

ANNEX to the Minutes of the ENA General Assembly hybrid Meeting held on Thursday 2 September 2021.

The market situation in each country. 

The information on each country situation as explained by the delegates (automatic transcription).

BELGIUM

I think like in general in all other European countries, situation in Belgium for industries is good; last season was very, very good. I think everybody is optimistic. Last week, we had also our trade fair and Belgium, which was also a lot of interest of clients. And which also considered as a there's a good vibe in our sector. And at the same time, I feel also some people who are a little bit crazy as that optimistic and they're also a little bit thinking about how long will it take and maybe it's still the COVID, which is the COVID influence, which is still influencing our industry. And for some people it feels a little bit confusing, also optimistic and we have to think we cannot make too big decisions on the long term and just keep quiet and try to accept everyone is in good flow. People have less money to spend, and people will start traveling again, good restaurants, again, the governments have lots of debt, but we are in good flow.

BULGARIA

We also here in the beginning of COVID crisis last year, in first the first half of the year, we mentioned that there was a decrease of the demand on the market, but afterwards, afterwards, we had very good period for sales, for almost all of our members. Our forecast is optimistic, the forecast is positive for the coming season. So this is the real situation as of now for our members.

CZECH REPUBLIC

It's fine, production is a little more and the future maybe a little more.

DENMARK

Well, I think every nursery in Denmark is so happy as many years ago. All the sections have good position for the market. Even if it's for a garden centre or just the landscape. A few weeks ago we have a fair for garden centres fair and everybody was happy. And last week, we have a big fair on Island Zealand for a landscaper and government buyers and it was the same. We have more than 10,000 people who visit the fair and everybody just raised their hand, and some nursery is talking about it. We are back to the sixties where we could earn a lot of money. I have heard about this history from the old guys here. And now I can feel it by themselves. And it's so comprehensible the last many years, the turnover has not existed or just a little turnover. What is a little different this time in Denmark is if we are looking to raise the production, that can be a problem, because we have problem to find workers. And if we are looking for forest industry plans, then we have problem to have seeds. When we are looking for a whole Europe, and if we are looking for fast, indirect street plans, then we have problem to proceed. So I think this time, that production will not just rise, we

have a problem. Also, we need to ask the bank for money to raise the production. So I don't think it will grow here that production; I think a little bit more about what you produce this time.

FINLAND

We had about spring 2020 was turning up to work really well. And also the summer season was very good for 14 months. And this year, we started a little bit late in the springtime. A really strong spring sales. And until the heat came in the middle of the June and stop the sales totally. But the production is going on all the time quite strongly. One of the big nurseries closed down last year. But the other ones they got up with the numbers this season. So probably the numbers are about the same as last year. And happy to tell the general price level seems to get higher now in Finland, which has been quite stable while many years but now we are going up maybe 10 to 15% for the next season.

FRANCE

The demand is good at nursery, consumer market and landscape markets. One concern is the lack of young plants to work, as we had mentioned, lack of young plants to create new products to market.

GERMANY

in Germany, you saw already on the screen that we had a good season, there was a good demand in both sections, in centre retail sales and also in amenity and landscape market. We had a conference with some decision takers, four weeks ago or six weeks ago and there was a question on what's the future will bring us after COVID. but it is for everybody uncertain, and people will sure travel a bit more, than we spend more money on other things, but my opinion is it's a flame and the flame is burning. And this flame keeps burning and people are aware of private home of the local authorities also now with a new election take more care in the future trees and green and cities and public green. So, I believe in my opinion, we still can be optimistic and the future in Germany for nurseries is optimistic. You have to know that in the last 20 years there was a reduction in members, 25 to 30% nurseries disappeared because of money problems or because of no following up problems with the young generation. So that is when we come to this extra part later when we talk about shortage of plants. And so the situation is good. For the wholesalers it's a bit more difficult because every wholesaler is more or less going to the same sources and to make a deal and to make a special good deal because you find something which not everybody is aware of. It's a bit more difficult. In the future there will be more competition, it will be more open because they are more or less using same producing nurseries when you do wholesaling and projects or even in garden centre sales. It's a situation at the moment even at Oldenburg is when you want to reserve plants for delivery in the autumn or spring the small producers ask prepayment 100%. Sure, they prefer now to sell them straight away now in September October and not to overwinter the plants. So when as a garden center supplier went to buy and you need also the plants for sure in the spring. And so but a lot of producers they believe it's easy come easy go so I have the money in my pocket and the plants are gone. So the situation is quite good for our sector.

