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Statistical Overview of the Canadian Ornamental Industry 2018

Prepared by
Crops and Horticulture Division
Agriculture and Agri-Food Canada
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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. In 2018, the sector generated farm gate sales of \$2.34 billion, including resales by producers. Due to changes in the Statistics Canada methodology for all 2016 surveys related to the nursery sector¹, figures discussed in this report are not directly comparable to any information gathered in prior years.

Floriculture (greenhouse flowers and potted plants) remained the largest industry by revenue, accounting for 66.5% of total sales. Floriculture sales have been relatively stable over the last 5 years, totaling \$1.56 billion in 2018. Ontario, British Columbia and Quebec accounted for the majority of Canada's total floriculture sales, with Ontario contributing more than half of Canadian sales at 51.2%.

Nursery sales totaled \$643.5 million in 2018, accounting for 27.5% of total ornamental sales. By province, Ontario accounted for 41.9% of total nursery sales in 2018, followed by British Columbia and Quebec with 31.5% and 13.4%, respectively.

While most floriculture production takes place within climate controlled greenhouses, most nursery production takes place outdoors. Both sub-sectors show an increase in average farm size and a decrease in the number of operations over time leading to fewer but larger and more productive operations. The nursery industry is typically more vertically integrated than the floriculture industry with a combination of retail sales, landscaping, installation and maintenance services forming part of the income mix for many producers.

Turf sod sales totaled \$140.4 million in 2018, accounting for 6.0% of total ornamental sales. Ontario led the country in sod sales at 38.8% of the national total. While turf sod is widely used for public spaces, sports fields and similar large applications, the trend in total annual volume of turf sod sold tends to mirror that of new home construction.

Ornamental products are distributed through multiple channels. Mass-market chain stores are the primary distributors of floriculture products, accounting for 30.6% of total sales in 2018. However, landscape contractors and garden centres are the two largest distribution channels for nursery products, making up 26.1% and 17.7% of total sales, respectively.

In 2018, 26,423 people were directly employed in the production of ornamental products. 57.2% of these employees worked in specialized greenhouse flower and plant operations, 37.3% in nurseries, and 5.5% on sod farms. Due to the seasonal nature of the ornamental business, each of the sub-sectors employs more seasonal labour than permanent labour. Seasonal employees are defined as employees who work less than eight months during the year. 64.4% percent of greenhouse flower and plant production employees were seasonal workers, while 73.2% of sod workers and 69.1% of nursery workers fell into the seasonal category.

Canada's largest ornamental trade partner continues to be the United States, accounting for 99.3% of exports and 47.8% of imports in the sector. Canadian worldwide exports totaled \$543.0 million in 2018, and imports amounted to \$547.3 million, resulting to a net negative trade balance of approximately \$4.3 million, down \$30.4 million from 2017.

¹ Due to changes in the census methodology for 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/surveys may have included their production in "total area of nursery products grown for sale".



1. Production

1.1. Number of Canadian ornamental farms¹ by sub-sector

	2011	2016	Change
Floriculture ²	3,016	2,403	-20.3%
Nursery ³	3,438	2,780	-19.1%
Sod	375	265	-29.3%
Christmas trees	2,381	1,872	-21.4%
Total	9,210	7,320	-20.5%

Notes:

1. Number of farms includes all farms reported to be growing floriculture, nursery, sod and Christmas trees, and not exclusively farms in which ornamental production represents 50% or more of total farm cash receipts.

2. Greenhouse flowers. Note that in 2011, some respondents incorrectly reported "vegetable plants for sale" resulting in over-reporting of area in "Greenhouse flowers" and "Greenhouse vegetables".

3. 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".

Source: Statistics Canada, Census of Agriculture. Tables 32-10-0419-01, 32-10-0420-01 and 32-10-0421-01

1.2. Area of Canadian ornamental farms by sub-sector (hectares)

	2011	2016	Change
Floriculture	859	793	-7.7%
Nursery ¹	24,146	19,859	-17.8%
Sod	25,684	22,953	-10.6%
Christmas trees	28,315	23,787	-16.0%
Total	79,004	67,392	-14.7%

Note:

1. 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".

Source: Statistics Canada, Census of Agriculture. Tables 32-10-0419-01, 32-10-0420-01 and 32-10-0421-01



1.3. Area per farm (average) of Canadian ornamental farms by sub-sector (hectares)

	2011	2016	Change
Floriculture	0.28	0.33	15.8%
Nursery ¹	7.02	7.14	1.7%
Sod	68.49	86.62	26.5%
Christmas trees	11.89	12.71	6.9%
Total	8.58	9.21	7.3%

Note:

1. 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".

Source: Statistics Canada, Census of Agriculture. Tables 32-10-0419-01, 32-10-0420-01 and 32-10-0421-01

1.4. Operations, area and months of operation for specialized greenhouse flowers and plants¹

	Total greenhouse operations (number)	Total greenhouse area (square metres)	Total months of operation (number)
2014	1,940	7,899,309	19,300
2015	1,872	7,996,415	17,147
2016	1,811	7,601,836	15,927
2017	1,703	7,353,127	14,855
2018	1,651	7,260,444	14,143

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 greenhouse area, production, sales, labour and expenses variables.

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



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

	2014	2015	2016	2017	2018
Atlantic provinces	299,056	280,201	257,890	260,182	250,972
Quebec	1,233,623	1,220,000	1,213,584	1,181,037	1,178,262
Ontario	3,509,557	3,656,452	3,729,701	3,480,642	3,417,170
Prairie provinces	862,062	863,731	767,503	837,687	845,580
British Columbia	1,995,011	1,976,031	1,614,579	1,584,010	1,568,459
Canada	7,899,309	7,996,415	7,601,836	7,353,127	7,260,444

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

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

	2014	2015	2016	2017	2018
Bedding plants, ornamental	527.65	478.30	469.58	457.46	441.54
Cut flowers	317.65	314.37	306.31	291.34	296.32
Potted plants ¹	192.06	217.19	216.38	209.26	219.56
Cuttings	97.22	98.34	89.74	87.91	84.61
Total	1134.58	1108.20	1082.02	1045.98	1042.04

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



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

	2014	2015	2016	2017	2018
African violets, indoor	5,717	8,937	7,278	3,833	4,377
Argyranthemum, outdoor	416	410	299	319	251
Azaleas, indoor	1,201	1,131	930	611	656
Begonias, outdoor	6,288	6,880	6,708	6,135	6,088
Calibrachos, outdoor	..	..	2,624	2,373	2,310
Chrysanthemums, indoor	7,905	7,457	6,335	6,037	8,406
Chrysanthemums, outdoor	3,904	4,018	3,630	3,660	2,969
Cyclamens, indoor	1,820	2,340	1,925	1,719	2,243
Dahlia, outdoor	..	..	983	974	901
Fine herb plants, outdoor	..	..	10,698	12,561	12,321
Geraniums, outdoor	19,123	18,784	16,472	15,633	15,680
Gerberas, indoor	4,739	5,042	4,230	4,171	4,445
Hawker's balsams, outdoor	3,596	4,121	3,889	3,977	4,067
Heliopsis, outdoor	..	..	67	42	48
Herbaceous flowering perennials, outdoor	10,979	11,692	8,130	7,960	8,323
Indoor hanging pots	899	1,505	1,275	940	1,212
Kalanchoes, indoor	7,267	8,464	8,024	7,178	9,412
Lilies, indoor	3,251	5,845	3,495	2,811	3,121
Miniature roses, indoor	9,552	10,184	10,318	10,214	9,555
Orchids, indoor	2,797	3,137	2,115	3,036	3,170
Outdoor hanging pots	12,637	12,762	12,896	11,433	11,689
Pansies, outdoor	..	..	1,456	1,619	1,680
Petunias, outdoor	7,335	8,409	6,923	6,878	5,572
Poinsettias, indoor	7,141	7,222	6,451	5,690	5,919
Primulas, indoor	1,874	2,396	3,078	2,291	1,960
Rudbeckias, outdoor	..	..	147	190	180
Tropical foliage and green plants	8,110	11,435	11,425	15,557	15,279
Tulips, indoor	1,862	2,321	2,090	2,158	2,216
Vegetable plants, outdoor	..	..	7,227	9,714	10,399
Verbenas, outdoor	..	..	821	1,130	833
Zinnias, outdoor	..	..	345	305	254
Other indoor pots	17,337	17,962	15,597	13,241	15,281
Other outdoor pots	46,305	54,736	48,503	44,872	48,745
Total potted plants	192,055	217,189	216,382	209,260	219,561

Note:

.. : Not available for a specific reference period.

