

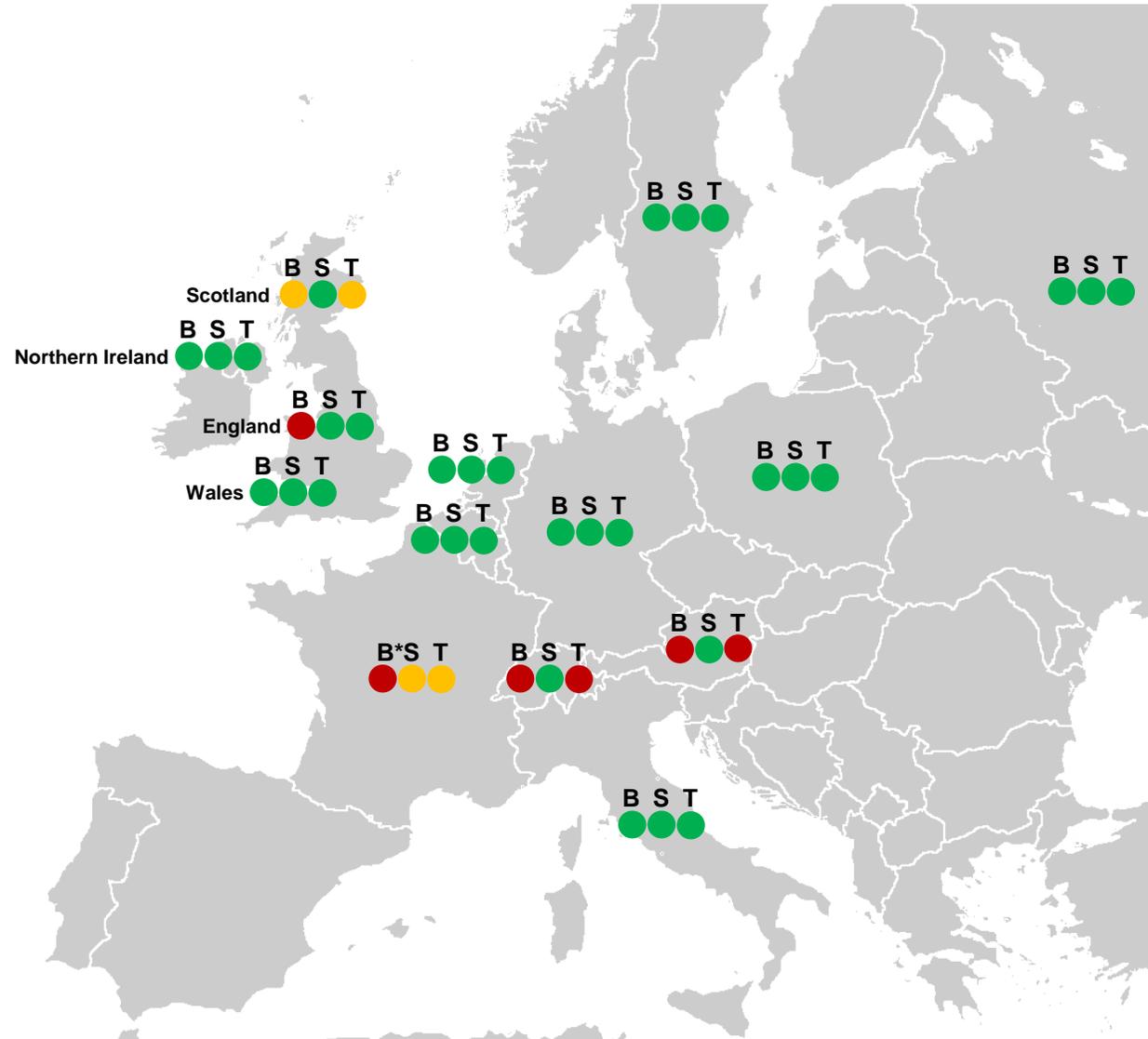
# International market developments

The main market developments as of 23rd November 2020

23rd November 2020  
Royal FloraHolland

This report contains information as known on Monday 23 November 10.00h. 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

