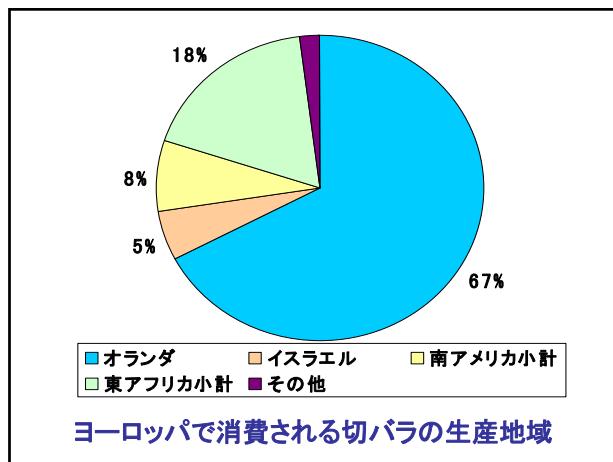
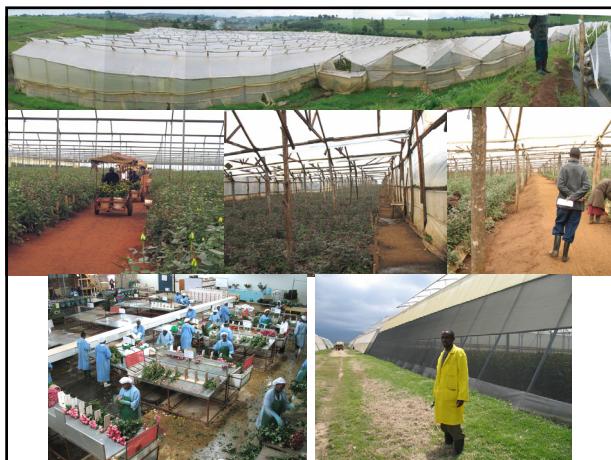
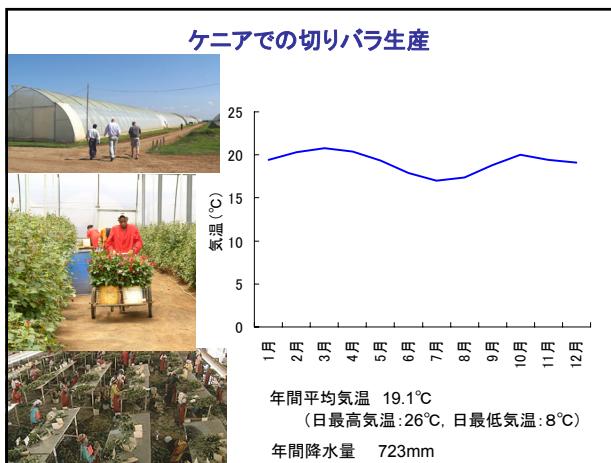


**ヨーロッパへの切りバラの輸出 1985~1997 (1000 US\$)**

|        | 1985    | 1993    | 1995    | 1997    |
|--------|---------|---------|---------|---------|
| オランダ   | 133,005 | 290,466 | 398,407 | 456,327 |
| イスラエル  | 20,981  | 33,133  | 30,831  | 35,378  |
| コロンビア  | 7,893   | 12,317  | 15,464  | 17,653  |
| エクアドル  | -       | 8,038   | 19,902  | 33,405  |
| ケニア    | 749     | 11,862  | 36,163  | 62,832  |
| ジンバブエ  | -       | 14,244  | 33,024  | 39,435  |
| ザンビア   | -       | 2,356   | 4,795   | 9,254   |
| タンザニア  | -       | 590     | 3,617   | 5,406   |
| ウガンダ   | -       | -       | 2,595   | 5,154   |
| マラウイ   | -       | 946     | 2,654   | 2,023   |
| アフリカ小計 | 749     | 29,998  | 82,848  | 124,104 |

From [http://eea.ethiopiaonline.net/Econ-foc/ef2-2/eskinder.J2-2.htm]





**Quality Control**

- Cut stage
- Colour
- Stem length
- Stem weight
- Bud count
- Batch weight
- Colour
- Colour rec. ratio
- Colour rec. design
- Box packing
- Boxed flower count
- Product handling
- Flower count
- Cold Chain
- Correct labelling of product and boxes.

