Impact of CoVid-19 on Seed Trade

On-Line Seminar

Abigail Struxness

American Seed Trade Association
Agenda

1. Overview of seed trade and brief introduction about seed trade and relevant policy
2. Analysis of the impact of the epidemic on seed trade and movement
3. Suggestions for ensuring smooth global and regional seed trade
4. Post CoVid-19 scenario/prospect (seed trade and movement)
1. Seed trade overview and seed trade and relevant policy introduction in your country

- Overview of Import and Export requirements
  - Imports into the U.S. must follow guidelines in the APHIS Plants for Planting Manual
  - Exports from the U.S. follow requirements from the importing country
- Value of planting seed imported to the U.S. (2019): $1 billion USD
- Value of planting seed exported from the U.S. (2019): $1.7 billion USD
- Main trade partners exports (2019): Canada, Mexico, Netherlands, China, Austria, Japan, Italy, France, Ukraine, South Korea
- Imports (2019): Canada, Chile, Netherlands, China, Brazil, Denmark, France, Thailand, India, Argentina

Source: USDA Global Agricultural Trade System (USDA GATS)
1. Seed trade overview and seed trade and relevant policy introduction in your country

- Top 10 imported seed crops (2019)
  - Corn seed (Yellow)
  - Flower seed
  - Spinach seed
  - Vegetable seed (other)
  - Tomato seed
  - Rapeseed
  - Soybean seed
  - Pea seed
  - Corn seed (other)
  - Onion seed

- Top 10 exported crops (2019)
  - Corn seed (Yellow)
  - Corn seed (other)
  - Flower seed
  - Soybean seed
  - Tomato seed
  - Alfalfa seed
  - Ryegrass seed
  - Vegetable seed (other)
  - Kentucky Bluegrass seed
  - Onion seed

Source: USDA Global Agricultural Trade System (USDA GATS)
2. Analysis of the impact of the epidemic on seed trade and movement

COVID in U.S. (as of May 15, 2020)
- Total number of cases: 1.4 million +
- Total fatalities: 86,736 (includes confirmed and probable cases where available)
- State governments determine policies for quarantine and re-opening, with recommendations from U.S. Centers for Disease Control


Impact on seed industry:
- Seed industry considered essential critical infrastructure
- No significant impact on 2020 planting season
- USDA APHIS and Customs and Border Protection operations for imports and exports functioning well
2. Impact of Covid 19 on Seed Industry

What trend and changes happened for the seed industry after outbreak of Covid -19?

- Home garden seed sector –very popular
- Changes to demand for seed and agriculture products
- Virtual meetings and events
- New workplace safety requirements
3. Suggestions for ensuring smooth global and regional seed trade

- Open borders for seed movement is critical
- On-time phytosanitary certificate issuance and seed testing capabilities
- Navigating changing logistics and transportation environment
- Importance of information sharing
4. Post Covid-19 scenario (seed trade and seed movement)

- Ongoing research and development, counter-seasonal production
- U.S. government policies moving forward
- New ways of conducting business
- U.S. industry eager to continue trading with global partners
Thank You
Impact of CoVid-19 on Seed Trade
On-Line Seminar

Mario Schindler
Executive Director
Chilean Seed Association, ANPROS
Agenda

1. Overview of seed trade and brief introduction about seed trade and relevant policy
2. Analysis of the impact of the epidemic on seed trade and movement
3. Suggestions for ensuring smooth global and regional seed trade
4. Post CoVid-19 scenario/prospect (seed trade and movement)
1. Seed trade overview and seed trade and relevant policy introduction in your country

- **Import value:** US$ 67.3 Millions (2019)
- **Domestic Market:** US$ 140 Millions (2019)
- **Export value:** US$ 360.5 Millions (2019)

- APSA Region: 19% of Chilean Seed Exports, Mostly Vegetables Seed

**Top 10 imported crops** (2019)

**Top 10 exported crops** (2019)

**Main trade partners** (2019)

Corn is the main specie exported, but Exports of Vegetables as a Group is Bigger

APSA Region: 19% of Chilean Seed Exports, Mostly Vegetables Seed
1. Seed trade overview and seed trade and relevant policy introduction in your country