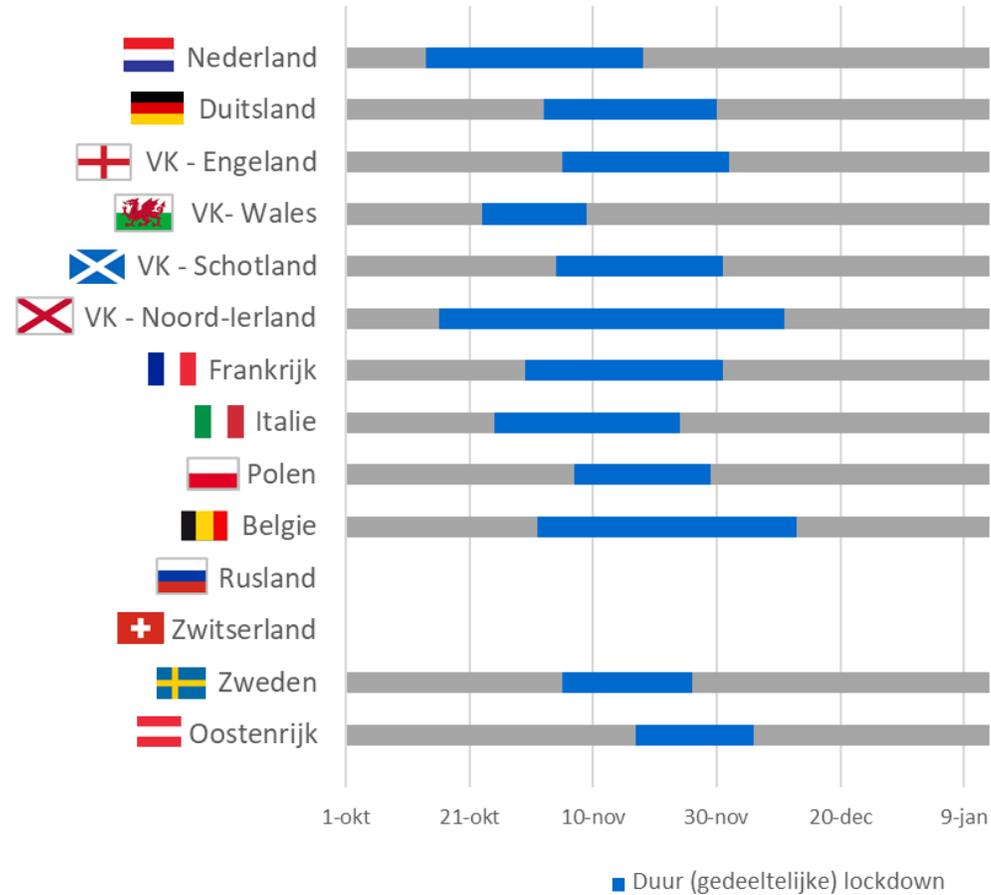


## Legend

- B : Florists
- S : Supermarkets
- T : Garden centres
- No sale
- Limited sales
- Free sale

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

# Duration of (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.

## Lockdown status

- Partial

## Ornamental plant sales points

- Florists: Open
- Supermarkets: Open
- Garden centres: Open

## Important articles/information

- The corona virus measures that came into force a fortnight ago will expire on Wednesday night 18 November. We will then return to last month's partial lockdown, which will remain in place for the time being. Good news for museums, theatres, libraries, casinos, swimming pools and amusement parks. They can reopen after a two-week closure. We are also allowed to take group lessons at the gym again (up to 30 people and with a distance of 1.5 meters). A maximum of three people per day from Wednesday night 18 November onwards may be received at home and a maximum of four people may be outside in a group. Shops in the retail trade will close at 20.00 at the latest. Shops selling mainly food may remain open later. *(Source: AD, 17-11-2020)*



# Germany

## Share of Dutch exports (Source: Floridata)

- Flowers: 27%
- Plants: 26%

## Lockdown status

- As of 3rd November, there is a partial lockdown in place, not aimed at retail but at restricting leisure time and contacts there. In some states there are additional measures on top of federal measures. These are more focused on contact professions, e.g. the rules are mainly aimed at restricting contact during 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 are located in North Rhine-Westphalia, Baden-Württemberg and Bavaria. The Government has come up with a new support package for businesses.

## Ornamental plant sales points

- Florists: Open
- Supermarkets: Open
- Garden centres: 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 states concerned on which the regulations are displayed. For the time being, federal measures, a list of closed companies and institutions as well as different rules for contact professions, are continuing.

## Share of Dutch exports (Source: Floridata)

- Flowers: 16%
- Plants: 10%

## Lockdown status

- England: Lockdown from 5th November to 2nd December
- Wales: End of Firebreak Lockdown on 9<sup>th</sup> November; COVID measures tightened up.
- Scotland: Partial lockdown from 20th November, 11 regions will move to level 4 (**highest level**): until 11th December, only essential shops and outdoor retail will be allowed to open. 9 out of 32 regions are on level 3; the rest are below.
- Northern Ireland: Circuit Breaker Lockdown from 16th October to 26th November. However, there will be some relaxations from 20th November. There will be new lockdown measures from 27th November to 11th December.

