**TOPIC / SPEAKER**  |  **SUMMARY**
---|---
Update from the USA  |  **Introduction & Overview**
Abigail Struxness, Senior Director, International Programs and Policy, American Seed Trade Association  |  ASTA was founded in 1883, and is thus one of the oldest trade associations in the US. Today it consists of more than 700 member companies in North America, involved in production, distribution, R&D and related activities. In 2019, seed imports to the US were valued at US$1 billion while exports $1.7bn. China is 4th top trading partner for both imports & exports; Japan and Korea are also important export markets, while Thailand and India are important import (supplier) markets. Imports into the U.S. must follow guidelines in the APHIS Plants for Planting Manual, while Exports from the U.S. follow the requirements from the importing country. Top imported crop seeds include Corn (Yellow), Flower, Spinach and other Vegetables, while top exports include Corn, flower, soybean, tomato and various types of field, forage and turf.

**Overview of COVID impact in USA (as of May 26)**
- Cases exceeded 1.6 million & approx. 90k assoc. deaths.
- State governments determine policies for quarantine and re-opening, in coordination with U.S. Centers for Disease Control, depending on situation, hence some states have different phases/degrees of lockdown.
- Unemployment rate was approx. 15% and Congress on March 27 passed a $ 2.2 trillion relief package, which includes a >$3 billion ag purchasing program to purchase produce and commodities for food distribution.

**Seed Industry impacts**
- From the beginning, the seed industry classified as “essential critical infrastructure”, allowing businesses to operate, transport of seeds during lockdown.
- Therefore, no significant impact on spring planting.
- Business as usual for USDA APHIS, and state agencies responsible for phytosanitary certificate issuance, as well as Customs and Border Protection agriculture inspections.
- Laboratories continue to seed testing without major delays.
- Visas still granted for laborers from Mexico and Central America to come to US in time for planting & harvesting.
- Some delays are. Transport and logistics in beginning, resulting in increased costs for such services.

**Seed Industry Trends**
- Demand for seed for home garden and small farmers has surged; many Americans growing first time, overwhelming...
Impacts of COVID-19 on Seed Trade: Online Seminar
Session Three: USA, Chile, France, Italy and Netherlands
27 May, 2020

increase in orders
- field crops such as corn and soya had just been planted, but waiting to see if there will be changes in consumer behavior after businesses start to reopen e.g. flower demand has decreased with less weddings and events
- Similarly, veg consumer behavior has changed, more consumers consuming produce at home from grocery stores compared to hospitals, hotels, large orgs. With bulk orders
- New workplace work safety dynamics: PPE, social distancing virtual events, meetings, staggered shifts, etc.

Suggestions
- Despite movement restrictions, cargo, including seed, continues to move and this is very important for “just in time” industry.
- Therefore, emphasize, ensure timely issuance of phytosanitary certificate and seed testing capabilities to ensure seamless cross-border trade without delay is critical,
- To this, electronic platforms like. ephyto ‘very useful, while harmonizing testing standards and procedures to reduce redundancy testing
- Less aircraft moving, and less ships coming from Asia to US, thus reduced capacity = increased costs. Thus suggest for companies to ‘navigate’ changes to adapt route
- Information sharing important, ASTA has website which lists relevant regulations and information. (click here)

Post Covid
- Ongoing prioritising of R&D, innovation and trade as industry adapts to new ways of doing business.
- US govt policies moving forward and Congress working on 2nd stimulus package for broader economic stimulus
- US industry intends to continue to trade and do business with Asia now and in post-Covid scenario

Mario Schindler,
Executive Director, Chilean Seed Association (ANPROS)

Introduction & Overview
The Chilean Seed Association (ANPROS) recently turned 50 years old. Chile is primarily a seed exporting country. As for values of its trade, Marios shared the following figures:

- Export value: US$ 360,5 Millions (2019)

Top import crop seeds include maize, ryegrass, carrot, onion, pumpkin, while top exports include maize, watermelon, carrot, canola
Impacts of COVID-19 on Seed Trade: Online Seminar
Session Three: USA, Chile, France, Italy and Netherlands
27 May, 2020

and pepper. Chile exports 50 species to 60 countries, with its top regions being the US (40%), Europe (34%) and APSA (Asia) accounting for 19% of Chilean seed exports, mostly vegetables, and top markets in region include Japan, Israel and India. Three years ago, this was less than 10%.

