



EUROPEAN NURSERYSTOCK ASSOCIATION

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Minutes of the ENA General Assembly Meeting held on 21st June 2016 (15:10 – 19:25) at Metropolitan Hotel (Brussels room) – Sofia (Bulgaria).

Present: Henk Raaijmakers (LTO - Netherlands), Jan Veltmans (LTO - Netherlands), Zoran Miladinović (SLH - Serbia), Milka Glavendekić (SLH - Serbia), Milan Topalovic (SLH - Serbia), Zoltan Sinkó (NdDE - Hungary), Heinz Kunz (Jardin Suisse - Switzerland), Henning Roed (Danske Planteskoler - Denmark), Sotiris Mamos (HEPMEA/ESEFY - Greece), Grzegorz Falkowski (ZSzP - Poland), Mateusz Milczyński (ZSzP - Poland), Edoardo Sciutti (ANVE - Italy), Maurizio Lapponi (ANVE - Italy), Markus Guhl (BdB - Germany), Jan-Dieter Bruns (BdB - Germany), Maja Persson (LRF-T - Sweden), Arttu Haverinen (T - Finland), Val Farrell (IHNSA - Ireland), David Brown (HTA - United Kingdom), Jaume Riera (FEPEX - Spain), Tatyana Boyadzhieva (BAOPN - Bulgaria), Nele Lauwers (AVBS - Belgium), Albano Moreira da Silva (APPP-FN - Portugal), Mina Tsonkova (BAOPN - Bulgaria), Marc Van Hulle (AVBS - Belgium, **Legislation WG Chairman**), Leon Smet (ANTHOS -Netherlands, **Plant Names and Promotion WGs Chairman**), Willy De Nolf (AVBS - Belgium - **Treasurer**), Patrick Svensson (LRF-T - Sweden – **Vice-President**), Tim Edwards (United Kingdom – ENA **President**) and Josep M. Pagès (ENA SG **Secretary General**).

1. President's Welcome.

President Tim Edwards opened the meeting welcoming all the attendants and, directly, Mr Tsvetan Dimitrov, Mr Tom van Oorschot, reminding them that ENA applied for the "Green City" promotion program.

2. Welcome speeches by

Ms. Tatyana Boyadzhieva, Vice-President of BAOPN, welcomed all participants and highlighted the importance of working as a team to cope with common problems and to share knowledge of the nursery industry, looking for the best plant quality. She concluded by advocating greener cities in Europe.

H. E. Tom van Oorschot, the Ambassador of the Kingdom of the Netherlands in Bulgaria, stressed that the urban agenda is a priority for the Dutch presidency of the EU, and highlighted implementing green cities as especially important because by 2050 up to 80% of the population will live in cities. He added that nursery sector is important for both Bulgaria and the Netherlands and he mentioned that they have already been working for the Green City Bulgaria in cooperation with Dutch and Bulgarian organisations.

Mr. Tsvetan Dimitrov, Deputy Minister of Agriculture and Food of Bulgaria, thanked the invitation on behalf of the Ministry, offered the full support to the nursery sector and committed to have a meeting with BAOPN in the next week. He explained that nursery production is a relatively new sector in Bulgaria and that the trend is very positive as they have good knowledge, good climate and the support of the Plant Research Institute with a large plant collection. He emphasized the importance of the Green City strategy for the benefit of the citizens and the environment, protecting the



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biodiversity in the cities and helping to mitigate climate change and ended by wishing success to the General Assembly.

President Tim Edwards thanked them all for their recognition of ENA and for the appreciation of the Green City initiative.

3. Apologies for absence.

Elaine M. Farrell (Ireland), Olav Folkvord (Norway), Ronny Berdinesen (Norway), Nikos Thymakis (Greece), Harm Horlings (the Netherlands), Emmanuelle Bougault (France), Jean-Marc Vasse (France), Laurent Chatelain (France) and Caroline Föllmi (Switzerland) had sent apologies.

4. Agreement of the Agenda.

The agenda was adopted.

5. Minutes: approval of the minutes of the previous GA meeting held on on 28th January 2016.

The minutes from the last General Assembly meeting held in Essen on the above date were approved and agreed as a true and accurate record.

