

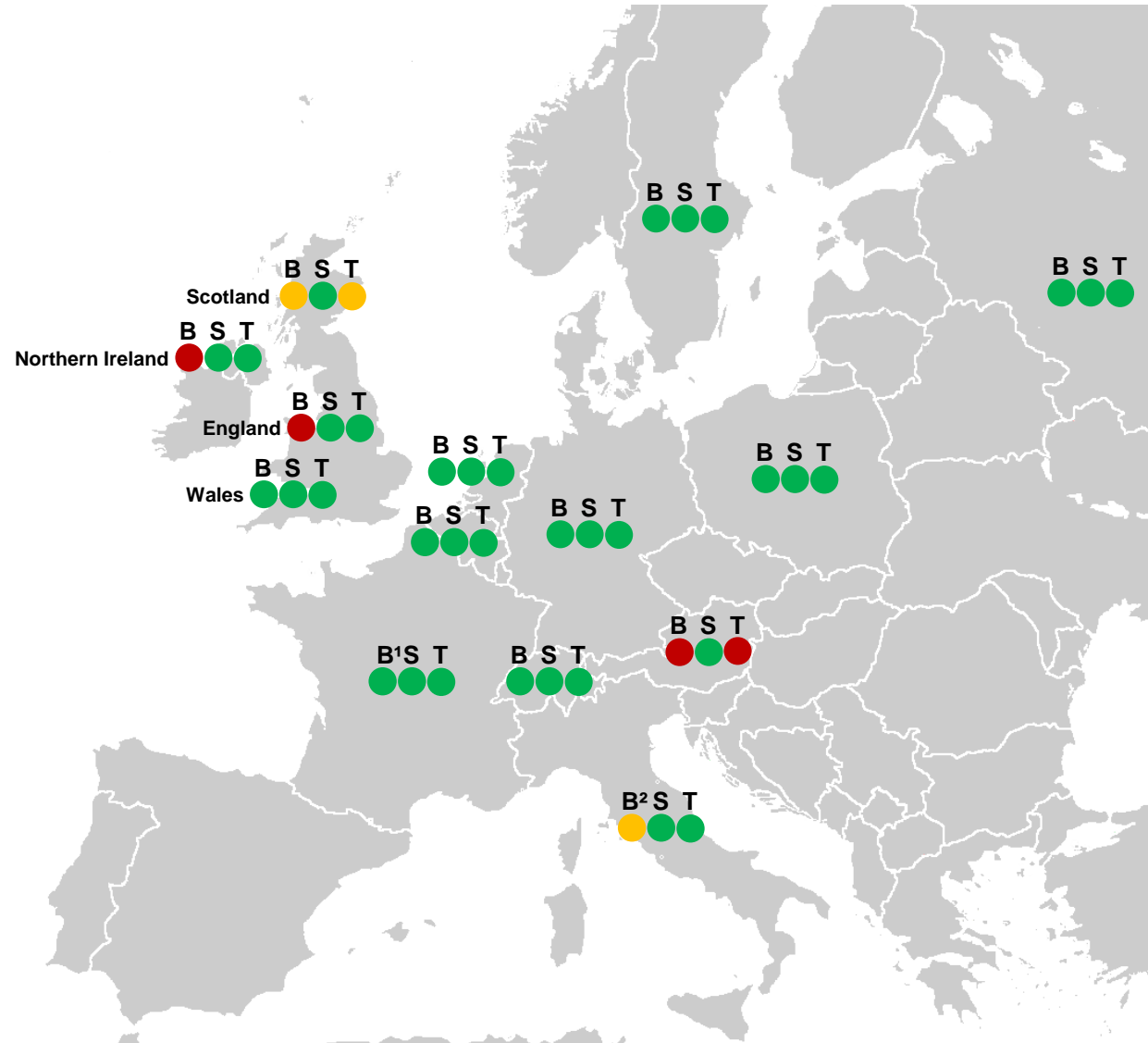
International market developments

The main market developments as of 26th November 2020

26 November 2020
Royal FloraHolland

This report contains information as known on Thursday 26 November 15.00h. 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 : 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/>

Lockdown status

- Partial

Ornamental plant sales points

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

Important articles/information

- None



Germany

Share of Dutch exports (Source: Floridata)

- Flowers: 27%
- Plants: 26%

Lockdown status

- As of 26th 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. The rules are mainly aimed at restricting contact in leisure time. For example, cinemas, bars and swimming pools are closed. There may also be no major events and no public at sports events. Furthermore, public buildings are closed. This is expected to last at least until mid-January. All this may have an impact on the floriculture sector, particularly in terms of products for events and on the location of the closed companies and institutions.

