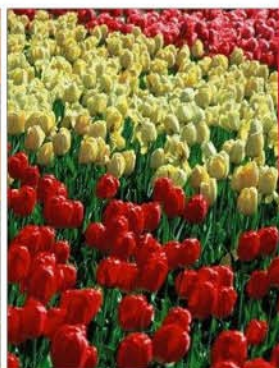


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# Statistical Overview of the Canadian Ornamental Industry 2020

Prepared by  
Crops and Horticulture Division  
Agriculture and Agri-Food Canada  
December 2021



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## Overview

The ornamental horticulture sector includes the floriculture (primarily cut flowers and potted plants), nursery, Christmas tree, and turf sod industries.

Disruptions caused by the COVID-19 pandemic presented a number of challenges for the ornamental horticulture sector in 2020, including closures of both plant production and retail businesses, varying and rapidly changing re-opening plans, increased costs to comply with measures to control the spread of COVID-19 among customers and workers, and general labour and specialist technician shortages resulting from restrictions on travel. When sales resumed in late spring in most of Canada, pent-up demand and a home-bound population drove sales upward by 6.4% from \$2.39 billion in 2019 to \$2.54 billion in 2020. Retailers adapted to pandemic restrictions by offering online shopping, curbside pick-up and home delivery, as well as physically distanced on-site sales.

Floriculture continues as the largest sub-sector accounting for 66.9% of total ornamental product sales (\$1.7 billion) in 2020. Nursery plant sales and resales reached \$727 million in 2020, accounting for 28.6% of total ornamental sales. Turf sod generated a further \$137 million in sales, contributing 6% of total ornamental production in 2020.

In 2020, United States purchases were valued \$658 million and accounted for 99.5% of total Canadian ornamental exports while United States supplies were valued \$284 million, accounting for 51.8% of total Canadian imports.



# 1. Production

Floriculture (flowering and non-flowering live potted plants, greenhouse and field-cut flowers) remained the largest ornamental sub-sector by revenue, accounting for 66.9% of total sales. The total value of floriculture sales have been increasing over the last decade and rose 7.0% from 2019 to \$1.7 billion in 2020, which is 15.9% above the 10-year average. About half of total floriculture sales in 2020 were in Ontario (49.4%), with 24% in British Columbia, 14% in Quebec and the remaining provinces accounting for 12.8%. Nursery product sales and resales were up 6.9% to \$727.0 million in 2020, accounting for 28.6% of total ornamental sales. By province, Ontario accounted for the largest share of total nursery sales (41.8%), followed by British Columbia (32.0%) and Quebec (14.5%).

While most floriculture production takes place within climate controlled greenhouses, most nursery production takes place outdoors. The 2016 Census of Agriculture showed both sub-sectors increasing in average farm size and decreasing in the number of operations, leading to fewer but larger and more productive operations. The most recent Census of Agriculture was conducted in May 2021 and the results will be released in 2022. The nursery industry is typically more vertically integrated than the floriculture industry with a combination of retail sales (garden centers), landscaping, installation, and maintenance services forming part of the income mix for many producers.

The total turf sod area decreased nationwide for the sixth consecutive year, down 2.4% to 18,215 hectares in 2020; while the total value of turf sod sales rose by 2.6% to \$137.5 million, accounting for 5.4% of total ornamental sales. Ontario led the country in turf sod sales (\$54 million) at 39.4% of the national total.



### 1.1. Number of Canadian ornamental farms<sup>1</sup> by sub-sector

|  | 2016         | 2017         | 2018         | 2019         | 2020         | 2020 % Share  |
|--|--------------|--------------|--------------|--------------|--------------|---------------|
| Nursery                                  | 2,242        | 2,278        | 2,209        | 2,127        | 2,056        | 50.0%         |
| Greenhouse, specialized flower producers | 1,811        | 1,703        | 1,646        | 1,620        | 1,617        | 39.4%         |
| Sod                                      | 240          | 246          | 244          | 248          | 251          | 6.1%          |
| Field-grown cut flowers                  | 121          | 178          | 197          | 172          | 185          | 4.5%          |
| <b>Total</b>                             | <b>4,414</b> | <b>4,405</b> | <b>4,296</b> | <b>4,167</b> | <b>4,109</b> | <b>100.0%</b> |

Note:

1. Number of farms of greenhouse indoor and outdoor potted plants, greenhouse bedding plants, greenhouse cuttings and tree seedlings, greenhouse stems and Christmas trees are not reported in this table.

Source: Statistics Canada. Tables 32-10-0029-01, 32-10-0019-01, 32-10-0034-01 and 32-10-0452-01

### 1.2. Area of Canadian ornamental farms<sup>1</sup> by sub-sector (hectares)

|  | 2016          | 2017          | 2018          | 2019          | 2020          | 2020 % Share  |
|--|---------------|---------------|---------------|---------------|---------------|---------------|
| Nursery                                  | 18,369        | 17,691        | 17,202        | 16,886        | 16,304        | 45.6%         |
| Greenhouse, specialized flower producers | 760           | 735           | 712           | 706           | 683           | 1.9%          |
| Sod                                      | 21,915        | 20,522        | 19,327        | 18,667        | 18,215        | 51.0%         |
| Field-grown cut flowers                  | 211           | 276           | 303           | 329           | 520           | 1.5%          |
| <b>Total</b>                             | <b>41,255</b> | <b>39,224</b> | <b>37,544</b> | <b>36,588</b> | <b>35,722</b> | <b>100.0%</b> |

Note:

1. Number of farms of greenhouse indoor and outdoor potted plants, greenhouse bedding plants, greenhouse cuttings and tree seedlings, greenhouse stems and Christmas trees are not reported in this table.

Source: Statistics Canada. Tables 32-10-0029-01, 32-10-0019-01, 32-10-0034-01 and 32-10-0452-01



### 1.3. Production of greenhouse flowers and plants by category (number in millions)

|                            | 2016           | 2017           | 2018           | 2019           | 2020         | 2020 % Share  |
|----------------------------|----------------|----------------|----------------|----------------|--------------|---------------|
| Bedding plants, ornamental | 469.58         | 457.46         | 441.26         | 415.81         | 415.41       | 42.3%         |
| Cut flowers                | 306.31         | 291.34         | 296.29         | 285.70         | 260.67       | 26.5%         |
| Potted plants <sup>1</sup> | 216.38         | 209.26         | 213.19         | 210.68         | 214.60       | 21.8%         |
| Cuttings                   | 89.74          | 87.91          | 84.61          | 94.20          | 92.26        | 9.4%          |
| <b>Total</b>               | <b>1,082.0</b> | <b>1,046.0</b> | <b>1,035.3</b> | <b>1,006.4</b> | <b>982.9</b> | <b>100.0%</b> |

Note:

1. Includes indoor potted plants and outdoor potted plants.

Source: Statistics Canada. Table 32-10-0246-01 Production and sale of greenhouse flowers and plants

### 1.4. Total area for production of specialized greenhouse flowers and plants by province (square metres)

|                    | 2016             | 2017             | 2018             | 2019             | 2020             | 2020 % Share  |
|--------------------|------------------|------------------|------------------|------------------|------------------|---------------|
| Atlantic provinces | 257,890          | 260,182          | 251,901          | 247,964          | 243,621          | 3.6%          |
| Quebec             | 1,213,584        | 1,181,037        | 1,178,262        | 1,239,323        | 1,097,002        | 16.1%         |
| Ontario            | 3,729,701        | 3,480,642        | 3,417,170        | 3,484,294        | 3,323,439        | 48.7%         |
| Prairie provinces  | 767,503          | 837,687          | 799,593          | 782,336          | 802,162          | 11.7%         |
| British Columbia   | 1,614,579        | 1,584,010        | 1,475,556        | 1,308,806        | 1,360,901        | 19.9%         |
| <b>Canada</b>      | <b>7,601,836</b> | <b>7,353,127</b> | <b>7,122,483</b> | <b>7,062,723</b> | <b>6,827,125</b> | <b>100.0%</b> |

Source: Statistics Canada. Table 32-10-0019-01 Estimates of specialized greenhouse operations, greenhouse area, and months of operation





### 1.5. Total field-grown flowers area by province (hectares)

|                           | 2016       | 2017       | 2018       | 2019       | 2020       | 2020 % Share  |
|---------------------------|------------|------------|------------|------------|------------|---------------|
| Quebec                    | x          | 4          | 8          | 13         | 43         | 8.3%          |
| Ontario                   | 38         | 98         | 117        | 108        | 125        | 24.0%         |
| Alberta                   | 4          | x          | x          | x          | x          | n/a           |
| British Columbia          | 166        | 164        | 168        | 192        | 338        | 65.0%         |
| <b>Canada<sup>1</sup></b> | <b>211</b> | <b>276</b> | <b>303</b> | <b>329</b> | <b>520</b> | <b>100.0%</b> |

Notes:

1. Totals may not add up as some data was suppressed to meet confidentiality requirements of the *Statistics Act*.

x: Suppressed to meet the confidentiality requirements of the *Statistics Act*.

n/a: Not applicable.

Source: Statistics Canada. Table 32-10-0452-01 Estimates of field-grown cut flowers area, production and sales



## 1.6. Production of potted plants by variety (number in thousands)

|  | 2016           | 2017           | 2018           | 2019           | 2020           | 2020 % Share  |
|--|----------------|----------------|----------------|----------------|----------------|---------------|
| Tropical foliage and green plants        | 11,425         | 15,557         | 15,279         | 17,310         | 18,887         | 8.8%          |
| Geraniums, outdoor                       | 16,472         | 15,633         | 15,726         | 13,890         | 12,610         | 5.9%          |
| Herbaceous flowering perennials, outdoor | 8,130          | 7,960          | 9,529          | 11,806         | 12,421         | 5.8%          |
| Vegetable plants, outdoor                | 7,227          | 9,714          | 9,708          | 9,580          | 11,734         | 5.5%          |
| Outdoor hanging pots                     | 12,896         | 11,433         | 11,689         | 12,004         | 10,722         | 5.0%          |
| Fine herb plants, outdoor                | 10,698         | 12,561         | 12,324         | 10,076         | 9,052          | 4.2%          |
| Miniature roses, indoor                  | 10,318         | 10,214         | 9,555          | 8,968          | 8,531          | 4.0%          |
| Kalanchoes, indoor                       | 8,024          | 7,178          | 9,072          | 9,331          | 8,367          | 3.9%          |
| Begonias, outdoor                        | 6,708          | 6,135          | 6,099          | 5,357          | 5,459          | 2.5%          |
| Petunias, outdoor                        | 6,923          | 6,878          | 5,592          | 5,182          | 5,070          | 2.4%          |
| Chrysanthemums, indoor                   | 6,335          | 6,037          | 6,806          | 6,329          | 4,936          | 2.3%          |
| Poinsettias, indoor                      | 6,451          | 5,690          | 5,899          | 4,741          | 4,740          | 2.2%          |
| Orchids, indoor                          | 2,115          | 3,036          | 3,170          | 3,020          | 4,474          | 2.1%          |
| African violets, indoor                  | 7,278          | 3,833          | 4,377          | 4,296          | 4,006          | 1.9%          |
| Hawker's balsams, outdoor                | 3,889          | 3,977          | 4,067          | 3,551          | 3,629          | 1.7%          |
| Gerberas, indoor                         | 4,230          | 4,171          | 4,345          | 3,422          | 3,377          | 1.6%          |
| Chrysanthemums, outdoor                  | 3,630          | 3,660          | 2,969          | 2,622          | 2,745          | 1.3%          |
| Lilies, indoor                           | 3,495          | 2,811          | 3,121          | 2,783          | 2,552          | 1.2%          |
| Calibrachos, outdoor                     | 2,624          | 2,373          | 2,310          | 2,440          | 2,400          | 1.1%          |
| Cyclamens, indoor                        | 1,925          | 1,719          | 1,843          | 1,646          | 2,236          | 1.0%          |
| Indoor hanging pots                      | 1,275          | 940            | 1,212          | 1,313          | 2,173          | 1.0%          |
| Primulas, indoor                         | 3,078          | 2,291          | 1,960          | 2,027          | 1,645          | 0.8%          |
| Tulips, indoor                           | 2,090          | 2,158          | 2,216          | 2,381          | 1,616          | 0.8%          |
| Pansies, outdoor                         | 1,456          | 1,619          | 1,680          | 1,620          | 1,346          | 0.6%          |
| Dahlia, outdoor                          | 983            | 974            | 918            | 915            | 891            | 0.4%          |
| Verbenas, outdoor                        | 821            | 1,130          | 845            | 907            | 885            | 0.4%          |
| Azaleas, indoor                          | 930            | 611            | 656            | 494            | 466            | 0.2%          |
| Rudbeckias, outdoor                      | 147            | 190            | 180            | 308            | 356            | 0.2%          |
| Zinnias, outdoor                         | 345            | 305            | 254            | 278            | 280            | 0.1%          |
| Argyranthemum, outdoor                   | 299            | 319            | 251            | 236            | 238            | 0.1%          |
| Heliopsis, outdoor                       | 67             | 42             | 48             | 71             | 72             | 0.0%          |
| Other indoor pots                        | 15,597         | 13,241         | 14,081         | 15,663         | 15,575         | 7.3%          |
| Other outdoor pots                       | 48,503         | 44,872         | 45,407         | 46,107         | 51,108         | 23.8%         |
| <b>Total potted plants</b>               | <b>216,382</b> | <b>209,260</b> | <b>213,187</b> | <b>210,676</b> | <b>214,602</b> | <b>100.0%</b> |

