

## Effect of COVID-19 on the seed sector in Asia

As of Apr 14, 2020

Effect of COVID-19 Survey results		Company Size		Grand Total				
		< 100 Employees		≥ 100 Employees				
		No. of Respondent	%	42	26	68		
		61.8%		38.2%		100.0%		
Aspect...		Number	%	Number	%	Number	%	
a.Demand/sales of	flower / ornamental plant seeds	Strong Negative Effect	4	9.5%	6	23.1%	10	14.7%
		Moderate Negative Effect	4	9.5%	2	7.7%	6	8.8%
		Small Negative Effect	2	4.8%	1	3.8%	3	4.4%
		No Effect (or Unclear Effect)	3	7.1%	3	11.5%	6	8.8%
		Positive Effect	1	2.4%	0	0.0%	1	1.5%
		N/A	28	66.7%	14	53.8%	42	61.8%
		<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>
	vegetable seeds	Strong Negative Effect	10	23.8%	6	23.1%	16	23.5%
		Moderate Negative Effect	12	28.6%	11	42.3%	23	33.8%
		Small Negative Effect	13	31.0%	6	23.1%	19	27.9%
		No Effect (or Unclear Effect)	2	4.8%	1	3.8%	3	4.4%
		Positive Effect	1	2.4%	0	0.0%	1	1.5%
		N/A	4	9.5%	2	7.7%	6	8.8%
		<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>
	field crop seeds	Strong Negative Effect	4	9.5%	4	15.4%	8	11.8%
		Moderate Negative Effect	6	14.3%	8	30.8%	14	20.6%
		Small Negative Effect	1	2.4%	4	15.4%	5	7.4%
		No Effect (or Unclear Effect)	7	16.7%	1	3.8%	8	11.8%
		Positive Effect	1	2.4%	0	0.0%	1	1.5%
		N/A	23	54.8%	9	34.6%	32	47.1%
		<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>
	other types of seeds	Strong Negative Effect	5	11.9%	3	11.5%	8	11.8%
		Moderate Negative Effect	2	4.8%	5	19.2%	7	10.3%
		Small Negative Effect	2	4.8%	4	15.4%	6	8.8%
No Effect (or Unclear Effect)		4	9.5%	1	3.8%	5	7.4%	
Positive Effect		1	2.4%	0	0.0%	1	1.5%	
N/A		28	66.7%	13	50.0%	41	60.3%	
<b>Grand Total</b>		<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>	

