Building Resilience in Flower Supply chains

Promoting Fairer Trade Purchasing, Awareness and Demand

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Executive Summary

This report is an output from the Resilience in Flower Supply Chains Partnership Project funded through the UK Foreign and Commonwealth Development Office's (FCDO) Vulnerable Supply Chains Facility (VSCF) during the COVID-19 pandemic in 2020-21. The report focuses upon the project's third Work Package: Promoting fairer trade purchasing, awareness and demand. The research undertaken through the Research Centre for Business in Society at Coventry University, involved secondary data collection in the form of a review of market research, trade and press publications at different stages of the pandemic and primary data collection undertaken via retailer roundtable discussions, focus groups and key informant interviews.

The research revealed that *the cut-flower industry was initially hit very hard* by the pandemic and associated lockdowns. Indeed, many parts of the industry came to a standstill as planes were grounded, or filled with PPE, flowers were categorised by governments as non-essential goods and staffing problems affected businesses. Millions of stems of flowers were **destroyed**. However, *demand bounced back strongly as consumers sought to find ways of showing attachment in a socially distant world*. Online flower sales grew tremendously as the market shifted and consumers were willing to pay higher prices.

Workers in Kenya have been hit hard by the pandemic, with job losses and effective pay-cuts affecting many. *Women in particular have borne the brunt of these impacts*. The **precarity** of worker livelihoods has been laid bare during this time, as worker communities have little cushioning to support them during periods of crisis. Various groups of stakeholders stepped up to provide emergency relief which helped to stave off the worst impacts for many but not all farms were able to benefit from such support. The project has placed worker wages into sharp focus, with analysis revealing the *disparity between typical farm worker wages and a Living Wage*.

It is clear that **communication** across, between and within different organisations has been crucial for helping to re-configure supply chains during the crisis and to ensure that they have been able to keep operating. *Increased information exchange* between buying teams and ethical teams within retailers has been an important positive outcome offering hope for greater integration of ethical and sustainability issues within retailer operations going forward. Whilst problems in undertaking on-site ethical audits has been a major concern, the use of adaptations such as Worker Voice technologies has offered promise for improving the robustness of certification processes.

It is clear that supply chains will *increasingly be prone to crises* as multi-dimensional climate change impacts unfold. Improving the **resilience** of supply chain practices is therefore essential. The COVID-19 crisis is demonstrating the *importance of multi-stakeholder communication and co-operation, transparency and the imperative to address worker livelihood precarity*. The setting up of a British equivalent of the Dutch Covenant for Responsible Business Conduct in Floriculture would be an important step for providing a forum to drive through such changes.

Introduction

The Resilience in Flower Supply Chains Partnership Project was a collaboration between the Fairtrade Foundation and MM Flowers to support workers during the COVID-19 crisis to meet their immediate needs whilst also promoting a more sustainable flower sector to bolster long-term resilience. The project partnered with Tesco PLC, Marks & Spencer, the Co-operative Group, the Food Network for Ethical Trade (FNET), Women Working Worldwide and Coventry University[2]. This report details research undertaken by the Coventry University research team to deliver specific objectives and work packages within the overall project. Other outputs have been produced by other project partners, including a summative report which outlines the key recommendations from the project as a whole (see: Taylor et al, 2021).

The floriculture sector was hit very hard at the start of the pandemic with severe disruption at various parts of supply chains. The upshot was that flowers went unsold and had to be destroyed in supplier countries resulting in negative impacts upon farms, their workers and surrounding communities. There has been a remarkable recovery in the industry's fortunes albeit with uneven outcomes for different players in the supply chain. This component of the wider project focuses upon capturing the dynamics of change in the industry during the pandemic, seeking to understand why some supply chains have proven more resilient than others and asking what lessons can be learned in relation to social, legal and financial relationships within the supply chain.

There have been some interesting phenomena occurring at different points in the pandemic's trajectory – prices went up, yet demand in the UK increased substantially after the initial shocks of the first lockdown and there was greater demand for higher priced products. What does this tell us about price elasticities? And to what extent have those at the production end of the supply chain benefitted? This in turn leads us to the question of the 'consumer' and their choices. How have consumers responded? Are there discernible changes in consumer behaviours? Are ethical considerations becoming more important or different to pre-pandemic times? How have commercial stakeholders responded to the challenges during the pandemic? What role have ethical teams been playing within retailers and suppliers during this time?
Are there discernible shifts in corporate attitudes to the ethical dimensions? And ultimately, just how resilient are flower supply chains? And what can be done to ensure their resilience in the future? These and other questions are tackled within this research. Through the work streams outlined in the next section, drawing upon work undertaken within the other parts of the project, we identify coherent mechanisms for addressing fragilities in cut-flower supply chains with a view to increasing the sector's broad-based sustainability.

The report is structured as follows: the work undertaken by the Coventry University research team is situated within the context of the broader project, therefore we begin by explaining the wider project objectives and provide details of the work package which we delivered. Then the methodology undertaken to deliver the work package is outlined. This is followed by a review of the market research literature which provides insights into retail trends and consumer behaviours during the pandemic. This section is split into two sub-sections, the first deals with the first phase of the pandemic up until June 2020, whilst the second sub-section analyses the trade literature, press and market research literature until the summer of 2021. The subsequent section provides detailed analysis of the roundtables and interviews, this is followed by a brief discussion of the key overarching themes which emerge from this analysis. We conclude by identifying a set of recommendations for different stakeholders which emerge from our findings.

[2] This project was funded by the Vulnerable Supply Chains Facility (VSCF), a rapid COVID-19 response fund set up by the UK FCDO, and managed by Mott MacDonald Ltd. The Facility has partnered with 16 UK retailers supporting over 100 suppliers across Bangladesh, Ethiopia, Ghana, Kenya, Myanmar, Tanzania, and Zimbabwe, and will provide economic, social, and health benefits to around 1 million women and men direct and indirectly.

Project Objectives

It is important to see the work presented here from Coventry University as part of the overall objectives and outcomes for the project as identified at the start. There were three specific project objectives, delivering targeted outcomes via three work packages:

Objective 1. To address the immediate impacts of the COVID-19 crisis social needs

Objective 2. To address the sustainability of the system

Objective 3. To improve purchasing practices and increase consumer awareness

Although our work contributed to the whole project and all objectives, our main focus was on the third objective. It was recognised that the current crisis could be an opportunity to raise awareness of purchasing practices at both retailer and consumer level on the impact of their actions on the viability of the farms, and the lived experiences and livelihoods of the workers, and also the potential benefits of supporting fairly traded goods through value chains that benefit all involved in them. This would help consumers make informed choices on their flower purchases and show how that pressure will drive the increased demand for fairly traded flowers and increase the ethical and environmental sustainability of the supply chain. A robust business case for ethically traded flowers could therefore be established and importantly the project would provide insights to be transferred to other countries and supply chains.

Short-term social needs of flower farms and workers were addressed in Work Package 1 to deliver the first objective. Over 6,000 direct beneficiaries were reached through the provision of health packages and kitchen gardens, with 98,000 indirect beneficiaries reached through a COVID-19 communication campaign (Taylor et al, 2021: 2). Then the longer-term sustainability of the system was addressed in Work Package 2. This included on-farm gender training, training for 171 workers on developing income generating activities, and grants to four farms to pilot farm diversification activities. Here we explain what the third Work Package involved, which Coventry University led on.

Work Package 3: Promoting fairer trade purchasing, awareness and demand[3]

Key areas of focus:

- **Retailer to retailer learning:** Trade models discussion with the Co-op, Tesco and M&S. Feedback via FNET and incorporate into research.
- **Consumer behaviours:** Research into consumer behaviour relating to certification and Fairtrade during COVID-19.
- **Fair purchasing practices:** Retailer to supplier roundtables. Purchasing practices and terms of trade (ToT). Exemplar ToT for dissemination through research and FNET.
- **Supply chain to government learning:** Feed learnings into Kenyan and UK governments via partners and industry bodies.

Key intended outcomes:

- Flower farms are able to improve their resilience, and that of their workers, to withstand the challenges of COVID-19 and any future 'shocks' and ensure greater wage security going forward.
- A more sustainable and robust retailer/supplier/grower relationship is created.
- Increased government awareness in Kenya and the UK of the challenges faced by flower farm workers and the ongoing support needed.
- Consumer understanding and awareness of Fairtrade and certification within the flower industry is strengthened and sales of Fairtrade flowers increases.

[3] The details of Work Package 3 as outlined here are drawn from the original proposal submitted for funding.

Research Methods

To achieve the objectives for Work Package 3, our research design utilised a mix of methods. *Secondary data* was captured via the mainstream media, trade press and social media. These sources were targeted in order to track responses to the pandemic and reports of its impact as it unfolded during 2020/21. These sources provide important context for the testimonies of industry stakeholders engaged in interviews, focus groups and roundtables. Specialist market research outputs accessible via University-owned licences were accessed in order to capture insights into retail trends and projections during the pandemic, for example Mintel and Nielsen reports. Additionally, we reviewed academic research focused on changing consumer behaviour in the last year, especially where it relates to ethical criteria in purchasing decisions. These secondary sources were monitored throughout the lifetime of the project.

