

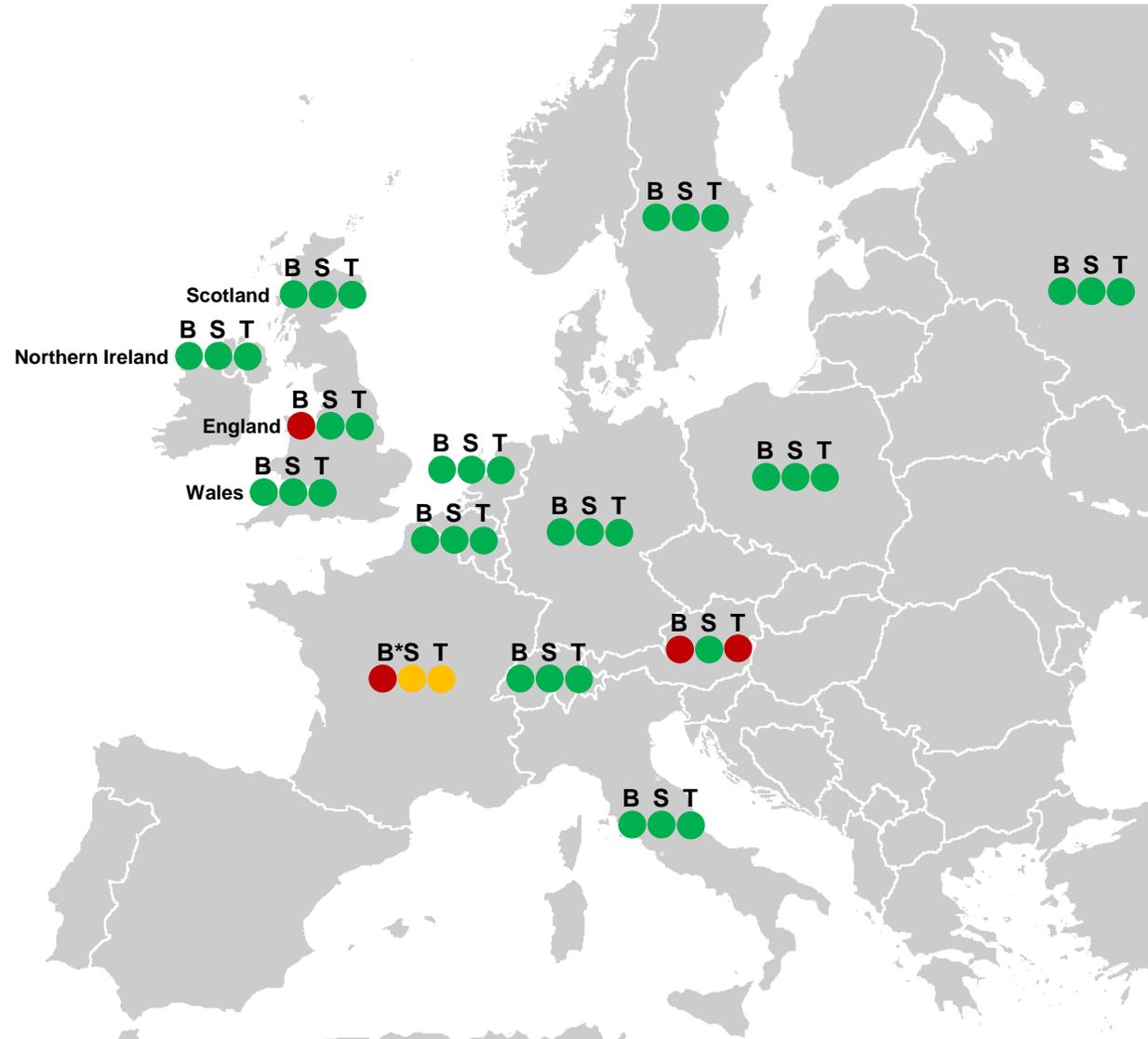
International market developments

The main market developments of 16 November 2020

16 November 2020
Royal FloraHolland

This report contains information as known on Monday 16 November 09.00. Although this report has been compiled with the greatest care, it is possible that the current situation in a particular country or region is no different from that shown here. No rights can be derived from this report.

