

THE GROWTH OF CUT FLOWERS IN INDIA AND ITS TRADE WITH JAPAN, UNITED ARAB EMIRATES, ITALY, CANADA AND AUSTRALIA

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Flowers have always symbolized variety of human feelings and emotions. Flowers are a delicate natural creations having universal acceptance. The flowers form an integral part of Indian society. The Indian floriculture (cultivation of flowers) industry is a combination of traditional and cut (modern) flowers. The modern flowers like Bird of paradise, roses and carnations are grown in controlled conditions in poly-houses. Traditional flowers like chrysanthemum and marigold are grown in open areas with small investments. Cut flowers have a high price and demand in the international market. Globally the floriculture industry has a share of 80 billion but India has a very small share in this trade. However, it is being viewed as a potential high growth industry. Whereas in recent years, the business of cut flowers is increasing in India.

The study aims at understanding India's growth area in the cut flowers and its trade (export-import) with the world. An attempt is made to study the area under cultivation of modern flowers. It includes states Karnataka, Maharashtra, and Delhi. The research paper also studies the export-import of modern flowers with the countries Japan, United Arab Emirates, Italy, Canada and Australia. Only secondary source of data is considered. It is taken from APEDA (Agricultural and Processed food products Export Development Authority). Statistical tools like graphs are used in this research paper for the data interpretation.

Keywords: Floriculture, Cut flowers, export-import, area under cultivation, APEDA.

INTRODUCTION

The production, cultivation and marketing of flowers is done in India. The traditional flowers like jasmine is grown in open areas while the modern flowers like roses are grown under proper and controlled conditions. These areas are provided with regular pest control, proper soil supplements and controlled temperature.

It is found that the production of cut flowers is more than the production of loose flowers.

In 2004-2005 the cut flower production was 1952 million and loose flower production was 655 ('000 Mt).

In India the cut flowers are grown in the following states:

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Table 1
State and Area Under Flower Crops

States	Area (ha)
Karnataka	19161
Tamil nadu	14194
West Bengal	12285
Andhra Pradesh	5933
Maharashtra	3356
Rajasthan	1985
Delhi	1878
Haryana	1540
Madhya Pradesh	1270
Uttar Pradesh	1000

OBJECTIVES OF THE STUDY

- (1) To understand the role of cut flower in the world trade.
- (2) To study the comparative analysis of export-import of cut flowers in India with top 5 floriculture countries in the world.
- (3) To find out the area under cultivation of cut flowers in India.

STATE AND AREA UNDER CULTIVATION OF CUT FLOWER CROPS

Floriculture in Karnataka

According to Debashish Sengupta and Raj Kamal in "floriculture marketing in India", karnataka has the largest area under cultivation of modern cut flower crops. It holds 60-70% of the india's total flower production. It has been over 300 years that Karnataka is in the floriculture.

Table 2
Area and Production of Horticulture Commercial Flower Crops in Karnataka (2003-2004)

Sl. No.	Name of the Crop	Area in hectares	Production in tons	Yield in tons/hectare	Value in lakh rupees
1.	Aster	710	6857	10	526
2.	Crossandra	1624	7669	5	1882
3.	Marigold	4583	49777	11	2222
4.	Jasmine	3451	20244	6	8265
5.	Chrysanthemum	2964	36294	12	3931
6.	(a) Tube roseSingle	925	8122	9	1557
	(b) Double (lakh spikes)	121	996	8265	
7.	Gladiolus (lakh spikes)	135	307	2	360
8.	Rose (lakh flowers)	1530	3628	2	3041
9.	Bird of paradise (lakh flowers)	27	85	3	39
10.	Golden rod (lakh flowers)	27	85	3	39
11.	Calla lily (lakh flowers)	9	14	2	3
For Sl. No. 12 to 14		Area in	Units		
12.	Orhids (lakh spikes)	2002	12	0.01	12
13.	Carnation (lakh cut flower)	38	186	5	1376
14.	Anthurium (lakh cut flower)	40	96	106	15

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The above table gives the details about the total commercial flower crops grown in Karnataka.

