

National Green Centre

St. Louis, Missouri
January 9-10, 2011



Ball Horticultural Company

History of Innovation in Floriculture



Ball Horticultural Company

WWII and before – “hobby”
industry—no bedding plants



Ball Horticultural Company

1950's & 60's
“Let's create an industry”

Bedding plant industry was born

Plastic flats

Soilless mixes

F₁ hybrids

Year-round mums



Ball Horticultural Company

1970's & 80's
“Let's get more efficient”

Singulated plugs

Efficient greenhouse structures

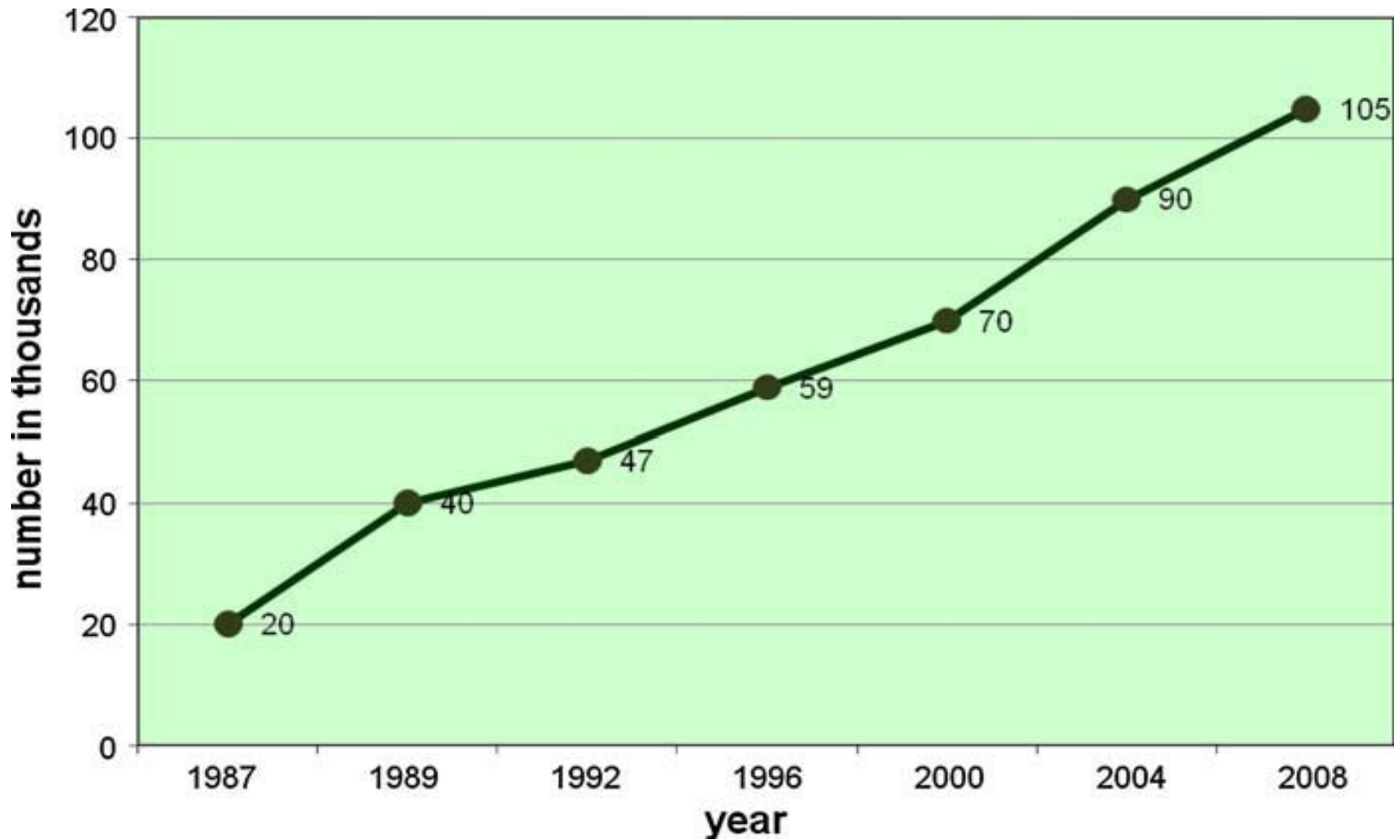


Ball Horticultural Company

1990's to Now

“Let's offer more choices”

- Containers
- Baskets
- New classes
- New varieties



Number of horticultural cultivars offered (1987–2008).
Sources: Isaacson (1987, 1989, 1993, 1996, 2000 & 2004)



Ball Horticultural Company

What's next?



