

Kenya is the leading external supplier of cut flowers to Europe, dominating UK supermarket shelves with a range of varieties and bouquets, and setting the standard for imported roses at the Dutch auctions. The export value of flowers increased by 41% in 2004 and growth is continuing in 2005. Although roses require high capital investment, some other flowers can be grown without greenhouses. Small-scale growers have been involved in the business for many years producing these outdoor varieties. Since flowers give high returns per square metre, they can be an important source of income for growers with limited areas of land. KFC and FPEAK expressed their interest in smallholder flower production at an HDC workshop in May, and since then there has been much interest from buyers and growers to improve and develop the small-scale production of "summer flowers" and other varieties suitable for smallholders. It seems that there is definitely a future in flowers for progressive growers - large and small-scale. *Steve New, Director, HDC*

International Prices

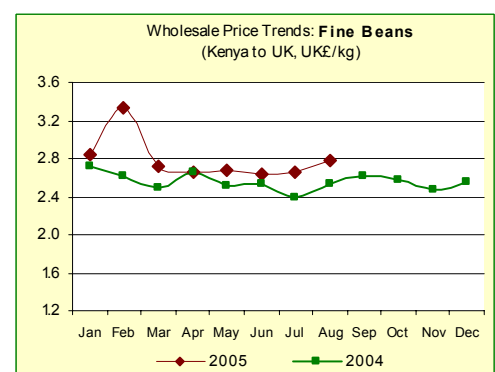
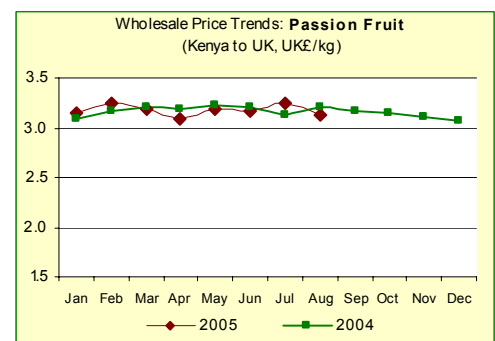
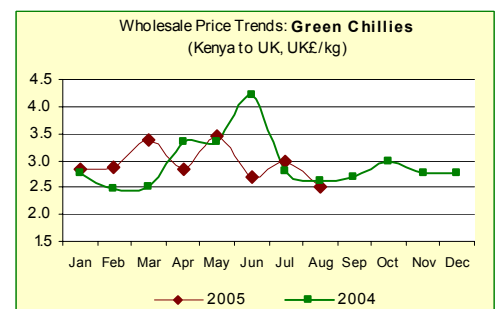
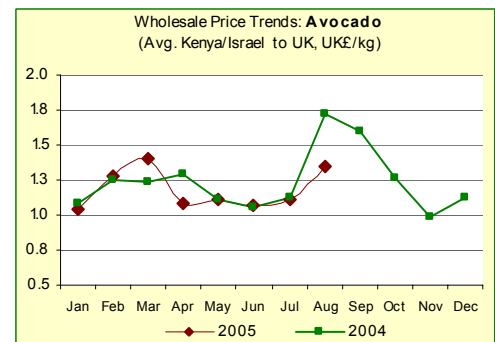
Fresh Fruits and Vegetables – UK Market

Food Surveys UK & Fresh Produce Journal UK					
Market	Supplier	Variety	July	Aug	% Change
Average Wholesale Prices UK£/Kg					
Avocado					
UK	Kenya	Fuerte	1.10	1.35	23%
	<i>Israel</i>	Fuerte	1.12	1.50	34%
	SA	Fuerte	1.11	1.41	27%
Green Chillies					
UK	Kenya	green	3.00	2.53	-16%
	<i>Gambia</i>	green	2.00	2.00	0%
	<i>Holland</i>	green	2.01	2.01	0%
Fine Beans					
UK	Kenya		2.66	2.78	5%
	Zimbabwe		2.70		
Mangetout					
UK	Kenya		2.94	2.93	0%
	Guatemala		3.19	3.00	-6%
Sugarsnap Peas					
UK	Kenya		3.10	3.06	-1%
	Guatemala		3.21	3.12	-3%
Okra					
UK	Kenya		2.70	2.88	7%
	<i>Gambia</i>		3.25	3.50	8%
	Brazil		2.00	2.20	10%
	Thai		2.40	2.50	4%
Passion Fruit					
UK	Kenya		3.25	3.12	-4%
	<i>Colombia</i>		2.33	3.09	33%
	<i>Israel</i>			3.25	
	Zimbabwe		3.08	3.00	-3%
Karella					
UK	Kenya		2.90	3.00	3%

Prices for August generally held up and fine beans were in demand, continuing the trend of slightly higher prices compared to 2004. Chilli was the exception with plenty of Dutch and even English greenhouse production on the market.