The state of Karnataka has an operating company controlled by growers called "Karnataka agro industries corporation". In 2007, it announced the acquisition with Kenya based sher agencies. With this acquisition the company is hoping to achieve a turnover of Rs. 1000 crore by 2010.

Floriculture in Maharashtra

Maharashtra is one of the leading states in flower production. It covers 3356 ha of area under cultivation of cut flower crops. It has an appropriate climate, soil for growing flowers. It is one of the leading states for marketing of the flowers. Mumbai, Pune, nagpur and Nashik are its marketing centres. Agri-export zones are also there in Maharashtra in Pune, Nashik, Kolhapur and Sangli.

In 1993, Maharashtra formed a development society namely "Maharashtra cooperative floriculture development society ltd." In Maharashtra the area under protected floriculture is 12000 ha and 500 ha.

Some of the objectives if the "maharashtra cooperative floriculture development society ltd." are:

- (a) To co-operate and promote marketing and the trading activities of the members of the society.
- (b) To initiate the development of flowers of foreign origin for export in the world market.
- (c) To sell the floricultural products of the individual members.
- (d) To open branches in any part of the maharashtra and outside the state with the permission of the competitive authority.
- (e) To raise funds from NCDCC/NABARD/Nationalized banks/NHB and other government and financial agencies for creating modern structure of poly-house techniques and to promote our products in the foreign markets.
- (f) To create facilities for pre-harvest and post harvest technology.
- (g) To own lands, pre-cooling vans, machinery, plants and vehicles.

There are classes of membership in this society:

Sl. No.	Class	Members
1.	'A' CLASS	<ol style="list-style-type: none"> (a) Agricultural produce market committees (b) District central co-operative banks (c) Maharashtra state agricultural marketing board (d) Any other institution doing the business of marketing (e) The state government (f) The central government (g) NCDCC (h) NABARD (i) NHB (j) Any other institution , society under any any act

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Sl. No.	Class	Members
2.	"B" CLASS	(a) individual flower producers (b) individual engaged in research of new technology like bio-tech methods (c) individuals engaged in temperature management, humidity control, pre-cooling techniques and cool chains (d) individuals engaged in export-import business of technological equipments (e) individuals engaged in packing and transporting of perishable goods like flowers (f) individuals who are interested in floriculture production (g) individuals working as clearing house agents etc.

The Maharashtra industrial development corporation (MIDC) has set up a floriculture park "THE TALEGAON FLORICULTURE PARK". This park has various objectives:

- to serve as a gateway to the flower traders to capture both domestic as well as international markets.
- to provide business opportunities to the entrepreneurs to invest in the nurseries and other production units.
- it covers 500m² of area to provide a space for the entrepreneurs to stay in the farm.
- it provides all the cooling techniques and packing facilities.
- it has well maintained testing labs.

Floriculture in Delhi

Delhi covers 1878 ha of area under flower crops. Delhi is the market best suited for wholesalers in the areas of:

- Baba Kharak Singh Marg
- Mehrauli
- Fatehpuri Mandi, Khari Baoli.

It is known that these markets trade several lakhs of flowers during season. Delhi has a biggest retail market of flowers at Cannaught Place (CP). These markets deal with all kinds of flowers. Government has set up nurseries for large varieties of flowers. These are:

- sunder nursery in nizamuddin (owned by CPWD)
- chirag nursery in chirag delhi (owned by DDA).

The prices of the flowers are at peak during the festive seasons like diwali, and marriage seasons.

TRADE OF CUT- FLOWERS IN INDIA (EXPORT-IMPORT)

The research paper aims at studying the growing business of cut flowers in India.

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Exports from India

The cultivation of flowers especially cut flowers is quite popular all over the world. Flowers have a huge demand in the global market. Many countries export flowers and India is one of them.