Source: Statistics Canada. Table 32-10-0021-01 Production of plants, flowers and tree seedlings



### 1.7. Production of cuttings by variety (number in thousands)

|                          | 2016          | 2017          | 2018          | 2019          | 2020          | 2020 % Share  |
|--------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Geraniums, cuttings      | 14,095        | 12,318        | 11,316        | 11,995        | 11,842        | 12.8%         |
| Poinsettias, cuttings    | 5,424         | 5,159         | 5,046         | 5,435         | 5,404         | 5.9%          |
| Impatiens, cuttings      | 4,809         | 4,153         | 3,821         | 4,229         | 3,943         | 4.3%          |
| Chrysanthemums, cuttings | 3,897         | 4,115         | 4,001         | 4,117         | 3,854         | 4.2%          |
| Other cuttings           | 61,519        | 62,164        | 60,429        | 68,426        | 67,222        | 72.9%         |
| <b>Total cuttings</b>    | <b>89,744</b> | <b>87,910</b> | <b>84,614</b> | <b>94,202</b> | <b>92,265</b> | <b>100.0%</b> |

Source: Statistics Canada. Table 32-10-0021-01 Production of plants, flowers and tree seedlings

### 1.8. Production of cut flowers<sup>1</sup> by variety (number in thousands)

|                          | 2016           | 2017           | 2018           | 2019           | 2020           | 2020 % Share  |
|--------------------------|----------------|----------------|----------------|----------------|----------------|---------------|
| Tulips, stems            | 111,177        | 119,132        | 124,903        | 120,896        | 96,763         | 37.1%         |
| Gerberas, stems          | 87,778         | 81,079         | 80,295         | 69,183         | 73,165         | 28.1%         |
| Chrysanthemums, stems    | 25,377         | 23,142         | 21,769         | 20,654         | 23,270         | 8.9%          |
| Snapdragons, stems       | 23,772         | 18,864         | 20,725         | 22,360         | 19,986         | 7.7%          |
| Lilies, stems            | 11,557         | 9,999          | 12,113         | 11,525         | 10,074         | 3.9%          |
| Lisianthus, stems        | 5,793          | 5,440          | 4,016          | 6,208          | 8,034          | 3.1%          |
| Alstroemerias, stems     | 8,964          | 7,491          | 5,754          | 3,665          | 3,710          | 1.4%          |
| Freesias, stems          | 5,821          | 5,979          | 4,745          | 3,732          | 2,856          | 1.1%          |
| Roses, stems             | x              | 4,417          | 3,557          | 3,831          | 2,770          | 1.1%          |
| Irises, stems            | x              | 1,834          | 2,033          | 1,649          | 214            | 0.1%          |
| Daffodils, stems         | 3,746          | 2,623          | 2,759          | 1,387          | 30             | 0.0%          |
| Other cut flowers        | 16,485         | 11,341         | 13,618         | 20,611         | 19,794         | 7.6%          |
| <b>Total cut flowers</b> | <b>306,315</b> | <b>291,342</b> | <b>296,285</b> | <b>285,703</b> | <b>260,666</b> | <b>100.0%</b> |

Notes:

1. Includes flowers grown, or given some cultural treatment, and sold.

x: Suppressed to meet the confidentiality requirements of the *Statistics Act*.

Source: Statistics Canada. Table 32-10-0021-01 Production of plants, flowers and tree seedlings



### 1.9. Field-grown nursery tree and plant production by variety (number in thousands)

|                                | 2016          | 2017          | 2018          | 2019          | 2020          | 2020 % Share  |
|--------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Small fruit bushes             | 49,859        | 50,368        | 50,007        | 44,415        | 47,554        | 71.4%         |
| Perennials and annuals         | 5,898         | 3,703         | 3,702         | 4,020         | 4,792         | 7.2%          |
| Tree seedlings <sup>1</sup>    | 8,198         | 6,026         | 4,370         | 4,080         | 3,399         | 5.1%          |
| Conifer trees                  | 2,064         | 1,905         | 2,032         | 2,715         | 2,525         | 3.8%          |
| Vines                          | x             | 1,516         | 1,127         | 1,440         | 2,280         | 3.4%          |
| Shade and ornamental trees     | 1,665         | 1,571         | 1,317         | 1,621         | 1,815         | 2.7%          |
| Deciduous shrubs               | 1,369         | 1,616         | 1,731         | 1,403         | 1,374         | 2.1%          |
| Fruit trees                    | 1,442         | 1,604         | 1,328         | 1,424         | 1,301         | 2.0%          |
| Evergreen and broadleaf shrubs | 895           | 573           | 285           | 341           | 558           | 0.8%          |
| Evergreen and conifer shrubs   | x             | 764           | 509           | 496           | 529           | 0.8%          |
| Other trees and plants         | 6,904         | 130           | 168           | 1,366         | 474           | 0.7%          |
| <b>Total</b>                   | <b>78,294</b> | <b>69,777</b> | <b>66,576</b> | <b>63,320</b> | <b>66,599</b> | <b>100.0%</b> |

Notes:

1. Operations which exclusively produce tree seedlings for reforestation are out of scope since the 2016 survey. Prior surveys have included their production, affecting also nursery area, production, sales, labour and expenses variables.

x: Suppressed to meet the confidentiality requirements of the *Statistics Act*.

Source: Statistics Canada. Table 32-10-0031-01 Nursery tree and plant production

### 1.10. Container-grown nursery tree and plant production by variety (number in thousands)

|                                | 2016          | 2017          | 2018          | 2019          | 2020          | 2020 % Share  |
|--------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Perennials and annuals         | 16,668        | 15,975        | 15,413        | 13,142        | 14,889        | 32.6%         |
| Deciduous shrubs               | 8,444         | 9,984         | 9,037         | 8,872         | 9,198         | 20.1%         |
| Evergreen and conifer shrubs   | 3,758         | 4,547         | 6,043         | 5,209         | 5,754         | 12.6%         |
| Evergreen and broadleaf shrubs | 3,182         | 3,295         | 2,880         | 3,325         | 3,371         | 7.4%          |
| Small fruit bushes             | 3,581         | 3,441         | 3,111         | 3,232         | 3,325         | 7.3%          |
| Conifer trees                  | 1,535         | 2,685         | 998           | 1,560         | 2,581         | 5.6%          |
| Tree seedlings <sup>1</sup>    | 6,363         | 2,994         | 1,458         | 1,749         | 1,758         | 3.8%          |
| Shade and ornamental trees     | 1,156         | 1,196         | 1,093         | 1,160         | 987           | 2.2%          |
| Vines                          | 800           | 769           | 391           | 377           | 423           | 0.9%          |
| Fruit trees                    | 277           | 210           | 159           | 352           | 305           | 0.7%          |
| Other trees and plants         | 1,474         | 2,249         | 858           | 1,800         | 3,089         | 6.8%          |
| <b>Total</b>                   | <b>47,239</b> | <b>47,345</b> | <b>41,442</b> | <b>40,778</b> | <b>45,680</b> | <b>100.0%</b> |

Note:

1. Operations which exclusively produce tree seedlings for reforestation are out of scope since the 2016 survey. Prior surveys have included their production, affecting also nursery area, production, sales, labour and expenses variables.

Source: Statistics Canada. Table 32-10-0031-01 Nursery tree and plant production



### 1.11. Total sod area by province (hectares)

|                           | 2016          | 2017          | 2018          | 2019          | 2020          | 2020 % Share  |
|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Newfoundland and Labrador | x             | x             | 254           | 247           | 214           | 1.2%          |
| Prince Edward Island      | x             | x             | 70            | 69            | 68            | 0.4%          |
| Nova Scotia               | 999           | 975           | 965           | 922           | 989           | 5.4%          |
| New Brunswick             | 401           | 467           | 253           | 249           | 238           | 1.3%          |
| Quebec                    | 4,821         | 4,237         | 4,035         | 4,165         | 4,212         | 23.1%         |
| Ontario                   | 9,105         | 8,624         | 7,927         | 7,364         | 7,139         | 39.2%         |
| Manitoba                  | 780           | 749           | 786           | 911           | 789           | 4.3%          |
| Saskatchewan              | 613           | 564           | 622           | 614           | 578           | 3.2%          |
| Alberta                   | 4,065         | 3,714         | 3,589         | 3,312         | 3,214         | 17.6%         |
| British Columbia          | 811           | 859           | 827           | 816           | 773           | 4.2%          |
| <b>Canada</b>             | <b>21,915</b> | <b>20,522</b> | <b>19,327</b> | <b>18,667</b> | <b>18,215</b> | <b>100.0%</b> |

Note:

x: Suppressed to meet the confidentiality requirements of the *Statistics Act*.

Source: Statistics Canada. Table 32-10-0034-01 Estimates of sod area, sales and resales

### 1.12. Sod operations<sup>1</sup> by province (number)

|                           | 2016       | 2017       | 2018       | 2019       | 2020       | 2020 % Share  |
|---------------------------|------------|------------|------------|------------|------------|---------------|
| Newfoundland and Labrador | 20         | 23         | 21         | 21         | 21         | 8.4%          |
| Prince Edward Island      | x          | 4          | 3          | 3          | 3          | 1.2%          |
| Nova Scotia               | 9          | 10         | 11         | 11         | 12         | 4.8%          |
| New Brunswick             | x          | 9          | 10         | 10         | 10         | 4.0%          |
| Quebec                    | 60         | 61         | 58         | 57         | 57         | 22.7%         |
| Ontario                   | 65         | 65         | 65         | 65         | 68         | 27.1%         |
| Manitoba                  | 10         | 10         | 11         | 12         | 11         | 4.4%          |
| Saskatchewan              | 9          | 8          | 9          | 13         | 13         | 5.2%          |
| Alberta                   | 26         | 26         | 26         | 26         | 26         | 10.4%         |
| British Columbia          | 30         | 30         | 30         | 30         | 30         | 12.0%         |
| <b>Canada</b>             | <b>240</b> | <b>246</b> | <b>244</b> | <b>248</b> | <b>251</b> | <b>100.0%</b> |

Notes:

1. Firms that only distribute sod or nursery stock, or just landscape and lay sod are excluded.

x: Suppressed to meet the confidentiality requirements of the *Statistics Act*.

