



2021 年美國蘭花市場

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松井苗圃公司 (Matsui Nursery, Inc.)

摘要

對 2021 年蘭花市場的期望：

- 需求在整體上稍微增加，但預期要到 2022 年才會充分恢復。
- 持續大量向超市販售。
- 商業環境（飯店、餐廳）對蘭花的需求增加。
 - 但這可能因餐旅業的財務問題而減少。
- 特殊活動對蘭花的需求增加。
- 消費者對家庭裝飾用的蘭花之需求持續成長，但一旦人們開始從事這一年來遭禁止的活動時，這項需求則可能減少。

美國蘭花產業面臨的挑戰：

1. 物流和供應鏈問題
 - a. 植物供給減少
 - b. 國際運輸成本增加了及延誤問題
 - c. 國際運輸的挑戰影響植物與非植物的供應
2. 獲利壓縮
 - a. 直接和間接的勞工成本皆提高了
 - b. 美元貶值

美國蘭花產業的因應方式

- 轉嫁增加的成本？
- 購買較多的成熟植物，將風險從美國養植者轉移至海外植物供應者。
- 最小限度的設施擴展或升級（如果有的話）
- 小型美國蘭花養植者轉為特約養植



簡歷

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松井泰瑞莎是成功領導組織經歷過渡期和危機，並具高度影響力的資深管理人。在多變及不斷演變的商業環境中掌舵，泰瑞莎迅速評估組織的內在優勢及關鍵需求，再發展出向前邁進的永續道路。她以開放的心胸面對不同客戶、與之建立信賴關係，並獲得各類工作人員的信任和忠誠。

泰瑞莎的產業經驗包括特色農業、多區加盟餐旅營運、不動產融資及資本籌集。她目前為松井苗圃公司 (Matsui Nursery, Inc.) 的董事長兼執行長，松井苗圃是營收 3 千萬美元的蘭花盆栽生產商。松井苗圃由她父親松井紀潔 (Andy Matsui) 於 1967 年創辦的。泰瑞莎在 2014 年回到加州松井苗圃協助她父親，最初擔任財務長，最後於 2015 年擔任董事長兼執行長。

她最初的努力乃是著眼於建立有意義的內部控制及可適時彙整出財務報告的必要程序與紀律。隨後針對銷售和生產進行合理化的改革，因此提升營業效率及改善獲利，相關措施包括結束二個無法獲利的營業單位及撤除產品生產線。泰瑞莎也開始為公司規劃未來的領導團隊。

除了領導松井苗圃之外，泰瑞莎也領導其父母為支援薩萊納山谷和蒙特利郡中未受到政府足夠關切的學生的教育，所建立的松井基金會 (Matsui Foundation)。在泰瑞莎的領導下，松井基金會已發出 380 萬美元獎學金給註冊就讀大學、研究所和職業學程的當地學生。

泰瑞莎也擔任太平洋縱谷銀行 (Pacific Valley Bank) 的獨立董事。

在回到松井苗圃前，泰瑞莎領導企業進行不動產聯貸與餐旅。她共同創辦的不動產聯貸公司 (美國集團) 在 1980 年代中期以私下募集和公開證券發行的方式，籌集幾近 2500 萬美元股本發展或收購 30 間飯店。她代表 2,000 名投資者，擔任其受託人。1992 年，她創辦 InnWorks，為自大西洋岸至太平洋岸 10 個州 21 間加盟飯店的危難投資組合提供日常例行管理。泰瑞莎及其餐旅專業團隊進行多管齊下的整備活動，因此恢復獲益能力及財務穩定性，並使工作場所依紀律和有原則的程序運作。

身為 InnWorks 的執行長，泰瑞莎負責飯店品牌建立和加盟決定、飯店處置和收購，以及發展諮詢專案。她也帶領債務人和債權人進行多項協商。



多年來，泰瑞莎累積的名聲使她成為受人敬重的思慮周延的領導者、演說者和受訪者。在帶領松井苗圃和松井基金會期間亦曾擔任福布斯農業科技峰會（Forbes AgTech Summit）、環保農業協會會議（EcoFarm Conference）和坎普登美洲家族企業會議（Campden Americas Families in Business Conference）的小組成員。身為 InnWorks 的領導人，《紐約時報》曾在一篇有關飯店加盟的主要文章中專文報導泰瑞莎，此文亦在飯店業出版品中受到廣泛引述。

泰瑞莎取得伊利諾州伊州埃文斯頓西北大學凱洛管理學院的企管碩士學位，以及麻州劍橋哈佛大學的文學學士學位。

泰瑞莎和丈夫現居於加州蒙特利。



The Orchid Market in the United States-2021

Teresa Matsui, Matsui Nursery, Inc.

