl Rosenfeld'	25	24	25	35
'Dr. Alexander Fleming'	36	39	38	51
'Duchesse de Nemours'	72	63	77	79
'Shirley Temple'	30	31	38	50

Price indications for out of season Peonies, given by the flower traders interviewed during this study range from 50 to 80 Euro cents per stem under the condition that the quality is A1 and the supply is consistent.

4.3 Most important quality aspects of Peonies.

When selling via the auctions Peonies are bunched by 5 and graded by length with 5cm intervals; so 40, 45, 50, 55, 60 and 65 cm. Sleeved per bunch. There is no indication on the clock for disbudded (standard) and non-disbudded (spray) bunches.
The buckets have to contain water with Florissant 500 or Chrysal SVB.

The price difference between stems sold without any quality remark (A1) and 1 or 2 quality remarks is huge. Consistency of supply is crucial to have successful sales.

The best period of sales for out of season Peonies is from September until March. With a firm drop in demand over the weeks 51 till 2 as the flower business in general is down over the Christmas and New Year.

The top 4 of quality problems in Peonies are linked to opening of flower, uniformity and diseases.

1. Opening of flowers is the main complain when asking consumers and florists about their hesitation to buy/sell peonies in the off season. This is the weakest point and caused by either not opening in the vase or too fast opening in the retail phase.

2. Uniformity in presentation; with Peonies it is crucial that all stems have the same opening stage within the bunch and also between bunches of one lot/variety. Most varieties do not open at all when harvested to tight with other varieties it causes big timing differences between the actual opening of the different flowers on the vase. If auctioned with a quality remark for uneven pick stage can result in a price drop of 70%.

   Below the 5 different stages of opening used at the Dutch auctions. Stage 2-3 is what is recommended at the time of selling/auctioning sales which implies stage 1-2 is what should be looked for when harvesting; the indicated variety is Sarah Bernhard.

1. stage 1

2. Bud fully grown and soft

3. Some petals loose

4. Bud not yet open

5. stage 5

3. Botrytis free; mainly caused by mechanical damage in combination with high humidity during storage and transport
4. General leaf damage; caused by climatic conditions or mechanical damage during processing.

4.4. Most important importers and traders of flowers.

The following list is a list of the most important flower importers who are/were involved in Peonies import and in some cases are experienced in container transport.

Company	Experienced in Peonies import / trade	Experienced in trade with Chile	Experienced in container transport
Oudendijk	☺	☺	☺
Van Leeuwen Import handling	☺	☺	☺
Novaflor	☺	☺	☺
Decofresh	☺	☺	☺
Rotoflowers	☺	--	--
Auction Flora Holland import department	☺	☺	--
Auction Plantion	☺	☺	--
Auction TFA	☺	--	☺
OZ Import	☺	--	☺
Fleuroplus	☺	--	☺

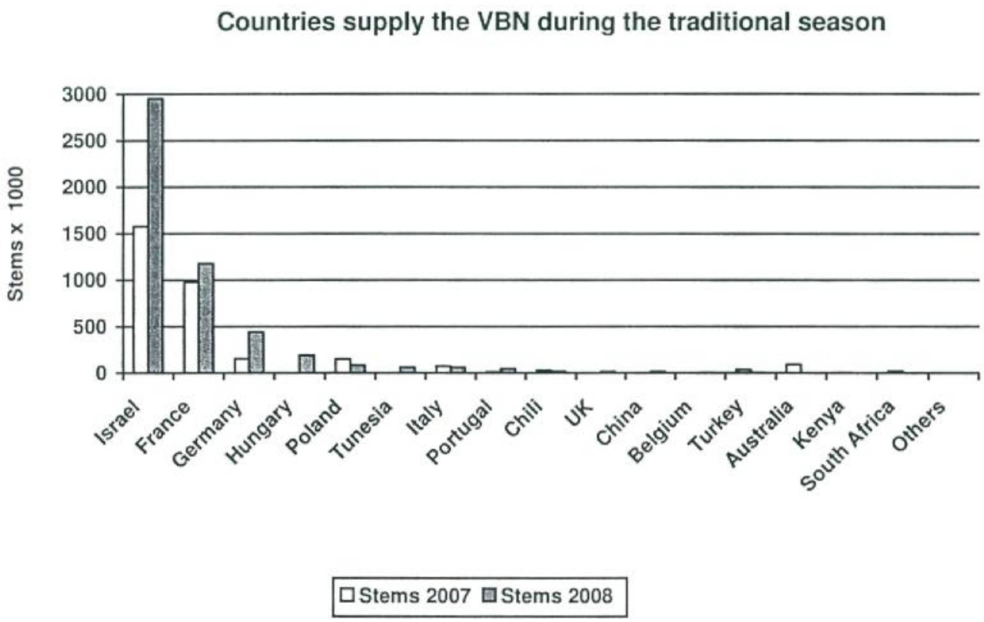
Optimal connection	--	--	☺
Rotoflowers	☺	--	--
BSI	☺	--	--