Flower and plant sales by country Europe

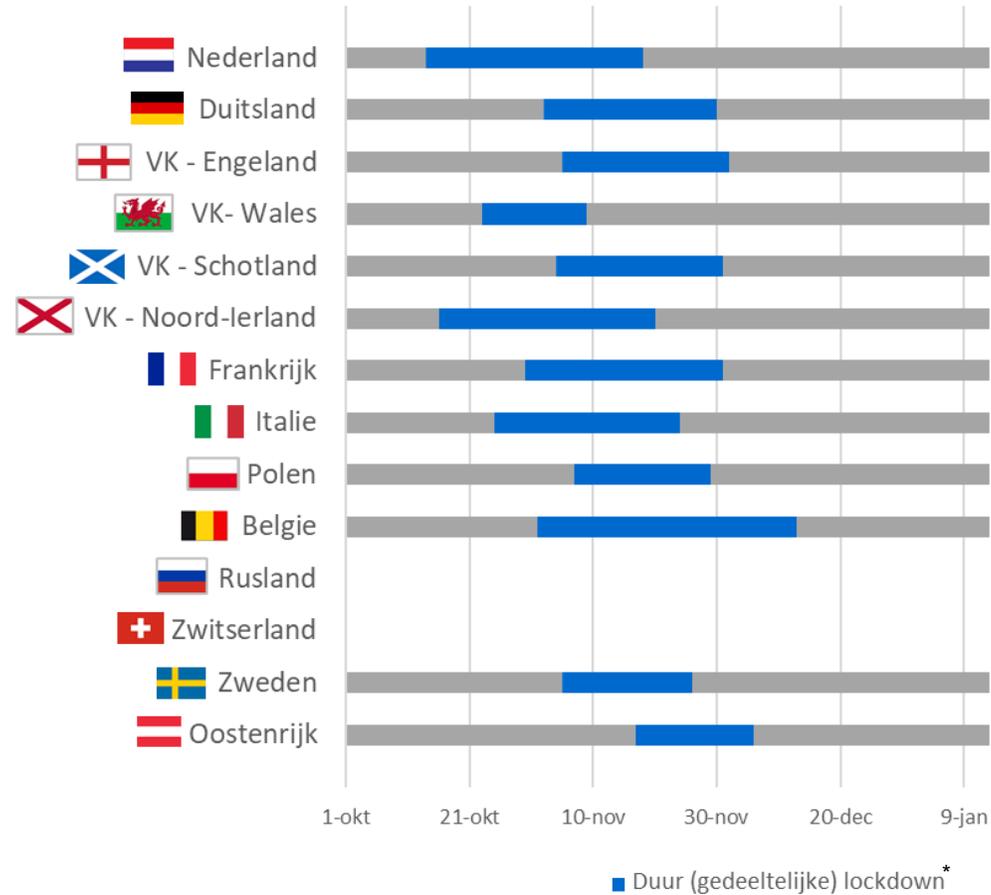


Legend

- B : Florist
- S : Supermarket
- T : Garden centre
- No sale
- Limited sales
- Free sale

Up-to-date information on transport in Europe: <https://www.tln.nl/coronavirus-en-landeninformatie/>

Duration (partial) lockdown per country



* Definition and interpretation of the term 'lockdown' differs per country. We use the communication of the country in question as the guiding principle.

Lock down

- Partly

Horticulture plant sales points

- Florist: Open
- Supermarket: Open
- Garden centre: Open

Important articles/information

- Over the last seven days, the number of infections fell by an average of 191 per day. This reduction started at the end of October, two weeks after the Cabinet announced a partial lockdown. On top of this last week, zoos, cinemas and museums, among other things, were closed and the maximum group sizes were further reduced. Next week, the Cabinet will decide whether these measures can be lifted again. The question is whether that will happen. After all, the downward trend seems to have reversed over the past three days. After the number of positive tests on Sunday and Monday fell sharply, by almost 1000 per day, there was only a very slight fall on Tuesday (-14). Today's day total (5,658) is almost a thousand higher than then. (*Source: AD, 12-11-2020*)

Share of Dutch exports (Source: Floridata)

- Flowers: 27%
- Plants: 26%

Lock down

- Status 3 November 2020: Partly, not aimed at retail but at restricting leisure time and contacts there. In some Länder, additional measures on top of federal measures. These are more focused on contact professions, e.g. the rules are mainly aimed at restricting contact in leisure time. For example, cinemas, bars and swimming pools are closed for a month. Also, no major events may take place and no public is allowed at sports events. Furthermore, public buildings are closed. All this can have an impact on the floriculture sector, especially in terms of products for events and on the location of the closed companies and institutions. Most infections in North Rhine-Westphalia, Baden-Württemberg and Bavaria. Government comes up with a new support package for businesses.