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



1.8. Production of cuttings by variety (number in thousands)

	2014	2015	2016	2017	2018
Chrysanthemums, cuttings	4,708	3,926	3,897	4,115	4,001
Geraniums, cuttings	10,999	13,651	14,095	12,318	11,316
Impatiens, cuttings	4,447	4,578	4,809	4,153	3,821
Poinsettias, cuttings	3,885	4,494	5,424	5,159	5,046
Other cuttings	73,183	71,692	61,519	62,164	60,429
Total cuttings	97,223	98,342	89,744	87,910	84,614

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

1.9. Production of cut flowers¹ by variety (number in thousands)

	2014	2015	2016	2017	2018
Alstroemerias, stems	10,732	12,250	8,964	7,491	5,756
Chrysanthemums, stems	32,470	33,562	25,377	23,142	21,773
Daffodils, stems	6,618	4,061	3,746	2,623	2,760
Freesias, stems	4,592	4,576	5,821	5,979	4,746
Gerberas, stems	74,284	75,229	87,778	81,079	80,320
Irises, stems	4,638	3,239	x	1,834	2,033
Lilies, stems	9,223	9,745	11,557	9,999	12,115
Lisianthus, stems	2,456	5,499	5,793	5,440	4,017
Roses, stems	5,944	5,388	x	4,417	3,557
Snapdragons, stems	13,835	12,146	23,772	18,864	20,729
Tulips, stems	117,567	120,021	111,177	119,132	124,903
Other cut flowers	35,289	28,657	16,485	11,341	13,618
Total cut flowers	317,648	314,373	306,315	291,342	296,324

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



1.10. Total sod area by province (hectares)

	2014	2015	2016	2017	2018
Newfoundland and Labrador	233	276	x	x	254
Prince Edward Island	x	x	x	x	70
Nova Scotia	1,085	1,142	999	975	965
New Brunswick	318	x	401	467	427
Quebec	4,711	5,129	4,821	4,237	4,035
Ontario	10,894	9,232	9,105	8,624	7,927
Manitoba	x	1,182	780	749	786
Saskatchewan	614	654	613	564	622
Alberta	4,234	4,061	4,065	3,714	3,589
British Columbia	862	849	811	859	827
Canada	24,225	22,914	21,915	20,522	19,500

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

1.11. Sod operations¹ by province (number)

	2014	2015	2016	2017	2018
Newfoundland and Labrador	20	20	20	23	21
Prince Edward Island	3	2	x	4	3
Nova Scotia	10	10	9	10	11
New Brunswick	9	9	x	9	10
Quebec	62	58	60	61	58
Ontario	80	65	65	65	65
Manitoba	10	10	10	10	11
Saskatchewan	10	9	9	8	9
Alberta	30	30	26	26	32
British Columbia	40	30	30	30	30
Canada	274	243	240	246	250

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



1.12. Christmas tree production by province (number of farms)

	2011	2016
Newfoundland and Labrador	19	11
Prince Edward Island	20	18
Nova Scotia	447	319
New Brunswick	157	97
Quebec	379	343
Ontario	647	530
Manitoba	60	39
Saskatchewan	41	31
Alberta	105	83
British Columbia	506	401
Canada	2,381	1,872

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

1.13. Christmas tree production by province (hectares)

	2011	2016
Newfoundland and Labrador	116	71
Prince Edward Island	140	134
Nova Scotia	7,663	6,179
New Brunswick	2,131	1,785
Quebec	8,347	8,255
Ontario	5,955	4,456
Manitoba	472	178
Saskatchewan	305	265
Alberta	565	449
British Columbia	2,621	2,016
Canada	28,315	23,787

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



2. Sales and resales

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

	2014	2015	2016	2017	2018
Greenhouse flower and plants	1,443.0	1,506.0	1,510.2	1,503.9	1,556.7
Nursery ¹	747.2	759.5	670.5	659.5	643.5
Sod	162.4	157.0	146.8	147.3	140.4
Total	2,190.1	2,422.5	2,327.4	2,310.7	2,340.6

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 and 32-10-0034-01

2.2. Greenhouse flower and plant sales by category (millions of Canadian dollars)

	2014	2015	2016	2017	2018
Potted plants ¹	706.4	785.9	811.6	789.7	830.5
Bedding plants, ornamental	190.9	179.8	192.2	204.2	205.0
Cut flowers	150.1	146.6	140.1	127.8	133.3
Cuttings	51.6	49.9	44.2	44.8	44.2
Total	1,098.9	1,162.1	1,188.0	1,166.5	1,213.0

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



2.3. Greenhouse flower and plant sales and resales¹ by province (millions of Canadian dollars)

	2014	2015	2016	2017	2018
Newfoundland and Labrador	9.2	8.1	x	8.7	8.6
Prince Edward Island	5.3	5.1	x	5.5	5.6
Nova Scotia	16.1	13.4	17.0	13.0	12.7
New Brunswick	34.6	37.9	x	44.3	45.2
Quebec	161.5	163.8	177.0	192.6	216.3
Ontario	757.6	795.4	790.5	774.9	797.5
Manitoba	34.4	F	33.6	33.4	35.2
Saskatchewan	17.2	16.0	13.2	10.9	12.1
Alberta	85.9	78.9	77.3	76.9	80.2
British Columbia	321.1	352.8	343.8	343.9	343.4
Canada	1,443.0	1,506.0	1,510.2	1,503.9	1,556.7

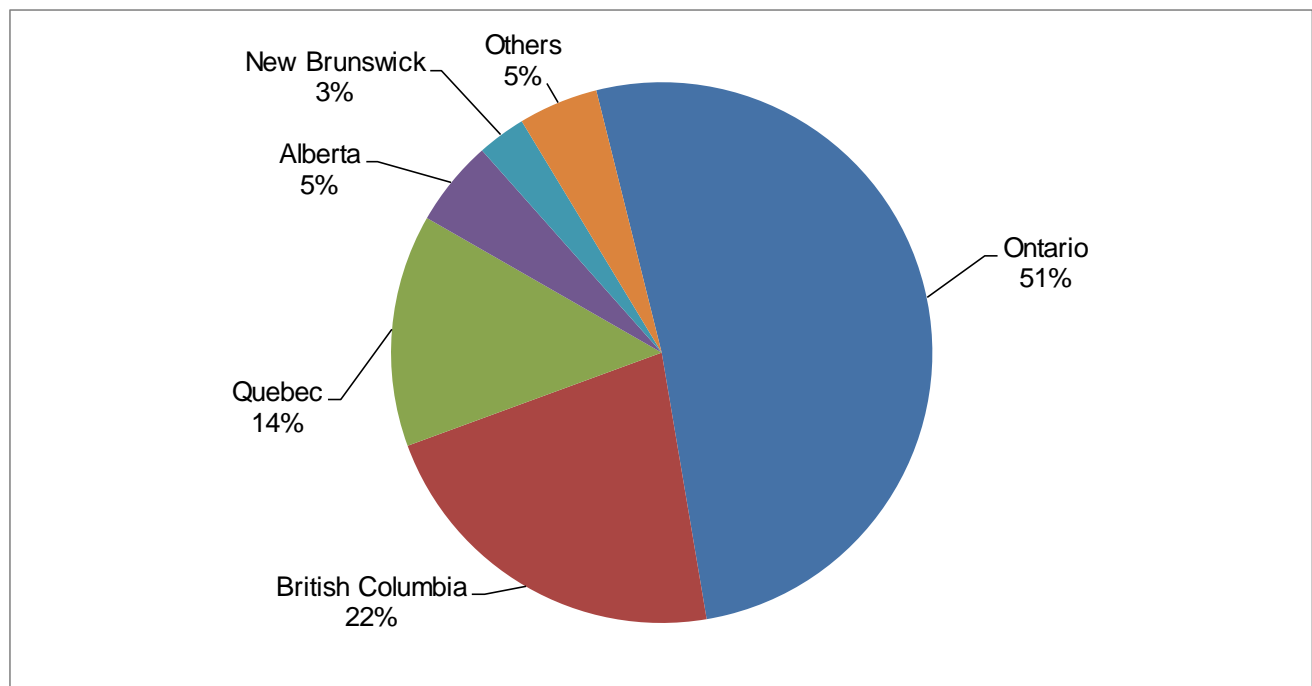
Notes:

F: Too unreliable to be published.

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. Greenhouse flower and plant sales and resales by province – percent share, 2018



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



2.5. Nursery stock¹ sales and resales by province (millions of Canadian dollars)

	2014	2015	2016	2017	2018
Newfoundland and Labrador	0.6	x	x	x	0.8
Prince Edward Island	2.0	x	x	x	0.9
Nova Scotia	10.6	12.1	10.6	10.5	10.7
New Brunswick	4.7	5.6	3.5	3.2	3.3
Quebec	101.8	106.0	89.4	87.7	86.1
Ontario	309.1	312.3	303.6	290.4	269.9
Manitoba	15.2	14.8	15.2	14.4	15.5
Saskatchewan	7.1	8.1	5.1	6.2	5.2
Alberta	57.9	55.6	47.0	47.2	48.4
British Columbia	238.2	243.0	194.3	198.1	202.6
Canada	747.2	759.5	670.5	659.5	643.5

Notes:

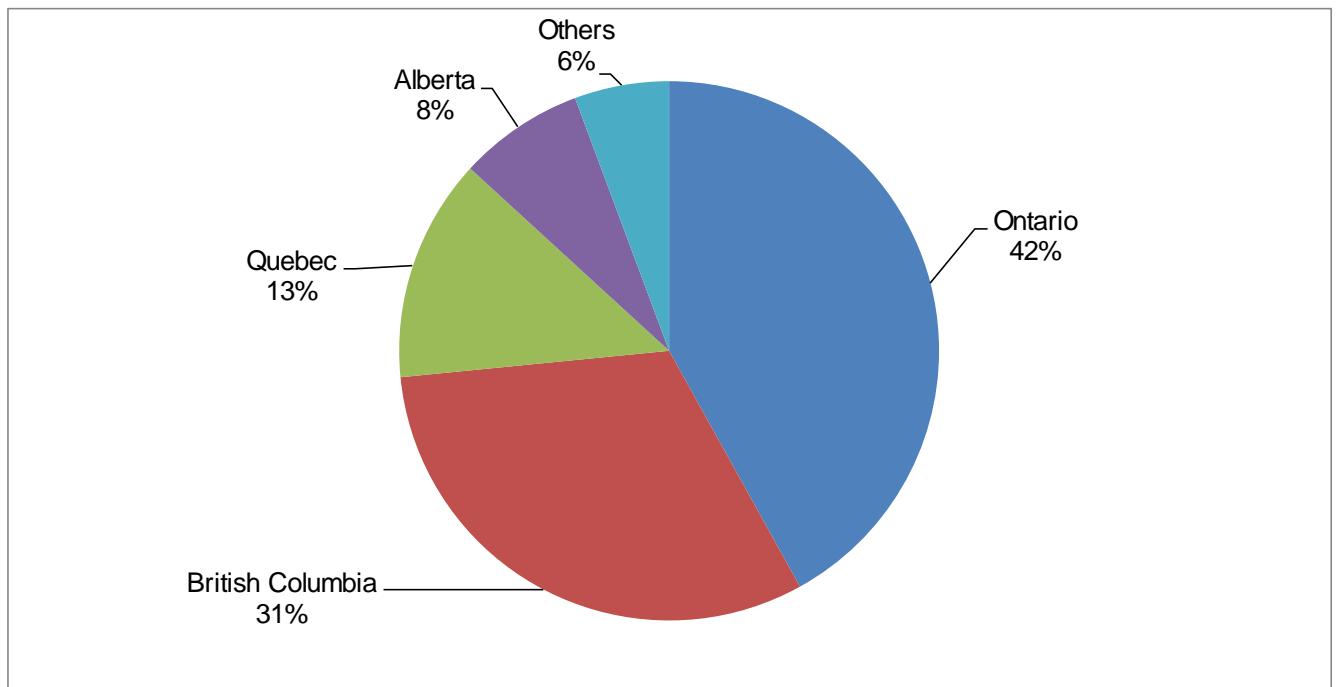
1. The term "nursery stock" covers a diverse range of non-edible, living plant material grown in field or in containers and sold with its root system intact. Nursery stock includes annual and perennial plants ranging from woody plants (e.g. trees, shrubs and rose bushes) to bedding plants and potted 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. Nursery stock sales and resales by province – percentage share, 2018



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

2.7. Nursery stock resales by province (millions of Canadian dollars)

	2014	2015	2016	2017	2018
Newfoundland and Labrador	x	x	0.3	0.5	x
Prince Edward Island	x	x	x	0.0	x
Nova Scotia	2.1	1.2	0.8	0.8	0.9
New Brunswick	F	1.0	1.0	1.0	x
Quebec	16.0	15.0	16.5	17.1	15.2
Ontario	71.4	72.3	81.3	72.1	72.0
Manitoba	2.0	2.6	2.2	1.8	1.5
Saskatchewan	1.8	2.3	1.8	2.5	1.8
Alberta	7.3	9.5	8.8	7.4	8.8
British Columbia	31.4	29.2	27.1	28.4	29.0
Canada¹	133.3	133.5	139.9	131.6	131.0

Notes:

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

F: Too unreliable to be published.

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

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



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

	2014	2015	2016	2017	2018
Newfoundland and Labrador	2.5	x	2.7
Prince Edward Island	x	x	.6
Nova Scotia	3.5	4.1	3.9
New Brunswick	x	3.0	2.7
Quebec	31.8	29.7	29.3
Ontario	56.9	59.1	54.5
Manitoba	4.6	4.3	4.1
Saskatchewan	4.4	3.9	4.3
Alberta	28.6	27.8	26.6
British Columbia	11.4	12.0	11.5
Canada	146.8	147.3	140.4

Notes:

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

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

.. : Not available for a specific reference period.

