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EXPORT GROWTH AND PROSPECT OF FLORICULTURE IN INDIA: GLOBAL SCENARIO**R.SENTHILKUMAR****ASST. PROFESSOR****PG. & RESEARCH DEPARTMENT OF COMMERCE AND MANAGEMENT STUDIES****SUDHARSAN COLLEGE OF ARTS & SCIENCE****PERUMANADU POST****ABSTRACT**

Floriculture is an age-old farming activity in India. It always has an immense potential for generating gainful self-employment especially among small and marginal farmers. In the recent years it has emerged as a profitable agri-business in India and elsewhere throughout the world. It has also improved the standards of living. Growing consciousness among the citizens across the globe to live in environment friendly atmosphere has led to an increase in the demand of floriculture products in the developed as well as in the developing countries worldwide. Naturally, the production and trade in floriculture has increased consistently over the last 10 years. In this article, we first make a review of the global scenario of floriculture and compare the export growth of Indian floriculture with other countries across the globe considering data for the period 2006-2015. Finally we try to identify some emerging markets of floriculture and make a review of India's export performance in these markets during the period of five years from 2011 to 2015. The data used for the purpose of making comparisons and study of export performance has been collected from the website of the United Nations Commodity Trade Statistics Database.

KEYWORDS

Floriculture Product, Export, Import, CAGR, Global Scenario.

INTRODUCTION

Floricultural products consist of a wide variety of different types of plants & plant materials. They are broadly classified into four categories, namely, (i) bulbs, tubers, corns including, chicory plant (non-food) (HS Code: 0601), (ii) Other live plants, roots, cuttings, mushroom spawn (HS Code: 0602), (iii) Cut flowers, dried flowers for bouquets, etc., (HS Code: 0603) & (iv) foliage etc., except flowers for Ornamental Purposes (HS Code: 0604).

During the ten year period of 2006-2015, production and export of floricultural products from India has increased manifold. In 2006, India's export of this commodity was around 18 million US \$ which has increased to almost four times in 2015. In a country like India floriculture as an Industry has tremendous potential for generation of gainful employment in rural as well as urban areas. Since the global demand of floricultural products is increasing day by day, India can effectively capitalize on this opportunity to solve the problem of unemployment & poverty, to some extent, through achieving a consistent growth in production and export of this commodity which will earn valuable foreign exchange. In comparison to the developed countries and also to some developing countries floriculture in India is still in a nascent stage.

OBJECTIVES OF THE STUDY

The main theme of the paper that know the growth and prospect of export of floriculture in India after the globalization. Globally, the export of floricultural products has increased phenomenally from 8 billion US \$ in 2006 to 13 billion US \$ in 2015. The number of countries reported to have exported floricultural products in 2006 was a mere 50 which has increased to 118 in the year 2015. In fact, this number gradually increased from 50 in 2006 to its peak at 137 in 2012 & 2013. However, the contribution of export of floriculture products to the global export has hovered in the same level during 2006-2015. In fact, it was the highest (0.19%) in 2006 and thereafter, it has mostly remained in the range of 0.14% to 0.16%.

The Netherlands has traditionally dominated the world export market of floriculture products with its value of export growing from 4.6 billion US \$ in 2006 to 6.7 billion US \$ in 2015. It alone contributes more than 50% of the total export of floricultural products worldwide. But its contribution to the global export has come down marginally from 57% in 2006 to 52% in the year 2015. This may be due to the fact that several other countries like Ecuador, Costa-Rica, India, China, Uganda, Austria & Kenya are keenly/ competing in the market of floriculture export after the opening up of the worldwide market in the WTO. Regime.

Columbia, the next highest floriculture product exporting country though has remained in the second position throughout the period 2006-2015, in terms of value of export of floricultural products it is far away from the Netherlands. Italy is the third largest exporter of floriculture products worldwide. During the year 2015, it has exported floriculture products to the tune of \$ 696.90 million. Apart from these three countries, Belgium, Denmark, Germany, Ecuador, USA & Costa-Rica has made significant contribution in the global export of floricultural products during the period under reference.