Ball Horticultural Company

Trend:



Ball Horticultural Company

Sustainability

A driver of innovation
throughout your organization



Ball Horticultural Company

Complete transparency

Imagine everything you do in
your greenhouse gets printed
in the newspaper



Ball Horticultural Company

Nutrition Facts

Serving Size 1 bar (35g)
Servings Per Container 6

Amount Per Serving

Calories 170
Calories from Fat 80

% Daily Value*

Total Fat 9g 14%
Saturated Fat 1.5g 8%
Trans Fat 0g
Cholesterol 0mg 0%
Sodium 80mg 3%
Total Carbohydrate 19g 6%
Dietary Fiber 2g 8%
Sugars 8g
Protein 4g

Iron 2% • Vitamin E 6%

Not a significant source of vitamin A, vitamin C and calcium.

* Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs:

	Calories:	2,000	2,500
Total Fat	Less than	65g	80g
Sat Fat	Less than	20g	25g
Cholesterol	Less than	300mg	300mg
Sodium	Less than	2,400mg	2,400mg
Total Carbohydrate		300g	375g
Dietary Fiber		25g	30g

Ball

Ball Horticultural Company

Sustainability

Sustainable Facts	
<i>per 1000 Geranium plants</i>	
Carbon Balance	
<i>Carbon Sequestrene</i>	0.15 ton
<i>Carbon Used in Heating & Transportation</i>	1.0 ton
Resources Used	
Pesticides (mg ai)	3.2
<i>Category I</i>	0.6
<i>Category II</i>	0.8
<i>Category III</i>	0.9
<i>Category IV</i>	1.0
<i>Biological Control</i>	yes
Water (Kliter)	
<i>Applied</i>	11.5
<i>Runoff</i>	8.6
Waste (kg)	
<i>Plastic</i>	30
<i>Paper</i>	15



Ball Horticultural Company

What is the number one
way to increase
sustainability in our
industry?



Reduce Shrink!



Ball Horticultural Company

Where did all the Plants go??

1-Seed Production – 26%

2-Distribution – 13%

3-Young Plant Production – 20%

4-Finish Production - 12%

5-Retail – 9%

6-Consumer – 8%



Trend:



Ball Horticultural Company

Social Media



Ball Horticultural Company

A marketing revolution

Talk With Your Customers, Not At Them



Old Marketing



Jay Baer's Convince & Convert

New Marketing

Wave[®] Ultimate Garden Center

- **Goals:** Renew excitement for the Wave brand in its 15th anniversary year. Improve sell-thru at retail.
- **Audience:** Retailers and Big Box stores
- **Insight:** The online D.I.Y. guide offers retailers ideas and tools to customize their Wave displays, improve their Wave knowledge, and engage shoppers through in-store events. It fosters brand ambassadors at the retail level.

Ball



Ball Horticultural Company

Burpee Garden Coach™

- **Goal:** To message to our target consumer in a unique and contemporary manner.
- **Audience:** Novice and younger home gardeners
- **Insight:** Our consumer is becoming more comfortable with inviting mobile devices into her life. Burpee Garden Coach creates an interactive experience and offers the gardening advice and information she needs in the way she wants to receive it.



Ball

Ball Horticultural Company

BFP-TV

- **Goal:** To give every grower access to the right culture and growing information direct from the product experts at Ball FloraPlant.
- **Audience:** Growers
- **Insight:** The growing product rep team of Ball FloraPlant now has an ongoing communication with growers. From videos on production, to breeding, to in-the-field examples, an easy-access learning experience is created.

Ball

Ball FloraPlant. YouTube



Ball Horticultural Company

- Back and forth communication
- Lack of control
- Videos!
- Just do it

Lack of control
Facebook is key
Videos are future



Trend:



Ball Horticultural Company

Consolidation—at every level
Keeps on going



Ball Horticultural Company

Breeder
Distributor
Grower
Retailer
Consumer



Ball Horticultural Company



Ball

Ball Horticultural Company



What does consolidation do?