Effect of COVID-19 Survey results	Company Size		< 100 Employees		≥ 100 Employees		Grand Total	
	No. of Respondent		42		26		68	
	%		61.8%		38.2%		100.0%	
Aspect...	Number	%	Number	%	Number	%	Number	%
b. International seed shipments	Strong Negative Effect	18	42.9%	13	50.0%	31	45.6%	
	Moderate Negative Effect	10	23.8%	10	38.5%	20	29.4%	
	Small Negative Effect	7	16.7%	0	0.0%	7	10.3%	
	No Effect (or Unclear Effect)	2	4.8%	0	0.0%	2	2.9%	
	N/A	5	11.9%	3	11.5%	8	11.8%	
	<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>	
c. Domestic seed shipments	Strong Negative Effect	4	9.5%	4	15.4%	8	11.8%	
	Moderate Negative Effect	10	23.8%	9	34.6%	19	27.9%	
	Small Negative Effect	17	40.5%	8	30.8%	25	36.8%	
	No Effect (or Unclear Effect)	5	11.9%	4	15.4%	9	13.2%	
	N/A	6	14.3%	1	3.8%	7	10.3%	
	<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>	
d. Purchase/delivery of inputs for seed farm or factory	Strong Negative Effect	8	19.0%	4	15.4%	12	17.6%	
	Moderate Negative Effect	12	28.6%	8	30.8%	20	29.4%	
	Small Negative Effect	14	33.3%	10	38.5%	24	35.3%	
	No Effect (or Unclear Effect)	6	14.3%	3	11.5%	9	13.2%	
	N/A	2	4.8%	1	3.8%	3	4.4%	
	<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>	
e. Availability of labor for seed production/processing	Strong Negative Effect	3	7.1%	7	26.9%	10	14.7%	
	Moderate Negative Effect	18	42.9%	9	34.6%	27	39.7%	
	Small Negative Effect	12	28.6%	6	23.1%	18	26.5%	
	No Effect (or Unclear Effect)	6	14.3%	3	11.5%	9	13.2%	
	N/A	3	7.1%	1	3.8%	4	5.9%	
	<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>	
f. Access to finance (e.g. new loans)	Strong Negative Effect	5	11.9%	2	7.7%	7	10.3%	
	Moderate Negative Effect	6	14.3%	5	19.2%	11	16.2%	
	Small Negative Effect	9	21.4%	8	30.8%	17	25.0%	
	No Effect (or Unclear Effect)	9	21.4%	4	15.4%	13	19.1%	
	Positive Effect	4	9.5%	0	0.0%	4	5.9%	
	N/A	9	21.4%	7	26.9%	16	23.5%	
	<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>	
g. Other aspect	Strong Negative Effect	7	16.7%	4	15.4%	11	16.2%	
	Moderate Negative Effect	6	14.3%	4	15.4%	10	14.7%	
	Small Negative Effect	3	7.1%	2	7.7%	5	7.4%	
	No Effect (or Unclear Effect)	5	11.9%	1	3.8%	6	8.8%	
	Positive Effect	2	4.8%	1	3.8%	3	4.4%	
	Not Identify	19	45.2%	14	53.8%	33	48.5%	
	<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>	

**Bottlenecks occurred when the international seed movement As of Apr 14, 2020**

Effect of COVID-19 Survey result		Company Size < 100 Employees		≥ 100 Employees		Grand Total		
		No. of Respondent		26		68		
		%		38.2%		100.0%		
Aspect...		Number	%	Number	%	Number	%	
Unusual difficulties/ delays in	a. Volume of new export orders	Has become a problem	12	28.6%	10	38.5%	22	32.4%
		Is likely to become a problem	14	33.3%	6	23.1%	20	29.4%
		Is not a problem	8	19.0%	2	7.7%	10	14.7%
		Not Identify	8	19.0%	8	30.8%	16	23.5%
		<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>
	b. Physical preparation of seed shipments for export	Has become a problem	12	28.6%	4	15.4%	16	23.5%
		Is likely to become a problem	9	21.4%	10	38.5%	19	27.9%
		Is not a problem	14	33.3%	6	23.1%	20	29.4%
		Not Identify	7	16.7%	6	23.1%	13	19.1%
		<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>
	c. Acquiring export permits	Has become a problem	7	16.7%	6	23.1%	13	19.1%
		Is likely to become a problem	8	19.0%	7	26.9%	15	22.1%
		Is not a problem	19	45.2%	8	30.8%	27	39.7%
		Not Identify	8	19.0%	5	19.2%	13	19.1%
		<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>
	d. Acquiring import permits	Has become a problem	8	19.0%	11	42.3%	19	27.9%
		Is likely to become a problem	11	26.2%	6	23.1%	17	25.0%
		Is not a problem	16	38.1%	3	11.5%	19	27.9%
		Not Identify	7	16.7%	6	23.1%	13	19.1%
		<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>
	e. Phytosanitary Certification	Has become a problem	12	28.6%	7	26.9%	19	27.9%
		Is likely to become a problem	9	21.4%	6	23.1%	15	22.1%
		Is not a problem	14	33.3%	9	34.6%	23	33.8%
		Not Identify	7	16.7%	4	15.4%	11	16.2%
		<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>
	f. Finding air/ocean/land freight	Has become a problem	17	40.5%	14	53.8%	31	45.6%
		Is likely to become a problem	13	31.0%	6	23.1%	19	27.9%
		Is not a problem	7	16.7%	0	0.0%	7	10.3%
Not Identify		5	11.9%	6	23.1%	11	16.2%	
<b>Grand Total</b>		<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>	
g. Getting customs clearance at port of entry	Has become a problem	12	28.6%	11	42.3%	23	33.8%	
	Is likely to become a problem	14	33.3%	6	23.1%	20	29.4%	
	Is not a problem	9	21.4%	5	19.2%	14	20.6%	
	Not Identify	7	16.7%	4	15.4%	11	16.2%	
	<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>	
h. Storage at port of entry	Has become a problem	12	28.6%	9	34.6%	21	30.9%	
	Is likely to become a problem	12	28.6%	7	26.9%	19	27.9%	
	Is not a problem	11	26.2%	4	15.4%	15	22.1%	
	Not Identify	7	16.7%	6	23.1%	13	19.1%	
	<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>	
i. Seed distribution in destination country	Has become a problem	13	31.0%	11	42.3%	24	35.3%	
	Is likely to become a problem	14	33.3%	10	38.5%	24	35.3%	
	Is not a problem	8	19.0%	1	3.8%	9	13.2%	
	Not Identify	7	16.7%	4	15.4%	11	16.2%	
	<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>	
j. Other area	Has become a problem	6	14.3%	3	11.5%	9	13.2%	
	Is likely to become a problem	7	16.7%	1	3.8%	8	11.8%	
	Is not a problem	10	23.8%	2	7.7%	12	17.6%	
	Not Identify	19	45.2%	20	76.9%	39	57.4%	
	<b>Grand Total</b>	<b>42</b>	<b>100.0%</b>	<b>26</b>	<b>100.0%</b>	<b>68</b>	<b>100.0%</b>	

