

ANNEX to the minutes of the ENA General Assembly Meeting held online on Thursday
18 March 2021 at 10h00 CET, 09h00 WET, 11h00 EET

COVID-19: sector situation in each country.

Belgium.

Country regulations are quite stable for the moment, the COVID situation is quite stable, which is good, I think that you don't need to change all the time regulations for your workers or seasonal workers. So that's quite good and gives more rest for the nurseries. But the COVID situation is quite fragile. So we are always looking that is not going the wrong way. And in general, I think the business for the nurseries is going well in our country. And there are also already a lot of shortages in plants; the garden contractors are to search for them a lot of plants because they are not all available anymore. I think, in general, it's going well in business. In beginning of the one year ago we had a lockdown here in Belgium and there's some panic in the sector, orders have been cancelled and actions have been cancelled. Then after two months the Garden Centres could open again, and the sector lived up. People work in the garden and there's a lot of demand for plants. In fall and winter Garden Centres remained opened, unlike some other countries.

Bulgaria.

What we face here in my country, there is no good solution for our business from a government because we have no support or if we have some support, this is very little. The minimis program wasn't open for our sector till now. Last year due to lock down people stayed at home and turnover become less more than 20% in our sector. Now we are like a disco club, because one week is open and after two weeks, they have to stay close. And the other center actually are open and working. But when people are trauma, it's not easy. And I think this is for all of us not only for my country, but the situation is like this. We have some indication about a better season now. But also since Monday, we expect lockdown again and nobody knows what exactly will be locked out. For agricultural purposes people which are involved workers, and so on, people are going to work regularly, but I really hope that this lockdown will be finished, and we can make our normal life together.

I wish to mark something about the program Multi. we are one of the countries which participate in this program. And at the moment, we are not so satisfied because this program is not focused on each country. And we have some differences. At the moment, we are not treated like a partner. We are treated like associated participant. But let's see. I hope this program will be good in April, when will we start. And we'll be focused much more on ornamental plants and not only in cut flowers. This is our opinion as Association. We had our assembly last Sunday. And we were working to have a meeting physically with our members. And we really hope that lockdown will be finished.

Czech Republic

There are two to three groups of people. One says NO - we need first green woodlands and green village - planting extra-vilan, second part says we need green cities - green roofs, green walls, green

intravilan. We created together a new standard for green facades with Association for the Establishment and Maintenance of Greenery, I know that is very important. Third group - we need all. Now we work and create new rules for planting and green of extravilan - Agroforestry.

Denmark

The garden centres were locked down in January, February, but was opened again the first of March, with no restrictions. Sales are good at both the amenity market and the garden center market. The news about the shortage of plants for garden center hit the national news last week, for five different media's newspapers calling me and would like an interview about the lack of plants. So that's good. The shortage of plants can reduce our turnover in the end of this spring. But we are not worried yet. Not enough plans at the market.

Finland.

We have pretty much the same situation, what we heard from Denmark. So last season was really strong, both in garden centres and landscaping, both of them were running really well. And it was mainly because the restrictions that the people were not allowed to travel, they stayed home and spent a lot of money in a home garden. And at the same time, so the garden centres reopened, so we didn't have total lockdown. But for coming season, it looks still promising. The only risk is if we have to lockdown garden centres again. But I think that's not what we are facing at the moment. And the second thing is availability. So we are running out of the plants also here. So probably, that might be the risk for the bigger turnover, that we don't have enough plants on the market. And the third thing is season labor from the third countries might be an issue. So probably we don't have enough people to do the work in the nursery; it might be harmful for the business. But otherwise, it looks pretty promising.

France

We are on curfew, generalized between 6pm and 6am. Commercial areas are under lockdown on weekends. So extreme north and south east of France, as maybe you know, all commercial areas of more than 10,000 square meters cannot open except for food. What is a point of concern for us is that in France, right now, trade of flowers and plants is not considered as one of the essential activities according to French authorities. So there is still a risk of closure in case of lockdown. So concerning the sector right now, at that time, market is rather good. But there are severe interpretations, by local authorities sometimes, and with real impact on certain garden centres that close. And we are very worried because sanitary situation in France is not good at all. And we're expecting a new containment in the Paris area. An official announcements should be today, and we don't know yet what is going to happen. For landscape activities situation is rather good, except for public markets because are not very dynamic. And to end, growers in front are still waiting for effective mechanism of support for government related to the last spring crisis. Everything is more or less open and the market is good, but still we have a big factor of risk with a decision of the authorities. In the landscape market we are we are looking for salaries you know every year for lack of a better term salaries and the lack of plants it's a

great problem. Contractors working in private garden have plenty plenty of work, it is just incredible, like swimming pool as well. In public affairs is quite slow but you know, very fashionable trees and it's it's a good job for us because our every big town is asking for trees, trees trees, that's just incredible. We have much much work. We're waiting for the next step because has a manual said we have just wondering what will happen tomorrow. There was no lockdown and in the landscape market, it was in the garden center. Now, yes. Just a few a few days last year in spring, but not more.