5 Production centres outside The Netherlands

(Who sell Peonies via the VBN)

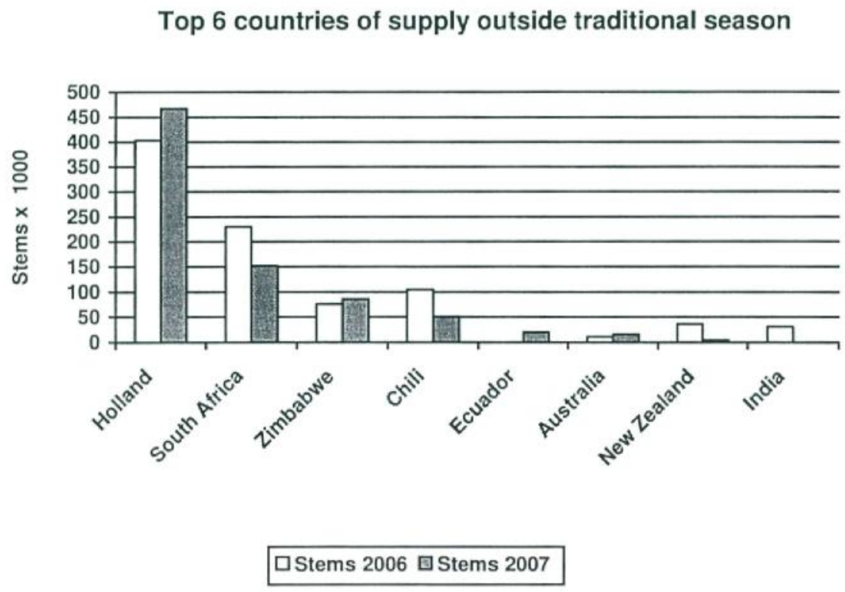
Because of the typical supply of Peonies and because of the printing date of this report we have split the annual sales in 2 halves.
The first half is the traditional production season in which the Dutch production is sold and the second is when only import is sold. I have left out the Dutch produce volume in order to have a more clear picture of the real competition for VBM. Kindly note the first half is based on 2007 + 2008 whilst the second half is based on 2006/2007.

5.1 Main production areas during the traditional Dutch production season. (from January till August 2007/ 2008)



5.2 Main production areas of out of season peonies from August till January 2006/7.

The table below lists the main import countries in the second half of the year and consist of Peonies sold outside the traditional Dutch Season for the year 2006 and 2007.



There are a few bugs in the VBN system as the auction statistics show Peonies from The Netherlands as well as Zimbabwe sold in the of season.
There are no peony growers in Zimbabwe these flowers originate from South Africa. Also the Dutch can not grow in a commercially viable setup and at least 60% so called Dutch Peonies originate from South Africa the balance for Argentina and Chile.

5.3 Analyses of the main producing countries

The Dutch and other European countries can not produce peonies outside the traditional production period in a commercially viable way. Peonies have a very strong biological clock and need a proper winter to induce flowering. Despite all efforts one can not spread the production over more then 2 months.

Analysing the competition for Chile we will need to look at the top 6 of countries listed in paragraph 5.2 who can naturally produce outside the traditional flowering period. Because of the given reasons we have not listed Zimbabwe and The Netherlands.

