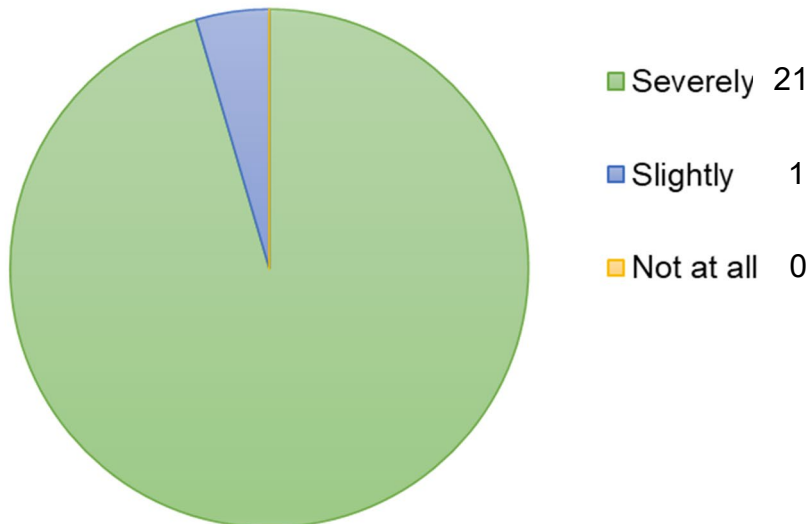




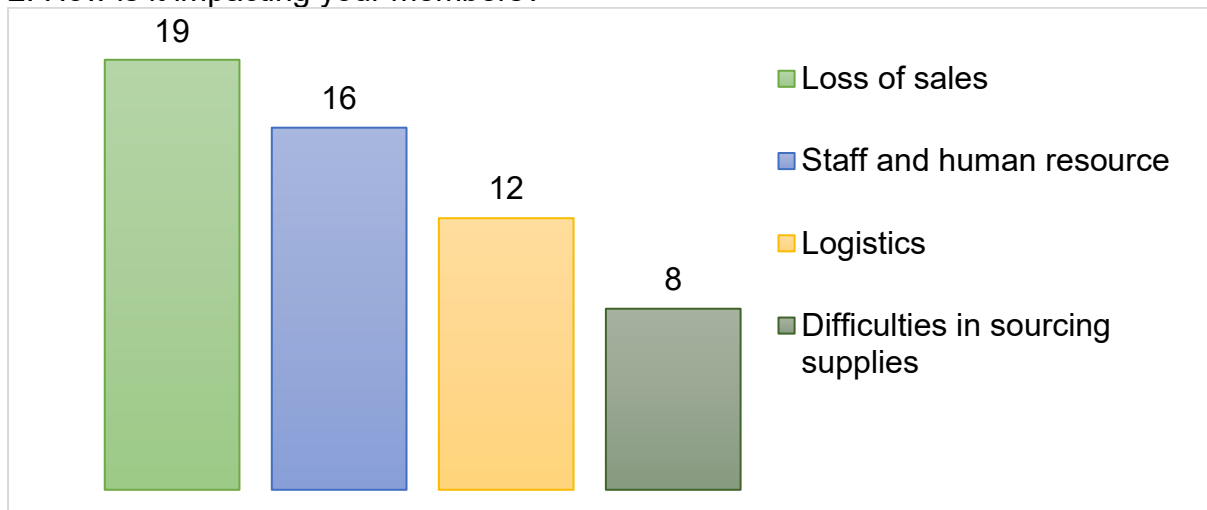
Coronavirus Global Impact Survey

Results of a joint survey by International Association of Horticultural Producers (AIPH) and FloraCulture International magazine (FCI) sent to horticultural trade associations and industry specialists from around the world on 17 March 2020.