Overall Impact
To date (May 27), Population of country is 18 million, infections around 80,000, >30,000 recovered, 806 casualties. Lockdown started March 22, with mandatory quarantines in some areas of the country, including full confinement of people, curfew from 10pm to 5am throughout the national territory, mandated face masks in public places, as well as prohibition of public events, social, trade and various services. However, the agriculture sector was exempted as essential service.

Impact of Seed Trade
From March to May is an important period for seed harvesting, processing and exporting, so there were some concerns initially of setbacks. However, since the start of lockdown, ANPROS maintained a "direct 24/7 communication channel" with the Ministry of Agriculture, including "permanent coordination with the different services linked to seed trade activities, such as Agricultural and Livestock Service (SAG), Customs Service, Ports and others." Thus all services were able to continue normally, though adapted with measures and conditions to facilitate seed movement, including utilizing online platforms for electronic documentation, e.g., Phytosanitary Certificates. And due to the strategic importance of seed recognized by the Chilean government, “the movement of seed both for exports and domestic market has been flowing well and on-time”

Trends
The people of seed companies and their life and work situations have been impacted. With an emphasis on hygiene and health safety measures, companies have adopted telework systems for many of their staff, which has been a challenge. ANPROS staff have teleworking since March 16, and after two months, not sure when would end; nonetheless, those working in seed production and processing during this critical time of harvest and packing, who could not telework were exempted from some restrictions such as local quarantine and national curfew.

Suggestions
Health comes first, so all preventative measures should be maintained in the long term. Communication with authorities has been key to our
success and thus needs to be maintained to keep seed flowing. Likewise, maintaining strong coordination between companies, NSAs, Departments and Ministries of Agriculture as well as Customs services is important. We really must learn to work with this new mindset, or “New Normality”. Teleworking is here to stay, therefore remote communication platforms must be perfected and fluently managed. Solidifying contingency plans will be important. In the case of Chile, as a country where counter season and overseas seed productions are importants, we need to secure in advance supply of parental seed for the next season as logistical delays are expected throughout the year.

Post Covid Scenario

As the virus may be with us for a long time, health is priority, and therefore hygiene and sanitation protocols should be implemented permanently. Segregating operations has been recognized as good practice so as “to not compromise the entire operation of any company.” We want to acknowledge the positive cooperation of our regulators, in streamlining export and import procedures and removing roadblocks in domestic distribution channels, whether in respect to phyto certificates, fast tracking customs procedures, authorizing agriculture workers in restricted places or facilitating remote document inspection. We’re working with our authorities to keep such measures permanently.

As the seed industry is accustomed to frequent and regular meetings, we are all looking forward to [this physical meeting aspect] to come back, but most likely it won’t for quite some time. Therefore, regarding companies and associations, it is necessary to implement extended remote meeting systems, at the national and international levels.

Chile as a producer of counter season and overseas seed production foresees next season being critical, and the “best quality seed will be needed more than ever.” This will require good coordination between companies and regulators to avoid delays.

Finally, consumer habits will change due to reduced incomes, rising unemployment rate and health issues worldwide. Anticipating and understanding these changing habits which will be critical for the future landscape of the seed industry.