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



3. Channels of distribution

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

	2014	2015	2016	2017	2018
Mass market chain stores	446.9	451.8	476.1	488.7	476.9
Domestic wholesalers	269.3	289.6	278.8	283.1	305.9
Direct sales to the public ¹	221.6	215.7	224.1	201.4	220.2
Retail florists	184.4	191.4	171.1	165.7	182.9
Other greenhouses	137.1	167.8	161.2	175.2	160.6
Exported	118.5	123.2	144.4	141.9	159.6
Government and public agencies	20.4	20.2	13.1	11.6	12.2
Other channels	44.7	46.4	41.3	36.2	38.5
Total sales²	1,443.0	1,506.0	1,510.2	1,503.9	1,556.7

Notes:

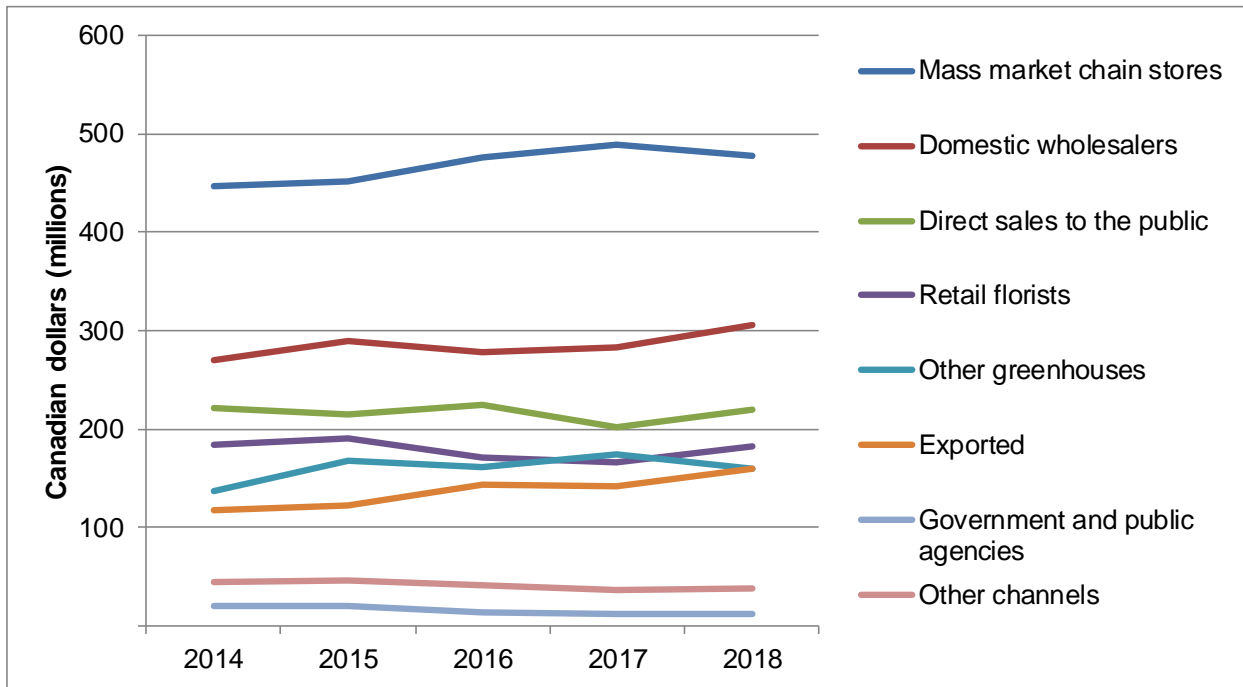
1. Includes roadside stands and owner-operated retail outlets.

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



3.2. Channels of distribution for flowers and plant sales and resales, 2014–2018



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

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

	2014	2015	2016	2017	2018
Landscape contractors	173.4	171.2	177.1	182.4	168.2
Garden centres	140.3	141.1	130.8	122.3	114.1
Mass market chain stores	112.1	123.8	107.8	100.7	103.5
Direct sales to the public ¹	81.3	79.0	75.1	89.4	92.3
Other growers	66.0	69.6	79.4	75.2	73.8
Exported	17.8	29.6	22.2	25.7	28.7
Government and public agencies	53.0	54.9	31.2	23.9	22.4
Fruit growers	34.3	34.4	22.9	20.2	19.7
Other channels	68.9	55.8	24.0	19.9	20.7
Total sales²	747.2	759.5	670.5	659.5	643.5

Notes:

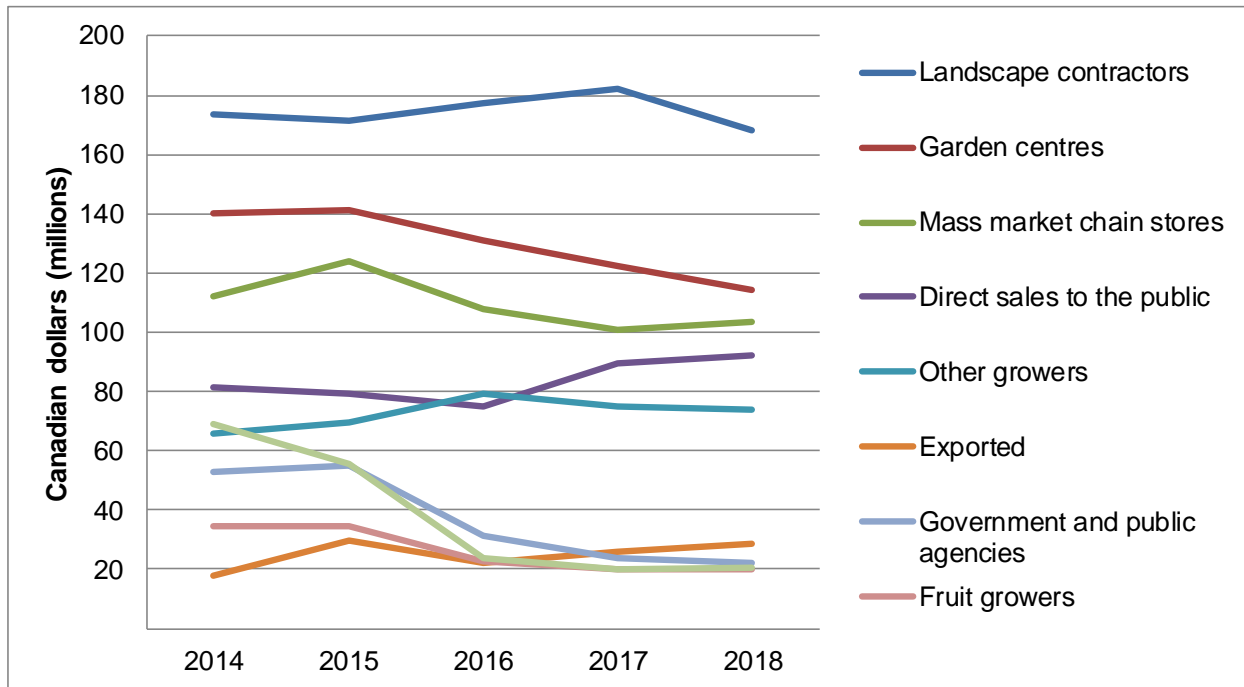
1. Includes roadside stands and owner-operated retail outlets.

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



3.4. Channels of distribution for nursery product sales and resales, 2014–2018



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



4. Operating expenses

4.1. Greenhouse flower and plant¹ producers' operating expenses by category (millions of Canadian dollars)

	2014	2015	2016	2017	2018
Gross yearly payroll ²	338.7	339.7	322.6	294.7	291.4
Plant material purchases for growing on ³	211.1	221.2	216.0	219.9	213.4
Plant material purchases for resale ³	135.0	127.5	114.4	113.2	112.0
Fuel	66.0	61.5	55.3	54.2	57.7
Electricity ⁴	26.9	27.7	28.9	25.8	26.0
Other crop expenses ⁵	107.7	124.4	141.2	156.8	151.8
Other operating expenses ⁶	215.4	211.8	208.5	183.2	178.7
Total operating expenses⁷	1,100.8	1,113.7	1,086.8	1,047.9	1,031.0

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. Electricity expenses include electricity for lighting, airflow fans, and heating.
5. Includes fertilizer, pesticides, pollination, irrigation, containers, packaging, bioprograms, and growing mediums such as soil, peat moss, vermiculite, perlite, sand, Styrofoam and sawdust.
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