1. To what degree do you believe your members will be negatively impacted by the COVID-19 outbreak?



2. How is it impacting your members?



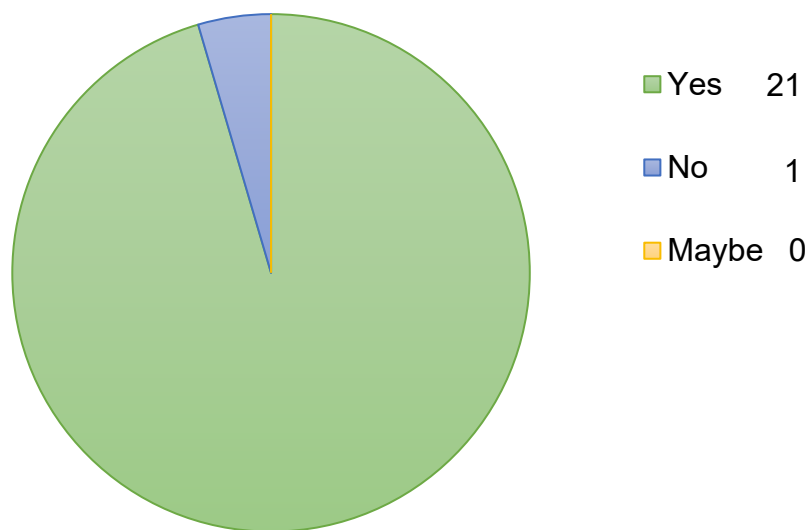
3. Which government emergency policy measures have had the most significant impact, and when did it enter into force?

Country	Responses
Canada	Entry of guest workers from Mexico.
Canada	Canada banned entry of any non-Canadians into Canada, on March 16, just as seasonal workers from Mexico and the Caribbean are scheduled to fly in for our nursery members.
The Netherlands	Later payment of taxes and VAT, garanti in banks, not yet but their are working on the regulation.
Iran	From the first announcement of coronavirus in 20 Feb 2020. There was no special policy.
China	Close of flower markets, flower auction and florist shops. These measures started step by step after the closure of Wuhan City.
Turkey	Ban of air flights /cargo, closing of borders
The Netherlands	As 85% of flowers and plants are exported, the closing of borders and shops in many European countries last week and weekend have had the most significant impact.
Ireland	None yet
Ireland	To early to tell
Greece	FINANCIAL HELP FROM APRIL.
Italy	The order of closing all the 'not necessary' activities.
Brazil	Closing shops, shopping centres, closing borders (of states)
Canada	Not allowing foreign workers into the country under the Seasonal Agriculture Worker Program.
Bulgaria	At the moment we have no such kind of support and we can not remember the relevant measures.
Ukraine	Full quarantine from 15.03.2020.
France	The closure of points of sale (excluding food, pharmacy, banks) and the containment of the population: both have already entered into force.
Ireland	Distancing.
Australia	None specifically at this stage.
Slovenia	None specifically measure the impact of COVID-19 on the activities of florists and nurseries. We have general measures for businesses that take effect no later than 14 days. miscellaneous deferrals of payments, partial compensation of salaries, deferrals of repayment of loans, taxes
The UK	Distancing
France	Fermeture des commerces non essentiels à la vie du pays (ce qui inclut la vente de végétaux) à partir du samedi 14 mars à minuit.
Italy	The quarantine from the March 11th for the whole population has block the business of the nurseries, garden centre and florist, because they must stay closed

4. How is your organisation supporting the horticulture industry at this moment in time?

Country	Responses
Canada	Yes.
Canada	Staying on top of policies impacting members and communicating what we know. Advocating for measure to lessen the impact on our members.
The Netherlands	Lobby and marketing, 3 man year.
Iran	No supporting plan.
China	A survey was organized with Chinese Flowers & Horticulture among the industry about the impact of the epidemic and the measures they took to cope with the situation. The results were published through internet (wechat) to share with the industry.
Turkey	We cannot manage anything yet.
The Netherlands	Our member Royal FloraHolland is constantly in conversation with government, banks and other organisations to emphasize the importance of the sector to the economy and the need to implement supportive emergency measures.
Ireland	We remain open and are willing to deliver plants.
Ireland	We are not an organisation but a sole business.
Greece	ALERT FOR NEWS FROM INTERNATIONAL MARKETS, MORE PUBLICITY OF POSSITIVE IMPACT OF PLANTS IN EVERYDAY LIFE.
Italy	Giving information and support.
Brazil	Taking all measures to maintain the processes going.
Canada	Providing best management practices, access to information and advocating to government on their behalf.
Bulgaria	We are trying to encourage the people to focus on positive things like plants and flowers by using social media, also we are trying to create a survey of impact of COVID-19 and ask government for help.
Ukraine	We don't have any impact except information support.
France	Sharing useful information and messages of support.
Ireland	Sending out e mail supports.
Australia	By providing regular updates and communications while the situation evolves. We are working with the Federal Government to advise that production and retail nurseries are 'essential businesses' in the supply of greenlife for ornamental and production horticulture.
Slovenia	I tried to prepare some ideas, how to selling the flowers, working on e-news what florists can do now, what they can prepared for the future, ...preparing for the future seminars about changes in florist marketing.
The UK	Product is available for delivery when required.
France	Envoi des informations relatives aux décisions prises par le gouvernement et explications/conseils auprès des adherents.
Italy	we are helping the national government to make industry decisions, showing damage and problems.