Horticulture plant sales points

- Florist: Open
- Supermarket: Open
- Garden centre: Open

Important articles/information

- Frequently asked questions about the coronavirus in Germany (Source: RVO): <https://www.rvo.nl/onderwerpen/internationaal-ondernemen/landenoverzicht/duitsland/veelgestelde-vragen-over-het-coronavirus-duitsland>. Here you can find an overview of the federal and regional measures. There is a reference to the corona virus pages of the Länder concerned on which the regulations are displayed. For the time being, federal measures, list of closed companies and institutions as well as different rules for contact professions.

Share of Dutch exports (Source: Floridata)

- Flowers: 16%
- Plants: 10%

Lockdown

- England: Lockdown from 5 November to 2 December
- Wales: End of Firebreak Lockdown on 9 November; COVID measures tightened up.
- Scotland: As of 2 November there will be a division of regions into 5 security levels with associated measures. 22 of the 32 regions are at level 3, the rest below. At Level 4, only essential shops will be allowed to open.
- Northern Ireland: Circuit Breaker Lockdown: tightened COVID measures from 16 October to 20 November.

Horticulture plant sales points

- Florist:
 - England: Close
 - Wales: Open
 - Scotland: Open
 - Northern Ireland: Open
- Supermarket:
 - England: Open
 - Wales: Open
 - Scotland: Open
 - Northern Ireland: Open
- Garden centre:
 - England: Open
 - Wales: Open
 - Scotland: Open
 - Northern Ireland: Open

United Kingdom (cont'd)

Important articles/information

- 9 November 2020 marks the **end of** the Fireback lockdown in **Wales**. People no longer need to stay indoors, pubs, restaurants, hotels, hairdressers and non-essential shops are allowed to reopen. People will also be allowed to travel within Wales again and two households will be allowed to form a bubble. However, a new set of measures has been announced that limits the number of people who can meet outside (max. 30) and inside (max. 15) for organised activities and reopen schools. Non essential travel to and from England is still not possible. (Source: *BBC.UK 09-11-2020* <https://www.bbc.com/news/uk-wales-54843624>)
- In connection with the outbreak of a mutant coronavirus strain of mink in Denmark and fears of animal-to-human contamination, the UK Government has banned the movement of people from Denmark to the **UK of** non-British citizens, including lorry drivers. British citizens (including lorry drivers) are still allowed into the country, but must be in self-quarantine for 14 days after arrival. (Source: LAN Corona overview 12 November)
- The strengthened measures of the circuit breaker lockdown in **Northern Ireland will** end on Friday 13 November. The following measures have not yet been announced. (Source: *Agricultural Attaché Network Ministry of Agriculture, LNV, 12-11-2020*)

Share of Dutch exports (*Source: Floridata*):

- Flowers: 13%
- Plants: 13%

Lockdown

- From 30/10/2020 (and lasts 4 weeks until 1 December)

Horticulture plant sales points

- Florist: closed from 2 November (click & collect allowed)
- Supermarket: open: from 2 November onwards, the sale of flowers (plants are not mentioned in the decree) in retail smaller than 400 m² is allowed and over 400 m² is not.
- Garden centre: from 4 November, the shop of a garden centre with flowers & decorative items must be closed to the public. However, the sale of plants (indoors and outdoors) in the shop to the public may remain open. The sale of plants to professionals may remain open. All products can be sold to the public via 'click & collect'

Important articles/information

- The French Government has ruled that flowers are not essential products. That is why florists have been closed since last Sunday, 1 November, as well as the floristry departments of all garden centres, DIY stores and supermarkets. However, garden centres remain open for the sale of outdoor plants, indoor plants, seeds, fertilisers, phytosanitary products, potting soil and garden equipment. (*Source: Agricultural Attaché Network Ministry of Agriculture, LNV, 05-11-2020*)

Important articles/information (continued)

According to the official texts issued by the French Government on 3 November, the following rules apply:

1. Sale in shops selling flowers and decorative items is prohibited in French supermarkets and shops over 400 m² in size.
2. The ban entered into force on 3 November by decision of the public authorities, with a lead time until 4 November for implementation.
3. This temporary measure will be assessed by the French Government within 15 days.
4. Florists must close shops to the public from 2 November: in-store sales are not allowed, but sales can continue via 'click & collect' systems.
5. Online sale of flowers and plants: no restrictions.
6. Wholesalers can continue to operate.
7. The sale of flowers and plants to the public is possible via 'click & collect' systems by all retail and retail outlets in France (florist shops, supermarkets, garden centres, etc.).