**Care and Concerns for the Environment**

Water and Waste Management

Oserian's Waterland

Oserian has implemented a wastewater treatment system to purify the factory run-off water stored in collection of natural rainfall. The wetland consists of a gravel-bed and three ponds designed to process this water by filtering, reducing the amount of nutrients and organic matter. This wetland also provides habitat for a variety of birds, frogs, fish (introduced) and insects. Staff at Oserian make regular use of the area as a place to rest, during lunch breaks.

Other waste management includes our own Compost section, recycling of inputs such as plastic and timber and the correct use of pesticides.

**Oserian**

ABOUT US | CONTACT US | JOBS & CAREERS | WEATHER & CLIMATE | NEWS & EVENTS

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Fact Files

"More than anything, I must have flowers, always, always."  
Claude Monet

BOPP  
オランダ Max Havelaar  
MPS  
FairTrade国際認証

**British Ornamental Plant Producers' Certification**  
**KFC Silver Member**

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**Supply Chain**

The Supply Chain animation below gives an overview of the 'Seed to Sale' process.

Stage 1: Breeding, Oserian's Research & Development Lab. The first stage of the 'seed to sale' Oserian concept and process. Either through internally based T-Cells, with external breeders, or with breeders and propagators, decisions are made on crop, volume, colour and variety and plant behaviour.

1 2 3 4 5 6

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**Packhouse**

Long-stemmed flowers are often the final customer destination – and the way the do it depends on how the flowers are cut. The way the flowers are treated after harvest helps determine how long they will last in a vase. Oserian uses a unique post-harvest treatment involving:

- quality control
- water measurement control
- a clean refrigerated environment and
- keeping flowers hydrated and hydrated with care.

The Packhouse is arguably the 'hub' of all Oserian operations. Production fields grow the flowers that go to the Packhouse, which then processes them for distribution to florists and other customers. The Oserian Packhouse is the largest Packhouse in the world and a highly automated operation. Three distinct functions take place in the Packhouse: Quality Control, Flower Processing and Quality Control. Each function is headed by a qualified and experienced personnel.

1) Oserian Packhouse. The largest stand-alone Packhouse in the world

Efficient storage and processing within a temperature-controlled facility allows Oserian to be a leader in the industry, adding up to an average of 7 stems per minute and producing 1.5 million graded stems in a day.

**Oserian**

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**Quality Control**

Quality Policy Statement

- Cut stage
- Foliage
- Head size
- Stem length
- Stem strength
- Stem Weight
- Bloom count
- Bunch weight
- Colour

切り前  
葉の状態  
花の大きさ  
切花長  
茎の堅さ  
切花の重さ  
花数  
花束の重量  
色

- Colour mix ratio's
- Colour mix design
- Box packing
- Box colour mixes
- Product handling
- Times of process
- Cold Chain
- Correct labelling of product and boxes.

花色の混合比  
色合わせ  
箱詰め  
花束の色混合  
花束の形態  
花束処理  
コールドチェーン  
正確なラベル表示

**Oserian**

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**Corporate Social, Ethical and Environmental Responsibility**

Oserian currently houses over two thirds of its employees plus their dependants in our Housing Estates. These estates are well developed and maintained, with modern facilities and amenities. Oserian spends USD 250,000 every year in upgrading existing accommodation and constructing new houses. The housing is in the form of estates which are well planned, secured and quiet throughout the day. The estates are self-contained and provide a safe and secure environment for the employees and their families. Oserian employees and their families live respectfully and harmoniously as colleagues and neighbours.

The estates are managed to ensure comfort, security, health and hygiene for all residents. They are located with easy access to local schools, medical facilities and shopping areas. The estates have modern facilities and the properties have a well-developed and maintained sewage and drainage system and the company has over 100 employees on site at any one time. The estates are well planned and designed to accommodate the needs of the employees in the estates and a committee comprising of Oserian (Officer) and management ensure compliance.

Other welfare is shown by in the Housing Estates as the Oserian schools, Oserian provide FREE SCHOOLING by running 1 secondary school, 3 primary schools, 3 kindergartens and 2 state of the art Crèches. These facilities benefit over 2,000 children belonging to Oserian and spouses.

