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Statistical Overview of the Canadian Ornamental Industry 2019

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 2019, the sector generated farm gate sales of \$2.38 billion, including resales by producers, a 1% increase from 2018.

Floriculture (greenhouse flowers and potted plants) remained the largest ornamental sub-sector by revenue, accounting for 65.8% of total sales. Floriculture sales have been relatively stable over the last 5 years, totaling \$1.57 billion in 2019, compared to \$1.51 billion in 2015. 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 52.2%.

Nursery product sales and resales were up 2.9% to \$679.6 million in 2019, accounting for 28.6% of total ornamental sales. By province, Ontario accounted for 41.0% of total nursery sales in 2019, followed by British Columbia and Quebec with 33.6% and 13.3%, respectively.

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, a trend seen across agriculture. The next Census of Agriculture will be conducted in 2021. The nursery industry is typically more vertically integrated than the floriculture industry with a combination of retail sales (garden centres), landscaping, installation and maintenance services forming part of the income mix for many producers.

Total turf sod area decreased 3.4% to 18,667 hectares in 2019, with sales and resales down 4.4% to \$133.6 million, accounting for 5.6% of total ornamental sales. Ontario led the country in turf sod sales at 39.7% 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 27.4% of total sales in 2019. However, landscape contractors and garden centres are the two largest distribution channels for nursery products, making up 25.6% and 17.1% of total sales, respectively.

In 2019, 25,275 people were directly employed in the production of ornamental products; 56.5% of these employees worked in specialized greenhouse flower and plant operations, 37.5% in nurseries, and 6.1% 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. 64.5% of greenhouse flower and plant production employees were seasonal workers, while 73.5% of sod workers and 67.01% of nursery workers fell into the seasonal category.

Temporary foreign workers are an essential source of labour for the ornamental horticulture industry. In 2018, there were nearly 18,500 jobs filled by temporary foreign workers in greenhouse (including greenhouse vegetables, specialized flowers and plants), nursery and floriculture production. This suggests that approximately 49% of the total greenhouse, nursery, and floriculture production workforce was comprised of temporary foreign workers.

Canada's largest ornamental trade partner continues to be the United States, accounting for 99.3% of exports and 48.8% of imports in the sector. Canadian worldwide exports rose 15.7% from 2018 to \$627.9 million in 2019, while imports increased 3.7% from 2018 to \$567.3 million in 2019, resulting to a net positive trade balance for the first time since 2005.



Looking ahead to the 2020 season, disruptions in retail operations as well as severe curtailment of travel and transportation options to address the COVID-19 pandemic has negatively affected the industry in Canada. Limited or non-existent travel options for Seasonal and Temporary Foreign Workers prevented or delayed the arrival of the workforce critical to production and distribution of ornamental products early in the Spring. Closures of all or most retail operations in the spring of 2020 resulted in cancelled production orders and very limited retail channels through the critical Easter and Mothers' Day sales periods. When COVID-related restrictions on retailers were eased, consumer demand returned but supplies of many goods were limited by previously cancelled orders for products. More details will be available in the 2020 Statistical Overview of the Canadian Ornamental Industry.

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 to 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 last Census of Agriculture was conducted in 2016. The next Census of Agriculture will occur in 2021.



1. Production

1.1. Number of Canadian ornamental farms^{1,2} by sub-sector

	2011	2016	Change
Floriculture ³	3,016	2,403	-20.3%
Nursery ⁴	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. The last Census of Agriculture was conducted in 2016. The next Census of Agriculture will occur in 2021.

2. 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.

3. 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".

4. 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 farms¹ by sub-sector (hectares)

	2011	2016	Change
Floriculture	859	793	-7.7%
Nursery ²	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%

Notes:

1. The last Census of Agriculture was conducted in 2016. The next Census of Agriculture will occur in 2021.

2. 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 farms¹ by sub-sector (hectares)

	2011	2016	Change
Floriculture	0.28	0.33	15.8%
Nursery ²	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%

Notes:

1. The last Census of Agriculture was conducted in 2016. The next Census of Agriculture will occur in 2021.

2. 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)
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	1,646	7,122,483	14,033
2019	1,591	7,008,729	13,196

Note:

1. Operations which exclusively produce tree seedlings for reforestation are outside the scope since 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)

	2015	2016	2017	2018	2019
Atlantic provinces	280,201	257,890	260,182	251,901	240,421
Quebec	1,220,000	1,213,584	1,181,037	1,178,262	1,239,323
Ontario	3,656,452	3,729,701	3,480,642	3,417,170	3,484,294
Prairie provinces	863,731	767,503	837,687	799,593	735,885
British Columbia	1,976,031	1,614,579	1,584,010	1,475,556	1,308,806
Canada	7,996,415	7,601,836	7,353,127	7,122,483	7,008,729

