

Horticulture in Denmark

”Mission impossible or possible”

by Torben Lippert
Manager

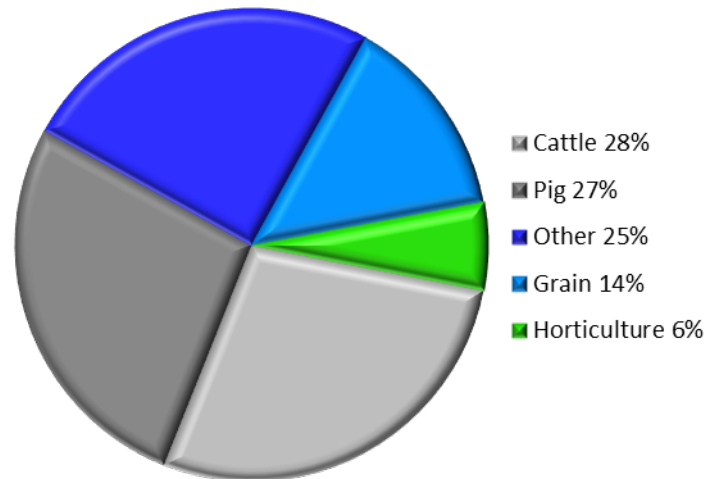
Association of horticultural producers in Denmark



Danish Horticulture by Torben Lippert

- Horticulture in Denmark
- Production economy and market
- Food safety

- We are 6% of the agricultural sector in Denmark



- But close to 25% of the sales turnover in plant products

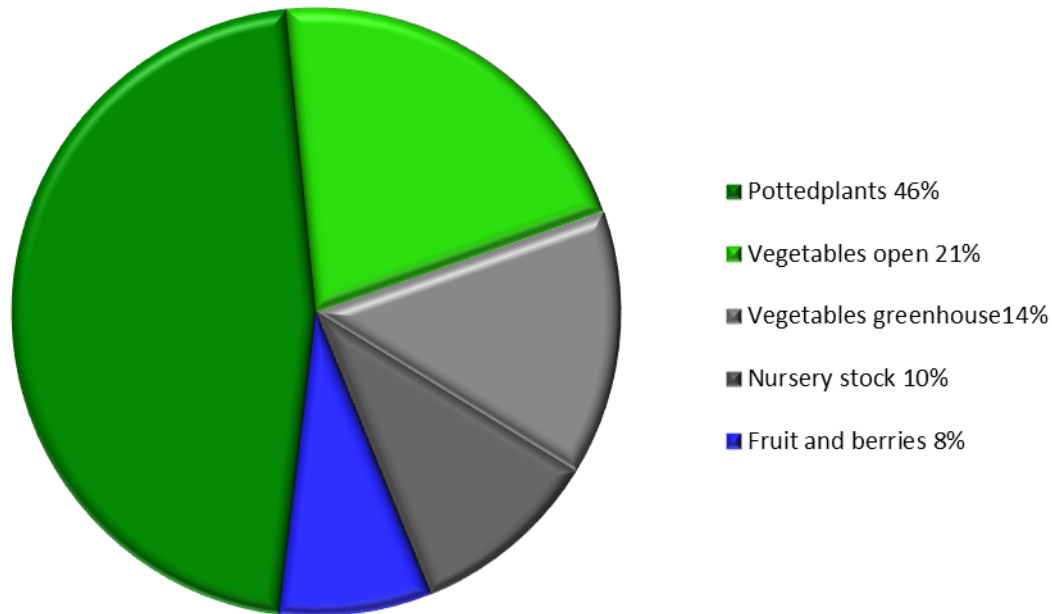
- Production value: 550 million €
- Export: 320 million €
- Employment: 12.000 persons
- direct and indirect





Ornamental incl. nursery stock 56 %
Covered production 60 % (increasing)

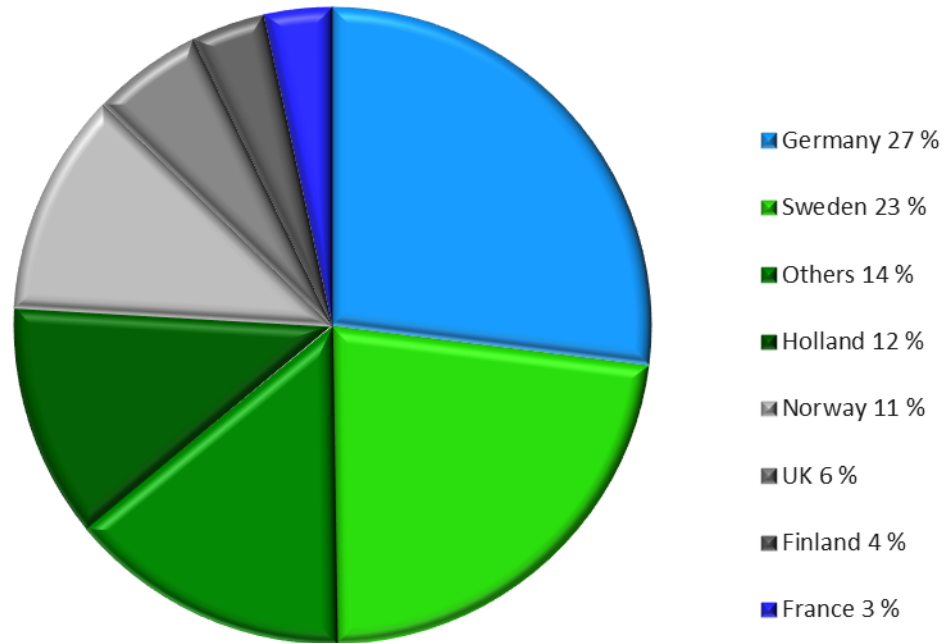
All in production value



- Ornamental sector 56 %:
- Greenhouse ornamentals 46 %
 - Small flowering potted plants
 - Many new varieties
 - 80 % export
 - Cut flowers close to 0 (+Tulips)
 - **Some decrease in production**
- Nursery plants 10 %
 - Primary to the home market
 - Some export to Norway and Sweden
 - **A slight decrease in production - and increase in import**