5.3.1 South Africa

Politically and economically not stable. The exchange rate for the RAND against de EURO has caused problems in the economics of many export companies.
Farms are being taken back by the government on a small scale but landownership is becoming a political issue.
Labour reliability and cost is a concern.

5.3.2 Ecuador

Politically less stable than Chile and due to the absence of seasons peonies are less viable.

5.3.3 Australia & New Zealand
Politically very stable but labour cost and availability are a concern.
Good logistics and infrastructure. Transport cost are relative high.

5.3.4 India
Politically less stable than Chile. Many severe conflicts in different bordering countries, effecting their stability.
Booming economy creating a big middle class market which is starting to consume flowers on a larger scale. Labour availability is however a growing problem.
Export reputation is very poor due to all sorts of quality issues. The infrastructure for sea shipment is not great.

6 Conclusion and objective

We formulate the objective and made a SWOT analysis after which a carefully strategy is formulated. FBI (Flowers Best Interest) would be pleased to clarify the selections made in a face to face meeting. Realising those details will change depending on the objective.

The objective is to make money with the production and export of Peonies initially to Europe and in a second stage maybe also to other parts of the world. By utilising the existing infrastructure and labour force on VBM farms.

6.1 SWOT analysis and strategy definition

The aim of this SWOT analysis is to identify the key internal and external factors that are important to achieving the objective. SWOT analysis groups key pieces of information into two main categories:
* Internal factors – The strengths and weaknesses internal to the organization.
* External factors – The opportunities and threats presented by the external environment.

6.1.1 Strengths

Labour	Disbudding of peonies currently does not result in a better price but the traders consulted for this study indicated to have a preference for disbudded Peonies. Apart from the bigger flower it is much easier to handle as flowers do not tangle causing damage and delay in making a bunch. Because of the available labour on VBM farms this could be favourable for VBM.
Labour 2	Because the harvesting stage is so crucial and labour not too expensive it should not be a problem to harvest 2 or 3 times during the day to ensure uniform pick stage.
Labour 3	Also the labour requirement for Peonies fits very well into the current labour demand.
Climate	The 8 climate zones enable Chile to have a much longer period of natural production when production fields from different zones produce in sequence. VBM has growers in different climate zones which is a huge advantage because it makes the country a much reliable production partner.
Logistics	The close distance from producing farms to international sea ports in combination to the well established infrastructure as well as the desire from the Chilean government to develop more ports is a big advantage.
Distribution	VBM has a solid and well developed reputation in transporting by sea to Europe. This knowledge can be of great importance for Peonies and it can piggyback on the success of the fruits.

6.1.2 Weaknesses

Labour 4	Availability in non traditional areas and well as the average cost of labour comparing to South Africa and Ecuador could be an issue.
Knowledge	Too little hands on knowledge on growing peonies, as well as selecting varieties and timing the production.

Knowledge 2	Hands on knowledge on harvesting and handling Peonies is not jet available with VBM.
Knowledge 3	Hands on knowledge on marketing flowers is relative new for VBM and differs greatly from their current products.

6.1.3 Opportunities

Politics	Chile has a very stable economy and is political much more stable compared to South Africa.
Season	The competition does not have the natural climate(s) to spread production like Chile can do.
Market	The Dutch have created a big market and are unable to supply year round.
Oil	The fast majority of all flower transport is currently done by air. The raising oil prices as well long term availability of crude oil can jeopardize the economics of many flower exporting giants. The location and knowledge of sea transport can really help.
Knowledge 4	A lot of research is done on sea transport of flowers. This information will be made available to the most interesting partners.
Learning curve	Future competitors will also need time to develop Peonies if VBM proofs to be successful
Climate 2	Due to the climate Peonies and other flowers can be grown to complement the current product range and make use better use the existing facilities on farms before the fruits come in production.
Labour 5	The labour requirement for Peonies fits very well into the current labour demand.
Varieties	The production estimation given by VBM lists lot of different varieties. It will be ideal to determine which of them is suitable for sea transport and which produce most stems in the different climates in order to select commercial varieties for commercial expansion.
Image	Chile has no quality related reputation in the international flower market.

