US Cuts Industry
- An incredible diversity of species are sold as cuts
  - Flowers
  - Foliage
  - Branches
  - Fruits
  - Fresh, dried, preserved

Categories of Cuts
- **Major Greenhouse Cuts**
  - *Rosa*, *Dianthus*, *Dendranthema*

Categories of Cuts
- **Minor Greenhouse Cuts**
  - *Lilium*, *Alstroemeria*, *Antirrhinum*, *Eustoma*, *Gerbera*, orchids, *Tulipa* (33 species total)

Categories of Cuts
- **Field-grown Cuts**
  - *Celosia*, *Consolida*, *Delphinium*, *Gladiolus*, *Helianthus*, *Zinnia* (205 species+tropicals)

Specialty Cut Flowers
- Any species other than *Rosa*, *Dendranthema*, and *Dianthus*
- Minor greenhouse cuts and field-grown cuts
- ‘alternative greenhouse cuts’, ‘field cuts’, ‘summer flowers’

Markets
- Wholesalers and mass market
- Florists and specialty supermarkets
- Direct retail
  - Farmers markets
  - Roadside stands
  - Pick-your-own
US Cuts Industry
- Arrangements
- Mixed bouquets
- Single species bunches, ‘Euro bunches’ etc.

Up to the 1960s
- Wide range of field or greenhouse-grown cuts close to markets
- In the 1950 and 1960s production centralized
  - Florida, California, Colorado began to dominate
  - Field production still common
  - First carnation and chrysanthemum production in Columbia in 1966

1970s to 1990s
- In the 1970s and 1980s, cut flower production dominated by a few species
  - California most important
  - Mainly greenhouse grown
- In the 1990s, imported cuts dominate and specialty cuts reemerge
  - Association of Specialty Cut Flower Growers (ASCFG) organized

Current Trends
- Total market static or slowly increasing
- Per capita cut flower sales peaked in 1996-1999
  - Variable postharvest life
  - Lack of a coherent marketing campaign
  - Growth of other competing gift items
- Farm distribution changing
  - Large farms, few but increasing in size
  - Mid-size firms decreasing in number
  - Small (niche) farms increasing in number

Roses: US Sales
![Graph showing US Sales of Roses](source: Nelson, 2003)

Roses: Price Erosion
![Graph showing Price Erosion of Roses](source: USDA, 2003)
Cut Flowers and Foliage

- Cut flowers and foliage, $521 million

| Other cut flower species               | $132.2 |
| Other foliage species                 | 59.1   |
| Lilium                               | 57.7   |
| Rosa                                 | 56.2   |
| Rumohra                              | 51.8   |
| Tulipa                               | 28.3   |
| Gladiolus                            | 26.7   |
| Gerbera                              | 22.8   |
| Dendranthema                         | 18.5   |
| Anterhifum                           | 16.6   |
| Iris                                 | 16.2   |
| Orchids                              | 10.5   |
| Delphinium/Consolida                 | 9.5    |
| Eustoma                              | 6.4    |
| Alstroemeria                          | 5.1    |
| Dianthus                             | 3.2    |

Source: USDA, 2003

Cut Flowers

- Top flower producing states
  - California, 279 million, 55%
  - Florida, 27 million
  - Hawaii, 18 million
  - Washington, 18 million
  - Oregon, 10 million
  - North Carolina, 3 million, #13
  - Cut Greens

Cut Foliage

- Leatherleaf fern, $51.8 million,
- All other cut foliages, $59.1 million
- Top cut greens producing states
  - Florida, $86 million, #1
  - California, 17 million, #2
  - Oregon, 4 million, #3
  - North Carolina, not enough to rank

Cut Flowers – 2002

| Major Greenhouse Cuts | $78 million |
| Minor Greenhouse Cuts  | 147         |
| Foliage (Shade/Outdoor)| 111         |
| Field Cuts            | 184         |
| Total                 | 521         |

Source: USDA, 2003

Specialty Cuts 1993-2002

Source: USDA, 2003

Source of New Crop Species

- Established species
  - New cultivars
  - Hybrids
  - New uses (or recently new)
- Species new to cultivation
Commercial Cut Characteristics

- Tall (18+ in.)
- Long postharvest life
  - 7 to 10 days
  - Handle storage and shipping
  - Postharvest treatments may be used
- First harvest in 2 years for perennials, preferably first year
- Short crop time
- Productive/reliable
- Few production problems
- Profitable/Fits a niche