Germany and Sweden 50 %



- **Fruit and vegetables = 44 %:**
- In general for the home market but export is increasing
- **Field vegetables 21 %**
 - Increasing production
 - Increasing in organic production and demand
- **Greenhouse vegetables 14 %**
 - Increasing production - herbs
 - Increasing in organic production and demand
- **Fruits and berries 8 %**
 - Decrease in berry production – juice industry/Poland
 - Demand for organic produce



- The production cost are generally high in Denmark
 - Labour cost are very high and energy cost relatively high
- Not able to compete on the price
- For many edible products, production has decreased



Products with high degree of import:

- Tomatoes
- Cucumber
- Cauliflower
- Broccoli
- Apples



Many products ends up on a national self-sufficiency at 30 %

- **We have a high level of self-sufficiency in:**

- Root vegetables
- Lech
- Lettuce
- Cabbage
- Onions



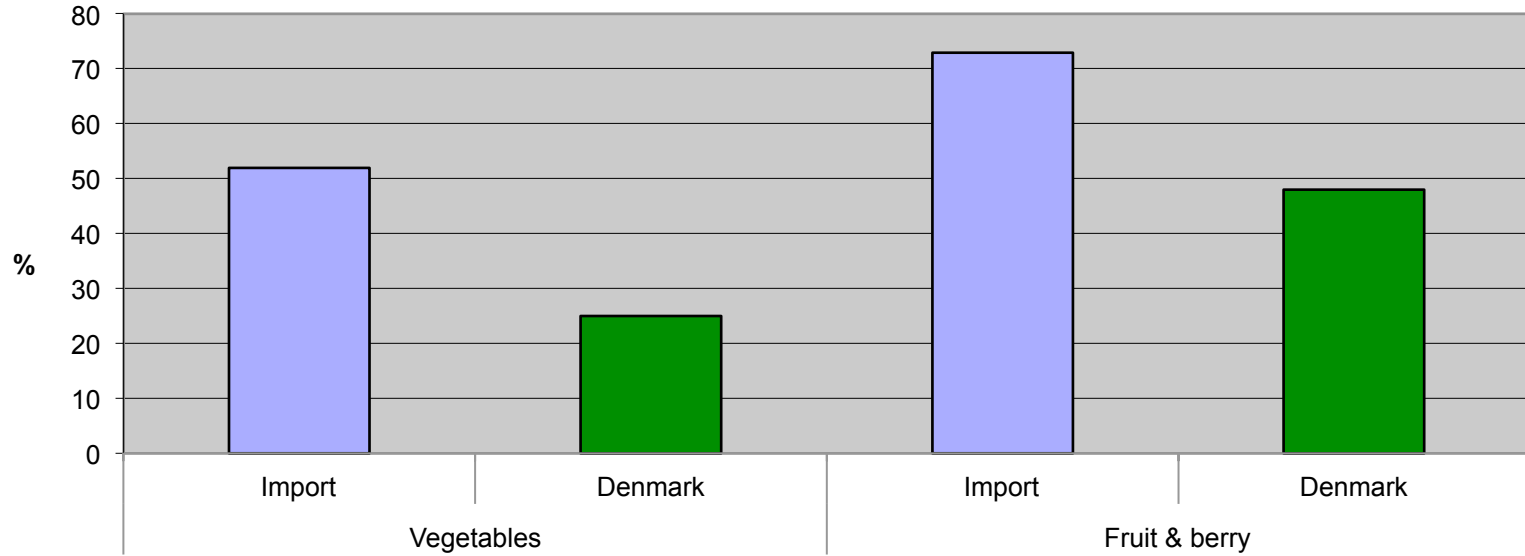
Strong points in the F&V sector in Denmark

- The climate is cold/warm, lots of light and rain
 - but seasonally
- Clean water for irrigation
 - in Denmark we use underground water
- Very restricted use of pesticides
 - IPM technics are well implemented
- Relatively high degree of organic production, and still increasing
- **High level of produce safety**





Pesticide residue, detection in %, 2014





- Trends consumers:

- Nordic food = Local food
- Dietary habit changes – focus on vegetables
- Food safety is an issue
- Quality food may cost
- Organic food may cost
- Quality/organic vegetables can be exported



- The retail trade are aware of this



- Strong regulation and regulatory public control
- Self-checking (risk based analyses)
- Global GAP widespread
- Advisory service help the producers
- Quality control systems at sales organisations
- Traceability and recall procedures
- Limited pollutions and incidents

- Producers, retailers, restaurants, consumers and media are very aware of food safety





- EU encourage producers to sell their products via sales-organisations(PO) – via support up to 4,6 % of turnover
 - 60 % of the production in Denmark is in a PO
- It strengthening the producers power in the sale
- It helps produce safety!





- EU plant health regulation
- Strong public control in the nurseries
- 0 pests, if found no sale
- EU plant pass port
- Export certificate – Norway – Russia – US
- EU import plants & cuttings regulated



- High wages and lack of labor
- force in the sector
- High costs
- High energy costs
- Old production facilities/ high average age
- Lack of capital investment
- **Cheap import**
- **Hard competition on the export market**



- High productivity
- Mechanization & new technologies- robots
- Part of the energy solution
- Food quality – broad sense - organic
- Local production
- Innovation

- **We can win the battle it's possible**

Thank you for your attention