## Ornamental plant sales points

- Florists:
  - England: Closed
  - Wales: Open
  - Scotland: Closed in 11 regions except outdoor retail and outdoor markets
  - Northern Ireland: Closed from 27th November (except corner shops)
- Supermarkets:
  - England: Open
  - Wales: Open
  - Scotland: Open
  - Northern Ireland: Open
- Garden centres:
  - England: Open
  - Wales: Open



Scotland: In 11 regions, only outdoor garden centres are allowed to open.  
Northern Ireland: Open

# United Kingdom (cont'd)

---

## Important articles/information

- As of 11th November, 11 regions in **Scotland** will go to the highest level of security. Only essential shops will be allowed to open, along with outdoor retail, such as garden centres and outdoor markets. Click & Collect and online services will continue. Other restrictions include travel restrictions outside the region and restaurants and pubs will be closed. The following regions are shifting to the highest level: East Ayrshire, East Dunbartonshire, East Renfrewshire, Glasgow, North Lanarkshire, Renfrewshire, South Ayrshire, South Lanarkshire, Stirling, West Dunbartonshire, West Lothian. (Source: *BBC 18-11-2020*)
- In **Northern Ireland**, contact professions, cafés and coffee shops may reopen from 20th November, but restrictions on the hospitality sector will remain in place until 26 November (Source: *www.nidirect.gov.uk, 19-11-2020*).
- New measures will apply in **Northern Ireland** from 27th November. All non-essential retail will have to close (with exceptions). Garden centres may remain open. The hospitality sector will also have to remain closed (takeaway services only) as well as contact professions and the leisure and entertainment sector. Schools will remain open. This period is set for a fortnight (Source: *www.nidirect.gov.uk, 23-11-2020*).
- According to the HTA (Horticultural Trades Association), business confidence in the **British garden industry** is back after a record crash in confidence in the spring. This is shown by the Business Confidence Index survey among members. The results are supported by an increase in sales in garden centres in October of +17% (compared to October 2019). The Index shows that most members are relatively optimistic about their future sales and that many are looking for new customers. (Source: *HTA, 14-11-2020*)

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

- Flowers: 13%
- Plants: 13%

**Lockdown status**

- From 30th October until 1st December 2020

**Ornamental plant sales points**

- Florists: Closed from 2nd November ('click & collect'; allowed)
- Supermarkets: Open. From the 2nd of November the sale of flowers (plants are not mentioned in the decree) in retail smaller than 400 m<sup>2</sup> is allowed and above 400 m<sup>2</sup> not.
- Garden centres: From 4th 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**

- According to the official texts issued by the French Government on 3rd November, the following rules apply:
  1. Sale in shops selling flowers and decorative items is prohibited in French supermarkets and shops over 400 m<sup>2</sup> in size.
  2. The ban entered into force on 3rd November by decision of the public authorities, with a lead time until 4th 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 2nd 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*)