Source: Statistics Canada. Table 32-10-0034-01 Estimates of sod area, sales and resales



### 1.13. Christmas tree production<sup>1</sup> by province (number of farms)

|                           | 2011         | 2016         | 2016 % Share  |
|---------------------------|--------------|--------------|---------------|
| Newfoundland and Labrador | 19           | 11           | 0.6%          |
| Prince Edward Island      | 20           | 18           | 1.0%          |
| Nova Scotia               | 447          | 319          | 17.0%         |
| New Brunswick             | 157          | 97           | 5.2%          |
| Quebec                    | 379          | 343          | 18.3%         |
| Ontario                   | 647          | 530          | 28.3%         |
| Manitoba                  | 60           | 39           | 2.1%          |
| Saskatchewan              | 41           | 31           | 1.7%          |
| Alberta                   | 105          | 83           | 4.4%          |
| British Columbia          | 506          | 401          | 21.4%         |
| <b>Canada</b>             | <b>2,381</b> | <b>1,872</b> | <b>100.0%</b> |

Note:

1. The most recent Census of Agriculture was conducted in May 2021 and the results will be released in 2022.

Source: Statistics Canada, Census of Agriculture. Table 32-10-0421-01 Christmas trees

### 1.14. Christmas tree production<sup>1</sup> by province (hectares)

|                           | 2011          | 2016          | 2016 % Share  |
|---------------------------|---------------|---------------|---------------|
| Newfoundland and Labrador | 116           | 71            | 0.3%          |
| Prince Edward Island      | 140           | 134           | 0.6%          |
| Nova Scotia               | 7,663         | 6,179         | 26.0%         |
| New Brunswick             | 2,131         | 1,785         | 7.5%          |
| Quebec                    | 8,347         | 8,255         | 34.7%         |
| Ontario                   | 5,955         | 4,456         | 18.7%         |
| Manitoba                  | 472           | 178           | 0.7%          |
| Saskatchewan              | 305           | 265           | 1.1%          |
| Alberta                   | 565           | 449           | 1.9%          |
| British Columbia          | 2,621         | 2,016         | 8.5%          |
| <b>Canada</b>             | <b>28,315</b> | <b>23,787</b> | <b>100.0%</b> |

Note:

1. The most recent Census of Agriculture was conducted in May 2021 and the results will be released in 2022.

Source: Statistics Canada, Census of Agriculture. Table 32-10-0421-01 Christmas trees



## 2. Sales and resales

As live plants, the products of the industry are highly perishable; therefore production and sales are closely linked. Restrictions on movement and travel caused by the COVID-19 pandemic kept Canadians at home and drove increased spending on ornamental products for the home and garden. Taken together, total annual sales were up 9.5% (to \$2.5 billion) in 2020 compared to the previous year. Bedding plants, which include vegetable and other edible plants for home use, saw the greatest annual increase in sales rising 12% from 2019. Cut flowers was the only product category to decrease, year over year, in 2020 and only by 0.5% to \$132.8 million. Nursery stock, mostly woody plants to be replanted outdoors for growing after sales, rose 7% to \$727 million.

### 2.1. Ornamental sales and resales by sub-sector (millions of Canadian dollars)

|                              | 2016           | 2017           | 2018           | 2019           | 2020           | 2020 % Share  |
|------------------------------|----------------|----------------|----------------|----------------|----------------|---------------|
| Greenhouse flower and plants | 1,510.2        | 1,503.9        | 1,555.7        | 1,575.4        | 1,677.5        | 66.0%         |
| Nursery <sup>1</sup>         | 670.5          | 659.5          | 660.8          | 679.8          | 727.0          | 28.6%         |
| Sod                          | 146.8          | 147.3          | 139.8          | 134.1          | 137.5          | 5.4%          |
| Field-grown cut flowers      | 13.2           | 17.0           | 18.6           | 14.9           | 24.3           | 1.0%          |
| <b>Total</b>                 | <b>2,327.4</b> | <b>2,310.7</b> | <b>2,356.2</b> | <b>2,389.3</b> | <b>2,542.0</b> | <b>100.0%</b> |

Note:

1. Operations which exclusively produce tree seedlings for reforestation are outside the scope of the 2016 survey. Prior surveys have included their production, affecting also nursery area, production, sales, labour and expenses variables.

Source: Statistics Canada. Tables 32-10-0023-01, 32-10-0032-01, 32-10-0034-01 and 32-10-0452-01

### 2.2. Greenhouse flower and plant sales<sup>1</sup> by category (millions of Canadian dollars)

|                              | 2016           | 2017           | 2018           | 2019           | 2020           | 2020 % Share  |
|------------------------------|----------------|----------------|----------------|----------------|----------------|---------------|
| Potted plants <sup>2,3</sup> | 811.6          | 789.7          | 834.2          | 853.0          | 885.6          | 67.9%         |
| Bedding plants, ornamental   | 192.2          | 204.2          | 204.8          | 207.5          | 232.7          | 17.8%         |
| Cut flowers                  | 140.1          | 127.8          | 133.2          | 133.5          | 132.8          | 10.2%         |
| Cuttings <sup>3</sup>        | 44.2           | 44.8           | 44.2           | 51.1           | 53.6           | 4.1%          |
| <b>Total</b>                 | <b>1,188.0</b> | <b>1,166.5</b> | <b>1,216.4</b> | <b>1,245.2</b> | <b>1,304.6</b> | <b>100.0%</b> |

Notes:

1. Farm gate value (before sales tax).

2. Includes indoor potted plants and outdoor potted plants.

3. Includes mixed operations (vegetables, flowers and plants), excluding cannabis operations.

Source: Statistics Canada. Table 32-10-0246-01 Production and sale of greenhouse flowers and plants



### 2.3. Greenhouse flower and plant sales and resales by province (millions of Canadian dollars)

|                           | 2016           | 2017           | 2018           | 2019           | 2020           | 2020 % Share  |
|---------------------------|----------------|----------------|----------------|----------------|----------------|---------------|
| Newfoundland and Labrador | x              | 8.7            | 8.6            | 8.2            | 7.7            | 0.5%          |
| Prince Edward Island      | x              | 5.5            | 5.5            | 6.2            | 8.2            | 0.5%          |
| Nova Scotia               | 17.0           | 13.0           | 12.7           | 13.5           | 14.9           | 0.9%          |
| New Brunswick             | x              | 44.3           | 45.2           | 46.3           | 49.3           | 2.9%          |
| Quebec                    | 177.0          | 192.6          | 212.2          | 215.2          | 243.6          | 14.5%         |
| Ontario                   | 790.5          | 774.9          | 805.0          | 817.6          | 831.7          | 49.6%         |
| Manitoba                  | 33.6           | 33.4           | 35.4           | 35.9           | 38.7           | 2.3%          |
| Saskatchewan              | 13.2           | 10.9           | 12.1           | 13.5           | 15.9           | 0.9%          |
| Alberta                   | 77.3           | 76.9           | 79.9           | 76.4           | 80.7           | 4.8%          |
| British Columbia          | 343.8          | 343.9          | 339.0          | 342.7          | 387.0          | 23.1%         |
| <b>Canada</b>             | <b>1,510.2</b> | <b>1,503.9</b> | <b>1,555.7</b> | <b>1,575.4</b> | <b>1,677.5</b> | <b>100.0%</b> |

Note:

x: Suppressed to meet the confidentiality requirements of the *Statistics Act*.

Source: Statistics Canada. Table 32-10-0023-01 Total value of greenhouse products

### 2.4. Field-grown cut flower sales by province (thousands of Canadian dollars)

|                           | 2016            | 2017            | 2018            | 2019            | 2020            | 2020 % Share  |
|---------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|---------------|
| Nova Scotia               | 0.0             | x               | x               | 0.0             | 79.1            | 0.3%          |
| Quebec                    | x               | 73.9            | 164.6           | 285.3           | 757.0           | 3.1%          |
| Ontario                   | 3,019.8         | 5,755.5         | 8,012.5         | 5,771.0         | 8,837.9         | 36.4%         |
| Saskatchewan              | 0.0             | x               | x               | 41.8            | 38.2            | 0.2%          |
| Alberta                   | x               | x               | x               | 212.0           | 66.7            | 0.3%          |
| British Columbia          | 10,009.9        | 10,825.8        | 10,003.3        | 8,557.4         | 14,437.9        | 59.5%         |
| <b>Canada<sup>1</sup></b> | <b>13,192.2</b> | <b>17,007.4</b> | <b>18,611.1</b> | <b>14,875.7</b> | <b>24,252.1</b> | <b>100.0%</b> |

Notes:

1. Totals may not add up as some data was suppressed to meet confidentiality requirements of the *Statistics Act*.

x: Suppressed to meet the confidentiality requirements of the *Statistics Act*.

Source: Statistics Canada. Table 32-10-0452-01 Estimates of field-grown cut flowers area, production and sales





## 2.5. Nursery stock<sup>1,2</sup> sales and resales by province (millions of Canadian dollars)

|                           | 2016         | 2017         | 2018         | 2019         | 2020         | 2020 % Share  |
|---------------------------|--------------|--------------|--------------|--------------|--------------|---------------|
| Newfoundland and Labrador | x            | x            | 0.7          | 0.6          | 0.6          | 0.1%          |
| Prince Edward Island      | x            | x            | 1.0          | 1.2          | 2.1          | 0.3%          |
| Nova Scotia               | 10.6         | 10.5         | 10.8         | 11.1         | 13.0         | 1.8%          |
| New Brunswick             | 3.5          | 3.2          | 3.3          | 3.0          | 3.2          | 0.4%          |
| Quebec                    | 89.4         | 87.7         | 86.3         | 90.5         | 105.8        | 14.5%         |
| Ontario                   | 303.6        | 290.4        | 276.9        | 279.0        | 303.6        | 41.8%         |
| Manitoba                  | 15.2         | 14.4         | 15.5         | 14.5         | 15.7         | 2.2%          |
| Saskatchewan              | 5.1          | 6.2          | 5.2          | 4.9          | 4.8          | 0.7%          |
| Alberta                   | 47.0         | 47.2         | 48.4         | 46.7         | 45.3         | 6.2%          |
| British Columbia          | 194.3        | 198.1        | 212.6        | 228.4        | 232.9        | 32.0%         |
| <b>Canada<sup>1</sup></b> | <b>670.5</b> | <b>659.5</b> | <b>660.8</b> | <b>679.8</b> | <b>727.0</b> | <b>100.0%</b> |

Notes:

1. Operations which exclusively produce tree seedlings for reforestation are outside the scope of the 2016 survey. Prior surveys have included their production, affecting also nursery area, production, sales, labour and expenses variables.

2. The term "nursery stock" covers a diverse range of non-edible, living plant material grown in field or in containers and sold with its root system intact. Nursery stock includes annual and perennial plants ranging from woody plants (e.g. trees, shrubs and rose bushes) to bedding plants and potted outdoor flowers. "Nursery stock" excludes Christmas trees and various inputs such as growing medium (e.g. peat moss and top soil), fertilizer and pesticides.

x: Suppressed to meet the confidentiality requirements of the *Statistics Act*.

