May - June 2020

THE LEADING FLORICULTURAL JOURNAL IN THE REGION

FLORICULTURE

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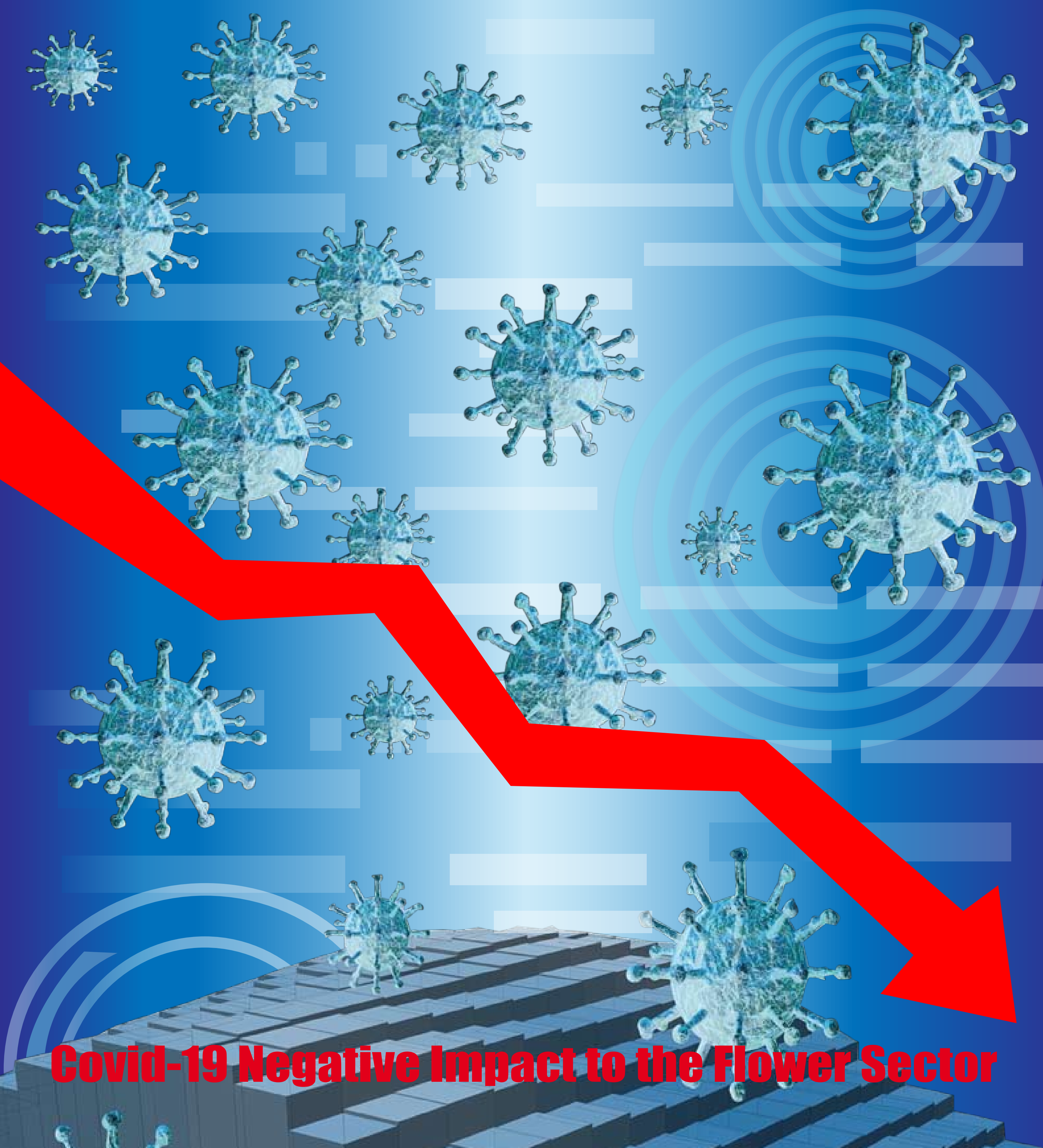

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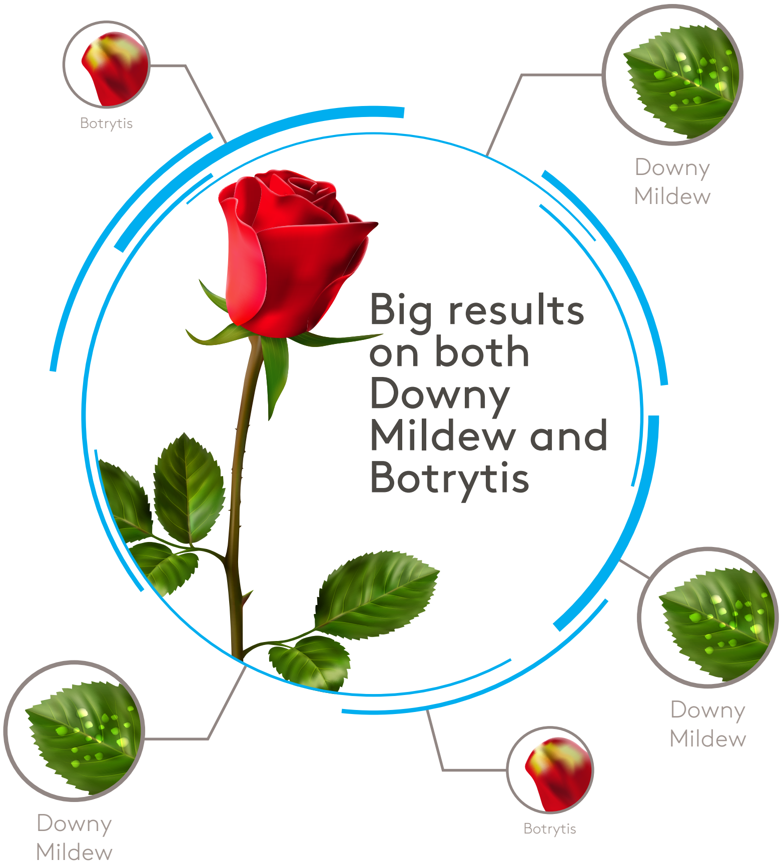

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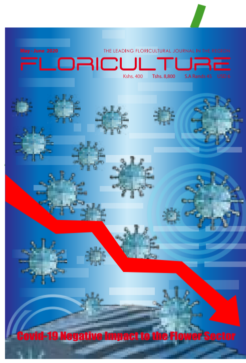

The Leading Floriculture Magazine

Contributions to Floriculture are welcome. Although every effort will be made to return manuscripts and photographs, these are submitted at owners' risk. Opinion expressed by contributors are not necessarily the views of Floriculture. Floriculture is published six times a year and circulated to personnel in the Horticulture Industry, foreign missions and Kenyan Embassies abroad, Flower Growers, Exporters and Consumers, extension officers in the Ministry of Agriculture and counties, research offices and suppliers of agricultural inputs in Kenya.

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Editorial

HR Officers can help restart the economy

The COVID-19 pandemic has altered all aspects of our lives from personal health, global economy, and the light speed arrival of the future of work into our daily lives now.

We've watched many industries lose as much as 90% revenue and working to find innovative ways to keep moving forward. In these innovations, collaboration and altruism are key ingredients for the "Next Normal" in business.

As the Flower sector enter its response to the pandemic, there is need for human resource managers to take the centre stage in guiding organizations through the pandemic by leading the people strategy and transitioning their organizations to full remote work and digitization in a matter of weeks. HR organizations are charged with taking care of employees' health and financial health of the organization.

In the transition to remote work, "bringing our whole selves to work" takes on a deeper and literal meaning. This includes babies, dogs and family members interwoven into our work lives. This blur of the personal and professional life reminded us that we are all connected. Sometimes being vulnerable and human, like having your toddler wander into your office during a Zoom call, allows others to exhale.

As this innovation evolves, HR and talent-centric organizations should come together in this trend of Collaboration & Altruism to help get people back to work in their organizations and beyond.

The world is about to face the biggest talent Rubik's Cube. Talent is in the marketplace, but how to find the right talent that moves an organization forward is the new challenge. It's never been more important to get people back to work, and not just to any job, but to a job they love.

Masila Kanyingi
Editor

FLORINEWS

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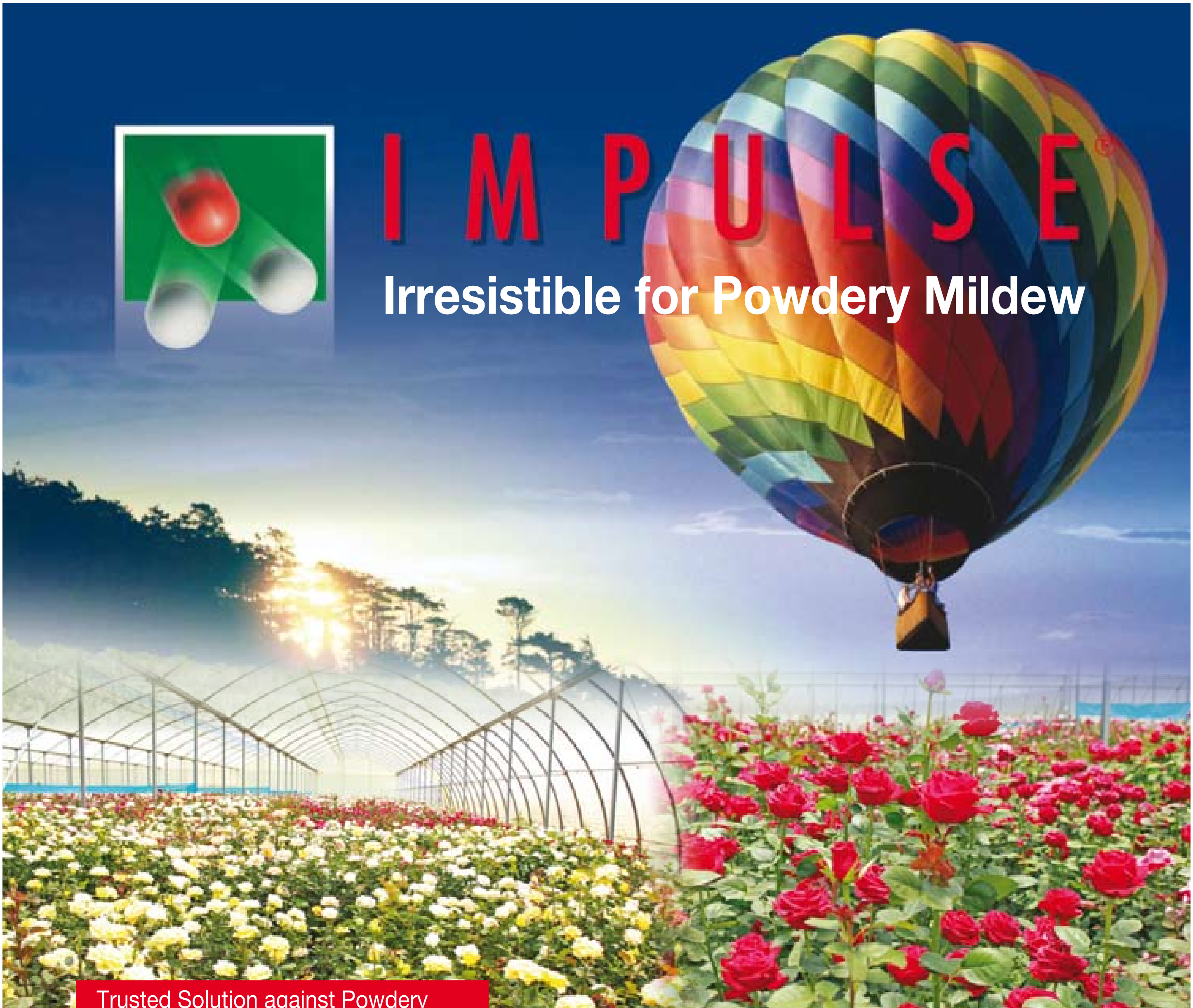

Trusted Solution against Powdery Mildew in Roses.
It's **Irresistible**

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- Ideal fungicide to alternate with Luna Tranquility and rotation with other molecules of different FRAC class to avoid and manage potential resistance risk

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SPIROX 500 EC: New launch from UPL Limited

Ornamental crop production is a specialized business centred on the beauty of flowers and attention to detail to deliver perfect results. UPL has reinforced its commitment to the global ornamentals business to support sustainable businesses through a close collaboration with ornamental growers. Increasingly, UPL limited has partnered with ornamentals growers in continually enriching their crop protection needs with integrated pest management compatible solutions to meet their customers' needs towards the leading certifications schemes.

The registration of SPIROX® 500 EC opens the door to a unique fungicide that will improve UPL Limited fungicide offer to ornamental growers in both Kenya and Ethiopia. SPIROX® 500 EC is a systemic foliar applied fungicide for the control of powdery mildew in Roses and rust in Carnations. The active ingredient of Spiroxamine, belongs to the chemical class –spiroketalamines. Due to its systemic properties, Spiroxamine provides protective as well as curative and eradicative activity. The active ingredient rapidly penetrates the plant tissue and has a good residual action.