Primary data was collected via three main approaches: key informant interviews, focus groups and roundtables (see Figure 1 below). The purpose of these data collection techniques was to offer different stakeholders within the industry the opportunity to share their experiences of the impacts of the pandemic upon their organisations and their own internal and external stakeholders. Through this approach we were able to understand how different parts of the supply chain have been affected and how pressures and decisions focused upon one node in the supply chain affect other nodes. Therefore, we have engaged with a variety of stakeholders in the cut-flower industry, many of whom have significant responsibility for operational leadership and strategy within their organisations. These included retailers (ethical managers and category buyers), UK-based suppliers (at executive level and sustainability specialists), Dutch-based suppliers, the Floriculture Sustainability Initiative, a certification body, the Food Network for Ethical Trade (FNET)[4], the British Florist Association, and Union Fleurs.

Category	Number Completed
Retailer	5
Supplier	6
NGO	2
Other industy stakeholder	4
UK grower/florist Focus group	2
Roundtables	5

Figure 1: Interviews, focus groups and roundtable overview

In addition to these interviews, in order to gain a sense of the flower-buying public's attitudes and behaviours we consulted with florists (including high street operators and those who also grow their own flowers on small-scale plots) via focus groups. To reach supermarket flower buyers was more difficult in these restricted times, so data mainly came from external sources as described below. Furthermore, five Roundtables were scheduled within the project's timetable (see Figure 2). These offered a critical contribution to the gathering of data and the sharing of good practice within the project as the core participants are the project's main partners – Fairtrade Foundation, MM-Flowers, Co-op, Tesco and Marks and Spencer, Women Working Worldwide and FNET. The lead person for ethical trade from these organisations engaged in each event and people with other responsibilities within these organisations were invited to join where their expertise added value, resulting in up to five or six representatives from an organisation sometimes contributing. VP Floriculture, Fairtrade Africa and Partner Africa also attended some roundtables. In addition, the European supermarket Jumbo and the Dutch Impact Institute were invited to provide their insights and findings from their research into Human Rights Impact Assessment on two Flower farms in Kenya, including research into living wages in the cut-flower industry. These events were held under Chatham House rules in order to promote openness, sharing and transparency. Details of the topics discussed in these roundtables are provided in Figure 2 below, and the data was analysed using thematic coding.

1. Retailer Roundtable: Flower buying and ethical trade during peak periods during 1st wave.	25 November 2020
2. Supply chain Roundtable: Flower buying and ethical trade during peak periods during 2nd wave.	29 January 2021
3. The distribution of value in the supply chain	29 March 2021
4. Sharing of learnings of project to date and ideas of good practice. How would these work for you in reality?	6 May 2021
5. Reflections across the projects, main findings, and actions going forward – will you do anything differently?	24 May 2021

Figure 2: Roundtable themes and scheduling

[4] FNET was set up in 2016 as a 'collaborative initiative aiming to use the collective leverage of suppliers and retailers to bring about positive change in working conditions in global food, beverage and horticulture supply chains by providing guidance, resources, training and opportunities for collaboration'. See: https://foodnetworkforethicaltrade.com.

Market Research Database and Press Review - the Consumer Perspective

Section A – Data from publications on phase 1 of the pandemic up to Summer 2020

Five main databases were identified to be most relevant to this research: Mintel, Passport Euromonitor, IBISWorld, Statista and Marketline on Business Source Complete. In the methods design, key search terms were identified and criteria developed for including search results. This included publication date, common themes and consumer purchase context. The same search terms were used with each source for consistency, and saturation point was met when no new reports that met the criteria were identified.

A total of 1,589 reports were identified as relevant to the key search terms and selection criteria during the first round of reviewing these five databases. Scanning of these identified the report that best matched the needs of this study and was used to select examples of the recurrent themes. Some reports were also deemed to be pivotal in providing original data. It is though important to note that these reports are from particular sources, in market research bodies, who may be very influential but as with all sources, need to be questioned in terms of how, when and why the data was collected. Our aim here was to understand how the industry was understanding the pandemic impacts and how this was being presented. Headline insights from this analysis are highlighted below.

Changing consumer behaviour in purchase type and motivating factors

- Flower purchase not only for occasions but increasingly to brighten home and mood, buying for **well-being**. This was at the same time as the impacts of the pandemic on mental health were increasingly recognised.
- Increased consumption of flowers from **supermarkets** compared to florists.
- Increased buying **online** – not only of flowers, but part of wider move to online and involving a range of demographics.
- Increased impact of **social media** on consumption patterns of flowers and plants.

Sustainability

- Supply chain logistics were seriously impacted, especially towards the beginning of the pandemic with airports closed and movement restricted, and big differences experienced between countries. From a sustainability perspective, this served to heighten consumer awareness of supply chain length and provenance, drawing attention to flower miles and conditions. This linked into the need and then desire for short supply chains and the local agenda.

- A major focus on **locally grown** was increased with campaigns hooking onto key calendar dates to promote this. Partly this keyed into a trend for supporting local businesses, so flower growers, but also linked to availability and logistics, as well as the underlining potential sustainability benefit of fewer flower miles.
- **Packaging consciousness** increased, moving some to promote plastic free and reduced packaging as a selling point. This needs to be seen within the context of the growing concern for plastic use that had been building in the years prior to the pandemic.
- An **online presence** was seen as crucial for sellers, not only for flower sales but also for offering workshops and other engagement with consumers. Much of which focused on sustainable themes such as gardening techniques, floristry skills which care for products better and longer, as well as fitting into the **DIY trend** of the pandemic – whether grow your own or make your own wreaths.
- Increased purchase of **house plants** seen. This can be linked to the trend of brightening home and mood as well as wellness, with the properties of plants being extolled. Also the house plant trend is being promoted as being a sustainable option as they last longer and can be bought in their own pot to be reused rather than plastic packaging. There has been a linked growth in artificial plants, which can be long lasting, but the same health benefits are not associated and the materials and production have different impacts on the environment.

Section B - Data from trade and other press issued on phase 1 of the pandemic up to Summer 2021

In addition to the structured thematic analysis of specific market research databases that Coventry University have access to, the team have also been systematically collating and analysing mainstream press, social media and trade publications, as well as academic sources related to the cut flower industry and wider consumer behaviour. The aim of this has been to track responses the pandemic and how they are reported over time.

This data feeds into the themes we have identified as being most significant in other parts of this report and also informs the recommendations made.

Firstly, in terms of general ethical consumption practices during COVID-19, some significant trends are very relevant to this project. These are evidenced by a range of sources, but here we draw mostly on three useful reports that have been released. A study by Ethical Consumer (2020) showed that Fairtrade sales increased 13.7% between October 2019-October 2020, 'strengthen even further as 28% of people plan to purchase Fairtrade in the future, compared to just 15% pre-pandemic'. In a similar vein, 'Organic sales increased by 19% in the 12 weeks ending May 2020 and 19% of people intend to buy organic products after the pandemic, compared to 8% pre-March 2020.' This suggests that an increasing number of consumers have been considering both the ethics, origins and the impact of their purchases during the pandemic and are intending to in the future. This would suggest that Fairtrade/organic or environmentally certified flower sales could be set to further increase due to consumers desire for ethical assurances of being reliably sourced.

Furthermore, Ethical Consumer (2020) noted that 'intention to reduce the use of single-use plastics is set to increase with 54% saying that they will be even more focused on this issue post-pandemic'. This consumer desire to reduce plastic significantly impacts how cut flowers are to be packaged and the demand for less plastic use in the future is suggested too.

Trends towards local and re-use have also been highlighted, as Ethical Consumer (2020) found that 'people spent around £3.4bn in local shops during 2019, and as people continue to stay close to home, this figure is set to increase significantly in the future. Research has indicated that 60% of consumers have said that post-pandemic they expect to buy from local shops (compared to 40% shopping locally pre-COVID-19 giving a promising indication to independent retailers outside of major towns and cities for 2021 and beyond. In relation to second hand shopping, it was found that '21% of people are spending less than usual… with 42% of people planning to buy second hand in the future'. Indeed the 'rise of apps such as Depop, which doubled in subscribers between March and May 2020' is also seen to evidence this ethical consumer trend. Whilst this might seem less relevant to our understanding of the flower industry, it is against this backdrop that decisions are being made and it could still be relevant – such as use of second-hand and vintage vases, bringing your own vase to be filled at the florist and using flowers to refresh décor rather than refitting.

In a similar vein, two Mintel reports (2021a, 2021b) provide further evidence of key movements within the wider ethical consumption arena. A few highlights of these include:

- Consumers seek further transparency from brands – not just carbon offset. COVID-19 has taught them that no person or brand is an island – we must work together.
- Consumers take a person responsibility – they are owning the fact that there needs to be changes. Rather than saying it is government or the brand's fault for example.
- Consumers are adopting technology to become more sustainable e.g. apps
- Consumer demand is changing business roles – ethicists will be on the board to resolve issues.