I had an interview last spring with the German Press Association, and they send it over to all possible newspapers in Germany. We have a future tree sector where we plan 'future trees' in view of the shortage of water quality. This article was a big article, almost one page of a newspaper. And this article was printed in 50 newspapers in Germany. It was incredible the interest of the public, the concern of climate change and in what we do against it with other trees, new trees. Unfortunately, this is also destroying a little bit since the native trees idea in Germany, you can also have other problems instead of using native, autochthonous species.

HUNGARY

I think this is also very good, we are very optimistic, I think the green sector cannot complain, we have so many governmental and EU projects going on. On the other hand, I think the retail sector also had a very optimistic season behind; because of the lockdowns many people turned into their own smaller area. So, the people also focused on their own building their own home. So, I think they also generated leads in the past half year. So, after all, I think as the President said the flame is burning, I can get Hungary also for another at least one good year.

IRELAND

In Ireland last year and the year before we had a rise in turnover about eight or 10% a year. It seems to have a lot of new gardeners from the epidemic and younger people are coming in and taking a lot of product now. So, the demand is good. Some shortages and supply the only worry; and the fact that we have that peat moss issue. But all sectors of the market the landscape market and the nursery stock sector is very buoyant. Everybody seems to be reasonably happy with their output.

ITALY

Last season has been very good in Italy, like I think all over Europe. And we have had a very good period for production, we suppose something increase something like 10% and also the internal market and the export market increase a lot, especially garden centre increased at least a 15% of the selling. And we have a very good forecast with green, with certain difference because we consider that the short cycle plants, I mean small plant and for the next year, I think that increased the production and they can sustain the higher demand. Long cycle of plant will be a problem and especially for long sizes of plant. I think that will be a lack of tree for the next few years. And this could be a problem. And I think it's another point of discussion. And what I see that we have an increase in the price. That's an average 10 or 15%, depend on article. What would you like to speak with you is my opinion about this, how a pandemic situation can influence our sector? I think that the reason that people now stay at home and more money to spend in the garden is a little bit too easy answer. I think there is something else, I think that with an epidemic situation, the people get less unsure. And that want more green. And I think that this demand of more green for our sector is very important, and will influence also in the future, maybe we, in the future, we, we do difficult that we will find the same increment, that will disappear. This new idea of green that is coming out, give our sector power in the future. So I'm very optimistic.

NETHERLANDS

I participate in different researches in the Netherlands about the value of green. And it's a tendency that the communities in the Netherlands are now investing in research projects, big research projects, which deal with the importance of green cities and climate change. So it's not the industry investing, but it's really also the communities that see an interest in to solve problems in cities. And we want to, we want to know more about how to plant the correct tree in locations. And that's really a good development I wanted to share with you because I think it's a good development because then we know more about behaviour of plants in the future.

So the market situation in the Netherlands was excellent. And the forecast for new season is also good.

POLAND

As you can see by the numbers, the sales has dramatically increased. Very satisfied, but at the beginning, everyone was very worried what would happen and a little, let's say we are a little bit afraid right now because the retail market has not increased increase as much as we would like to. So, what we strongly believe is to combine our demand. So if you build a house, or build your balcony or build your terrace, please combine it with the plants, this is good for yourself and good for the future. It's good for the air. And it's good for you. So, as long said, the idea to, let's say, increase the impact of the customers is very important for us in common because we would like to sell more to the customers, and end the sale has increased a little bit. But when it comes to export, and when it comes to wholesalers, it has been really wonderful. And we really think it will go this way for some time, even though the COVID has made many, let's say, changes on the market. And we are also very happy to be back on the track when it comes to the exhibition because it's already two hours of our exhibition, which is life in Varsaw now. So we are very happy to have this.