Abstract

Expectations for the orchid market in 2021:

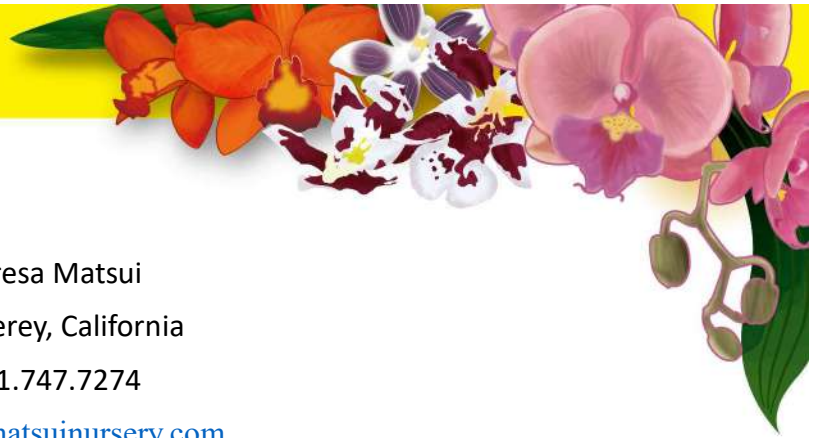
- Slight overall increase in demand, but full recovery not expected until 2022
- Continued strong sales to supermarkets
- Increased demand for orchids in commercial spaces (hotels, restaurants).
 - But this may be mitigated by financial problems in the hospitality sector.
- Increased demand for orchids for special events
- Continuation of consumer demand for orchids for home décor, although this may wane as people engage in once-prohibited activities

Challenges confronting the US orchid industry:

1. Logistics and supply chain issues
 - a. Plant supplies down
 - b. Higher international shipping costs and delays
 - c. International shipping challenges affect both plant and non-plant supplies
2. Profitability Squeeze
 - a. Higher labor costs, both direct and indirect
 - b. Declining value of US dollar

Responses by the US orchid industry

- Pass on higher costs?
- Purchase more mature plants, transferring risk from US growers to overseas plant suppliers
- Minimal, if any, facilities expansion or upgrades
- Smaller US orchid growers shift to contract growing



Introduction

Teresa Matsui

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Teresa Matsui is a high-impact senior executive who has successfully guided organizations through transitions and crises. Navigating shifting and evolving business conditions, she quickly assesses an organization's underlying strengths and critical needs, then develops a sustainable path forward. She establishes openness and credibility with disparate constituencies and gains the trust and loyalty of diverse workforces.

Teresa's industry experience includes specialty agriculture, multi-unit franchise hospitality operations, real estate finance, and capital formation. Currently, she is President and Chief Executive Officer of Matsui Nursery, Inc., a \$30 million potted orchid producer. Matsui Nursery was founded by her father, Andy Matsui, in 1967. In 2014, Teresa returned to California and Matsui Nursery to assist her father, first as Chief Financial Officer, then ultimately as President and CEO in 2015.

Her initial efforts centered around establishing meaningful internal controls, as well as the procedures and discipline necessary to produce timely financial reports. She next focused on rationalizing sales and production, resulting in significant operational efficiencies and improved profitability. This included closing two unprofitable locations and eliminating product lines. Teresa also began to shape the future leadership team for the company.

In addition to leading Matsui Nursery, Teresa also heads the Matsui Foundation, a private foundation established by her parents to support the educational endeavors of underserved students in the Salinas Valley and Monterey County. Under her leadership, the Matsui Foundation has disbursed \$3.8 million in scholarships to local students enrolled in undergraduate, graduate, and vocational programs.

Teresa also serves as an independent board director of Pacific Valley Bank.

Prior to returning to Matsui Nursery, Teresa led enterprises in real estate syndication and hospitality. The real estate syndication firm she co-founded (The USA Group) raised nearly \$25 million in equity in the mid-1980s for the development or



acquisition of thirty hotels via private placements and public securities offerings. She served as a fiduciary on behalf of 2,000 investors. In 1992, she founded InnWorks to provide day-to-day management for a distressed portfolio of twenty-one franchised hotels in ten states, coast-to-coast. Teresa and her team of hospitality professionals executed a multi-pronged turnaround campaign that resulted in restored profitability and financial stability, and workplaces that operated under disciplined and principled procedures.

As InnWorks' chief executive, Teresa was responsible for hotel branding and franchising decisions, hotel dispositions and acquisitions, and development consulting projects. She also took the lead in multiple workout situations, both as debtor and creditor.

Over the years, Teresa honed her reputation as a respected thought leader, speaker, and interviewee. In her capacities with Matsui Nursery and the Matsui Foundation, she has been a panelist at the Forbes AgTech Summit, the EcoFarm Conference, and the Campden Americas Families in Business Conference. As head of InnWorks, Teresa was featured in a major New York Times article on hotel franchising and was widely quoted in hotel industry publications.

Teresa received her MBA from the Kellogg School of Management, Northwestern University, Evanston, IL, and her AB from Harvard University, Cambridge, MA.

Teresa and her husband reside in Monterey, California.