1) Oserian schools

Providing training with a healthy work-life balance, benefits of the diverse health, health, frequency and

**Oserian**

ABOUT US | CONTACT US | JOBS & CAREERS | WEATHER & CLIMATE | NEWS & EVENTS

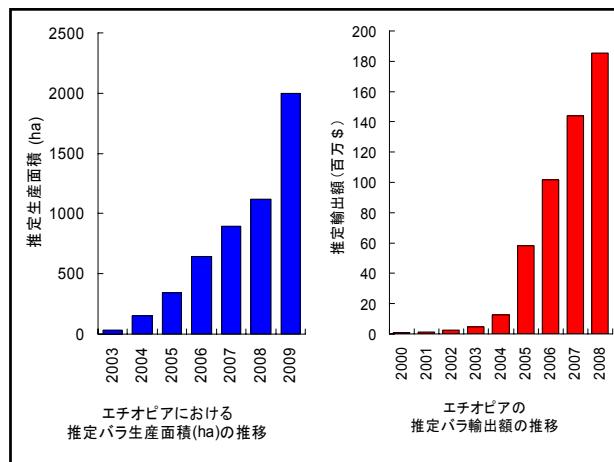
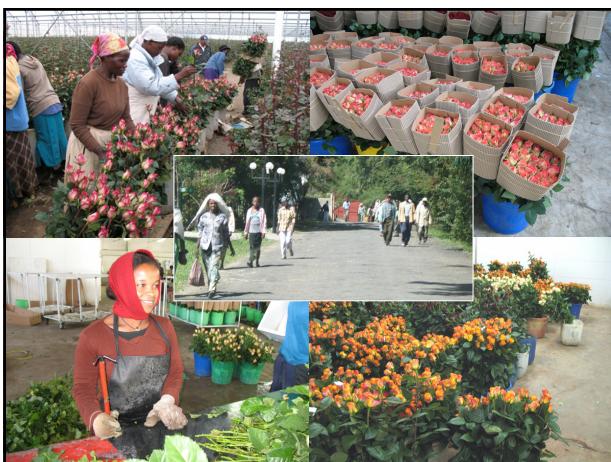
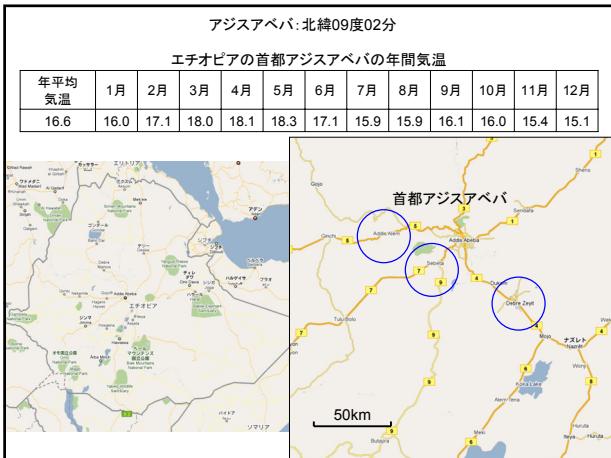
Products  
Processes  
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**Care and Concern for the Environment**

Lake Naivasha is an international concern, with its surroundings in a natural beauty. The water supply and fertile soils have made it one of the prime horticultural regions in Kenya. Oserian's track record is a good steward of the environment and Lake Naivasha dates back to the origins of the firm. Oserian has invested in water harvesting and recycling methods to increase water usage.

1) Hippo on the lake front

As part of our endeavour to ensure that Oserian is well assessed through ISO 14001 Environmental Impact Assessment, we conducted an exercise to determine what adverse impacts on the environment a project, activity or process may have. It is a tool for protecting the environment and ensures that environmental impacts are considered and managed. The environmental impact assessment process also identifies opportunities for institutional and social aspects of the up-coming project. Adverse impacts are mitigated. It is also a mechanism to assess the environmental performance of the organization. As a leading founder and committed participant of the NGO Lake Naivasha Growers Group and as a member of the Lake Naivasha Growers Association, Oserian plays a full part in trying to ensure that the Lake and environment is conserved for the benefit of future generations.