# France (cont'd)

## Important articles/information (continued)

- The French Government has indicated that Christmas trees may be sold under further conditions in the coming period, thereby recognising them as 'essential goods'. Every year, 6 million Christmas trees are sold in France. At the same time, garden centres complain that customers are staying away en masse. These centres are open, but consumers often do not know or are concerned about possible checks along the way. As a result, the second wave is still hitting garden centres hard. Floristries are officially closed, but do a bit of 'picking up' here and there and supermarkets do not sell flowers either. The floriculture sector in France has 3,300 production companies, with an annual turnover of 1.4 billion euros. According to PwC, turnover in June was 17% lower than the previous year. Parts of that sector were hit particularly hard, such as cut flowers, with a 48% drop in turnover. (Source: *Agricultural Attaché Network Ministry of Agriculture, Ministry of Agriculture, Nature and Food Quality, 19-11-2020*)
- The federation of French florists estimates that almost 15% of them could disappear in the spring of 2021. In practice, it can be seen that the smallest establishments whose clientele is made up mainly of individual customers are less severely affected than the larger chains whose activities are mainly linked to events. The florists are sounding the alarm and the Federation of French Florists FFAF proposes to create more online sales platforms to pool costs and give visibility to SMEs. (Source *Jaf-info, 16-11-2020*)
- Bigot Fleurs, a company with an annual turnover of € 25 m and 1,200 employees, indicates that the problems with the current lockdown are more drastic than for the first one, which has already claimed € 2 m in losses. "We have lost 95% of our outlets, it is even worse than during the first lockdown", sighs Nicolas Bigot. "We have two production sites in Sarthe, for tulips and lily of the valley, and one in Kenya for roses," he says. His group is now one of the main producers in France. "At the time of the first lockdown, we were able to sell to wholesalers and supermarkets. This time our whole market collapsed," he says. Due to the interruption in supermarket sales - 70% of points of sale - his turnover has fallen sharply, which means that the vast majority of his flowers are now thrown away". (Source *Jaf-info, 16-11-2020*)
- "At present, between 20% and 30% of companies are closed and those that are open achieve just under a quarter of the usual turnover. This was said in the Figaro by the Vice-President of the French Federation of Artisanal Florists (FFAF), Alban Bricout. So the effect is a little less bad than during the first lockdown, which caused 95% of the florist companies to close during the first weeks. However, the organisation registered bankruptcies, especially among professionals working with events, hotels and luxury goods. "About 15% of the companies will be in difficulty or closed by the end of December", notes Alban Bricout, referring to a survey by Val'hor, the inter-professional plant group, in September. This survey has not yet taken into account a second lockdown. (Source *Jaf-info, 16-11-2020*)

# France (cont'd)

## Important articles/information (continued)

- “Offer flowers and save our businesses and French production” is an initiative of the Collectif de la Fleur française and the Chambre syndicale des Fleuristes d’Île-de-France and the Ecole des Fleuristes de Paris. In order to support the companies, but also the whole flower industry in France, an operation has been launched to promote the purchase of flowers by consumers in collaboration with the Collectif de La Fleur Française. First of all, a press release was issued to explain, despite the current circumstances, why continuing to buy flowers is essential for companies, wholesalers and French producers who are mainly dependent on maintaining these activities. Secondly, promotional material was developed that could personalise the retail sector and direct it towards consumers. (Source: Jaf-Info, 18-11-2020)



- The FFAF has developed a poster that florists can use in their shop window to point out to consumers that flowers and plants can still be bought. (Source: Jaf-Info, 19-11-2020)

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

- Flowers: 4%
- Plants: 7%

### Lockdown status

- From 25th October until 24th November

### Ornamental plant sales points

- Florists: Open except those located in shopping centres and market halls where closures apply on Saturdays and Sundays and public holidays. This is still in force until 3rd December\*.
- Supermarkets: Open
- Garden centres: Open

### Important articles/information

- In Italy, measures have been further strengthened. Shopping centres must keep their doors closed on 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)

*\*) According to the latest DCPM (Decree of the President of the Council of Ministers) of 3rd November 2020, ornamental plant products are basic necessities, which means that shops selling ornamental plant products remain open throughout Italy with the exception of those located in shopping centres and market halls where there are closures on Saturdays and Sundays and public holidays. Regardless of the zone (red, orange or yellow), only supermarkets, newsagents, tobacconists, pharmacies and chemists may remain open at weekends in shopping centres. Open-air markets remain open everywhere and at all times with the exception of the red areas where only food products may be sold at weekends. The florists organisation is now in the process of getting the florists into the category of sectors that need to be compensated. The shops may be open but there are no events, birthdays are not celebrated etc. Florists do have to have products in the shop with the result that a lot is thrown away. (Source: Local source, 20-11-2020)*



# Poland

## Share of Dutch exports (Source: Floridata)

- Flowers: 4%
- Plants: 5%

## Lockdown status

- Partial lockdown. Measures will last until 29th November.

## Ornamental plant sales points

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

## Important articles/information

- Polish cut flower producers were badly affected during the first wave of Covid-19. Due to the lockdown in Poland, their losses at that time were estimated at 70-80%. The limited imports of flowers in May and June, together with the gradual easing of restrictions in spring, led to a sharp rise in prices and reduced losses from the first quarter onwards. Growers currently estimate their losses at only 5-10%; the general estimate of Polish producers is that the crisis will pass like other obstacles in the past.
- For more detailed information on cut flower production in Poland during the corona season:  
<https://www.agroberichtenbuitenland.nl/actueel/nieuws/2020/11/17/post-covid-19-plans-of-the-polish-flower-producers>. (Source: *Agricultural Attaché Network Ministry of Agriculture, LNV, 19-11-2020*)