MODE OF ACTION:

SPIROX® 500 EC is an Ergosterol biosynthesis inhibiting (non-DMI) fungicide. The active ingredient spiroxamine intervenes in the metabolism of the fungal pathogen.

Powerful chemistry against control powdery mildew!

SPIROX® 500 EC fungicide provides a more convenient option that combines highly effective protection with the capacity to deactivate existing flag shoot infections. Controlling powdery mildew is a numbers game. Using the right chemistry early in the season during rapid growth stages provides the best possible foundation for controlling powdery mildew and helping you produce your best.

The ideal choice

• Spirox is a powerful, systemic fungicide for the control of powdery mildew in Roses and rust in Carnations. Being mobile through the xylem,

• Spirox is ideally suited for use during the rapid growth phases of the crop.

• Spirox features a unique mode of action with no known cross-resistance with other chemistry groups.

• Spirox is highly effective when used early in the season, where it provides protective activity against new and flag shoot infections.

• Spirox rainfastness is within 1 hour and delivers control of powdery mildew and rust across a range of temperatures, making it a very flexible inclusion in your spray program.

• Spirox is safe to beneficial insects, when used as directed.

"UPL Limited is passionately committed to partnering with growers and industry partners to develop innovative solutions that result in more marketable produce. With SPIROX® 500 EC growers have an economical solution that will enhance quality and yield of ornamental plants for demanding markets" These were remarks made by Mr Innocent, Commercial Manager for Kenya at UPL Limited during an interview with this magazine. He further added that SPIROX® 500 EC is highly compatible with biological controls and has a proven high efficacy against Powdery Mildew control.

Disease resistance management strategy: Tank mixing or alternating with fungicides having a different mode of action, such as triazoles (DMI fungicides), strobilurins, etc, may delay the development of resistance. Block of two (2) sprays with SPIROX® 500 EC followed by a spray with fungicide of a different mode of action and/or chemical family is most preferable.

More advanced chemistry achieves better early control using fewer sprays

Working smarter: The highly systemic, rapidly penetrating nature of SPIROX® 500 EC provides a range of benefits to the proactive flower manager:

• THE UNIQUE CHOICE: Spirox is the only Group 5 (E) product registered for use against powdery mildew in Roses. Rotating chemistry early will give you maximum flexibility at the critical flowering stage. Powdery Mildew fungicides should always be used preventatively, before an infection is visible.

• GET IN CONTROL: Early season control is crucial to an effective powdery mildew program, this provides the best possible start to the powdery mildew program.

• STAY IN CONTROL: Keeping disease levels down early allows for a more flexible, leaner and targeted approach later in the season.

• FLEXIBLE APPLICATION: Spirox is highly compatible with many other products used during the early season growth stages.

• FLEXIBLE IN YOUR CLIMATE: Working within the vine to protect against powdery mildew, the benefits of Spirox will not be washed away during the next shower. Spirox is rainfast within one hour, and provides control of powdery mildew across a range of temperatures.

• CONFIDENCE IN THE TECHNOLOGY: Thirty percent of the active ingredient is taken up into the vine within 10 minutes, with the remainder of the active ingredient being almost completely taken up within 3 hours.

• REDUCED SPRAYS: The recommended spray interval for Spirox is 14–21 days, potentially reducing the requirement for sprays of older, surface active products.

• RESISTANCE MANAGEMENT: Do not use Spirox (Group 5 fungicide) more than three times in one season, and not for more than two consecutive applications.

In a discussion with Mr Michael Gathage, a Production Manager at Oserian Development company limited. He added that newer chemistries give growers an advantage in terms of rotation and resistance management. "The market is ready for Spirox. It seems there is a renewed focus by UPL limited to fill in the gap we currently have for Powdery Mildew. Newer and innovative solutions will definitely help us have better Powdery Mildew control and a good resistance management programs. Additionally, the crop safety aspect of SPIROX® 500 EC makes it a valuable tool to guarantee high quality roses", he said.

SPIROX® 500 EC

FUNGICIDE

Spiroxamine 500g/L

A SYSTEMIC FOLIAR APPLIED FUNGICIDE FOR THE CONTROL OF POWDERY MILDEW ON ROSES AND RUST ON CARNATIONS.

The ideal choice against Powdery Mildew and Rust!

- **THE UNIQUE CHOICE** : Spirox is a reliable tool against powdery mildew.
- **GET IN CONTROL**: Spirox early season application is crucial to an effective powdery mildew management, this provides the best possible start to the powdery mildew program.
- **STAY IN CONTROL**: Spirox Keeps the disease levels down early allowing for a more flexible, leaner and targeted approach later in the season.
- **CONFIDENCE IN THE TECHNOLOGY**: Thirty percent of the active ingredient is taken up into the plant within 10 minutes, with the remainder of the active ingredient being almost completely taken up within 3 hours.

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It will take 4 to 5 years before the industry is back at the 2019-level

The floriculture is hit hard by the COVID-19 crisis, but when looking at the past, present and future, how is the industry expected to develop and recover? Rabobank tried to predict the global economic impacts and the effects on the floriculture industry. Lambert van Horen, Analyst - Fresh Produce at Rabobank, a Dutch bank with clients all over the world, was present at the PMA Virtual Town Hall*, to give an insight in the scenario they outlined.

Western world hit hard

When looking at the macro-economic baseline scenario, it is expected that a lockdown in a country takes about 3 months, that countries will reopen gradually - for many this will start in May -, and that it will take about 3 quarters to get back to the 'normal', without restrictions, van Horen explains.

When looking at the global GDP, the impact for 2020 is expected to be -2.6%, with The Western world being hit hard. "China and Asia (excl. China) are the only ones expected to have a (small) positive economic growth in 2020. Fortunately, for 2021, Rabobank expects the global GDP to grow with +5.3%."

Four stages to recovery

At Rabobank, effects during the recovery are divided in 4 stages. Each stage has an effect on the floriculture industry, which van Horen describes below.

Stage 1. Strict lockdown and border control: *(currently in significant number of countries e.g. India, Japan).*
"As we experienced the last four months, floriculture is not considered as a "vital" sector in any of these countries that are in a strict lockdown. Florist shops, garden centers, and street markets are mostly closed during this stage and supermarkets give priority to the supply of fruit & vegetables in their disrupted logistics. On top of that, there is significant reduced demand from public and private events (weddings, funerals, parties) and (food) services such as restaurants, hotels, and offices. As a result, there are immediate huge price falls and recovery is slow. In order to reduce cost of operation, companies have to rebase their operation level where possible to slow down production. Just after a short time there are some positive "cocooning" (staying inside one's home) effects on retail flower sales, lots of marketing/goodwill actions are being set up, and the internet sales increase enormously."

Stage 2. Semi lockdown, easing of restrictions: *(currently in some South-East Asian countries, starting in Europe, starting in the USA).*
"First of all, supermarket sales are

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Lambert van Horen shares Rabobank's predictions and the effects on the floriculture industry

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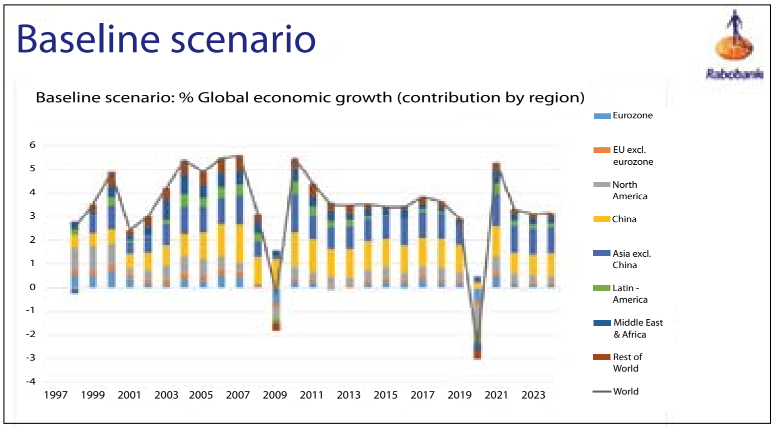
going back to normal in this stage and florist shops and garden centers are reopening. However, it is expected that some growers and florists will stop their business, especially smaller businesses and/or specialty growers, with the crisis possibly leading to a smaller flower assortment.
In this second stage, people are learning to deal with the new 6-feet economy and the supply chain is learning to deal with new logistics rules. However, airfreight restrictions and costs have a large impact on African and South American production and trade. As a result, some disruptions are expected to arise in breeding and propagation as lots of cuttings or in-vitro plants are produced in countries like India (in-vitro), Costa Rica, Guatemala, and Tanzania. Due to the re-opening there will be some price-recovery and improved demand. Also in this stage, “cocooning, especially regarding nursing home et cetera continues at a high level and government support programmes are set up for specific segments or companies. ”

Stage 3. Lifting of lockdown and restrictions*(social distancing-China)*.
“In this third phase all food services and retail outlets are open again.



But flowers are not top of mind for customers like hotels, and catering companies. The current situation in China (e.g. Kunming) is an example for this stage. The cocooning effect will be disappearing, but on the other hand there is some recovery in event demand. The international travel slowly starts, therefore supporting recovery in African and South American floristry, albeit still at depressed levels from pre-lockdown.”

Stage 4. Recession
“As stated earlier, Rabobank expects a global decline in economic growth for 2020. This will lead to a shake out in the market with continued closure of some businesses (growers, traders, logistics, florist shops) and consolidation. The higher unemployment levels will depress the demand for cut flowers and indoor potted plants - these purchases usually have a high correlation with economic development. The higher international air transport costs and lower capacity will cause some problems for African and South American supply. To our opinion it will take 4 to 5 years before the industry is back at the 2019-level. In addition to this, sustainability goals (like the Paris climate agreement) in (covered) horticulture might be more difficult to reach because of the lack of finance (e.g. for geothermal

Economic impact of Covid-19 on local flower industry massive

Parties, functions and weddings have been called off and event planners pulled the plug en masse, cancelling all orders of flowers.

Flower farmer are staring at disaster if disruptions caused by the coronavirus pandemic continue to august. The pandemic has hit supply chains including major retailers and the event industry.

Local flower farmers discussed with the *Floriculture Magazine* the devastation the flower farming industry is experiencing due to lack of demand from consumers, cancelled orders from industry outlets and transportation line shutdowns.

"Almost the entire market has collapsed. Technically, our industry has been on lockdown for a while," said a flower grower, whose business over the last one month has just disappeared.

Since the government declared the pandemic a national disaster and limited public gatherings to 15 people, flower producers ceased almost all of their operations.

Parties, functions and weddings have been called off and event planners pulled the plug en masse, cancelling all orders of flowers.

"Our industry shut down overnight after the government banned social gatherings," said a grower, who has been farming for almost 20 years and employs 203 full-time workers.

" I think its fair to say that all farmers are very nervous right now about where all markets are heading," he added.

The coronavirus outbreak has consumers focused on buying necessities like toilet paper, hand soap and food. What their wallets do not stretch to are flowers on their way to the checkouts, and that's a problem. He said the coronavirus has been a disaster for his business.

"We supply supermarkets, wholesalers and have a national contract with major retailers, but the orders have stopped dead."

There is no rebound for the farmers – they will have to dump most of their harvests, losing

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millions of dollars. The coronavirus will impact the entire industry, how much? "I think it's still up in the air right now," he said. The farmers said if sales do not recover after the 30-day shutdown they will be forced to close their business and layoff staff.

Industry Statement

About a million people who directly or indirectly depend on the country's flower industry are facing an uncertain future in the wake of the coronavirus pandemic. With over 30,000 temporary workers already sent home and 40,000 permanent staff on annual leave, the Kenya Flower Council fears that should the pandemic not be contained, the industry would collapse. "We have been losing Sh20 million per day due to the coronavirus outbreak. This is a very huge amount, which makes it very difficult for us to operate," Clement Tulezi, the Kenya Flower Council CEO, said.

The industry, whose value stood at Sh120 billion in 2019, may shrink to half its value at the close of 2020 should the current situation take five-to-six weeks, according to Mr Tulezi. He added that the likelihood of wage cuts and the laying off of a huge portion of the permanent workers is high.

Valentines' Day

Poor sales during Valentine's Day, where only half of the targeted sales were made, and the expected low demand on Mothers' Day in May owing to the coronavirus lockdown effected in numerous countries, have already posed a big challenge to the industry.

The farms are now spraying fertilisers and irrigating farms while cutting the flowers to sustain them which is costly. The farms are harvesting flowers and are shredding them.

Total Lockdown

Europe's total lockdown has exacerbated the situation due to the fact that most of the flower output from Kenya is exported to the continent. "Almost the entire market has collapsed. Currently, there is no demand for flowers in Europe. And 70-75 per cent of our exports go to Europe and this has greatly disrupted the supply chain," said Mr Tulezi.

