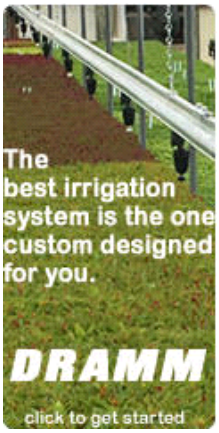
Fall in River Ridge; Are mums down? 122 years of consolidation



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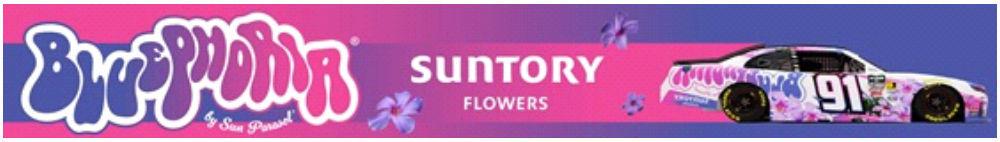
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COMING UP THIS WEEK:

The Fall RR Report is out!
Are mums down everywhere?
Silver Fern on consolidation
Suntory is off to the races!
Vertical farms in empty offices?
Glass Tulip-winning varieties
Costa earns marketing kudos
Finally ...





The Fall RR Report is out

If there's a nip in the air (hey, in Orlando, 74F is considered nippy!), it must be time for the annual Fall River Ridge Report, brought to you by Sun Gro Horticulture. I just hit send on the 2026 edition, which was compiled by my right-hand man Paul Black and his wife, Annie. But I did the number-crunching in comparison with previous year's results. You can link to this year's report HERE (although you should have gotten it in your inbox).

In a nutshell, fall/Halloween decorating was UP three percentage points from last year, from 63%









of River Ridge residents to 66%—a good sign!

But on the not-so-good side of the coin, fewer of the folks decorating utilized our products—flowering plants. That number fell from 43% of decorators last year to 32% this year. Bummer! But I chalk it up to mild fall weather that has kept the summer annuals looking pretty. I don't know that for certain, but it sounds good. I suggested that perhaps folks will still pick up a mum or two before Thanksgiving. Oh, the 10-year average is 35%.



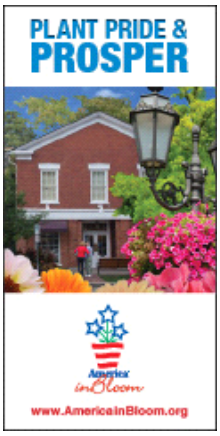
One thing I neglected to do in my special coverage newsletter is compare fall to spring. So I have just pulled up the Spring 2026 River Ridge Report, which showed a somewhat opposite result: Overall gardening in River Ridge was down this spring—from 59.5% of households last year to 55% this year. However, the number of folks gardening with containers (both mixed and monoculture) climbed 4 percentage points to 83% of gardeners. That's above the 10-year average of 81%.

So overall, mixed news from my old neighborhood—nothing drastic, just the ordinary ebbs and flows of gardening and decorating, I think.

How was fall in your version of River Ridge? Weigh in HERE.







Are mums down everywhere? You tell me!

River Ridge's fall flower decline got us to wondering: are mums down elsewhere? Also, fellow editor Bill Calkins told us he's heard that the fall garden mum season has been soft. But I know two things: we usually hear bad news from folks experiencing bad news. Folks experiencing good news are too busy to talk about it. Also, for every trend there is a countertrend. For everyone who is down there is somebody else who's making a killing … and vice-versa.



So we decided to ask! Bill posed the question to the Greenhouse Tech Team Facebook group he administers. He didn't ask permission to share the results, so I will only do so anonymously. Here are some replies:

"Sunpatiens, Whopper begonias still looking good in November. No one wants to take them out to plant a mum that lasts 3-4 weeks. More people buying one or two for the porch."

"Retail and wholesale are both off. It's been this way for several years in a row now. Going to cut way back next year on our mum production."

"Average sales at retail. Down on commercial wholesale (an annual trend). Annuals have been lasting longer with no freeze/frost and superior genetics, so the commercial accounts are going right to cabbage/kale to save money."