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)

	2015	2016	2017	2018	2019
Bedding plants, ornamental	478.30	469.58	457.46	441.26	415.74
Cut flowers	314.37	306.31	291.34	296.29	285.40
Potted plants ¹	217.19	216.38	209.26	213.19	208.21
Cuttings	98.34	89.74	87.91	84.61	89.20
Total	1108.20	1082.02	1045.98	1035.35	998.55

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)

	2015	2016	2017	2018	2019
Tropical foliage and green plants	11,435	11,425	15,557	15,279	17,310
Geraniums, outdoor	18,784	16,472	15,633	15,726	13,890
Outdoor hanging pots	12,762	12,896	11,433	11,689	11,878
Herbaceous flowering perennials, outdoor	11,692	8,130	7,960	9,529	11,706
Fine herb plants, outdoor	..	10,698	12,561	12,324	9,976
Kalanchoes, indoor	8,464	8,024	7,178	9,072	9,331
Vegetable plants, outdoor	..	7,227	9,714	9,708	9,330
Miniature roses, indoor	10,184	10,318	10,214	9,555	8,965
Chrysanthemums, indoor	7,457	6,335	6,037	6,806	6,329
Begonias, outdoor	6,880	6,708	6,135	6,099	5,357
Petunias, outdoor	8,409	6,923	6,878	5,592	5,182
Poinsettias, indoor	7,222	6,451	5,690	5,899	4,741
African violets, indoor	8,937	7,278	3,833	4,377	4,296
Hawker's balsams, outdoor	4,121	3,889	3,977	4,067	3,551
Gerberas, indoor	5,042	4,230	4,171	4,345	3,422
Orchids, indoor	3,137	2,115	3,036	3,170	3,020
Lilies, indoor	5,845	3,495	2,811	3,121	2,783
Chrysanthemums, outdoor	4,018	3,630	3,660	2,969	2,622
Calibrachos, outdoor	..	2,624	2,373	2,310	2,388
Tulips, indoor	2,321	2,090	2,158	2,216	2,381
Primulas, indoor	2,396	3,078	2,291	1,960	2,027
Cyclamens, indoor	2,340	1,925	1,719	1,843	1,646
Pansies, outdoor	..	1,456	1,619	1,680	1,585
Indoor hanging pots	1,505	1,275	940	1,212	1,313
Dahlia, outdoor	..	983	974	918	915
Verbenas, outdoor	..	821	1,130	845	871
Azaleas, indoor	1,131	930	611	656	494
Argyranthemum, outdoor	410	299	319	251	231
Rudbeckias, outdoor	..	147	190	180	208
Heliopsis, outdoor	..	67	42	48	67
Other indoor pots	17,962	15,597	13,241	14,081	14,013
Other outdoor pots	54,736	48,503	44,872	45,407	46,107
Total potted plants	217,189	216,382	209,260	213,187	208,208

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)

	2015	2016	2017	2018	2019
Geraniums, cuttings	13,651	14,095	12,318	11,316	11,995
Poinsettias, cuttings	4,494	5,424	5,159	5,046	5,435
Impatiens, cuttings	4,578	4,809	4,153	3,821	4,229
Chrysanthemums, cuttings	3,926	3,897	4,115	4,001	4,117
Other cuttings	71,692	61,519	62,164	60,429	63,426
Total cuttings	98,342	89,744	87,910	84,614	89,202

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)

	2015	2016	2017	2018	2019
Tulips, stems	120,021	111,177	119,132	124,903	120,896
Gerberas, stems	75,229	87,778	81,079	80,295	69,183
Snapdragons, stems	12,146	23,772	18,864	20,725	22,360
Chrysanthemums, stems	33,562	25,377	23,142	21,769	20,654
Lilies, stems	9,745	11,557	9,999	12,113	11,525
Lisianthus, stems	5,499	5,793	5,440	4,016	6,208
Roses, stems	5,388	x	4,417	3,557	3,831
Freesias, stems	4,576	5,821	5,979	4,745	3,732
Alstroemerias, stems	12,250	8,964	7,491	5,754	3,365
Irises, stems	3,239	x	1,834	2,033	1,649
Daffodils, stems	4,061	3,746	2,623	2,759	1,386
Other cut flowers	28,657	16,485	11,341	13,618	20,611
Total cut flowers	314,373	306,315	291,342	296,285	285,402

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)