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 respective Länder 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.
- 26th November: [German corona rules probably apply until January | NU - The latest news first on NU.nl](#)

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 9th 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 there, 10 out of 32 regions will be on level 3; the rest below.
- Northern Ireland: Circuit Breaker Lockdown: from 16th October to 26th November. However, there will be some relaxations from 20th November. New Circuit Breaker Lockdown measures from 27th November until 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

- Plans have been made between **England, Scotland, Northern Ireland** and **Wales** to temporarily relax lockdown measures between 23rd and 27th December. During this period, up to three households will be allowed to form a temporary "Christmas bubble" and be together indoors. For **Northern Ireland**, the period is from 22nd to 28th December because of the possibility to travel between countries. Moreover, people are not allowed to meet their "Christmas bubble" in catering or entertainment venues. (*Source: BBC.UK, 25-11-2020*)
- Non-essential shops will be allowed to reopen at the end of the lockdown in **England** on 2nd December, according to Boris Johnson. From 2nd December, the regional measures will return in three levels, but each level will be strengthened. For example, at the highest level, pubs and restaurants will have to close and travel outside the region will not be allowed. Regions will be informed of their level from 26th November. The allocation of levels depends on a number of factors, including the number of infections in an area, the reproductive rate and the expected pressure on the local NHS. The allocation by level will be reviewed every fortnight. This approach will last until March. (*Source: BBC.UK, 24-11-2020*)
- Cut flower growers in **Scotland** have united to form a new group: "Grown over Flow". With this they want to increase the awareness of the domestic industry and reduce the dependence on importing flowers from the Netherlands. According to the group, the Scottish climate lends itself to growing flowers with high-quality soil and fewer pests and diseases. 90% of the cut flowers sold in Great Britain are imported, mainly grown in Africa and shipped via the Netherlands. (*Source: The Herald, 25-11-2020*)
- 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 (with the exception of pick-up services), 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*).

Share of Dutch exports (Source: Floridata):

- Flowers: 13%
- Plants: 13%

Lockdown status

- Termination of lockdown in three stages:
 - From 28th November, shops can be reopened until 9 p.m., subject to distance rules (max. 1 person per 8m²); service / home delivery allowed
 - From 15th December, end of lockdown, while maintaining curfew, provided that the objectives are achieved.
 - Stage 3: not yet known

Ornamental plant sales points

- Florists: Open from 28th November
- Supermarkets: Open (*)
- Garden centres: Fully open from 28th November

(*) Flowers and plants are not explicitly mentioned in the relaxation measures. We assume that the restrictions for this will also cease from 28 November.

Important articles/information

- Since 14th September, you can buy flower bouquets at any time of the day at a vending machine at the entrance to Lumigny-Nesles-Ormeaux. "This is a project on which I worked for two years and which has accelerated through the lockdown". With these words Caroline Renard, florist of the brand Au jardin de Caroline, located on the Carrefour market in Rozay-en-Brie, looks back on the realisation of this project. (Source: *Jaf-info*, 23-11-2020)

Important articles/information (continued)

- DIY shops of Les Mousquetaires support sector; the DIY shops of Les Mousquetaires and Intermarché are committed to supporting the French horticultural and plant sector which is now suffering the consequences of the lockdown. In the absence of sufficient outlets, many horticulturists and florists are afraid that they will not be able to sell their stocks. Bricomarché, Bricorama and Intermarché are helping this sector, which has been hit hard by the health crisis. One of the actions is a bouquet of 10 flowers that is offered for every order on the DRIVE Intermarché. Distribution channels are limited and players in the industry find it difficult to sell their stocks, especially as flowers are extremely perishable products. In order to revitalise the activity of the sector, Intermarché ordered 833,400 flowers from 7 French producers. (Source: *Jaf-Info*, 20-11-2020)
- The ornamental horticulture sector will receive special aid of EUR 25 million from the French Ministry of Agriculture to compensate for the losses suffered as a result of the lockdown. The aid scheme is now being notified to the European Commission. In addition, the ornamental horticulture sector is also submitting an application under the so-called Plan de Relance (generic corona recovery plan). With this plan the sector wants to improve the sales of flowers and plants thanks to digital solutions (Source: *Landbouwattaché Netwerk Ministerie van LNV*, 27-11-2020).