6.1.3 Threats

Learning curve 2	Because of the learning curve with any new product VBM will need time to develop themselves as a flower producer.
Learning curve 3	As the production time is only 8 weeks VBM needs to make a good start as the first feed back of the first container shipments will arrive after the first production field have finished harvesting.
Peonies	Have only one cycle per year and the slow development of new varieties as well as the slow multiplication rate of existing varieties might dictate a different speed of development than required by the strategic plan.
Fashion	If Peonies are not fashionable any more in the off season VBM will need to promote the flower in a big way. This is not likely to happen because the Dutch have developed a big market for only a few months of the year creating also a big demand for the rest of the year.

Plants	Cheap plant materials as well as widly available plant material are a big chance to plant the wrong variety.
Image 2	As Chile has no quality related reputation in the international flower market the potential image will also depend on other growers from Chile.

6.2 Conclusion and strategy

Chile has a great potential to grow and market Peonies outside the traditional window (European season) and should focus on delivery in the months October, November, December, January, February and March.

Sea freight and the fact that Peonies can be stored well will help lowering the freight cost as well as improving the internal and external quality.

Product

VBM should, in our view, cater for the highest quality players in Europe by sending disbudded pre-selected flowers which should be re-graded and bunched in The Netherlands. Only in this way the highest prices can be established.

The variety choice should be based on variety demands in the market and on vase live testing after transport or transport simulation. It is recommendable to go for a mix of old established and some newer varieties and a good balance in the colours red, white, pink and purple. Extra focus on white and red for the months November, December, January and February may be sensible since during Christmas and Valentine these colours are in bigger demand.
Avoid having too many different small varieties and do not grade too many lengths. Avoid single flowering varieties and varieties which produce too small heads and/or open too quickly like: Flame and Karl Rosenfeld.

One should try to have little or no production during weeks 51, 52, 1 and 2 since the market is always depressed over the New Year period.

Always decide new planting on trials done locally, testing vase life after sea transport as well as input from the market.

Price

In order to achieve the highest prices VBM should aim to sell most flowers to the florists avoiding having to sell via supermarkets. VBM should have vase life reports ready for the most important varieties proving the actual vase life after sea transport to make sure opening of flowers and vase life is not a question but a fact.

Place

To achieve the objective it is of paramount importance to successfully market Peonies from Chile in the European market through a carefully selected business partner. A local business partner is essential;
1. to meet the high quality demands and specific wishes of the major buyers.
2. to be able to sell an container loads of flowers in a short time frame via the auctions as well as in direct markets.

3. to be able to do a final re-grade using an automated grading machine.
4. To also start developing export markets in other European countries.

Quantity

To achieve profitability the right volumes of the right varieties need to be produced / shipped over a pre-determined period to make sure a critical mass enables VBM to have a consistent flow and quality.

This critical mass should last for several months to reduce the impact of competition who can only supply a short period.

Production in the different climate zones and altitudes in a specific zone need to be arranged for to have a long production period.

Promotion

It is essential that the market is pre-warned of the availability of the flowers. In practice one could ship the first flowers in advance by air so they can be used to make an introduction for the sea containers to follow. By having the final grading on the spot the different harvesting stages (hard to determine in the field) can be separated and distributed according to the wishes of the customers.

Human resources

Make one key person responsible for the whole project. Make sure the learning curve goes as fast as possible and do not waste precious time fiddling around with impractical tests or creating too much unscientific data.
Hire specialists who know to guide the whole process. Team up with Inia as they have a gathered lot of facts on the effect of varieties in their climate.

Timing

It will be crucial to start selecting the best possible partner based on our list in paragraph 4.4 by starting to meet those who have the most ☺.

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Aalsmeer September 2008

Tjeerd de Looze, Jaap van Staaveren en Floris Muilwijk

Annex 1. Problem definition and objective of the report

VBM wants to have better understanding of the Dutch market for Peonies to make a production planning for the coming years.
FBI will do desk research as well as face to face interviews with key players in the market like traders, buyers, growers and auction people. The final report will be issued in WORD and presented in The Netherlands or on request in Chile (date and time to be agreed upon) travel expenses not included in this contract.
The objectives are listed below.