Source: Statistics Canada. Table 32-10-0032-01 Nursery stock sales and resales

## 2.6. Sod sales and resales by province (millions of Canadian dollars)

|                           | 2016         | 2017         | 2018         | 2019         | 2020         | 2020 % Share  |
|---------------------------|--------------|--------------|--------------|--------------|--------------|---------------|
| Newfoundland and Labrador | 2.5          | x            | 2.7          | 2.5          | 2.2          | 1.6%          |
| Prince Edward Island      | x            | x            | 0.6          | 0.7          | 0.7          | 0.5%          |
| Nova Scotia               | 3.5          | 4.1          | 3.9          | 4.8          | 5.6          | 4.1%          |
| New Brunswick             | x            | 3.0          | 2.1          | 2.1          | 2.0          | 1.5%          |
| Quebec                    | 31.8         | 29.7         | 29.3         | 27.4         | 30.6         | 22.2%         |
| Ontario                   | 56.9         | 59.1         | 54.5         | 53.0         | 54.2         | 39.4%         |
| Manitoba                  | 4.6          | 4.3          | 4.1          | 4.5          | 4.3          | 3.1%          |
| Saskatchewan              | 4.4          | 3.9          | 4.3          | 4.2          | 4.1          | 3.0%          |
| Alberta                   | 28.6         | 27.8         | 26.6         | 23.8         | 22.6         | 16.5%         |
| British Columbia          | 11.4         | 12.0         | 11.5         | 11.1         | 11.2         | 8.2%          |
| <b>Canada</b>             | <b>146.8</b> | <b>147.3</b> | <b>139.8</b> | <b>134.1</b> | <b>137.5</b> | <b>100.0%</b> |

Notes:

1. Totals may not add up as some data was suppressed to meet confidentiality requirements.

x: Suppressed to meet the confidentiality requirements of the *Statistics Act*.

Source: Statistics Canada. Table 32-10-0034-01 Estimates of sod area, sales and resales



## 3. Trade

Canada's largest ornamental trading partner is the United States, accounting for 99.5% of exports by value and 51.8% of imports in the sector. Canadian exports rose in value by 5.4% from 2019 to \$661.3 million in 2020, while imports decreased 3.4% year-over-year to \$548.0 million in 2020. Imports to Canada include many plant inputs and soilless finished products from a range of countries including bulbs, cuttings, and cut flowers. Canada exports many live plants with soil to the U.S. including turf sod, potted plants and bedding plants to markets accessible by truck when considering the perishable nature of the goods. Most other countries cannot sell plants with soil to the U.S. for phytosanitary reasons.

### 3.1. Canadian ornamental trade balance by category (thousands of Canadian dollars)

|  |                              | 2016           | 2017           | 2018           | 2019           | 2020           |
|--|------------------------------|----------------|----------------|----------------|----------------|----------------|
| <b>Bulbs, tubers, tuberous roots, etc.</b>                                   | Exports                      | 22,195         | 22,050         | 21,959         | 27,233         | 19,716         |
|  | Imports                      | 54,525         | 53,370         | 55,900         | 51,945         | 53,329         |
|  | <b>Trade balance</b>         | <b>-32,329</b> | <b>-31,320</b> | <b>-33,942</b> | <b>-24,712</b> | <b>-33,613</b> |
| <b>Other live plants, including their roots, cuttings and slips, etc.</b>    | Exports                      | 321,483        | 339,499        | 363,535        | 418,875        | 464,964        |
|  | Imports                      | 241,080        | 262,371        | 275,824        | 300,006        | 310,880        |
|  | <b>Trade balance</b>         | <b>80,403</b>  | <b>77,128</b>  | <b>87,711</b>  | <b>118,870</b> | <b>154,084</b> |
| <b>Cut flowers and flower buds for bouquets or ornamental purposes, etc.</b> | Exports                      | 75,413         | 76,140         | 79,866         | 85,176         | 78,333         |
|  | Imports                      | 165,028        | 172,869        | 170,317        | 167,779        | 137,852        |
|  | <b>Trade balance</b>         | <b>-89,615</b> | <b>-96,729</b> | <b>-90,452</b> | <b>-82,603</b> | <b>-59,519</b> |
| <b>Foliage, branches and other parts of plants, etc.<sup>1</sup></b>         | Exports                      | 57,945         | 63,034         | 77,155         | 96,291         | 98,288         |
|  | Imports                      | 37,766         | 42,464         | 45,207         | 47,637         | 45,960         |
|  | <b>Trade balance</b>         | <b>20,179</b>  | <b>20,570</b>  | <b>31,948</b>  | <b>48,654</b>  | <b>52,328</b>  |
| <b>Total</b>   | Exports                      | 477,037        | 500,722        | 542,514        | 627,575        | 661,301        |
|  | Imports                      | 498,399        | 531,074        | 547,248        | 567,367        | 548,021        |
|  | <b>Overall trade balance</b> | <b>-21,362</b> | <b>-30,351</b> | <b>-4,734</b>  | <b>60,208</b>  | <b>113,280</b> |

Note:

1. Includes Christmas trees.

Source: Statistics Canada (CATSNet, July 2021)



## 3.2. Exports

### 3.2.1. Canadian floriculture and nursery exports<sup>1</sup> by province (thousands of Canadian dollars)

|                           | 2016           | 2017           | 2018           | 2019           | 2020           | 2020 % Share  |
|---------------------------|----------------|----------------|----------------|----------------|----------------|---------------|
| Newfoundland and Labrador | 0              | 1              | 7              | 0              | 6              | 0.0%          |
| Prince Edward Island      | 3,667          | 3,776          | 4,318          | 4,672          | 5,374          | 0.8%          |
| Nova Scotia               | 18,387         | 18,645         | 17,669         | 20,551         | 21,667         | 3.3%          |
| New Brunswick             | 31,614         | 30,331         | 34,374         | 36,419         | 37,217         | 5.6%          |
| Quebec                    | 39,640         | 44,837         | 54,285         | 75,857         | 77,568         | 11.7%         |
| Ontario                   | 275,071        | 289,460        | 312,421        | 349,521        | 361,457        | 54.7%         |
| Manitoba                  | 1,361          | 1,274          | 1,305          | 1,500          | 293            | 0.0%          |
| Saskatchewan              | 62             | 134            | 92             | 113            | 146            | 0.0%          |
| Alberta                   | 328            | 163            | 219            | 190            | 88             | 0.0%          |
| British Columbia          | 106,907        | 112,102        | 117,823        | 138,753        | 157,484        | 23.8%         |
| <b>Canada<sup>2</sup></b> | <b>477,037</b> | <b>500,722</b> | <b>542,514</b> | <b>627,575</b> | <b>661,301</b> | <b>100.0%</b> |

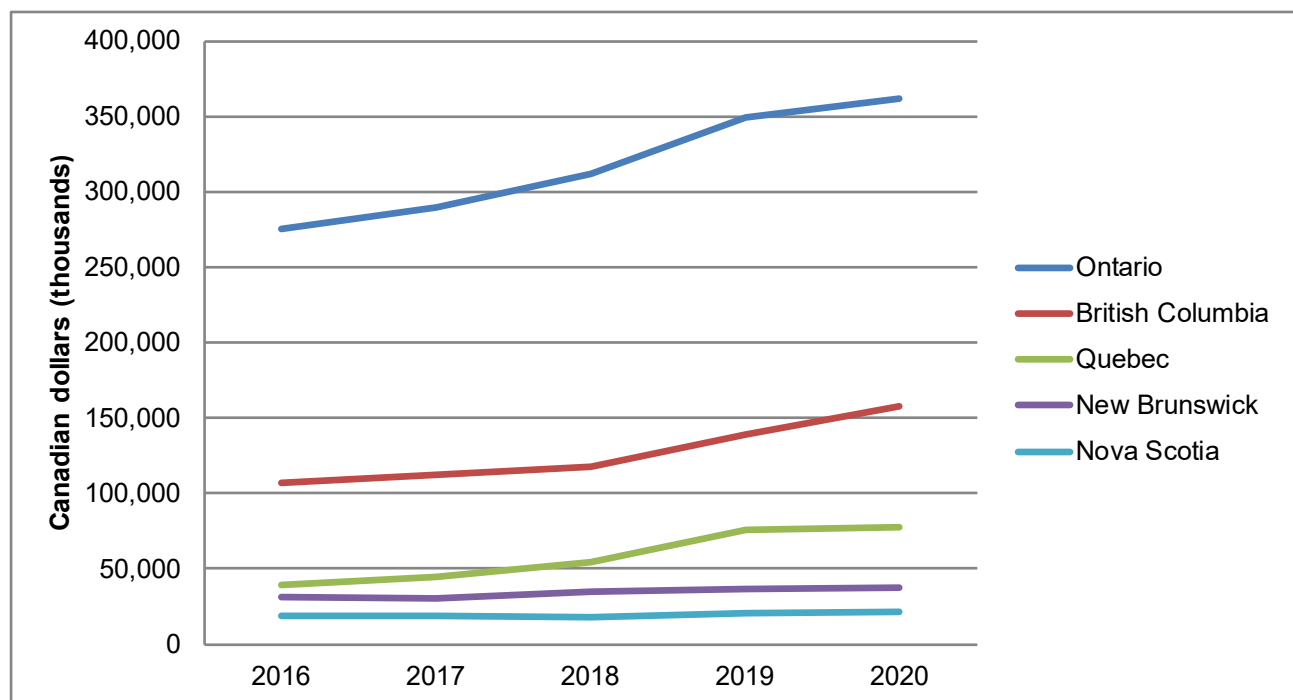
Notes:

1. Includes Christmas trees.

2. Canada total derived from the sum of available provincial data.

Source: Statistics Canada (CATSNet, July 2021)

### 3.2.2. Floriculture and nursery exports by province, 2016–2020



Source: Statistics Canada (CATSNet, July 2021)



### 3.2.3. Canada's top ten floriculture and nursery<sup>1</sup> export destinations (thousands of Canadian dollars)

|                           | 2016           | 2017           | 2018           | 2019           | 2020           | 2020 % Share  |
|---------------------------|----------------|----------------|----------------|----------------|----------------|---------------|
| United States             | 472,923        | 496,826        | 538,881        | 623,363        | 658,280        | 99.5%         |
| Panama                    | 1,738          | 1,901          | 1,683          | 1,767          | 1,295          | 0.2%          |
| Curaçao                   | 416            | 430            | 286            | 329            | 338            | 0.1%          |
| Bermuda                   | 265            | 244            | 265            | 286            | 313            | 0.0%          |
| Aruba                     | 218            | 226            | 255            | 380            | 173            | 0.0%          |
| Venezuela                 | 278            | 0              | 0              | 117            | 129            | 0.0%          |
| Barbados                  | 99             | 108            | 94             | 88             | 92             | 0.0%          |
| United Arab Emirates      | 148            | 87             | 93             | 100            | 59             | 0.0%          |
| Japan                     | 205            | 140            | 141            | 113            | 46             | 0.0%          |
| Sint Maarten (Dutch part) | 82             | 53             | 57             | 98             | 30             | 0.0%          |
| Others                    | 665            | 706            | 760            | 933            | 544            | 0.1%          |
| <b>Total</b>              | <b>477,037</b> | <b>500,722</b> | <b>542,514</b> | <b>627,575</b> | <b>661,301</b> | <b>100.0%</b> |

Note:

1. Includes Christmas trees.

Source: Statistics Canada (CATSNet, July 2021)