6. Matters arising from the minutes not included on the agenda.

The Secretary General commented, in regard to ENA finances, that the income and the expenses were within the budget, that ENA had been registered for VAT in Belgium as a “small entity” and that if ENA gets the grant for the promotion program ENA should register for VAT as a regular company in 2017 because that would involve great economic movement. Nele Lauwers (AVBS – Belgium) confirmed that the accounts had been officially filed.

SG informed the GA that most countries had paid their membership fees for 2016 and that he will send a reminder to the pending ones.

7. ENA EU Legislation WG:

The President gave the floor to Marc Van Hulle (AVBS - Belgium, **Legislation WG Chairman**) explaining that it was decided at the Secretaries meeting to have a coordinator for each of the items this WG is dealing with, under the guidance of Marc Van Hulle.

a. Plant Protection Products.

Marc Van Hulle (AVBS - Belgium, **Legislation WG Chairman**) framed the problem and volunteered to contact Dr Bruno Gobain, chairman of the Commodity Expert Group ORNAMENTALS, about the work done for the Nurserystock subsector. President Tim Edwards summarized that there was a proposal from the Spanish organisation to create a WG and that, after the secretaries meeting, it was identified that an official “minor uses co-ordination facility” had been established a few months ago (Commodity Expert Group ORNAMENTALS)

and is chaired by Dr Bruno Gobain (www.minoruses.eu). It was agreed on to ask for a summary report, once a year, on the situation of PPP for nursery stock.

SG added that the expert group's aim is to advance on national registrations, sharing information within the group to get more registrations and to optimize trials in different countries. He also explained that a number of countries, and even ENA member organisations, are already active in it (BE, NL, PL, FR, SE, ES, DK, UK), that they would greatly welcome participants from new countries and through ENA organisations they might be proposed. The expert group meets twice a year, with the next meeting scheduled for September 27th and their expenses are covered. He finalized offering ENA to send the PPP needs of the nurseries to the expert group.

President Tim Edwards repeated that he is trying to rule ENA efficiently having most discussions before the GA and to put proposals to the GA. He summarised the proposal on PPP asking the opinion of the participants and it was agreed on moving forward in this way.

b. Future EU Plant Health Regulation

Marc Van Hulle (Legislation WG Chairman) informed the GA that Mr Harry Arijs -Deputy Head of Unit PLANT HEALTH, European Commission's Health and Consumers Directorate-General-, was invited to the last ENA Secretaries Meeting in Brussels, and that the EC expected to have the Regulation adopted by the end of this year, after the political decision process in the Council and the European Parliament. He highlighted that all plants will need Plant Passport within the trade but not for the final consumer and that the PP will have to travel with the plants, not with the documents. He added that the delegated and implementing acts to be adopted pursuant the new Plant Health Regulation should be open to consultation from the 1st of July in a web portal of the EC and encouraged everyone to act to it within 1 month.

President Tim Edwards remarked that Mr Arijs considered ENA as the most relevant organisation in regard to the new Plant Health Regulation and encouraged the delegates to reply to the formal proposals offering ENA to convey their opinion to the EC.

David Brown (HTA - United Kingdom) added that on the 24th of July, a final document will go to the European Parliament for discussion and that if it's adopted, it's likely there won't be many changes, the main issue being the imports/exports in the EU. He added that 70 parts of the Regulation will need to be implemented, over the next 2 years, and those will offer opportunities to express our opinions.

In this issue, it was agreed on that the objective of ENA must be to keep members informed, to ensure that ENA is included in the consultation process and to coordinate the consultation output.

c. *Xylella fastidiosa*

Marc Van Hulle (Legislation WG Chairman) referred to the GA what Mr Harry Arijs explained and pointed out that the EC is very concerned about this disease and that this is the most important issue in plant health at the moment. SG reminded that ENA has been sending updated information to all members, including the modifications of the EC Decision, relevant new outbreaks of the disease, Demarcated Areas and host plants list updates. Tim Edwards remarked that the goal of ENA is to keep members informed of the current situation. Edoardo Sciutti (ANVE - Italy) shared some updates: The Apulia region reached a financial agreement to control the DA and buffer zones and ANVE asked for controls outside the buffer zone in the whole Apulian region. He reminded the GA that the EU Court of Justice ruled that the EC decision was legal. They expect that the court of Lecce will remove the prohibition to cut old olive trees very soon. Outside the DA, Italian authorities are monitoring the entire country and ANVE fully supports the EC decisions.

