Flower bulb industry in England
1990-2010

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contents

1. Introduction
   - flower bulb history: England, Japan and Holland
2. Flower bulb production in Holland, UK and Japan
3. Production and trade in 1990s
4. Production and trade in 2000s
5. Narcissi production
6. Spalding: flower parade and Springfields
7. Conclusions
1. Introduction

• Tulip bulb Production in Japan
  1988: open market
  1993-99: gardening boom effect
  2001-: decline in consumption
    falling and low price
    decrease in production and imports

• England is famous for tulips and narcissi as well as gardening.
Consumption, Import, production in tulip bulbs, Japan

Unit: million bulbs

Unit: yen

Price of tulip bulbs
History: England

• At Spalding in England, Production began at the end of the 19\textsuperscript{th} century, with small plots of snowdrops and daffodils. The first tulips were grown, on a field scale, between 1905 and 1910. (A cargo of tulips arrived in Antwerp in 1562 and by 1578 they were growing in England)

• In June 20, 1916, Spalding Bulb Growers’ and Market Gardeners’ Association was formed. note: Braybrooks(2007)
In 1910 a small amount of tulips was imported here through the ‘Trading Company Yokohama’. In 1918 Bunzo Mizuno stared experimenting with a few tulip-bulbs. He mainly aimed at the production of cut flowers. From 1923 his flower-bulb company delivered bulbs from Toyama to the whole of Japan.

In 1924, they joined their efforts and stared cooperating. This led to the foundation of the ‘Toyama Tulip-bulb Growers Association’(1938).

note: Beenakker(2000)
History: The Netherlands

• Around 1600 the commercial cultivation of tulips was started and a small scale on the well drained land of coarse-grained sand in surroundings of Haarlem.

• Tulip mania: 1634-37

• Hyacinth bubble: 1707

• Tulip bubble: 1734-39

Note: Beenakker(2000)
## 2. Flower Bulb production in Holland, UK and Japan

### Netherlands

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Spring Flowers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tulips</td>
<td>6,086</td>
<td>7,128</td>
<td>9,405</td>
<td>10,372</td>
<td>9,859</td>
<td>10,562</td>
<td>9,856</td>
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<tr>
<td>Narcissi</td>
<td>1,523</td>
<td>1,652</td>
<td>1,496</td>
<td>1,940</td>
<td>1,739</td>
<td>1,673</td>
<td>1,578</td>
</tr>
<tr>
<td>Hyacinths</td>
<td>827</td>
<td>933</td>
<td>1,076</td>
<td>1,154</td>
<td>1,225</td>
<td>1,299</td>
<td>1,235</td>
</tr>
<tr>
<td>Total</td>
<td>9,917</td>
<td>11,127</td>
<td>13,568</td>
<td>15,139</td>
<td>14,360</td>
<td>14,689</td>
<td>13,822</td>
</tr>
<tr>
<td>Summer Flowers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gladioli</td>
<td>1,903</td>
<td>1,711</td>
<td>1,643</td>
<td>1,190</td>
<td>915</td>
<td>774</td>
<td>722</td>
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<tr>
<td>Lilies</td>
<td>2,667</td>
<td>2,560</td>
<td>3,539</td>
<td>4,520</td>
<td>3,844</td>
<td>3,875</td>
<td>3,681</td>
</tr>
<tr>
<td>Dahlias</td>
<td>368</td>
<td>431</td>
<td>480</td>
<td></td>
<td></td>
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<tr>
<td>Total Bub flowers</td>
<td>16,758</td>
<td>15,827</td>
<td>18,336</td>
<td>20,849</td>
<td>19,119</td>
<td>19,338</td>
<td>18,225</td>
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### UK

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</thead>
<tbody>
<tr>
<td>Flowers Bulbs in the Open</td>
<td>5,337</td>
<td>5,899</td>
<td>6,200</td>
<td>6,293</td>
<td>5,726</td>
<td>6,100</td>
<td>4,690</td>
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<tr>
<td>bulbs in the open</td>
<td>5,385</td>
<td>5,727</td>
<td>4,107</td>
<td>4,660</td>
<td>4,377</td>
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<tr>
<td>Narcissi</td>
<td>4,013</td>
<td>3,972</td>
<td>4,334</td>
<td>3,530</td>
<td>3,900</td>
<td>4,079</td>
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<tr>
<td>Tulips</td>
<td>269</td>
<td>111</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gladioli</td>
<td>110</td>
<td>253</td>
<td>70</td>
<td>130</td>
<td>234</td>
<td></td>
<td></td>
</tr>
<tr>
<td>others</td>
<td>1,303</td>
<td>1,140</td>
<td>533</td>
<td>630</td>
<td>64</td>
<td></td>
<td></td>
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</tbody>
</table>