INDIA'S CONTRIBUTION TO GLOBAL EXPORT

India is in the 18th position, just behind china in the export of floricultural products of the world. But about 0.07% of the country's total export volume during the period 2006-2015. The compound annual growth rate (CAGR) of India's floricultural product export during 2006-2015 is 14% which is far ahead than that of the CAGR in global export of floriculture products (5%). The CAGR of export of floricultural products for some selected countries is presented in the following Table 1:

TABLE 1: CAGR OF EXPORT OF FLORICULTURAL PRODUCTS FOR SOME SELECTED COUNTRIES

Sl. No.	Country	Period	CAGR (in %)	Rank in CAGR (in %)
1	Belgium	2009-2015	7.23	VII
2	China	2006-2015	9.91	V
3	Costa-Rica	2007-2015	4.23	X
4	Colombia	2006-2015	5.85	VIII
5	Denmark	2009-2015	1.09	XII
6	Ecuador	2008-2015	9.55	VI
7	India	2006-2015	14.36	III
8	Italy	2006-2015	4.32	IX
9	Kenya	2007-2015	16.00	II
10	Netherlands	2006-2015	3.82	XI
11	South Africa	2010-2015	10.54	IV
12	Uganda	2006-2015	28.13	I
13	World	2006-2015	5.00	-

E-Source: Secondary Data Collected from United Nations Commodity Trade Statistics Database, Statistics Division, <http://comtrade.un.org/>

The growth in India's floriculture export in 2006-2015 has been quite noticeable in comparison to several other developed nations like the Netherlands, Denmark, Italy, Belgium etc., During the period under reference, Uganda registered the highest CAGR in floriculture product export and India was the third country to register a CAGR more than 10.0. Such a consistent and robust increase in the export growth is quite encouraging.

In the year 2015, around 46% of the total value of floriculture product export from India has been cut flowers, dried flowers for bouquets etc., (ITCS Code: 0603) and another 43% was in the category of foliage, branches & other parts of plants without flowers or flower buds etc., (0604). In fact, export of cut flowers,

dried flowers for bouquets etc., was the highest (83%) in the year 2007 and then it gradually come down to 46% of the total value of export of floriculture produce in the year 2015. On the other hand, export of foliage etc., has consistently increased from a mere 4% in 2006 to around 43% of the total floriculture product export in the year 2015. However, export of live plants, roots, cuttings, mushrooms, spawn etc., (ITCHS Code: 0602) during 2006-2015 has remained more or less in the same level and the contribution of bulbs, tubers, corns etc., (ITCHS Code: 0601) has been 1 to 2% of the total volume of export during this period.

(i) MAJOR EXPORT DESTINATIONS OF INDIA'S FLORICULTURE PRODUCTS

From this sub-section onwards we will restrict our discussion to the period 2011-2015, i.e the second half of the reference period 2006-2015. During the five year period 2011-2015, USA has been the major importer of Indian floriculture products. In 2015, it has imported around one fourth of India's total floriculture export. Next to USA is Japan. In 2011 Japan Imported floricultural product worth of 2.7 million US \$ which has increased almost 5 times to 12.8 million US \$ in the year 2015. The third major export destination for India's floriculture product is the UK and export to this country in 2015 has risen to 7.0 million US \$ from million US \$ from 2.3 million US \$ in the year 2006. Apart from these three destinations, the Netherlands, Germany, Italy, UAE and France also import a significant amount of our floriculture produce.

It is also heartening to note that Indian exporters have also been able to increase their share of floricultural product exports to some emerging markets like Russia, China, Thailand, South Africa and Austria. In case of China and Russia the growth has been quite substantial. Floriculture products of worth three thousand million US \$ was exported to China in 2011 which has grown to more than one million US \$ in 2015 while for Russia it has increased to 0.3 million US \$ in 2015 from almost nil in 2011. On the other hand, export of this commodity to countries like France, Singapore, Belgium, and Spain has either remained in the same level or registered a negative growth in 2011-2015.

(ii) GLOBAL IMPORTERS OF FLORICULTURAL PRODUCTS AND IDENTIFICATION OF POTENTIAL MARKETS FOR INDIA

Germany is the highest importer of floriculture products. The share of Germany in global Import has increased from 1.7 billion US \$ in 2011 to 2.5 billion 2015. It is followed by the USA with an import value of 1.6 billion US \$ in 2015. Its share in global import of flower & flower products has come down to 12% in 2005 from 15% in 2011. UK is the third largest importer of floriculture products from across the globe and its import has more or less remained the same during the period 2011-2015.