A majority of the remaining 30 per cent of the market is catered for by the US and Asian economies such as China, United Arab Emirates and Japan.

The total lockdown announced by the US has increased pressure on the flower industry. Stakeholders are now worried over the numerous embargoes set by client states. Cases have been reported of flower exports being shipped and destroyed as was the case in The Netherlands.

September last year saw the council initiate plans to increase exports to Russia and hopes were high that this would be accomplished this year. However, this projection has so far been curtailed.

Mr Tulezi called on the government to step in and salvage the situation before things get worse.

Responsible

"It is time for the government to prove how responsible it is and that it cares for the businesspeople and show that it appreciates their role to the nation. It should honour the tax refunds, close to Sh9 billion that it owes us. The government should expedite the release of this money to the industry," the chief executive said.

The training levy amounts to billions of shillings that is being withheld by the National Industrial Training Authority (NITA) should also be released without further delay to our members. If the worst come to the worst, and workers are declared redundant, the government should waive tax on their terminal benefits. The government must keep in touch with the stakeholders.

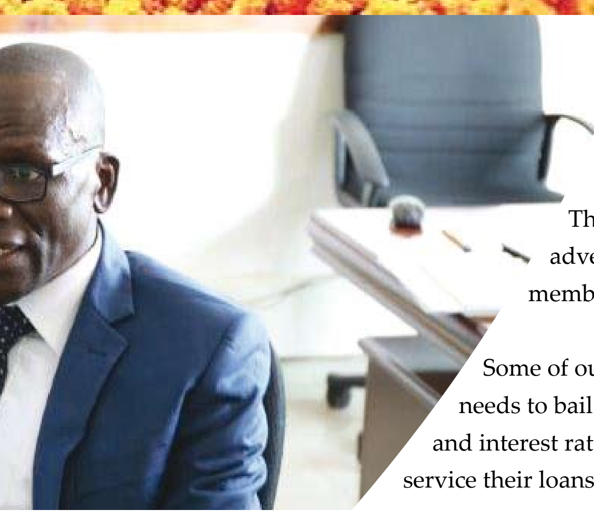
He added that the money would go a long way in stabilising the industry for a couple of weeks.

The Flower Council also called on the government to consider income tax relief for the workers in the industry, corporate tax, the tax charged on input and machinery as well as other levies. They also want the government to allow freight handlers to continue operations unhindered.

"The supply chain is complex. For us to inspire confidence in the market, we have to send positive messages. Though we are going through a difficult time, there is hope," Mr Tulezi said.

Lessons learned

There is need to diversify our market and stop relying on European markets alone. In addition, we barely sell one per cent to our local market in Africa, where a flower is more of a luxury. However, from the coronavirus scare, we need to diversify and create more awareness to our local market in the continent. Markets in Asia, South Africa and Egypt are still unexploited.



There is also a need to prepare for the pending global recession that would adversely affect our customers in Europe, the next challenge and might force our members to cut down production.

Some of our members have bank loans. The government, now more than ever before, needs to bail out these companies by talking to banks to adjust their loan repayments and interest rates. Most of the farms will soon close their operations and will not be able to service their loans. These loans should be suspended until the situation gets back to normal.

IFTEX and Other Events postponed

As governments around the world were shutting down public places such as schools, cafes and restaurants, measures were also being taken to limit the amount of people getting together by banning larger gatherings of people. As a result, several trade shows in the horticulture industry have already been cancelled.

IFTEX in Nairobi, Kenya

It was decided that the International Flower Expo IFTEX 2020 will be rescheduled to later this year. The original dates of June 3rd to June 5th were moved to October 12th to October 14th, 2020. Due to the current Coronavirus situation, it became inevitable to reschedule this year's exhibition dates."

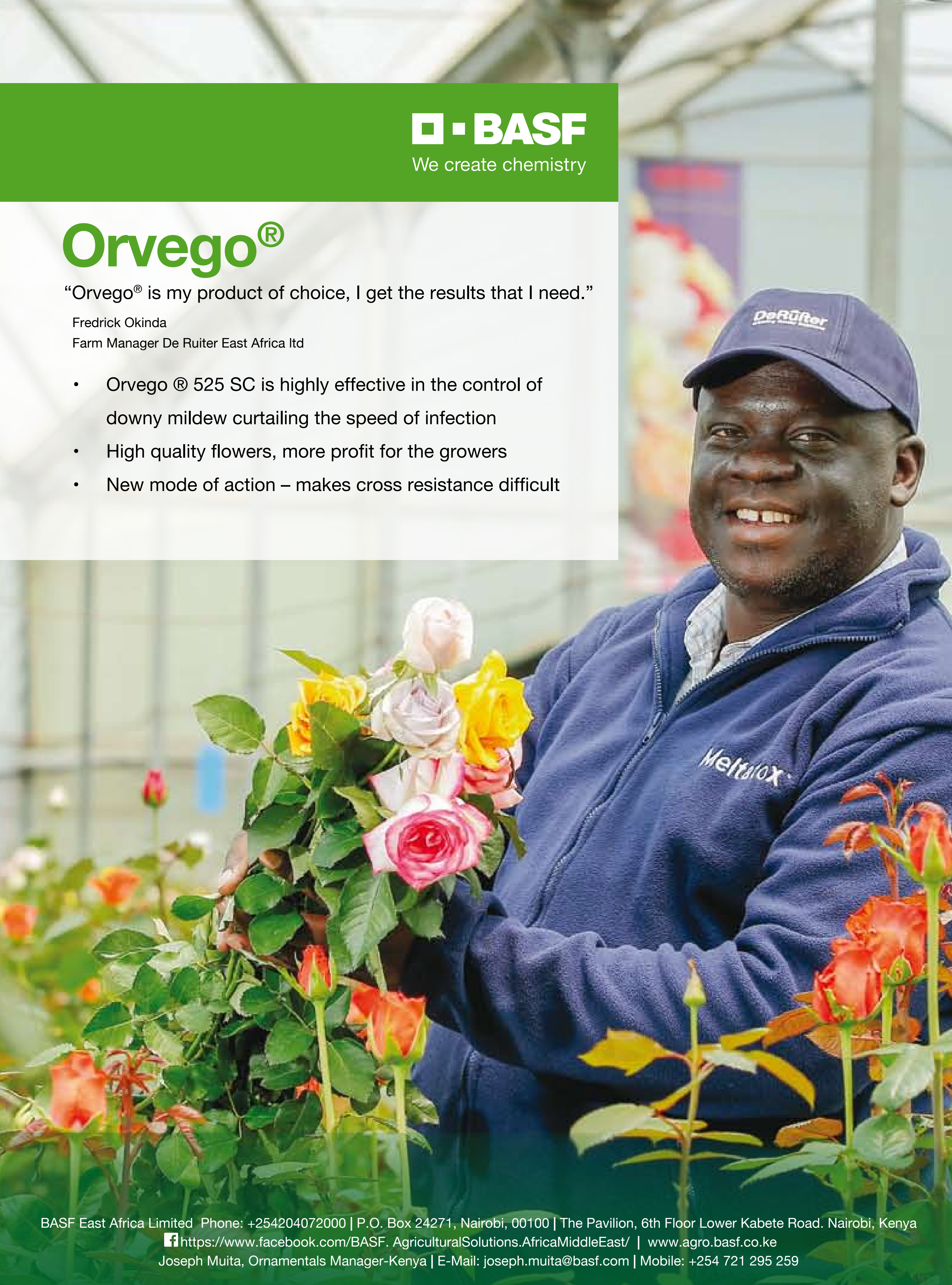
CIOPORA cancels AGM in Marrakesh

CIOPORA announced the cancellation of its Annual General Meeting in Marrakesh, Morocco. Addressing CIOPORA members and guests in an official statement released on March 12, CIOPORA President Steven Hutton wrote: "Although we are announcing the cancellation with great disappointment, we strongly believe that it is the only reasonable decision in the present situation. Above all, your safety and health are CIOPORA's main priorities." Because the epidemiological situation is changing swiftly, CIOPORA did not reschedule the events. Registered participants were asked to cancel their travel arrangements and will receive refund for the purchased AGM tickets.

While the AGM 2020 has been put on ice, the association is committed to delivering its education services despite the cancellations. With the Marrakesh Workshop on IP for plants and the CIOPORA Breeding Academy cancelled, the CIOPORA team started working on a series of webinars on the previously announced Workshop topics.

Australian events cancelled

Due to recent guidance from the Australian Health Protection Principal Committee (AHPPC) in light of the evolving COVID-19 (coronavirus) situation which advises against non-essential, organised public gatherings of more than 500 people, the 2020 Melbourne International Flower & Garden Show presented by Lawn Solutions Australia was cancelled.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Challenges Facing Kenya's Duty Free Access to the UK Market?

With nearly 40% of Kenya's direct exports to the UK currently benefitting from significant margins of tariff preferences, concerns have arisen around the UK's current MFN tariff review and the future basis for Kenya's continued duty-free access to the UK market after 1st January 2021. In addition, there are growing concerns about the future commercial viability of the use of triangular supply chains for the delivery of Kenyan short shelf life products to the UK market if no comprehensive EU/UK trade agreement is in place by 1st January 2021. Any future EU/UK trade agreement would need, as far as possible, to replicate the current frictionless trade, on which the operation of these triangular supply chains depends. This is looking increasingly unlikely. The Government of Kenya thus faces a triple challenge in ensuring a continuation of current patterns of exports to the UK market into 2021.

The MFN Tariff Issue

Kenyan exporters, through FPEAK, have sought to engage with the UK on-line MFN review consultation process, with the aim of making known Kenyan concerns. The Kenyan government is also understood to have made direct representations to the UK government in regard to their concerns around the MFN tariff review. Until the UK governments' future MFN tariff schedule is announced, the Government of Kenya, in cooperation with other concerned ACP exporters, will need to continuously reiterate their concerns over the UK's future MFN tariff policy.

Given the level of concerns expressed to date, less dramatic changes to UK MFN tariffs than proposed in October 2019 would appear likely. This should bring some relief to those officials in the UK government tasked with negotiating new 'UK-only' trade agreements, since in the highly protected agri-food product sector the UK will have held on to a range of important bargaining chips (high MFN tariffs) for use in bilateral trade negotiations with countries such as India.

However, the situation remains uncertain and hence individual Kenya exporters will need to review their vulnerability to the increased competition which could arise from the removal of current UK MFN tariffs. This may require market repositioning strategies on the UK market or export diversification strategies to focus more on EU27 markets, where high margins of tariff preference over MFN suppliers will continue to be enjoyed.

Kenya's Future Duty-Frees Access to the UK Market

In regard to the future basis for Kenya's continued duty free-quota free access to the UK market, it should be noted Kenya is the only East African Customs Union member vulnerable to loss of such preferential access. All other EAC members are classified as least developed countries, and hence have no need of a Continuity Agreement with the UK (or EPA with the EU) to ensure continued duty-free access to the UK market. In the case of the UK market this continued duty free will be assured through the UK's parallel scheme in favour of LDCs which was announced as early as June 2017 It is thus only Kenya which would have its trade affected by the absence of

Mr Hosea Machuki, FPEAK CEO

Continuity Agreement with the UK.

However, concluding a Continuity Agreement with the UK (as with the EU EPA) would drag the least developed country members of the EAC into reciprocal preferential trade arrangements, despite the recognised right of LDCs enshrined in the WTO, to non-reciprocal preferences. This needs to be seen in a context where Kenya accounts for less than 30% of the total population of the East African Customs Union.

Given the existence of the East African Customs Union, the integrity of which would be fundamentally undermined by Kenya bilaterally signing and applying a reciprocal preferential trade agreement with the UK (or EU), in terms of access to the UK market a case can be made for the UK finding a mechanism to treat the EAC as whole as a least developed region. If this should not prove to be possible, a mechanism should be sought which preserves Kenya's duty-free access the UK market, without compromising the right of LDC EAC members to non-reciprocal trade preferences.

One option in this regard would be the adoption of an extended interpretation of the coverage of EBA style preferential arrangements along the lines of an earlier 'Norway-style EBA+' arrangement. This added countries to the EBA beneficiary list on the basis that they were lower middle-income countries (LMICs) and had populations under 75 million.

What is clear is that if the rights of EAC LDCs are not to be compromised, then the UK government should not push Kenya into concluding bilaterally a reciprocal preferential trade agreement which would automatically (and without their sovereign consent) bring EAC LDC governments into a reciprocal trading arrangement with the UK. A solution needs to be found which does not force the Government of Kenya into choosing between continued regional market integration in East Africa and its existing trade relationship with the UK.

In this context the UK's withdrawal of its Transitional Protection Measure proposal simply complicates matters. It serves to intensifying pressure to negotiate a UK only trade arrangement in a context where the UK itself is poorly placed to devote the necessary attention to an issue which could carry profound socio-economic consequences for those individuals and communities in Kenya whose livelihoods are dependent on UK export markets.