Company Size	Main Country/Territory of Operations	3. What are some of the solutions/measures your company has implemented in the immediate (short) term to address the challenges (non-competitive practices you are willing to share anonymously with other companies)?
≥ 100 Employees	Bangladesh	We are trying to fulfilling few local demand through taking different types of protection measuring in distribution level. Taking few short & long term plan to fulfill the demand of farmers and our team also working for facing this challenges. Time to time sharing the updated market status with other seed companies of the association. We always connected with our Management, employees & stakeholder through different types of media.
≥ 100 Employees	Bangladesh	Constant contact with suppliers and freight forwarders to find a option to import and export. Further we are revising our orders to bring in excess stock for 6 months not knowing when this global crisis will end.
≥ 100 Employees	India	We are complying with administrative orders and most of our office work has shifted to online mode. Transporting seeds though in bulk is still possible but as majority of vegetable seeds supply used to happen through courier and courier are not currently working has affected our sales. We are looking for alternate options but yet to arrive on some solutions.
≥ 100 Employees	India	Some of the seed companies have come together and helping each other to transport seeds and reach the destination.
≥ 100 Employees	India	Instilled confidence in labours about our safety process at farms and plants. Trying to use other mode of transports.
≥ 100 Employees	India	We are following the directives of Government both in terms of Safety SOP as well as proactively putting the required measures. Our processing plants are running at around 70-80% of capacity and hopefully we will be able to service the markets in time, However further shipments to the smaller markets is a challenge because of transportation, labour and restricted timing.
≥ 100 Employees	Korea South	<ul style="list-style-type: none"> <li>* Keep monitoring the market situation in each areas and communicating with the customers</li> <li>* Looking for a new route for the seed shipments to the customers</li> <li>* Pre-booking for the space of vessel or flight</li> <li>* Negotiate the freight cost with shipping agent</li> </ul>
≥ 100 Employees	Thailand	As the situation of the outbreak is evolving quickly and there are changes in situation almost everyday, therefore, the company has closely monitored the situation in each country but do not have specific approaches to tackle the challenges.
≥ 100 Employees	Thailand	Reach out to relevant government authorities through the national seed association to seek exemption from restricted movement of seeds and other farm inputs and agribusiness personnel and secure necessary IDs and food/green lane passes. Assign two shifts of skeletal force.
≥ 100 Employees	Thailand	Manage to have our domestic stock in Grade A customer store in advanced with special agreement.