### 3.2.4. Christmas tree exports by province<sup>1</sup> (thousands of Canadian dollars)

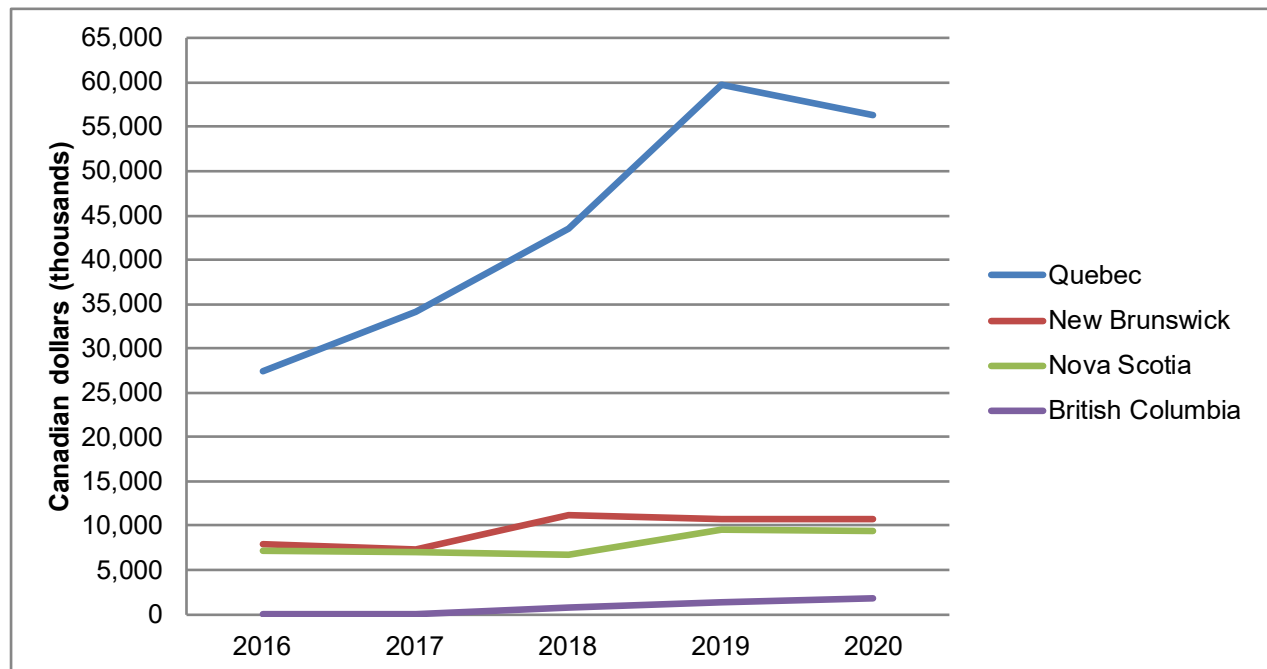
|                  | 2016          | 2017          | 2018          | 2019          | 2020          | 2020 % Share  |
|------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Nova Scotia      | 7,208         | 7,072         | 6,701         | 9,477         | 9,455         | 12.0%         |
| New Brunswick    | 7,894         | 7,297         | 11,233        | 10,788        | 10,696        | 13.6%         |
| Quebec           | 27,426        | 34,157        | 43,576        | 59,807        | 56,269        | 71.4%         |
| Ontario          | 474           | 863           | 649           | 408           | 513           | 0.7%          |
| Manitoba         | 0             | 0             | 9             | 0             | 0             | 0.0%          |
| Saskatchewan     | 34            | 9             | 24            | 34            | 39            | 0.0%          |
| British Columbia | 53            | 9             | 686           | 1,323         | 1,796         | 2.3%          |
| <b>Canada</b>    | <b>43,090</b> | <b>49,406</b> | <b>62,878</b> | <b>81,837</b> | <b>78,768</b> | <b>100.0%</b> |

Note:

1. Newfoundland and Labrador, Prince Edward Island and Alberta did not export Christmas trees during the five-year range presented in this table.

Source: Statistics Canada (CATSNet, July 2021)

### 3.2.5. Christmas tree export value by province, 2016–2020



Source: Statistics Canada (CATSNet, July 2021)



### 3.2.6. Christmas tree exports by province<sup>1</sup> (number)

|                  | 2016             | 2017             | 2018             | 2019             | 2020             | 2020 % Share  |
|------------------|------------------|------------------|------------------|------------------|------------------|---------------|
| Nova Scotia      | 353,586          | 317,438          | 280,512          | 392,149          | 419,485          | 16.1%         |
| New Brunswick    | 298,425          | 250,557          | 314,687          | 345,861          | 335,772          | 12.9%         |
| Quebec           | 1,265,217        | 1,666,198        | 1,610,529        | 2,046,599        | 1,771,736        | 68.0%         |
| Ontario          | 23,491           | 34,486           | 25,040           | 13,888           | 20,887           | 0.8%          |
| Manitoba         | 0                | 0                | 851              | 0                | 0                | 0.0%          |
| Saskatchewan     | 2,412            | 695              | 1,425            | 1,273            | 2,262            | 0.1%          |
| British Columbia | 9,358            | 713              | 25,597           | 39,931           | 53,562           | 2.1%          |
| <b>Canada</b>    | <b>1,952,489</b> | <b>2,270,087</b> | <b>2,258,641</b> | <b>2,839,701</b> | <b>2,603,704</b> | <b>100.0%</b> |

Note:

1. Newfoundland and Labrador, Prince Edward Island and Alberta did not export Christmas trees during the five-year range presented in this table.

Source: Statistics Canada (CATSNet, July 2021)



### 3.2.7. Canada's top ten Christmas tree destinations (thousands of Canadian dollars)

|  | 2016          | 2017          | 2018          | 2019          | 2020          | 2020 % Share  |
|--|---------------|---------------|---------------|---------------|---------------|---------------|
| United States                                  | 39,662        | 46,043        | 59,953        | 78,315        | 76,069        | 96.6%         |
| Panama   | 1,738         | 1,901         | 1,683         | 1,767         | 1,295         | 1.6%          |
| Curaçao  | 416           | 430           | 286           | 329           | 328           | 0.4%          |
| Bermuda  | 264           | 242           | 243           | 269           | 313           | 0.4%          |
| Aruba  | 218           | 226           | 255           | 351           | 173           | 0.2%          |
| Venezuela                                      | 278           | 0             | 0             | 117           | 129           | 0.2%          |
| Barbados                                       | 82            | 88            | 74            | 74            | 90            | 0.1%          |
| Bahamas  | 22            | 34            | 55            | 71            | 72            | 0.1%          |
| Cayman Islands                                 | 29            | 73            | 52            | 80            | 71            | 0.1%          |
| United Arab Emirates                           | 148           | 87            | 93            | 100           | 59            | 0.1%          |
| Others   | 234           | 281           | 186           | 364           | 167           | 0.2%          |
| <b>Total</b>                                   | <b>43,090</b> | <b>49,406</b> | <b>62,878</b> | <b>81,837</b> | <b>78,768</b> | <b>100.0%</b> |
| Source: Statistics Canada (CATSNet, July 2021) |               |               |               |               |               |               |

### 3.2.8. Canada's top ten Christmas tree destinations (number)

|  | 2016             | 2017             | 2018             | 2019             | 2020             | 2020 % Share  |
|--|------------------|------------------|------------------|------------------|------------------|---------------|
| United States                                  | 1,866,218        | 2,206,996        | 2,196,069        | 2,769,207        | 2,553,133        | 98.1%         |
| Panama   | 51,133           | 32,057           | 35,690           | 34,394           | 20,912           | 0.8%          |
| Bermuda  | 5,466            | 6,321            | 5,708            | 6,470            | 6,982            | 0.3%          |
| Curaçao  | 7,680            | 7,856            | 5,975            | 5,811            | 6,287            | 0.2%          |
| Aruba  | 4,189            | 3,963            | 4,676            | 6,990            | 3,416            | 0.1%          |
| Venezuela                                      | 6,206            | 0                | 0                | 2,201            | 2,674            | 0.1%          |
| Barbados                                       | 1,620            | 1,745            | 1,935            | 1,354            | 2,046            | 0.1%          |
| Cayman Islands                                 | 1,022            | 1,624            | 1,419            | 2,207            | 1,958            | 0.1%          |
| United Arab Emirates                           | 3,921            | 1,906            | 2,220            | 2,092            | 1,297            | 0.0%          |
| Bahamas  | 333              | 955              | 1,216            | 1,617            | 1,125            | 0.0%          |
| Others   | 1,947,788        | 2,263,423        | 2,254,908        | 2,832,343        | 2,599,830        | 99.9%         |
| <b>Total</b>                                   | <b>1,952,489</b> | <b>2,270,087</b> | <b>2,258,641</b> | <b>2,839,701</b> | <b>2,603,704</b> | <b>100.0%</b> |
| Source: Statistics Canada (CATSNet, July 2021) |                  |                  |                  |                  |                  |               |



### 3.2.9. Canada's floriculture and nursery<sup>1</sup> export destinations by U.S. state (thousands of Canadian dollars)

|                             | 2016           | 2017           | 2018           | 2019           | 2020           | 2020 %<br>Share |
|-----------------------------|----------------|----------------|----------------|----------------|----------------|-----------------|
| New York                    | 59,799         | 64,505         | 68,028         | 77,009         | 74,865         | 11.4%           |
| Washington, state           | 40,375         | 43,009         | 43,873         | 49,636         | 52,118         | 7.9%            |
| Florida                     | 31,400         | 30,236         | 36,013         | 42,387         | 51,721         | 7.9%            |
| Illinois                    | 23,019         | 25,588         | 29,520         | 38,918         | 42,479         | 6.5%            |
| Michigan                    | 28,805         | 30,244         | 32,641         | 41,162         | 39,683         | 6.0%            |
| Massachusetts               | 33,102         | 32,827         | 31,692         | 37,084         | 35,944         | 5.5%            |
| California                  | 25,362         | 28,609         | 30,608         | 28,526         | 32,110         | 4.9%            |
| New Jersey                  | 20,400         | 20,679         | 22,428         | 26,263         | 29,274         | 4.4%            |
| Ohio                        | 17,790         | 21,844         | 22,691         | 25,521         | 28,890         | 4.4%            |
| Maine                       | 24,252         | 24,838         | 25,338         | 27,590         | 28,377         | 4.3%            |
| Other U.S. states           | 168,618        | 174,448        | 196,049        | 229,267        | 242,819        | 36.9%           |
| <b>Total, United States</b> | <b>472,923</b> | <b>496,826</b> | <b>538,881</b> | <b>623,363</b> | <b>658,280</b> | <b>100.0%</b>   |

Note:

1. Includes Christmas trees.

Source: Statistics Canada (CATSNet, July 2021)





### 3.3. Imports

#### 3.3.1. Floriculture and nursery<sup>1</sup> imports by province (thousands of Canadian dollars)

|                           | 2016           | 2017           | 2018           | 2019           | 2020           | 2020 % Share  |
|---------------------------|----------------|----------------|----------------|----------------|----------------|---------------|
| Newfoundland and Labrador | 101            | 106            | 129            | 126            | 32             | 0.0%          |
| Prince Edward Island      | 10             | 4              | 0              | 8              | 0              | 0.0%          |
| Nova Scotia               | 1,459          | 1,627          | 1,839          | 1,883          | 3,651          | 0.7%          |
| New Brunswick             | 6,215          | 7,314          | 8,405          | 9,872          | 10,202         | 1.9%          |
| Quebec                    | 66,070         | 64,910         | 59,996         | 56,685         | 60,220         | 11.0%         |
| Ontario                   | 262,907        | 289,971        | 306,071        | 325,958        | 306,570        | 55.9%         |
| Manitoba                  | 32,159         | 27,662         | 30,331         | 26,509         | 25,023         | 4.6%          |
| Saskatchewan              | 5,877          | 2,947          | 4,201          | 6,593          | 12,711         | 2.3%          |
| Alberta                   | 7,687          | 15,307         | 11,238         | 10,798         | 7,180          | 1.3%          |
| British Columbia          | 115,915        | 121,226        | 125,037        | 128,934        | 122,432        | 22.3%         |
| <b>Canada</b>             | <b>498,399</b> | <b>531,074</b> | <b>547,248</b> | <b>567,367</b> | <b>548,021</b> | <b>100.0%</b> |

Note:

1. Includes Christmas trees.

Source: Statistics Canada (CATSNet, July 2021)