5. Do you anticipate any of your association's events being cancelled altogether due to the COVID-19 outbreak?

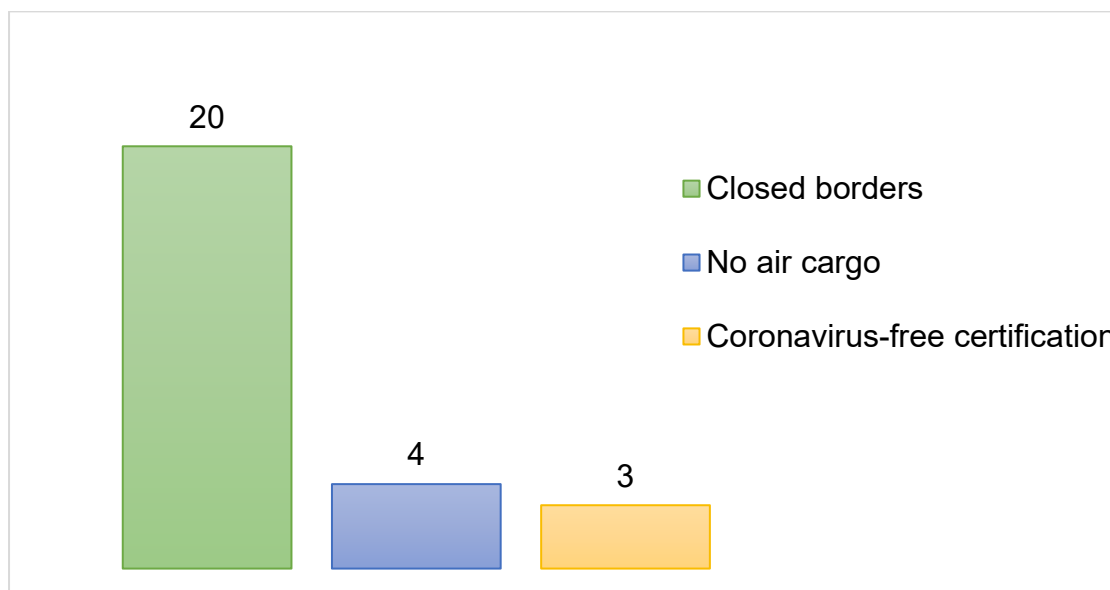


6. How have your events and activities been affected?

Country	Responses
Canada	They are on hold
Canada	Uncertainty in continuing to promote events scheduled for June and August; office has been closed, employees all working remotely, all staff and volunteer travel cancelled, all face to face meeting cancelled
The Netherlands	Cancelled
Iran	One local symposium and one exhibition cancelled.
China	Some meetings were cancelled or postponed. The Hortifloexpo IPM China 2020 were postponed from April to September.
Turkey	our expected export volume will be lower, all international activities are going to be cancelled
The Netherlands	Cancellation, e.g. trade fairs
Ireland	Trolley Fair due to be held on 24th March be cancelled. Trips to see suppliers cancelled.
Ireland	We have had contracts cancelled or postponed
Greece	POSTPONED
Italy	all the activities blocked
Brazil	Severely, canceling all events and meetings
Canada	Canada Blooms, the big consumer show in Toronto with over 100,000 public participants was cancelled 4 days before opening. Financial and opportunity losses due to the closing of this show.
Bulgaria	The trade with flowers and plants almost stopped. Events are cancelled...
Ukraine	We cancel all public activities 1 half 2020