	2015	2016	2017	2018	2019
Newfoundland and Labrador	276	x	x	254	247
Prince Edward Island	x	x	x	70	69
Nova Scotia	1,142	999	975	965	922
New Brunswick	x	401	467	253	249
Quebec	5,129	4,821	4,237	4,035	4,165
Ontario	9,232	9,105	8,624	7,927	7,364
Manitoba	1,182	780	749	786	911
Saskatchewan	654	613	564	622	614
Alberta	4,061	4,065	3,714	3,589	3,312
British Columbia	849	811	859	827	816
Canada	22,914	21,915	20,522	19,327	18,667

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)

	2015	2016	2017	2018	2019
Newfoundland and Labrador	20	20	23	21	18
Prince Edward Island	2	x	4	3	3
Nova Scotia	10	9	10	11	11
New Brunswick	9	x	9	10	10
Quebec	58	60	61	58	55
Ontario	65	65	65	65	65
Manitoba	10	10	10	11	12
Saskatchewan	9	9	8	9	13
Alberta	30	26	26	26	26
British Columbia	30	30	30	30	30
Canada	243	240	246	244	243

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 production¹ 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

Note:

1. The last Census of Agriculture was conducted in 2016. The next Census of Agriculture will occur in 2021.

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

1.13. Christmas tree production¹ 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

Note:

1. The last Census of Agriculture was conducted in 2016. The next Census of Agriculture will occur in 2021.

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)

	2015	2016	2017	2018	2019
Greenhouse flower and plants	1,506.0	1,510.2	1,503.9	1,555.7	1,565.8
Nursery ¹	759.5	670.5	659.5	660.8	679.6
Sod	157.0	146.8	147.3	139.8	133.6
Total	2,422.5	2,327.4	2,310.7	2,356.2	2,379.0

Note:

1. Operations which exclusively produce tree seedlings for reforestation are outside the scope since 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)

	2015	2016	2017	2018	2019
Potted plants ¹	785.9	811.6	789.7	834.2	853.0
Bedding plants, ornamental	179.8	192.2	204.2	204.8	208.7
Cut flowers	146.6	140.1	127.8	133.2	133.5
Cuttings	49.9	44.2	44.8	44.2	48.4
Total	1,162.1	1,188.0	1,166.5	1,216.4	1,243.6

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)

	2015	2016	2017	2018	2019
Newfoundland and Labrador	8.1	x	8.7	8.6	8.2
Prince Edward Island	5.1	x	5.5	5.5	5.7
Nova Scotia	13.4	17.0	13.0	12.7	13.1
New Brunswick	37.9	x	44.3	45.2	46.3
Quebec	163.8	177.0	192.6	212.2	215.2
Ontario	795.4	790.5	774.9	805.0	817.6
Manitoba	F	33.6	33.4	35.4	35.9
Saskatchewan	16.0	13.2	10.9	12.1	13.5
Alberta	78.9	77.3	76.9	79.9	76.0
British Columbia	352.8	343.8	343.9	339.0	334.4
Canada	1,506.0	1,510.2	1,503.9	1,555.7	1,565.8

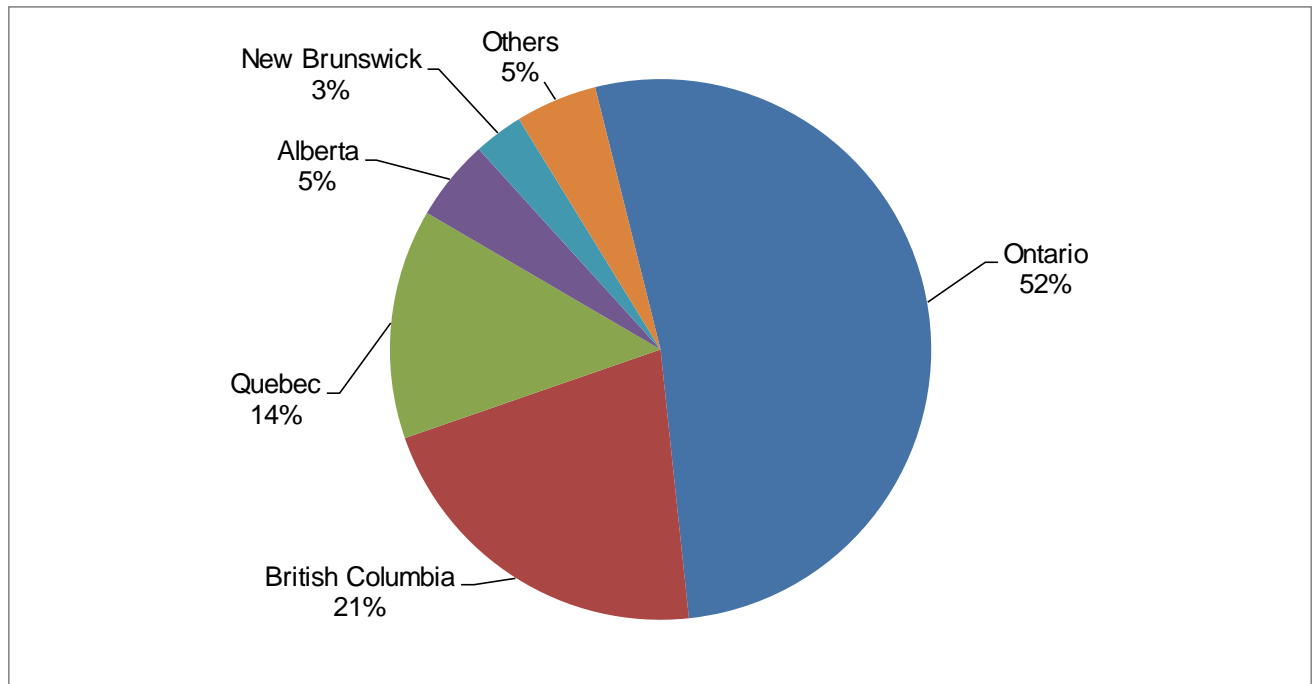
Notes:

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, 2019



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



2.5. Nursery stock^{1,2} sales and resales by province (millions of Canadian dollars)

	2015	2016	2017	2018	2019
Newfoundland and Labrador	x	x	x	0.7	0.6
Prince Edward Island	x	x	x	1.0	1.2
Nova Scotia	12.1	10.6	10.5	10.8	10.5
New Brunswick	5.6	3.5	3.2	3.3	3.0
Quebec	106.0	89.4	87.7	86.3	90.5
Ontario	312.3	303.6	290.4	276.9	279.0
Manitoba	14.8	15.2	14.4	15.5	14.5
Saskatchewan	8.1	5.1	6.2	5.2	5.2
Alberta	55.6	47.0	47.2	48.4	46.7
British Columbia	243.0	194.3	198.1	212.6	228.4
Canada	759.5	670.5	659.5	660.8	679.6

Notes:

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

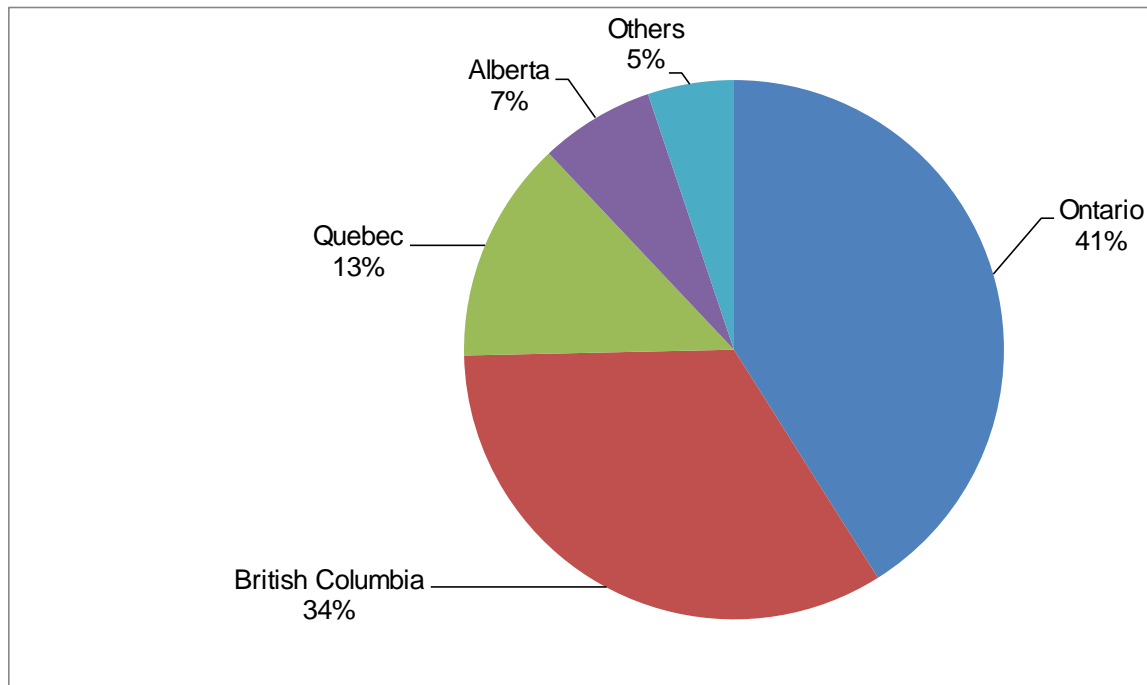
2. The term "nursery stock" covers a diverse range of non-edible, living plant material grown in field or in containers and sold with its root system intact. Nursery stock includes annual and perennial plants ranging from woody plants (e.g. trees, shrubs and rose bushes) to bedding plants and potted 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. Nursery stock sales and resales by province – percentage share, 2019



