

Market Segment:	Updated COVID-19 Summary:
Canada	4/9: Ontario is only allowing essential businesses to be open. The retail list includes: grocery stores, liquor stores, pharmacies, convenience stores, mass merchandisers, pet food stores, gas stations, and hardware stores. In foodservice, restaurants can only offer take out. Stores have reduced hours to daytime only and are limited to allowing 50 people in at a time. Stores are having difficulty keeping certain products on the shelves: toilet paper, pasta, canned goods, and flour. Major retailers are allowing seniors only shopping for the first hour of store openings. Smaller outlets such as pet food stores will only allow a couple of people into the store entrance and will pick up the products for you to eliminate you walking into the store.
Caribbean	4/15: In the Dominican Republic, a large part of the population does not have access to a lot of resources, but the Government has come up with a decent plan to take care of people during April and May. Confirmed coronavirus cases are around 3,000 people and over 100 deaths.
China	Feb: COVID-19 has kept consumers and workers at home. This has delayed purchases in stores and at restaurants, it has also slowed the unloading of products at ports. In addition to the COVID-19 outbreak, there is also an outbreak of African swine flu - this affects only pigs and has pushed Chinese pork prices to a record high. As a result of this dual disease outbreak, the problems facing import-dependent China in its efforts to feed its population is highlighted. March: Due to a triple threat of COVID, ASF and Avian flu, consumers are looking at plant-based foods as an option for protein rich food products. Coronavirus is also a good opportunity for meat exporters to enter China as the demand for imported meats rises. According to a lobster company, retail and e-commerce sales are up but not enough to offset the loss in the foodservice industry.
Costa Rica, Nicaragua, Panama	4/7: It is estimated that the Seafood Preparation and Packaging sector is among the activities that would suffer the greatest impact in the coming months. Another sector that is in the group of those that will be impacted, but in lesser magnitude, is the production of soft drinks and other non-alcoholic beverages. According to projections from the interactive information system, Food and Beverage sales will be among the least impacted in this context.
France/ Spain Seafood	4/1: The food chain in France is being redesigned as an emergency. As all commercial catering markets are now closed, large retailers are the center of the crisis in France. The adaptation of products and sectors rather dedicated to catering to that of mass distribution becomes an imperative. 4/1: Seafood is not doing well as boats are no longer allowed at sea. Even if safety is provided for fisherman, there are still missing outlets as estuaries are closed and fish is not sold in supermarkets. However, trade seems to be progressing between fishing, seafood marketing and distribution. 4/1: All labor and industrial services that are not absolutely essential have been restricted. Therefore, the agricultural and fishing industry has been saved as well as the distribution of food. At this time, the Spanish population is guaranteed the supply of fishery products. In regard to the freezer fleet, problems include: crew replacement, air communication restrictions, and fishing license renewal. In regard to the inshore fleet, problems include: operations are exacerbated to the Mediterranean, local markets are beginning to collapse. In regard to sales, there has been historical growth rates in retail and online channels
Germany/ EU	Feb: COVID-19 showed its first impact on the food market. The global concern for the virus has impacted consumer buying patterns as well as distribution channels in Europe. Retailers and traders reported a massive increase in sales of "basic" products with a long shelf-life especially canned and dried food. Due to the virus and people avoiding going out in public, e-commerce services and online retailers are reporting first challenges due to limited supply and logistical challenges. 4/7: Retailers are still reporting strong numbers, and some are now regulating the purchase of products such as toilet paper or pasta. the HRI sector is very much struggling. Two major companies (Vapiano and Maredo) have declared bankruptcy. Some restaurants have started offering delivery options or have transitioned to selling basic groceries to keep business going. While food supply is stable, farmers are worried with travel restrictions that seasonal workers won't be able to work in the upcoming harvest. The EU has announced a financial support package close to US\$2.5 trillion to help with the economy. 4/9: While the general situation has not changed and the public lide in Germany remains at a standstill, the government started to adjust the labor laws. To better respond to the crisis, guidelines such as maximum working hours or mandatory rest hours per day will be changed for professions with a crucial value for public safety. These changes should remain in effect until June and include jobs in public health service, police, transportation, as well as logistics and food distribution. Shopping behavior has slowly come back to normal with consumers now buying groceries only for their daily or weekly usage instead of hoarding products for the crisis. Sales of foods are up as people are forced to cook at home more often due to restaurant closings. EU governments agreed on an exception of the travel ban for 40,000 seasonal workers. This will help to ensure regular harvest for seasonal fruits and vegetables.
