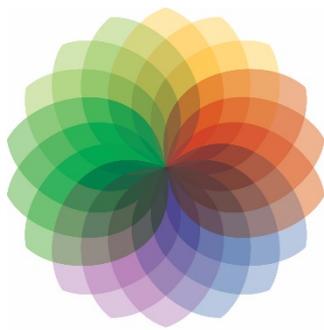




## Coronavirus Global Impact Survey on The Ornamental Horticultural Industry (Part 2)

*Global participants who are happy to share their Survey responses*



**AIPH**



FloraCulture International

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## Greenlife Industry Australia – Australia

*Peter Vaughan*

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Ensuring that Government guidelines for health and hygiene and social/physical distancing are implemented and adhered to.

### **How are your sales comparing to the same period last year?**

Better

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

For the greenlife, nursery and ornamental horticulture industry in Australia, the support mechanisms of the Government stimulus packages has not really been relevant as the support can only be applied for if turnover has dropped by 30% over a specific time period. As advised training has been stronger than usual.

### **What longer-term impacts do you expect from this crisis:**

Also, hard to tell long term implications. Demand has been strong with limited supply due to heading into Autumn when the pandemic hit and now into Winter as restrictions are lifted. The most significant impact could be meeting demands in Spring

### **Has your government recognised the specific challenges facing ornamentals growers?**

Yes as they have been advised by the industry association.

### **What lessons have you learned through this crisis that could help other countries?**

The situation in the Southern Hemisphere is different to Northern Hemisphere. The challenge for Australia is to ensure there will be enough greenlife and nursery stock for Spring.

### **Can you provide an example of a successful business initiative during Covid-19 pandemic?**

Those businesses implementing the health, hygiene and distancing guidelines. Having a separate entrance and exit.

## AVBS - Belgium

Pieter Van Oost

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Stay home if you have a cold/disease. Use a shopping car (it is disinfected every time). Only touch products that you take with you, do not put products back. Follow directions from shop staff. Disinfect your hands using the gel offered at the entrance. Come shopping alone as much as possible. Keep 1.5m away from our store staff or other customers. Also, in the parking lot. Only pay with payment card or contactless.

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

There is a bridging right for companies that had no sales for seven days (between 1,200 and 1,600 euros / month depending on the family situation). There is a nuisance premium of 4,000 euros for companies that were obliged to close their store (not really applicable for production, but for companies with B2C sales). There is a compensation premium of 3,000 euros for companies that are not obliged to close but have a loss of more than 60%. This applies to the production companies, but it is not yet certain whether this can be combined with the emergency fund. There is a fundamental commitment from an emergency fund, the modalities and budgets would be decided by the government on Friday.

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before the crisis?**

It all depends to the different support that the member states will give to the companies. Hopefully they are more or less similar that there is no other concrete position.

### **Has your government recognised the specific challenges facing ornamentals growers?**

Yes. It was difficult to explain that living plants are not the same as manufactured products.

### **What lessons have you learned through this crisis that could help other countries?**

We need more collaboration between the supply chain.

### **Can you provide an example of a successful business initiative during Covid-19 pandemic?**

Local webshops are rising from producer to consumer, some of them will continue after the Covid-19 pandemic. Some of them will cancel this way of working.

## Cooperativa Veiling Holambra – Brazil

André van Kruijssen

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

All measures proclaimed by the WHO. Not all garden centers are open. Governors may require closure by state and mayors may require closure by city.

### **How are your sales comparing to the same period last year?**

Much worse

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

From the government or banks the growers don't have to expect help. Any loan from a bank has high interest and requirements. The cooperative helped by early payment of the member loan and lower the operational taxes.

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before the crisis?**

We don't have many imported plants/flowers. Imported flowers from Colombia we have less due to the high dollar rates.

### **Has your government recognised the specific challenges facing ornamentals growers?**

We have achieved that the government see flowers and plants as part of agriculture and thus as an essential sector that must function.