- Lowers prices/margins
- Puts power in fewer people
- Eliminates non-serious players
- Increases standardization/automation
- Changes innovation

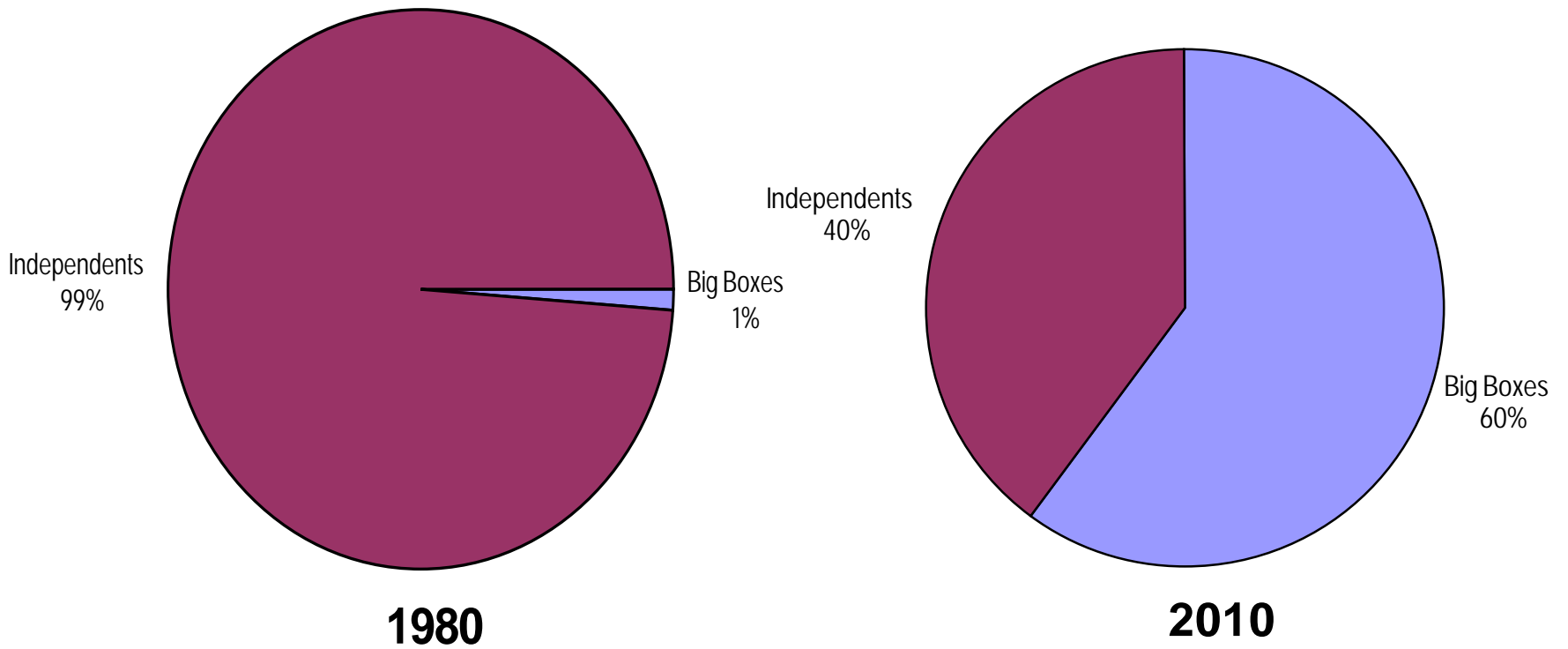
- Harmonizes quality standards
- Takes cushions away
- Raises need for professionals

Horticulture vs. Office Supply



Ball Horticultural Company

Who Sells Plants?



Challenge:

- Maintain large and small growers
- Maintain Big Box and Independents

Important advantages to big and small!



Trend:



Ball Horticultural Company

Intimidation and Confusion at Retail

Still!



Ball Horticultural Company

Retail experience for young generation and novice gardeners and decorators



Ball Horticultural Company

“My friend going into a garden center has the same experience as my grandmother going into Best Buy.”



Ball Horticultural Company

We continue to overestimate the
consumer's knowledge
Crescent Community Gardeners



Ball Horticultural Company

Challenge:

Make it easy for the consumer!
Gardening is not intuitive like the
iPhone



We need to make it simpler and
simpler and simpler

“With all the information
available now, shoppers are
much more ignorant than they
used to be about plants.”



Ball Horticultural Company

“As Close to Silk as
Possible”



Ball Horticultural Company

“My friends want to garden
with clean hands.”



Ball Horticultural Company

Trend:



Ball Horticultural Company

Gardeners
vs.
Decorators
Still meaningful labels?