There are various ways these transfer to our analysis of impacts on the flower industry, one being alternatives to the current 'sustainable packaging' for flowers, such as the example of a 'living box' shared on Mintel. Indeed, it was reported that 57% of UK and USA consumers believe brands should be using more recyclable packaging (Mintel 2021b). An overall trend in consumers demanding greater transparency of environmental reporting is also of relevance, with 49% of UK household stating they care about product impact but can be unsure about what 'environmentally friendly' means. There was also a stated interest in the water footprint of products and the meanings behind it (Mintel 2021b).

Then secondly, in terms of key sources more directly related to the cut flower industry in COVID-19, the sources are much more diverse and our analysis is nearing completion. To offer some highlights here, we have selected evidence to suggest the diversity of press and industry coverage, however the key themes we are drawing out are common ones.

Linked to above consumer concerns about waste, we have had articles such as the BBC (2020) about a young florist donating leftover flowers to retirement homes. A common story which often involves donations to front line workers. Indeed, some online florists continue to offer discounts to care workers. Artists have also been turning flower waste into reusable articles and using this to discuss reuse and waste (ABC, 2020). This is much stronger though in terms of consumer concerns for the environment around packaging, growing, water and transportation impact. This is demonstrated for example in Bloom & Wild's sustainability reporting and discussion of eco-sales (2020), as well as trade publication discussions of the prioritisation being given to relations between the planet and humans (for example Bek quoted in Horticulture Week, 2020).

A new or renewed positioning of the product has also taken place to capitalise on the restrictions brought by COVID-19, in terms of them being able to deliver 'substitute hugs' (Guardian, 2021; Bloom & Wild, 2021). 'Celebrity' florist Simon Lycett was quoted in a BBC interview (2021), claiming 'I've always said flowers knock the rough edges off life'. This links to the wellness trend previously reported, but in terms of the buyers wellness and in terms of them attempting to improve the wellness of who they send flowers too when in lockdown. Online firm Bloom & Wild doubled sales thanks to the pandemic and its letterbox-sized packages, and 'Interflora as the UK's biggest florist after doubling its sales as COVID changed the way Britain bought flowers' according to the Guardian (2021).

This wellness focus is not though only linked to flowers. There has been a significant focus on the growth of gardening and growing your own, not only with food but also flowers, which can also be related to a stronger interest in where flowers are grown locally and slow flowers too. The trebling of 'gardeners' was reported by Horticulture Week (November 2020) if this is defined by garden related sales, as the HTA Garden Retail Monitor reported that sales of gardening products were up 34%, 17% and 19% in June, July and August 2020 respectively in UK garden centres, compared with the same period last year. Additionally, sales and promotion of house plants has also been a key trend. In looking at the changing patterns of consumer behavior with regards to house plants, garden plants and cut flowers, Mintel (2021c) identified the following:

- Difficult time for florists over the 3rd lockdown as they were shut for major events – Christmas, St Valentine's day, Mother's day and Easter
- Behaviour data showed 91% of consumers will send flowers no matter the occasion, 82% of consumers say that flowers/house plants improve their mood, 64% of

consumers realise the health benefits of house plants/flowers in the home and 46% of consumers used click & collect/curb side collection for flowers/plants

- Important factors of flowers for consumers were recorded as 26% for locally sourced being a priority, 22% sustainably packaged and for 54% the most important factor was the type of flower/houseplant
- The top 6 sellers of flowers are supermarkets: Tesco (30%), Sainsbury's (21%) and Morrisons (18%), Asda (17%), Aldi (17%) and Lidl (15%), with 'florist' at 12%. Bloom and Wild was 15% but the survey did not mention household names, such as Interflora.
- In terms of how consumers shop for flowers: 70% - Instore, 26% - Online (laptop/computer), 18% - Online (smart phone), 12% - Online (tablet)
- In terms of purchasing frequency, the highest % at every 2/3 months (21%) and 2nd closest 19% was once a month
- In terms of breakdown of purchases: 50% - flowers, 35% - house plants, 38% - other

Consumers were described by Mintel (2021c) as shopping more locally, with some retailers supported local florists with at least some of their offer e.g. Sainsburys and Bloom and Wild. Booths supermarket are currently experimenting with an in-house space for a local florist/grower launched in May 2021. Mintel name this consumer category as 'locavore'.

Suggestions to boost online sales from Mintel included 'other initiatives that would help retailers drive sales online are virtual workshops and live Q&A sessions on social media platforms like Instagram. For example, Floral Merchant London offers virtual workshops for DIY succulent terrariums, while Bloom & Wild have a series of How-To videos on its Instagram account'. Also connected to this, younger shoppers, were seen by Mintel (2021c) to be boosting this trend, particularly due to wellbeing related to houseplants. The British Florist Association (BFA) found in their survey around Valentine's Day too that Click and Collect was a very big change for high street florists (BFA 2021). This is a move that suits tech-comfortable florists and consumers, and also provides an opportunity for displaying more information about origins and sustainability information than is often the case instore. Therefore, again we see evidence emerging that supports new behaviours and consumer interests that are very much in-line with promoting ethical, sustainable and resilient flower supply chains.

Key findings from Primary Research

The analysis presented below is drawn from the key informant interviews, roundtable discussions, focus groups and reviews of industry media. Key themes have been identified around which the written analysis is focused: supply chain disruption February-April 2020; initial and enduring impacts upon workers; buying relationships, stakeholder responses and re-configuring assurance; recovery in the market; thinking longer-term about resilience. Each point is illustrated by indicative quotes drawn from the roundtables and interviews.

Supply chain disruption February-April 2020

1. There were **major disruptions** throughout cut-flower supply chains during **February/March/April 2020** from production, through logistics, processing, retail and consumption. Lockdowns in Europe severely disrupted demand. The FloraHolland auctions were hit hard with revenues down 85% in March 2020. As demand plummeted so did prices at this stage of the crisis, leading to the auction cutting back on the quantities of flowers being available for auction. As a result, millions of stems of flowers were composted in Holland whilst millions of others had to be destroyed at production sites across the world as there was simply no way of getting them to consumers.

The quotes below from different stakeholders in the supply chain, paint a picture of the severity and complexity of the challenges confronted within the industry during the early stages of the pandemic in 2020. Key themes to emerge include: the impacts of lockdowns in Europe and the US; transport problems within and from Kenya; the essential status of flowers in some markets, impacts of lockdowns upon producer sites and the rapid collaborative responses which helped to ensure communication between different stakeholders during the crisis.

'Friday the 13th was really the big thing …that triggered really the whole crisis of the sector that day, the Dutch auctions collapsed, literally collapsed so then there was the demand completely collapsed and basically yeah flowers were not sold that day and that's why they had to start destroying … and then we talked about this domino effect that the whole chain collapsed because there was a problem with demand and that came from the lockdown measures that were taken in most European countries and also in the US where basically the non-essential shops were closed… so there were no distribution channels any more, there was no demand except from the retailers.'

European flower industry body

'Kenya was really struggling with transport, and also that they largely only really sell to a retailer or supermarket segment in Europe in particular, whereas Kenya, obviously, you know, florists, weddings, hospitality, a whole sector that kind of disappeared and didn't really come back. So even within East Africa, we've seen quite a huge variance and how the farms have been hit. And definitely Kenya was really one of the worst.'

Fairtrade representative

'there's quite panicked calls coming through from lots of people, from mainly suppliers. And they are saying we've got a problem. So, we've got a major issue. … probably suspect that it was only about four to five weeks that the market fell out. The bottom of the market completely dropped. What do companies do? Look after the bottom line.'

NGO representative

'there was sort of challenges around non-essential products in trying to protect, particularly on the flower side, the continued supply in that kind of crisis management mode. I think, from an ethical trade perspective, in terms of our conversation with suppliers, it was just immediately a real focus on how do we protect workers? How do we put in place the appropriate protections? How do we learn from each other? How do we provide the guidance and best practice on this very new issue …you know, there was no precedent … So, an immediate reaction, the right response is that, we began to talk to each other as new with our suppliers with our retailer partners and work collaboratively on solutions. The fact that we already have some of those networks in place, particularly with organizations like the Food Network for Ethical Trade, and others, was actually really helpful, because we were able to come and respond very quickly in terms of providing the right guidance and support to our suppliers.'

UK retailer RT 1

'I think probably Fairtrade flower orders were quite quick to drop as a more expensive line, and then suddenly getting updates through from the farms in Kenya about the implications to that on their ability to operate. And then slowly as that moved into a scenario where they were really struggling to export when passenger planes stopped and there wasn't really any available freight and then the cost of that freight, essentially being impossible to afford and then slowly moving into a scenario where COVID hit Kenya and

workers weren't allowed on site in the same way and so productivity was very low because they could not have all their workers on site and so I think it was really watching that unfold and essentially our role was just to share that information with the market and let people know what was going on but with the kind of understanding that there was an enormous amount that a lot of people could do about that and that it was a bigger situation than any individual partner to fix.'
UK retailer RT 1

2. The **labelling of flowers as 'non-essential'** items led to squeezing within the supermarket retail space and in some cases flowers were pushed out altogether. Furthermore, florist shops were unable to open for face-to-face sales in many countries, including the UK. Therefore, there were severe impacts upon demand in the initial weeks of the crisis.
The net effect was to dampen demand with severe implications for growers.