**Chilean Seed Exports by Continent (2019)**

- 40% in North America
- 34% in Europe
- 19% in Asia
- 7% in South America
- 0.3% in Africa
- 0.4% in Oceania
Analysis of the impact of the epidemic on seed trade and movement

Current: Containing and control measures

- Mandatory Quarantines and cordon sanitaires, applied in some areas of the country; Revision on a Weekly Basis; Strict Control and enforcement
- Full Confinement
- Curfew (restriction to circulation on public roads) 10 p.m. until 05:00 am, throughout the national territory.
- Mandatory use of Face Masks
- Prohibition of a Number of Public Events, Social, Trade and Services Activities
- Exemptions: Agriculture Sector
Analysis of the impact of the epidemic on seed trade and movement

Current Infected number, fatality number (brief) (Chilean Population: 18 MM)

• Total infected*: 69,102
• Total recovered*: 28,466
• Total deceased*: 718

*information as per May 24th
Analysis of the impact of the epidemic on seed trade and movement

- From March 22\textsuperscript{nd}, ANPROS maintains a direct 24/7 communication channel with the Ministry of Agriculture, as well as we have maintained permanent coordination with the different services linked to seed trade activities, such as Agricultural and Livestock Service (SAG), Customs Service, Ports and others.

- All these services are working normally under this situation, and have implemented a series of measures to adapt to the new conditions and facilitate the seed movement. (e.g. on-line availability of Phytosanitary Certificates)

- Agriculture, including seed production, have been declared as strategic and essential service to the country by the Chilean Government.

- Therefore, the movement of seed both for exports and domestic market has been flowing well and on-time.
Impact of Covid 19 on Seed Industry

What trend and changes happened for the seed industry after outbreak of Covid -19?

• In order to protect their workers and nearby circles, Seed Companies in Chile have implemented protocols with strict hygiene and health safety measures, to also keep their plants, processes and operations safe and in operation.

• Telework has been a challenge. All companies have implemented telework systems that have allowed them to continue with different meetings and commitments in a virtual way.

• ANPROS implemented telework on march 16\textsuperscript{th}

• For those activities that needs people to be present, agriculture was declared an essential service and can be exempted of some restrictions (local quarantines and national curfew)
3. Suggestions for ensuring smooth global and regional seed trade

- People's health is in the first place, and all preventive measures that have been adopted must be strongly held.

- Communication with the authorities has been crucial and must be maintained at a very high level, to allow the seed movement to keep flowing.

- Coordination between companies, national associations, ministries of agriculture and the customs service is crucial, and we must learn to work with this new mind setting.

- Teleworking is here to stay for a long time, remote communication platforms must be perfected and fluently managed.

- In relation to specific contingency plans, and in the particular case of Chile, as a Country where counter season and overseas seed productions are the main ones, the early supply of parental seed for next season will be critical. Logistic delays are expected throughout the year.
4. Post CoVid-19 scenario (seed trade and seed movement)

- Virus is very likely to stay active for a long time
- People's health is in the first place, hygiene and sanitation protocols must be implemented permanently
- Segregating operations is being recognized by Health Authorities as a Good practice, in order to not compromise the entire operation of any company.
- We must also highlight the positive reaction of our regulators, since a number of measures were implemented to streamline exports/imports and distribution channels in domestic market, such as online phytosanitary certificates, speeding customs procedures, authorization to movement of agricultural workers in restricted places, remote documentary inspections, to name just a few.
- We are working with our authorities in order to keep them permanently.
4. Post CoVid-19 scenario (seed trade and seed movement)

• Implementing efficient remote work in companies and associations. In an industry that meets a lot in person, it is necessary to implement extended remote meeting systems, both at a national and international level

• Chile, as a producer of counter-season and overseas seed production, foresees next season critical, since fluid availability of the best quality seed will be needed more than ever. This will demand very good coordination between companies, avoiding expected logistics delays

• Consumer Habits will change. Low incomes, unemployment rate and health issues, at world wide level, will impact on these habits, which will be critical for the future landscape of the seed industry
Thank You