## BAOPN - Bulgaria

*Tatyana Boyadzhieva*

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Mask, Dezinfectants, Distance - 2m

### **How are your sales comparing to the same period last year?**

Much worse

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

No proper mechanisms

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Decrease

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before the crisis?**

Yes, not yet

### **Has your government recognised the specific challenges facing ornamentals growers?**

Not yet

## Canadian Nursery Landscape Association - Canada

Jamie Aalbers

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Curbside pick up, on-line ordering, social distancing in stores, one-way shopping lines through front of store to checkout, cashless payment

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

75% of wages can be covered if your employees continue to work and the farm realises a loss in sales. There is also a 10% wage subsidy on top of this for eligible employees. Business loans of \$40,000 with no interest and \$10,000 forgiven if paid by Dec 2022 an existing support program will cover a proportion of losses too if these losses are greater than 30% of previous year's reference.

### **What longer-term impacts do you expect from this crisis:**

Future tree shortages because there was not enough labour to plant this spring;

### **Has your government recognised the specific challenges facing ornamentals growers?**

They acknowledge it, but have not done much to help with the challenges of lost market sales and increased costs.

### **What lessons have you learned through this crisis?**

Import and export of ornamental plants is the first agricultural product to be sacrificed in an emergency - advocate for government recognition of these crops as agriculture, no exceptions when this is all over. We depend on temporary foreign workers for a large proportion of our labour force, the coronavirus has shown how risky that reliance is. When the borders closed just prior to most seasonal workers arriving, the nursery growers were left without enough labour to get through the spring. Lessen your dependency on temporary seasonal workers.

### **Can you provide an example of a successful business initiative during Covid-19?**

The entire ornamental sector (nursery growers, garden centres, landscapers, and flower growers) came together with a common message to open garden centres and give consumers the opportunity to buy plants and garden. The sector was successful as a whole.

## China Flower Association – China

*Haiyan Kong*

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Take your temperature before entering the store, wear a mask, keep a safe distance in the store, etc

### **How are your sales comparing to the same period last year?**

Much worse

### **Are florist shops open in your country?**

Yes

### **What mechanisms have been provided to support growers?**

Compensation for loss of sales or for crop wastage; Loans;

### **Describe your situation with regards to the support mechanisms in your country**

Under the strong leadership of the central government, the Covid-19 epidemic has been effectively controlled, the government took a series of measures to promote the resumption of production, mainly related to: loan support, production and marketing match-making, logistics support, e-commerce platform support, etc.

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Increase

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before the crisis?**

I don't think it is a matter regarding competition, the import of flowers was mainly impacted by international flight logistics and the measures taken due to Covid-19.

### **Has your government recognised the specific challenges facing ornamentals growers?**

The central and local government took some basic supportive measures for resumption of all industries. In some major flower producing areas, the local government has indeed recognised the specific challenges facing ornamentals growers and took some specific supportive measures.

### **What lessons have you learned through this crisis that could help other countries?**

During the pandemic, the priority for growers is to actively cooperate with national and local governments to take preventive measures, take the impact and loss as short-term case and plan for future recovery and better development.

## Union of Growers and Florists Czech Republic - Czech Republic

*Jiří Horák*

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Observance of hygienic and safety rules: limited number of customers inside the sales area, disinfection of hands and shopping carts, observance of a distance of 2 meters between customers, preference for a payment card.

### **How are your sales comparing to the same period last year?**

Slightly worse

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

For smaller companies, it was possible to obtain payment of part of the salaries for employees. If the employees were parents, they were paid 60-80% of the salary.

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before the crisis?**

It will depend on the number of imported plants and the price.

### **Has your government recognised the specific challenges facing ornamentals growers?**

The government knows about the problems of our sector, we are in daily contact with it and with the Ministry of Agriculture.

### **What lessons have you learned through this crisis that could help other countries?**

Florists and horticulture remained open for almost the entire crisis. For this reason, our damage was less. Therefore, we are optimistic about further developments.

### **Can you provide an example of a successful business initiative during Covid-19 pandemic?**

The association participated in the direct connection of Czech growers and sellers. The Blooms Whole Country campaign was launched to promote sales and beautify the environment with flowers.

