Sierteelt na Covid-19: Bloeien of verwelken?

Rabobank's visie op de Sector

Arne Bac, 3 september, 2020

Banking for Food

Rabobank

Agenda

- Algemene ontwikkelingen
- Effecten van Corona
- Economische verwachtingen
- Sierteelt sector in 2021
- Lessons learned
- Rabobank's visie op sierteelt

Situatie voor Corona

Sectoren staan er goed voor

Consolidatie

(teelt, handel, veredeling)

Positie handel dominant

Consument

Beleving, gezondheid etc

Groei:

EU 1-2%, NA 2%, Azie >5%

Keten:
Bloemist/vakhandel (-), retail (+), online (+)

Eerste impact Corona

- Sterk geraakt door:
  - lockdown maatregelen (niet door vraaguitval)
  - Logistieke uitdagingen (kosten luchtvracht en beschikbaarheid),
  - Arbeid beschikbaarheid
- Sierteelt sector geen“vitale sector”…
- Impuls van online
- Goodwill

  #flowerboostchallange #mooiwatbloemendoen

De versoepeling

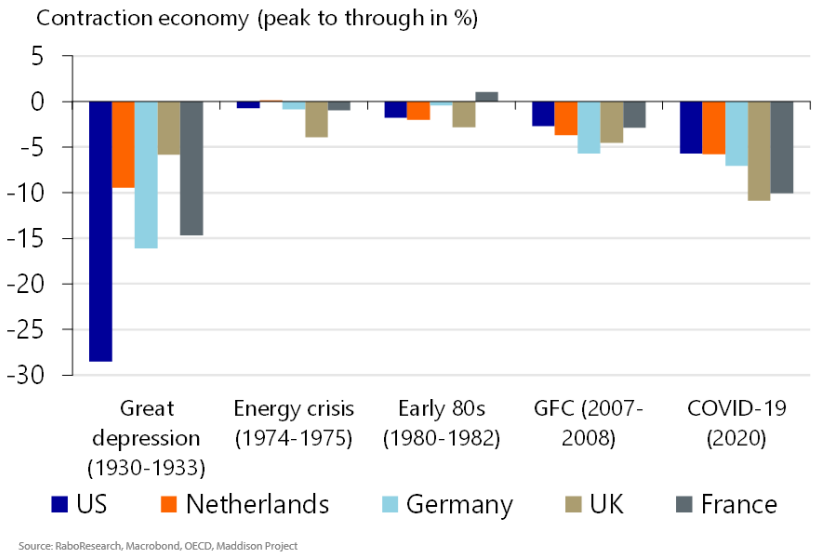
- “Cocooning” => extra verkoop. Dankzij marketing, goodwill etc.
- Evenementenmarkt heeft moeilijk
- Disruptie ketens door productie veranderingen (minder opzetten chrysanten, snoeien van rozen, anthuriums, etc.
- Belangrijke buitenlandse productieregio’s draaien op halve kracht
- Nieuwe verkoopkanalen worden extra benut (online)

Economische verwachtingen juli '21

Economische vooruitzichten

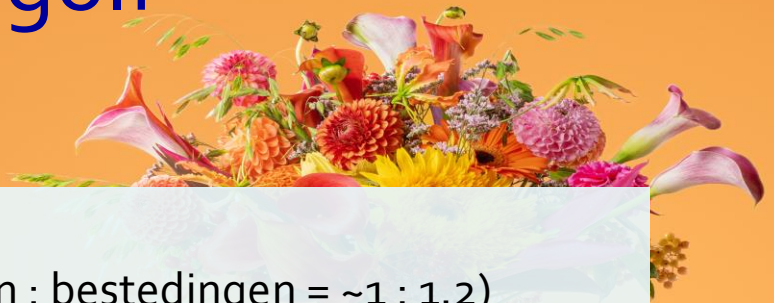
Real y-o-y growth (%)	*'19*	*'20*	*'21*
Gross domestic product			
World	3.0	-4.1	4.3
US	2.3	-5.7	0.7
Eurozone	1.3	-9.1	6.1
- Germany	0.6	-7.0	5.0
- France	1.3	-10.1	7.4
- Italy	0.3	-11.5	7.0
- Spain	2.0	-13.3	8.4
- Netherlands	1.8	-5.7	2.9
United Kingdom	1.4	-10.9	5.0
China	6.1	1.2	4.7
Japan	0.7	-4.8	2.9
Brazil	1.1	-7.3	4.5
India	5.3	-3.8	8.7
Australia	1.8	-6.8	4.5

Grootste economische crisis sinds 1930



Source: RaboResearch, Macrobond, OECD, Maddison Project

De disclaimer: geen 2e golf



- Werkloosheid (correlatie inkomen : bestedingen = ~1 : 1.2)
- Verlaging BNP en lager besteedbaar inkomen => marketing.
- Omzet krimp (-5 tot 7%): => volume (2/3) prijs (1/3)
- Shake out kleine bedrijven Kenia, Equador en Colombia

VUL DE AFSTAND
MET SCHOONHEID
GA NAAR JE BLOEMIST OF TUINCENTRUM

GA VOOR MEER INSPIRATIE NAAR
MOOI WAT BLOEMEN DOEN .NL
MOOI WAT PLANTEN DOEN .NL

Lessons learned

- Belangenbehartiging cruciaal.
  - Greening the cities, thuiswerken: sierteelt relevant
  - Overheidssteun verschilt per land
  - Veerkracht sector groot (concurrentie positie ⇧)
  - Sterke buffers nodig
- Luchttransport => moeilijker marktbereik.
- Arbeid=> robotisering / automatisering
- Sterke bedrijven overleven!

Rabobank’s visie op Sierteelt

- Onze visie is niet verandert
- Bloemen, planten, bomen voor “welzijn”
- Goed ondernemerschap!
- Markt, klant en consument kennen is must
- Lange termijn relaties doen ertoe: afnemer, telers, bank
- Risico management krijgt extra lading (markt, arbeid, logistiek)
- Duurzaamheid is niet voorbij
- Sierteelt sterker op de kaart

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Dank voor jullie aandacht!

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