

FLOWERS

花卉



Overview

Floriculture (including the production of cut flowers, potted flowers, garden ornamental plants, edible processed flowers) is an uprising industry in Yunnan, linking flower production with life improving and ecology conservation. As the most representative industry of modern plateau agriculture, cut flower continues to rank the first in China in terms of its scale and production for 24 years in a row. Going forward, Yunnan will strive to upgrade the floral industry and make it more influential in the world market. Yunnan aims to become the world-class floricultural innovation and trading center that will be the largest in Asia, one of the most important high-quality flower production bases, and a major floral tourism destination.

综述

花卉（鲜切花、盆花、园林观赏植物、食用加工花卉）是具有生产、生活、生态三重属性的农业朝阳产业。作为高原特色现代农业中最具代表性的产业，云南鲜切花种植规模和产量已连续 24 年居全国第一。

云南花卉亟待实现新跨越，在世界花卉舞台上发挥更为重要的作用，2022 年，云南将会建设成为世界一流、亚洲第一的花卉创新中心和交易中心，全球重要的高品质花卉生产基地，及全国主要花卉旅游目的地。

Development Status

1. Yunnan has the largest flower cultivation area in China. Since the 12th Five-year Plan, the sale of flower cultivation in Yunnan has recorded an annual increase of 14.04%, which is 7.58% higher than that of the country's average. Output of the industry is 5.75% above the national average level. In 2017, the total cultivation area reached 1,562,000 mu. The output stood at 50.32 billion yuan, accounting for 33.37% of the country's total.

2. Floral industry in Yunnan registered the fastest growth in the world.

Thanks to the large demand from the domestic market, Yunnan has seen the fastest growth in its floral industry compared with other countries in the world. Currently, the flower cultivation area and output in Yunnan ranks the third in the world, next to the US and India. The total output is slightly below that of the US and Netherlands, but is higher than many other countries such as Japan

and Ecuador. The cultivation area of cut flowers tops the world, with export volume ranking the second in the world.

3. The flower-trading market in Yunnan ranks the first in Asia and the second in the world.

In 2017, 7.9 billion RMB worth of cut flowers were sold in Dounan Flower Market. The total trade volume stood at 6.55 billion yuan. The scale of flower trade in Yunnan is close to that of the Royal Flora Holland (the company sold 12 billion potted flowers and cut flowers, with trade volume reaching 4.7 billion euros, which is equivalent to RMB 36.66 billion yuan). Yunnan has gained a dominant place and a right to administer the benchmark in both domestic and Asian flower markets.

Industry Mix

N1. The composition of flower cultivation area
The floral industry in Yunnan includes the cultivation of cut flowers, potted flowers, flowers for processing and



ornamental plants. The cultivation scale of cut flowers, potted flowers and flowers for processing is particularly large. The proportion of cut flowers and potted flowers is 9.22% and 37.19% higher, respectively, than the rest of the world. In terms of cut flowers, the cultivation area of roses, carnation and lily accounts for 72.37% of the total in Yunnan and 35.35% in the world's total.

2. Market Structure

The floral industry in Yunnan is export-oriented. In terms of flower sales, 81.3% of the cut flowers produced in Yunnan has been sold to other provinces, and 8.4% has been exported to other countries. There are also a variety of transaction modes: 49% of flowers are traded through wholesale, 23% through e-commerce, 17% through direct sales and 11% through auction. Of all modes of trading, e-commerce is thriving. By 2017, 21 online trading companies have been registered (6 have either completed the financing process or have become a listed company). It is estimated that in 2019, the sales volume through e-commerce is going to exceed RMB 60 billion yuan.

Top 10 Flower Products in Yunnan (2018)

No. 1: "Jinyuan" rose cut flowers by Yunnan Jinyuan Flower Industry Co., Ltd.

No. 2: "Honghua Horticulture" chrysanthemum seedlings by Kunming Hongzhijia Horticulture Co., Ltd.

No. 3: "Yunxiu" Chinese rose cut flowers by Yunnan Yunxiu Flower Co., Ltd.

No. 4: "Jinhai" Chinese rose seedling by Jinhai Agricultural Science and Technology Development Co., Ltd.

No. 5: "Caring Flower" pleioptalous rose by Yunnan Jiuxiang Flowers Biotechnology Co., Ltd.

No. 6: "Yang Yueji" hydrangeas cut flowers by Kunming Yang Yueji Horticulture Co., Ltd.

No. 7: "Yinmore" carnation seedling by Yunnan Yinmore Flower Industry Co., Ltd.

No. 8: "Qianyun" camellia by Yunnan Xinlu Camellia Co., Ltd.

No. 9: "Fengdao" chrysanthemum cut flowers by Yunnan Fengdao Flower Co., Ltd.

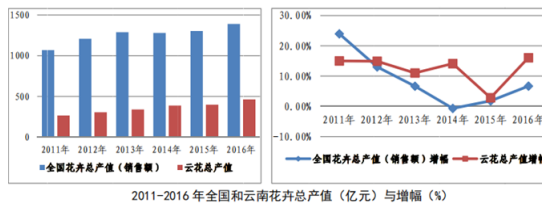
No. 10: "Dream Grass" preserved flowers (*Gypsophila paniculata*) by Yunnan Lilu Environmental Construction Co., Ltd.