'our sales … obviously dropped off, which had that recurring effect, because people were panic buying time. And everybody was buying crazy amounts of flour and toilet paper and all those other things. And when you're panic buying you obviously didn't think about picking up a bouquet of flowers.'
UK retailer

'And that's when everyone just started to panic buy … the non-essential products in the supermarket just got driven down, which for us - flowers, that was a major hit.'
UK supplier

3. Examples of **problems included logistics issues** such as flight cancellations, reduced freight capacity owing to prioritisation of PPE transfers and significant increases in freight costs, up to 400%. Sea freight was also disrupted as containers became stuck in ports around the world and other products, such as PPE, took greater priority for trade.
In Kenya, for example, fruit and vegetable exports were prioritised over flowers. One of the results of the breakdown in logistics was that cut-flowers, as a perishable commodity, had to be destroyed.

'the main issue was that freight services was extraordinarily expensive. So that was a really, really big issue.'
UK supplier

*'Literally the supply chain stopped working because the aeroplanes were not flying any more so that was a big issue for the producers in Africa in particular that they could not export anymore because the logistics wasn't there.
We talked about this domino effect that nothing was functioning and it was at the peak of the season as Spring is really the peak season for flowers and plants so it was big damage everywhere for the producers in Europe, in Africa, in South America, the shops, I mean it was just a massive, massive crisis and because the products are so perishable you can't do anything with them you just have to destroy them and so it was a disaster.'*
European flower industry body.

'That's going to remain a big problem and again that's where the dependency of the supply chain on air freight is really a big issue… I think it's (the extra cost) automatically spread out but I would think that the producers, exporters are the ones taking the biggest share of it.'
European flower industry body.

4. **The Kenyan government** made decisions which hurt the industry in relation to transportation. Passenger planes that would normally carry flowers in their cargo holds were grounded, whilst cargo planes were largely out of action. Therefore, there was a significant shortfall in airfreight capacity leading to prices ramping up. The Kenyan government were criticised in some quarters for failing to step in to ensure higher airfreight capacity. In contrast Ethiopia's government ensures that the state-owned airline continued to operate including converting passenger planes into cargo planes. Furthermore, curfew restrictions on worker movements caused problems in the early stages of the pandemic meaning that it was difficult for sites to have complements of staff on site for as long as usual. This caused problems as night shifts in packhouses had to be cancelled resulting in overnight delays in getting flowers to the airport.

Some of these problems were overcome later in the pandemic as the government responded by converting passenger planes into cargo planes, provision of car stickers to vehicles transporting flowers to operate past curfew hours and speedy action in processing permits and exports.

'So the vast, vast majority of our product was coming from Ethiopia, which meant we could manage the pandemic a lot better, based on their markets and their government alignment with the freight services, that was a lot easier for them to manage. So, I think we managed it more than a lot of other companies will have done.'

UK supplier

'Ethiopia never quite experienced the shock in the same way, at least from the Fairtrade flower farms perspective, partly because it was a government owned airline. So, they were always able to get the flowers out of the country at time when Kenya was really struggling with transport.'

Fairtrade representative

5. Supply chain managers were dealing with immense **unpredictability** every day. Furthermore, the industry was gearing up for UK Mother's Day when the problems ramped up which should have been one of the biggest income earners of the year.

'Yeah, sales completely dropped off. I think we went about 40% down in the first week, also, which is quite significant. And that lasted for a while. And the problem that we saw immediately was that a lot of those kind of obviously, were in a peak, when the flower companies make their money, isn't it because it's Mother's Day, it's Easter, it's all those kind of things. So, to lose, to lose that kind of sale at that time of year is pretty critical.'

Retailer interview March 2021

Initial and enduring impacts upon workers

6. By the third week of March 2020, 30,000 temporary workers in Kenya had **lost their jobs** and 40,000 were placed on annual leave. The CEO of the Kenya Flower Council estimated that the industry was losing $300,000 per day. Cuts in income resulted for many workers. Increases in the price of food further impacted upon workers and their families as they struggled with reduced incomes. Figure 3 below, which is drawn from research undertaken by Hivos, illustrates the stark household budget shortfalls confronted by workers in the early weeks of the pandemic.

'Long before the onset of COVID-19, workers in the flower sector faced food security issues due to their low purchasing power. With reduced wages for some and job loss for others, these workers are now more vulnerable to food insecurity as they plunge deeper into poverty.'

Hivos (2020 p. 26)

'So the companies obviously were able to say, here are the people that we're going to retain, but we're going to put on half pay; here are the people we're going to put on enforced leave, but they're going to retain their contracts. And then obviously, your casual and your seasonal labourers forget it, because they won't be entertaining any extra business.'

NGO representative

'There was a very instant impact on the farms in Africa definitely. They did their best to keep people working and keep them on the payroll because obviously in those countries the impact was so big on people, it's not like here, they don't have a safety net, so they really need to work to be able to eat really.'

European flower industry representative

Monthly salary	New salary after pay cut	Monthly expenses
Kshs. 9000	Kshs. 4500	House rent = 1500 Loan repayment = 1000 Meals (breakfast, lunch, dinner) @150 per day = 4500 Water @20*3 jerry cans *30 days = 1800 **Total = 8800 (Kshs)**
This worker will be operating on a deficit of Kshs. 4300 per month. To survive the situation, she has suspended her monthly savings (Kshs. 500) to the sacco and is contemplating other austerity measures such as cutting down on her expenses around food and water.		

Figure 3: Hivos Report example of worker income deficit (Hivos 2020, p.28)[5]

[5] This report was based on an assessment carried out in April 2020, so taking in the experience of the pandemic from January 2020 until the report was written (Hivos, 2020, p. 6).

7. A key issue that has repeatedly arisen in our data collection has been the need to provide a **living wage to flower workers**. It is important to see this as part of a long running debate within the sector (Hale and Oppondo, 2005; Hivos, 2015), and in wider discussions of sustainable global supply chains too (Doorey, 2015; Mair et al, 2019). However, something quite specific has arisen in the research demonstrating how a gap in the value of wages related to production values, has been fundamental to the lack of resilience experienced. This was particularly so at the beginning of the pandemic, but continues to be experienced by some sections and sectors of flower supply chain stakeholders now (Impact Institute, 2021; RT 3 and 5).

Underpayment in the value chain has repeatedly been identified as a barrier to the sustainability of global flower supply chains and a critical reason for the suffering and precarity of flower workers when the pandemic hit. Indeed, this project addresses the rapid response needed for immediate relief of worker food poverty and basic PPE equipment that was unavailable at the growing end of many flower supply chains. The need to pivot support for basic worker needs has been strongly acknowledged by our stakeholders in both interviews and roundtables.

Round Table 3 was largely structured to address this issue more directly, with the Impact Institute sharing with the group their work on the 'real price' of a flower and the pilot scheme completed with The Netherland's national supermarket Jumbo, to promote sales of flowers where workers were paid a living wage and this was communicated to consumers. Figure 4: presents an overview of their social impacts scan of a rose from a Kenyan farm, highlighting underpayment in the value chain as having the second highest social cost (Impact Institute, 2021, p.11).

This coincides with additional work being done and promoted on the living wage (see for example: Fairtrade Foundation, 2021). The project team were keen to follow up on the informative discussions that followed in RT3, and in RT4 initial analysis was presented from work on the breakdown of costs from a rose by MM Flowers. As shown in Figure 5 below, it can been seen that whilst allocating exact proportions of costs to different stakeholders and categories is complex as a methodology, more work needs to be done on this to establish the extent of this underpayment and the different costs involved in addressing it (RT 3, 4, 5 and UK retailer interviews).

Figure 4: Social Costs of a Rose from Kenya (Impact Institute 2021, p.11)

The resulting discussions and follow up in stakeholder interviews focused not only on the need to address the underpayment of labour but also the need to better understand the dynamics through which wages are determined, the challenges of addressing low wages and initial discussions of potential solutions. Based on the analysis presented in Figure 5, a pilot scheme to involve the living wage being paid to workers in one project-linked Kenyan farm was proposed as a potential practical action. During RTs 3, 4 and 5 different levels of interest and concern were expressed by stakeholders about the potential for such an initiative. Different models for this pilot are to be explored and the challenges facing each stakeholder need be followed up on a 1-2-1 basis, but it is a significant outcome of the project that a commitment to pursue a solution to this undervaluing has been established, along with a desire to continue stakeholder collaborations. In our interviews a retailer noted the importance for 'points of difference' (characteristics of a brand that make it stand out from other competing brands), which can make it difficult to join in collaborative projects with other retailers such as Living Wages. This is a substantial stumbling block for promoting progressive change within supply chains.

8. There were many **challenges on farms** in terms of managing the workforce and ensuring a safe environment. Such challenges varied by country and site and included: productivity was affected by the need to provide sanitising time and to maintain social distancing; extra transport was required to ensure social distancing; curfews affected shift patterns; workloads increased for individual workers who took on extra burdens as the size of the workforce on site was reduced. The situation exposed deeper tensions between workers, unions and management on some farms. Women workers were especially impacted for a number of reasons including the expectation that they would look after their children during enforced school closures.