According to the research India's export have declined from 2007-08 to 09-10. in the year 2007-08 the quantity and the value of exports was 36254.31 MT & 34024.25 LACS respectively. But in 2009-10 the quantity and the value have declined to 26814.51 mt and 29446.38 lacs respectively.

Product Wise Export

Based on the data by APEDA, the qty and value for cut flowers i.e roses, carnations have increased but the exports for fresh cut flowers and flower buds for bouquets and orchids have decreased to zero.

This decline is because the exports are not encouraged. Due to infrastructural problems like bad interior road, inadequate refrigerated transport and storage facilities, lack of professional back up of delivery etc., Indian exporters are facing problems.

India Export of Agro Food Products Product Group Report/Item Wise

Value in Rs. Lacs
Qty in Mt.

Product: Floriculture

HsCode	Product	2007-2008		2008-2009		2009-2010	
		Qty	Value	Qty	Value	Qty	Value
06049900	Not Fresh foliage, branches and other parts of plants without flowers or flower buds and grasses for bouquets or for ornamental purpose	19,509.45	15,790.13	19,167.77	18,082.07	15,660.67	13,584.02
06039000	Dried, Dyed, Bleached, impregnated or otherwise prepared Cut flowers and flower buds for bouquets or for ornamental purpose	9,177.58	7,031.57	7,473.54	7,108.66	6,247.31	5,933.26
06029030	Tissue Culture Plants	234.45	2,852.08	94.79	3,807.47	270.10	2,770.05
06031900	Other Cut flowers and flower buds	0.00	0.00	2,424.22	3,898.55	1,740.33	2,368.97
06031100	Roses	0.00	0.00	176.53	326.30	1,004.23	1,658.62
06024000	Roses, grafted or not	51.76	59.96	24.45	257.24	505.91	1,181.40
06029090	Other	644.83	539.82	366.63	966.53	204.54	595.39
06029020	Flowering plants (excl Roses and Rhododendrons)	972.70	1,427.84	148.56	1,333.30	71.61	342.70
06011000	Bulbs, tubers, tuberous roots, corms, crowns & rhizomes, dormant	129.38	183.95	130.99	256.06	129.54	241.18
06012021	Chicory Plants	164.49	194.27	122.62	163.79	317.06	178.24
06022090	Other Trees, shrubs and bushes	74.74	114.99	100.48	77.76	413.46	137.42
06049100	Fresh foliage, branches and other parts of plants without flowers or flower buds and grasses for bouquets or for ornamental purpose	216.66	238.42	54.15	100.88	48.99	119.96

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HsCode	Product	2007-2008		2008-2009		2009-2010	
		Qty	Value	Qty	Value	Qty	Value
06012090	Other than Chicory Plants and Roots	269.57	159.28	76.70	149.43	81.70	95.65
06012010	Horticultural Bulbs	13.02	23.26	10.86	29.93	22.63	61.70
06023000	Rhododendrons and azaleas, grafted or not	0.00	0.00	0.00	0.00	1.14	49.75
06021000	Unrooted cuttings and slips	8.83	17.86	9.50	57.25	5.71	43.98
06031200	Carnations	0.00	0.00	1.08	3.63	20.19	27.10
06012022	Chicory Roots	18.72	83.79	350.04	179.40	21.27	19.74
06041000	Mosses and Lichens for Bouquets or for ornamental purpose	203.28	406.21	32.77	38.72	13.44	18.87
06022010	Edible fruit or nut trees, grafted or not	31.63	5.91	1.37	4.14	33.20	16.09
06022020	Cactus	0.00	0.00	0.00	0.00	0.91	1.43
06031400	Chrysanthemums	0.00	0.00	0.04	0.14	0.58	0.81
06029010	Mushroom spawn	3.75	9.83	0.30	0.29	0.01	0.03
06031000	Fresh Cut flowers and flower buds for bouquets or for ornamental purpose	4,515.86	4,875.24	0.00	0.00	0.00	0.00
06031300	Orchids	0.00	0.00	30.96	39.86	0.00	0.00
	Total	36,240.70	34,014.41	30,798.35	36,881.40	26,814.53	29,446.36