Hong Kong	Feb: All travelers from the mainland were placed on a mandatory 14-day quarantine as part of an escalated response to the COVID-19 virus. Representatives of fruits, vegetables, rice, pork, eggs, seafood, and poultry merchants urged the government to exempt cross-border truck drivers from the mandatory quarantine requirements to ensure the city's food supply was not broken. The food and beverage industry in Hong Kong posts first annual decline in revenue since Sars, with 5.9 percent drop. 4/10: Restaurants are open, but have to keep 4 to a table and 1.5 meters apart from each other and can only operate at 50% capacity until 4/23. Bars and pubs are closed until that date. Food delivery is up and have doubled orders compared to Q4 2019.
Indonesia	4/9: Indonesia's economy has been negatively impacted by the epidemic, and the government has estimated economic growth at 4.7 percent for 2020. On March 13, 2020, the Indonesian government issued its second emergency stimulus package worth US\$8 billion as it seeks to protect the economy from the impact of the coronavirus (COVID-19) outbreak. This follows a US\$725 million stimulus package announced in February 2020, which provided fiscal incentives to support the country's tourism, aviation, and property industries. The package also allocated US\$324 million for low-income households. The animal feed industry in Indonesia has impacted of Covid-19 outbreak in China from early February as many micro ingredients needed come from China. It is impacting the availability and price of feed micro ingredients.
Japan	4/7: The Japanese government continues to urge strict social distancing to combat the coronavirus, including cancellation of all sport and cultural events, and gatherings involving large groups of people. Schools were officially closed from early March and most businesses are encouraging telework. Many people are wearing masks whenever they go out. Disruptions to trade have been limited to date, primarily to delay in cargo shipments of 1-2 weeks. However, the worsening global situation for the coronavirus will likely worsen the supply chain situation. Travel, tourism, hotel, and related businesses have been seriously disrupted. Foodservice operators, department stores, and tourist venues are experiencing severe declines in traffic as people avoid shopping areas and crowded food courts. On the other hand, retail food purchase for home consumption has increased as people decide to eat at home more often to minimize virus transmission risks.
Middle East	3/25: There is no lockdown in place at this time for the Middle East however, authorities are encouraging people to refrain from going out except for essential needs. Action was taken early in order to prevent the spread of the virus. Airports in this region are currently closed, there is no regional trade servicing travel to neighboring GCC countries. Local visiting for trade servicing is now replaced with video conferencing, in order to avoid close contact.