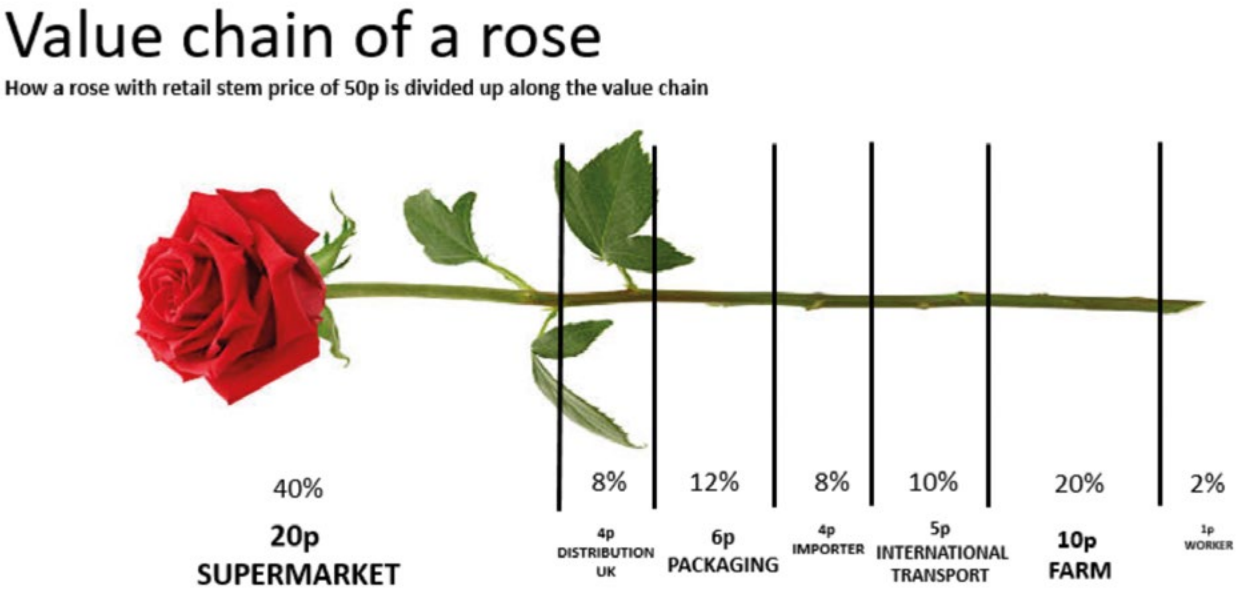

Figure 5: Value distribution with the supply chain for a rose, (MM Flowers, RT4)

'What came up as a priority for workers was around the fact that they had income streams being affected because of shorter work cycles, not hitting targets. And therefore, they had to go on leave, for example, unpaid leave in some instances, and therefore income streams were being impacted on and they had to look for alternative ways of making money.'
UK Retailer

'…brought up some really big issues around just little things that you wouldn't even think about like unsolved childcare, and how women have been really significantly been hit throughout the pandemic… the impact around health care and welfare is all over some really big issues which you don't immediately think about. You mainly just think about healthcare and food. And then when you look at the wider community impact and cultural impact it (the pandemic) has. It was massive.'
UK Supplier

'So, part of the resilience that might, from an outside perspective look like they've survived and have been resilient, have actually meant some very personal impacts on individuals and their families. But yes, resilience has come at a human cost.'
NGO Representative

9. One of the impacts of the crisis has been a wider realisation that workers are important and should not be taken for granted. Internal communications on some sites were enhanced during the pandemic as a result as management realised that workers were being hampered by a range of problems.

'there was some quite interesting learnings that have happened early on, that were about the value of things like worker committees, I don't know whether this has been discussed with you. But I think when there was a certain, you know, COVID happen, there was a sudden need for, you know, to communicate to workers to get them to do things around health and safety to try and, you know, trust them to know they were washing their hands, all those kind of things. And I think people slightly scrambled around to work out how should they be doing it and realise that actually they needed better relationships with their workers and with their worker committees than they had. So, we suddenly saw CEOs having meetings with their worker committees on a weekly or fortnightly basis.'
FNET representative

10. There have been **ongoing issues** as the production base re-structured after the shocks of 2020. Whilst the market in Europe may have largely recovered, albeit with some changes, the situation for some growers in Kenya has remained challenging as they have struggled to overcome the impacts of the initial phase of the epidemic. One high profile casualty was Harvest, a farm which supplied Fairtrade roses. The farm is reported to have been struggling after a change in management and market strategy. The pandemic provided the final blows, leading to the land being sold for non-farming purposes. Other farms have been forced to put capital investment projects, such as replanting roses, on hold. Responses to these challenges have included re-structuring of the production base via mergers and acquisitions and increased vertical integration with some firms investing directly in the logistics side to maintain control.

'One of the major problems that all these companies had was in the producing countries or here. It was a liquidity problem. It was a big cash flow problem when they had to destroy all their production, didn't have any incomes when they needed to have sufficient cash flow to be able to survive these difficult weeks.'
European flower industry body

'And for some, that just meant that they have not actually been able to sustain operations. And that really, we're beginning to see who's going to have survived the impact of the pandemic at this point in the timeline. And that means what we've seen is Harvest, who was one of the farms of this project, has ceased operations, which is really sad.'
Fairtrade representative

'We're also seeing in the same context, more mergers and acquisitions across farms as a way to bolster resilience, and particularly for small scale farms, who are really, really struggling to survive. And we've seen this as a trend in Ecuador too, that new ownership is coming in, or farms are beginning to sort of be acquired by larger groups of farms. So actually, the ownership landscape of the flower farms is really beginning to change, and I think will look much different next year when you think back to before the pandemic, and that what this is really showing from our side is that not really a surprise, but resilience is much harder when not at scale than for the small farms that this was a much more challenging time to invest in resilience with the resources that they have and the scale that they operate on.'
Fairtrade representative

'I think what the crisis showed as well is … the strong dependency of the supply chain on air freight definitely from Africa there was the big issue, so you see also now some companies trying to consolidate also their links with logistics to make sure that they are more in control of their supply chain, of the logistics, to make sure that if anything happens again that they have more say and more influence on the logistics.'
European flower industry body

Buying relationships, stakeholder responses and re-configuring assurance

11. There were reports that some **retailers broke contracts and cancelled orders** leaving farms and their workers in vulnerable positions as they lacked viable alternative markets. Other retailers did honour their commitments as they recognised the longer-term damage which would be inflicted upon their supply-base and communities. For growers who supplied into the auction or other on-the-spot arrangements there was no fallback position.

'I think one of the biggest issues that underpins everything in flowers, is the transactional nature of the customer to trade to farm relationship. And there's no real long term view of the product and also of the farm.'
UK Supplier

'So, during COVID-19, where there's no contractual obligation to keep sourcing the products, the customer can just turn the tap off, it just stopped. And that's when you do get these the significant issues and where it is such a vulnerable supply chain, because there's no contractual agreement underpinning everything… from an income perspective and cash flow for growers is just shocking.'
UK Supplier

'So, then you saw higher costs for freight moving forward even as it started to move forward. So, don't think it was the same terms and conditions. Quite cheeky arrangements are going on for those people that are doing it. I think a few of the more vertically integrated suppliers, were okay because they're controlling so many elements supply chain, they're all right. But for a pure out-grower, then you've got problems.'
NGO representative

'…all the risks, it was the grower, like any sort of risk is theirs. And if orders drop, or the customer suddenly wants to change, design or change the products, it's all on the grower. And I think that's where the wider sustainability piece and commercial sustainability really falls down. Because there's just there's no long-term view. From our perspective, what I'm saying there's no long-term view on how we source the product. It is very transactional. And we're going to be trying to focus on; how do we get the commercial partners in the retailers to understand how the decisions they make impact upon the most vulnerable people in their supply chain?'
UK Supplier

12. Supply chains with **strong pre-existing relationships** were able to be flexible and cope during the most difficult phase of the pandemic. The main reason cited being that two-way communication channels were required to ensure that problems could be dealt with most effectively. In addition, the Fairtrade Foundation and related bodies helped to provide guidance and support wherever possible for their growers. Organisations such as FNET and the Floriculture Sustainability Initiative (FSI), played important roles in ensuring that different stakeholders were talking to each other. Enhanced communication was absolutely key for maintaining supply chain operations, within companies/between companies/with wider stakeholders. For many stakeholders this has drawn attention to the problems created by the transactional character of the traditional cut-flower supply chain which has emphasised price as the dominant focus. The pandemic has drawn into stark

relief the imperative to think beyond price and ensure there is space to promote transparency, sustainability and resilience. Furthermore, it is important to promote the wider benefits achieved through the embedding of ethical practices within supply chains and communicating these to consumers.