Marc Van Hulle asked about results of the research and Edoardo Sciutti explained there are several research groups working on it but there are not results yet. ANVE is participating in a French group that applied for a H2020 research grant and is lobbying to have some on nursery stock because most research is done on olive trees.

Jan Veltmans (LTO - Netherlands) informed the GA that the Netherlands made an advertisement campaign based on the potential danger of the disease and advised to take care of tourists bringing small plants from the DA. David Brown (HTA - United Kingdom) emphasized the importance of informing supermarkets and distribution chains and informed it is being done in the UK. Henk Raaijmakers (LTO - Netherlands) remarked that distribution centres of the great chains (like ikea, lidl, aldi) are controlled in the Netherlands and they are surveying the distribution centres.

Val Farrell (IHNSA - Ireland), insisted on putting pressure to each country's Ministries of Agriculture to inform about the risks to nurseries, garden centres and retailers. Albano Moreira da Silva (PT) discussed a potential problem that might happen in Portugal because of the legal system that could avoid eradication, as it happened in Italy. Markus Guhl (BdB - Germany) notified the GA they have an information campaign with the ministry addressed to nurseries, garden centres and retailers, including the big companies like Ikea.

d. EU Fertilizers Draft Regulation

President Tim Edwards explained to the GA that this was a new topic, raised by the Netherlands, and reminded the GA that ENA's mission is to help with any concerns. The problem with the new regulation proposed by the EC is the requirement on biodegradability of the CRFs (Controlled Release Fertilisers) coating agents that is technically impossible to fulfill. SG informed the GA that **ENA reacted to the Draft Regulation open consultation**, as many ENA members did (PL, NL, BE, etc.). The aim of this topic was agreed on: **to observe the**

regulation changes and to be sure we can react, in coordination with Fertilisers Europe organisation. Ms Helma Hoff had volunteered as coordinator for this item.

Henk Raaijmakers (LTO - Netherlands) gave his opinion that it's an important issue for other agricultural sectors, such as strawberries and other fruit and vegetables growers, and suggested to influence Copa-Cogeca, using economic and environmental arguments to support the industry. He added that, for now, we have to wait and he advocated for all of us working together asking the same. Edoardo Sciutti (ANVE - Italy) explained that they had been in contact with the Italian Ministry and suggested involving the authorities in each member state, putting pressure at the national level.

e. Combined Nomenclature.

Marc Van Hulle (Legislation WG Chairman) thanked Edoardo Sciutti (ANVE - Italy) for his job on the CN codes and proposed to wait until the beginning of 2017 for the data collected from 2016 using the new CN codes. It was agreed on to look for the 2016 information early next year and to analyse the data to be discussed at the 2017 summer meeting.

f. IAS (Invasive Alien Species).

Marc Van Hulle (Legislation WG Chairman) mentioned that Helma Hoff (NL) encouraged us to take action on this item and said it's a great threat for all of us but also an opportunity to plant other varieties.

President Tim Edwards adverted that the EU list is likely going to grow longer and asked the ENA delegates to lobby their own member state's authorities. He also defended a strong cooperation with COPA-COGECA in this issue. SG explained that all comments received from ENA members had been sent to COPA-COGECA, to Ms Christianne Möllhoff, but she left Copa-Cogeca and now the contact in regard to this issue is Ms Oana Neagu (General Affairs Director). SG explained her suggestion of pushing authorities at the national level because most proposals of enlarging the first list of species of EU concern -that is going to be published very soon-, are coming from the member states.

Markus Guhl (BdB - Germany), commented about the dangerous mechanisms to add plants to the EU list and the pressure and influence exercised by the environmentalists. Jan Veltmans (LTO - Netherlands) explained that species may be easily added to the list by just two member states, but a qualified majority is necessary to remove any specie from the list. He added that a lot of problems on the implementation and the control of IAS are expected because they wouldn't have the capacity of eradication. Henk Raaijmakers (LTO - Netherlands) supported the warning and complained that environmentalists use TV and media demagogically alerting about IAS and remarked that two EU members were enough to add a plant on the list and then the whole is voted on but it's very difficult to remove a specie from it because lots of information based on research is needed.