Source: DGCIS Annual Export

IMPORTS OF CUT FLOWERS TO INDIA

Based on the research made by APEDA, there are 26 countries which have exported cut flowers to India. In 2009, the total import qty is 4060 mt with a value of 12\$US Million. It is researched that the maximum export is from Netherlands with a qty of 11176 mt and a value of 4 US\$ Million. In 2008, the total import was 5627 mt with a total value of 17US\$ Million, which means that the import of floriculture products including cut flowers has decreased.

From this we can say that both import and export have decreased which is not good for the growth of flower business.

RELATED RESEARCHES

Research by floriculture today magazine under the heading "Indian floriculture awaits a serious action plan to take growth targets forward" states that the imports are rising and exports are decreasing and soon India will become a regular importer of flowers. It says china looks like an emerging significant supplier. But he says that the despite of falling export and rising import the domestic demand is rising.

Also, the government of India is taking steps to provide support to the sector. Corporate houses are encouraged to set up units with global scale and size so that they can meet global quantity demands.

Research by Dr. Debashish Sengupta discusses about the decreasing exports of floriculture and how to improve the marketing strategies of flowers in the paper "integrated cold chain supply management in floriculture".

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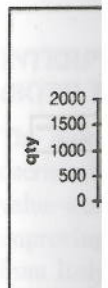
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METHODOLOGY

A comparative analysis of export and import is to be studied on the basis of the secondary data collected from APEDA, Floriculture Marketing in India by Dr. Debashish Sengupta and Raj Kamal and from a magazine called "Floriculture today" for the years 2007, 2008, 2009.

Analysis is done using graphs and trend. The sample size is five countries dealing in flowers of the world.

Data of Export of Cut Flowers from India

Sl. No.	Countries	2007-08		2008-09		2009-10	
		Qty. (MT)	Value (Lacs)	Qty. (MT)	Value (Lacs)	Qty. (MT)	Value (Lacs)
1.	Japan	1835.02	3277.27	965.34	1790.97	970.92	1558.74
2.	United Arab Emirates	660.23	684.57	762.70	991.75	971.65	1071.14
3.	Italy	1228.13	958.80	1268.31	1373.33	1453.65	814.41
4.	Canada	546.88	558.78	782.35	1135.33	534.14	769.02
5.	Australia	513.31	636.54	312.14	827.22	345.17	756.76

Data of Import of Cut Flowers to India

Sl. No.	Countries	2007		2008		2009	
		Qty. (MT)	Value (US\$MIL)	Qty. (MT)	Value (US\$MIL)	Qty. (MT)	Value US\$MIL
1.	Japan	-	-	-	-	-	-
2.	United Arab Emirates	59.00	0.00	180.00	2.00	71.00	1.00
3.	Italy	20.00	0.00	8.00	0.00	91.00	0.00
4.	Canada	-	-	-	-	-	-
5.	Australia	2.00	0.00	5.00	0.00	-	-

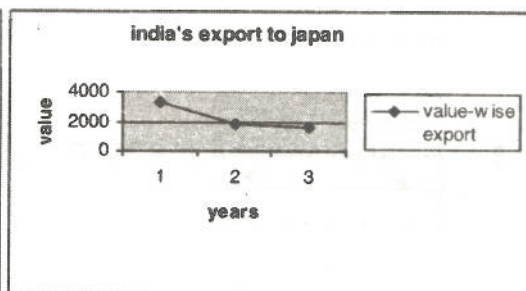
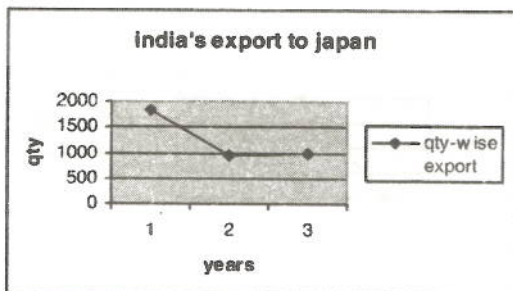
GRAPHICAL REPRESENTATION OF EXPORT & IMPORT OF CUT FLOWERS BETWEEN INDIA AND FIVE COUNTRIES OF THE WORLD