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

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

	2015	2016	2017	2018	2019
Newfoundland and Labrador	2.8	2.5	x	2.7	2.5
Prince Edward Island	x	x	x	0.6	0.6
Nova Scotia	4.8	3.5	4.1	3.9	4.3
New Brunswick	x	x	3.0	2.1	2.1
Quebec	33.2	31.8	29.7	29.3	27.4
Ontario	61.2	56.9	59.1	54.5	53.0
Manitoba	7.4	4.6	4.3	4.1	4.5
Saskatchewan	5.1	4.4	3.9	4.3	4.3
Alberta	28.1	28.6	27.8	26.6	23.8
British Columbia	10.7	11.4	12.0	11.5	11.1
Canada	157.0	146.8	147.3	139.8	133.6

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 32-10-0034-01 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)

	2015	2016	2017	2018	2019
Mass market chain stores	451.8	476.1	488.7	474.3	429.2
Domestic wholesalers	289.6	278.8	283.1	309.6	317.4
Direct sales to the public ¹	215.7	224.1	201.4	218.9	219.9
Exported	123.2	144.4	141.9	158.9	210.1
Retail florists	191.4	171.1	165.7	183.8	176.9
Other greenhouses	167.8	161.2	175.2	160.0	173.2
Government and public agencies	20.2	13.1	11.6	12.2	10.9
Other channels	46.4	41.3	36.2	38.0	28.4
Total sales²	1,506.0	1,510.2	1,503.9	1,555.7	1,565.8

Notes:

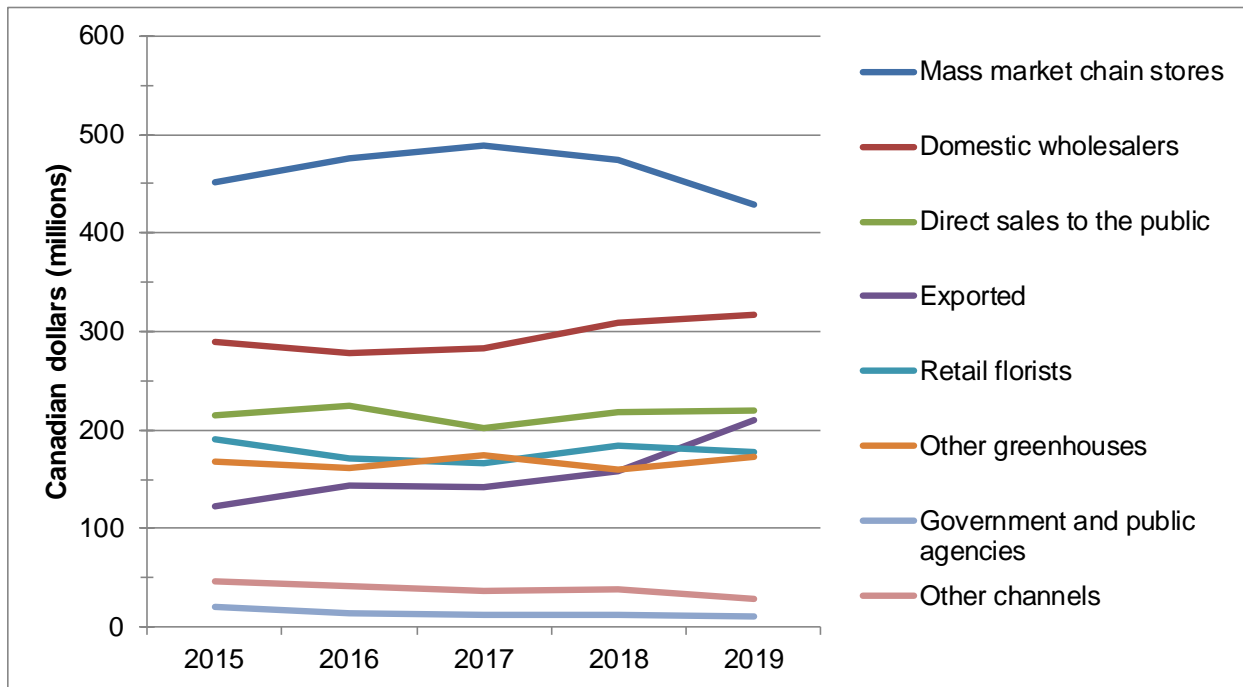
1. Includes roadside stands and owner-operated retail outlets.