Grzegorz Falkowski (ZSzP - Poland) was told that most proposals came from the UK, because they were prepared to report on the impact while other countries were not ready. He advised the delegates to identify the experts from each country participating at the committees and to inform them about the importance of keeping some species out of the lists, i.e. *Acer negundo* to be used as rootstock. Many delegates expressed their concerns on the way the EU list was implemented. Marc Van Hulle (BE) asked if using the ZP -protected zones- system, as in plant health, would be useful to control IAS and, finally, Maja Persson (LRF-T - Sweden) explained they are making recommendations to nurseries to avoid IAS and use alternatives.

It was agreed to contact the European Commission to express the worries of the nursery stock sector and to ask them to take a second look at the Regulation and review its practical application, because different management prevention strategies should be applied at different stages of the invasion by alien species. It was noted that the inclusion in the Union list of species that have been grown for decades won't effectively prevent their adverse impact. It was also approved to cooperate with COPA-COGECA in this issue and, finally, the delegates were advised to interact with the national experts of the Committee, the Scientific Forum and the Working Group on Invasive Alien Species from each member state.

8. International Plant Names List Working Group update.

Leon Smet (ANTHOS -Netherlands, **Plant Names WG Chairman**) reported that, as ENA members were informed some weeks ago, the two plant names' lists -woody and perennials-, with input from the members of the WG, had been published. Leon Smet reminded the GA that the books are available and proposed anyone needing more information to ask Leon or the SG.

President Tim Edwards thanked Leon Smet and asked to thank Marco Hoffman for the coordination of the names lists.

9. ENA Promotion Working Group.

The President Tim Edwards thanked Leon Smet (Promotion WG Chairman) and all the WG participants and Leon Smet informed the GA that ENA is waiting for the result from CHAFEA (the EU Consumers, Health, Agriculture and Food Executive Agency) to the application "Green Cities for Europe", presented late in April with 8 ENA countries participating and financing it -around 150.000€/year-. It's a 3-year program focused on B2B promotion of the importance of green, although each country has its specific program of promotion and budget. It's expected to hear about the approval next October and, if it's positive, to start at the beginning of 2017. During 2016 ENA is working on the executional and administrative organisation, including outsourcing companies which was already done for the application. Leon Smet remarked that the impact of the campaign will be for all countries, not only for participants.

There were no questions from the delegates and President Tim Edwards commented that the French organisation (Val'hor) played a very significant part on the group, although they were not able to attend the GA meeting, and finally thanked Leon Smet for the work done.

10. To discuss the proposal from FEPEX (Spain) of including the whole ornamental sector (cut flowers, pot plants, etc.) in ENA.

President Tim Edwards reminded the content of the letter received from FEPEX -the Spanish ENA member-, already commented at the last GA, and added that at the last secretaries meeting it was agreed on submitting to the GA the Spanish proposal of enlarging ENA to include other areas of interest beyond the nursery-stock, such as cut flowers and other areas of horticulture. He added that ENA was created mostly because nursery stock was not represented anywhere by other organisations, informed to the GA that Jaume Riera and Josep M. Pagès were the delegates from FEPEX and that Josep M. Pagès recently resigned, but he will continue working for ENA as SG and having only one role in ENA. Jaume Riera (Fepex – Spain) introduced the Spanish position and boldly defended their arguments.

Albano Moreira da Silva (PT) remarked that their association includes all types of plants and cut flowers growers, but he argued that the flower sector is internationally well represented and that it is much more powerful than nursery stock sector. It was noted that the organisations from the Netherlands, France, United Kingdom and other countries are also representing those sectors but they use other international organisations such as COPA·COGECA, AIPH and UF. Marc Van Hulle recommended to FEPEX to become member of Copa·Cogeca or of the other organisations because ENA is for nurseries only. David Brown told the history of the creation of ENA: it was born as a subcommittee within the COPA·COGECA Flowers and Plants Working Group because the nursery stock sector was not having enough voice inside the general WG.

President Tim Edwards summarized, and the GA agreed on, that other areas in horticulture are covered by other international organisations and that ENA must concentrate its efforts on nursery stock, although it's not for ENA to recommend to FEPEX what they should do in regard to the other organisations in the sector.