## Dansk Gartneri – Denmark

Torben Lippert

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Distance 1m - Disinfectant hand gel - hand wash option and toilet

### **How are your sales comparing to the same period last year?**

Slightly worse

### **Are florist shops open in your country?**

Yes

We have only general support scheme, and they do not fit the sector very well. You need a loss of minimum 35% in order to get compensation. We assume only a limited (less than 5) number of producers are able to full fill the requirements

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Increase

### **Compared to growers Describe your situation with regards to the support mechanisms in your country in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before the crisis?**

In Denmark we will be less competitive as the sector in the Netherlands gets better support schemes.

### **Has your government recognised the specific challenges facing ornamentals growers?**

Yes and done some smaller improvement in the general compensation scheme.

### **What lessons have you learned through this crisis that could help other countries?**

Very few. It was a totally extraordinary situation.

### **Can you provide an example of a successful business initiative during Covid-19 pandemic?**

Ordering flowers and plants via the web and then drive to your garden center and collect without going into the shop. Selling flowers and plants from unmanned spots (outside the shop) and use mobile pay. Very low degree of "cheating" with the payment. We normally do this in selling from the farm.

## AQ Roses PLC – Ethiopia

Frank Ammerlaan

### **Are garden centres open in your country?**

Yes

### **How are your sales comparing to the same period last year?**

Slightly worse

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

Logistics via Ethiopian Airlines is guaranteed. Soft loans are possible for working capital

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before the crisis?**

Depends fully on the market. Growers with stable market in Europe will be stronger due to logistic problems in other countries. Growers focussing on Middle East or Far East are struggling due to lack of logistics. Companies that were not financially strong or well managed will also have problems because of all tensions and turnover-losses. The strong companies will only be stronger or at least stable.

### **Has your government recognised the specific challenges facing ornamentals growers?**

Ethiopian Airlines (gvt company) is committed to keep flying out the products against a normal price level. This is very important for the consistency. In addition, floriculture is marked as essential so companies can keep on operating. There are some possibilities for soft loans. But on the other hand, Ethiopia is a poor country with many challenges. So protection of operation and logistics is the max they can do and that makes sure companies are able to keep on working. Opposite to this is that companies are not allowed to dismiss workers, which can create a burden on companies. So part of the social problems are brought to the companies. In Ethiopia, almost no workers in flower farms have lost their jobs. In my opinion, this consistency has also contributed to fast recovery of many farms as an immediate reaction from companies could be to dismiss many workers. That it is very difficult to start up again, which can be seen in some companies in Kenya

### **What lessons have you learned through this crisis that could help other countries?**

A crisis is a threat but also offers opportunities. So new customers will emerge but it is also clear which customers are not reliable. For Ethiopia very specific: We always are 'forced' to work with Ethiopian Airlines as there is a monopoly. Growers also have not asked or tried to bring other airlines on board.

Another lesson is that companies who have tried to keep their processes going (of course reducing and minimising expenditures where possible but not on essential activities) were also able to take their chances immediately. Whereas companies that were not loyal to their suppliers or workers are still having big problems to start up again and are suffering much more

## VAL'HOR - France

Mikaël Mercier

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Coronavirus safety measures (social distancing and hygiene measures)

### **How are your sales comparing to the same period last year?**

Much worse

### **Are florist shops open in your country?**

Yes

### **What mechanisms have been provided to support growers?**

None

### **Describe your situation with regards to the support mechanisms in your country**

We are negotiating support at national and international level.

### **What longer-term impacts do you expect from this crisis:**

Stock shortages due to supply chain interruption

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Increase

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before the crisis?**

Same

### **Has your government recognised the specific challenges facing ornamentals growers?**

The government accepted some of our demands (selling kitchen garden plants, florists open the 1st of May) but we have not yet received financial support.

### **Which statement do you most agree with?**

Growers will find it hard to survive this crisis

### **What lessons have you learned through this crisis that could help other countries?**

This crisis show how much collective actions are able to help the industry.

## Hungarian Interbranch Organization for Ornamental Horticulture - Hungary

Csikor Julianna

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Use of face mask, frequent disinfection, social distancing (keeping a distance of 1,5-2 m), using bank cards for payment instead of cash.

### **How are your sales comparing to the same period last year?**

Same

### **Are florist shops open in your country?**

Yes

### **What mechanisms have been provided to support growers?**

Pay wages of staff; Loans.