2. Operations which exclusively produce tree seedlings for reforestation are outside the scope since 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, 2015–2019



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)

	2015	2016	2017	2018	2019
Landscape contractors	171.2	177.1	182.4	170.2	173.8
Garden centres	141.1	130.8	122.3	115.5	116.2
Mass market chain stores	123.8	107.8	100.7	106.2	109.0
Direct sales to the public ¹	79.0	75.1	89.4	97.0	106.1
Other growers	69.6	79.4	75.2	75.6	77.4
Exported	29.6	22.2	25.7	30.5	27.1
Fruit growers	34.4	22.9	20.2	22.2	25.7
Government and public agencies	54.9	31.2	23.9	22.6	23.8
Other channels	55.8	24.0	19.9	21.0	20.5
Total sales²	759.5	670.5	659.5	660.8	679.6

Notes:

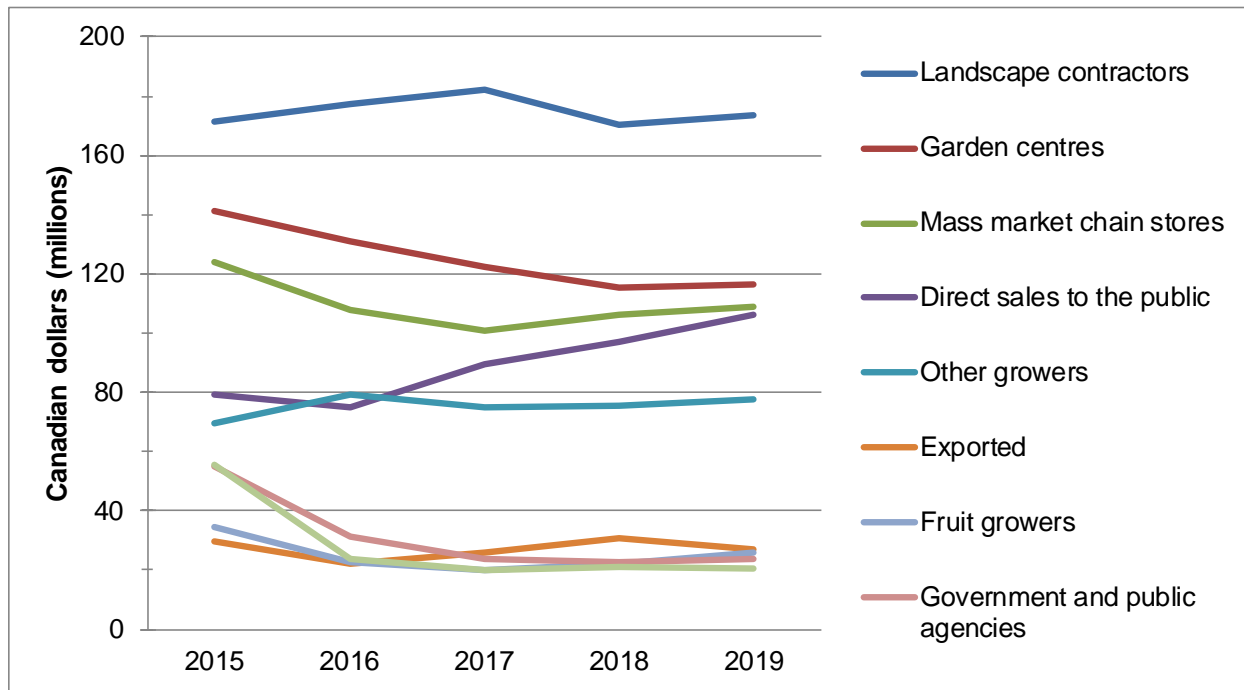
1. Includes roadside stands and owner-operated retail outlets.

2. Operations which exclusively produce tree seedlings for reforestation are outside the scope since 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, 2015–2019



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 plant^{1,2} producers' operating expenses by category (millions of Canadian dollars)

	2015	2016	2017	2018	2019
Gross yearly payroll ²	339.7	322.6	294.7	292.4	299.6
Plant material purchases for growing on ³	221.2	216.0	219.9	213.2	214.6
Plant material purchases for resale ³	127.5	114.4	113.2	112.5	92.8
Fuel	61.5	55.3	54.2	58.0	53.9
Electricity ⁴	27.7	28.9	25.8	26.0	24.9
Other crop expenses ⁵	124.4	141.2	156.8	150.2	160.8
Other operating expenses ⁶	211.8	208.5	183.2	181.8	190.5
Total operating expenses⁷	1,113.7	1,086.8	1,047.9	1,034.2	1,037.0

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)

	2015	2016	2017	2018	2019
Atlantic provinces	55.0	52.0	54.6	55.8	55.4
Quebec	114.1	119.0	115.8	116.3	122.6
Ontario	597.8	614.7	606.4	594.8	604.0
Prairie provinces	94.9	79.3	81.4	87.2	77.8
British Columbia	251.8	221.7	190.6	180.1	177.2
Canada	1,113.7	1,086.8	1,047.9	1,034.2	1,037.0