In the recent years import of floricultural products from countries all over the world has been quite impressive for the Russian Federation, Poland, Norway, Czech Republic, Hungary, China, Ukraine, Romania, Thailand and South Africa. The CAGR of import of flower during 2011-2015 has been phenomenal for the countries mentioned below:

TABLE 2: CAGR OF FLORICULTURE PRODUCT IMPORT DURING 2011-2015 FOR SELECTED COUNTRIES

Sl.No.	Countries	CAGR	Rank in CAGR
1	China	25.41	V
2	Czech Rep	16.51	VIII
3	Hungary	23.80	VI
4	Norway	11.82	X
5	Poland	18.60	VII
6	Romania	37.20	II
7	Russian Federation	26.89	IV
8	South Africa	13.21	IX
9	Thailand	39.81	I
10	Ukraine	34.90	III
11	World	8.78	-

E-Source: Secondary Data Collected from United Nations Commodity Trade Statistics Database, Statistics Division, <http://comtrade.un.org/>

From the above table it is observed that while the global CAGR for import of flower from the countries all over the world has been 8.78%, it has been higher for countries like Thailand, Romania, Ukraine, Russian Federation and China. In fact, the CAGR for import of flowers from across the world for the countries mentioned above has exceeded that of the developed countries like USA, UK, Germany, the Netherlands, Italy and Japan by a significant margin. The following figure 7 shows the trend in import of floriculture products for some selected emerging flower importing countries.

TABLE 3: DOUBLE RELATIVE MEASURE OF TRADE INTENSITY INDEX FOR SOME SELECTED COUNTRIES

Sl.No.	Country	2011	2012	2013	2014	2015
1	Austria	0.06	0.10	0.26	0.82	0.52
2	Canada	0.25	0.28	0.43	0.49	0.19
3	China	0.56	0.94	0.69	4.69	2.90
4	Czech Rep.	0.03	0.31	0.30	0.25	0.15
5	Denmark	0.16	0.15	0.19	0.22	0.15
6	France	0.44	0.41	0.34	0.25	0.21
7	Germany	0.50	0.46	0.50	0.57	0.42
8	Hungary	0.59	0.64	1.03	0.16	0.27
9	Italy	1.06	0.69	1.18	0.87	0.63
10	Israel	2.72	4.47	7.73	3.27	2.78
11	Japan	2.31	3.22	2.88	2.08	5.30
12	Malaysia	7.55	7.43	9.47	7.80	10.23
13	Mauritius	7.68	10.24	6.63	14.41	9.20
14	Netherlands	1.93	1.51	1.18	1.47	1.02
15	New Zealand	11.45	11.44	15.46	12.93	11.08
16	Philippines	6.80	0.89	4.13	7.34	1.94
17	Poland	0.69	1.68	3.08	1.47	0.96
18	Romania	0.00	0.05	0.06	0.87	0.35
19	Russian Federation	0.00	0.05	0.39	0.41	0.23
20	Saudi Arabia	5.34	5.28	3.36	4.91	4.99
21	Singapore	3.65	3.34	2.76	2.70	1.94
22	Spain	1.78	0.66	0.69	0.76	0.79
23	Sri Lanka	79.87	107.70	93.04	74.78	51.87
24	South Africa	6.68	3.75	3.04	15.44	13.55
25	Switzerland	0.56	0.26	0.19	0.19	0.15
26	Thailand	0.31	1.20	0.88	9.69	4.36
27	USA	1.28	1.97	2.32	1.83	2.03
28	United Kingdom	0.75	0.61	0.90	0.98	0.8

E-Source: Secondary Data Collected from United Nations Commodity Trade Statistics Database, Statistics Division, <http://comtrade.un.org/>

From table 3, it is easy to note that during the period 2011-2015 the countries like the UK, Germany, France, Switzerland, Australia, Austria, Canada, Denmark, Czech Republic & Hungary were less important as markets for India's floriculture products than they were for the world, while countries such as USA, the Netherlands, Italy, Japan, Poland, South Africa, Singapore, Sri Lanka, China etc., appeared to be more important markets to India for export of floriculture products than the rest of the world. A comparison of Table 2 & 3 also reveals that although the growth in import of floriculture products have been phenomenal for countries like the Russian Federation, Romania, Czech Republic & Hungary. Indian exporters were unable to make their presence felt in these markets even though in the other emerging economics of China, Thailand and South Africa, Indian exporters have a significant presence.