(Source: Union Fleurs, 04-11-2020)

- Recommendations issued by the French Federation of Garden Centres & Pet Stores (Jardineries & Animaleries de France) in a press release:
 - Sale of flowers & decoration articles in garden centres: closed to the public from today 4 November.
 - Sale of plants (indoors and outdoors) in the shop to the public: may remain open.
 - Sale of plants to professionals: can remain open.
 - All products can be sold to the public via 'click & collect'.

(Source: Union Fleurs, 04-11-2020)

- At the Novafleur fair in Tours 2020, Alain Griset, Minister for SMEs, pointed out during a lecture that French florists can benefit from the support plan drawn up for the events sector. *(Source: JAF-info, 09-11-2020)*
- The closure of small businesses is still a hot topic for the executive in France. Votes are rising from both left and right to defend the reopening of these shops, to the point where the elected representatives of the majority will start to worry. The signals first came from the bookshops, and have spread to all the companies that have had to close down. At the same time, the supermarkets are allowed to remain open. In a few days' time, the issue of small shops will take centre stage. There are voices from left and right everywhere to defend the reopening of these shops. *(Source: Le Monde.fr, 12-11-2020)*

Share of Dutch exports (*Source: Floridata*)

- Flowers: 4%
- Plants: 7%

Lockdown

- From 25/10/2020 (and for the time being until 24 November)

Horticulture plant sales points

- Florist: Open during the week; also depending on regional measures that may be in force, which is determined by the colour in which a region is classified (yellow, orange, red) with further restrictions for the orange and red zones (*).
- Supermarket: Open
- Garden Centre: Open during the week; also subject to regional measures that may be in force, which is determined by the colour in which a region is classified (yellow, orange, red) with further restrictions for the orange and red zones (*).

(*) is subject to further verification

Important articles/information

- In Italy, measures have been further strengthened. Shopping centres must keep their doors closed at weekends and on public and pre-public holidays, except for a number of categories of shops within these centres, including supermarkets. In addition, regional measures will apply depending on the colour of a region (yellow, orange, red) with further restrictions for the orange and red zones. Sale of food products (retail outlets, supermarkets) will continue to be guaranteed. (*Source: Agricultural Attaché Network Ministry of Agriculture, LNV, 05-11-2020*)



Poland

Share of Dutch exports *(Source: Floridata)*

- Flowers: 4%
 - Plants: 5%
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Lockdown

- Partly. Measures will last until 29 November.

Horticulture plant sales points

- Florist: Open
- Supermarket: Open. Additional restrictive measures will apply in Poland from Saturday 7 November. The measures include: closure of shopping centres **except supermarkets** and other necessary facilities, shops outside shopping centres will remain open but with sanitary restrictions.
- Garden centre: Open

Important articles/information

- None

Share of Dutch exports (Source: Floridata)

- Flowers: 3%
- Plants: 6%

Lockdown

- From 01/11/2020 (and lasts 4 to 6 weeks)

Horticulture plant sales points

- Florist: Open
- Supermarket: Open
- Garden centre: open

Important articles/information

- The Ministerial Decree published on Sunday morning 1 November confirms that, in addition to a number of other shops, garden centres, nurseries, flower and plant shops are among the essential shops that can remain open to the public. They will therefore remain open. All other non-essential shops must close until 13 December. An evaluation will follow at the end of November. (Source: AVBS, 05-11-2020)
- Support for webshops and home sales: although points of sale of flowers and plants remain open, it is not inconceivable that the demand for online sales of flowers and plants will increase again. Home sales may also gain in importance during this period. For both sales channels, VLAM focuses on promotion via green vanbijons and right-of-way shopkeepers. VLAM will promote groenvanbijons.be as a search platform for consumers in the coming period. Do you sell flowers and plants online? Then be sure to register with VLAM so that your point of sale will be added as a webshop on the platform groenvanbijons.be. You can easily sign up by sending an email to info@groenvanbijons.be, stating the name of the company, municipality and delivery of flowers or outdoor plants. The Steunpunt Korte Keten offers personal advice and guidance to farmers, ornamental growers and growers who want to start or expand sales in the short chain. For concrete questions about this, you can contact the AVBS secretariat or directly with Steunpunt Korte Keten via Tineke D'Hondt (tdhondt@samenferm.be). VLAM also supports the short chain story via the website rechtvanbijdeboer.be. Ornamental growers who see added value in this can contact VLAM via info@rechtvanbijdeboer.be. (Source: AVBS, 09-11-2020)



Russia

Share of Dutch exports (Source: Floridata)

- Flowers: 4%
- Plants: 2%

Lockdown

- None. There are, however, restrictions on Moscow.