In this context reinstating and extending the Transitional Protection Measure tabled in October 2019 would give priority to ensuring additional time is made available to find appropriate solutions to the dilemma faced in East Africa, rather than simple 'box ticking' in a context where UK government trade officials are increasingly under pressure to take short cuts in dealing with complex trade policy issues.

In this context it should be noted that to date the Government of Kenya has not begun any tariff phase downs on imports from EU27 member states, with the EU continuing to de facto extend non-reciprocal duty free-quota free access to imports from Kenya. For as long as the Kenyan government continues not to apply agreed tariff reductions no discrimination against UK exports relative to EU27 exporters can emerge.

In this context the UK would do well to mirror the EU's approach, since no UK interests in trade with Kenya would be affected by the adoption of such an approach. Politically, it would appear important to find a solution to the dilemma faced in East Africa before the Commonwealth Heads of Government Meeting (CHOGM) in Kigali at which trade will be one of the five themes under discussion.

Such an early announcement can be seen as essential to averting any disruption of Kenya-UK commercial relations in those products where current tariff preferences are most significant. The hard reality is that uncertainty over the future of Kenya's duty-free access to the UK market from 1st January 2021 could begin to have real commercial consequences from as early as the second half of 2020, as negotiations get underway for the supply of horticulture and floriculture products to the UK market for 2021. This could generate a downward

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pressure on prices offered for Kenyan products as UK importers seek to hedge against a possible loss of duty-free access to the UK market.

Triangular Supply Chain Issues

In terms of triangular supply chains, individual Kenyan exporters will need to review their exposure to disruptions along such trade routes to the UK market. Where a high degree of exposure is determined to exist, it may be necessary for Kenyan exporters to explore new direct routes to serving UK markets. Initiatives have already been taken in this regard, with the initiation of direct cargo flights from Nairobi to Doncaster/Sheffield airport in the north of England, as early as June 2017

However, the last recorded flight along this route (which at its peak handled 11 flights per month), was in on the 6th August 2019, suggesting there are some operational problems faced in re-directing cargoes directly to the UK, while existing routes via ports of landing in EU27 member states continue to operate without interruption. Nevertheless, this illustrates the potential for the development of new direct routes to the UK in the event of disruptions of triangular supply chains, provided of course other key services can be assured (e.g. SPS clearance on landing).

At the policy level the Government of Kenya could potentially play a leading role in initiating a political dialogue with the UK and EU authorities on the need for a clear political commitment to taking all necessary measures to ensure the continued smooth functioning of triangular supply chains serving the UK market via initial ports of landing in EU27 member states. Such a Kenyan government led initiative would be likely to garner support from a wide cross section of ACP countries, whose exporters would be similarly adversely affected by any disruption of current triangular shipment routes.

However, in addition to this political dialogue there will need to be a parallel dialogue on the practical logistical and border clearance measures which will need to be put in place to facilitate the continued smooth flow of goods along these triangular supply chains. For short shelf life fruit, vegetable and cut flowers, COLEACP could potentially play a role in coordinating such a technical dialogue process (if the resources are made available). However other bodies will also need to get involved given the specific complications which will arise along other triangular supply chains (e.g. for Caribbean rum exports, where bulk rum is exported to EU27 countries before bottling and re-export to the UK).

What is clear is that such initiatives are needed if the existing ACP trade to the UK along triangular supply chains is not to be seriously undermined.

Value of Kenyan Duty Free-Quota Free Access for Cut Flowers and other Fruit and Vegetable Exports to the UK Market – 2018 (€ millions)

Tariff Code	Product Description	Current MFN Tariffs Applied by the UK	Exports to UK 3018
060311	Roses	8.5%	€53.8 million
070820	Beans	10.4% min €1,600/100 kg +€178.68 UP /100 kg	€51.5 million
07041000	Broccoli	9.6% + €1010/100kg	€20.5 million
070810	Peas	8%	€7.2 million
060312	Carnations	8.5%	€4.7 million
070930	Eggplants	12.8%	€3.7 million
070960	Peppers/Pimento	6.4% to 7.2% + €91.11 UP / 100 kg	€2.1 million
060319	Other cut flowers	8.5%	€1.8 million
080440	Avocados	4.0% + €329.51 UP / 100 kg	€1.8 million
081020	Raspberries	8.8% + €698.39 UP / 100 kg to 9.6%	€1.2 million
060315	Lilies	8.5%	€0.9 million
060314	Chrysanthemums	8.5%	€0.4 million
070310	Onions/shallots	9.6% to 9.6% + €224.11 UP / 100 kg	€0.3 million
070390	Leek & Other alliaceous vegetables	10.4%	€0.19 million
071390	Other legumes (dried)	3.2%	€0.13million
070610	Carrots/turnips	13.6% (7% TRQ)	€0.03 million
080290	Other nuts	2%	€0.002 million
Sub-Total			**€150.252 million**
% Total			38.9%
Total	**All Products**		**€386.5 million**
	Other products	**Zero MFN Tariffs**	
090240	Black Tea	0%	€148.0 million

Flower growers Show Compassion to the sick in Kenya and UK

The first bouquets were distributed at Kenyatta National Hospital and Mbagathi Hospital in Nairobi. Some 1,000 bunches of flowers were taken to Mama Lucy Hospital, Pumwani Maternity and the National Spinal Injury Hospital. The flowers are donated by flower farms under the Kenya Flower Council and distributed by the alliance together with Elgon Kenya and the Rotary International.

After a successful distribution in Kenya's main hospitals in Nairobi and the counties, UK distribution is the first international distribution, an important symbol as London is Kenya's traditional market for flowers.

Kenya Airways carried the 300 bouquets of flowers to London, United Kingdom to show empathy amid the coronavirus pandemic that has left more than 20,000 dead in the European country.

It is part of a campaign dubbed 'Flowers of Hope'

Uhuru, Kepsa defend 'Flowers of Hope' initiati

Kenya Private Sector Alliance (Kepsa) has dismissed claims that the government bought and sent flowers to health workers battling Covid-19 in the United Kingdom.

Kepsa chief executive Carole Karuga said the flowers were donated by growers, who have to cut and maintain their crops during the pandemic.

In the campaign 'Flowers of Hope', an initiative of Kepsa alongside the Kenya Flower Council and Elgon Kenya, growers started by taking bouquets of flowers to Kenyatta National, Mbagathi, Pumwani and Mama Lucy and National Spinal Injury hospitals.

"The international floriculture industry is a complex and highly integrated supply chain and when the pandemic chocked international markets particularly in Europe, flower shops closed, and restrictions were imposed resulting in dramatic fall in the demand for flowers," said Karuga, noting the crops must be maintained despite the situation.

The flower donations were endorsed by President Uhuru Kenyatta, who added a message of goodwill on every bouquet offered.

President Kenyatta defended the initiative, faulting Kenyans on social media who have criticised the government for the donation.

The President noted the country must look ahead of the coronavirus pandemic.

"The coronavirus pandemic will end. The flower sector employs thousands and thousands of Kenyans. And they say people are remembered during challenging times. When the export flower markets will finally open, these recipients will remember the

informed by the realities brought forth by how the Covid-19 pandemic is impacting world economies.

President Uhuru Kenyatta had signed the message of hope on the sleeves accompanying the flowers, further giving recipients hope that the Kenyan

ve

individuals who stood with them during those challenging times and reciprocate by buying their flowers," he aid.

The flowers sent to the UK seek to bring joy and show solidarity with front-line health workers fighting the pandemic, a move that could in turn boost the sector's prospects when markets reopen.

The flowers were delivered to six hospitals in the UK dealing with the coronavirus pandemic, including the Great Ormond Street Hospital

government cares.

The campaign kicked off as an initiative by Kenya Private Sector Alliance (KEPSA) members, Kenya Flower Council (KFC), Kenya Association of Manufacturers (KAM), Elgon Kenya, Kenya Airways and Jambo Jet and partners of KEPSA as a uniting symbol to show solidarity and compassion emerging in Kenya and indeed the world as a response to the Covid-19. The bouquets were distributed to doctors and nurses on the frontline of combating Covid-19, recovering patients, and care homes.

KEPSA's CEO Carol Karuga said, "Our member, the Kenya Flower Council, has done this to show empathy and this sends a strong message of partnership at a time when many countries are facing difficulty. It is part of our campaign dubbed 'Flowers of Hope' informed by the realities brought forth by how the Covid-19 pandemic is impacting world economies."

"The campaign is a show of gratitude and

in London, Salford Royal Hospital, Northern Care Alliance and the Manchester University NHS Foundation Trust.

support to the people at the frontline of or suffering from the pandemic, which will also help in saving thousands of farm jobs in Kenya's flower farms," added Karuga.

The Kenya Private Sector Aliance-led initiative "Flowers of Hope" will continue to deliver bouquets at hospitals, bringing hope to caregivers and patients.

The flower donations are among other initiatives being carried out by the participating organisations to mitigate the effects of the coronavirus pandemic. The others are food distribution and mounting of handwashing stations at various places.

Just like flower blossoms, the underlying message of the 'Flowers of Hope' initiative is "we shall overcome Covid-19".

Mr. Bimal Kantaria, MD Elgon Kenya

Covid-19 Related Cancellation of Commercial Flights

The current Covid-19 disruptions of Kenyan exports to Europe, particularly along triangular supply chains to the UK, highlights the importance of shortening supply chains by wherever possible, contracting with the final retailer and shipping products directly. For exporters who can get to grip with current logistical challenges, rising EU demand for fruit and vegetables and rising prices could yield commercial benefits to counter-balance some of the Covid-19 disruptions. This is particularly the case since labour shortages in the fruit and vegetable sectors as a result of disruptions to labour flows could depress fruit and vegetable production throughout 2020.

While in the two weeks to 20th March 'Kenya's fresh produce exports to the European Union… dropped 46%', this was largely a result of the collapse of cut flower sales in Europe, with fresh fruit and vegetable exports holding up reasonably well. According to the CEO of the Agricultural Employers

Association (AEA), Wesley Siele, 'the fresh produce sector was stable', since 'supermarkets mainly in the UK, Sweden, and Russia were still ordering fresh produce from the country'. The largest market effects were in the out-of-house dining market component, which saw the rapid cancellation of fresh produce orders. However, according to the EU Agriculture Commissioner Janusz Wojciechowski, 'the consumption of fresh fruit and vegetables in the EU has been booming in recent weeks. Spain, Italy and the Netherlands report 40% increases, and Germany up to 100%', with demand 'expected to stay strong during the containment period.

CEO Siele took the view demand for fresh produce like vegetables and fruits would 'stabilise in the coming days as the affected countries contain the pandemic'. However, this appears to be an over-optimistic view given the extension of social distancing and lock down measures. In addition, the closure of the EU's external borders to non-EU nationals for 30 days, alongside similar global movement restrictions, has seen the widespread cancellation of scheduled passenger services, which carry fully 80% of fruit and vegetable sector air freight.

With most of these flights having been grounded, it is reportedly 'very difficult to find suitable flights' to the Netherlands, which handles fully 30% of the EU's extraterritorial imports of fruit and vegetable products. The authorities at Schiphol airport have however moved to reallocate freed up passenger flight slots to cargo flights, although it will take time for new landing rights to be taken up.

Okisegere Ojepat Chief Executive of the Fresh Produce Consortium of Kenya has highlighted how this is having a very real impact on air freight rates, which tripled in the two weeks to 27th March. As logistical difficulties mount in Kenya and the Covid-19 pandemic begins to spread in Kenya itself, farm workers are being 'sent home on mandatory leave because orders cannot be shipped'. This is seen as most acute in the green beans and peas sector where Kenya is a major supplier to the EU market.

Kenya is not the only country affected, with exporters from Ethiopia, Ghana and Madagascar reporting many export markets around the world closing, with only a few niche markets remaining open. There are also reports that 'cargo flights from Suriname and the Dominican Republic have now been cancelled', making it increasingly difficult to get air freighted fruit and vegetable exports to markets in the EU. In the case of Surinam, the only cargo space available was on special repatriation flights organized for Dutch citizens wishing to return to the Netherlands.

For Kenya getting goods to Europe is just one dimension of the logistical challenge now being faced. For triangular supply chains, which use distribution hubs in a single EU member states to serve multiple EU markets, logistical challenges are increasingly faced in regard to the onward movement of cargoes, as the free movement of goods across internal EU borders face delays as Covid-19 related movement restrictions and public health requirements are introduced.

These problems of on-ward trade are being compounded by a shortage of drivers, personnel shortages at border posts as staff fall ill or show symptoms of Covid-19, as well as the rising cost of refrigerated containers. Addressing these problems is likely to prove politically complicated given the different response times of EU member states in moving to 'lock downs' aimed at containing the pandemic and the different approaches taken to testing.