Gardening

- Lifelong process—the journey, not the destination
- Sustained activity over time
- Takes knowledge/practice
- In the ground
- Many small plants
- Never dies

Decorating

- Short-term—instant gratification
- Changes with moods
- Takes no knowledge
- Must be fast
- Fewer finished containers
- On the deck/terrace
- Dies at end of each season

Decorators want:

- Finished or almost-finished plants
- “Wow” color instantly
- Plants as decoration—part of outdoor living

Challenge:

How do we appeal to both?
Does it matter?



Ball Horticultural Company

Always look for the
counter-trend....
Slow Gardening?



Trend:



Ball Horticultural Company

Ornamental edibles

Edible landscaping



Ball Horticultural Company



Ornamental Edibles

Lettuce are so decorative!

Ball

Ball Horticultural Company

“I don’t like vegetable gardens
but I like vegetables in my
garden.”



Ball Horticultural Company

No more 10 X 10 Victory
gardens.

Mix vegetables and flowers.



Ball Horticultural Company



Ball

Ball Horticultural Company



Ball

Ball Horticultural Company



Villandry uses the most beautifully coloured vegetables.

Ball

Ball Horticultural Company

Trend:



Ball Horticultural Company

Product Blending

Is it an annual?

A perennial?

A vegetable?

A woody?



Who Cares?



Ball Horticultural Company

Is it a phone?

Is it a camera?

Is it a watch?

Is it a GPS?



“The industry talks
segregation. The consumer
thinks integration.”



Ball Horticultural Company

“Give us
Perennials that look like annuals”



Ball Horticultural Company

“Give us Annuals that act like
perennials”



Ball Horticultural Company

Trend:



Ball Horticultural Company

Natives -- or



Ball Horticultural Company

Does the consumer want natives
or just low-maintenance plants?
or drought-tolerant plants
or?



Russian Tanks?



Ball Horticultural Company

Get Wild



Ball Horticultural Company



E

y



ESCH

Dan Horticultural Company



NOTICE

This property is in violation of
Glen Ellyn's Weed Ordinance,
Title 7, Chapter 12, which states that
all weeds shall be cut to a length not
greater than eight inches.

Please bring this property into
compliance by 6/29/10
If you are not the property owner,
please forward this notice to the
proper party.

If this property is not brought into
compliance by the above date, the
Public Works Department will mow
and bill the current owner a
minimum of \$190.00.

Thank you for your cooperation.

VILLAGE OF GLEN ELLYN
PUBLIC WORKS DEPARTMENT
(630) 469-6756

Ball

Ball Horticultural Company

Trend:



Ball Horticultural Company

Locavores (Wal-Mart!)



Ball Horticultural Company

By 2015 Wal-Mart will sell
\$1 billion in food from 1MM
small and medium farmers

Double sales of locally-grown
produce



Ball Horticultural Company

Trend:



Ball Horticultural Company

Stories: J.Crew Starbucks 5 Guys



Ball Horticultural Company

Stories in Horticulture

They are everywhere

- Product
- Uses
- Careers
- Greenhouse Histories

Antidote to high tech

Consumers (and employees)
want inspiration



Ball Horticultural Company

Stories:

Tell me facts, I'll forget

Tell me the story, I'll
remember

Stories inspire

Facts bore



Ball Horticultural Company

- Black Petunia
- Purple Wave
- Serena Angelonia

Hard to Do!



Ball Horticultural Company

Stories must be:

- Short/simple
- Compelling
- Appeal to emotions
- Honest

Story of Education

18th Century—Instill
democracy



Ball Horticultural Company

19th Century—assimilate
immigrants/Melting Pot



Ball Horticultural Company

Now/Future.....?



Ball Horticultural Company

Floriculture's Mission

1900-1950—"Let's give people cut flowers for special occasions"



Ball Horticultural Company

1950-1980—“Let’s create
the bedding plant industry
to decorate new
suburbia.”



Ball Horticultural Company

1980-2010—“Let’s give the consumer a huge choice with lots of cool new plants.”



Ball Horticultural Company

Now/Future.....?



Ball Horticultural Company

Trend:



Ball Horticultural Company

Flowers not just for
pretty anymore!



Ball Horticultural Company

New era for plants

What is the future relationship
between plants and people?



Ball Horticultural Company

Gardening/Landscaping for
beauty?



Gardening/Landscaping for
three 'E's?