Oceania	<p>4/14: All non essential business closed including bars, restaurants and cafés having a immediate impact to the food service industry. International and domestic travel has been limited. Essential services including supermarkets remain open and retail sales spiked with panic buying and have plateaued since. Panic buying has been a major issue, consumer perception of shortages has fueled hoarding of essential items including toilet paper, pasta and rice. Farming and retail authorities have reassured that Australia is in no danger of running out of food. Australia produces three times as much as it consumes with two-thirds exported. By mid-February one in six Australian businesses (15%) had already been impacted by CV-19. This new threat comes after over a quarter of businesses (28%) stating they have been affected by the bushfires in the months prior according to a Roy Morgan survey of 1,170 businesses. 4/14: Fishers along the Victorian coast have been left holding up to 10,000 lobsters in seawater storage tanks on boats and in processing facilities after China shut down its live animal trade over coronavirus fears. Australia's seafood industry has been thrown into crisis by the ban, with local fishermen considering a plan to return thousands of lobsters to the open waters. Prices have already dropped by up to 20 per cent from \$130 to \$140 a kilogram in Victoria to \$110 as fishers and wholesalers begin trying to offload the premium product in local retail markets. The last air cargo shipment of fresh seafood was accepted into China on January 26, shortly before demand collapsed after internal transport restrictions and public health fears saw the mass cancellation of Chinese New Year celebrations.</p>
Singapore, Philippines, Thailand, Malaysia	<p>4/9: Singapore is trying to curb the spread of covid-19 an effective April, 7th, except for key economic sectors and essential services, all work premises will close for a month until further notice. All schools will also be closed and although food establishments will remain open they are for take-aways only 4/15: most of SE Asia is in lockdown mode until the end of April. Malaysia as extended its lockdown twice and Singapore just imposed tighter movement control.</p>
South America	<p>Colombians' consumption habits have been changing due to the rapid spread of the coronavirus and measures such as preventive isolation to mitigate its impact. According to LookApp, most consumers now prefer to shop at low-cost stores (68.5%) and neighborhood stores (53.3%). Also, the shortage of some products has created an opportunity for less renowned brands. According to a survey conducted by Nielsen in early March, the purchase of canned products increased by 19%, dairy products by 12%, and frozen foods by 3%. Besides, people's spending in supermarkets, drugstores, and department stores shot up 99%, 41%, and 41%, respectively. Finally, e-commerce registered a growth of 105% in the first three weeks of March, as reported by Credibanco. In Brazil, according to APAS (Supermarkets Association of Sao Paulo) the supermarket sector registered a sales growth of 11.4% on March 25th. According to ABComm (Brazilian E-commerce Association), online stores recorded an increase of more than 180% in sales volume.</p>
South Korea	<p>4/8: The tourism and hospitality industry has been seeing a significant decline since the start of a social distancing campaign as an act to halt the coronavirus. There has been 130 cancellations and or postponements of food related exhibitions - it is said that some will be replaced with AR technologies. Food purchases have increased during COVID-19: grocery food purchases increased 23.6% during January and February, while non-food purchases declined 4.9%. The purchase spending amount for groceries increased by 23.5% while the purchase frequency declined 1.2% as consumers tried to reduce shopping and stock up on non-perishable foods. Due to this, online grocery shopping has increased the most at 75.7% while hypermarkets and supermarkets are growing 22.5% and 13%. The top 5 products that are most popular online include: health related products including masks, snacks, delivery food, consumer goods, and frozen foods. Supply chains are affected globally and it may take months to completely recover.</p>
Taiwan	<p>Feb: Consumer visits in most retail markets have dropped by 50% and there have been inspections of body temperature upon entering the premises. The government has discouraged people from exposing themselves to any public area, and have been suggested to wear a mask where necessary. Most supermarkets have suspended any in-store sampling, only a few allow oral demos at this point. Most food services were seriously affected and forced to run a special sale - all tourism related businesses were also slumped.</p>
UK/ Republic of Ireland	<p>4/9: In the UK, the government has ordered a total lockdown. Citizens have been instructed that they must stay in their homes except for shopping for necessary food supplies, a visit to a doctor or to obtain medicine, and one daily outing for exercise comprising either a walk, a run, or a bicycle ride. Supermarkets are now trying to police queues to ensure safe distances are adhered to, both outside and inside stores, using floor signage. Certain food items are in short supply (primarily thought to be due to panic buying) and these are canned goods, milk, butter, eggs, fruit, vegetables, and household goods. All major supermarkets offer home delivery but the businesses are being swamped. Sites crash and now the supermarkets are limiting the slots available, releasing new slots as and when.</p>
Vietnam, Cambodia	<p>3/25: The Vietnam government has put a stop to all foreigners arriving from affected areas, such as Europe and North America. Those who have permission to enter must go into a 14-day quarantine, including those from Southeast Asia returning to Vietnam. In addition, all facilities that hold more than 30 people are closed until the end of the month. As all restaurants are closed, supermarket sales are increasing. 4/10: The new cases in Vietnam are mainly from those who have returned from traveling from Europe and North America. All those returning must quarantine for 14 days. All gyms, hair salons and restaurants need to be closed until 4/15. Restaurants that serve take-away and online business are still able to be open but due to the number of folks eating at home, the sales in supermarkets have increased.</p>