While efforts are underway to ensure a coordinated approach to facilitating the cross-border movement of essential goods, so far EC efforts to establish 'green lanes' to fast track cross border freight movements have only been taken up by 3 EU member states. Against this background these problems of cross border cargo movements are only likely to intensify.

It is against this background that fruit and vegetable exporters in Latin American countries are exploring the scope for organizing air charters to deliver cargoes more directly to target markets. This is seen as particularly important given the rising prices of fresh fruit and vegetables which is underway as demand surges. Current price rises could continue, given the disruption to migrant labour supplies to the agricultural sector which the Covid-19 pandemic has given rise to.

However, these price increases will not be universal. The recessionary effects of the containment measures introduced in response to the Covid-19 pandemic, are likely to see demand fall for certain products where ACP countries have a growing export interest, such as mangoes and avocadoes. These broader economic effects of the Covid-19 pandemic will need to be considered, as ACP fruit and vegetable exporters seek to adjust to the current Covid-19 market disruptions and post Covid-19 trade and market developments.

There can be little doubt there are turbulent times ahead for ACP fruit and vegetable exporters, with ACP exporters needing to be nimble in responding to the challenges faced.

Waitrose support Seven Flower Farms.

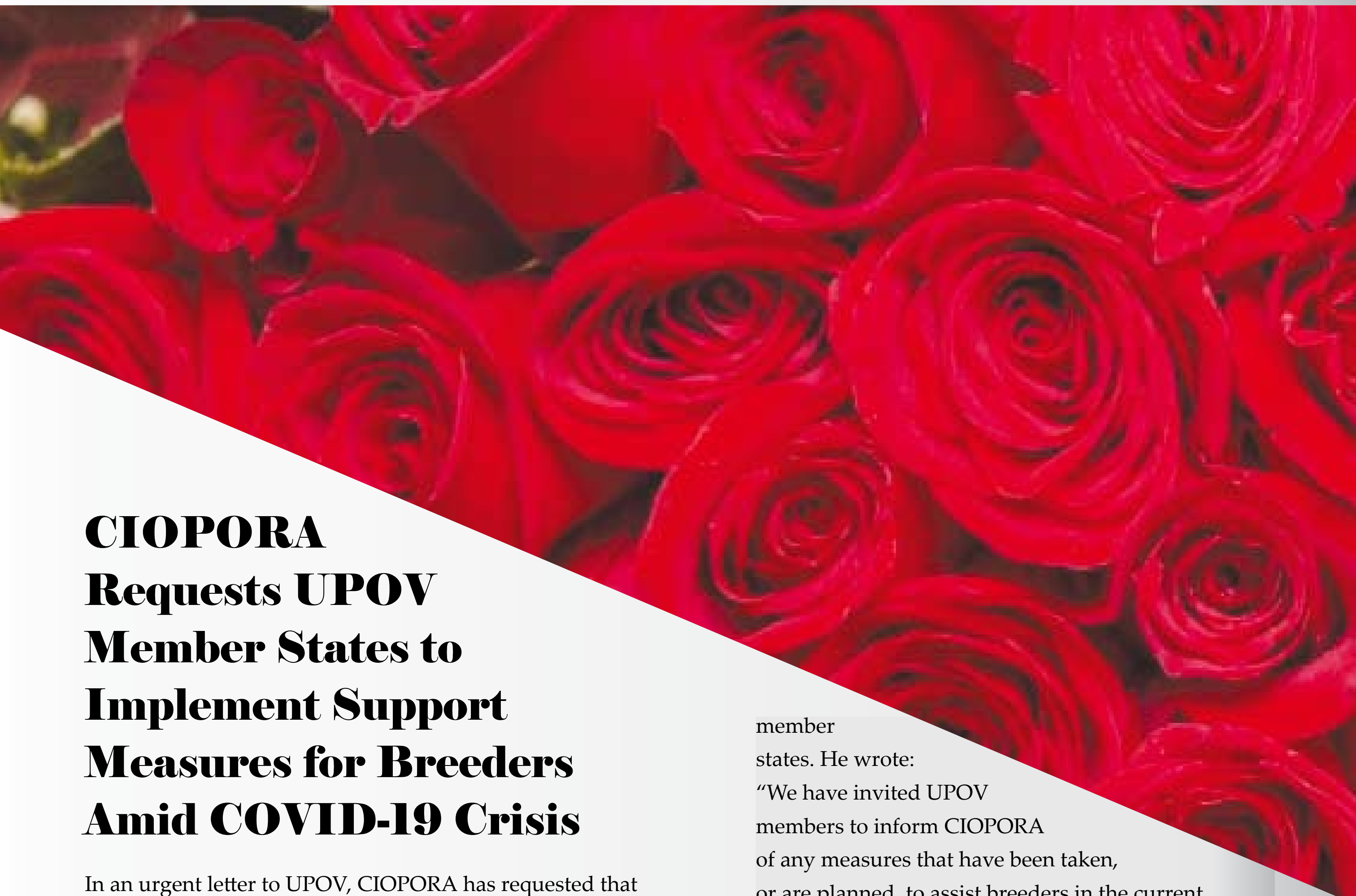
Seven Kenyan horticulture farms benefited from a Sh11 million emergency fund provided by Waitrose, a UK-based store in partnership with Farm Africa Kenya, meant to cushion them against the effects of the Coronavirus pandemic. The beneficiaries are Flamingo Mt Kenya, Flamingo Naivasha, Oserian, Kenya Horticultural Exporters (KHE), Tambuzi, Ravine and Simbi Roses. The funds will help develop healthcare and sanitation measures aimed at preventing the spread of Covid-19 and protecting farm workers.

Mr Rupert Thomas, Director of Food and Grocery at Waitrose, said the funds will be used to improve workers' access to essential services and support those on reduced earnings through food packages. "This pandemic poses the greatest humanitarian and economic threat of our generation and, whilst we face many difficult decisions, as a collective industry we must continue to look at ways we can help to protect people and their livelihoods during this unprecedented time," he said.

Since 2017, Farm Africa and the Waitrose & Partners Foundation have been creating better livelihoods for workers and their families that grow, pick and package Waitrose's fresh produce across seven vegetable and flower farms in Kenya.

Farm Africa Project Coordinator Peter Ndungu said the joint project has been improving health and well-being facilities of over 12,000 employees. "The Covid-19 pandemic is hitting Kenyan farm workers hard. The funding from the Waitrose & Partners Foundation will help farm workers to safely implement social distancing and gain access to essential services for their families during the crisis," said Mr Ndungu.

He added: "The measures we have put in place are just the start and we will continue to do everything we can to provide support to our suppliers and the people who form part of them, particularly the most vulnerable." Due to uncertainty around the longer-term impact of Covid-19, the foundation has also reserved emergency funding to provide support to communities and ensure the stability of its supply chain.



CIOPORA Requests UPOV Member States to Implement Support Measures for Breeders Amid COVID-19 Crisis

In an urgent letter to UPOV, CIOPORA has requested that UPOV member states and their competent Plant Variety Protection (PVP) authorities consider implementing measures to assist horticultural breeders across the globe amid the COVID-19 crisis.

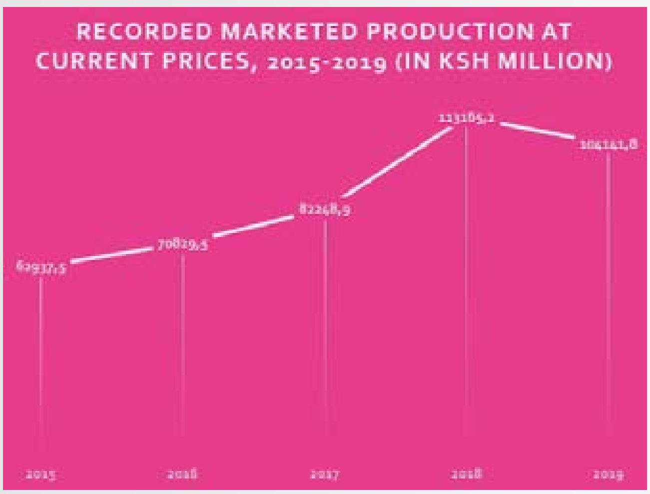
The measures suggested by CIOPORA include an extension of deadlines related to the PBR application proceedings, including the grace periods and the deadlines for the submission of plant material and documentation. Pinpointing that horticultural breeders are heavily hit by the ongoing crisis both due to diminishing demand for propagating material and the general labor restrictions, CIOPORA has also asked the authorities to consider additional financial relief measures such as reduction of DUS examination and other fees or allowing for multiple instalments of fees due to secure cash flow.

In a positive reply from March 30, acknowledging the importance of the plant sector for livelihood of millions across the world, UPOV's Vice Secretary-General Peter Button confirmed that CIOPORA's letter was forwarded to the UPOV member states. He wrote: "We have invited UPOV members to inform CIOPORA of any measures that have been taken, or are planned, to assist breeders in the current situation." CIOPORA Secretary General Dr Edgar Krieger commented: "We very much appreciate the support of UPOV and its members in this critical situation for the green sector. So far, we have received positive replies from CPVO, Chinese MARA, USPTO and USDA and we are confident more offices will follow."

CIOPORA is closely monitoring and collecting information as to PVP-related relief measures implemented by PVP offices. Additionally, utilizing its global lawyer network, the association has launched a COVID-19 resources page comprising in-depth information on aid and regulatory relief for businesses in many countries. Information is published and will be continually updated in the coming days and weeks at CIOPORA.org.

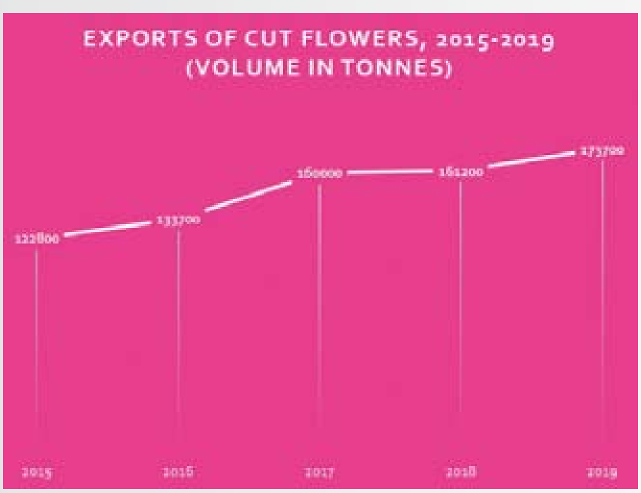
Kenyan cut flower exports: Higher volumes, lower value

The Kenya National Bureau of Statistics (KNBS) has released its Economic Survey 2020, detailing developments in the country's economy over the past five years. According to the bureau, the economic activity in the domestic economy remained vibrant in 2019 although the performance was slower relative to 2018. The real Gross Domestic Product (GDP) grew by 5.4 per cent in 2019 compared to a growth of 6.3 per cent in 2018. The growth, albeit slower than 2018 was spread across all sectors of the economy but was more pronounced in service-oriented sectors.



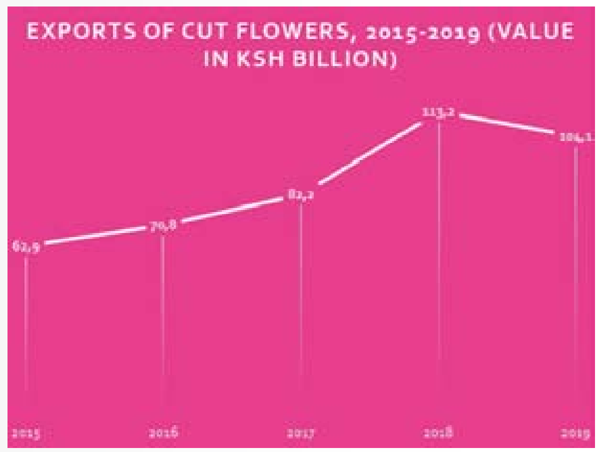
Cut flowers export: Higher volumes

Horticultural activities were mainly supported by growths in output of exported fruits (8.3 per cent) and cut flowers (7.8 per cent) in 2019. However, the volume of vegetables exported declined by 15.2 per cent during the same period owing to unfavourable weather conditions that characterized the first half of 2019, resulting to lower production.



Lower value

During the review period, the value of marketed fresh horticultural produce declined by 5.9 per cent from KSh 153.7 billion [1.43 billion USD] in 2018 to KSh 144.6 billion [1.35 billion USD] in 2019. This was mainly as a result of an 8.0 per cent contraction of the value of cut flowers from KSh 113.2 billion [1.06 billion USD] in 2018 to KSh 104.1 billion [971 million USD] in 2019.



Income cut for important commodity

So while cut flower exports grew in terms of volume, the value of these exports has actually gone down in 2019, compared to the previous year. According to the KNBS, this was attributable to lower prices offered in the international market. With export earnings from cut flowers accounting for 72 percent of total earnings from the country's horticulture exports, it remains to be seen what the Kenyan floriculture industry will look like at the end of 2020, which is already proving to be a tough year due to the COVID-19 crisis.