Dounan Flower Wholesale Market



Dounan Fresh Flower Purchasing Market (Yunnan)



2. 云南是全球花卉产业增长最快的地区

得益于我国强大的市场需求，我省的花卉面积和产值增长速度全球第一，目前云南花卉全球面积和产值第三，在美国、印度之后；总产值仅低于美国和荷兰，高于日本、厄瓜多尔等国家。其中鲜切花种植面积全球第一，外销额全球第二。

发展现状

1. 云南是我国最大鲜花生产区，“十二五”以来云南省花卉种植规模年均增长 14.04%，高于全国平均增幅的 7.58%，产值增幅高于全国 5.75%，2017 年种植面积 156.2 万亩，总产值 503.2 亿元，占全国花卉总产值的 33.37%。

各国花卉面积与产值比较

国别	面积 (万亩)	较上年增长 (%)	产值 (亿元)	较上年增长 (%)	亩产值 (万元)
印度	364.5	-2			
美国	293.2		608.6		2.1
荷兰	67.3	-0.9	549.1	1.4	7.4
中国云南	156.2	17.9	503	13.3	2.3
日本	40.2	-2.2	265.6	-13.9	6.6
哥伦比亚	10.2	-4.7	88.2	0.6	8.6
厄瓜多尔	12.7	-9.3	53	-1.9	4.2
肯尼亚	6.1	0	44.8	-7.2	7.3

2017年各国鲜切花种植面积与外销额（出口额）比较

国别	面积(万亩)	出口/外销额(亿元)
荷兰	2.8	237.7(含进口再转出口部分)
中国云南	20.9	89.6
哥伦比亚	10.2	88.2
厄瓜多尔	12.7	53.3
肯尼亚	6.1	44.8

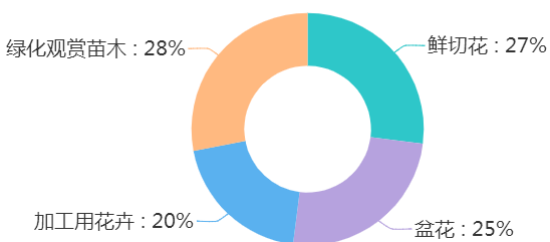
3. 云南有亚洲第一、世界第二大鲜花交易市场 2017年斗南花卉市场交易鲜切花79亿支、交易额65.5亿元，交易规模仅次于荷兰Royal FloraHolland交易集团（该集团2017年盆花和鲜切花交易量为120亿支（盆），交易额47亿欧元，折合人民币366.6亿元），在国内及亚洲鲜切花市场享有市场主导权和定价权。

结构

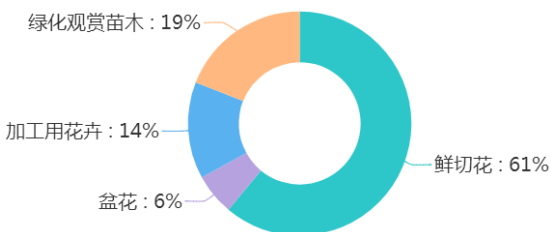
1. 种植结构

云南花卉产业由鲜切花、盆花、加工用花卉、绿化观赏苗木四类组成，前三类规模优势明显，其中鲜切花和盆花比重高出世界的9.22%和37.19%。鲜切花方面玫瑰、康乃馨和百合的面积占全省切花总面积的72.37%，占世界切花总面积的35.35%。

种植面积

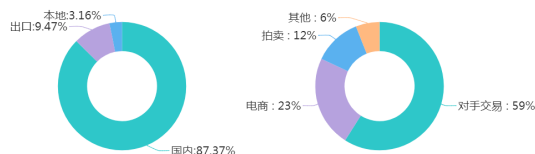


产值



2. 市场结构

云南花卉为外向型产业。鲜切花省外销售占81.3%、出口占8.4%、省内销售2.7%。多种交易方式并存，批发占49%、电商占23%、直销占17%、拍卖占11%。其中，电商发展迅猛，到2017年全国已上线电商21家（6家完成融资或上市），预计2019年电商销售将达600多亿元。



云南省 2018 年“10 大名花”

- 第一名：云南锦苑花卉产业股份有限公司“锦苑”牌玫瑰鲜切花
- 第二名：昆明虹之华园艺有限责任公司“虹華園藝”牌菊花种苗
- 第三名：云南云秀花卉有限责任公司“云秀”牌月季鲜切花
- 第四名：通海锦海农业科技发展有限公司锦海”牌月季种苗
- 第五名：云南玖香鲜花生物科技股份有限公司花知道”牌重瓣玫瑰
- 第六名：昆明杨月季园艺有限责任公司“杨月季”牌绣球鲜切花
- 第七名：云南英茂花卉产业有限责任公司“英茂”牌康乃馨种苗
- 第八名：云南欣绿茶花股份有限公司“芊云”牌茶花
- 第九名：云南丰岛花卉有限责任公司“丰岛”牌菊花鲜切花
- 第十名：云南利鲁环境建设有限责任公司“梦之草”牌保真花（满天星）