France	Less visitors at trade shows, then the events have been cancelled. Some of our projects will be delayed and some decisions will be postponed.
Ireland	Its gone very quiet
Australia	Some cancelled and some postponed.
Slovenia	My business part is stop, because I have educational programm around the companies, workshops, courses, seminars, not just in Slovenia, also in Italy, Serbia, Croatia, Montenegro. First time since 2011 I can't go to vatican, where I decorated Saint peter's basilica.
The UK	cancelled
France	L'équipe de la FNMJ est en télétravail, du fait des mesures de confinement qui sont effectives depuis le mardi 17 mars à 12h. Nous continuons d'accompagner nos adhérents dans cette crise.
Italy	All the meetings, fairs, events have been cancelled

7. Are your members experiencing an interruption in the logistic supply chain?



8. Please provide examples

Country	Responses
Canada	Aeroplanes shut down international travel.
Canada	Not yet, but it is expected soon.
The Netherlands	Smaller traffic problems
Iran	Exporting to neighborhood countries stopped.
China	Cut flowers in Yunnan Province couldn't be transported outside the production area because of closed of many inter-city and inter-province borders before the Feb. 14, the Valentine's Day, for which the growers expected better sales than previous year. A lot of air cargo were cancelled due to less demand.
Turkey	no air cargo to europe
The Netherlands	Italy, Spain, France, etc.
Ireland	N/A
Ireland	If borders are closed some of our raw materials will be affected
Greece	NO SALES IN ARAB COUNTRIES
Italy	Austria is giving a lot of problems for the products passing their country.
Brazil	States are closing the borders
Canada	It was no, but had to put an answer to complete survey.
Bulgaria	Canceled: week off Forest and week of landscaping Arhitecture.. and many more around the Ester
Ukraine	Logistics cost increasement around 50 percent
France	Closure of companies, employees having to stay at home (specially to keep their children as the schools are closed): staff reduction, reduction of open logistics sites, closure of supplier companies due to lack of employees able to come to work.
Ireland	Supply chain disruption
Australia	No impacts of the options
Slovenia	There is no more import flowers, mandatory quarantine of people
The UK	Europe
France	Il n'y a pas encore de problème de ravitaillement des magasins. Le problème est qu'ils vont devoir jeter une bonne partie des végétaux car ils ne seront pas vendus du fait des restrictions.
Italy	The border between italia and svonakia, slovakia and croathia, was temporarily closed.

9. What is your current advice on holding large conferences, trade fairs or exhibitions?

Country	Responses
Canada	Delay. I am not going anywhere.
Canada	All have been cancelled for now, reassess in a month
The Netherlands	Cancel them
Iran	Canceling all plans
China	For conferences, on-line conferences can be an option before the covid-2019 is in control. For trade fairs and exhibitions, the organizers need to think about cancellation or postponing.
Turkey	online system will be working fine, teleconference can be used, skype
The Netherlands	Cancellation
Ireland	Do not hold or attend
Ireland	not to do so
Greece	MOVE TO 2021
Italy	we think that is better to wait for a while till the situation is going to normalize.
Brazil	Suspending all
Canada	Hold off for now or buy insurance
Bulgaria	We need such kind of events, but maybe after successful fight with Corona virus
Ukraine	Cancellation of all activities for 2020. Human lives is priority
France	All the events are cancelled or postponed to after the health crisis.
Ireland	Dont do it
Australia	Only when 100 or less people indoors and under 500 outdoors.
Slovenia	Everything is canceled at the moment, and should be canceled at least until May. However, events should be postponed to another term in 2020 in order to maintain business and develop horticulture
The UK	cancel
France	Annuler les évènements car de toute façon ils n'ont pas le droit d'en faire à cause des mesures de confinement.
Italy	It's better to avoid all the events till the end of the European emergency