Trade of Cut Flowers with Japan

India's Export of Cut Flowers to Japan

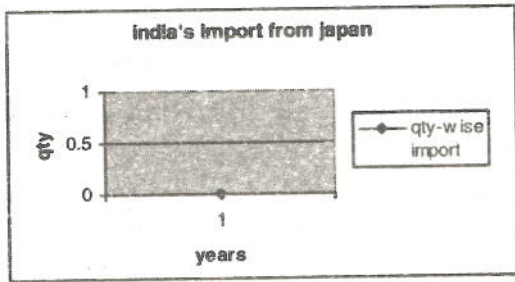
(a) Qty-wise export of cut flowers

(b) value-wise exports of cut flowers

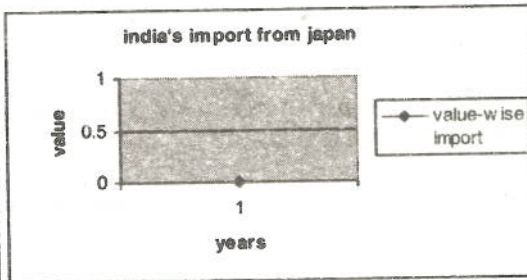


India's Import of Cut Flowers from Japan

(a) qty wise import of cut flowers



(b) value wise import of cut flowers



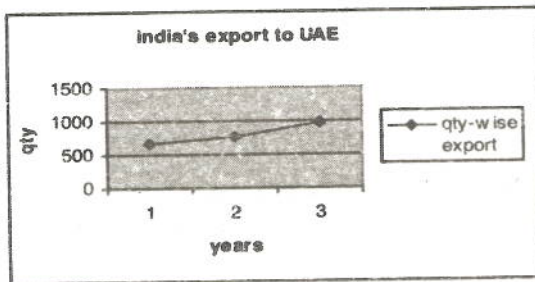
INTERPRETATION OF THE ABOVE GRAPHS (BOTH EXPORT-IMPORT)

The exports have increased quantity wise while value-wise the exports have decreased. Also, the imports of cut flowers from Japan to India both quantity and value wise is zero. Therefore, there is a scope of increase in the export of cut flowers from to Japan.

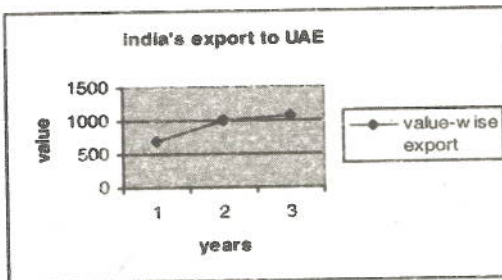
Trade of Cut Flowers with United Arab Emirates (UAE)

India's Export of Cut Flowers to United Arab Emirates (UAE)

(a) qty-wise export of cut flowers

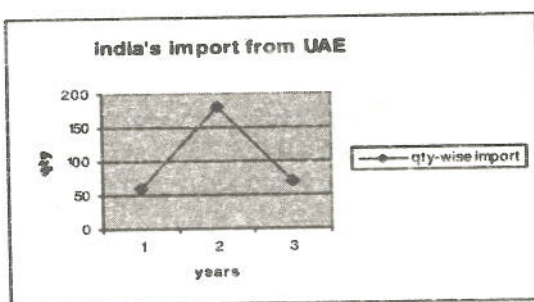


(b) value-wise export of cut flowers

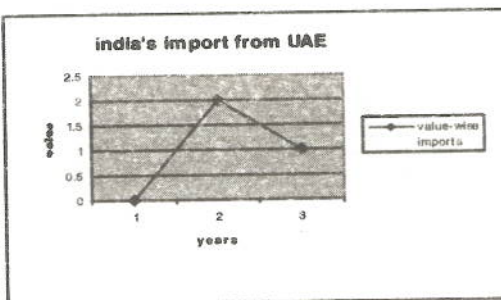


India's Import of Cut Flowers from United Arab Emirates (UAE)