Panel discussion

1. Chile: Jean-Pierre Posa, CEO, Southern Seed Productions
Question 1: What are impacts and short term solutions, especially re. R&D, logistics and intl seed movements

Jean-Pierre (43:49)
- As a seed exporting country, most of our seed companies are contract seed growers who use our customers’ breeding material and don’t have our own.
- When March lockdown started, we were all caught by surprise, re. required permits for movements/curfew, there was initially confusion about procedures, but within 2-3 days it became more organized and we could get the permits.
- When pandemic started, first Asia, then Europe and finally the Americas, so our impact started later than others.
- Most of our crops are harvested between Feb and April, so pandemic came right in the middle of this. More than half of the harvest was already complete by then, and we were able to complete.
- Our processing plants were operating at full capacity and we had to address how best to implement necessary measures at workplace and field sites. Most challenging was transporting of people with social distancing, so had to increase number of vans, buses and overall transport costs. At the field, had to advise, mandate growers on requirements for sanitation, social distancing, hygiene, etc.
- Logistics and shipping posed another issue: getting seeds from plants to part required inspections, and getting inspectors to location was challenging, so we had to devise system. Then came issues with cargo, as there was no passenger freight, and we had to find alternatives, such as sea cargo and freight planes, which were more expensive.
- Most importantly, cannot sacrifice health of farmers and workers, so must maintain workers’ health and hygiene as top priority, which requires managing rising, unforeseeable costs. In sum, happy to still be operating and exporting. There have not been too many issues for exporting seeds, and our companies are still managing.

Elvire (50:40)
- General impact has been very heavy; however food & Ag sectors being considered priority sector have had a low impact
and seed operations have continued to work ‘almost as usual’.
- For office employees, home office is the ‘new normal’
- Springtime is important for French farmers, especially for
  maize, flowers, sugarbeet and rapeseed, and the delivery of all
  required seeds was completed in time for planting, Thus
  planting, and home gardening, did not suffer
- For seed exports, there were some delays with the issuing of
  phytosanitary certificates (e.g. ISTA orange certificates). This
  was due to limited HR as staff at home and labs also had to
  reduce the number of staff working at same time, and it was
  challenging to get certain documents. However, thanks to
  NPPOs accepting digital certificates, it made seed movement
  more fluid.
- French seed trade with the Asia-Pacific region is estimated to
  be worth about 40 million Euros, about 3% of French exports,
  and 6% of its imports. A majority (about 70%) of its seed
  exports are to European countries.
- Mid March, two weeks after lockdown, GNIS conducted a
  survey with its seed exporting companies and for a large
  majority of them, export activities had not badly affected,
  though some issues with transport.
- Aside from slowdown of official seed certifications, the next
  biggest problem private companies had to deal with in the
  beginning of Crisis until end of March were delays in deliveries
  due to limited transport, flights, ad lack of shipping containers
  = huge increase in expenses, double and even triple the usual
  in some cases, especially affecting small volume orders,
  important for small market countries and commercial
  prospecting.
- Moreover, March is an important month for import of
  counter-season seed, so this segment faced challenges with
  transportation and logistic expenses.

Davide(56:18)
- Strong measures were implemented in italy but agriculture
  including seeds was recognized as essential to guarantee food
  supply and animal care. therefore all seed companies
  continued to work but with reduce of workers ratio and health
  measures; sanitation and logistics continued, reorganizing of
  workplace, added shifts to reduce presence of staff, field
  heads continued to visit fields to advise farmers on producing
  best quality seed, security protocol adopted
- But borders closes, preventing customers to visit production
  field as the usually do in spring time; so to keep customers
  informed, increased crop report for customers, including
  videos, with drones in addition we organized conference calls
  live from the field to show production conditions.
- Transport and logistics systems never stopped, but slowed down. For sea routes to Asia increase in costs, minimum of 10 to 20%, and much more for air freight shipments.
- Anseme is seed production company involved in a high value production and thus works with breeder companies all around the world, many based in Asia. We have two key periods. First is from December to February for spring crop, June to August for summer and Autumn sowing.
- The lockdown came at end of spring cycle, so fortunately did not impact sowing. It is difficult to estimate how autumn cycle will be impacted. Take it day by day, continue to work on counter-season, marketing and exporting, contract period is just starting now and so there is positive outlook for 2020, but concerned for coming seasons because many of our breeding companies are moving slowly and uncertain about the future, so 2021 to 2022 won’t be easy.