11. ENA 25th anniversary organisation.

President Tim Edwards introduced the project of planting a tree in each country member of ENA on 19th October 2016 to celebrate the 25th anniversary and polled the participants around the table for the state of play in each country to have a tree, a site, a date and an organiser/coordinator:

- **United Kingdom:** working on it, several places had been identified and they have the organiser.
- **Belgium:** working to have a tree planted behind the European Parliament in Brussels and, possibly, to have a little ceremony inside the EP. They already have a tree supplier and AVBS is going to coordinate the event.
- **Portugal:** they have the tree and there are plenty of mayors interested in hosting it; they are having a contest to know which is going to give the best output.
- **Poland:** it's decided to buy the tree, they are working on the place and the date will be the projected one.

- **Netherlands:** they will use the “Tree of the Year” campaign and they are aiming on planting the tree in The Hague because it is the seat of government.
- **Serbia:** The Society of Ornamental Horticulture of Serbia, in honour of the 25th Anniversary of ENA, already planted the tree in Belgrade (BeoPlantFair) on April 9th 2016. They might plant another tree in October.
- **Hungary:** the tree and the planting company won’t be a problem and they are looking for a place. They are confident on having the ceremony on the 19th of October.
- **Switzerland:** they’ll plant a big specimen of *Quercus robur* on the 2nd of November, because the suggested date is a holiday and the politicians would not participate. The ENA President was invited and will try his best to be there.
- **Denmark:** everything is ready to plant the tree in Odense.
- **Greece:** they have the place and the tree and the ceremony is being organized with the city.
- **Italy:** they have the tree and they are waiting for the reply from the Ministry in regard to the place in Rome, the Ministry or the Parliament.
- **Germany:** they have the tree and they expect the Minister to plant the tree.
- **Sweden:** they are discussing about the tree that will be planted in Malmö, organised by LRF-T.
- **Finland:** they have arranged the tree and the planting in Helsinki.
- **Ireland:** they have the tree, a couple of sites are under discussion and, as they have a new government, they haven’t yet decided how to do it.
- **Spain:** it’s not been decided on the place nor the tree, but the delegate compromised to do it.
- **Bulgaria:** they are working with ceremony details with the authorities, probably not in Sofia but in Plovdiv, Burgas or Veliko Tarnovo.

It was agreed to e-mail members who were not present, informing about the event and asking for the details on the arrangements in their countries. The SG will prepare a document with the entire information, will share it with all members and will prepare a general press text to be used for the members. Leon Smet (Promotion WG chairman) added that he prepared a general press release on Green City that could be used for this purpose too.

12. Election of President, Vice-President and Treasurer.

Following the election procedure stated on the articles and the domestic regulations of the Association, the President Tim Edwards proposed the Secretary General Josep M. Pagès as Chairman of the Voting Office and the GA agreed. SG announced that Tim Edwards, Jan-Dieter Bruns and Willy De Nolf put themselves forward to serve as President, Vice-President and Treasurer respectively. SG asked the GA if there was any other nomination but there wasn’t. Voting by raising hands separately for each position, they were all unanimously elected. Finally, and according to the articles of the Association, the new elected President Tim Edwards proposed to renew Josep M. Pagès as Secretary General and the GA unanimously approved him.



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The President and all the participants thanked Patrick Svensson for his good work as Vice-President for the last two years and congratulated Jan-Dieter Bruns on taking the honourous position as Vice-President.

It was agreed on delegating to Nele arranging the formalities to officially register the board of directors' changes.

13. Date and Place of the GA next winter meeting and summer meeting 2017.

It was agreed on having:

- the General Assembly winter meeting on Thursday 26 of January 2017 at 09h30 at IPM – Essen (Germany)
- an ENA reception for nurserymen on Wednesday 25 of January in the afternoon at IPM – Essen (Germany), offered by BdB, the German organisation, which was effusively thanked by the President.
- the General Assembly summer meeting in Tampere, Finland, on dates 25 to 27 or 26 to 28 of June 2017. Arttu Haverinen (T - Finland) got the confirmation from the GA that flying on Sunday would not be a problem and he said they are going to have companies sponsoring the event.