(a) qty-wise import of cut flowers



(b) value-wise import of cut flowers

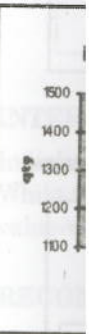


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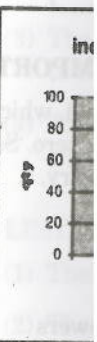
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**INTERPRETATION OF THE ABOVE GRAPHS
(BOTH EXPORT AND IMPORT)**

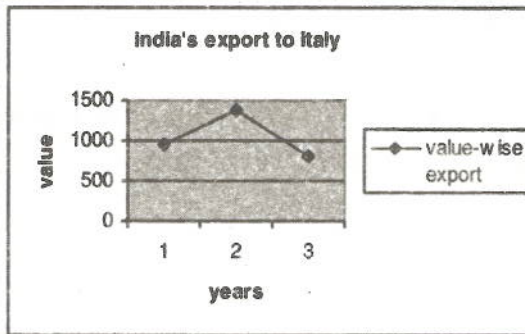
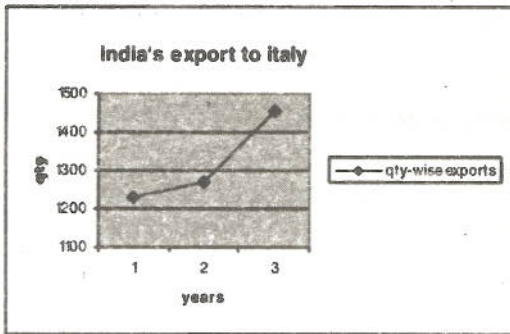
According to the above graphs, the export (both quantity and value wise) of cut flowers from India to UAE has increased, which is a positive thing. While the imports (both quantity and value wise) of cut flowers from UAE to India has decreased. This is better for India.

Trade of Cut Flowers with Italy

India's Export of Cut Flowers to Italy

(a) qty-wise export of cut flowers

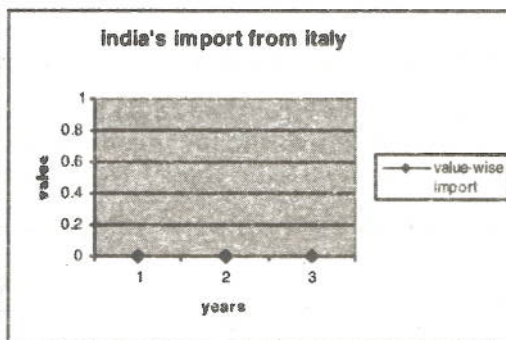
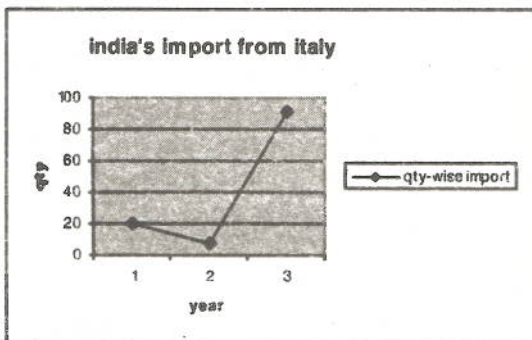
(b) value-wise export of cut flowers