Germany.

My first impression is the telephone in my office is not ringing so often. So the nurserymen are all at work. The retail market: we had the situation in Germany, you know, in some German countries, they will open the whole time during the winter. In other German countries, they were closed but now all garden centres are open. And I think we reach it we did a good job in lobbying because our chancellor and the Prime Ministers of the countries said okay, now the garden centres, the retail shops of the nurseries, they are shops of daily needs. And so, we can open like the food shops, you know, the other retail shops in Germany are still closed so I think that is a very good situation for the suppliers of the garden centres. In the landscape market it's the same like in other countries the situation is good. Landscape contractors came to me and said it's a traumatic situation. We can't get any trees from your nurseries. So that is also the impression we have a lack of plants in Germany. And of course, we see the prices are rising. And yesterday, a landscape constructor, phoned me and said, yeah, we see that the German nurseries, they are rising the prices, what about the colleagues in the Netherlands? they are still lower. So there should be a movement to rise the prices in the Netherlands too. So perhaps that's a little appeal to the colleagues of the Netherlands to rise the prices. So that is, I think a good situation. We have in Germany, of course, beside the corner debate still the issues of climate change are in mind of the people here in Germany and so if you look at the future it will be the next months and years a good situation for our sector. The garden centres are profiting from the cocooning situation in Germany and I yesterday I was visiting a very big grower of container plants. So they are all ahead of sales. Garden Centres have been closed in January or February about the main season was starting in March and hopefully they will stay open even if other shops are closed. You only can buy in supermarkets and pharmacies and so on, but for the normal shops you make appointments in some of these areas. Also traveling is still difficult and restaurants are closed. We have to take profit of this situation for the landscape market. Landscape market is also good and there's a lot of work. For the price situation, I have to add that the Netherlands did a good job increasing their prices quite a bit, when you buy young trees at Opheusden last summer this was five or 10%, which you maybe can raise your prices. The garden centres started to raise their prices 20, 30, 40, 50% and this also the German growers had to follow. This was a stat given by the Netherlands. The Dutch are more clever than then the German sometimes in increasing prices I have to say chapeau, but in competition you are also very good in the Netherlands, so the situation is good. The situation is good. There is a shortage of plants in some of the plants. I didn't hear that not enough trees, but we got shortage of the 'future trees' because 'climate trees' are rare and there are not enough on the market. But for the most of the trees we still have enough in production and prices are increasing in Germany. The situation at the moment is

good. And I have the feeling also for the next autumn and spring we hopefully will also have a good situation.

Greece

I'm very glad that I'm showing you one of the situation is almost the same as Germany and France I suppose. We have a complete lockdown in all market except the food market and of course the retail market. The retail market is working very well. The garden centres work enough even if they are close, although someone can take the plants but you can't deliver order. The big problem is in cut flower. We are not very optimistic about the next two months.

And unfortunately we will be again in a lockdown situation until at least our Easter which is in second of May. We cannot see what's going on if something better does happen. Because everything is rising up about COVID and we have more infection more dead people unfortunately. So about the garden centres as I told you they have worked. The retail market has work. The cut flower does not work. The landscape architects and designers do not have a lot of work because many people do things by themselves. They won't ask to improve something because they are all afraid to pay. They can buy supplies They can produce by themselves, maybe with seeds, everything they do it yourself. Market goes perfect, is better than last year. We all expect the big work we have here in our coastal area which is the biggest park in Europe. It started, not with a planting but with other works inside. The Greek production has lower prices now. The imported plants are more expensive. We will need plants on this park. So I hope next year not this year, hope next year 2022 we will start order and produce plants for this park. This is a situation here, we'll expect this park. Therefore, they were careful because we don't have so much nurseries as your countries have. We have program about this. It's a huge park, about 1 million shrubs and 30,000 big trees, so it's a huge project.

Ireland.

Last season was very good started off quite difficult with lockdowns, but as the year progresses it was a good season for everyone here. It's very difficult situation now in Ireland, we're currently we're still in level five. So, the most strict lockdown restrictions in Ireland. Lock to be reviewed on the fifth of April both very unlikely that much will be changed. So as it stands here, garden centres cannot open unless they're selling some other essential items such as fuel or hardware products. So, it's mixed, some garden centres can open some can't. The landscape sales, effectively construction is still shut down and landscape only for essential jobs. So the landscape sector is effectively shut down as well. And like Finland said labor is going to be a key issue. Even if we get open run and hopefully in the next few weeks, seasonal labor will be an issue for Ireland. So we're hoping that garden centres will reopen but labor will definitely be a concern for us.