10 What are the most useful things that your members can do to prepare for coronavirus?

Country	Responses
Canada	Do what the WHO and Health officials say. Follow the science
Canada	Protect themselves and their staff, don't panic. Ensure staff are aware of the work policies to prevent spread.
The Netherlands	Try to avoid to put the hole company in contamination,
Iran	Stay at home
China	They stay at home and keep an eye on the situation of the coronavirus as well as the ornamental horiculture from many channels. Some on-line meetings and discussions awere organized about how to cope with the situation and how to recover after the epidemic. Some are tring to sell their products on-line and via live streaming. Some are doing on-line free training on flower design and home decoration. Some are learning horticulture knowledge when staying at home.
Turkey	no idea
The Netherlands	Our members and industry is already affected.
Ireland	On line trading, use of telephone (do not call in to nursery for collection).
Ireland	heed the advise of government and WHO
Greece	STAY IN TOUCH WITH ASSOCIATION FRO POSITIVE PUBLISHING AND NO PANIC
Italy	reduce the human contacts
Brazil	Reduce all investements and costs
Canada	Business continuation strategy, labour strategy and financial cash flow ability.
Bulgaria	Follow instructions of Ministry of Health
Ukraine	Self isolation and health discipline measures
France	Businesses almost all closed and people have to stay at home (lockdown). When it's possible, companies must organise so that the employees work at home and otherwise apply the measures to avoid the virus at the workplace (being able to wash their hands very often, hydroalcoholic gel, coughing in their elbow, keep a distance of at least 1 meter with other people, gloves, masks ...).
Ireland	Follow Government advice
Australia	Ensure they read information provided to manage the situation and keep staff informed on how to prevent infection.
Slovenia	Start thinking out of the box. Use electronic media, adding new sales channels and payment methods for services.
The UK	Distancing and Hygene
France	Respecter les mesures de sécurité, les distances entre les personnes, se laver régulièrement les mains, se mettre en confinement si suspiscion d'avoir été contaminé même si on a pas de symptômes...
Italy	We have the virus already, so we can only respect the national measures

11. How are your members managing disruption to their supply chains as a result of coronavirus?

Country	Responses
Canada	Lay off's of staff, uncertainty,
Canada	Customers are no longer shopping - demand for nursery products down, inventories building up. However, growing supplies are still easily sourced.
The Netherlands	Not a problem yet, the problem is the lack of demand
Iran	They can do nothing at this moments
China	They keep contact with their customers via internet and try to cope with the problem they both are facing durrently and how to recover with cooperation after epidemic
Turkey	they have no idea of future will bring all demand from customers have been seriously decreased
The Netherlands	As sales have dropped dramatically growers and wholesalers have to destroy their crop and are busy to survive.
Ireland	No disruption at present.
Ireland	Too early to tell
Greece	REDUCE PRODUCTION
Italy	they are waiting for better times
Brazil	Reducing costs
Canada	Not a current issue but it will become one in a few weeks.
Bulgaria	No possible to be managed. Situation is changing with ours.
Ukraine	Priority to local suppliers, stock sales, import stop
France	The business has been interrupted.
Ireland	No Disruption yet
Australia	None experienced to date.
Slovenia	In the absence of flower self-care, flower shops close. They only operate gardens that have some of their own production. It will be absolutely necessary in the future to think about self-care with ornamental plants.
The UK	None yet
France	Cf question 9
Italy	They can only stop the production and ask for refund to the government