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

	2014	2015	2016	2017	2018
Atlantic provinces	53.8	55.0	52.0	54.6	54.9
Quebec	124.1	114.1	119.0	115.8	115.7
Ontario	566.5	597.8	614.7	606.4	591.8
Prairie provinces	108.3	94.9	79.3	81.4	88.5
British Columbia	248.0	251.8	221.7	190.6	180.1
Canada	1,100.8	1,113.7	1,086.8	1,047.9	1,031.0

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



4.3. Nursery operating expenses by category (millions of Canadian dollars)

	2014	2015	2016	2017	2018
Gross yearly payroll ¹	235.7	233.8	201.6	197.2	189.8
Plant material purchases for growing on ²	92.1	91.3	96.4	97.2	95.9
Plant material purchases for resale ²	87.9	90.0	98.4	94.3	92.7
Electricity expenses	..	..	5.7	4.6	5.1
Other crop expenses ³	..	..	60.5	62.2	64.3
Other operating expenses ⁴	236.4	227.6	115.5	110.1	113.4
Total Operating Expenses	652.1	642.7	578.2	565.6	561.2

Notes:

1. Includes seasonal and permanent labour.

2. Includes value of trees, nursery stock, bedding plants, seedlings, cuttings or bulbs purchased before sales tax.

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

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

.. : Not available for a specific reference period.

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

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

	2014	2015	2016	2017	2018
Newfoundland and Labrador	0.6	0.5	x	x	0.8
Prince Edward Island	1.5	1.3	x	x	0.9
Nova Scotia	10.1	11.1	10.2	10.2	10.7
New Brunswick	4.7	5.5	3.5	3.4	3.0
Quebec	91.3	95.6	78.3	78.2	75.5
Ontario	275.9	268.5	272.6	257.8	250.2
Manitoba	13.2	13.8	13.0	12.7	13.1
Saskatchewan	6.4	6.4	4.1	4.8	4.6
Alberta	51.1	50.4	41.5	42.1	40.5
British Columbia	197.3	189.7	153.4	154.7	162.1
Canada	652.1	642.7	578.2	565.6	561.2

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



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

	2014	2015	2016	2017	2018
Gross yearly payroll ¹	47.3	45.6	40.8	38.9	37.4
Sod purchases for resale	2.6	1.8	1.4	2.7	2.5
Other operating expenses ²	84.2	78.3	75.1	71.7	65.8
Total operating expenses³	134.1	125.6	117.4	113.3	105.7

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. Data 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

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

	2014	2015	2016	2017	2018
Newfoundland and Labrador	2.1	2.4	2.0	x	2.0
Prince Edward Island	x	x	x	x	0.4
Nova Scotia	4.8	x	3.8	3.9	4.0
New Brunswick	x	1.1	x	2.5	2.2
Quebec	27.4	26.9	24.5	23.7	22.1
Ontario	62.3	51.0	46.4	45.0	41.8
Manitoba	4.2	4.6	3.0	2.9	2.8
Saskatchewan	3.8	3.6	3.6	3.2	3.3
Alberta	19.5	21.6	22.0	18.8	17.2
British Columbia	8.4	9.8	9.9	10.5	9.9
Canada¹	134.1	125.6	117.4	113.3	105.7

Notes:

1. Data 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



5. Labour

5.1. Nursery, sod and greenhouse flowers total employees

		2014	2015	2016	2017	2018
Nursery	Seasonal employees ¹	9,841	9,643	7,896	7,184	6,806
	Permanent employees ²	4,046	3,862	3,560	3,331	3,048
	Total employees	13,887	13,505	11,456	10,515	9,854
Sod	Seasonal employees ¹	1,287	1,225	1,117	1,140	1,072
	Permanent employees ²	509	480	461	428	392
	Total employees	1,796	1,705	1,578	1,568	1,464
Specialized greenhouse flowers and plants	Seasonal employees ¹	12,315	11,867	10,893	10,195	9,725
	Permanent employees ²	6,796	6,627	6,288	5,691	5,380
	Total employees	19,111	18,494	17,181	15,886	15,105

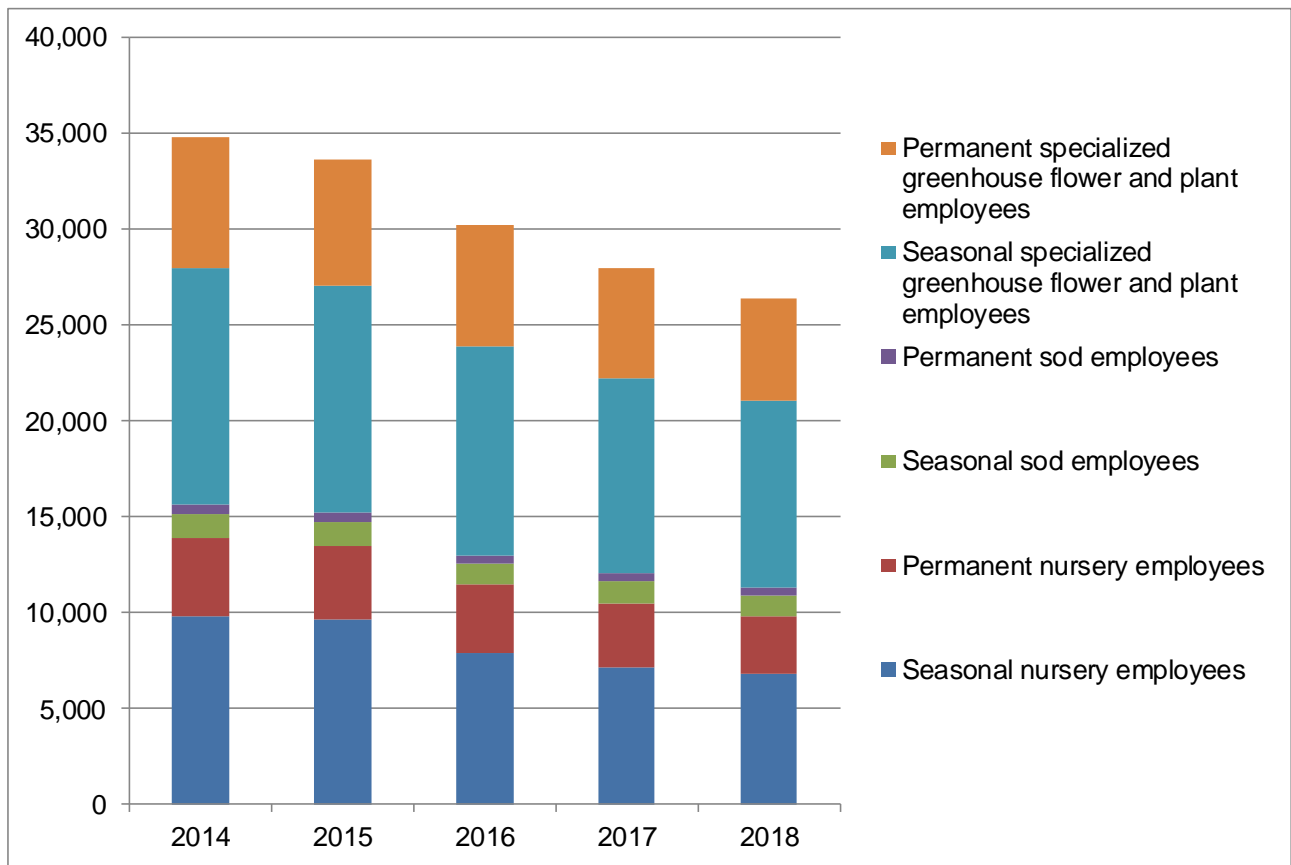
Notes:

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

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



5.2. Total employees by sector, 2014–2018



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



6. Trade

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

		2014	2015	2016	2017	2018
Bulbs, tubers, tuberous roots, etc.	Exports	18,069	19,662	22,195	22,050	21,959
	Imports	51,250	52,589	54,525	53,370	55,895
	Trade balance	-33,181	-32,928	-32,329	-31,320	-33,936
Other live plants, including their roots, cuttings and slips, etc.	Exports	246,122	300,877	321,483	339,499	363,530
	Imports	204,963	231,393	241,080	262,371	275,824
	Trade balance	41,158	69,484	80,403	77,128	87,706
Cut flowers and flower buds for bouquets or ornamental purposes, etc.	Exports	51,054	62,653	75,413	76,140	80,067
	Imports	156,332	168,054	165,028	172,869	170,320
	Trade balance	-105,278	-105,401	-89,615	-96,729	-90,254
Foliage, branches and other parts of plants, etc.¹	Exports	51,179	54,954	57,945	63,034	77,428
	Imports	33,339	36,909	37,766	42,464	45,220
	Trade balance	17,840	18,044	20,179	20,570	32,208
Total	Exports	366,424	438,145	477,037	500,722	542,983
	Imports	445,884	488,945	498,399	531,074	547,259
	Overall trade balance	-79,460	-50,801	-21,362	-30,351	-4,277

Note:

1. Includes Christmas trees.

Source: Statistics Canada (CATSNet, July 2019)



6.2. Exports

6.2.1. Canadian floriculture and nursery exports¹ by province (thousands of Canadian dollars)

	2014	2015	2016	2017	2018
Newfoundland and Labrador	0	0	0	1	7
Prince Edward Island	2,564	3,222	3,667	3,776	4,318
Nova Scotia	16,007	20,472	18,387	18,645	17,670
New Brunswick	32,515	28,895	31,614	30,331	34,374
Quebec	28,405	37,627	39,640	44,837	54,557
Ontario	204,000	249,566	275,071	289,460	312,372
Manitoba	925	1,288	1,361	1,274	1,305
Saskatchewan	49	68	62	134	92
Alberta	189	279	328	163	219
British Columbia	81,770	96,724	106,907	112,102	118,068
Canada²	366,424	438,145	477,037	500,722	542,983

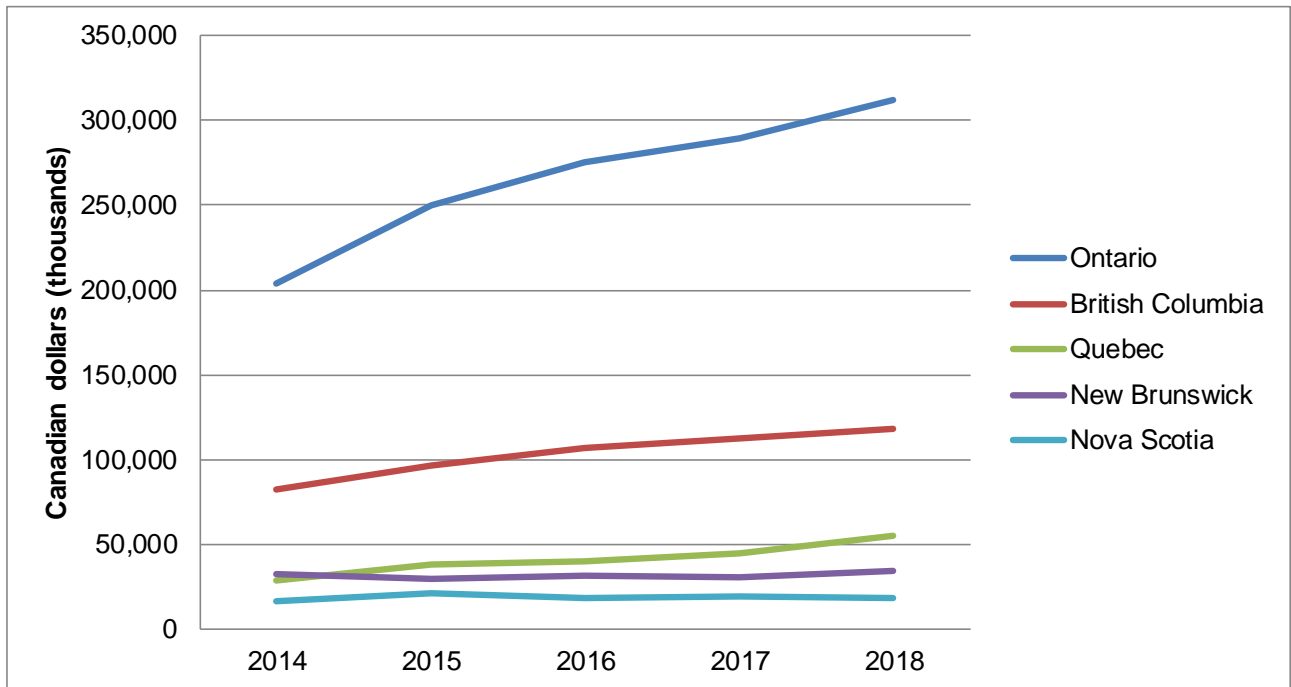
Notes:

1. Includes Christmas trees.
2. Canada total derived from the sum of available provincial data.

Source: Statistics Canada (CATSNet, July 2019)

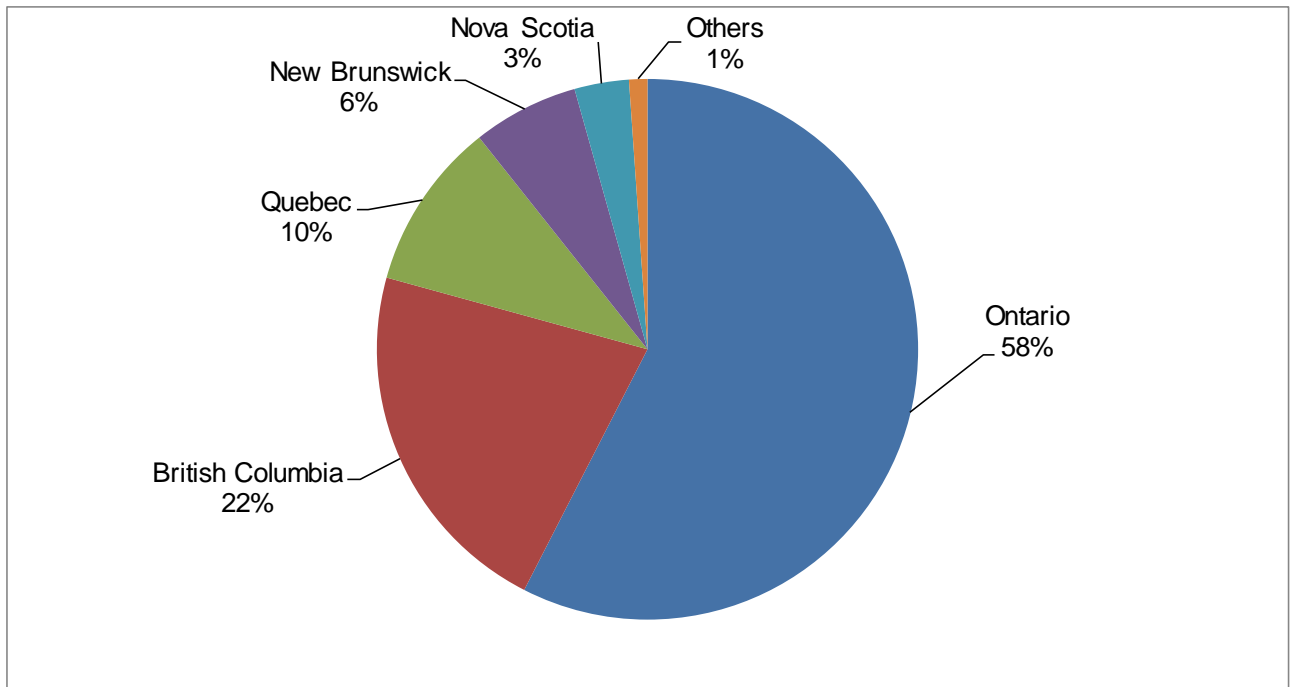


6.2.2. Floriculture and nursery exports by province, 2014–2018



Source: Statistics Canada (CATSNet, July 2019)