### **Describe your situation with regards to the support mechanisms in your country**

Postponing repayment of loans, reduction of contributions of wages, tax breaks

### **What longer-term impacts do you expect from this crisis:**

Increase in online sales; Stock shortages due to supply chain interruption; Price increase or decrease; More vertical supply chain integration (i.e. less role for middle-men and traders); Greater appreciation of the value of trade associations

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before the crisis?**

Buy local movement - appreciation of domestic products, emphasis on short supply chain and on environmental considerations.

### **Has your government recognised the specific challenges facing ornamentals growers?**

Yes: garden centres were allowed to stay open, and the sector received tax breaks.

### **Which statement do you most agree with?**

Most growers will soon recover from this crisis

### **Which statement do you most agree with?**

A low proportion of growers could go out of business

### **What lessons have you learned through this crisis that could help other countries?**

Products domestically produced help the economy and lower unemployment.

## Iranian Society for Ornamental Plants – Iran

Pejman Azadi

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

All centers are open

### **How are your sales comparing to the same period last year?**

Much worse

### **Are florist shops open in your country?**

Yes

### **What mechanisms have been provided to support growers?**

None

### **Describe your situation with regards to the support mechanisms in your country**

There is still no support for ornamental plant growers. However, we are trying to convince the government to give loans to growers. The only expected support is the loan.

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Decrease

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before the crisis?**

In Iran we have special condition of sanctions, therefore we have a very low level of importation for the last two years. Therefore, mainly exportation to neighborhood countries is decreased.

### **Has your government recognised the specific challenges facing ornamentals growers?**

No

### **Which statement do you most agree with?**

Most growers will soon recover from this crisis

### **What lessons have you learned through this crisis that could help other countries?**

We need to emphasise on healthy effect of ornamental plants and not only decorative.

### **Can you provide an example of a successful business initiative during Covid-19 pandemic?**

Internet-based shops were more successful during the pandemic. Pot plants were more resistant to the crisis compared to cut flowers.

## ANVE - ITALY

Leonardo Capitanio

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

They must guarantee the social distance between people, the use of face mask and they must sanitise the environments, or any other sanitary measures to avoid the spread of the virus.

### **How are your sales comparing to the same period last year?**

Slightly worse

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

Either loans and compensation are formally available, but the intensity of this aid is still not enough, and the procedures need to be clarified and simplified

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Increase

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before the crisis?**

Our industry is mainly composed by little and less structured company. This means they are less organised but more resilient to the business changing.

### **Has your government recognised the specific challenges facing ornamentals growers?**

Yes, thanks to our good relationship, the Minister of Agriculture has recognised our specific challenges, but it must face the enormous need of money. The national budget does not easily allow a such large sum of money for our industry.

### **What lessons have you learned through this crisis that could help other countries?**

We must organise our company as flexible as possible. Being able to change the direction of our strategy as quickly as possible is the most important thing. Moreover, we must change some habits regarding working places and public spaces to protect people from this kind of problem in the future.

### **Can you provide an example of a successful business initiative during COVID-19 pandemic?**

Invest in E-commerce business and smart working are the answer.

## Ota floriculture Auction Co. Ltd – Japan

Ryoji Kato

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

At garden centers, customers must wear masks and wait in the checkout queue with some distance (distance differs depending on how big the center is. but the garden center marks waiting positions with stickers). Due to the "stay-home" request from the government, nursery plants and/or bedding plants are getting very popular for small home balcony gardening, and the centers are often very crowded on weekends. In such cases, the centers execute the admission limit to avoid high density and close contacts among customers.

### **How are your sales comparing to the same period last year?**

Much worse

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

Apart from governmental supports for companies and self-employed in general, the government provides supports targeting agricultural growers (1) to promote the next cultivation period with profitable crops (stop growers from quitting their business), (2) to lend money without loan interest and any collateral mortgages for maintaining their business, (3) to employ alternative employees for agricultural works and subsidize expenses for its recruitment (Japan's agriculture cannot help depending on cheap labor from foreign workers and trainees amid the decreasing number of population and the aging society. After they went back to home countries, it becomes a serious problem that there is no labor force in agricultural fields.). Especially for flower growers, the government (i) leads to promote broadly the purchase of flowers for home-use by "Plenty of flowers" project and (ii) substantially compensates the market loss in the name of "Flower longevity test" project, "Flower display in public places for the promotion of flower consumption" project..