Italy

The situation is similar to all the other that we've heard at the moment. In Italy, we have divided regions in colour, depending on the level of infection of the area. And when you are in red colour the garden centres in this area are closed. But the nurseries are always open. In every situation has

been, they remain open. And landscape workers never stopped. The market is very stronger. And I confirm the sensation from all the other countries that the plants are missing, in particular trees and sometimes some product of little bushes. Personally I haven't still seen an increasing in price. So I can tell you that the plants are missing and I think that they are going to miss for a few times; it's not a problem that we are going to resolve in one season. And I hope in any case that the price should increase because in the last 10 or 15 years the price never increased in a reasonable way, how the labor price as increased, so now it's time to increase the price of the plant in order to, I think, do compensate all the inflation that we have had this last 10 years. About the infection, we have permanently divided in region, the area are open and closed, open and closed. We're moving from one month to another one. And I think that I believe that this situation will keep going until the middle of the summer hoping that vaccination, that is still the starting now in Italy in a serious way is going to changing something.

Netherlands

Thank you to Germany for the compliments earlier on. We have a board meeting this afternoon and we will send an email to our members to encourage increase the prices immediately. There's also told about shortage of a lot of products. So that's a good thing in that way. The landscapers can't do the jobs, they have lack of people who can fill in all the positions. So that's also a problem. During the COVID, I can say our Government is supporting companies who are suffering from turn over loss very well. So that will be taken care of but in general, the growers in the Netherlands are doing well. We are facing earlier this year some problems during Brexit; it wasn't mentioned yet here. And at the moment that's been taken care of. But it's still a lot of concern to companies to provide the needed information to export to the UK. And also, we are facing problems to export to out of the EU, especially to Russia. The governments in the EU are not doing the same thing together as they say they are doing. Brussels says we do all the same. But separately, each country is doing his own thing to provide export to Russia. And that's why we have some difficulties to get our products into Russia. I think that will be a short manner. The garden centres are partially opened in the Netherlands. And we are hoping that after Easter they can go open full. So that will be a slight concern. But everything is selling well.

Something that is really a little game changer with the COVID situation that a lot of people discovered, one good thing is that they discovered their garden, and they spent more money to the garden. But they also discovered that they can buy plants online. And that is enormously increased in the Netherlands. And we have some customers all over Europe who have workshops as well, who also has an enormous increase of their sales that might be a little game changer for the future. And we'll probably be taking a bit of turnover away from garden center for the future. I think that's something that's also a side effect of the COVID situation.

Poland.

It seems that it's the same all over the Europe. So our sector goes very well. We have mainly two problems now. One is workers on quarantine. So a lot of people a lot of workers from companies goes for or quarantine for 10, 15 or 17 days. So we lack of workers and we lack of plants. We hope

that this lack of plants, specially trees, will teach our landscape contractors to order plans before the last day they do the jobs because some companies need to, for example, to plant 200 trees in the city, they have to add it in two weeks and they start to look for trees yesterday. So I think it will change the way of ordering and preparing to do the business; I think it will be the help us in the future. But generally, the situation is comical, quite unsure because until now the economy goes well. But the government supports for a few weeks or few months and we cannot see if there will be some money left after it for companies, for our customers, for people. So we are not sure about the economy at the end of the year and the next year. For now it seems quite good. The nurseries are open all the time, garden centres also working all the time. But for example, from Saturday we started a new lockdown and we are not sure how long does it take so it's another unsure think for us. quite similar.

Portugal

We have a second lockdown in January. So we are a step ahead of the year. Last year was a good year, because after the first lockdown in March, in May the Garden Centres we're opening and people discovered gardening, and plants sold very well. The government created a credit line about € 20 million, that arrived too late, only in October, and we think that only 1 million was found with this credit line. We have also access to layoff, but in our sector there is work so our companies don't use that help. In 2020, our exports have increased. That was good. However, we have cut flower with great losses, they suffered a drop more than 30%. For this year, our companies reduced a little bit their production. Although with the lockdown the Garden Centres and Florists remain open, Portugal was closed. So it didn't help very much. We are afraid of the future. Because we little country we have a really great economy problems in the disease. We are in a bubble. So after this bubble explodes The future it's scary. I think the real crisis has to come yet.

Serbia.

The same situation as some countries we have heard today. The garden centres here in Serbia were open but from week to week was changed, lockdown or open. Now visits are very complicated in Serbia for COVID. But in this year 2020 the landscape markets continue working and landscape projects have been working as normal. Garden center were opened. But there were not significant work for all of garden center. Some of them open online shops or delivery and they work very well. As in some other countries many people remains at home and so they use the gardens. And we will see what happen in this part of the year.