6.2.3. Floriculture and nursery exports by province – percent share, 2018



Source: Statistics Canada (CATSNet, July 2019)



6.2.4. Canada's top ten floriculture and nursery¹ export destinations (thousands of Canadian dollars)

	2014	2015	2016	2017	2018
United States	361,859	431,542	472,923	496,826	539,350
Panama	1,417	3,343	1,738	1,901	1,683
Curaçao	301	241	416	430	286
Bermuda	257	219	265	244	265
Aruba	146	136	218	226	255
Mexico	32	34	115	0	144
Japan	19	253	205	140	141
Denmark	0	0	0	0	96
Barbados	84	100	99	108	94
United Arab Emirates	23	52	148	87	93
Others	2,286	2,225	910	759	577
Total	366,424	438,145	477,037	500,722	542,983

Note:

1. Includes Christmas trees.

Source: Statistics Canada (CATSNet, July 2019)



6.2.5. Christmas tree exports by province¹ (thousands of Canadian dollars)

	2014	2015	2016	2017	2018
Prince Edward Island	15	18	0	0	0
Nova Scotia	6,002	8,628	7,208	7,072	6,701
New Brunswick	8,522	7,903	7,894	7,297	11,233
Quebec	17,751	24,373	27,426	34,157	43,848
Ontario	228	473	474	863	649
Manitoba	0	0	0	0	9
Saskatchewan	41	21	34	9	24
British Columbia	18	22	53	9	686
Canada	32,576	41,438	43,090	49,406	63,150

Note:

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

Source: Statistics Canada (CATSNet, July 2019)

6.2.6. Christmas tree exports by province¹ (number)

	2014	2015	2016	2017	2018
Prince Edward Island	550	590	0	0	0
Nova Scotia	375,160	365,095	353,586	317,438	280,512
New Brunswick	267,255	266,669	298,425	250,557	314,687
Québec	865,279	1,061,691	1,265,217	1,666,198	1,624,998
Ontario	13,904	21,699	23,491	34,486	25,040
Manitoba	0	0	0	0	851
Saskatchewan	4,334	1,665	2,412	695	1,425
British Columbia	2,965	2,326	9,358	713	25,597
Canada	1,529,447	1,719,735	1,952,489	2,270,087	2,273,110

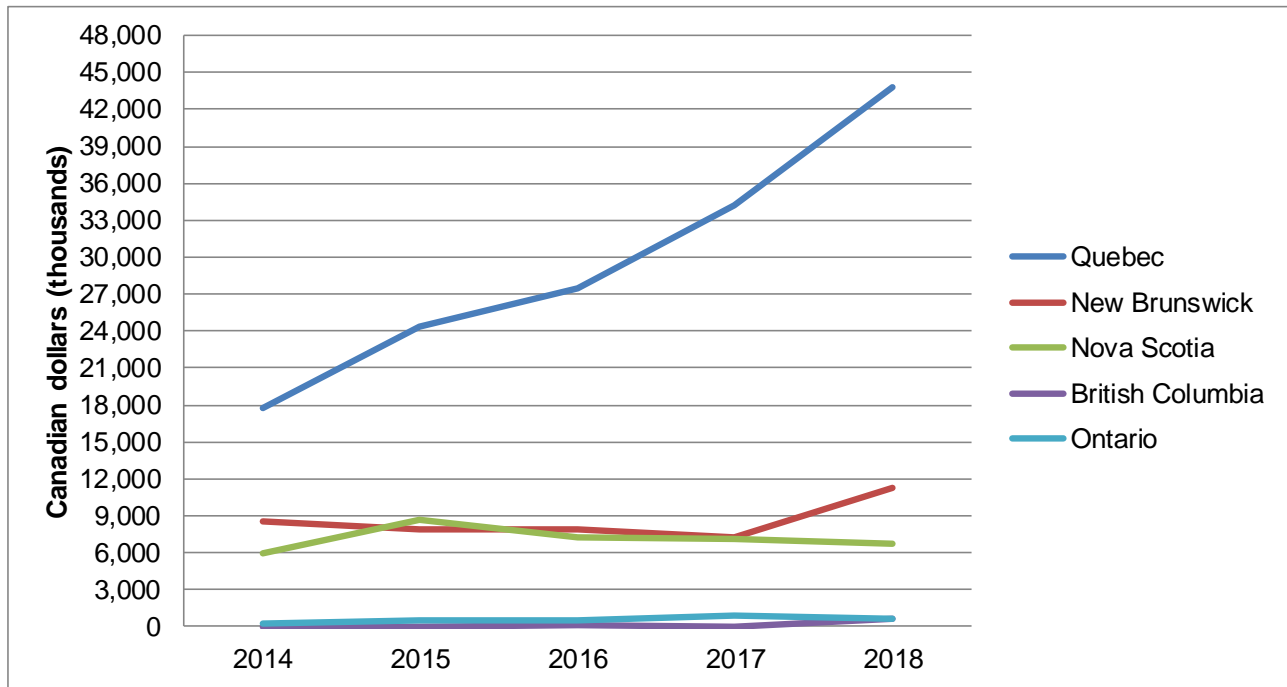
Note:

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

Source: Statistics Canada (CATSNet, July 2019)



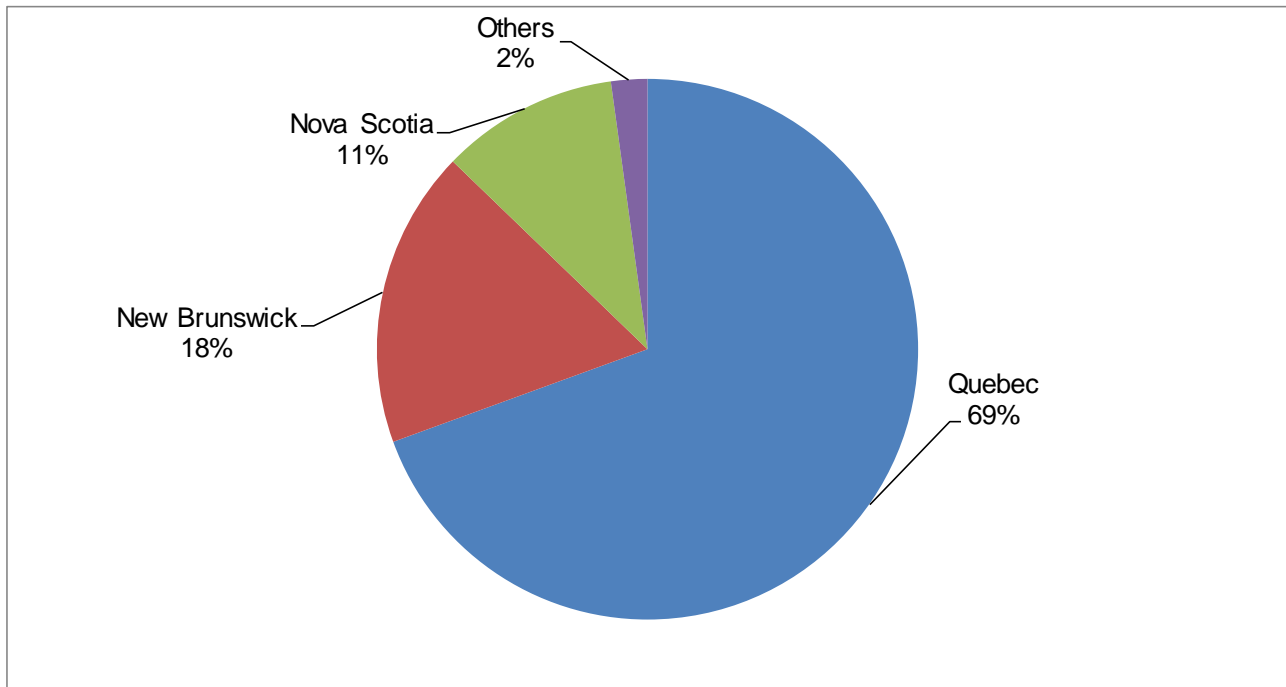
6.2.7. Christmas tree exports by province, 2014–2018