### **What longer-term impacts do you expect from this crisis?**

Demand of flowers for home-use increases, while corporate demand and demand for events increases. Totally, demand is decreasing but this situation can be habituated or routinized even after this crisis.

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before?**

Can be less competitive. Different from flower growers in other countries, there are many growers in Japan who grow special quality of flowers over quality standards. Although prices of those flowers are quite high with limited supply, we can find good demand from flower artists and/or wedding planners. Due to cancellations of events and ceremonies during this crisis, they have a big difficulty to survive.

**Has your government recognised the specific challenges facing ornamentals growers?**

No. Among ornamental growers, the pot phalaenopsis growers are facing difficulties most. It has (had) been a custom to send exclusive-quality pot phalaenopsis as a gift between each company. But during this crisis, such social activities cannot be found. The market price of the pot phalaenopsis is far below the grower's reproduction cost. The government might recognize the situation, but it seems a bit difficult to support pot flower/plant growers comparing with cut flower growers because pot flower/plant can live longer and cannot be easily distructed like cut flowers.

**Which statement do you most agree with?**

Growers will find it hard to survive this crisis

**Which statement do you most agree with?**

A low proportion of growers could go out of business

**What lessons have you learned through this crisis that could help other countries?**

What we saw for Mother's Day, the literacy of ICT makes the big difference between "win" and "lose" among flower retailers. One with EC site got +300% number of orders comparing with last year, and another got little number. That was because people had to stay home and could not go out to visit their mothers, but the difference of the literacy will be the key after people learned convenience.

**Can you provide an example of a successful business initiative during COVID-19 pandemic?**

I cannot say if it is being successful businesswise or not, but I can find a new sales channel from event planners to consumers through direct EC channel with remaining flowers after cancellations of events (especially weddings) and can also find a new method of sales like "drive-through" flower shop, which is oriented to avoid people's contacts but getting popular because it is convenient for consumers.

## VBN – the Netherlands

George Franke

### **Are garden centres open in your country?**

Yes

### **How are your sales comparing to the same period last year?**

Slightly worse

### **Are florist shops open in your country?**

Yes

### **What mechanisms have been provided to support growers?**

Compensation for loss of sales or for crop wastage; Pay wages of staff.

### **Describe your situation with regards to the support mechanisms in your country**

1. Companies with at least a 30% loss of turnover in the period from 12 March to 12 June can receive a compensation of 70%. The first 30% of the drop in turnover is considered entrepreneurial risk. So, a company can get maximum 49%. Maximum compensation is 1 million Euro.

2. Companies with at least a 20% loss of turnover for 3 months can receive a compensation of a maximum of 90% of the wage bill in proportion to the fall in turnover.

A company can only receive one of the two compensation mechanisms.

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Decrease

### **Has your government recognised the specific challenges facing ornamentals growers?**

Yes, for the first time in the history an emergency fund for ornamental growers has been set up by the government.

### **Which statement do you most agree with?**

Growers will find it hard to survive this crisis

### **What lessons have you learned through this crisis that could help other countries?**

Flexibility and creativity are important aspects in such a crisis. Be on the agenda of your government.

### **Can you provide an example of a successful business initiative during COVID-19 pandemic?**

Many online initiatives. It is questionable if all those initiatives will be successful in the future.

## NZ Plant Producers Inc - New Zealand

Matthew Dolan

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Contact tracing

2-meter spacing between customers. Hygiene measures (cleaning, etc)

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

There is a good level of support from Govt for businesses including: wage subsidies, loans up to \$100k, and tax relief

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Increase

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than?**

N/A. NZ does not import plants. I will not answer for flowers.