We present below in table 4, the trend of import in floriculture vis-à-vis per capita gross domestic product (GDP) (in US \$) for some selected countries during 2011-2015. It may be noted from this table that for almost all the countries mentioned here, the consumption of floricultural products increases as the per capita GDP moves up though the rate of increase in consumption varies widely across the countries. This increase may be due to the fact that with an increase in the GDP the standard of living improves which might have a positive effect towards the consumption of flower products in the developed as well developing nations. What is encouraging to note from table 4 that even in developing countries such as China, Thailand, Malaysia, Mauritius, Philippines, Sri Lanka and South Africa also consumption of flower and products has been growing up with the increase of per capita GDP and these countries are emerging as potential future markets for floricultural products. In table 4, the import figures (in million US \$) for a particular country has been shown in the first row while the second row represents the per capita GDP figures (in US \$).

TABLE 4: TREND IN IMPORT OF FLORICULTURE PRODUCTS (IN MILLION US \$) VIS-À-VIS PER CAPITA GDP (IN US \$) DURING 2011-2015

Sl.No.	Country	Year				
		2011	2012	2013	2014	2015
(1)	(2)	(3)	(4)	(5)	(6)	(7)
1	Austria	230.61	254.43	313.94	303.85	329.47
		29927	30376	30994	32276	33662
2	Canada	225.25	228.44	248.91	276.60	298.45
		28223	29255	30014	31263	32886
3	China	22.14	32.94	45.27	51.38	68.67
		4335	4756	5265	5896	6572
4	Czech Rep.	50.85	64.22	83.45	93.44	109.18
		16429	17211	18064	19448	21317
5	Denmark	181.96	194.59	239.75	257.36	264.91
		29507	30106	30558	31914	33722
6	France	790.47	909.10	1119.17	1254.30	1274.42
		26772	27608	28087	29300	30120
7	Germany	1670.33	1840.45	2008.80	2230.59	2494.77
		26406	26858	27196	28303	29309
8	Hungary	26.65	33.93	50.15	67.50	77.49
		13891	14711	15450	16813	18086
9	Israel	6.74	7.65	8.41	10.00	11.03
		23329	22880	23157	24382	25670
10	Italy	378.15	418.17	454.74	614.28	631.96
		26017	26577	27150	28180	29019
11	Japan	375.76	376.14	408.73	460.94	463.78
		26746	27051	27851	29251	30821
12	Malaysia	3.37	6.59	4.42	5.59	4.30
		8903	9183	9545	10276	10843
13	Mauritius	0.23	0.30	0.47	0.48	0.48
		10234	10667	11052	11794	12456
14	Netherlands	801.05	905.06	1053.08	1135.02	1176.04
		29832	30520	30672	31790	32927
15	New Zealand	5.05	5.39	5.72	6.67	7.53
		20472	21381	22133	23932	22511
16	Philippines	0.86	0.87	0.87	0.91	0.91
		4020	4202	4368	4664	4920
17	Poland	75.69	88.45	101.63	140.94	177.59
		10850	11216	11959	13316	13980
18	Romania	6.11	11.25	11.99	18.22	29.70
		6460	7027	7648	8700	9208
19	Russian Federation	74.92	93.74	112.01	185.53	246.41
		7562	8130	9036	9899	10897
20	Saudi Arabia	9.58	8.55	9.92	13.35	14.80
		12460	12318	13210	13790	14729
21	Singapore	42.83	41.71	41.11	40.18	45.02
		22937	24843	25788	28860	29921
22	Spain	145.52	171.88	222.80	234.48	264.03
		22757	23418	24105	24992	26125
23	Sri Lanka	0.64	0.41	0.48	0.39	0.41
		3591	3735	3939	4390	4569
24	South Africa	4.00	4.49	5.84	6.81	7.44
		9878	10222	10634	11394	12347
25	Switzerland	327.49	365.93	426.29	450.59	450.37
		31835	32821	31747	33039	34355
26	Thailand	1.93	2.88	3.44	3.60	10.31
		6515	6909	7483	8090	8551
27	USA	1342.65	1320.97	1454.32	1607.21	1630.96
		34802	35986	37501	39677	41854
28	United Kingdom	962.66	1268.68	1435.08	1577.38	1603.80
		27515	28257	29265	30821	32005

E-Source: Secondary Data Collected from United Nations Commodity Trade Statistics Database, Statistics Division, <http://comtrade.un.org/>

We now present below the CAGR of floricultural product import vis-à-vis CAGR of India's export of floricultural products to some selected countries during 2011-2015. It is observed from table – 5 that even though the growth in import of floricultural products for countries like Belgium, Spain, France, Hungary, Italy, Switzerland and Oman has been quite substantial during 2011-2015, India's contribution to the import of these countries was unsatisfactory. In fact, India's share to the import of Switzerland, Singapore and Oman has decreased during the period of reference.