#### 3.3.2. Top ten sources of Canada's floriculture and nursery<sup>1</sup> imports (thousands of Canadian dollars)

|               | 2016           | 2017           | 2018           | 2019           | 2020           | 2020 % Share  |
|---------------|----------------|----------------|----------------|----------------|----------------|---------------|
| United States | 230,182        | 251,838        | 261,485        | 276,636        | 284,079        | 51.8%         |
| Colombia      | 103,526        | 111,072        | 111,380        | 106,706        | 87,933         | 16.0%         |
| Netherlands   | 55,923         | 58,827         | 61,723         | 58,346         | 60,875         | 11.1%         |
| Ecuador       | 39,015         | 37,764         | 36,525         | 37,229         | 30,937         | 5.6%          |
| Mexico        | 8,495          | 8,719          | 10,594         | 13,815         | 14,808         | 2.7%          |
| Taiwan        | 6,780          | 6,660          | 8,280          | 11,182         | 8,789          | 1.6%          |
| Guatemala     | 5,726          | 6,289          | 7,522          | 7,431          | 8,077          | 1.5%          |
| China         | 3,932          | 4,365          | 4,020          | 5,870          | 7,100          | 1.3%          |
| Costa Rica    | 6,197          | 5,458          | 5,548          | 5,762          | 5,389          | 1.0%          |
| India         | 3,473          | 3,851          | 4,164          | 4,274          | 3,711          | 0.7%          |
| Others        | 35,150         | 36,231         | 36,008         | 40,115         | 36,322         | 6.6%          |
| <b>Total</b>  | <b>498,399</b> | <b>531,074</b> | <b>547,248</b> | <b>567,367</b> | <b>548,021</b> | <b>100.0%</b> |

Note:

1. Includes Christmas trees.

Source: Statistics Canada (CATSNet, July 2021)



### 3.4. World trade data

#### 3.4.1. Top ten exporting countries for floriculture, nursery and Christmas trees (thousands of Canadian dollars)

|               | 2016              | 2017              | 2018              | 2019              | 2020              | 2020 % Share  |
|---------------|-------------------|-------------------|-------------------|-------------------|-------------------|---------------|
| Netherlands   | 12,851,550        | 13,198,359        | 14,197,377        | 14,424,559        | 14,862,558        | 49.1%         |
| Colombia      | 1,758,789         | 1,846,648         | 1,913,830         | 1,986,219         | 1,923,731         | 6.4%          |
| Germany       | 1,344,479         | 1,335,156         | 1,465,103         | 1,428,553         | 1,445,704         | 4.8%          |
| Italy         | 1,113,879         | 1,212,402         | 1,365,030         | 1,343,393         | 1,376,513         | 4.5%          |
| Ecuador       | 1,071,972         | 1,159,629         | 1,110,364         | 1,177,241         | 1,135,638         | 3.7%          |
| Kenya         | 750,210           | 787,804           | 815,550           | 864,849           | 852,914           | 2.8%          |
| Belgium       | 799,324           | 784,450           | 914,955           | 921,487           | 850,522           | 2.8%          |
| Spain         | 481,418           | 523,479           | 632,502           | 671,308           | 675,942           | 2.2%          |
| Denmark       | 633,217           | 639,899           | 638,238           | 630,559           | 673,450           | 2.2%          |
| <b>Canada</b> | <b>477,037</b>    | <b>500,722</b>    | <b>542,514</b>    | <b>627,575</b>    | <b>661,301</b>    | <b>2.2%</b>   |
| Others        | 4,859,020         | 4,998,428         | 5,424,783         | 5,838,450         | 5,826,316         | 19.2%         |
| <b>Total</b>  | <b>26,140,894</b> | <b>26,986,978</b> | <b>29,020,246</b> | <b>29,914,191</b> | <b>30,284,588</b> | <b>100.0%</b> |

Source: Global Trade Tracker (July 2021)

#### 3.4.2. Top ten importing countries for floriculture, nursery and Christmas trees (thousands of Canadian dollars)

|                     | 2016              | 2017              | 2018              | 2019              | 2020              | 2020 % Share  |
|---------------------|-------------------|-------------------|-------------------|-------------------|-------------------|---------------|
| Germany             | 4,082,219         | 4,103,897         | 4,400,504         | 4,317,099         | 4,418,667         | 16.2%         |
| Netherlands         | 3,166,446         | 3,275,447         | 3,477,670         | 3,447,790         | 3,660,680         | 13.4%         |
| United States       | 2,874,627         | 2,969,817         | 3,143,665         | 3,431,018         | 3,425,018         | 12.5%         |
| United Kingdom      | 2,128,309         | 2,013,124         | 2,078,718         | 1,992,829         | 2,025,811         | 7.4%          |
| France              | 1,545,543         | 1,582,264         | 1,702,263         | 1,695,531         | 1,628,049         | 6.0%          |
| Switzerland         | 733,054           | 730,484           | 769,641           | 756,629           | 788,808           | 2.9%          |
| Japan               | 773,905           | 758,406           | 787,588           | 797,759           | 742,205           | 2.7%          |
| Belgium             | 589,458           | 569,996           | 656,436           | 721,956           | 739,613           | 2.7%          |
| Italy               | 795,777           | 824,419           | 794,236           | 589,742           | 718,345           | 2.6%          |
| Russia              | 766,489           | 739,964           | 783,907           | 749,532           | 703,603           | 2.6%          |
| Others <sup>1</sup> | 6,889,745         | 7,553,235         | 8,381,108         | 8,627,904         | 8,481,584         | 31.0%         |
| <b>Total</b>        | <b>24,345,573</b> | <b>25,121,052</b> | <b>26,975,734</b> | <b>27,127,789</b> | <b>27,332,382</b> | <b>100.0%</b> |

Note:

1. In 2020, Canada ranked 14th globally with imports totalling \$548 million.

Source: Global Trade Tracker (July 2021)



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## 4. Channels of distribution

Ornamental products are distributed through multiple channels. The first year of the COVID-19 pandemic saw disruptions in many retail chains, and operating restrictions at most retail stores. As indoor stores were difficult to enter or forced to close for many weeks mass-market chain stores, which are the dominant distributors of floriculture products, saw their proportion of sales drop sharply (-57.7%) in favor of direct sales to the public (up 132.0%). Mass-market chain stores accounted for 27.4% of total sales by value in 2019 but dropped to 11.0% in 2020. Conversely, direct sales to the public accounted for 14.0% of total sales by value in 2019 but rose to 30.4% in 2020. Landscape contractors and garden centers continued to be the two largest distribution channels for nursery products, making up 24.3% and 17.9% of total sales by value, respectively.



#### 4.1. Channels of distribution for flowers and plant sales and resales (millions of Canadian dollars)

|   | 2016           | 2017           | 2018           | 2019           | 2020           | 2020 % Share  |
|---|----------------|----------------|----------------|----------------|----------------|---------------|
| Direct sales to the public <sup>1</sup> | 224.1          | 201.4          | 218.9          | 219.6          | 509.4          | 30.4%         |
| Domestic wholesalers                    | 278.8          | 283.1          | 309.6          | 317.4          | 284.7          | 17.0%         |
| Exported                                | 144.4          | 141.9          | 158.9          | 210.1          | 248.9          | 14.8%         |
| Government and public agencies          | 13.1           | 11.6           | 12.2           | 10.9           | 214.2          | 12.8%         |
| Mass market chain stores                | 476.1          | 488.7          | 474.3          | 436.5          | 184.2          | 11.0%         |
| Other channels                          | 41.3           | 36.2           | 38.0           | 28.4           | 180.3          | 10.8%         |
| Other greenhouses                       | 161.2          | 175.2          | 160.0          | 175.3          | 43.6           | 2.6%          |
| Retail florists                         | 171.1          | 165.7          | 183.8          | 177.4          | 12.2           | 0.7%          |
| <b>Total sales<sup>2</sup></b>          | <b>1,510.2</b> | <b>1,503.9</b> | <b>1,555.7</b> | <b>1,575.4</b> | <b>1,677.5</b> | <b>100.0%</b> |

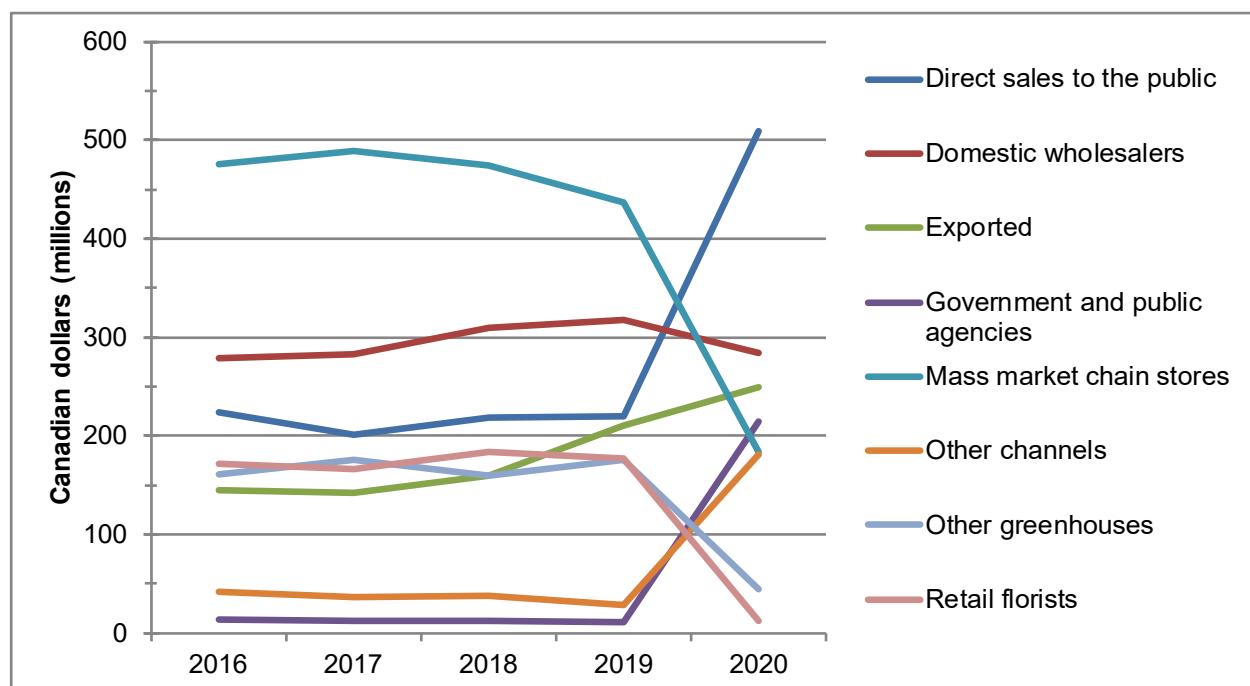
Notes:

1. Includes roadside stands and owner-operated retail outlets.

2. Operations which exclusively produce tree seedlings for reforestation are outside the scope of the 2016 survey. Prior surveys have included their production, affecting also greenhouse area, production, sales, labour and expenses variables.