Jack (1:04:00)
- In the Netherlands, the government had different philosophy, which was an “intelligent lockdown”: people not prohibited to go out, but requested to comply with 1.5 meters distance; if feeling any symptoms of being ill, asked to stay home and two weeks of isolation. So lockdown was much severe than other countries.
- When lockdown started, the big challenge was logistics: trucks held up at at borders, and many delays for shipping one country to another in union; airfreight became scarce, companies had to adjust with measures to ensure shipping. Considering Netherlands is major seed exporter, companies depend on getting exports out to the rest of the world.
- Within Europe problems were partially solved by setting up ‘green lanes’ so priority product shippers had less delays crossing borders
- To reduce office staff, companies respected govt requirements for work at home measures; employees of seed companies, recognized as a priority industry, were allowed to go to work, following guidelines (1.5 meters distancing, site isolation, etc.) In addition, the government offered benefits for priority workers, for example, childcare as schools were closed. Such measures/support enabled seed business to “continue operating … in normal fashion,” albeit with some delays.
- Seed companies in the Netherlands strongly represented by PLANTUM (the Dutch Seed Association), who have coordinated, have strong communications with govt authorities to ensure seed supply and export issues addressed. This setup has helped a lot for companies to know what they can do as an industry, providing information, measures and best
practices for employees and service providers they work for, making it easy for companies to ensure.

- So far, the impact on business has been limited, aside from some delays. In some cases, some customers are increasing orders from usual to ensure provisions are sufficient for the future. Waiting to see what the longer term effect will be on growers. Especially for Netherlands as a seed exporting country, with reduced output/exports (of breeding material abroad) this could impact next year.

John (1:12:54)
- As a company offering seed testing services, we receive samples from all over the world: samples from abroad pass through inspections USDA APHIS, if from Europe and South America, go through New York, and if from Asia, via San Francisco. Fortunately we have not had major delays as USDA has continued services, if inspections did halt it would be problematic. There was one slight delays, eg. one to two days, but for most part samples have been coming and also no big impact on domestic shipping, through US Postal Service and courier services such as UPS.

- One employee in Colorado did get diagnosed, but he was quarantined for two weeks, and tested negative, since returned to work. Same measures as others: introduced split shifts so reduce the number of people in office, some staff ended up working less hours, e.g. 6.5 hours vs usual 8 hours. This affected turnaround a little bit, but not much as staff worked hard to avoid delays. Also, installed new sanitation stations and allowed some staff to work from home where possible.

- One thing concerning for me for the future: in some cases restrictions of air travel and field visits, so clients can’t get inspectors get to production fields to inspect crops, so this will put bigger reliance of seed testing, and seed quality checks. Hopefully this will ease in few months so summer crops in North Hemisphere get inspected well.

- Also, not having major meetings (ISF, ISTA, APSA), which will affect client relations. Meanwhile virtual meetings like this will help. Kudos to ASTA, who has weekly conference call for members to keep updated, informed on updates.