TABLE 5: CAGR OF IMPORT VIS-À-VIS THAT OF INDIA'S EXPORT DURING 2011-2015

Sl.No.	Country	CAGR of Import of floricultural products during 2011-'15(in %)	CAGR of Export of floricultural products during 2011-'15(in %)
1	Belgium	9.72	8.61
2	China, Hong Kong SAR	2.35	1.10
3	France	10.02	4.53
4	Hungary	23.80	16.84
5	Italy	10.82	10.28
6	Oman	10.40	-22.07
7	Singapore	1.00	-1.96
8	Spain	12.65	5.40
9	Switzerland	6.58	-9.42

E-Source: Secondary Data Collected from United Nations Commodity Trade Statistics Database, Statistics Division, <http://comtrade.un.org/>

FINDINGS, SUGGESTIONS AND CONCLUSION

India's export performance of floricultural products has been quite noticeable since 2006.

In fact the growth rate of India's flower export during the period 2006-2015 was one of the highest observed world-wide. In spite of such a phenomenal growth in export, it has not been possible for India to record significance presence in the import basket of countries like Germany, the highest importer of floricultural products from across the world and the UK, the third largest importer of flower & related products. In general, it is observed that export of India's floricultural products to Europe during 2011-2015 has not been encouraging although Europe is a major consumer market for floriculture products. This is evident from the fact that during 2011-2015 India's export of cut flowers, dried flowers for bouquets etc., which are in high demand in Europe, has consistently decreased from 71% of total volume of floriculture product export in 2011 to about 46% in 2015. One possible reason for such sluggish performance may be that the Indian exporters are unable to meet the stringent quality norms that most of the European countries demand. Another reason may be the inability of the Indian exporters to produce quality value-added products which are in high demand in most of the European countries.

The world market for floricultural product has been changing continuously. Markets like Germany, the Netherlands, France, New Zealand, Singapore & USA are already saturated while UK, Italy, Poland, China, South Africa, Russian Federation and Thailand are coming up as new markets. Initiatives are to be taken up by the Government as well as the exporters to trap the potential of these emerging markets.

In India, labour is cheap and available in abundance in rural as well as urban areas. The cost of vial inputs for floriculture like water, electricity, fertilizer, pesticides etc., are reasonable. India has a wide variety of tropical and temperature plants in comparison to much other floriculture product exporting countries. But, in spite of these advantages India's performance in the global floriculture market is not up to the mark comparison to several other countries. The major reasons behind such lackluster performance are:

- (i) Absence of proper and adequate infrastructure,
- (ii) Lack of proper technical knowledge of know-how.
- (iii) Inadequate and improper handling of control mechanism,
- (iv) Lack of sale and export promotion activities, market surveys etc.,

Indian floriculture has been mostly small scale and unorganized in nature. In different parts of the country, mainly, small and marginal farmers are engaged in cultivation and production of floricultural products. These small and marginal farmers have little knowledge about the technical aspects and cost-effective methods of floriculture farming. Recently some serious private concerns have started production and export of floriculture products in large scale and in an organized way. But, more of such initiatives both from the Government as well from private entrepreneurs are required. In order to survive in the highly competitive overseas market and to increase market share their production floriculture product, value-added products as also export of such things needs careful and close Integration at all levels-beginning with farmers and ending with Government policy makers. For boosting its floriculture export and to capture more share in overseas market a host of measures are to be undertaken by both the Government as well as the private agencies involved in production and export of floricultural products. Some of the issues that need immediate attention are:

- (i) Setting up of an export promotion council for export of floricultural products,
- (ii) Increase in production value added products like dry flowers, seeds, potted plants, micro propagated plants etc.,
- (iii) Organization of appropriate training for personnel involved in production and export of floricultural products,
- (iv) To create awareness among the producers about all effective quality control measures,
- (v) Establishment of appropriate marketing and distribution channels,
- (vi) Setting up more export processing zones for floriculture products etc.,

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