"We had a slow start but it kicked into overdrive! First time in 19 years we sold out! We grew even more than the last five years and plan on diversifying into more fall varieties for '27. We grow and do retail sales."

"Way off for us in southern Indiana. We grow about 27,000 and we've sold out every year, we've been doing it for about 15 years. Not this year—we've had to dispose of about 10% because they were spent. We're about 90% wholesale. Fundraisers, grocery chain, farm markets, and nurseries."

"They look great! Just haven't had a freeze yet, so everyone's summer annuals still look great, too! Sales are a little off."

"Sold 85%. I was pleased. We are retail with a fundraiser. We did a few sales at the end to move last few."

"Small retail grower in Michigan. It was a slow start. But once they got rolling they moved right out."

"Slow sales at retail in New Jersey. Partly due to five straight Sundays of rain and a Saturday to boot."

“Georgia, retail. Sales were good. We grew more 8-inch this year and sold out. We’ll bump up the 14-inch next year since those sold out fast.”

“Slower both wholesale and retail.”

“Very slow mum sales this year.”

As I count it, eight out of twelve respondents said sales were down—67%. But that also means 33% were up. In other words, for every trend, there’s a countertrend.

What was your trend—up, down or flat? And what should we be selling along with mums to maybe make the mums more interesting? Weigh in HERE. (And see my “Finally …” for some inspiration.)



122 years of industry consolidation, courtesy of Silver Fern

Every time there’s an M or an A in this business (merger or acquisition), I write about it. Been doing so for 33 years in *GrowerTalks* and for 23 years in this newsletter. But I’ve never had the reason, inclination or time to list every single deal on one piece of paper.

Silver Fern has. They publish an annual industry report, and this year’s is called “Growers Buying Growers.” They say it reports on 825 transactions across 172 years of consolidation in ornamental horticulture, from 1854 to 2026, assembled from 3,186 public sources. Whew!

Of course, they used AI to do the heavy lifting—otherwise they’d be like me: no time to do it!

Who is Silver Fern? Silver Fern is a horticulture software company founded in 2020 by a pair of young, savvy van Wingerdens and a third business partner, whose collective motivation was to build software around *real* greenhouse workflows rather than force growers to adapt to generic business software.

The gents in question are Adam van Wingerden, CEO; his brother Stephen, CIO; and Kevin Short, CFOO. John Beauford, previously the president of Advanced Grower Solutions (see merger announcement), serves as CTO. Adam and Stephen are the sons of Ken van Wingerden, formerly of Floral Plant Growers in Maryland and co-founder of the former Color Point Nursery in Kentucky. Adam, Stephen and Kevin all did stints at Color Point, Adam as Director of Sales & Marketing, Stephen as Director of Enterprise Architecture, and Kevin as Business Architecture Manager. They’ve got degrees in software, finance, accounting and business; but more importantly, they’ve got real-world, hands-on greenhouse experience. So they know what *real* greenhouse workflows look like.

Their software product is called Work Suite—it’s an Enterprise Resource Planning (ERP) system that has artificial intelligence built into its fundamental design (AI-native is what you call that). It’s designed for nurseries, greenhouses and orchards to manage production, forecasting, fulfillment, replenishment and customer ordering all on one platform, one data layer, one API (an API is an Application Programing Interface—a way for two or more separate software programs to talk to each other and exchange information). They say Work Suite is for growers of all sizes, not just the big van Wingerden-sized operations; you can start small and add modules (there are five—FULFILL, PRODUCE, FORECAST, RESTOCK and Customer Portal) as you grow.

But enough of the free publicity! Here’s how they summed up 172 years of industry consolidation:

- The 2020s have been the busiest dealmaking era in this research: 256 deals since 2020, more

than the 195 from the entire 2010s. 2025 alone logged 54 deals, the most of any single year.

- Succession is the leading reason on the seller's side. 141 deals were triggered by an owner retiring or handing over the business. Other reasons included strategic sales to a larger operator, distress, private capital, and estate breakups. For 378 of the 822 deals, no clear reason was publicly available.