Limited supplies of avocado and strong demand for summer salads pushed the price up to £1.35/kg. Strong promotion by the South African Avocado Growers Association has also helped. *Hass* is the variety generally preferred by UK supermarkets because it is firmer and does not bruise as easily as green-skinned varieties when it is handled by consumers looking for a ripe fruit. On the other hand, supermarkets are also looking for flavour and according to one major importer reported in the Fresh Produce Journal " ...a good *Fuerte* beats a good *Hass* every time. We do informal blind tastings and mostly get the same result". This could be good news for Kenya where *Fuerte* is the main variety.

Passion fruit from Kenya was widely available in the wholesale markets at £3/kg but absent from supermarkets where Zimbabwean and South American fruit was being sold at up to £14/kg. Kenyan exporters are reluctant or unable to supply supermarkets following several MRL interceptions earlier in 2005.



Smallholder flowers

Varieties	Volume (MTs)					
	2000	2001	2002	2003	2004	2005
Eryngium	479.0	330.0	488.0	*387.0	393.4	260.4
Ornithogalum	203.0	114.0	123.0	290.0	252.8	237.5
Arabicum	421.0	141.0	213.0	208.0	193.4	187.5
Papyrus	131.0	95.0	170.0	155.0	82.2	105.5
Agapanthus	40.0	25.0	42.0	67.0	92.6	120.4
Asclepias (Moby Dick)			5.0	47.0	86.9	91.4
TOTAL	1,274.0	705.0	1,041.0	767.0	1,101.3	1,002.7

Although more than 30 varieties of flowers and foliage grown by smallholders are currently exported, five products currently account for about 50% of the total – *Eryngium planum*, *Ornithogalum thyrsoides*, *Ornithogalum arabicum*, *Cyperus papyrus*, *Agapanthus* and *Asclepias*

Eryngium planum (*Eryngium*) exports remained steady in 2004 but dropped by 30% during the first six months of 2005. To regain and increase market share, it is essential that growers obtain seed of varieties such as “blue angel” which have large, symmetrical, blue heads. Disputes regarding breeders rights need to be resolved. Since the market preference is for a uniform blue flower, it may be best to concentrate production in high altitude areas such as Timau and Kinangop where colour develops naturally.

Ornithogalum thyrsoides (*Ornis* or *Ornithogalum*) exports have dropped 10-15% over the past 18 months. To regain market share, old-fashioned varieties must be replaced by new types such as “Mount Fuji” which have longer flower heads.

Varieties	Value (KShs millions)					
	2000	2001	2002	2003	2004	2005
Eryngium	30.0	28.0	30.7	78.6	65.1	52.9
Ornithogalum	22.7	16.1	20.3	56.1	35.8	33.5
Arabicum	23.7	21.2	48.3	50.0	36.7	41.8
Papyrus	24.5	9.3	22.5	29.8	11.9	14.4
Agapanthus	4.0	3.4	5.2	14.4	12.4	30.7
Asclepias (Moby Dick)		0.0	0.5	7.8	6.2	8.8
TOTAL	104.9	78.0	127.5	236.7	168.1	182.1

Ornithogalum arabicum (*Arabicum*) is still very popular with small-scale growers, but exports have dropped 5-10% over the past year, and they are often left with unsold flowers. The main problems are short stems and small flowers, caused by self-propagation and consequent degeneration of bulbs. New planting material and alternative varieties are needed.

Cyperus papyrus (*Papyrus*) is currently picked from the wild and supplied on demand. Exports dropped by 40% in 2004 and have only picked up slightly this year. *Papyrus* has a limited market but with more attention to uniformity and quality it should be possible to increase sales.

Agapanthus (*Agapanthus*) is one of the few flowers grown by smallholders which has shown export growth this year. Quantities have almost doubled relative to 2003, with an average of more than two tones per week being shipped in 2005. Improved varieties such as *A. Intermedia* need to be introduced to maintain this growth.

Asclepias (*Moby Dick*) gained much popularity with smallholders in 2003/04 but production soon exceeded demand and many flowers were unsold. Exports increased slightly to 45 tonnes during the first six months of 2005. The current market demand is small but could grow if flower quality is improved. Buyers want five uniform green “flower balls” spread evenly along the stem.

Since the HDC smallholder flower workshop held in May, we have received many enquiries from growers and much information from buyers on the potential for different types of “outdoor” flower. Buyers have suggested many varieties for development including: *Trachelium*, *Echinops*, *Delphinium*, *Astrantia*, *Allium* species and decorative grasses.

Varieties	Average Price per stem (Euro Cents)			
	2002	2003	2004	2005/ Wk 33
Eryngium	0.260	0.212	0.154	0.180
Ornithogalum	0.156	0.170	0.085	0.110
Arabicum	0.190	0.200	0.168	0.180
Papyrus	0.145	0.112	0.120	0.130
Agapanthus	0.346	0.326	0.136	0.142
Asclepias (Moby Dick)	0.255	0.212	0.230	0.167
Total	1.352	1.232	0.893	0.909