### Japan

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</thead>
<tbody>
<tr>
<td>bulbs</td>
<td>1,524</td>
<td>1,160</td>
<td>995</td>
<td>597</td>
<td>575</td>
<td>567</td>
</tr>
<tr>
<td>tulip</td>
<td>625</td>
<td>484</td>
<td>430</td>
<td>282</td>
<td>261</td>
<td></td>
</tr>
<tr>
<td>Lilies</td>
<td>408</td>
<td>257</td>
<td>218</td>
<td>100</td>
<td>96</td>
<td></td>
</tr>
</tbody>
</table>


In 1990s, flowers and bulbs in the open fluctuated but were stable in filed area.
In 1990s, cut flower production decreased every year in area. Bulb production, as well as narcissi, increased until 1995 and decreased.
In 1990s, in value term, bulb production decreased after 1993.
3. production and trade in 1990s (4)

In value term, Narcissi decreased after 1996.
In 1990s, bulb imports increased.
In 1990s, exports of narcissi bulbs increased.
3. production and trade in 1990s (7)

Net Export - value (unit: 1,000 pounds)

In 1990s, bulb net export of narcissi have kept constant. Net imports of total bulbs increased year by year.
In 1990s, production of cut flowers decreased.
3. production and trade in 1990s (9)

In 1990s, net imports of cut flowers increased.
In 1990s, exports of cut flowers fluctuated and increased, although the exports are in a small scale.
In 2000s, the production kept constant and then increased.
In 2000s, Bulbs import increased rapidly. Bulbs export increased until 2007.
In 2000s, Import of cut flowers increased rapidly and then was stable.
4. Production and trade in 2000s(4)

From vegetables and flowers, England

Bulbs & flowers grown in open

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<tr>
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</thead>
<tbody>
<tr>
<td>Bulbs</td>
<td>5,180</td>
</tr>
<tr>
<td>Gladioli</td>
<td>160</td>
</tr>
<tr>
<td>Narcissi</td>
<td>3,830</td>
</tr>
</tbody>
</table>

In 2000s, bulbs production had an increase trend, especially in narcissi and gladioli.
Dutch narcissi (ex. Cyclaminieus, Double, Trumpet) are mainly small ones and one year old flowers. British narcissi are mainly large ones and two years old flowers. The difference comes from the soil, price and quality conditions. Dutch farmers make a variety of flowers and do not like relatively cheap narcissi.
5. Narcissi production (2)

a machine of Narcissus bulb production. It looks like old and means low depreciation cost.
5. Narcissi production (3)

- Crop rotation in England: 10 years
  narcissus 3 years + vegetables 7 years
  (stable income + changeable income)

  Ex. 1. Planting bulbs, 2. no flowers, 3. Flowers + harvest bulbs, 4. wheat, 5. wheat, 6. potatoes, 7. califlowers, 8. peas, 9. sugar beet, 10. wheat (barley)
  cultivated unit area: 5 ha, total area 50 ha

Netherlands: narcissus + other flowers
( on sandy soil)
6. Spalding(1) Flower Parade

2011 Spalding Flower Queen, April 30 2011.
On May 9, 1959, the first Flower Parade took to the streets of Spalding.
6. Spalding(2) Springfield-1

6. Spalding(3) Springfield-2

Springfields Outlet Shopping since 2004.
SHS gets the rent and spends it for the garden.
7. Conclusions

- Production
- Farmer’s income
- Marketing and Supply chain
- Consumption and trade
- Consumers and life style
- Innovation
References

1. AIPH, International Statistics Flowers and Plants
5. DEFRA, Agriculture in UK
6. DEFRA, Basic Horticulture Statistics in UK
7. DEFRA, Vegetables and Flowers in UK

Springfield Shopping center  http://www.springfieldssshopping.com/
Springfield gardens, Spalding  http://www.springfieldsgardens.co.uk/
Springfield Horticultural society  http://www.springfields.mistral.co.uk/
Spalding Flower Parade  http://www.spalding-flower-parade.org.uk/home
Basic Horticultural Statistics  http://data.gov.uk/dataset/basic_horticultural_statistics-0
Department for Environment Food and Rural Affairs  http://www.defra.gov.uk/
Lingarden Bulbs Ltd  http://www.lingardenbulbs.co.uk/
Thank you for your attention

At Spalding, April 26, 2011