Horticulture plant sales points

- Florist: Open
- Supermarket: Open
- Garden centre: Open

Important articles/information

- Moscow has recently seen a significant increase in the number of corona infections and expects the situation to deteriorate in the coming weeks. From 13 November to 15 January, there are many restrictions in place. (Source: *Agricultural Attaché Network (LAN)*, 12-11-2020).
- Moscow orders all cafes, restaurants, clubs and other nightlife venues to close their doors between 11 p.m. and 6 a.m. in order to slow down the spread of the coronavirus. Students from universities and colleges in Moscow are now receiving distance education (Source: *Moscow Times*, 12-11-2020).

Share of Dutch exports (*Source: Floridata*)

- Flowers: 3%
 - Plants: 4%
-

Lockdown

- Strengthened national COVID measures from 29 October 2020. Cantons - where necessary - take additional measures.

Horticulture plant sales points

- Florist: Open
- Supermarket: Open
- Garden centre: Open

Important articles/information

- In canton Geneva (in view of the COVID situation) additional measures apply over and above national measures. Bars, restaurants and non-essential shops are closed. Supermarkets, florists, DIY shops and garden centres, among others, remain open. (*Source: website canton of Geneva, 01-11-2020*)

Share of Dutch exports (Source: Floridata)

- Flowers: 2%
- Plants: 4%

Lockdown

- 5 November 2011, No, not nationwide, regions can establish regional full lockdown in case of high growth in infections, but not as yet comparable partial lockdown as in Germany in a total of 21 regions including Jönköping County, Halland County and Örebro County.
- Kronoberg, Södermanland County, Stockholm, Västra Götaland and Östergötlan, Skåne. Shops are open, but it is not recommended to visit them as a leisure activity, only for necessary shopping. In this context, Sweden continues to steer on the people's own responsibility and does not force them to do so.
- In order to limit the effects of the spread of Covid-19, there is a temporary ban on entry into the EU via Sweden.
The government has decided to extend the entry ban until 22 December 2020. From 10 November, travel to Sweden from NL code orange will be banned.

Horticulture plant sales points

- Florist: Open
- Supermarket: Open
- Garden centre: Open

Important articles/information

- List of measures in force: <https://www.rvo.nl/onderwerpen/internationaal-ondernemen/landenoverzicht/zweden/veelgestelde-vragen-over-het-coronavirus-zweden> (Last update: 11-11-2020)
- English-language official website with corona measures and national and regional news: <https://www.krisinformation.se/en/hazards-and-risks/disasters-and-incidents/2020/official-information-on-the-new-coronavirus>
- Analysis of what needs to be done to achieve a national lockdown. Not yet discussed: <https://www.thelocal.se/20201106/is-sweden-heading-for-a-national-lockdown>.

Share of Dutch exports (Source: Floridata)

- Flowers: 2%
- Plants: 3%

Lockdown

- Lockdown
- Among others, non-essential shops will be closed from 17 November to 6 December 2020
- From 17 November onwards, the whole day must be kept inside as much as possible (exceptions will be made); this applies provisionally until 26 November 2020.

Horticulture plant sales points

- Florist: Closed
- Supermarket: Open (until 19:00 at the latest)
- Garden centre: Closed

Important articles

- -



Kenya

Share of Dutch imports *(Source: UN Comtrade)*

- Flowers: about 27%
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Lockdown

- There are no new developments. We are monitoring the situation very closely.

Impact of staff deployment

- -

Road transport

- -

Air transport

- -

Important articles/information

- -

Share of Dutch imports *(Source: UN Comtrade)*

- Flowers: about 7%
 - Plants: about 1%
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Lockdown

- There are no new developments. We are monitoring the situation very closely.

Impact of staff deployment

- -

Road transport

- -

Air transport

- -

Important articles/information

- -



Israel

Share of Dutch imports *(Source: UN Comtrade)*

- Flowers: approximately 0.4%
 - Plants: approximately 0.6%
-

Lockdown

- From 19-9-2020 to 1-12-2020.
- Non-essential shops closed

Impact of staff deployment

- -

Road transport

- -

Air transport

- -

Important articles/information

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