The President Tim Edwards asked for ideas for the summer 2018 meeting place. It was agreed on producing a list of places where the summer meetings had been held. It was mentioned that the UK might be an option.

15. Press release.

It was agreed on highlighting the presence of the Bulgarian Deputy Minister of Agriculture and the Ambassador of the Netherlands, mentioning ENA is looking for the grant for the “green city”, Invasive Alien Species, the Elections and some information about Bulgaria.

16. AOB (any other business).

- a. Milka Glavendekić (SLH - Serbia), raised a question about vine grafts that are produced in Serbia but are not able to be sold in the EU, even having the certified propagative material and the RS legislation harmonized with the EU. She asked for help on how this product could find a way to be imported in the EU, as it is not officially forbidden. Delegates had no information about this problem and it was decided to ask to the EC after receiving written information from the Serbian organisation.
- b. Milka Glavendekić (SLH - Serbia) informed the GA she is representing Serbia in the EPPO -European Plant Protection Organisation- WG on non-quarantine pests, a horizontal experts group on not-regulated pests. She advised the ENA members to contact the NPPO -National Plant Protection Organisation- in each country informing what pests are not regulated but still important for the nursery sector. She mentioned that *Cydalima spectabilis* spread quickly because it was not included in any warning list. She informed the GA she is participating in a Research group lead by



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INRA (France) and asked to list the economically most important pests for nurseries. It was agreed the SG will ask for it to the delegates, that will reply with the assistance of their country experts.

- c. Marc Van Hulle (BE) reminded that ENA was born as a subgroup from the COPA-COGECA Flowers and Plants WG, but not officially. He suggested, and it was approved, to remove that ENA was a subgroup of COPA-COGECA from the website, because there is no written evidence. President Tim Edwards said that relationships with COPA-COGECA at technical level can lead to a better relationship.
- d. Grzegorz Falkowski (ZSzP - Poland) invited all delegates to the conference on November 29-30, 2016, organised under the patronage of ENA, and distributed leaflets of the event.
- e. Nele Lauwers (AVBS - Belgium) asked the delegates about compensations on quarantine pests for nurseries and what measures are taken in the different countries, because from 2017 co-financing from the EU would be possible if the country asks for it. Germany, Finland and the United Kingdom have been having discussions with their governments.
It was agreed the SG is going to inform the members about these changes and to ask every member if they are working on it, what their position is and what activities are carried out in each country.
- f. President Tim Edwards informed the GA that Nele Lauwers (AVBS - Belgium) will move to the USA for a period of time and thanked her for her cooperation.
- g. President Tim Edwards asked to the delegates if they were happy with the way ENA is working, with the SG and the WGs, and the Secretaries meetings trying to move initiatives. He also asked for recommendations for improvements or other ways to address the ENA issues.
- h. Jaume Riera (FEPEX - Spain) suggested to study the trending market channels in each country and what the new ways are to arrive to the consumers. Heinz Kunz (Jardin Suisse - Switzerland) proposed to add this question to the State of Industry report, completing it only once a year. Jan-Dieter Bruns (BdB - Germany) offered to organise a meeting in Bavaria, in two years' time, with experts in the market.

It was agreed on having the full State of Industry once a year and to prepare, for the next summer meeting, a report on market channels in each country, the market trends and how the market is changing. For the winter meeting only the table summarizing the trends will be produced.

14. State of industry.

Portugal: they feel the market is slowly going up into the supermarkets; garden centres are shutting down and selling less and less plants. Next year it will be a good time for cities, because they'll have local elections, although the prices will not be good because of the contest system. Their exports to France went down and they are increasing exports to Germany.

Netherlands: big trees markets are stable but prices low; forest trees went really bad and 20-25% were destroyed; roses on the open ground suffered heavy price pressure but roses in pot sold well. Shrubs and conifers on garden centres sold well and also perennials were doing quite good.

Serbia: there was an increase in internal market, mainly internal amenity market, because the financial situation was getting better and people were buying plants from nurseries, more than from GC. Exports declined because their producers were exporting to Russia and the economic situation was not good there. They expect a stabilized situation on exports.