Q2: Suggestions and solutions for the Post-Covid Reality?
Jean Pierre (1:21:17)
- To clarify, it’s not that we don’t have problems in Chile, but that we have been able to circumnavigate problems through good communications with our government. Must keep in mind that 45% of entire population has been under full lockdown, which has posed many challenges affecting the seed industry, which we were able to address.
| - The government has finally started utilizing the ePhyto platform with some countries. We would like to see more paperwork processed online. We are pushing govt to adopt electronic platforms, including invoicing, now completely electronic in Chile, and want to extend to cover all paperwork needed for imports and exports. |
| - A key communication point we’ve pushed with agriculture authorities is that “Seed is perishable, seed is alive,” therefore it needs priority over goods that are non perishable. They have accepted this concept, which is good. How did we get there? It took some time, and started a long time ago by seed associations’ conversations with the head of customs, plant quarantine, and Ministry of Agriculture. This is why we’ve had less problems than other areas. |
| - Re. Seed associations, NSAs, RSAs and ISF, we need to rely on them for common problems, how to move seeds, get documentation, etc. not referring to competitive side, but the common issues that benefit the free movement of seeds. We are united ... with APSA, with our own NSAs, and getting stronger. It’s not something you start when you have a problem, but way before. If you didn’t start yet, start now, take advantage of it to really benefit from associative activity. |
| - For the industry, many things will be different in the future. Accept that some telework is possible, but not all aspects. As industry we need to think ahead of time: For contracting seed producers, we are requesting customers ship seed in advance, not wait to last minute. Things are not as fast as before, need to think what will happen next, though it will be difficult. Most importantly, we need to unite behind our seed associations and regional seed associations, as they are the ones who will go to government to ensure easier and freer movements. |

Elvire (1:30:30)

- Agree with what has been said. Cooperation within the industry, and communication with the government are key solutions. As mentioned, the flow of seeds from France remains stable thanks to organization and flexibility of relevant authorities, the implementation of tools to facilitate export process and materialization of documents despite limitations of government staff. We need to remind authorities that since France is a global leading exporter and importer of seeds, it’s important for us to ensure seed flows continue as quality seed is the basis of food security. Thus it’s important to lift restrictions of seed trade, focusing on import duties and import conditions, as well as Intellectual Property Rights, with an aim of encouraging both exportation and investment. |
| - One more suggestion is to maintain, indefinitely, measures |
Impacts of COVID-19 on Seed Trade: Online Seminar
Session Three: USA, Chile, France, Italy and Netherlands
27 May, 2020

<table>
<thead>
<tr>
<th>Davide (1:34:36)</th>
</tr>
</thead>
</table>
| - Agreed with all suggestions. In Italy we were fortunate, and have a strong seed association who has maintained contact with the government and Ministry of Agriculture to enable our work to continue. Regarding business, and to increasing difficulties from COVID, we must change our mindset to be more proactive, to plan for our production cycles, on our side for production and with our customers for the breeding material. Everything must be calculated to ensure our cycles are ahead of schedule. Two months ago, we had received the stock seeds only a few days before sowing, now that would be impossible, so now we’ll have to start the process a month in advance, Likewise for delivery of seeds to our customers in Asia. Before, a month was the norm, now we have to anticipate two months or more for delays.
| - Regarding unstable climatic situation and changing weather. To produce quality seed is becoming more difficult by the day, and COVID-19 has made it even more difficult. For this, now it is even more important to consider working with the company with professionality, expertise and experience and in the country with the most suitable weather. |

<table>
<thead>
<tr>
<th>Jack (1:38:42)</th>
</tr>
</thead>
<tbody>
<tr>
<td>- There are several questions being asked and discussed in the Netherlands regarding the challenges with maintaining strict measures for returning to work: How we can live and work with 1.5 meter distancing rule? Can we still have two people in the same office? Do we have to separate working spaces with plexiglass? In the Netherlands, it is, common for employees to come to the canteen during break. You can’t do that anymore, so how do we address this as a company, as a country -- it’s a timely discussion, especially for seed companies. How will we adapt to ensure social interactions, and happiness at work? These questions are being discussed now by seed companies. PLANTUM has created an opportunity for members to interact in virtual meeting that all members can join and exchange ideas on how to start working in this ‘different reality’. It is clear to us that it will take 1 or many years to adapt to the 1.5 meter environment. Travel is another issue, as our business is very...</td>
</tr>
</tbody>
</table>
intensive for business travel. Measures are starting to get less strict in Europe, but regarding other areas, for travel to the US, for example, one needs two weeks’ quarantine before they leave and again when they return, that’s a whole month of being inactive, or partially: a big effect on what companies can do and how to organize for the uncertain future.