'But also, people came to the forefront, particularly in our area. And I think I found we got brought into conversations we weren't normally involved in. So, I think the pandemic really helped, people that deal with, like buyers and technical people, it made them realise the impact of how important it was to have people in sites, which meant ethical stuff was a lot more supported. And all of the retailer external stuff done via FNET, actually was really well supported internally, which not to say it wasn't before, but it was never at the forefront.'
UK retailer RT 1

'You'll see other retailers are very much commercially focused, and it's all about cost and price. But unfortunately, the end consumer at the moment, isn't educated enough to really understand what goes behind a bunch of flowers. So that's one of the challenges we have, getting them to understand the impact price has. So, for instance Fairtrade, has more of a cost price because of the Premium but the impact that has in the supply chain is enormous. But getting a retailer to understand that. Yes, there's 10% more on your cost price, but from an ethical perspective, look at the impact it's having.'
UK Supplier

'And it's not just in an ethical trade perspective, it's also a technical perspective, and a whole host of requirements. And I think throughout this year, that conversation has always been, how do we minimise the workload for our suppliers who are really stretched? How do we kind of really be collaborative in our approach, in terms of our asks, has really been important this year, because it's not the time to be, you know, to be different, or to be to kind of having loads of requirements that are really challenging, it's about really having a bit of flexibility and having conversations with suppliers to say, okay, you know, we've got this shared, desire to increase transparency in our supply chain and understand what's happening for workers, let's try out something different, let's try out the research or new tools and worker voice technology. And we've had the freedom to be a bit more flexible.'
UK Retailer RT 1

'what we're trying to get better at is telling the story and telling the impact it has. And I think that's what Fairtrade recognise, they need to get better at this as well.'
UK Supplier

'If you want to be able to support suppliers, and support their workers, you need a shorter supply chain, whether it's literally short, or it's just shorter, because you know them really well. And you need to have influence and leverage and open communication channels and an ability to understand how to support.'
FNET representative

'Sustainability … time is what we see with our members, they know each other they they've been working together in working groups. This helps when there is a crisis, more easy to reach out to each other to discuss things in an open way. And so also this FSI network and the members have been able to, yeah, to contact each other. And I think that was also a good thing.'
FSI representative

'I think people have seen the importance of transparency in their supply chains. And it also has shown the flaws of the way we have been working. So, this flower, plant supply chain is a very tidy, very just-in-time type of logistical chain. And it works very well if everything is in place. So you are able to get your flowers from Kenya on a daily basis or back, cut them and go into the market and send the plane back with inputs, like fertilisers or whatever it is, or the materials. And when this is broken it also it points out two things. One is that we are vulnerable in our supply chain, because it's a very cost driven supply chain. And so, people have seen that they have to think about alternatives. And they have to think about different ways of organising things. And also, they've seen that the relationship that they have, with everyone that is involved in that supply chain is very important. So, if you don't have a good relationship, … no relationship, or you're just operating on the spot market, then you have to adapt to what is what is coming towards you. So, you're always reactive. And I think people just from a business point of view, they don't like the risk.'
FSI representative

13. Use of technologies has enabled the development of **beneficial relationships** within supply chains.

'We've kind of managed to keep in touch pretty well by different tools, in terms of we've done WhatsApp groups with worker committees, and those kinds of things. We've tried to do online training sessions and all this sort of stuff as well. We've been involved in the kind of cross retailer discussions. So, we've trialled a few kinds of new approaches in terms of how we communicate with farms. And actually, I think that will probably carry on a bit more. I mean, it's been quite effective, being able to have some quick discussions with worker committees via WhatsApp.'
UK Retailer

14. The provision of **emergency relief funds** made available by various organisations to respond to the crisis played an important role in ameliorating the very worst impacts for workers and their communities. The Fairtrade Standards Committee agreed that the Fairtrade Premium could be used more flexibly to meet immediate needs. This included: permitting direct payments to workers in cash; speeding-up the approval process for expenditures and increasing the range of permissible activities that could be funded. As a result, funds could be spent on COVID-related health and safety, information campaigns and food distribution. 17,000 flower workers across 30 farms were reached with support as a result. A COVID Relief Fund was also set-up which partners donated to.

The Waitrose and Partners Foundation provided £88,000 from its Global Fund to support its suppliers in Kenya (flowers and other produce). The funds were used to provide healthcare and sanitation measures, to improve access to childcare and food packages for those on reduced income. The Kenya Flower Council in partnership with the Hivos East Africa Women@ Work programme supported 7,500 workers in the flower sector with food packages and mobile money transfers worth Ksh8million (£53,000) (Hivos 2020). Through the Vulnerable Supply Chain Facility (VSCF), including this project, help has been provided to 6,000 people with health packages on 11 farms, set up kitchen garden kits for 3,000 workers across 5 farms, nutritional gardens on two farms, and training on gender. Whilst it is was impressive that such schemes could be made available, relatively quickly, there were also issues of equity as not all growers are linked in to supply chains through which assistance was available.

'Over half a million Euros have been distributed as support to workers to buy food, health equipment, and helped cushion the reduction of wages during a critical time. It has been a time in which many workers not only suffered a loss of earnings, but also had to support more family members than normal.'
(Fairtrade 2021, p.14)

'Fairtrade itself decided that some of the funds have been paid out as salaries for the farms. So, I think that was that was a good decision on their part. Normally funds that will be for school or hospital, some other project, but they actually said it just helped by paying farmers. And other farms that were not Fairtrade obviously don't have those kinds of funds to pay out.'
European Retailer

'…the support of other well-wishers would be useful in closing in the gap created by partial aid directed to a segment of workers since not all farms are Fairtrade certified. As noted by Bernard Mukaisi of KEFHAWU who said this level of support would leave out many equally deserving cases from farms that do not have Fairtrade certification.'
(Hivos p. 27)

15. The need for **greater communication within firms**, especially retailers, has been made very clear. Typical there has been a tendency for departments within firms to operate in silos. Ethical trade teams have had to battle hard to disseminate their messages and policies across the business. However, the experiences during the pandemic have reinforced the imperative for ethical and sustainability issues to be embedded within the overall modus operandi of suppliers and retailers. The need to respond to the crisis thrown up by the pandemic have encouraged these discussions and there are promising signs that ethical issues are now being taken more seriously as part of core business.

'I've seen across the business people coming together in ways that I've been wouldn't have necessarily seen.'
UK Retailer

'And I think two key words that come out very strongly and alters the lesson for us to be looking at embedding is around collaboration and communication, and collaboration with not only with other retailers or suppliers, but also within our own business.'
UK Retailer

'I think this pandemic has really shown that there is that there is a huge gap previously, when it came to issues around sustainability, your human rights, it was your responsible sourcing teams driving the agenda. And with the pandemic, it's just brought everyone across the business together and forced conversations to happen more frequently, whereas it wouldn't have had happened with such regularity before. It's also brought our leaders within the business to the forefront on the issue of sustainability, we find that there's a lot more public platforms, where senior leaderships are taking definitive positions on the issue of sustainability. We've had, you know, some of our directors, as well as our CEOs, making public commitments around quite ambitious targets. Something that resonated with us, from a director giving that kind of commitment it was really refreshing to see.'
UK Retailer

'there's a … slight shift within the power structures that are there. And sustainability and ethical and environmental issues started to come much more to the fore.'
UK Supplier RT 1

'but it was a massive increase in communication. So that was that was a key thing in order to get that communication on a better footing. And I think also, somebody else mentioned about FNET. I think that was a crucial area for us to be able to communicate with others in the field, to have that conversation.'
RT 1

16. The ability to **certify** via audit has been compromised during the pandemic. This is troubling as problems on site were likely to be emerging (such as modern slavery, H&S violations especially around COVID-19). Due to movement restrictions these issues have been largely 'invisible'. The crisis sped up innovations such as remote auditing and worker voice approaches. Remote audits are viewed as a reasonable stop-gap measure but pose challenges for sites that need high standards of internet connectivity to share documentation and to participate in virtual meetings. There are also concerns about the ability of sites to ensure that problems are not exposed (i.e. selective use of images and video links 'dropping' out at key moments during live site tours). There has been some usage of worker voice technologies *(see report from this project produced by Partner Africa which is summarised in Fairtrade Foundation 2021)*, which have proven very informative and drawn attention to issues that have not previously been prioritised. Feedback regarding the benefits of worker voice has proven very positive. Coping with multiple audit requirements has been a major issue for many producers who have been overstretched dealing with all the organisational challenges generated by the pandemic. Some stakeholders are expressing concerns that worker issues are increasing and that this is making it harder to ensure that supply chains are sufficiently compliant.