1. Analyses of the Cut Flower Market
   (size, main species, evolution of the market in the last 5 years and a projection for the coming 5 years)
2. Analyses of the Market Structure
   - description of the distribution channel, size and importance
   - detailed assessment of the most important target markets (characteristics, volume demanded and sold, quality, average prices, seasons, trends, packaging requirements, demanded varieties)
3. Competitor analysis
   (main competition, volume, season, prices, strengths and weakness.
4. Conclusion
   (SWOT analysis and strategy definition).
5. Contact data of 10 possible buyers / importers.

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Annex 2. List of known Peonia species

Herbaceous species (about 30 species)

  - *Paeonia abchasica*
  - *Paeonia anomala*
  - *Paeonia bakeri*
  - *Paeonia broteri*
  - *Paeonia brownii* (Brown's Peony)
  - *Paeonia californica* (California Peony)
  - *Paeonia cambessedesii*
  - *Paeonia caucasica*
  - *Paeonia clusii*
  - *Paeonia coriacea*
  - *Paeonia daurica*
  - *Paeonia emodi*
  - *Paeonia hirsuta*
  - *Paeonia intermedia*
  - *Paeonia japonica* (Japanese Peony)
  - *Paeonia kesrouanensis* (Syrian Peony)
  - *Paeonia lactiflora* (Chinese Peony, "garden peony")
  - *Paeonia macrophylla*
  - *Paeonia mairei*
  - *Paeonia mascula* (Balkan Peony)
  - *Paeonia mlokosewitschii* (Golden Peony)
  - *Paeonia obovata*
  - *Paeonia officinalis* (European Peony)
  - *Paeonia parnassica* (Greek Peony)
  - *Paeonia peregrina*
  - *Paeonia rhodia*
  - *Paeonia sterniana*
  - *Paeonia steveniana*
  - *Paeonia tenuifolia*
  - *Paeonia tomentosa*
  - *Paeonia veitchii* (Veitch's Peony)
  - *Paeonia wittmanniana*

- Woody species (about 10 species)
  - *Paeonia decomposita*
  - *Paeonia delavayi* (Delavay's Tree Peony)
  - *Paeonia jishanensis* (syn. *Paeonia spontanea*; Jishan Peony)
  - *Paeonia ludlowii* (Ludlow's Tree Peony)
  - *Paeonia ostii* (Osti's Peony)
  - *Paeonia potaninii*
  - *Paeonia qiui* (Qiu's Peony)
  - *Paeonia rockii* (syn. *Paeonia suffruticosa*; Rock's Peony or Tree Peony)