- The top is pulling away: The largest growers' share of reported Top 100 footprint rose from 6.8% to 16.9% since 2009, while the median ranked grower got 16% smaller.

- The buying is spread wide: 628 distinct buyers closed the 822 deals, and 571 of them bought exactly once.

- The same operations keep selling: 31 sold, in whole or in part, in two or more separate years, with a median of 10 years between sales of the same operation. Hines Horticulture is the most extreme example, sold in seven separate years.

- The headline prices are not typical of the market: of the 21 deals since 2010 with a public dollar price, the median was $8.6 million, and 12 came in under $10 million.

Fascinating, guys! Thanks to you and your AI chatbot for doing the legwork.

Access the whole report (and learn more about Silver Fern) HERE.

VIBRANT
PW PROVEN WINNERS

Suntory is off to the races

I just learned that one of our industry flower breeders is going to get a bit of high-speed publicity this weekend when the No. 92 Chevrolet Camaro SS driven by Josh Williams takes to the track at Homestead-Miami Speedway sporting "Suntory Flowers" on its lower-rear quarter panels. The last time I remember a professional race car carrying a horticulture sponsorship was when Scotts Miracle-Gro sponsored Carl Edward in NASCAR around 2005 to 2011. Josh competes in NASCAR's O'Reilly Auto Parts Series, which is one step down from the top-level Cup cars, but still, it's cool!



I learned about the deal from Suntory's Delilah Onofrey, who first learned of the opportunity from the DGM Racing Team for a San Diego race, but then said, "Let's do Homestead!" since so many of Suntory's Sun Parasol plants are grown in South Florida. Plus, DGM Racing is based in Florida, so it works out that they will be able to have the No. 91 Bluephoria car on display at their TPIE tradeshow booth in January.



The showcar, not the race car. This much sponsorship would probably cost millions.

Pairing with primary sponsor Optum, a healthcare technology company, is a good fit. Optum organizes the Josh Williams Hospital Tour, in which Josh visits children's hospitals before each race—that's where the colorful handprints on the race car originate.

The day before the race, Friday, November 6 (perhaps as you read this), the No. 91 display car featuring full Suntory Sun Parasol Bluephoria livery will be on display at Flamingo Road Nursery in Davie, Florida, surrounded by hundreds of Sun Parasol plants for sale. They'll even have Bluephoria smoothies in the café.

The race is Saturday, November 7. It airs at 5 p.m. Eastern on The CW and streams on ESPN Unlimited. Josh has 17 top 10s in 265 starts in the O'Reilly Series, but no wins yet, so perhaps some flower power will bring him luck!



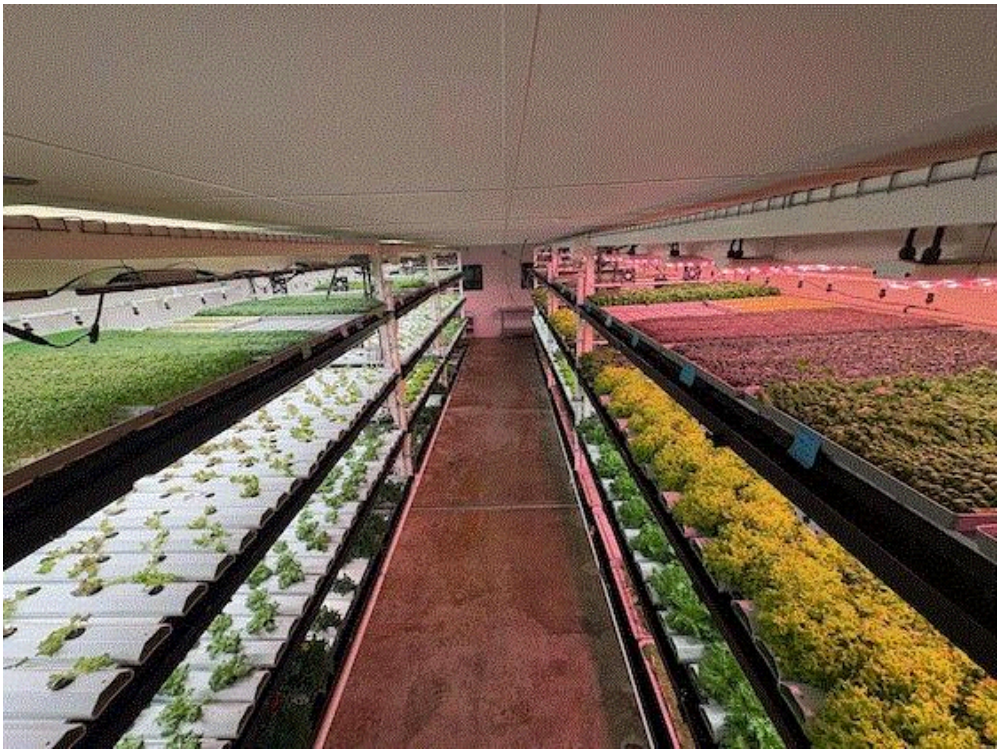
Vertical farms in empty office space?