Source: Statistics Canada. Table 32-10-0022-01 Channels of distribution for horticulture product sales and resales

#### 4.2. Channels of distribution for flowers and plant sales and resales, 2016–2020



Source: Statistics Canada. Table 32-10-0022-01 Channels of distribution for horticulture product sales and resales



#### 4.3. Channels of distribution for nursery product sales and resales (millions of Canadian dollars)

|   | 2016         | 2017         | 2018         | 2019         | 2020         | 2020 % Share  |
|---|--------------|--------------|--------------|--------------|--------------|---------------|
| Landscape contractors                   | 177.1        | 182.4        | 170.2        | 173.4        | 176.7        | 24.3%         |
| Garden centres                          | 130.8        | 122.3        | 115.5        | 116.2        | 130.5        | 17.9%         |
| Mass market chain stores                | 107.8        | 100.7        | 106.2        | 109.0        | 121.3        | 16.7%         |
| Direct sales to the public <sup>1</sup> | 75.1         | 89.4         | 97.0         | 107.3        | 102.4        | 14.1%         |
| Other growers                           | 79.4         | 75.2         | 75.6         | 77.4         | 65.3         | 9.0%          |
| Exported                                | 22.2         | 25.7         | 30.5         | 27.1         | 36.9         | 5.1%          |
| Other channels                          | 24.0         | 19.9         | 21.0         | 20.5         | 35.8         | 4.9%          |
| Fruit growers                           | 22.9         | 20.2         | 22.2         | 25.1         | 32.7         | 4.5%          |
| Government and public agencies          | 31.2         | 23.9         | 22.6         | 23.8         | 25.3         | 3.5%          |
| <b>Total sales<sup>2</sup></b>          | <b>670.5</b> | <b>659.5</b> | <b>660.8</b> | <b>679.8</b> | <b>727.0</b> | <b>100.0%</b> |

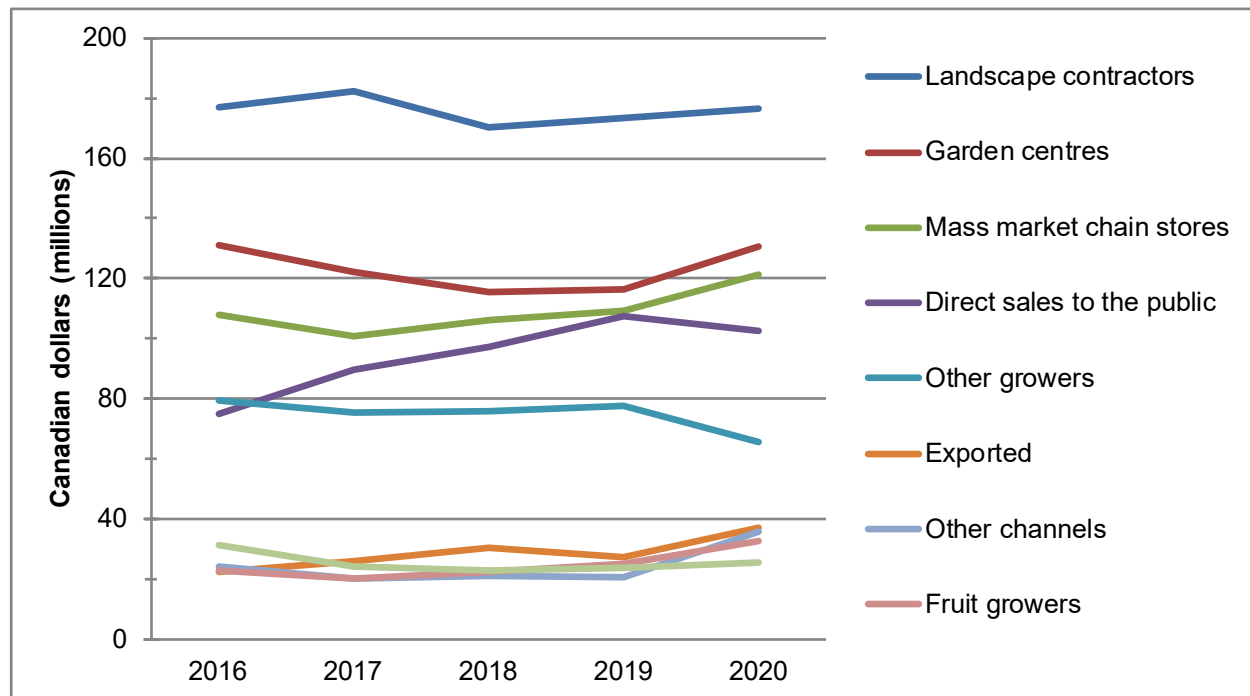
Notes:

1. Includes roadside stands and owner-operated retail outlets.

2. Operations which exclusively produce tree seedlings for reforestation are outside the scope of the 2016 survey. Prior surveys have included their production, affecting also greenhouse area, production, sales, labour and expenses variables.

Source: Statistics Canada. Table 32-10-0033-01 Channels of distribution for nursery product sales and resales

#### 4.4. Channels of distribution for nursery product sales and resales, 2016–2020



Source: Statistics Canada. Table 32-10-0033-01 Channels of distribution for nursery product sales and resales



## 5. Operating expenses

Greenhouse flower and plant producers operating expenses rose 3.3% over the previous year to \$1.1 billion in 2020, which is 1.8% above the 10-year average. Other operating expenses<sup>1</sup> (+6.3%), plant material purchases for growing on (+5.3%), other crop expenses<sup>2</sup> (+5.2%), electricity (+4.2%) and payroll (+1.8%) rose at the fastest pace in 2020. Some increased hiring of permanent employees may have contributed to the increase in payroll expenses. Year over-year greenhouse flower and plant producers' natural gas costs decreased by 14.1% to \$47.2 million in 2020.

Nursery operating expenses edged up 0.6% to \$592.9 million, while total payroll expenses increased 1.1% to \$197.5 million. The average per person payroll cost grew 7.3% to \$22,144 per employee.

Turf sod operating expenses grew 3.0% to \$104 million.

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<sup>1</sup> Includes interest, land taxes, insurance, advertising, repairs to farm buildings, machinery, agricultural equipment and vehicles, contract work, and telephone and telecommunications services.

<sup>2</sup> Includes fertilizer, pesticides, pollination, irrigation, containers, packaging, bioprograms, and growing mediums such as soil, peat moss, vermiculite, perlite, sand, Styrofoam and sawdust.



### 5.1. Greenhouse flower and plant<sup>1</sup> producers' operating expenses by category (millions of Canadian dollars)

|  | 2016           | 2017           | 2018           | 2019           | 2020           | 2020 %<br>Share |
|--|----------------|----------------|----------------|----------------|----------------|-----------------|
| Gross yearly payroll <sup>2</sup>                    | 322.6          | 294.7          | 292.4          | 300.7          | 306.2          | 28.3%           |
| Plant material purchases for growing on <sup>3</sup> | 216.0          | 219.9          | 213.2          | 212.4          | 223.5          | 20.6%           |
| Other crop expenses <sup>4</sup>                     | 141.2          | 156.8          | 150.2          | 161.1          | 169.4          | 15.6%           |
| Plant material purchases for resale <sup>3</sup>     | 114.4          | 113.2          | 112.5          | 104.1          | 108.1          | 10.0%           |
| Fuel   | 55.3           | 54.2           | 58.0           | 54.9           | 47.2           | 4.4%            |
| Electricity <sup>5</sup>                             | 28.9           | 25.8           | 26.0           | 25.0           | 26.2           | 2.4%            |
| Other operating expenses <sup>6</sup>                | 208.5          | 183.2          | 181.8          | 190.9          | 203.0          | 18.7%           |
| <b>Total operating expenses<sup>7</sup></b>          | <b>1,086.8</b> | <b>1,047.9</b> | <b>1,034.2</b> | <b>1,049.1</b> | <b>1,083.7</b> | <b>100.0%</b>   |

Notes:

1. This category excludes mixed operations (vegetables, flowers and plants).

2. Includes seasonal and permanent labour.

3. Includes value of flowers, plants, cuttings, seedlings, seeds and bulbs purchased (before sales tax).

4. Includes fertilizer, pesticides, pollination, irrigation, containers, packaging, bioprograms, and growing mediums such as soil, peat moss, vermiculite, perlite, sand, Styrofoam and sawdust.

5. Includes electricity for lighting, airflow fans and heating.

6. Includes interest, land taxes, insurance, advertising, repairs to farm buildings, machinery, agricultural equipment and vehicles, contract work, and telephone and telecommunications services.

7. Operations which exclusively produce tree seedlings for reforestation are outside the scope of the 2016 survey. Prior surveys have included their production, affecting also greenhouse area, production, sales, labour and expenses variables.

Source: Statistics Canada. Table 32-10-0025-01 Specialized greenhouse producers' operating expenses

### 5.2. Greenhouse flower and plant producers' operating expenses by province (millions of Canadian dollars)

|                    | 2016           | 2017           | 2018           | 2019           | 2020           | 2020 %<br>Share |
|--------------------|----------------|----------------|----------------|----------------|----------------|-----------------|
| Atlantic provinces | 52.0           | 54.6           | 55.8           | 57.4           | 61.5           | 5.7%            |
| Quebec             | 119.0          | 115.8          | 116.3          | 123.6          | 123.1          | 11.4%           |
| Ontario            | 614.7          | 606.4          | 594.8          | 608.0          | 608.5          | 56.1%           |
| Prairie provinces  | 79.3           | 81.4           | 87.2           | 78.9           | 87.7           | 8.1%            |
| British Columbia   | 221.7          | 190.6          | 180.1          | 181.2          | 203.0          | 18.7%           |
| <b>Canada</b>      | <b>1,086.8</b> | <b>1,047.9</b> | <b>1,034.2</b> | <b>1,049.1</b> | <b>1,083.7</b> | <b>100.0%</b>   |

Source: Statistics Canada. Table 32-10-0025-01 Specialized greenhouse producers' operating expenses



### 5.3. Nursery operating expenses<sup>1</sup> by category (millions of Canadian dollars)

|  | 2016         | 2017         | 2018         | 2019         | 2020         | 2020 % Share  |
|--|--------------|--------------|--------------|--------------|--------------|---------------|
| Gross yearly payroll <sup>2</sup>                    | 201.6        | 197.2        | 191.7        | 195.3        | 197.5        | 33.3%         |
| Plant material purchases for growing on <sup>3</sup> | 96.4         | 97.2         | 99.2         | 102.3        | 106.5        | 18.0%         |
| Plant material purchases for resale <sup>3</sup>     | 98.4         | 94.3         | 97.6         | 99.8         | 93.3         | 15.7%         |
| Other crop expenses <sup>4</sup>                     | 60.5         | 62.2         | 64.9         | 64.9         | 66.5         | 11.2%         |
| Electricity expenses                                 | 5.7          | 4.6          | 5.5          | 6.0          | 6.2          | 1.1%          |
| Other operating expenses <sup>5</sup>                | 115.5        | 110.1        | 116.3        | 120.9        | 122.8        | 20.7%         |
| <b>Total Operating Expenses</b>                      | <b>578.2</b> | <b>565.6</b> | <b>575.2</b> | <b>589.2</b> | <b>592.9</b> | <b>100.0%</b> |

Notes:

- Operations which exclusively produce tree seedlings for reforestation are outside the scope of the 2016 survey. Prior surveys have included their production, affecting also greenhouse area, production, sales, labour and expenses variables.
- Includes seasonal and permanent labour.
- Includes value of trees, nursery stock, bedding plants, seedlings, cuttings or bulbs purchased before sales tax.
- Includes fertilizer, pesticides, pollination, irrigation, containers, packaging, bioprograms and growing mediums such as soil, peat moss, vermiculite, perlite, sand, Styrofoam and sawdust.
- Includes interest, land taxes, insurance, advertising, repairs to farm buildings, machinery, agricultural equipment and vehicles, contract work, and telephone and telecommunications services.

Source: Statistics Canada. Table 32-10-0454-01 Nursery and sod producers' operating expenses

### 5.4. Nursery operating expenses by province (millions of Canadian dollars)

|                           | 2016         | 2017         | 2018         | 2019         | 2020         | 2020 % Share  |
|---------------------------|--------------|--------------|--------------|--------------|--------------|---------------|
| Newfoundland and Labrador | x            | x            | 0.6          | 0.5          | 0.5          | 0.1%          |
| Prince Edward Island      | x            | x            | 0.9          | 0.8          | 1.1          | 0.2%          |
| Nova Scotia               | 10.2         | 10.2         | 10.7         | 10.3         | 11.0         | 1.9%          |
| New Brunswick             | 3.5          | 3.4          | 2.6          | 2.3          | 2.3          | 0.4%          |
| Quebec                    | 78.3         | 78.2         | 74.5         | 76.0         | 79.9         | 13.5%         |
| Ontario                   | 272.6        | 257.8        | 253.7        | 260.6        | 254.2        | 42.9%         |
| Manitoba                  | 13.0         | 12.7         | 13.2         | 12.6         | 13.1         | 2.2%          |
| Saskatchewan              | 4.1          | 4.8          | 5.6          | 6.2          | 5.2          | 0.9%          |
| Alberta                   | 41.5         | 42.1         | 40.5         | 39.9         | 38.8         | 6.5%          |
| British Columbia          | 153.4        | 154.7        | 173.0        | 180.0        | 186.8        | 31.5%         |
| <b>Canada</b>             | <b>578.2</b> | <b>565.6</b> | <b>575.2</b> | <b>589.2</b> | <b>592.9</b> | <b>100.0%</b> |

Note:

x: Suppressed to meet the confidentiality requirements of the *Statistics Act*.