### **Has your government recognised the specific challenges facing ornamentals growers?**

Yes. Garden retailers and plant producers were given specific allowances to continue to operate during NZ's 4-week lockdown. Other large sectors, like forestry, were not given the same recognition. There is a great appreciation for the physical and mental wellbeing benefits of gardening & greenlife

### **Which statement do you most agree with?**

Most growers will soon recover from this crisis

### **Which statement do you most agree with?**

A low proportion of growers could go out of business

### **What lessons have you learned through this crisis that could help other countries?**

Work closely with govt to find solutions. Build these relationships in peacetime. Be open to other aligned sectors, like, primary industry assns.

### **Can you provide an example of a successful business initiative during Covid-19 pandemic?**

An increase in spatial tools and apps to track staff.

## Polish Nurserymen Association - Poland

Grzegorz Falkowski

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Standard measures - masks, keeping distance

### **How are your sales comparing to the same period last year?**

Better

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

Exemption of micro companies and self-employed from employee social security contributions for a period of three months, loan for companies in the amount of 5,000 PLN (1,100 Euro), extension of the period for submitting tax declarations, for companies in trouble co-financing of employee salaries up to 40% average monthly salary and making working time more flexible.

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Increase

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before?**

Support from national governments to growers may influence competitiveness in European common market, growers are afraid of competitiveness disturbance because of uneven help.

### **Has your government recognised the specific challenges facing ornamentals growers?**

Yes

### **Which statement do you most agree with?**

Most growers will soon recover from this crisis

### **Which statement do you most agree with?**

A low proportion of growers could go out of business

## SA Nursery Association - South Africa

Gerdie Olivier

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Social distancing, hand sanitiser stations, limited number of customers in store, daily monitoring of staff, use of face masks, sanitising of tills and pay points, risk assessment plan had to be drawn up and adhered to.

### **How are your sales comparing to the same period last year?**

Better. If you look at our year to date (March to Mid-May) figures, trading is currently tracking down to last year as we lost 5 weeks of trade. You need to consider that most garden centres only opened during the first 10 days of May, some stores only traded after the 9 May. If you take stats from the exact days, they were open, most retailers are showing a growth.

### **Describe your situation with regards to the support mechanisms in your country**

Tax support measures have been put in place by government including a Debt Relief Financial Scheme and deferred payments on provisional tax liability. A temporary employer relief scheme was created to assist employers in paying employees' salaries. Debt Relief Financial Scheme set by up government. Financial institutions are giving various forms of financial support

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before?**

We do not have a lot of competition with imported plants and local growers supply 99% of the stock in nurseries. We do foresee a shortage of plants in mid-season as a lot of plants are grown from cuttings supplied from Europe

### **Has your government recognised the specific challenges facing ornamentals growers?**

No. Our industry is a small sector of agriculture and although garden centres may trade again, the regulations have not been updated and some authorities don't recognise our garden centres as agriculture, so have instructed them to close and florists have a similar problem. Nurseries and garden centres have only been allowed to open from 1 May.

### **What lessons have you learned through this crisis that could help other countries?**

As an organisation, you need to have strong ties with government to ensure they recognise ornamental horticulture as an industry and understand our industry.

### **Can you provide an example of a successful business initiative during COVID-19 pandemic?**

Whilst nurseries were not allowed to open and only food production companies (essential services) could trade, some seedling growers focused on the growing and selling of vegetable seedlings.

## Korean Association for the Advancement of Flora Culture - South Korea

Hongkyun An

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

At a government level, there was a recommended guideline for social distancing to all citizens and businesses, but not particularly for the horticulture-related businesses.

It is recommended that all business must: place sanitizer on-site, check temperature twice a day, keep at least 1m distance between the employees, and encourage employees to take the day off when having a presumptive symptom.

### **How are your sales comparing to the same period last year?**

Much worse

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

A majority of growers are devastated due to the huge sale drop in the spring.

- The central government offers loans to the growers with temporarily lowered interest.
- The local governments held various events or campaigns to promote flower consumption.

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Decrease

### **Has your government recognised the specific challenges facing ornamentals growers?**

Yes, both central and local governments held flower consumption events and provided some aids to the growers. However, newly launched programs are often unsustainable and inadequate to recover the damage.