India's Import of Cut Flowers from Italy

(a) qty-wise import of cut flowers

(b) value-wise import of cut flowers



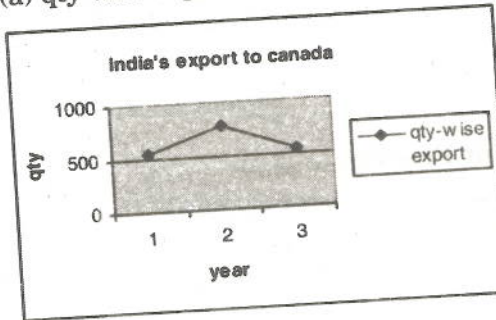
**INTERPRETATION OF THE ABOVE GRAPHS
(BOTH EXPORT AND IMPORT)**

The quantity-wise export to Italy has increased but the value-wise exports have decreased. While the quantity-wise imports from Italy to India has increased but the value-wise imports are zero and constant. So, the government of India should work on improving the value-wise exports and should try to decrease the quantity-wise imports from Italy.

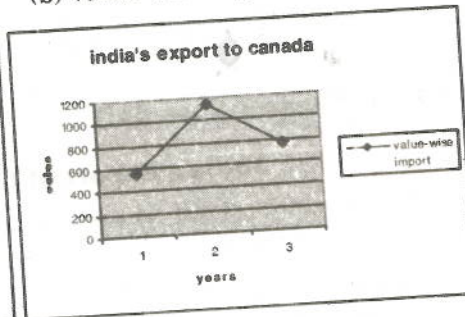
Trade of Cut Flowers with Canada

India's Export of Cut Flowers to Canada

(a) qty-wise export of cut flowers

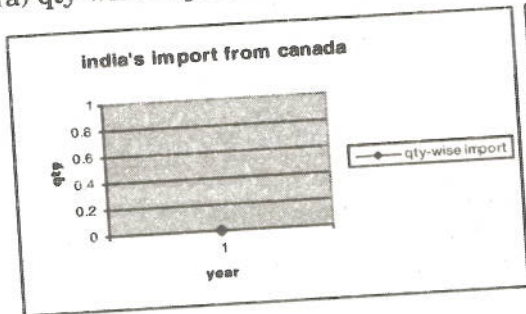


(b) value-wise export of cut flowers

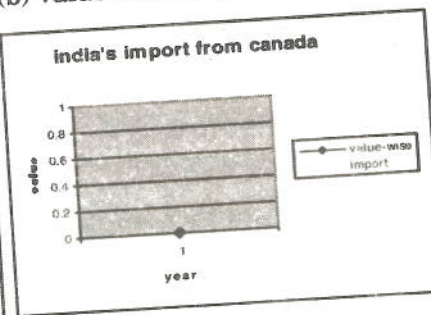


India's Import of Cut Flowers from Canada

(a) qty-wise import of cut flowers



(b) value-wise import of cut flowers

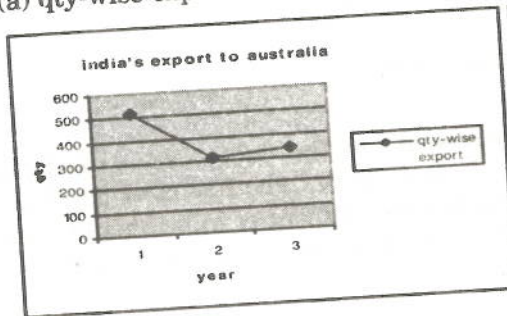


INTERPRETATION OF THE ABOVE GRAPHS (BOTH EXPORT AND IMPORT)
 The exports to Canada from India both quantity and value wise have decreased, which is not a good sign. While the imports from Canada of cut flowers to India are zero. So, the government of India should try to improve the export position of the country.