As Treasure Secretary Ukur Yattani put it when presenting the figures: "The global economy was projected to remain suppressed due to slowdown in industrial output, weak business confidence and increased trade tensions, even before the rapid spread of the Covid-19 pandemic. The weak global economy is likely to negatively impact on Kenya's exports, especially horticultural products, as well as the tourism sector."

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TOG – 6 USE AND APPLICATIONS

55% active Chlorine in the form of Sodium Di-Chloro-ISO-Cyanureate

Application / Use	Required Active Chlorine PPM	Recommended concentration in g/L	Remarks
Treatment of cut flower	50	0.09	Read label
Fruits and Vegetables bath	80-150	0.2-0.35	Declared safe for cut and non cut vegetables
Postharvest Botrytis Dipping	200	0.4	Dip for 10-20 seconds and shake off excess water
Sterilizing Tables buckets and trays	550	1	Clean off any organic residue, and then dip in solution for 30 minutes. For tables, spray with solution. Make sure all surfaces are dry before re-use.
Sterilizing Containers and conveyors	400	0.1	Clean off any organic residue. Scrub surfaces with a soft brush dipped in solution
Cuttings and plants	550	1	If no past experience , make a test run of spraying the plants to observe any phytotoxicity
Cutting for rooting	200-400	0.4-0.8	Quick dips. If no past experience , make a test run to observe any phytotoxicity
Chlorinating Irrigation systems	200	0.4	Add TOG-6 to irrigation system – algaecide

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MIX 1 gram of TOG 6 in for every 1L of clean water to spray on the target surfaces.

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New EU MRLs Highlight the Difficulties in Securing International Consensus on SPS Issues

The EU continues to set and re-set pesticide and fungicide Maximum Residue Level (MRLs) at far stricter levels than internationally agreed standards. ACP exporters serving EU markets have no option but to comply or exit the EU market. Freshfel's call for 'better defined international standards' to facilitate EU fruit and vegetable exports, since uneasily with the unilateral standard setting practiced by the EU, which regularly presents new compliance challenges for ACP fruit and vegetable exporters. This raises important policy issues regarding the EU's role in the de facto setting of international standards and the limitations of SPS chapters and institutional mechanisms established under trade ACP-EU FTAs for ensuring EU markets remain open to ACP products which comply with agreed international regulatory standards

New EU MRL levels are being introduced for the fungicide Imazalil and the insecticide Fipronil. For Imazalil the new MRL was applicable from the 16th April 2020 (with some exceptions), while for Fipronil the new MRL will enter effect from 18th May 2020. After these dates any products exceeding the new MRL cannot be sold on the EU

Growers Must Ensure Timely and Accurate Detection and Intervention of Nutrient Imbalances

The Kenyan floriculture industry has in recent decades grown at an exponential rate. This growth can be characterized by an increase in number of acreage of both indoor and outdoor cut-flowers, direct foreign investment to the industry as well as increased global market share. The flower industry is faced by myriad challenges such as changing climatic conditions, changing market dynamics, pests and disease. Growers therefore need to have relevant technical knowhow to achieve sustainable production.

Working smarter, not harder, to optimize productivity, maximize crop yields with minimal production cost is important. However, this does not happen without diligent efforts to prevent and overcome possible challenges. As a flower producer, how do you exercise the latter? Yield and quality are often considered important parameters to look at in crop production. For these to ensue however, it is important to consider a holistic crop production approach that considers the planting media, irrigation/fertigation water to be used, nutrients that have been absorbed by the plant tissue, crop protection among other parameters.

From an agronomist's point of view, timely and accurate detection and intervention of nutrient imbalances can be achieved through routine soil, substrate, nutritive solutions and water analyses. The routine test results reveal nutrient credits from soil, irrigation/fertigation water and nutrient (stock) solutions. With the latter a good balance between elements in the nutrient solution can be achieved. For growers, it is worth noting that a, better low EC with a good nutrient balance than a high EC with a bad nutrient balance. This is due to the existing complex relationship between elements.

Foliar (tissue) analysis is one among the crucial crop management tools, for example, sometimes media & water analysis alone might not reveal the true picture of what is happening in the root zone. Adding knowledge on market.

For Fipronil approval for its use expired on 30th September 2017 and as a result MRLs for fipronil will 'automatically be set at the limit of determination (LOD) 0.005 mg/kg'. This insecticide is used to control a broad range of insect pests in horticultural crops. This lower limit means Fipronil 'can no longer be used on these crops when the produce is being exported to the EU'.

COLEACP has identified the main ACP export crops which will be impacted by the new MRL for fipronil from 18th May 2020

Main ACP Crops Affected by changes in the MRL for Fipronil

Crop	Current EU MRL (Mg/Kg)	New EU MRL (Mg/Kg)
Broccoli	0.01	0.005*
Cauliflower	0.01	0.005
Onions	0.02	0.005
Other flowering Brassica	0.01	0.005
Shallots	0.02	0.005

* Limit of determination (LOD)

This means that for any of these crops to be placed on the EU market from 18 May 2020, ACP producers will need to have adopted 'alternative control methods', so that crops meet the new MRL requirements.

The situation in terms of the implementation of the regulation on the new MRL for Imazalil, a fungicide mainly used 'for the management of post-harvest diseases such as crown rot in banana' is somewhat different. While the regulation was published on 25th September 2019, following lobbying from EU producers of the most seriously affected European crops a 3-year

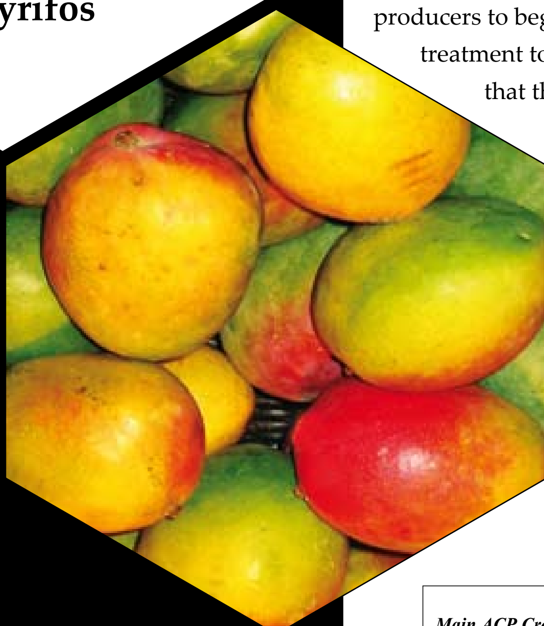
To Page 32

nutrient concentrations and ratios of essential elements found in indicator tissue reflect the true nutritional status of the plant. This it is therefore very important in developing and correcting nutrient program of a plant. During crop walks, often we encounter poor plant vigor despite a balanced nutrient program being implemented; in this case foliar analysis is one of the tools used to establish the cause among others.

Like any other plant, flowers are susceptible to attack by pest and disease causing pathogens. Economic importance of pests and diseases ranges from yield losses, cost of control, aesthetic losses and even environmental impact in the production areas. It is important to understand and differentiate between the two types of plant diseases; those whose primary causal agents are biotic (infectious) and those that are abiotic (not infectious). This would help understand how to target the diseases. The four major groups of microbial plant pathogens (fall under biotic diseases) are fungi, bacteria, nematodes and viruses which have a destructive effect on crop production. Screening and analysis of the growing media before planting is advised given the diverse sources and handling of the materials, while in soil previous land use activities are potential sources of the pathogens. Where either of the agents is suspected, screening of the growing media (soil& substrate) and the plant material is recommended and sometimes DNA check conducted as a diagnosis and the right control measures given.

Correct identification and quarantine of potentially harmful species of nematodes is important to the success of flower production. This is mostly in soil, substrate and irrigation water. Plant-parasitic nematodes attack almost every part of the plant including; roots, stem and leaves which in turn affects quality and quantity of crop yield. Symptoms of Nematode infestation include foliar discoloration when above aground, stunted growth, yellowing of leaves and root galling. As a result, nematodes are recognized as one of the greatest threat to crop production – popularly termed as the unforeseen enemy. Worth noting, apart from being parasitic, nematodes are also vectors of plant diseases and therefore timely control of their spread can reduce economic losses significantly.

Beyond the fungicide Imazalil and the insecticide Fipronil, in mid-February 2020 EU member states also agreed to ban the import of fruit bearing traces of chlorpyrifos



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transition period has been set in place. This is intended to allow time for further studies to be carried out to evaluate the safety of Imazalil. It is claimed the 'EFSA's decision to reduce the MRL for Imazalil…was based on the fact that it did not have sufficient information to be able to complete its risk assessment into the toxicological properties of the fungicide, rather than any express concerns over its safety'.

It is against this background that for certain crops 'the MRL will remain at current levels', notably for mandarins, lemons and limes, 'while for oranges and grapefruit it will be set at 4mg/kg'. Similar transitional arrangements will apply to apples, pears, medlar, bananas and potatoes.

Spanish citrus producers have not abandoned their efforts to ensure continued use of Imazalil after the 3-year transition, with the CEO of the Valencia-based postharvest solutions provider Citrosol, claiming, that given the rigor of EFSA food safety assessments 'if the use of Imazalil is allowed to continue, it's because it has been scientifically proven that it is safe for the consumer, producer and environment'.

Despite the optimism expressed by Spanish fungicide industry representatives, COLEACP is advising ACP producers to begin looking for alternative methods of treatment to the use of Imazalil. It is acknowledged that the change in the MRL for Imazalil will be 'much more difficult for citrus supplied by Southern Hemisphere countries' in light of the 'long shipping time required to reach the European market'.

As with Fipronil, COLEACP has identified the main ACP export crops which will be impacted by the new MRL for Imazalil from 16th April (except for those products subject to the 3-year transition).

Main ACP Crops Affected by changes in the MRL for Imazalil

Crop	Current EU MRL (Mg/Kg)	New EU MRL (Mg/Kg)
Bananas°	2	0.01*
Grapefruit°	5	4
Mango	0.05*	0.01*
Oranges°	5	4
Other Citrus°	5	0.01*
Papaya	0.05*	0.01*
Pineapples	0.05*	0.01*
Potatoes°	3	0.01*
Squashes	0.05*	0.01*
Watermelon	0.05*	0.01*

** Limit of determination (LOD)*

° subject to 3-year transition period

According to COLEACP for bananas setting the new MRL at the limit of determination will mean 'it will no longer be possible to use imazalil for post-harvest treatments on banana destined for the EU-market'.

The Tanzania Horticultural Association is one of many producer groups criticising the EU for establishing MRLs which are substantially below internationally agreed norms. It is claimed the EU MRL levels of 0.01 mg/kg is substantially below the internationally agreed level set at 2.0 mg/kg for many products. Indeed, 'several countries including Côte d'Ivoire, Brazil, India, the US and others have protested and gone ahead to present a formal complaint to the World Trade Organisation', over the EU's decision to lower these maximum residue levels.

Beyond the fungicide Imazalil and the insecticide Fipronil, in mid-February 2020 EU member states also agreed to ban the import of fruit bearing traces of chlorpyrifos. 'Any fruit, imported or otherwise, bearing more than the smallest traceable amount of the pesticide will be banned from sale across the EU'. This followed a toxicological assessment carried out by the EFSA which found damaging genotoxic and neurological effects to foetal and child development. Given pesticide products containing chlorpyrifos have been in use since 1965 pesticide campaigners are arguing lessons need to be drawn from the chlorpyrifos experience so that 'an approval of pesticides based on incorrect conclusions in industry-funded studies is not repeated'.

Any fruit, imported or otherwise, bearing more than the smallest traceable amount of the pesticide will be banned from sale across the EU.

These EC measures and the debates they generate need to be seen in a context where European fruit and vegetable producers (Freshfel) are urging the EC to take urgent action to remove unnecessary SPS barriers to EU fruit and vegetable exports. This issue was systematically raised at the July 2019 EC Market Access Working Group meeting where discussions were focussed on the trade dimensions of SPS controls. It was maintained there needed to be 'better defined international standards for the treatment of pests' in order to 'improve EU fruit and vegetable export conditions and boost exports'. It was maintained 'most EU trade partners operate under a "detrimental closed system" for biosecurity and plant health protection', which 'requires EU producers and exporters to gain access to new markets product-by-product and country-by-country'. This was seen as involving lengthy, non-transparent and costly processes of approval.