### **Which statement do you most agree with?**

Most growers will soon recover from this crisis

### **Which statement do you most agree with?**

A low proportion of growers could go out of business

### **Can you provide an example of a successful business initiative during Covid-19 pandemic?**

Not a business initiative, but I must mention one notable comment about how the demands shifted during the pandemic. In most years, demands in cut flowers are high in spring, but due to the pandemic, indoor plants and pot plant consumption had much more increased.

## Floramedia Spain – Spain

Rafa Brines

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Garden centers are opened only in some regions by now. Preview appointment is required

### **How are your sales comparing to the same period last year?**

Slightly worse

### **Are florist shops open in your country?**

Yes

### **What mechanisms have been provided to support growers?**

Loans

### **Describe your situation with regards to the support mechanisms in your country**

Loans provided by Central Government

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Increase

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before?**

Same as ever

### **Has your government recognised the specific challenges facing ornamentals growers?**

No

## JardinSuisse – Switzerland

Josef Poffet

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Open since 27 April 2020. There must be a concept: 2 m distance between customers, a maximum of people per m<sup>2</sup> (1 person per 10m<sup>2</sup> including the salesperson), a shield between customer and salesperson at the paying station, one-way systems for customer flow. At the entrance there is a supply of disinfectant for hands and trolleys

### **How are your sales comparing to the same period last year?**

Slightly worse

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

One very important point is, that businesses were differently affected, depending on size and region. Large producers and garden centres tended to be more affected.

The companies have taken note of the plants they had to throw away, but it is not yet clear whether they will receive a compensation. The loans have a limit of CHF 500'000 and the credit approval was given by the bank (they know the status of the company) the federal government guarantees the loan.

### **What longer-term impacts do you expect from this crisis?**

A lot of Swiss people, also young people, have started to work with plants and gardens during the crisis, is this a chance for the future?

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before?**

Swiss goods are more appreciated by customers.

### **Has your government recognised the specific challenges facing ornamentals growers?**

Yes, we had good connections to the government and the responsible people in different positions. they understood and had good will for our problems.

### **What lessons have you learned through this crisis that could help other countries?**

The government has introduced that a company can register short-time work (=compensation) for single departments. This helps a lot.

### **Can you provide an example of a successful business initiative during Covid-19 pandemic?**

Many shops have offered delivery and collection services from 17 March to 27 April. One problem that occurred was, that the online systems were used extensively which caused a lot of problems. Shutdowns of systems and delivery capacity greatly exceeded.

## TFDA – Chinese Taipei

Kevin Chung

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Measure body temperature before entry, wear mask, keep 1.5 meters distance from others.

### **How are your sales comparing to the same period last year?**

Slightly worse

### **Are florist shops open in your country?**

Yes

### **Describe your situation with regards to the support mechanisms in your country**

Project of provide financial relief and reengage the industry from the Council of Agriculture: low interest loan, government paid the transaction fee of flower auction market for growers, use flowers to decorate hospitals and many interesting places, given flowers to 5000 pharmacies, cooperate with supermarkets to sale flowers, media interview to promote flowers, cooperate with websale business companies...etc.

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Same

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before?**

More

### **Has your government recognised the specific challenges facing ornamentals growers?**

Yes

### **Which statement do you most agree with?**

Most growers will soon recover from this crisis

### **Which statement do you most agree with?**

Very few growers will go out of business

### **What lessons have you learned through this crisis that could help other countries?**

Transparent information prevents damages in advance and is more important than recovering.

### **Can you provide an example of a successful business initiative during Covid-19 pandemic?**

As many promotion activities in the media caused the flower price to go high before Mother's Day.

## Turkish Ornamental Plants Exporters Association – Turkey

Ismail Yilmaz

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

They control customers fever in entrance, workers wear special protective clothes and masks, customers must wear masks.

### **How are your sales comparing to the same period last year?**

Much worse

### **Are florist shops open in your country?**

Yes

### **What mechanisms have been provided to support growers?**

None

### **Describe your situation with regards to the support mechanisms in your country**

Very bad situation no support at all,

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Decrease

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before?**

Costs of transport can be used as an advantage to Europe if the cost in other countries increase much more.