Company Size	Main Country/Territory of Operations	3. What are some of the solutions/measures your company has implemented in the immediate (short) term to address the challenges (non-competitive practices you are willing to share anonymously with other companies)?
≥ 100 Employees	Vietnam	<p>ThaiBinh Seed hasn't been affected much to the result of trading seeds yet. However, ThaiBinh Seed have to give some solutions to overcome the difficulties at this time such as:</p> <ul style="list-style-type: none"> <li>- To execute regulations of state in pushing back Covid-19.</li> <li>- Join hands with the Government to push back Covid-19.</li> <li>- Provide solutions to replace the work that needs to be done to fit the situation: <ul style="list-style-type: none"> <li>• Working online through internet to ensure the rate of progress.</li> <li>• Up to now, In producing and purchase seeds from production region has been affected a little at the same time as the request of isolation society. ThaiBinh Seed have prepare labour safety for the staffs who carry out purchasing to be safe about health.</li> <li>• Sales: ThaiBinh Seed are preparing to supply seeds for farmers but we are worried if Covid-19 become badly, it seems to be difficult in supplying seeds to</li> </ul> </li> </ul>
< 100 Employees	Australia	<p>There is not much we can do at this time. Our government is willing to help importers, but not exporters with the problem of delayed access to phytosanitary certificates and original documents for customs clearance in countries of destination. They tell us that is our problem. They have suggested placing Phytosanitary Certificates inside of the Shipping Containers instead of sending them via courier which we always do. You would never place a phyto inside a container. Unbelievable. Plus we cannot often get the phyto before the container is sealed. We often have to wait for them. This is not a viable option.</p>
< 100 Employees	Bangladesh	<p>Can't take any action right now. Because most of the things are locked down</p>
< 100 Employees	Bangladesh	<p>We r just trying to negotiate in mail for such problems becuz agriculture is time based and seed is is always risky to keep outside in normal condition.</p>
< 100 Employees	China	<p>keep contacts with customers by network tools make preparations in advance</p>
< 100 Employees	China	<p>Launch online promotion and enhance email communication</p>
< 100 Employees	China	<p>Adjust the Q'ty and price condition by situation. For international seed shipment, have to get confirmation in advance from both sides.</p>
< 100 Employees	Hong Kong SAR	<p>Sales is not a big problem for us. Whereas product development and breeding have become a big problem. Breeders and product managers cannot travel to sites of trials and their work basically stopped. Customers cannot come to see trials. We are trying to make video of trails to send to customers and do video conferencing for our internal work.</p>
< 100 Employees	India	<p>Use of local manpower and distributors</p>
< 100 Employees	India	<p>Try to negotiate with different GOVERNMENT agency to get necessary permission and orders.</p>
< 100 Employees	India	<p>Paddy processing schedule was Pushed forward to a later date of April 15th expecting some improvement in the labour movement. Conducting Grow Out Tests for vegetable seed lots - were to be replanted. Raising of paddy nursery for summer planting was deferred.</p>

Company Size	Main Country/Territory of Operations	3. What are some of the solutions/measures your company has implemented in the immediate (short) term to address the challenges (non-competitive practices you are willing to share anonymously with other companies)?
< 100 Employees	India	With skeleton staff, we are readying some seeds against orders and awaiting transport to come out of lockdown , so it can be dispatched at the earliest possible.
< 100 Employees	India	Obtained permission for supply chain operations to a minimum so that April May seed supplies you market can be close to target
< 100 Employees	Indonesia	We still open our office and keep our distribution going nationally with shorter office hour. Our field people keep working in the field to make sure the farmer receive the seeds when they needed.
< 100 Employees	New Zealand	The biggest challenge for SPS (NZ) Ltd. will be shipping on time, either with airfreight or ocean as services from NZ have been reduced.
< 100 Employees	Pakistan	Govt should facilitate to Agriculture sector and reduce the lock down specific sector
< 100 Employees	Philippines	Coordination with Government and Department of Agriculture Sector