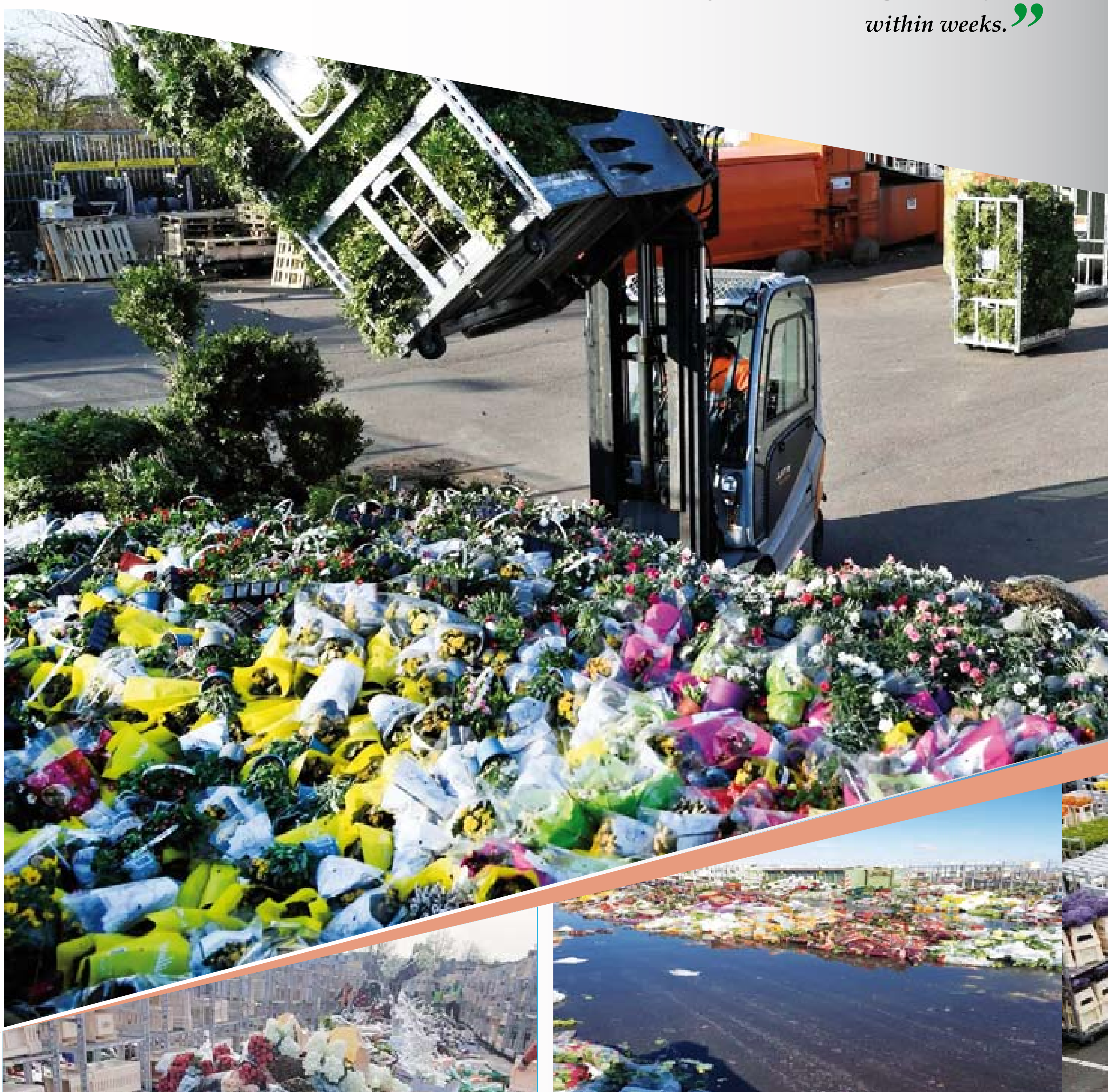
Freshfel took the view the establishment of 'better defined international standards for the treatment of pests', would help facilitate access for EU fruit and vegetable exporters.

In addition, Freshfel called for the European Commission to make greater use of the SPS Chapters in EU Free Trade Agreements to secure the opening of 3rd country markets to EU exports. Specifically, it proposed the SPS protocols of EU FTAs should be used to:

1. Establish 'fast track' procedures for SPS approvals.
2. Secure the abolition of pre-clearance requirements.
3. Allow the use of member states' group applications for SPS approvals.
4. Establish a system for the exchange of lists regarding pests of concern and facilitation of pre-export audits.

At the July 2019 meeting Freshfel expressed full support for EC efforts to 'fully enforce FTA provisions and step up economic diplomacy to promote EU exports through new tools such as the Foreign Policy Instrument'.

"The coronavirus is forcing Dutch flower growers to compost millions of blooms at what should be the pre-Mothers' Day demand peak, their industry association said, warning that many members could go bankrupt within weeks."



Flower Growers Composite Millions of Blooms

"The market situation is dramatic," Steven van Schilfgaarde, director of Royal FloraHolland, said in a statement, adding that flower prices have nearly halved.

"Over 20 percent of the supply had to be destroyed because there were no buyers. Forecasts for the next weeks are even worse," he said.

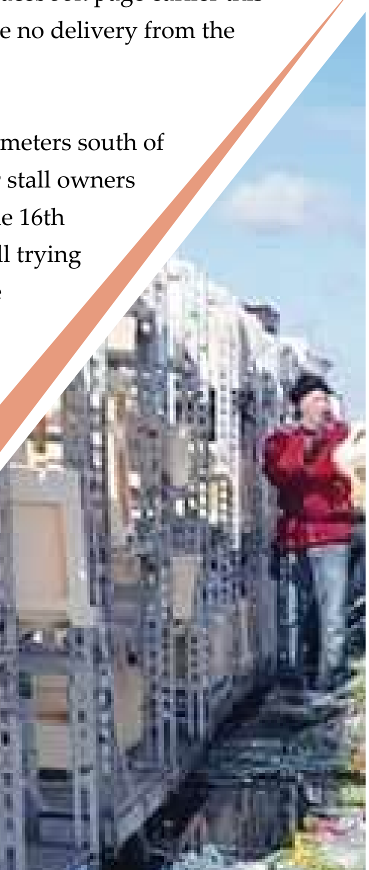
This period is usually peak season for flower sales because of Mother's Day celebrations in the United Kingdom and Ireland.

FloraHolland usually auctions 30 million plants and flowers a day, worth some 8.8 million euros ($9.8 million).
The Dutch floricultural industry employs 150,000 people, and around 35 percent of global flower and plant exports, worth 6.2 billion euros a year, pass through the Netherlands.

On Friday the Keukenhof flower park, a top tourist attraction in the Netherlands which sees over a million visitors each year, announced it would not open.

Dutch florist Paul Deckers, who has supplied flowers for the Pope's annual Easter address in St. Peter's Square for the past 34 years, posted on his Facebook page earlier this week that there would be no delivery from the Netherlands this year.

In Paris, around 475 kilometers south of The Hague, some flower stall owners at a market in the upscale 16th arrondissement were still trying to sell their merchandise early on Sunday despite pressure from the police to close down.



Global trends in the crop prot

With the world's human population expected to re by 2050 and the negative impact of climate change maintenance of a stable global food supply is und

Industry trends (***company consolidation, regulatory trends***)

As mentioned above, even though the crop protection market has grown significantly, leading agrochemical companies have entered a period of significant consolidation. There were more than ten major agrochemical companies in the United States (US) and Europe in 1990, but the number of these business entities dropped to six majors by 2009 through mergers and acquisitions (M&A), namely Syngenta, Bayer, BASF, Dow Chemical, DuPont and Monsanto. These six companies subsequently reorganized in response to poor business performance, the surge of R&D expenses due to tighter regulations on new agrochemical registration, expectations from stock holders for the realization of a new growth strategy and other factors. Most recently, through further consolidation activities, the six majors are now down to Bayer, DowDuPont (now Corteva), BASF, and Syngenta, which is now under the umbrella of the China National Chemical Corporation (commonly known as ChemChina). In 2017, FMC Corporation acquired a sizable portion of DuPont's crop protection business and R&D assets that DuPont had divested upon a merger with Dow Chemical. As such, the crop protection market has entered an age of five major players; that is, the abovementioned four

ection industry

each nearly 10 billion
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er significant threat.

companies plus FMC Corporation.

From here, we examine the situation of agrochemical R&D and the impetus behind the corporate reorganization and consolidation from several perspectives.

The first involves reaffirming the contribution of agrochemicals to agricultural production. According to an article written in 2006, maximum achievable yields in rice, wheat, maize and soybean may decrease by ca. 20–50% without the proper use of agrochemicals. On the other hand, using agrochemicals can recover the yield by up to 60–70%. Thus, it is clear that the current level of crop production is attainable only with appropriate use of agrochemicals, without which the crop yield would drop dramatically. The same article also explains that more effective use of agrochemicals could lead to a further increase in crop yield, creating expectations for further technical improvement.

While agrochemicals have been making a huge contribution toward the enhancement of crop productivity as just described, it is becoming ever more difficult to develop agrochemicals. It takes over ten years and R&D expenditure of $100–350 million to develop and market a new agrochemical, and the process involves: discovering a new agrochemical candidate; conducting safety studies, biological studies, and formulation research in parallel; comprehensively evaluating the results from these studies; and finally applying for and obtaining registration as an agrochemical. Moreover, because of various factors mentioned later, currently the probability of obtaining a new agrochemical is estimated as one in around 160 thousand compounds. As such, each company developing agrochemicals has to invest 7–10% of its sales in R&D activities every year. What is more, the cost and time required to develop agrochemicals have been increasing each year. For example, in 1995, the development expense was 152 million dollars and R&D time was 8.3 years; however, according to a survey conducted from 2010 to 2014, these same metrics increased to 286 million dollars and 11.3 years, respectively, suggesting that such a hike in the R&D burdens is one of the factors driving consolidation of companies involved in agrochemical R&D as mentioned above.

Furthermore, “development” costs are rising quickly for environmental and toxicity studies, and field trials, which are conducted in the latter stages of development. The impetuses behind these cost increases are a growing demand for safer agrochemicals and tightening regulations by relevant authorities. As if reflecting recent difficulties in agrochemical

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R&D activities, the number of new agrochemicals launched into the market peaked in the 1990s and has declined since the 2000s, illustrating the harsh conditions for new agrochemical development.

Nevertheless, even in this difficult environment for agrochemical R&D, research activities at Japanese agrochemical companies remain relatively strong. Although sales by the Japanese companies are smaller than those by the major players in the US and Europe, ten Japanese companies have ranked within the top twenty with the highest numbers of newly marketed products (from 1980 to 2016). During the same period, among the 363 newly marketed agrochemicals worldwide, 114 (31%) were developed by Japanese companies. Even in the ever tougher environment for R&D, for example, in 2016, Japanese companies accounted for approximately 40% of the later R&D stage agricultural chemicals. Thus, it is safe to conclude that the R&D capability of Japanese companies to launch new chemicals is very high and comparable to that of the leading companies in the US and Europe.

The application rates of agrochemicals, which require a lot of time and effort to market, were ca. 2,400 g of active ingredient per hectare (gai/ha) for herbicide, ca. 1,700 gai/ha for insecticide, and ca. 1,200 gai/ha for fungicide in the 1950s. By the 2000s, however, these application rates declined to 60–180 gai/ha,8) clearly demonstrating the superior performance (increased activity) of active ingredients in newly developed agrochemicals. Safety was another beneficiary; around 1960 in Japan, about the half of the agrochemicals were categorized as Specified Poisonous Substances or Poisonous Substances. However, by 2014, the number of such agrochemicals decreased sharply and nowadays nearly 90% of agrochemicals are categorized as Ordinary Substances.

Furthermore, many biological pesticides are currently under development that are supposed to have less impact on the environment and a better safety profile (a biological pesticide is defined as a pesticide whose active ingredients are derived from living organisms. In a narrower sense, this includes only living things themselves, such as natural-enemy insects, while in a broader sense, the definition can also include substances extracted from microorganisms and the like. A review of new crop protection products marketed by year revealed that the number of chemical pesticides gradually began to decline from the 1990s, whereas the number of biological pesticides started to increase from the 1980s and averaged approximately ten new biological pesticides have entered the market per annum from the 1990s to the present.

It is noteworthy, however, that the market size for biological pesticides is still relatively small, accounting for 5.6% of the whole crop protection market in 2016, revealing that sales of individual products are only modest.

The Coronavirus Floristry Industry Insight

Floriculture Magazine focuses on the impact of the coronavirus on the floristry industry in Kenya. This time the spotlight is on in-house florists. Thank you so much to Millicent Achieng Ogola. I hope you enjoy reading her thoughts.

What has been the impact of the coronavirus on your job?

As in most cases of every other florist I know, my working life has come to a complete standstill. All events, weddings, workshops and my own freelance projects have been postponed.

It's frustrating but compared to those on the frontline or those who have lost their livelihoods, it'll be ok. I'm lucky enough to have been furloughed. So I have the prospect of a job to go back to, which keeps me motivated.

This is the first time in 7 years I have not seen flowers every day. And it's surprising how much that has had an impact on me. It's deeply saddening to know so many growers have lost business. My routine of getting up early (which I'm addicted too), meeting with the amazing suppliers who bring the flowers to me, planning the day ahead with my team, meeting interesting clients from, being constantly creative has now gone.