Some companies went to the Chamber of Commerce and they wanted to open the flower shops, because they are close. It is not really our business but it is somehow connected to all of us. Because flower shops are mostly closed, 25% of them is closed. And a lot of them will be in future because there is no exhibitions, or hotels don't buy flowers, things like that. So their businesses is really, really big problem. And they wanted to open them with the new measures that the government they took, but they rejected it, and they must stay closed for next seven days. And we expect that this will last much longer because, my opinion personal, is that we have a lot of people that got vaccines, but most of them got COVID after that because they relaxed and they didn't care anymore.

So a lot of people got COVID after vaccines in very short time, for example two weeks or three weeks, because they feel like they're safe but they're still not so we still have a big increase of infected people. Now we have new measures, but for garden centres they're still open. Only the ones that are in closed spaces have a problem because only nurseries that work on the open space can work. In mostly every part of Serbia garden centre is on the open space, only in Belgrade professional garden centres are in a closed space so they have problem; and they are mostly traders, they are not nurseries. Nurseries work normally and that is 95% of garden centres in Serbia. So for now situation is okay, season is going good, and I can say that the sales are higher than last year but we don't know what's going to happen in the next few weeks. I hope it is not going to be stopped.

Spain.

We expect a normal campaign, we hope to continue the trend of the end of the last season because it was very good. We had a very bad beginning of the season because of the lockdown. We had total restriction on mobility and garden center, flower shops and other building that sell plants were close. We couldn't purchase any plants. But the rest of the campaign was very good because Garden Centres were opened, and we could make our export. For this campaign we expect normal purchase, although it depends on the current restriction because we continue with restrictions between regions. In the beginning, the purchases, are going very well, garden centres, DIY, and flower shops are open. So, we expect a normal good campaign. We also realized that the pandemic has increased significantly the interests of consumer in plant, both in house and at home and for the garden. And we have an extra

motivation because we suffered in January a storm, Filomena, that was very painful for our plants and the people had to replace the plants. So, in general, we expect a very good season, but we will see.

Sweden.

We had a good season 2020 (really good for garden centre and stable for landscape). We haven't had any lock downs. But we have tougher restrictions now regarding shops, but everything is opened. The start of this season has been good and we hope for another good year. Like other countries we don't have enough plants. In Sweden, we have another approach to COVID and the rest of Europe. So here is business almost as usual. The sales in the retail were very good last year. And the forecast for this spring is also good. The landscaping market is strong as before, and the forecast is still strong for spring and autumn. So we have a big shortage of plants of course.

Switzerland.

Our sector is also going well, already since last year, the losses from the lockdown in spring 2020 could be more or less recovered in the course of the year. And some even achieved an above average annual result. At the beginning of this year, we had also a lockdown, a partial lockdown in January and February for six weeks. Shops have closed, but garden centres and Do-It-Yourself stayed open; only the restaurants had to be closed. And I think this situation we owe especially to the good lobbying we had last spring for the plant sector. We could not buy clothes or shoes, but plants and

flowers were classified as basic needs. And of course, we are really happy about this. This year, the spring season has already started in February. It was very warm. And we expect a good spring season. Everybody can work, landscape and retailers. Everything is open. And we expect the good and the normal season.

United Kingdom

The situation in the UK with COVID were moving to a point where we have our roadmap out of COVID restrictions. So on the eighth of March, children went back to school and gradually things again, start opening up hopefully. I think now over a third of the population in the UK has had a vaccine. And hopefully on the 12th of April, General shops start opening as well. The situation with gardening at the moment, every sector is doing very well gardens and doing well container production and tree production, with shortages across the board. And I think the shortages are driven by quite a few things, I think we had very strong autumn, which took a lot of stock out of the system early. I think sales have started very, very early, and we're pushing as much stock out as we can. And there's a massive interest in gardening at the moment. Still, if you want to go out and go shopping, you can either go to the supermarket or the garden center, so lots of people are gardening. And I think also we've got a cold, early season with low light levels. So a lot of the plants would expect to be starting to come ready, maybe two weeks delayed. So stock is a little bit late, everything as soon as it comes ready for sales is disappearing and that's causing us some problems at the moment. We just don't have enough plants to put into garden centres and every garden center is saying the same thing.

I think as well last year, a lot of people didn't propagate stock through the first lock downs. So there are stock shortages coming through which we were unaware of. We're hopeful have a very good season. But I think we're going to be impacted by shortage all the way through the year now. And much I hate to mention Brexit, I think that's causing problems as well with bringing plants in. And whilst there's still a good flow of plants in the UK, it's just a headache, every single input channel.