Source: Statistics Canada (CATSNet, July 2019)



6.2.8. Christmas tree exports by province – percentage share, 2018



Source: Statistics Canada (CATSNet , July 2019)

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

	2014	2015	2016	2017	2018
United States	29,822	36,666	39,662	46,043	60,224
Panama	1,417	3,343	1,738	1,901	1,683
Curaçao	301	241	416	430	286
Aruba	146	136	218	226	255
Bermuda	257	219	264	242	243
United Arab Emirates	23	52	148	87	93
Barbados	57	79	82	88	74
Sint Maarten (Dutch part)	73	60	82	53	57
Bahamas	45	33	22	34	55
Cayman Islands	27	29	29	73	52
Others	409	580	429	227	128
Total	32,576	41,438	43,090	49,406	63,150

Source: Statistics Canada (CATSNet, August 2019)



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

	2014	2015	2016	2017	2018
United States	1,477,761	1,634,249	1,866,218	2,206,996	2,203,756
Panama	22,971	53,283	51,133	32,057	35,690
Curaçao	6,838	4,407	7,680	7,856	5,975
Bermuda	5,375	4,921	5,466	6,321	5,708
Aruba	2,243	2,270	4,189	3,963	4,676
United Arab Emirates	360	1,364	3,921	1,906	2,220
Barbados	1,123	1,482	1,620	1,745	1,935
Cayman Islands	653	660	1,022	1,624	1,419
Bahamas	895	766	333	955	1,216
Sint Maarten (Dutch part)	1,734	924	1,572	1,148	872
Others	9,494	15,409	9,335	5,516	2,861
Total	1,529,447	1,719,735	1,952,489	2,270,087	2,266,328

Source: Statistics Canada (CATSNet, August 2019)

6.2.11. Canada's floriculture and nursery¹ export destinations by U.S. state (thousands of Canadian dollars)

	2014	2015	2016	2017	2018
New York	45,220	51,935	59,799	64,505	68,115
Washington, state	28,619	33,702	40,375	43,009	44,095
Florida	22,746	33,916	31,400	30,236	36,013
Michigan	19,819	28,058	28,805	30,244	32,657
Massachusetts	28,603	31,170	33,102	32,827	31,770
California	16,870	18,565	25,362	28,609	30,610
Illinois	20,700	24,360	23,019	25,588	29,520
Pennsylvania	19,803	22,269	22,471	20,632	26,729
Maine	20,154	23,486	24,252	24,838	25,338
Ohio	14,051	16,302	17,790	21,844	22,691
Other U.S. States	125,275	147,779	166,546	174,495	191,802
Total, United States	361,859	431,542	472,923	496,826	539,341

Note:

1. Includes Christmas trees.

Source: Statistics Canada (CATSNet, August 2019)



6.3. Imports

6.3.1. Floriculture and nursery¹ imports by province (thousands of Canadian dollars)

	2014	2015	2016	2017	2018
Newfoundland and Labrador	137	117	101	106	129
Prince Edward Island	7	6	10	4	0
Nova Scotia	1,229	1,302	1,459	1,627	1,839
New Brunswick	6,123	6,280	6,215	7,314	8,405
Quebec	58,213	61,321	66,070	64,910	59,996
Ontario	231,555	254,559	262,907	289,971	306,083
Manitoba	35,596	33,809	32,159	27,662	30,331
Saskatchewan	2,540	5,764	5,877	2,947	4,201
Alberta	7,355	7,222	7,687	15,307	11,238
British Columbia	103,129	118,565	115,915	121,226	125,035
Canada	445,884	488,945	498,399	531,074	547,258
Note:					
1. Includes Christmas trees.					
Source: Statistics Canada (CATSNet, August 2019)					

6.3.2. Top ten sources of Canada's floriculture and nursery¹ imports (thousands of Canadian dollars)

	2014	2015	2016	2017	2018
United States	206,689	227,716	230,182	251,838	261,500
Colombia	91,996	98,089	103,526	111,072	111,380
Netherlands	52,201	53,640	55,923	58,827	61,718
Ecuador	41,942	45,503	39,015	37,764	36,525
Mexico	6,082	7,391	8,495	8,719	10,594
Taiwan	4,510	6,606	6,780	6,660	8,280
Guatemala	3,568	4,119	5,726	6,289	7,522
Costa Rica	6,056	7,092	6,197	5,458	5,548
Israel	4,878	4,896	4,581	5,624	5,409
India	2,173	3,317	3,473	3,851	4,164
Others	25,789	30,577	34,500	34,972	34,619
Total	445,884	488,945	498,399	531,074	547,258
Note:					
1. Includes Christmas trees.					
Source: Statistics Canada (CATSNet, August 2019)					



7. World data

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

	2014	2015	2016	2017	2018
Netherlands	12,162,476	11,844,251	12,851,550	13,198,359	14,135,998
Colombia	1,527,707	1,665,208	1,758,789	1,846,648	1,913,830
Germany	1,235,920	1,195,246	1,344,479	1,335,156	1,468,109
Italy	988,773	973,549	1,113,879	1,212,402	1,367,968
Ecuador	885,859	1,048,778	1,071,972	1,159,629	1,110,364
Belgium	994,081	754,075	799,354	783,256	917,653
Kenya	697,890	684,999	750,210	787,804	815,550
Denmark	667,243	593,382	633,217	642,251	643,143
Spain	440,963	400,736	476,963	530,577	625,139
United States	466,089	523,056	566,164	583,930	595,165
Others ¹	4,104,771	4,447,329	4,765,264	4,927,859	5,255,125
Total	24,171,773	24,130,608	26,131,839	27,007,872	28,848,045

Note:

1. In 2018, Canada ranked 11th globally with exports totaling \$549,090 thousands.

Source: Global Trade Tracker (August 2019)

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

	2014	2015	2016	2017	2018
Germany	3,898,897	3,747,037	4,082,219	4,103,897	4,391,935
Netherlands	2,469,744	2,963,053	3,166,446	3,275,447	3,491,756
United States	2,176,195	2,559,786	2,874,627	2,969,817	3,146,608
United Kingdom	2,034,611	2,084,464	2,128,309	2,013,124	2,078,718
France	1,457,999	1,416,869	1,544,027	1,579,549	1,695,946
Italy	731,781	758,776	795,777	824,419	793,542
Japan	666,928	709,944	773,311	758,318	786,886
Russian Federation	938,647	917,371	766,489	739,964	774,508
Switzerland	704,681	692,001	733,054	730,484	769,641
Belgium	752,283	504,559	589,458	569,031	656,055
Others ¹	5,984,907	6,321,389	6,822,445	7,460,260	8,257,675
Total	21,816,674	22,675,250	24,276,162	25,024,310	26,843,268

Note:

1. In 2018, Canada ranked 14th globally with imports totaling \$547,250 thousands.

Source: Global Trade Tracker (August 2019)



8. Key Resources

Global Trade Tracker

Statistics Canada. Table 32-10-0419-01 Nursery and sod

Statistics Canada. Table 32-10-0420-01 Greenhouse products and mushrooms

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.