And with that a part of your identity goes too, which is hard to get your head around. I'm glad there is more acceptance on mental heath. And particularly women's mental health because I feel there are lots of us right now who are feeling the anxiety of what lies ahead. But the isolation has also given me time to reflect on my life before lockdown. And it's enabled me to question how we can progress as a society.

The crisis has shown that as human beings we have great capacity for kindness. And perhaps this wasn't as visible before. It's also satisfying to know we can exist quite simply and successfully without all the detritus we thought we needed, that we were told we needed, in order to be happy. It's been enormously humbling. I'm happy, for now, in my garden just watching my dog and thinking up new designs and possibilities in my head.

What are your plans for the next few weeks?

I had planned to work at my farm a for the next 8 weeks to help them my staff, as I want to stay productive. But having been caught by the Nairobi lockdown in the city changed my plans as I wasn't sadly allowed to tracel. I'll keep a routine which involves a very long walk daily to keep fit. I'm averaging around 10 miles a day, reading, talking to friends as much as possible. And trying not to drink my body weight.

What advice would you give to in-house florists during these challenging times?

None. Who I am to give advice to anyone? All I can say is that if you're lucky enough to have been furloughed, then all you can do is try and see this time as positive. And look forward to all the amazing things you can make when lockdown is reduced. Stay busy, be kind to yourself. And don't put any pressure on yourself at the moment to be productive all the time. A day when you just watch films and gorge on hummus is more than ok in my book!

Make the Right Personnel Decisions Now to Thrive After the Crisis

Senior executives are now rightly worried about what the crisis and subsequent downturn mean. While the concern is understandable, leaders must remember that downturns can be a great time to grow. The challenge, therefore, is not just to get through this period but to survive it in such a way that you can reset in order to thrive. That depends on decisions you have to take now — and many of the right ones may not be the obvious ones.

To be sure, you'll have to do the basics, which are mostly about making sure you have enough cash on hand to stay in business. The playbooks for that don't need rehearsing here. But pretty quickly, you're going to have start making decisions about your people — and that's when things really get strategic. Your people decisions will fall into four categories:

Repurposing

Your first step (once you're sure you can actually stay afloat) should be to look at which parts of the business (plants, lines, people) are paused right now that you could quickly repurpose. Why is this strategic? Simple: thinking about what else your people can do in a crisis opens your eyes to possible strategic adjacencies and partnerships for after the crisis.

Start by thinking about what your country or community might need to help them get through the crisis. In the U.K., Formula One teams are switching plants to making ventilators. In France, perfume giant LVMH is re-purposing to making hand sanitizer. In the US, Tito's vodka is repurposing to making hand sanitizer and giving it away for free. Companies with home sewing networks are turning them to making masks.

Repurposing can also take the form of borrowing and lending your people. If you run a chain of retail stores that has been forced to close shops, can your employees be sent to work temporarily in another company? One fast fashion retailer in the U.K. is allocating 5,000 employees they would otherwise have to have furloughed to a grocery store. Do you have delivery drivers who used to deliver supplies to restaurants who could instead deliver similar products for other companies to shared kitchens or homes? Ask yourself if you should be on the sending or receiving end of employee borrowing, and if so, with whom?

Engagement

No prizes for guessing why this is strategically important. Part of getting through the survive phase is bringing your employees along with you and ensuring there is clear, consistent communication and frequent check-ins. This communication should be for wellbeing and updates, not micromanagement (not everyone can work an eight-hour day while home-schooling elementary children).

How this is managed depends on the state your business is in right now: constant and frantic (food delivery, grocery, collaboration software); paused and possibly panicky (leisure and hospitality); or significantly slowed down but otherwise functioning (many industries right now). If you have a mix of these situations, make sure your communications are consistent, but also tailored to each group.

I advise nominating one person to "own" the employee pulse during the next three to six months — employee engagement and well-being needs to be in one person's hands. In larger companies, there should be someone for each business unit. Preferably that person should not be the CEO, for whom it will likely become just one more thing on the list that will get skipped. The company cannot afford for that to happen right now. And do not default to your head of HR. Look for someone that people feel can empathize with them and who has credibility.

As CEO, check in daily or twice weekly with your pulse owner to get a sense of how the employees are doing, address any issues escalated to you, and make sure that people know exactly how you've acted on them. Above all, remember that communicating in bland generalities about change and uncertainty only scares people and erodes your credibility to lead through the crisis.

Learning, learning, learning

Now is not the time to flatten the learning curve — the winners will be those that steepen the learning curve this year. Learning is something too often skipped during the survive phase, but will set apart those that will thrive.

For workers not engaged in business-critical operations and not furloughed, you should encourage cross-department learning. The sales team should still be communicating with customers and selling, but as they are no longer traveling, they should also have a few more hours a week than usual. Can they spend this time with customer service people to better understand your ideal customer profiles or help build a customer program? Make a list of learning needs departments have been requesting and use this time to address them.

As you do this, push people to go beyond the basics by asking them to think how each aspect of your company's value chain will be challenged now and going forward. Not doing this signals that you assume everything will switch back to January 2020 when we can return to work, which no one believes. Again, no prizes for guessing the strategic importance of this.

Letting people go

Yes, you will likely have to do this in the coming months, with pressure growing as lockdowns and other severe measures get extended. Layoffs are hard and emotionally trying, but facing up to them is part of your job as a leader. Protecting your balance sheet and staying in business must be your overriding concern. If doing so entails making layoffs, it is your duty to do so — if you do not, you put the company's financial viability at risk and everybody working for you could be without a job.

Make sure you really understand unit economics before you lay anyone off. Evaluate by solution, market, or customer segment to decide what to stop, pause and slow given current demand — and let those decisions determine if and where you should be making cuts.

If you do need to make layoffs, do them at once and early. You need to be in a position to reassure your remaining employees that the cut was the only one you foresee now. Working for a company with multiple rounds of layoffs is demoralizing and painful and will only bleed the employees you want to keep. This is a terrible time to let workers go, so if it must be done, be as humane and generous as possible.

You cannot always protect jobs, but you can protect people, who are, after all, often your most strategic asset. Review your country's current response mechanism, as many offer significant payments of employee wages if no layoffs happen. Re-review your repurposing or borrowing options. If this is not enough, your first options should be contract workers or agencies, employees nearing retirement, or those who may be more ready to take an early exit. Furlough if necessary, with the best benefits you can provide, and provide exceptional references that can take into the next opportunity.

Kenya Airways and Air France KLM Martinair Cargo in Cabin to cushion Flower Growers

With the Dutch embassy extending support to the Kenyan horticulture industry, Kenya Airways Cargo boosted up its operation of transporting 40 tonnes of flowers and vegetables to Amsterdam. As part of the initiative to support Kenya's renowned horticultural industry, the airline supported by the Fresh Produce Exporters Association of Kenya (FPEAK), Kenya Flower Council, Embassy of the Kingdom of the Netherlands in Kenya, the European Union in Kenya, and the government of Kenya - more flights are being planned in the coming weeks.

Flying its first B787 Dreamliner as cargo-only flight to Johannesburg (medical supplies and essential goods) and followed by another flight to London (40 tonnes of fresh produce) this month.

Air France KLM Martinair Cargo also started operating cargo flights delivering 45-50 tonnes of cargo from Nairobi to Amsterdam. KLM's B777-300 passenger aircraft been used has ample belly capacity. This comes in addition to the existing full freighter flights Air France KLM Martinair operates regularly. The exports were dominated by cut flowers and other perishable products, inclusive of vegetables and fruits from Kenya to the Netherlands.

Netherlands for the last five years in a row has been ranked as the largest European market for Kenyan exports. It is also the largest export market for Kenyan products in Europe and the leading destination for Kenya's cut flowers, vegetables, and fruits.

Cargo-in-Cabin in practice

KLM's new, albeit temporary cargo carrying concept was developed by a multidisciplinary team within a three-week timeframe. Executive Vice President Air France-KLM Cargo Adriaan den Heijer:

"Developing and implementing this concept is a particularly complex necessity. Safety plays a pivotal role. Each and every package must be bound securely to the seat to ensure it remains in place throughout the flight. But practical matters have to be taken into account too, such as swiftly and safely loading the cabin cargo without damaging the interior. This process is especially labour intensive; current expectations are that this will take at least four hours." To ensure that everything goes off smoothly, all such flights will be accompanied by a Cargo-in-Cabin coordinator from KLM Cargo to maintain onsite loading supervision and monitor compliance with the new procedures.

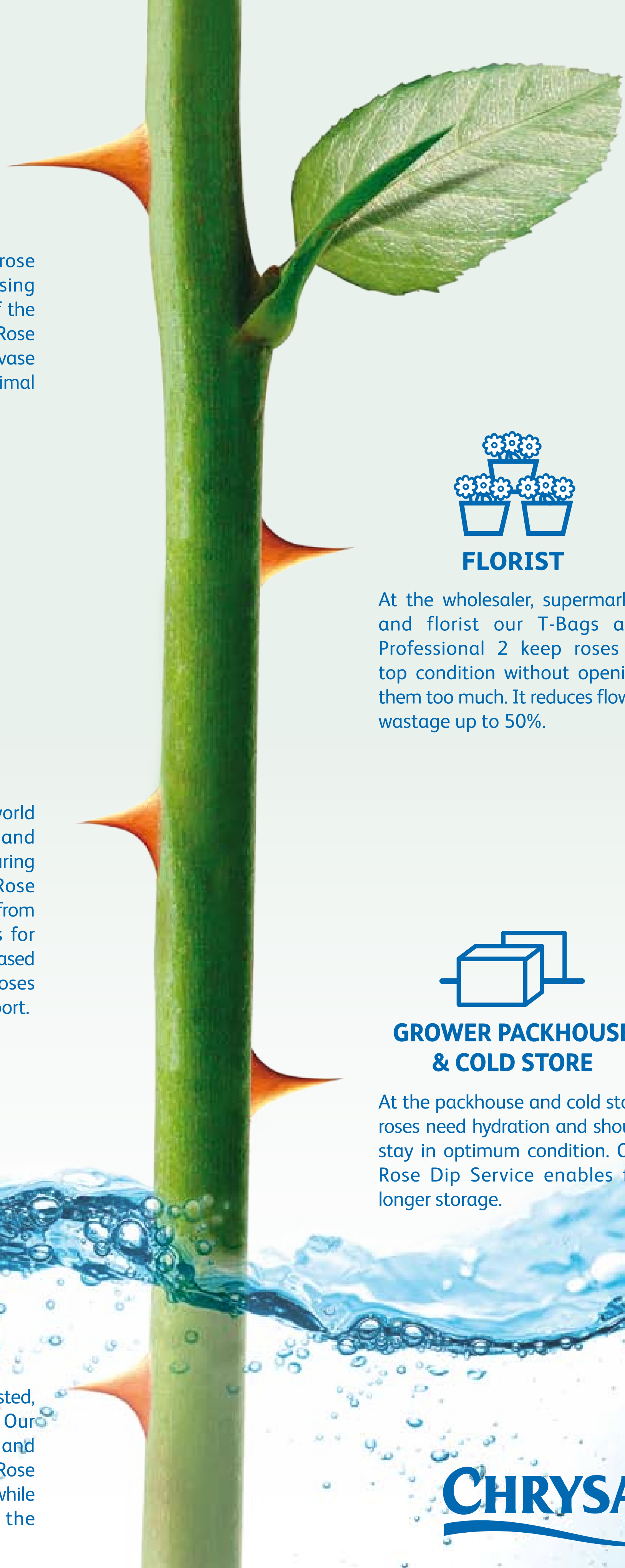
Added space

"Cargo-in-Cabin significantly increases capacity. What we can now accommodate in the cabin equates to around six large pallets in the belly or 40% of the total cargo capacity," explains Den Heijer, adding: "We can use the added space to our advantage, carrying more urgent medical supplies. Cargo-in-Cabin caters perfectly to the growing demand for such equipment."


FRESH VEGETABLES

AT HOME

Every consumer wants their rose to last as long as possible. Using Chrysal products at every step of the journey will ensure this. Chrysal Rose specialty flower food increases vase life up to 60% and ensures optimal flower development.



FLORIST

At the wholesaler, supermarket and florist our T-Bags and Professional 2 keep roses in top condition without opening them too much. It reduces flower wastage up to 50%.

TRANSPORT

Roses are shipped all over the world for longer or shorter periods and keeping them in top condition during transport is a challenge. Our Rose Dip Service aims to prevent roses from developing Botrytis and allows for longer storage and travelling increased distances. Our Freshliner keeps roses fresh without water during transport.

GROWER PACKHOUSE & COLD STORE

At the packhouse and cold store roses need hydration and should stay in optimum condition. Our Rose Dip Service enables for longer storage.

GROWER

From the moment they are harvested, roses start to lose their vitality. Our RVB Clear boosts water uptake and prevents bent-neck. Our unique Rose Dip Service will prevent Botrytis, while AVB can protect roses against the effects of ethylene damage.

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