SERBIA

Many things that you already said is the same in Serbia, as well as in Europe for our market, especially for the retail markets. People are building a lot of houses on mountains, by rivers and weekend houses, so they must plan something over there. So that way of sales is growing. Also, we have many big projects, mostly in Belgrade. So there are planting plans, next to the to the highways and in Belgrade, where mostly the big projects are big buildings and big plants. So also, we have a lack of the big plans and big trees in Serbia, actually, we don't have a production of those types of trees at all. The biggest one in Serbia, maybe 14-16 or 16-18. No, no bigger trees in our production. So mostly is import. In production I can say that this has been the same way before we started. Some nursery decided not to invest too much because they didn't know what's going to happen in future but now it's growing again. Sales are going also up so that's maybe the reason why we show future is good, I think.

SPAIN

We have had a very good campaign, as you can see in the picture. The production was similar to the last year but the market, both internal and to retail and amenity, this was a big increase or strong

increase. The sales there were well, sale practically all goods or products. And we had a significant increase in the flowers and plants in the first five months of this year. The increase was 59% more than the same period of the last year 2020 and 32% more than in 2019. We had to remark that sales in Germany we have an increase around 40% that is, that is very, very good for us because the German organised retailers, understand or think that the Spanish plants are high quality products. But I have to say that the growers didn't plant more area because of the COVID, because they are afraid of the COVID and we have into account the increase of production cost. We have to implement measures, the increase of the raw material, cost of transport, they all increase on and the benefit wasn't the expected.

SWEDEN

Like other countries, we have good good good sales.

SWITZERLAND

I only can confirm what was said widely that we also had a very good season. Some even the achieved an above average annual result. What happened this year is that we have a lack of plants, of certain plants especially for example berries and fruits. What was a bit special this year the weather extremes that we had. We have locally had major damages of the plants and to infrastructure due to hail or too heavy precipitations or wind. But in general the situation is still good, we will see what the future will bring.

TURKEY

Almost like every country, Turkish and the majority of nurseries are very happy. At the beginning of the pandemic last year in the springtime, there was a panic about how it will end. And what about our stocks can we sell it or not. So, some reaction, some of the nurseries reduced their future plans of production This is why our production numbers are in yellow, but then the nurseries who keep the product in hand they got good money and with increasing prices. So, that one year's ago reaction has a good impact on stabilizing the market prices increasing like the Germans do and then of course, there is enormous raw material and material increases. Two sides, one is euro euro dollar dollar increase and the other one is the Turkish Lira is decreasing. So in the middle, Turkish manufacturers has more increasing the labour cost. So, in the end, the prices are good, and the export market too, maybe due to a currency advantage or geography advantage. The export market with us like that ended up with \$110 million export market. But this year in seven months we exceeded this number and we were expecting the 50% increase at the end of the year. It can also be more, we can also be more positive. But we have to face that many companies are too small. Yes, many nurseries are shutting down, they can't compete because of so many reasons. So, the big ones and the medium size are also producing and they want to switch to the mass production. They didn't produce the index of the variety, so, we couldn't find each and every product we needed in especially for the amenity and the landscaping market. So, the palette of production becomes narrow. So, this is the risk, and the retail market is good like everywhere like every individual the consumer behaviour is demanding. So, we have tried to catch that demand, and this is the market.



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We as a union, we are increasing our number of nurseries, we are increasing our college actually the number of 70 to 80 new members are not new companies, they are also operating but they are right now in our union.

The export is going far east also, I mean, the Turkish construction companies are going to the former Soviet countries and building construction. We feel like a symbiotic relationship with the construction companies, where they go we go, and then we make a exports. We also produce, we also sell, and we also implement now. This will go on, and for example the Iraqi garden centres are popping up.

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