Are there not enough stories of vertical farm failures to nip these crazy ideas in the bud?

I heard THIS STORY on NPR's morning edition about a Chicago entrepreneur who wants to turn empty Chicago office space (of which there is 40 million square feet, or more than 1,000 acres) into vertical farming space to grow vegetables for the city's restaurants, caterers and even other offices.

The gentleman behind the idea is Russell Steinberg, founder and CEO of FARMZERO. A real-estate developer who came up with the idea during COVID, he touts all the usual benefits of

vertical farming: less water, few food miles, healthy, pest-free, etc. His main office on N. LaSalle St. has a small (1,000 sq. ft.) farm on the 18th floor that has been growing various greens, herbs and edible flowers since 2024.



But look, we all know the problems with vertical farms, right? They are tremendously expensive to set up and operate; the logistics of multiple small locations would be a nightmare; energy use is very high; and we all know insects and diseases LOVE plants grown in warm, humid rooms. Not to mention food safety concerns. Labor. And labor unions. And the building's engineering and water, electrical and elevator infrastructures.

I can show you a spot at O'Hare airport that used to be home to a vertical farm that was going to supply the airport's restaurants with fresh greens. There's another defunct vertical farm here in Orlando at the Orange County Convention Center. These projects just don't scale, nor do they deliver the promised benefits and hoped-for returns.

I don't know of a better use for 1,000 acres of empty office space. But growing herbs and microgreens isn't a viable option.



Dutch auction presents its annual Glass Tulip Awards

The Dutch are perhaps crazier about "what's new?" than even we are, so it's worth taking a look at the market introductions that are catching the eyes of the judges in Royal FloraHolland's annual "Glazen Tulp Award," which recognizes the three best introductions in five categories: cut flowers, concepts, flowering houseplants, green indoor plants and garden plants.

Growers submit novelties throughout the year. During the summer the five best in each category are selected, with an independent professional jury selecting first, second and third prize. They

were presented October 8 in Aalsmeer.

Cut Flowers Winner: Lilium Double Blizz



The highest distinction in the Cut Flowers category was awarded to Lilium Double Blizz from Moerman Lilium. The jury was impressed by the flower's unique shape, which reminded them of a lotus flower. The lily stands out strongly within the existing assortment and has an exceptional wow factor.

Second Place: Hydrangea Royal Highness



Third Place: Sarracenia



Flowering Houseplants Winner: Lilium Roselily Nowa



Lilium Roselily Nowa by Decorum and Van Schie Nursery won the Flowering Houseplants category. The jury praised the striking combination of its double-flowered form, unique coloring and pollen-free characteristics. Its long-lasting bloom and high ornamental value make it highly attractive.

Second Place: Queen Kalanchoe ElseFlowers Emilie



Third Place: Tillandsia Preziosa





Glazen Tulp Awards (continued)

Green Houseplants – Dracaena goldieana



The expert jury selected Dracaena goldieana from Valstar Shadowplant as the winner in the Green Houseplants category. The plant stood out for its distinctive leaf pattern, exotic appearance and broad consumer appeal.