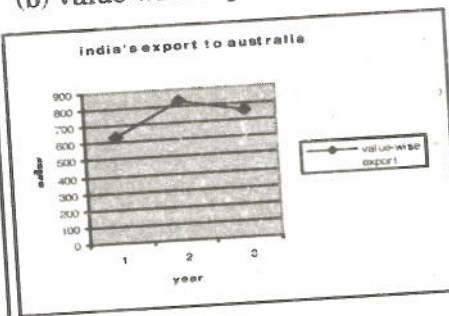
Trade of Cut Flowers with Australia

India's Export of Cut Flowers to Australia

(a) qty-wise export of cut flowers



(b) value-wise export of cut flowers



INTERPRETATION
 India's exports to Canada both quantity and value wise have decreased, which is not a good sign. While the imports from Canada of cut flowers to India are zero. So, the government of India should try to improve the export position of the country.

RECOMMENDATIONS
 (1) Government should try to improve the export position of the country.
 (2) Introduction of new products to increase the value of exports.
 (3) The government should try to improve the export position of the country.
 (4) The government should try to improve the export position of the country.

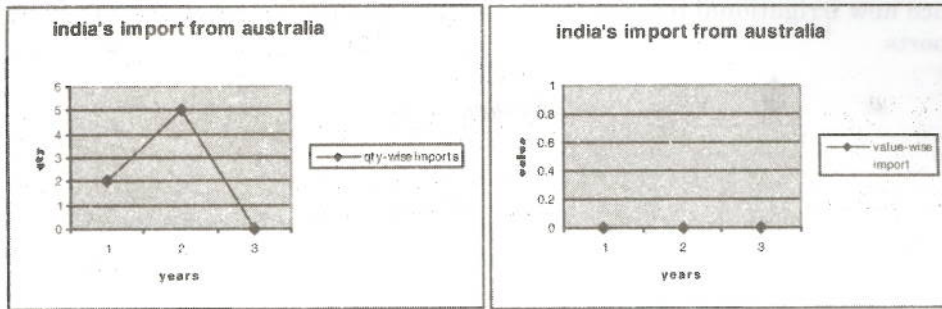
LIMITATIONS
 (1) The sample size is small.
 (2) The data is only for three years.
 (3) The data is only for cut flowers.
 (4) A small number of countries are included.

CONCLUSION
 In the context of cut flowers, India's exports to Canada both quantity and value wise have decreased, which is not a good sign. While the imports from Canada of cut flowers to India are zero. So, the government of India should try to improve the export position of the country.

India's Import of Cut Flowers from Australia

(a) qty-wise import of cut flowers

(b) value-wise imports of cut flowers



INTERPRETATION OF THE ABOVE GRAPHS (BOTH EXPORT AND IMPORT)

India's exports of cut flowers have increased only quantity-wise and not value-wise. While the quantity-wise imports of cut flowers from Australia has decreased and the value-wise imports are zero.

RECOMMENDATIONS

- (1) Government of India should increase the area under cut flowers to increase the exports and reduce the imports.
- (2) Introduce new export promotion policies of flowers in India. With increased globalizing, it is becoming an important part for the growth of flower business in India.
- (3) The growers should be given training and special programmes should be initiated to increase their knowledge in the production
- (4) The growers should learn new techniques for the production of cut flowers and should improve the quality of seeds used.

LIMITATIONS OF THE STUDY

- (1) The study is limited to the import and export of the cut (modern) flowers
- (2) The export and import of cut flowers is studied for only five countries.
- (3) The lack of sufficient research in this area made it difficult to investigate.
- (4) A small sample size may have affected the results obtained.

CONCLUSION

In the changing economy, the government of India should initiate the growth of cut flower industry. The government should make efforts to increase the export of cut flowers. In today's scenario, the dealers of the flowers i.e. growers, retailers, wholesalers and consumers should have full knowledge about the flower trade.

The business of flowers is still in its growth stage and it can be increased by the efforts made by government of India through various programmes, seminars, conferences, floriculture journals etc. As India has a fertile land, therefore it should introduce new irrigational techniques to increase the production of flowers to improve the exports.

Refernces

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Sengupta Debashish, Kamal Raj (2010), Floriculture Marketing in India. Excel Books, First Edition: New Delhi.

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