Hungary: first half year 2016 was ok in the production, nurseries were able to sell quite well, and production is increasing for 2nd half of 2016, GC doing well, most plants going to private people, sometimes directly from larger companies. Export market were not so well and they forecast a decline.

Switzerland: the board had not met to prepare the report. The situation is slightly improving but it's still low and difficult; gardens are getting smaller and smaller.

Belgium: spring 2016 was better than spring 2015, GC started low and they kept low. Forest nurseries had difficult problems, because it was difficult to invest on the right origins. Mail order market is going up.

Denmark: Bigger Garden Centres are doing better than smaller ones. Smaller GC are suffering because supermarkets are going up. Late planting because of wet weather. Landscaping was almost the same.

Greece: not very good, increased internal market from the islands because of the tourism and big projects. GC not doing good. They are not satisfied with the market situation, although is stable.

Poland: had a quite good spring. GC are changing structures of selling. Stable production, political problems and internal retail market slightly going up, the public investment went down and it will go down in the future. Export market was better than expected.

Italy: spring wasn't very good, flat market, maintenance only in the internal market, exports going up, but all companies trying to export and therefore prices are low. No new plantings of trees.

Germany: landscape market demand was very good, over 6 billion € turnover, prices in the landscape are too low although there is good demand. Too much production in Europe and it will lead to a change. The demand is good. The GC market is changing and nursery production is going into greenhouses and producing new varieties. The average sale's price of a plant at retail is 5-6 € including VAT, consumers are looking for lower sizes and lower prizes. GC are doing a good turnover but nurseries supplying them are suffering. The next 2-3 years will keep the prices low, but they are optimistic, the season was slightly better than last one. Exports depend on the countries, low to Russia and France -having a hard situation-, and better to others, England is doing very well.

Sweden: the demand was good, sales in both sectors were better than last year, production of bare root and hedging are going down very fast. Landscapers uses bigger trees, nurseries are selling less plants but bigger and at a higher price.



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Finland: very bad winter (-36°C) without snow to insulate plants and they had a lot of damage in nurseries but also in projects planted in autumn. They had to replace plants; on the other hand, GC are replacing plants and buying from nurseries. GC and landscapers' sales were higher than last season.

Ireland: economy is going well, and there is an increase on production but prices remain low, always lower than the catalogue price. Bigger GC are doing OK, but smaller GC not doing so well. Landscaping is up, because 50-60.000 houses per year are going to be built every year for the next 10 years.

Spain: production was not increasing, in the past many growers closed down. Consumer market was good until March, but not April-June because of the weather and the economic situation. The forecast was not good, internal landscape market slowly up. Export increasing a little bit, but it depends a lot on the situation in France.

Bulgaria: The season started earlier than usual, but there were unusual weather conditions. Late frosts in March, extremely hot April and heavy rains almost the whole May. Despite the weather, a stable growth in production figures were registered, estimated to 5 – 8%. On the other hand, there were delays in production schemes, due to unexpected rains in combination with high temperatures which results in high humidity levels. Forecast for the production: Stable, it is expected that the second part of the season will be also longer than usual and will allow nurseries to complete planned beforehand activities. Good season for the internal retail market with more realized production at the beginning and drop down in May. Most of the nurseries are satisfied in general. The rainy season in May led up to 20% decrease in sales. For the future no changes are expected. If the weather is stable and keeps its typical levels of temperature, rainfall quantities and humidity, a moderate grow is expected. In the amenity market, Due to the end of last Programming period (2007-2014) which actually ended in the last season, there were more projects running. In the first half of 2016, there are less public procurement procedures and visible drop down in amenity market demands. It is believed this tendency to be the same. Same levels as the first part of the year are expected. There are not big changes on the export market.

United Kingdom: in each country is different because the system to give grants to forestry and woodland projects is different. Scotland had no grants and it was a problem for Scottish nurseries. GC: they had great hopes at the beginning but the season was not good until May, and only May and 1st half June were good because of the nice weather that time. They rely on the weather for good sales in the Garden Centres. Supermarkets are going up and their expansion in this market is very fast. They want to supply to 20% of the market and they will probably reach it. They have a reduced number of plants supplied, making unsophisticated buying. Landscaping had a good demand, although they felt uncertainty because of the risk of Brexit.

President Tim Edwards thanked everybody and adjourned the meeting at 19h25.