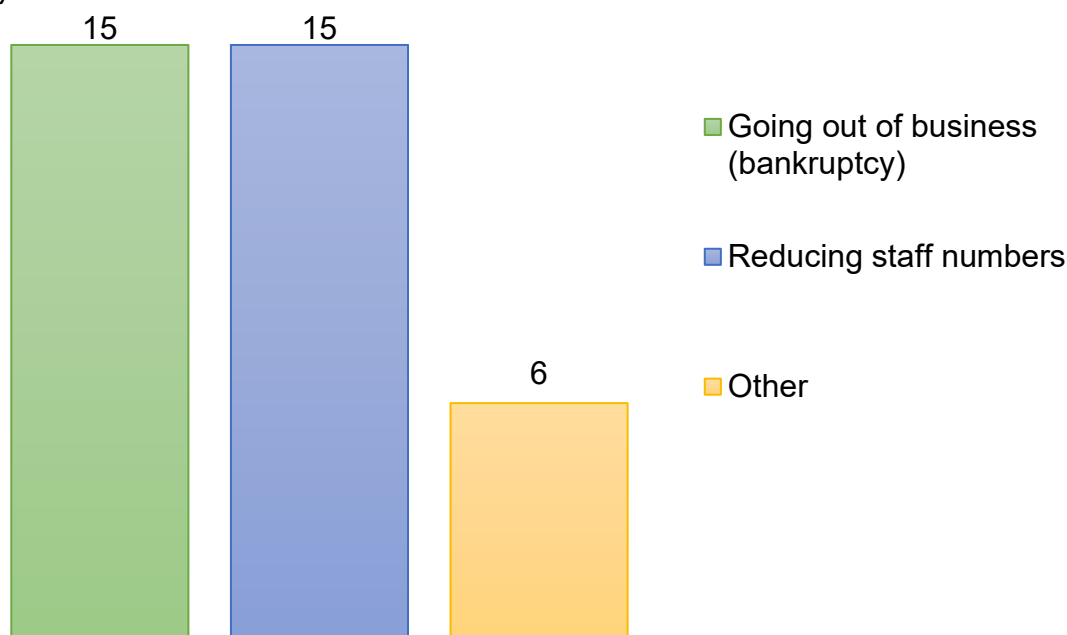
12. Do you know what support will be available from your government for companies managing the impact of coronavirus?

Country	Responses
Canada	Immediate access to Employment Insurance for employees,
Canada	There are some announced - Employment Insurance for employees - have waived the 1 week waiting period; a vague announcement today of government financial support for those affected.
The Netherlands	Same as 4. and there are new support measures in the pipeline
Iran	Still nothing
China	Deferring tax and insurance payment. Offering bank loan with low interest or favorable financial policies for small enterprises to have enough cash flow.
Turkey	we dont know yet
The Netherlands	A package of emergency measures has been published, including: 1. allowance for labour costs; 2. deferral of tax; 3. capital guarantee for bank loans and bank guarantees; 4. compensation for the affected sectors/entrepreneurs
Ireland	No - not at present but urgently required.
Ireland	Not at this point
Greece	FINANCIAL SUPPORT, ENFORCE SALE OF PLANTS TO GREEN WORKS IN THE COUNTRY
Italy	at moment there's no support for the floriculture
Brazil	Not yet
Canada	Subsidies for employment, low interest loans, delay on taxes, etc.
Bulgaria	No
Ukraine	Minimum support, no source available.
France	Yes, the following measures have already been implemented : for instance, reinforced partial unemployment, payment period, postponement of social security contributions and taxes, rescheduling of bank credits, State guarantee for bank loans.
Ireland	Financial
Australia	Yes.
Slovenia	miscellaneous deferrals of payments, partial compensation of salaries, deferrals of repayment of loans, taxes
The UK	Employment payments/ 3 months no repayments
France	Report de charges fiscales, activité partielle...
Italy	Our government should permit the opening of the garden center and florists, and give refund to every company of the industry for the losing of money

13. If you are making any estimates on the impact on the industry, such as % down on sales, please share them here (we understand these are only estimates at this stage):

Country	Responses
Canada	We don't know. we still have snow on the ground. This volatile climate changes daily.
Canada	50% reduction in sales; labour shortages in nurseries 40-50% from seasonal workers not being able to come into Canada
The Netherlands	50-60 % down
Iran	May be 50 percent reduction
China	The whole industry may be down for a certain percentage this year. However, the future of the industry in China is bright. With the number of domestic cases getting down and under control, the situation in China is getting better, some people predicted the industry may have a sort of retaliatory or compensatory growth.
Turkey	minimum %30 down on sales
The Netherlands	80-90% or more down on sales
Ireland	50+% down on historical trading and expected to get worse.
Ireland	Too early to say
Greece	50% AT LEAST
Italy	we think we are going to lose 40% af the total annual turnover.
Brazil	40% from april to december
Canada	-15%
Bulgaria	50% even more
Ukraine	Fall 20-30 percent in 2020
France	Two digits % down on sales
Ireland	30%
Australia	At this stage plant sales are continuing in particular vegetable seedlings and vegetable seeds.
Slovenia	Due to government regulations, all flower shops are closed. So it's 100% downtime.
The UK	50%
France	No idea sorry
Italy	I can estimate the 60%, based on annual turnover