Share of Dutch exports (Source: Floridata)

- Flowers: 4%
- Plants: 7%

Lockdown status

- From 25th October (and for the time being 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 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)
- (*) According to the latest DCPM (Decree of the President of the Council of Ministers) of 3rd November 2020, ornamental horticulture products are basic necessities, which means that shops selling ornamental horticulture products will remain open throughout Italy with the exception of those located in shopping centres and market halls where closures apply 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. By the way, 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. Measures will last until 27th December.

Ornamental plant sales points

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

Important articles/information

- From Saturday 28th November, the shopping malls will reopen, under sanitary regulations including 1 customer per 15m². Restaurants and hotels will remain closed until at least 27th December. There will be one period for the school holidays, namely from 4th to 17th January. Until then, schools will continue to teach online. The government has called on schools not to go on holiday during the holidays. It has been announced that work is being done on legal regulations to limit (domestic) travel movements during the coming period. *(Source: Agricultural Attaché Network Ministry of Agriculture, LNV, 26-11-2020)*

Share of Dutch exports (Source: Floridata)

- Flowers: 3%
- Plants: 6%

Lockdown

- From 1st 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)
- (*) The Consultation Committee (which brings together the various public authorities) will today, 27-11, consider the current coronary measures. There may be a relaxation of the lockdown. The presidents of the government parties MR and CD&V have today publicly put pressure on the federal government to relax at Christmas. However, Prime Minister Alexander De Croo (Open VLD) stressed earlier that not much is possible at this stage. (DeStandard.be, 26-11-2020)



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

- Moscow has extended until 15th January the measures put in place to delay the spread of the coronavirus; this was announced by Mayor Sergei Sobyenin last Thursday. The measures require residents aged 65 and over to be in self-isolation and the requirement for 30% of the employees of all companies to work remotely. *(Source: Moscow Times, 26-11-2020).*

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 the western Swiss cantons of Vaud, Neuchâtel, Freiburg, Geneva and Jura - where measures additional to national measures apply - restaurants will be allowed to reopen from 10 December. This was agreed by the economic ministers of these cantons. *(Source: SRF, 25-11-2020)*

Share of Dutch exports (Source: Floridata)

- Flowers: 2%
- Plants: 4%

Lockdown status

- As of 26th November there is no national lockdown. Regions can establish regional full lockdown in case of high growth in infections, but not yet comparable to a total of 21 regions in Germany 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 prefers not to force them to do so. Other than that, from 22nd November, it will be forbidden to gather with more than 8 people and buy alcohol from Systembolaget after 22.00 hours.
- 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 will be 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>.
- 26th November 2020: [The country that never went into lockdown will go over anyway: Sweden, too, is now taking stricter measures | VRT NWS: news](#)

Share of Dutch exports (Source: Floridata)

- Flowers: 2%
- Plants: 3%

Lockdown status

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

Ornamental plant sales points

- Florists: Closed, from 17th November to at least 6th December 2020.
- Supermarkets: Open until 19:00 at the latest. Supermarkets are allowed to sell flowers and plants.
- Garden centres: Closed, from 17th November to at least 6th December 2020.
Garden centres that are considered to be an 'agricultural business' - i.e. with product from our own nursery (so-called Bäuerliche Verkaufsstände and Ab-Hof-Verkauf) - may remain open until 19:00 at the latest.

Important articles

- Chancellor Sebastian Kurz (ÖVP) has announced that next week the Council of Ministers will decide on an 'opening plan', proposing 'cautious' steps to relax measures. However, it already seems certain that schools and shopkeepers will once again be the first to open, with security measures still to be taken. (Source: News.at, 26-11-2020 - <https://www.news.at/a/coronavirus-oesterreich-11360814>)
- 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.
- Non-essential shops closed

Impact of staff deployment

- -

Road transport

- -

Air transport

- -

Important articles/information

- -