Annex 3 Commercial Paeonia varieties sold at the VBN

Variety	Group	Colour	Number of stems sold in 2008
'Alertie'	lactiflora	Purple	324,640
'Barbara'	lactiflora	Purple	162,320
'Big Ben'	lactiflora	Red	129,725
'Bowl of Beauty'	lactiflora	Bicoloured	178,720
'Bartzella'	officinalis	Yellow	31,225
'Buckeye Belle'	lactiflora	Purple	138,336
'Catharina Fontijn'	lactiflora	Pink	292,515
'Charley's White'	lactiflora	White	105,426
'Clare de Lune'	officinalis	Green	47,100
'Coral Beach'	lactiflora	Orange/yellow	19,825
'Coral charm'	lactiflora	Pink	312,299
'Coral sunset'	lactiflora	Red/orange	242,802
'Dr Alex Flemming'	lactiflora	Salmon pink	3,387,955
'Duchesse de nemours'	lactiflora	Cream white	3,271,806
'Edulis Superba'	lactiflora	Pink	508,745
'Felix Crousse'	lactiflora	Pink	225,800
'Festiva Maxima'	lactiflora	White	335,130
'Flame'	lactiflora	Pink	2,442,962
'Gardenia'	lactiflora	White	431,080
'Gilbert Barthelot'	lactiflora	Purple	100,387
'Gold Mine'	lactiflora	Yellow	13,280
'Henry Bockstoce'	officinalis	Red	93,765
'Immaculee'	lactiflora	White	327,800
'Inspecteur Lavergne'	lactiflora	Pink	227,896
'Jadwiga'	lactiflora	Pink	226,176
'Kansas'	lactiflora	Pink	1,210,112
'Karl Rosenfeld'	lactiflora	Bright crimson	5,133,646
'Krinkled White'	lactiflora	White	819,202
'Lady Alexandra Duff'	lactiflora	Bicoloured	168,456
'Louis Van Houtte'	lactiflora	Purple	505,415
'Marie Lemoine'	lactiflora	White	82,173
'Mme Claude Tain'	lactiflora	White	32,930
'Monsieur Jules Elie'	lactiflora	Purple	590,408
'Mothers Choice'	lactiflora	White	146,075
'Nippon Beauty'	lactiflora	Pink	116,630
'Paula Fay'	lactiflora	Pink	439,930
'Pecher'	lactiflora	Pink	79,770
'Peter Brand'	lactiflora	Purple	87,170
'Pink Hawaiian Coral'	lactiflora	Pink	26,835
'Pink Panther'	lactiflora	Pink	446,950
'Red Charm'	officinalis	Red	1,212,083
'Red magic'	lactiflora	Red	171,865
'Red Sarah Bernhardt'	lactiflora	Red	104,380
'Sarah Bernhardt'	lactiflora	Pink	20,471,026
'Scarlett O'Hara'	lactiflora	Pink	156,500
'Sereen Beauty'	lactiflora	White	41,450

'Shirley Temple'	lactiflora	White	2,557,066
'Top Brass'	lactiflora	White	64,715

Annex 4. Important Dutch holidays - flower days

Name	Date in 2009
New-year	January the 1 st
Carnaval	February the 22 nd
Valentinesday	February the 14 th
Womensday	March the 8 th
Good Friday	April the 10 th
Easter	April the 12 th +13 th
Secretaries day	April the 16 th
Queens day	April the 30 th
Ascension day	May the 21 st
Remembrance day	May the 4 th
Liberty day	May the 5 th
Mothers day	May the 10 th
Pentecost	May the 31 st
Fathers day	June the 21st
Diploma day	June the 15 th and later
Do-not-forget-me day	October the 1 st
SinterKlaas	December the 5 th
Christmas	December the 25 th +26 th

Annex 5. List of useful contacts

Auction FloraHolland
Gerard Gardien (Import and summer flower product manager)
Middel Broekweg 29
Postbus 220
2670 AE Naaldwijk
Tel.: +31 (174) 633652
Mob.:+31 (6) 51789746
gerardgardien@floraholland.nl
www.floraholland.com

TFA (Tele Flower Auction)
Michel Onclin (M.D.)
Noorddammerweg 102B
1187 ZV Amstelveen
Tel.: +31 (20) 6569724
Mob.: +31 (6) 15028874
michel.onclin@tfa.nl
www.tfa.nl

Auction Plantion / Veiling Vleuten BV (Import)
Marco Sakkers (Import Manager)
Utrechtseweg 109 c
3544 NA UTRECHT
Tel.: +31 (30) 6779900
Mob.: +31 (6) 53429679
marcosakkers@plantion.nl
www.plantion.nl

Oudendijk bv
Mike Oudendijk (Import Manager)
Mijnsherenweg 4
1424 CB De Kwakel
Tel.: +31 (297) 387802
Mob.: +31 (297) 387838
mike@oudendijk.nl
www.oudendijkimport.nl

OZ Import BV
Jaap Stelder (general manager)
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Tel.: +31 (297) 386552
Mob.: +31 (6) 51408341
jaap.stelder@ozimport.nl
www.ozimport.nl

NovaFlor B.V.
René Vissers (owner / M.D.)
Loosterweg 39C
2215 TM Voorhout
Tel.: +31 (252) 227588
Mob.: +31 (6) 20134192
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Decofresh Holland
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Mob.: +31 (64) 2210709
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Rotoflowers BV
Albert Hopman
Postbus 1376
1430 BJ Aalsmeer
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