Economic increases in

- Property values
- Tax revenues
- Tourism
- Shopping
- Energy reduction

Environmental

- Oxygen maker
- Carbon sequester
- Wind breaks
- Erosion prevention
- Noise reducer
- Water purification

- Shade to reduce energy
- Storm water retention
- Indoor air purifier
- Wildlife space

Emotional (+ Health)

- Crime reduction
- Shorter hospital stays
- Enhanced creativity
- Reduced blood pressure
- Sense of community

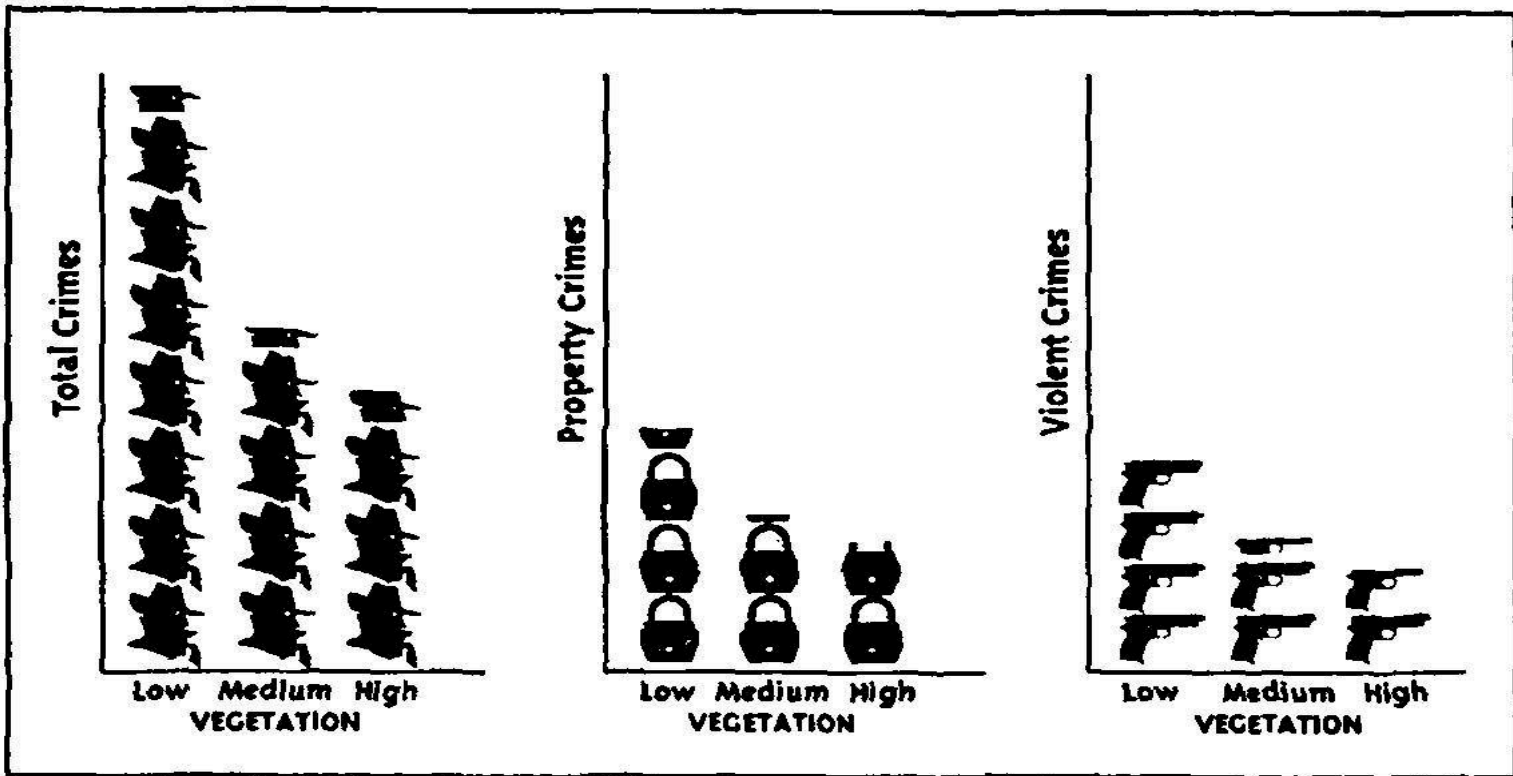


Figure 3: Mean Number of Crimes Reported Per Building for Apartment Buildings With Different Amounts of Vegetation (each icon represents one reported crime)



Ball

Ball Horticultural Company



Ball

Ball Horticultural Company



AND



Ball

Ball Horticultural Company

For every trend
there is a countertrend



Ball Horticultural Company

“Don’t believe anything you read
or hear!”

“Everything you know is wrong.”



Ball Horticultural Company



Ball

Ball Horticultural Company

aball@ballhort.com



Ball Horticultural Company