'And a lot of the Dutch companies had significant issues, because they were a lot more alignment to the Kenyan supply chain. So, from an approved supply perspective, they had some very significant issues in terms of certifications.'
UK Supplier

'There was definitely some significant challenges, even this year. So, for Mother's Day, our own unapproved sourcing was up from last year.'
UK Supplier

'So modern slavery came way up the agenda. There were issues around people using pesticides. So, [redacted] was doing lots of pesticide testing to make sure that, you know, people weren't sneaking in pesticides. We know that there have been impacts on the flower and the flower quality, because people were worried about not being able to get fertilizers. So, they were they were eking out the fertilizers to the flowers, and the flowers were getting smaller and suffering.'
UK Supplier RT 1

'But this was a particularly challenging time for them, because they didn't really have the ability to get auditors on site. So that was challenging... So we've seen a lot of audits that have come out with a lot more non-conformities. And we'd expect that because of the challenges over the last few months, typically because of supply chain disruption. So all in all, it's been very hard, particularly because we get different opinions and directions from the retailer. So, they're not all aligned.'
RT 1 UK Supplier

'In terms of alternative ways around due diligence, I think COVID has really thrown open the vulnerabilities of workers, especially around women, and the fact that our normal due diligence approaches are just not working. And so, how do we ensure sustainable supply chains where workers are rights are protected? And where there are breaches? How do we remediate that effectively, I think that's been one of the greatest learnings that's come out over this past 12 months, where we've just been immersed in different cases around breaches, where we would have normally considered those sites, you know, as good practice sites.'
UK Retailer

'Worker Voice definitely has a place in understanding issues more. And whereas previously, we relied on traditional due diligence methods, which just gave us a snapshot and there were signs telling us audits were not working in addressing your deepest systemic issues. I think it's forced us into a place where we need to consider other tools in our toolbox, and look at other methods of gaining that kind of intelligence.'
UK Retailer

'So, the auction can get a little bit messy. So, we have been working with the auction now for the past 12-16 months through the Dutch Flower Group to give that wider traceability. So, the auction now when we are buying on the clock provides FSI data so we know whether it is FSI compliant or not on the clock and that helps the buyers find the best source for us. But again I am completely honest and realistic that there is definitely time during events when where there will be unapproved, non-compliant sources coming into the business. That's just part of the issues we have unfortunately and that will be consistent across every single trader.'
UK supplier

'…will always be too much of a risk for ethics so I think that's something that we're going to be pushed more to an extent to do virtual audits but I think there's gonna have to be some sort of hybrid in terms of an in-person element and a virtual element…I don't think we'll ever lose that in-person element even though a lot of work interviewers are saying how positively they're getting feedback from workers via video calls I think that that because they feel that it can be more honest because there's not someone in the room, it's got an anonymity to it.'
UK Supplier

Flowers bounce back

17. **Cut-flower sales** recovered quickly in May/June 2020. There was a rapid switch to increased online ordering. Pre-existing online services experienced considerable growth. This required a rapid pivoting in business practices by various players within supply chains. There was a noticeable trend towards the purchase of bouquets at higher price points. The sector has remained strong subsequently with many firms reporting successful years despite the immense disruption at the start of the pandemic. Some firms have reported a slight decline in volumes but revenue has remained consistent as higher prices have been absorbed by the market. There has been some evidence of increasing interest from consumers in 'local' flowers (see Section A above). During the first wave there were signs of increased awareness of ethical and sustainability issues from consumers, but the jury is still out as to whether these were passing trends or a decisive shift.

'After April the shops started to open again across Europe and the US as well, so there was relaxation and basically the market re-established itself quite quickly to the point where basically at some point people were saying why this is a fantastic year, the sales really went through the roof in May, June.'

European flower industry body

'The impact has been quite high and it's been very different to locations, different to product, different to outlets to, if you are a garden centre in Western Europe, you've had the best year ever. And if you're a grower in Kenya, supplying the whole market, you've had quite a lot of challenges and problems.'

FSI representative

18. **On-line sales** platforms offer an enhanced opportunity to communicate with customers about the ethical and sustainability stories of flowers. In-store these opportunities are limited by lack of physical space and small labels.

'We must recognise that flower buying habits have changed in the pandemic, and…everything going online, and it gives us a great potential to tell the story. And I did think that the example of the increased price per stem was very interesting. Now perhaps to make the case for that via these online channels where people are able to follow much more than just kind of picking something up in store. I think there is great potential there.'

UK retailer

19. The **consumer bounce-back of flowers** is attributed to people finding comfort and joy in having and giving flower bouquets. Furthermore, there has been a movement into higher price points. One florist observed that his business had received its first-ever request for a £200 bouquet.

'People really want flowers. And I suppose when they can't do much else, they start thinking about beautifying the home. Yeah, putting flowers into the home to cheer everything up, bring joy…. So, it's been fantastic. I think the retailers have also played a big part in that as wholesalers, because there's been an incredibly buoyant movement of product into those channels… we had quite an aggressive promotion strategy to get customers into buying those flowers again, and it just worked. It worked very well. The demand was there. Pricing was right. volumes increased and sales increased.'

Flower exporter

'Even just retail sales is enormous, because at the moment, where else do people go? There's nowhere else to go apart from a supermarket. So, the traffic in supermarkets is so big. And people want to buy flowers and ice cream and now flower sales are really big. I mean, the first three months of the calendar year for flowers is crazy. Because you've got the back end of Christmas, Easter Mother's Day Valentine's Day. And it's just constant…And it's basically say we've been in better mode since January. Sales and orders are so high, which is great.'

UK Supplier

'Because obviously, it's been a very busy period. Valentine's Day, Mother's Day. We've never had such a busy Mother's Day…What we did not bargain for was the value of the orders. You know, we've never had a £200 hand tie (bouquet) before…. it takes a lot of flowers to put in a £200 hand tie! So, we ran out of flowers on Sunday.'

UK Florist

'Yeah because also one element that I did not mention that came out of the crisis is also renewed interest in local production and in some countries like you take France for example, France is now very focussed on sourcing locally for all kinds of commodities including flowers, fruit and veg definitely but there's a sort of renewed interest for everything produced locally and yeah that's an interesting discussion.'

European flower industry body

Thinking longer-term about resilience

19. **Crises are inevitable**. COVID-19 is an extreme example of a crisis, in terms of the profound and global nature of its impacts. But crises occur regularly within supply chains and will continue to do, especially as the impacts of climate change unfold. Therefore, ensuring that resilience is embedded in the way that supply chains operate is crucial. Resilience is supported by features such as emergency response provision for acute moments, good communication within firms and between stakeholders and communication beyond individual supply chains.

'It's really interesting all around. I think at the moment that for completely different reasons, we see the same things happening that happened in Colombia and Ecuador, 7-8-9 years ago, when then it was a case of the devaluation of the peso…So I think, that's one of the themes that whatever the shocks are, they come around again, and again, and again.'
UK Supplier

'Our challenges are more related to … climate change, moving non-food products around the world in aeroplanes and in plastic, from politically tricky countries, and water scarce countries. That's probably our priority issues which we are addressing as an industry or as a business, The various crises will come and go. But climate change is going to be a huge driver of change for all of us in the next five to 10 years and it's already started.'
UK Supplier

20. **Brexit** has proven to be a complicating factor, which is having a variety of impacts upon the industry and is pushing up prices. It is not easy to distinguish between pandemic impacts and Brexit impacts. Brexit should not be ignored as an area for lobbying as negative impacts on the UK end of the supply chain will resonate back to producers. Equally, any opportunities that may benefit cut-flower supply chain stakeholders should be identified.

'So, Brexit is causing us all sorts of challenges, not just in paperwork and exporting and importing, etc. But labour, you know, the labour situation in the UK at the moment is dire. There's an awful lot going on structurally that, is causing, big concerns, but it's going to be a bumpy few years COVID or non COVID I think Ecuador's situation is similar, so it's a bit of a mixture of financial, political and COVID, all sort of rolling up into one sort of storm.'
UK Supplier

Summing up: mapping a journey from fragility to resilience

The pandemic is an extraordinary period of socio-economic history. It has been marked by significant temporal and geographic patterns with major changes occurring at unprecedented speed. Therefore, the resilience of just about every field of human activity has been severely tested. Underpinning these patterns has been an ongoing sense of uncertainty. Future gazing has been difficult to say the least with apparent certainties flying out of the window in a matter of days. The same is very much true for flower supply chains. There have been very distinct phases during the pandemic to date which have produced differential impacts within different geographies. For an industry that relies upon planning well into the future, things have been extraordinarily difficult.

Overall, stakeholders at the market end of the supply chain ultimately seem to have performed well (albeit there has been much re-structuring within the industry) but the experience has been much more difficult for those at the production end of the supply chain. Workers have borne the brunt of the problems and still face uncertainties as vaccine rollouts are proving slow in most producer countries. Ultimately, problems at the supply end of chain become problems for the market, which requires appropriate quantities of suitable quality stems at specified times. If the production base is unstable then so is the market. Crises are inevitable as the ongoing visibility of the impacts of climate change makes apparent. In other words, we can say that the business case for responsibly sourced flowers is now crystal clear.

The extent of the vulnerability at sites of production has been noted during this project by all stakeholders and there have been productive discussions about ways of increasing the resilience of these supply chains in the future. Recommendations relating to the future of the industry are made in the next section of this report and also within the Fairtrade Foundation's policy publication.