14. What outcomes do you expect to see happening to businesses in the floricultural industry?



15. Please share your concerns or comments:

Country	Responses
Canada	I think that this is the worst time to react to this crisis. Already people feel saturated with information either true or not. They governments are feeling that short term pain makes for longer term gains. It depends. I think there are many that will not survive the short term. Mental anguish for industry members are a concern.
Canada	We all need to work together to contain the spread of the virus, but we still have work that has to be done. Juggling the common good and the disruptions to business is causing business owners much stress. Gardening may become more of a hobby this spring with everyone staying at home.
The Netherlands	Will we recover when we are through the crisis?
Iran	If this occurs for short time it is possible to tolerate and if it goes for more than 3 months it will significantly affect and might go bankrupt of some business.
China	The whole world needs to unite to fight with the pandemic.
Turkey	We will head a difficult year for the industry.
The Netherlands	At this moment the expected damage is estimated at 2 billion Euro
Ireland	We are extremely concerned as we do have supply and gardening is a pursuit that can be carried out in solitude and is Beneficial to all. We urgently need these facts to be highlighted to the general public to encourage business. We are in the difficult position of having to plan 10-12 weeks ahead to have stock available when things return to some normality. We are having to reduce staff and not take on our usual seasonal workers at present or until we have some certainty.

Ireland	If we are allowed to stay open the floricultural industry could have a positive outcome for the health and well-being of all
Greece	THE NEXT DAY OF CORONAVIRUS WILL NOT BE THE SAME FOR INTERNATIONAL FLORICULTURE
Italy	This is an awful situation, but we hope the the sacrifices we are doing will be useful for a better the future
Brazil	How many time this will last?
Canada	The floriculture sector will be more impacted than Nursery and woody ornamentals, due to the nature of missed Easter, and other high sales dates. The nursery sector in Canada has until late April / May to resolve some of these problems or they too will face high losses.
Bulgaria	Who can imagine before 15 days all those bad things? We are like a prisoners...
Ukraine	Most probably the most critical crisis for the last 30 years.
France	It's impossible to obtain insurance cover for operating losses linked to the health crisis, difficulty in relaunching activity at the end of the crisis since the most prosperous period (the one where the bulk of turnover many companies are carried out) – spring - will have been suspended by closedown and movement restrictions, risk of having a sector shutdown for longer than the only time of the health crisis. In France, we fear that the specificity of our industry will not be taken into account: a highly perishable, seasonal product, a plant cycle that can't be interrupted during the crisis and therefore an inevitable loss of an entire production
Ireland	Very concerned about health and economic outcome
Australia	The most important thing to do is to support members to ensure they can continue to operate as best as possible.
Slovenia	Already, some florists have been on the verge of survival, and they will surely close. The rest will reduce the number of employees, but I think that the governmental institutions should provide florists with resources for education as well. so they will remain competitive and recover from this awful situation.
The UK	Adhere to the professional Medical advise
France	Thanks
Italy	The situation is terrifying, the impact in Italy is terrible because we have the only perishable product to have been completely blocked on the market. the product dies in companies that cannot sell anything. hopefully it will end soon

Ends

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Notes for Editors:

International Association of Horticultural Producers (AIPH)

Since 1948, AIPH has united horticultural producers in an international community that thrives to this day. Much has changed in that time. Technologies advanced, cities rose from the ground, and we have become more connected than ever. As a result, our essential bond with nature has been weakened. AIPH strives to reignite and uphold an appreciation of plants that we believe is a basic human instinct. We support the work of grower associations globally and together we champion a prosperous industry, growing plants that enhance lives, advance societies and sustain our planet, for this generation and the next.

FloraCulture International magazine (FCI)

FCI is a publication specific to the international floricultural industry. It is distributed directly to individuals and through FCI Partner Associations, (consisting mainly of growers, breeders, wholesalers, landscapers and some retail), on a bi-monthly basis from the Americas to Australasia in both printed and digital forms. Currently, 5,500 subscribers receive printed versions directly, and 100,000 welcome it digitally - and many more people see it online every day. FCI is delivered to 142 countries across the globe and features at many expos, and trades shows throughout the world.