- PLANTUM is a vector of the solidarity between seed companies, including seed potato, young plant producers and flower and ornamental sector. This latter sector has been significantly impacted, due to the need to destroy a massive amount of flowers … The government has offered critical assistance to such companies, including by covering up to 70% of salaries until they can start to ‘carry own rake in future’ this is the only way to ensure the businesses can survey and that their employees can continue to work. Fortunately it is not the case for vegetable seed companies.

- Another area PLANTUM is helping a lot with is in providing information for business opportunities. Every morning through PLANTUM’s online portal, there are updates from agriculture attache abroad, providing reports from each country re. import and export, and business opportunities.

- These are practical and down to earth solutions. It’s amusing as before Dutch people had complained that the government is not spending enough, but now there is a lot of spending, so we’ll have to see how we can pay for all of it in the future.

John (1:47:48)

- Here in the US, we are hearing a lot about the “new normal”. I certainly hope this is not a permanent normal, human beings are a social animal and to have restrictions we have now is having huge impact on not only economies, but on people on psychological level. We hear about increases in suicides, and spousal abuse, etc. but eventually have to get out of this ‘new normal’ and get back to some sense of the ‘old normal’ albeit with some changes. This might include increased hygiene, masks, sanitations, but we can’t keep people separated. Likewise on restrictions for travel. I’m a social person, teleconferencing is nice but not the same as shaking hands, meeting them face to face at a conference, so really hope the ‘new normal’ doesn’t last too long.

- I would also like to second what others said about associations. Eurofin Diagnostics is just one company with 120 employees, and can not have influence on the USDA by ourself. But as a member of ASTA, with more than 700 members and thousands of individual members, we have a strong voice. So for seed companies it is very important to continue strong support of national and regional seed
### Impacts of COVID-19 on Seed Trade: Online Seminar
#### Session Three: USA, Chile, France, Italy and Netherlands
#### 27 May, 2020

#### Panel Discussion Conclusion

By Dr. Kanokwan Chodchoey, APSA Executive Director

**We heard in seminar the challenges in all countries are similar -- extending to travel restrictions, disruptions in international seed seed movements as well as interruptions for R&D activities affecting new product development as well as challenges at the office with new distancing requirements. In a post-Covid19 world, panelists suggested that we need to work together with our seed associations. APSA can serve as an umbrella, as a regional seed association providing platforms for better cooperation with national seed associations and their respective governments. Moreover, APSA would continue to build its relationships, cooperation and collaboration with global stakeholders, National and Regional Seed Associations. Food Security will continue to be priority for APSA which will continue to work with partners and stakeholders to pursue many of the solutions echoed in the webinar, including fast-track and streamlining mechanisms, in the form of ‘green channels, electronic clearance platforms, third-party laboratory accreditation and the Systems Approach. Thank you everyone.**

#### Closing Remarks

By Mrs. Tian Weihong, Secretary-General of CNSTA

**Over the past two days, speakers and panelists shared a lot of information and updates from their countries. We learned a lot from them about how to respond to the impacts of COVID-19, and how to ensure food security and seed movements. Seed is the starting point of food systems, and seeds are also globally traded agriculture products. From our speakers we learned that the trade of seeds amounts to hundreds of millions, and even billions of dollars. That is to say that we depend on each other. We need each other. So communication and cooperation are more important than ever before, especially during such unprecedented and difficult times. This is why we are here today and yesterday and why CNSTA is working with APSA to offer this online seminar, as a platform to share experiences and come up with the best solutions to ensure food security and seed movement. The seminar has been very successful, with more than 50,000 people within China joining. This is the first time we’ve worked with APSA to hold such an online seminar which is open to everyone to increase awareness of food security and seed movement. I would like to thank APSA’s Dr. Kanokwan … and Agriculture Wealth of South Rural Newspaper for their technical support, and APSA President Tahir Saleemi, and CNSTA President Song Wei Bo … and all colleagues for hard work and preparation, and last but not least, all the participants, audience, friends, and translators. Thank all of**
you for joining us. I wish all of you good health and safety.