---

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

- Flowers: 3%
  - Plants: 6%
- 

## Lockdown status

- From 01st November and lasts 4 to 6 weeks

## Ornamental plant sales points

- Florists: Open
- Supermarkets: Open
- Garden centres: Open

## Important articles/information

- New support measures announced in Belgium. On Monday 16th November, the Belgian Council of Ministers again announced a number of measures to support sectors and companies affected by the corona crisis. These measures are not yet final. They include, among others, double picking cards, deployment of temporary unemployed, PCSW support providers, temporary unemployment. (*Source: AVBS, 18-11-2020*)



# Russia

## Share of Dutch exports (Source: Floridata)

- Flowers: 4%
- Plants: 2%

## Lockdown status

- Only for the region of the Eastern Siberian Republic of Buryatia. There are also restrictions on Moscow.

## Ornamental plant sales points

- Florists: Open
- Supermarkets: Open
- Garden centres: Open

## Important articles/information

- The Eastern Siberian Republic of Buryatia is the first Russian region to impose a second coronavirus lockdown. Restaurants, shopping malls and other places of mass gatherings will be closed for a fortnight from Monday. (Source: *Moscow Times*, 16-11-2020).
- Corona infections in Russia continue to increase and the number reached 2 million on Thursday. Officials recognise the deteriorating situation but do not intend to take any nationwide lockdown measures. The epicentre of the pandemic remains Moscow, but hospitals in the rest of the country are also facing serious shortages of hospital beds and staff. Russian authorities have placed their hopes in the Sputnik V vaccine, which is currently in phase 3 testing. Deputy Prime Minister Golikova has promised to produce 653,000 vaccines in November and 2.2 million vaccines in December (Source: *Moscow Times*, 19-11-2020).
- Because of restrictions, people increased their spending on houseplants substantially in October 2020, 17% more than in September. Urban Jungle is a trend. Houseplants have gained a popularity that has not been seen since the 1970s. Urban people compensate for their lack of communication with nature. The COVID-19 pandemic has reinforced this feeling, according to analysts (Source: *Landbouw Attaché Netwerk*, 19-11-2020).

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

- Flowers: 3%
  - Plants: 4%
- 

## Lockdown status

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

## Ornamental plant sales points

- Florists: Open
- Supermarkets: Open
- Garden centres: 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 status

- As of 19th November there is no national lockdown in place. Regions can establish regional full lockdowns in case of high growth in infections, but for the time being there is no similar 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 22nd December 2020. From 10th November, travel to Sweden from NL code orange has been banned.

## Ornamental plant sales points

- Florists: Open
- Supermarkets: Open
- Garden centres: 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>

## Share of Dutch exports (Source: Floridata)

- Flowers: 2%
- Plants: 3%

## Lockdown status

- Lockdown: From 17th November, one should stay inside as much as possible throughout the day (exceptions are made). This applies provisionally until 26th November 2020.
- Shops selling non-essential goods are to be closed from 17th November to 6th December 2020.

## Ornamental plant sales points

- Florists: Closed, minimum until 6th December 2020
- Supermarkets: Open until 19:00 at the latest. Supermarkets are allowed to sell flowers and plants.
- Garden centres: Closed. Garden centres that are considered as 'farm' - i.e. with product of own nursery. (So-called Bäuerliche Verkaufsstände and Ab-Hof-Verkauf) - may remain open until 19:00 at the latest.

## Important articles

- In Austria, florists and DIY stores had to close their doors on 17th November because of government corona measures. They are included among those selling non-essential goods. They remain closed for at least three weeks. This is reported by the Dutch embassy in Vienna. Flower shops/garden centres that are considered to be an 'agricultural business' - i.e. with product from their own nursery - may remain open. There are, however, restrictions on opening hours: they may remain open until a maximum of 19.00 hours. And they must be corona proof. (Source: *Hortipoint trade journal for floristry*, 17-11-2020)
- For current measures in Austria see: <https://www.sozialministerium.at/Informationen-zum-Coronavirus/Coronavirus---Aktuelle-Ma%C3%9Fnahmen.html>



# Kenya

---

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

- Flowers: about 27%
- 

## Lockdown status

- 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%
- 

## Lockdown status

- There are no new developments concerning corona. We are following the situation very closely.
- For the time being, the conflict in northern Ethiopia seems to have little influence on ornamental plant production and exports.

## 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 status

- From 19th September to 1st December 2020.
- Non-essential shops remain closed

## Impact of staff deployment

- -

## Road transport

- -

## Air transport

- -

## Important articles/information

- -