### エチオピアのバラ生産の特徴

- ✿ エチオピアは地下資源が乏しい(国民が資源)
  - 外貨獲得のための、国策としての切花生産
  - 低人件費(0.5~1\$/日)と多数の勤勉な労働力
- ✿ 標高2000~2500mの熱帯高地(年間一定した気温)
  - 無暖房、軽装備(低額の設備費)
- ✿ 高原台地に広がる広大な農地(広大な生産面積)
  - バラの農場は1ha/日の割合で増加
- ✿ 企業資本による切花生産
  - 高度な生産技術と製品管理

### 先進消費生産国である オランダの国際化対応戦略

#### オランダの花き戦略①

##### 【高品質化】

2002年6月のアールスメール仲卸会社  
「Cultra」でのバラ価格



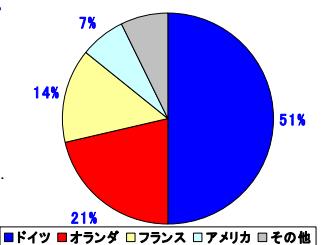
イスラエル産 長さ50cm 1本30円  
ケニア産 長さ60cm 1本25円  
オランダ産 長さ80cm 1本50円  
オランダ産 長さ90cm 1本76円

#### オランダの花き戦略②

##### 【差別化（育種）】

###### オランダのバラ育種会社

Dam Rozen  
Delbard International  
Hilverda Plant Technology  
Interplants B.V.  
Jan Spek Rozen B.V.  
Lex+  
Moerheim Roses & Trading B.V.  
Oli Rosen  
Preesman  
Schreurs de Kwakel  
Select Roses B.V.  
Stockman Rosen  
Terra Nigra  
De Ruiter's New Roses International B.V.

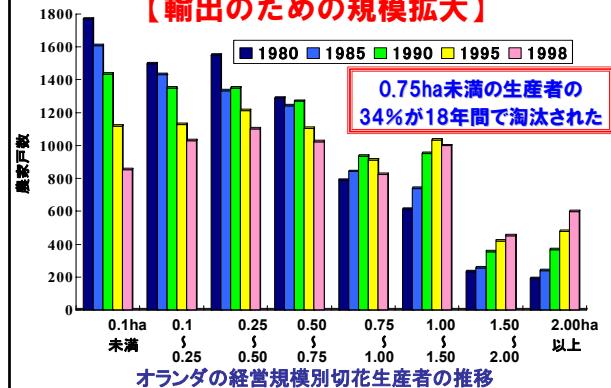


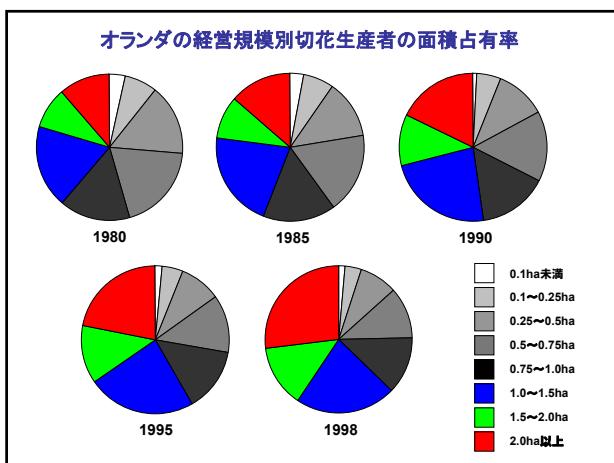
###### オランダのバラ育種会社



#### オランダの花き戦略③

##### 【輸出のための規模拡大】





**オランダの花き戦略④**  
**【輸出のための品種・技術普及】**

中荷園芸有限公司（上海市）

オランダ資本の生産技術普及センターと品種展示農場  
オランダの生産施設と品種のPRと販売のための施設

**anthura**  
 Anthuriumweg 14  
 2666 ZV Dordrecht, The Netherlands  
 Tel. (31) 10-522 04 44 / Fax (31) 10-521 82 20

**オランダの花き戦略④**  
**【人件費削減のための省力化】**

**省力化** 人件費:3500円/時間 → 労働生産性の向上:1時間あたりの生産性



**オランダのバラ生産**

90円／本(小売価格) 50円／本(小売価格)  
 コロンビアから輸出されたバラのアメリカでの販売価格 → 30~60円

**省力化** 人件費:2500円/時間 → 労働生産性の向上:1時間あたりの生産性

**低コスト生産**

**単肥配合**

**発電と暖房**  
 (コジェネレーションシステム)の導入

**病害対策**