### **Has your government recognised the specific challenges facing ornamentals growers?**

We try to inform the government always, but couldn't get a result

### **Which statement do you most agree with?**

Growers will find it hard to survive this crisis

### **Which statement do you most agree with?**

A low proportion of growers could go out of business

## Uganda Flowers Exporters Association – Uganda

Esther Nekambi

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

3 cargo flights out of Entebbe weekly, Set up safety measures at the work place in line with government SOPs

### **How are your sales comparing to the same period last year?**

Slightly worse

### **Are florist shops open in your country?**

No

### **What mechanisms have been provided to support growers?**

None

### **Describe your situation with regards to the support mechanisms in your country**

No compensation done to the growers.

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Decrease

### **Has your government recognised the specific challenges facing ornamentals growers?**

Yes, government is now aware of the closure of the export market; causing 50-70% reduction in export sales and the risk of direct job losses to 10,000 people and indirect loss to another 60,000.

### **Which statement do you most agree with?**

Most growers will soon recover from this crisis

### **Which statement do you most agree with?**

Very few growers will go out of business

### **What lessons have you learned through this crisis that could help other countries?**

Increased need for direct sales and online sales outlets as opposed to reliance on the auction house. Setting up temporary camps at the workplaces for continued operations during country lock down.

### **Can you provide an example of a successful business initiative during Covid-19 pandemic?**

Lobbied government for continuation of cargo flights despite lock down so as not to kill the export sector in the middle of the pandemic.

## AmericanHort – the United States of America

Craig Regelbrugge

### **Are garden centres open in your country?**

Yes

### **If yes, what measures are in place for customers?**

Varies state by state. Most are open, and asked to enforce social distancing. Some have been restricted to curbside pickup or delivery, but most states are now relaxing such restrictions. One or a few states still have closure orders in place.

### **How are your sales comparing to the same period last year?**

Slightly worse

### **Are florist shops open in your country?**

No

### **Describe your situation with regards to the support mechanisms in your country**

Our Congress has passed several relief bills that have included forgivable loans to businesses that retain workers on payroll; and, emergency loans that must be repaid. US Department of Agriculture is providing direct payments to compensate for losses to eligible producers. Nursery and floriculture growers are not yet covered under the program but are expected to be.

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before?**

Perhaps slightly more, to the extent that global supply chains are slower to resolve than domestic.

### **Has your government recognised the specific challenges facing ornamentals growers?**

Yes, but the extreme diversity in our industry, coupled with the lack of traditional commodity markets associated with other crops, have vexed government agencies. We have had to battle the perception that our crops are "non-essential."

### **What lessons have you learned through this crisis that could help other countries?**

Not really a new lesson, but an affirmation - with many impactful decisions in the US being made at the state level, states where the industry is organized, politically active, with key decision maker relationships established, generally fared somewhat better than those unwilling or unable

### **Can you provide an example of a successful business initiative during Covid-19 pandemic?**

From an association perspective, we very nimbly launched a webinar series with subject matter experts who were able to unpack the emergency relief programs and help our industry to make the most of them. In the time of crisis, we opted to open these up to the broader industry rather than just members. We often had roughly 1,000 participants on a single webinar.

## Goromonzi Estate Flowers - Zimbabwe

Gorden Makoni

### **Are garden centres open in your country?**

No. As they are non-essential services

### **How are your sales comparing to the same period last year?**

Much worse

### **Are florist shops open in your country?**

No

### **What mechanisms have been provided to support growers?**

None

### **Describe your situation with regards to the support mechanisms in your country**

There is no support, most of the national stimulus fund is going towards strategic crops like maize and wheat as flowers are nonessential

### **How do you expect consumer demand to be affected in the coming weeks, compared to the same period last year?**

Decrease

### **Compared to growers in other countries do you feel growers in your country will be more or less competitive (against imported plants/flowers) than before?**

Might get worst in terms of freight costs as the prices has shot up by 100 percent. We are still waiting on stimulus from Europe but flowers might be viewed as non essential especially fresh cut flowers unless trade associations gets involved. For ornamental plants, that could see a spike in demand.

### **Has your government recognised the specific challenges facing ornamentals growers?**

Not at the moment