This project has focused upon the issue of 'fairer supply chain practices' as these are rightly seen as underpinning resilience. There has been much interesting and productive discussion related to the 'Living Wage'. But there are many more dimensions to the notion of 'fairer supply chains'.
These incorporate: the design and implementation of financial contracts between different stakeholders in the supply chain, including timing of payments, cancellation or other changes in order volumes, notice given for orders; assurance and certification processes; communication around product quality; pricing which reflects sustainable production costs; CSR interventions; mutual support within wider industry forums and government lobbying. These different dimensions of 'fairness' and 'ethicality' need to be strongly promoted as good practice across the sector as a whole. Whilst the project's stakeholders are aware of these issues and to varying degrees are making laudable efforts to address them, many issues remain in the industry more broadly which ultimately undermine the resilience of all players across the sector. Therefore, efforts to address these issues through broad initiatives such as a Covenant for Responsible Business Conduct in Floriculture are to be welcomed.

Co-ordinated multi-stakeholder actions are required to address the challenges identified through this project. It is very difficult for individual firms (whether retailers, suppliers, producers) to act unilaterally in a cost-sensitive, competitive commercial environment. Retailers like to offer points of difference to their customers. This makes it difficult to establish uniform good practices for initiatives (such as a Living Wage) if a number of retailers were to act jointly. This is highly problematic for really shifting the dial on some ethical and sustainability issues.

Consumer education is a key issue. Some categories of consumer are becoming more informed about sustainability issues and increasingly making choices based on such criteria. Given the profound nature of the challenges confronting human societies it is vital that citizens do become better informed and active. The commercial sector has a critical role to play in both providing consumers with sustainable choices AND ensuring that people are aware of the impacts of the choices they are making.

Overall, this project has been hugely successful in documenting the impacts of the pandemic upon the flower industry. We have been able to capture people's perceptions and observations as the pandemic has unfolded. This has provided detailed insights into the issue of resilience within the flower industry. The collaborative working model has ensured dialogue and sense of shared purpose which has coalesced into a set of challenging but worthy and important recommendations which can not only set the flower industry on course for a more resilient and sustainable future but also offer lessons for other product lines and corporate strategies more widely.

Observations and recommendations

Below we present a list of summative observations and recommendations that are targeted at different stakeholders. These stakeholders include: retailers, buyers, different internal stakeholder groups within retailer and buying firms, suppliers, consumers, UK government; Kenyan government, industry bodies, worker's rights groups and researchers. Note that these observations and recommendations are reflected, where appropriate, in the policy document published by the Fairtrade Foundation (Taylor et al., 2021) as an output from this project.

- The pandemic has demonstrated the need for rapid, co-ordinated responses when crises occur. Therefore, all organisations need to ensure that crisis management plans are in place forthwith.
- Clearer definition of 'better supply chain practices' is required. What precise practices at different parts of the supply chain are being referred to? Pathways for influencing change in different practices need to be identified. The experience of the pandemic has highlighted the vulnerability of producers to retailer/buyer behaviours. For supply chains to be more resilient there is a need for clear contracts to be the norm, with orders and payment schedules being consistently applied, for example.
- Ongoing analysis of the share of value within supply chain analysis needs to be taken further and made more detailed. Taxes, export duties, levies etc need to be fully accounted for at each node of supply chain. Such a detailed understanding of how value is comprised will enable opportunities for more equitable distribution to be identified and implemented.
- Living wages gaps have been highlighted. These need to be addressed with due consideration given to the monetary value of support provided by growers such as transport, food and access to health care. The wider impacts of implementing a living wage need to be evaluated in order to develop realistic pilot projects.
- Assurance processes are important. There is a need to learn from the experiences of the last year. There are clear benefits from integrating worker voice technologies, these have brought to light issues that have perhaps not been so visible via traditional forms of audit. Remote audits bring efficiencies. But there is a need to re-focus on the best blend of techniques to ensure standards on site are being maintained and that issues are being dealt with meaningfully.
- There is a case for re-examining the effectiveness of different certifications and standards in improving worker welfare and environmental practices. The extent of impacts upon negative workers during the pandemic is indicative of their vulnerability and suggests a need for robustness of assurance schemes to be critically assessed.
- Crises result in greater pressures on worker rights. Women are especially vulnerable. These vulnerabilities need to be fully understood and more widely acknowledged so that effective mitigation strategies can be put in place.
- There is a need for improved consumer education about workers' rights and environmental issues in supply chains so that consumers can be empowered to make decisions about their purchases. Online sales have increased the potential for deeper engagement with consumers.
- There is need to take a holistic view of supply chains and the flower industry when implementing initiatives. A heavy focus on some products/production areas could lead to increased pressures for other products/areas. i.e. increased cost of roses to support payment of a living wage could lead to downward pressure on prices for other products in a bouquet.
- Communication within and between corporate departments is vital for making supply chains more resilient. Sustainability and ethical behaviour need to be embedded values within firms cross-organisationally, not just within CSR teams. It is vital that these values are embedded within buying teams and within senior levels of firms. This applies to all commercial actors in the supply chain.
- Multi-stakeholder working groups are important for ensuring dialogue, to identify needs, share ideas and experiences.
- There is a strong case for setting up of British equivalent of the Dutch Covenant for Responsible Business Conduct in Floriculture to encourage co-operation between stakeholders, common agenda, level playing field etc. This will enable the key underpinning issues identified through this project to be focused upon and for route-maps for change to be devised.
- The impacts of Brexit require ongoing attention as these reverberate along the supply chains and generate knock-on effects in supplier nations. Examples include labour shortages in the UK which increase production costs with implications for all stakeholders within supply chains.

The Final Word

One of the defining features of the Covid-19 pandemic, especially in the early lockdown months, has been the extent to which the realities of daily social and economic life have been rendered invisible. This has been abundantly true within the cut-flower industry as individuals and companies struggled to cope with disrupted supply chains and radically different daily opportunities and routines. This report, and the research underpinning it, plays a crucial role in capturing and recording what was going on during this extraordinary period of time. In other words, we have been able to render visible phenomena that were obscured by lockdowns. On the one hand we highlight the very real and fundamental struggles faced by farm owners, workers, retailers, florists et al. and on the other hand we draw out the many innovative adaptive responses that were initiated by a wide range of stakeholders. It is clear that many problems have been exacerbated by long term structural factors. For example, unequal value distribution in the supply chain which ultimately reinforces livelihood fragilities within areas of production. Identifying and evaluating such systemic issues is a core focus of our ongoing research into supply chain sustainability within Coventry University's Research Centre for Business in Society. Our role within this project has been to contribute objective, rigorous academic analysis founded upon robust empirical evidence. The multi-stakeholder approach of the overall project has been exemplary as it has brought together key interest groups who have collectively developed a progressive agenda for action which takes important first steps in recognising these fundamental structural issues.

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The Centre for Business in Society

Our research

The behaviours of organisations and policy makers impact on individuals, groups and communities, businesses and organisations, nations and global relations. These effects and consequences can be beneficial and enable enhanced social, economic and environmental well-being. However, negative consequences can also arise from business practices and policy makers paying insufficient attention to their corporate responsibilities or their impact on society. Our research aims to understand the role of business in society, to share these emerging insights and to seek a fairer outcome for all.

CBiS's team of researchers has long-established multiple industry and institutional collaborations on a global scale, sharing the benefits of impact-led research. We embrace research methods that are considerate and sensitive to the constantly changing business environment, behaviours, practices and society.

Our core funding stems from EU and government bodies, charities, research councils and local businesses. CBiS has a clearly defined focus within each research cluster as detailed in our Research Brochure.

Core themes

Our mission is to deliver effective solutions to policy makers, businesses and industries that reflect responsible practice. Through understanding the impact of organisations' activities, behaviours and policies, our research seeks to promote responsibility and to change behaviours so as to achieve better outcomes for economies and societies.

CBiS's research themes have now formed the basis of our four research teams which are centred around the following themes:

Sustainable Production and Consumption
Economic Development and Inclusive Economies
Sector, Economic and Financial Studies
Data, Organisations and Society

The Sustainable Production and Consumption Cluster

The Sustainable Production and Consumption Cluster is a research team focusing on the ultimate goals of living within environmental limits and the attainment of social justice, through the delivery of responsible business and ethical consumption practices.

Our research is aligned with the UN's Sustainable Development Goal 12: 'Ensure sustainable consumption and production patterns'. The cluster frames its research around a holistic approach to sustainability, whereby true sustainability requires the alignment of social, economic and environmental goals.

Our research takes a 'whole supply chain' approach, examining activities, attitudes and behaviours at different points in the life cycle of products.

Our projects cover areas such as waste reduction, resource and energy efficiency, sustainable community and consumer behaviours, ethical certifications and supply chain governance.

Our work is global in nature, reaching out in particular to South Africa, Indonesia and China. The interdisciplinary cluster team generates a dynamic environment for cutting-edge research.

The Sustainable Cut-flowers Project is a leading example of the work undertaken through the cluster. The project has a strong stakeholder group including retailers, florists, industry organisations, importers and NGOs. Our work has focused upon the sustainability impacts of the industry at different scales and include evaluations of standards and certifications. We are currently leading a project focusing on mechanisms for assuring wild harvested foliage. The wider project also reaches out into the broader horticulture space.

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