Source: Statistics Canada. Table 32-10-0454-01 Nursery and sod producers' operating expenses





### 5.5. Sod operating expenses by category (millions of Canadian dollars)

|   | 2016         | 2017         | 2018         | 2019         | 2020         | 2020 % Share  |
|---|--------------|--------------|--------------|--------------|--------------|---------------|
| Gross yearly payroll <sup>1</sup>           | 40.8         | 38.9         | 37.2         | 37.3         | 38.0         | 35.2%         |
| Sod purchases for resale                    | 1.4          | 2.7          | 2.5          | 2.2          | 2.7          | 2.5%          |
| Other operating expenses <sup>2</sup>       | 75.1         | 71.7         | 65.8         | 65.4         | 67.3         | 62.3%         |
| <b>Total operating expenses<sup>3</sup></b> | <b>117.4</b> | <b>113.3</b> | <b>105.5</b> | <b>104.9</b> | <b>108.0</b> | <b>100.0%</b> |

Notes:

1. Includes seasonal and permanent labour.

2. Includes fertilizer, pesticides, land taxes, interest, insurance, advertising, repairs, fuel, electricity, irrigation expenses, and telephone and other telecommunication services.

3. Totals may not add up as some data was suppressed to meet confidentiality requirements.

Source: Statistics Canada. Table 32-10-0454-01 Nursery and sod producers' operating expenses

### 5.6. Sod operating expenses by province (millions of Canadian dollars)

|                           | 2016         | 2017         | 2018         | 2019         | 2020         | 2020 % Share  |
|---------------------------|--------------|--------------|--------------|--------------|--------------|---------------|
| Newfoundland and Labrador | 2.0          | x            | 2.0          | 2.4          | 2.1          | 1.9%          |
| Prince Edward Island      | x            | x            | 0.4          | 0.4          | 0.4          | 0.4%          |
| Nova Scotia               | 3.8          | 3.9          | 4.0          | 3.6          | 4.0          | 3.7%          |
| New Brunswick             | x            | 2.5          | 2.0          | 1.9          | 2.0          | 1.8%          |
| Quebec                    | 24.5         | 23.7         | 22.1         | 23.1         | 25.4         | 23.5%         |
| Ontario                   | 46.4         | 45.0         | 41.8         | 41.0         | 43.7         | 40.4%         |
| Manitoba                  | 3.0          | 2.9          | 2.8          | 3.2          | 3.2          | 2.9%          |
| Saskatchewan              | 3.6          | 3.2          | 3.3          | 3.3          | 3.2          | 3.0%          |
| Alberta                   | 22.0         | 18.8         | 17.2         | 15.8         | 14.0         | 13.0%         |
| British Columbia          | 9.9          | 10.5         | 9.9          | 10.2         | 10.2         | 9.4%          |
| <b>Canada<sup>1</sup></b> | <b>117.4</b> | <b>113.3</b> | <b>105.5</b> | <b>104.9</b> | <b>108.0</b> | <b>100.0%</b> |

Notes:

1. Totals may not add up as some data was suppressed to meet confidentiality requirements.

x: Suppressed to meet the confidentiality requirements of the *Statistics Act*.

Source: Statistics Canada. Table 32-10-0454-01 Nursery and sod producers' operating expenses



## 6. Labour

Labour shortages were among the most pressing concerns facing the horticulture sector in 2020. Rapidly changing COVID-19 control requirements for housing, workspaces, and retail demanded time and resources from firms. Travel restrictions, testing requirements, and availability of air and land transportation limited the ability of seasonal and temporary foreign workers to reach their workplaces in Canada. In 2020, Canada was able to bring 50,126 foreign workers in the agricultural industries, down 6.5% from 2019. Vegetable greenhouse, nursery and floriculture producers reported the largest decline in temporary foreign workers relative to the previous year, landing 1,231 fewer workers (-6.4%) for a total of 18,003.

In 2020, 24,650 people were directly employed in the production of ornamental products, down 3.0% from 2019. 58.1% of these employees worked in specialized greenhouse flower and plant operations, 36.2% in nurseries, and 5.7% on sod farms. Due to the seasonal nature of the ornamental business, each of the sub-sectors employs more seasonal labour (64.5%) than permanent labour (35.5%). Seasonal employees are defined as employees who work less than eight months during the year. The number of permanent employees rose 1.2% to 8,763, while seasonal employees decreased 5.2 % to 15,887.



## 6.1. Nursery, sod and greenhouse flowers, total employees<sup>1</sup>

|   |                                  | 2016          | 2017          | 2018          | 2019          | 2020          |
|---|----------------------------------|---------------|---------------|---------------|---------------|---------------|
| Nursery                                   | Seasonal employees <sup>2</sup>  | 7,896         | 7,184         | 6,812         | 6,341         | 5,837         |
|   | Permanent employees <sup>3</sup> | 3,560         | 3,331         | 3,044         | 3,126         | 3,083         |
|   | <b>Total employees</b>           | <b>11,456</b> | <b>10,515</b> | <b>9,856</b>  | <b>9,467</b>  | <b>8,920</b>  |
| Sod                                       | Seasonal employees <sup>2</sup>  | 1,117         | 1,140         | 1,126         | 1,117         | 1,030         |
|   | Permanent employees <sup>3</sup> | 461           | 428           | 411           | 414           | 381           |
|   | <b>Total employees</b>           | <b>1,578</b>  | <b>1,568</b>  | <b>1,537</b>  | <b>1,531</b>  | <b>1,411</b>  |
| Specialized greenhouse flowers and plants | Seasonal employees <sup>2</sup>  | 10,893        | 10,195        | 9,725         | 9,303         | 9,020         |
|   | Permanent employees <sup>3</sup> | 6,288         | 5,691         | 5,380         | 5,118         | 5,299         |
|   | <b>Total employees</b>           | <b>17,181</b> | <b>15,886</b> | <b>15,105</b> | <b>14,421</b> | <b>14,319</b> |

Notes:

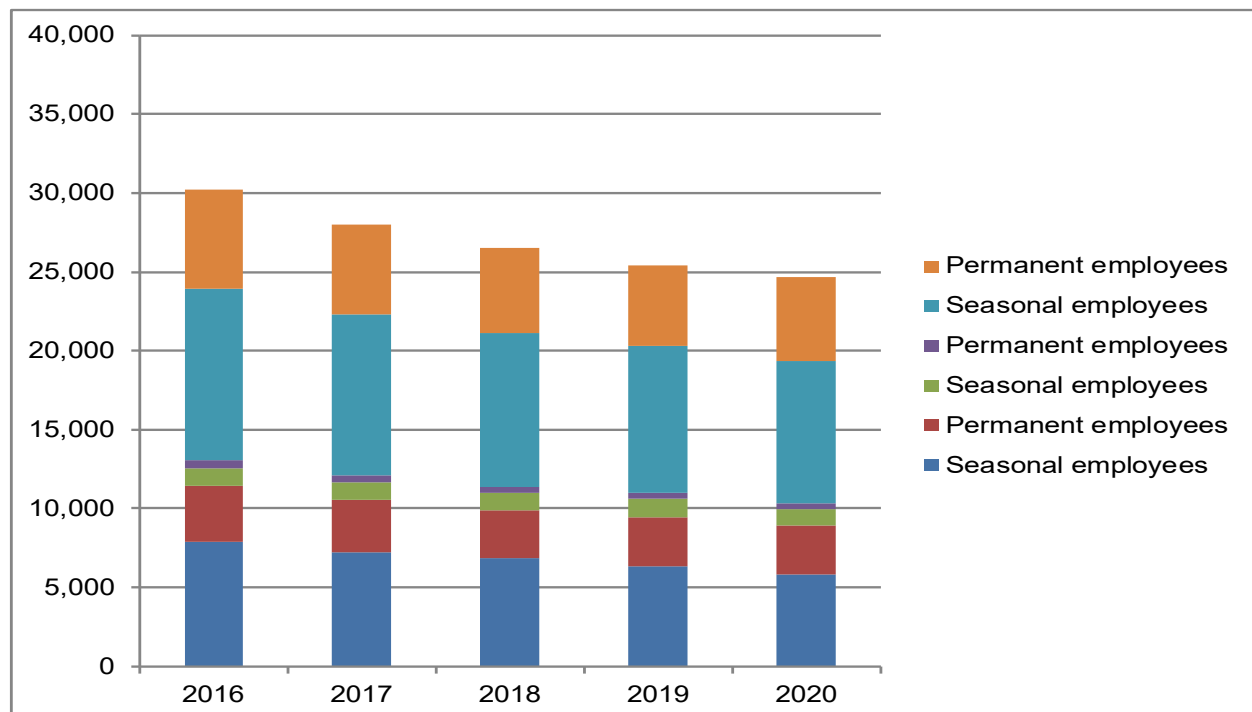
1. Operations which exclusively produce tree seedlings for reforestation are outside the scope of the 2016 survey. Prior surveys have included their production, affecting also greenhouse area, production, sales, labour and expenses variables.

2. Seasonal employees who worked less than 8 months during the year.

3. Permanent employees who worked more than 8 months during the year.

Source: Statistics Canada. Tables 32-10-0026-01 and 32-10-0028-01

## 6.2. Total employees by sector, 2016–2020



Source: Statistics Canada. Tables 32-10-0026-01 and 32-10-0028-01



## 7. Key Resources

Global Trade Tracker

Statistics Canada. Table 32-10-0421-01 Christmas trees

Statistics Canada. Table 32-10-0019-01 Estimates of specialized greenhouse operations, greenhouse area, and months of operation

Statistics Canada. Table 32-10-0246-01 Production and sale of greenhouse flowers and plants

Statistics Canada. Table 32-10-0021-01 Production of plants, flowers and tree seedlings

Statistics Canada. Table 32-10-0034-01 Estimates of sod area, sales and resales

Statistics Canada. Table 32-10-0023-01 Total value of greenhouse products

Statistics Canada. Table 32-10-0032-01 Nursery stock sales and resales

Statistics Canada. Table 32-10-0022-01 Channels of distribution for horticulture product sales and resales

Statistics Canada. Table 32-10-0033-01 Channels of distribution for nursery product sales and resales

Statistics Canada. Table 32-10-0025-01 Specialized greenhouse producers' operating expenses

Statistics Canada. Table 32-10-0454-01 Nursery and sod producers' operating expenses

Statistics Canada. Table 32-10-0026-01 Total greenhouse, sod and nursery employees

Statistics Canada. Table 32-10-0028-01 Total number of employees of specialized greenhouse operations

Statistics Canada. CATSNet

HS Codes: All import and export H.S. codes fall under Chapter 06 of the Custom Tariff.

### Change in methodology at Statistics Canada in 2016

Operations which exclusively produce tree seedlings for reforestation are outside the scope of the 2016 Census of Agriculture and are therefore not included. Prior censuses may have included their production in "total area of nursery products grown for sale." Similarly, operations which exclusively produce tree seedlings for reforestation are out of scope since the 2016 greenhouse, sod and nursery survey. Prior surveys have included their production, affecting also greenhouse area, production, sales, labour and expenses variables. Therefore, figures discussed in this report may not be directly comparable with any information gathered in years prior to 2016.

A note of caution has been added to each table where the change in methodology could have an impact.

### Census of Agriculture

The most recent results of the Census of Agriculture available are those of the census carried out in 2016. The last Census of Agriculture was conducted in May 2021 and the results will be released in 2022.