Second Place: *Ceropegia linearis* Luuk



Third Place: *Ficus lyrata* Yvora



Garden Plants – Miscanthus sinensis 'Lady in Red'



Miscanthus sinensis Lady in Red from Plantipp B.V. and Hoogeveen Plants was particularly appreciated for its spectacular leaf color transition and its combination of ornamental value and ease of use. The ornamental grass delivers a strong visual effect in the garden throughout multiple seasons.

Second Place: Heuchera Eternal Flame



Third Place: Hosta Silly String



Concepts - Wardians Terrarium – Kokedarium Triton



The award went to Wardians Terrarium—Kokedarium Triton from Wardians. According to the jury, this terrarium is a concept with strong future potential and opportunities for further expansion. The

combination of design, experience and sustainability creates a distinctive product that can easily be further developed.

Second Place: Boutique Collection



Third Place: *Crocus sativus* Saffron Bloom & Gold





Costa Farms earns honors for marketing

The Costa Farms marketing team, led by VP of Marketing Mari Carrasquillo, has been named one of the Top 10 Marketing Teams at the 2026 OnCon Icon Awards. OnCon (which is new to me) is a members-only executive networking, education and awards organization headquartered in Daytona Beach.



The OnCon Icon Awards recognize outstanding marketing teams worldwide through peer and public voting. The awards spotlight teams that show exceptional creativity and strategic excellence in their industries. This year's nominees included well-known organizations such as NAACP, 1-800-Flowers.com, and First Financial Bank.

The Top 10 Marketing Team award recognized the Costa team's innovative marketing strategies, strong thought leadership, and the impact it has made on the company and the horticulture industry as a whole.

Costa Farms stood out for its fresh approach to promoting the brand both in-store and online. The team's digital strategy includes podcast episodes, consumer quizzes, plant blogs & profiles , and high-quality educational content. Partnerships with plant-care technology brands such as Planta and Flourish have engaged new audiences. In-store, the team uses POS materials, plant tags, and signage to reach shoppers at the shelf.

"Our team's dedication to innovation and collaboration has been at the heart of our success," said Mari. "From the content we create to the way our marketing showcases the quality and sustainability of our plants, everything we do is focused on inspiring consumers and growing a passionate plant community."

The award also recognizes Costa Farms' leadership in bringing plants into everyday home décor and gifting traditions. The marketing team lives the company's mission, "All Thumbs Are Green," by connecting consumers of every skill level with the beauty and benefits of plants.

Congrats to the whole team!



Finally …



Fall mums may be down in many places, but it's not for lack of support from our resident hortistician Dr. Marvin N. Miller, whose annual fall pumpkin and flower display is as bountiful as ever. I asked Marvin for a rundown on this year's display:

"The photo was taken October 14. In the background off to the left are Sunpatiens, Caladiums and Redhead Coleus. Closer to the pumpkins off to the left is Coleus Marble Mania, and scattered around the perimeter of the pumpkins are some leftover (from summer) coleus Kong Red, Marigold Durango Yellow and some newly planted Matrix pansies. Off to the right are some Dragon Wing Red begonias. In the middle of the pumpkins and gourds are various flowering kales and mums.

"The only thing that has changed since taking the photo is that the caladiums have decided some of our nights have been too chilly, so they have faded, some different mums are now peaking and the tree has lost almost all of its leaves. Oh, and the squirrels have begun gnawing on some of the pumpkins.

Marvin gives credit where credit is due. Mums, kale and pansies were grown by Galema's Greenhouse in West Lafayette, Indiana. Pumpkins and gourds, the corn stalks, and the hidden hay bales were from Pumpkins on Hobbs in Elgin, Illinois; Yaeger Farm Market in DeKalb, Illinois; and Windy Acres Farm in Geneva, Illinois. And of course design, labor, financing, transportation and photography by Marvin N. Miller.



Feel free to email me at beytes@growertalks.com if you have ideas, comments or questions.

See you next time!



Chris Beytes
Editor-in-Chief
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