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



4.3. Nursery operating expenses¹ by category (millions of Canadian dollars)

	2015	2016	2017	2018	2019
Gross yearly payroll ²	233.8	201.6	197.2	191.7	195.3
Plant material purchases for growing on ³	91.3	96.4	97.2	99.2	102.3
Plant material purchases for resale ³	90.0	98.4	94.3	97.6	99.7
Electricity expenses	..	5.7	4.6	5.5	6.2
Other crop expenses ⁴	..	60.5	62.2	64.9	65.9
Other operating expenses ⁵	227.6	115.5	110.1	116.3	120.9
Total Operating Expenses	642.7	578.2	565.6	575.2	590.3

Notes:

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

2. Includes seasonal and permanent labour.

3. Includes value of trees, nursery stock, bedding plants, seedlings, cuttings or 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 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)

	2015	2016	2017	2018	2019
Newfoundland and Labrador	0.5	x	x	0.6	0.5
Prince Edward Island	1.3	x	x	0.9	0.8
Nova Scotia	11.1	10.2	10.2	10.7	10.3
New Brunswick	5.5	3.5	3.4	2.6	2.3
Quebec	95.6	78.3	78.2	74.5	77.2
Ontario	268.5	272.6	257.8	253.7	260.6
Manitoba	13.8	13.0	12.7	13.2	12.5
Saskatchewan	6.4	4.1	4.8	5.6	6.2
Alberta	50.4	41.5	42.1	40.5	39.9
British Columbia	189.7	153.4	154.7	173.0	180.0
Canada	642.7	578.2	565.6	575.2	590.3

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)

	2015	2016	2017	2018	2019
Gross yearly payroll ¹	45.6	40.8	38.9	37.2	36.1
Sod purchases for resale	1.8	1.4	2.7	2.5	2.2
Other operating expenses ²	78.3	75.1	71.7	65.8	65.4
Total operating expenses³	125.6	117.4	113.3	105.5	103.7

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)

	2015	2016	2017	2018	2019
Newfoundland and Labrador	2.4	2.0	x	2.0	2.5
Prince Edward Island	x	x	x	0.4	0.4
Nova Scotia	x	3.8	3.9	4.0	3.6
New Brunswick	1.1	x	2.5	2.0	1.9
Quebec	26.9	24.5	23.7	22.1	22.1
Ontario	51.0	46.4	45.0	41.8	41.0
Manitoba	4.6	3.0	2.9	2.8	3.2
Saskatchewan	3.6	3.6	3.2	3.3	3.3
Alberta	21.6	22.0	18.8	17.2	15.8
British Columbia	9.8	9.9	10.5	9.9	10.0
Canada¹	125.6	117.4	113.3	105.5	103.7

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 employees¹

		2015	2016	2017	2018	2019
Nursery	Seasonal employees ²	9,643	7,896	7,184	6,812	6,341
	Permanent employees ³	3,862	3,560	3,331	3,044	3,126
	Total employees	13,505	11,456	10,515	9,856	9,467
Sod	Seasonal employees ²	1,225	1,117	1,140	1,126	1,127
	Permanent employees ³	480	461	428	411	406
	Total employees	1,705	1,578	1,568	1,537	1,533
Specialized greenhouse flowers and plants	Seasonal employees ²	11,867	10,893	10,195	9,725	9,212
	Permanent employees ³	6,627	6,288	5,691	5,380	5,063
	Total employees	18,494	17,181	15,886	15,105	14,275

Notes:

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

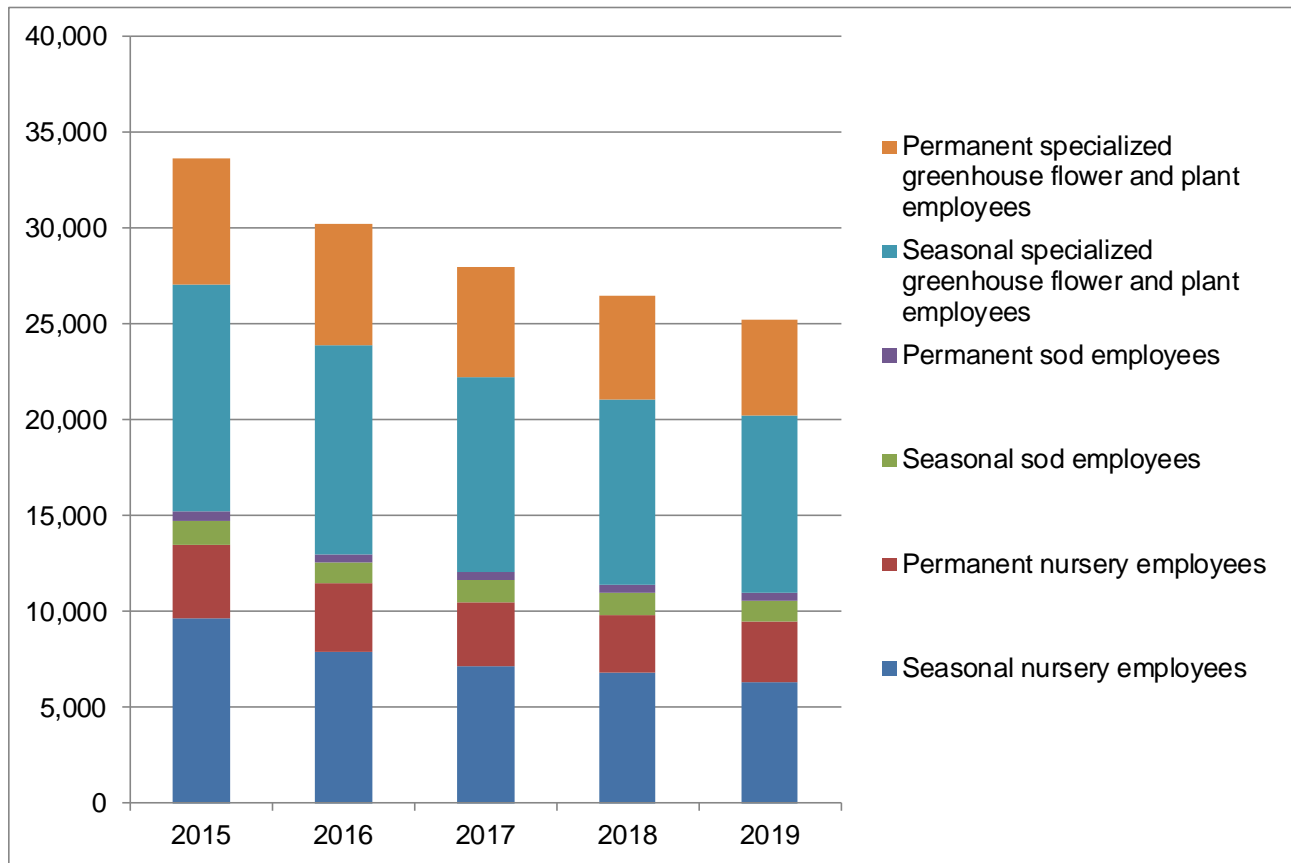
2. Seasonal employees who worked less than 8 months during the year.

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



5.2. Total employees by sector, 2015–2019



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)

		2015	2016	2017	2018	2019
Bulbs, tubers, tuberous roots, etc.	Exports	19,662	22,195	22,050	21,959	27,234
	Imports	52,589	54,525	53,370	55,895	51,945
	Trade balance	-32,928	-32,329	-31,320	-33,936	-24,711
Other live plants, including their roots, cuttings and slips, etc.	Exports	300,877	321,483	339,499	363,521	419,202
	Imports	231,393	241,080	262,371	275,824	299,944
	Trade balance	69,484	80,403	77,128	87,697	119,258
Cut flowers and flower buds for bouquets or ornamental purposes, etc.	Exports	62,653	75,413	76,140	80,067	85,176
	Imports	168,054	165,028	172,869	170,317	167,778
	Trade balance	-105,401	-89,615	-96,729	-90,251	-82,602
Foliage, branches and other parts of plants, etc.¹	Exports	54,954	57,945	63,034	77,229	96,291
	Imports	36,909	37,766	42,464	45,207	47,636
	Trade balance	18,044	20,179	20,570	32,022	48,655
Total	Exports	438,145	477,037	500,722	542,775	627,903
	Imports	488,945	498,399	531,074	547,243	567,303
	Overall trade balance	-50,801	-21,362	-30,351	-4,468	60,600

Note:

1. Includes Christmas trees.

Source: Statistics Canada (CATSNet, August 2020)



6.2. Exports

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

	2015	2016	2017	2018	2019
Newfoundland and Labrador	0	0	1	7	0
Prince Edward Island	3,222	3,667	3,776	4,318	4,672
Nova Scotia	20,472	18,387	18,645	17,670	20,551
New Brunswick	28,895	31,614	30,331	34,374	36,419
Quebec	37,627	39,640	44,837	54,358	75,857
Ontario	249,566	275,071	289,460	312,363	349,820
Manitoba	1,288	1,361	1,274	1,305	1,500
Saskatchewan	68	62	134	92	113
Alberta	279	328	163	219	190
British Columbia	96,724	106,907	112,102	118,068	138,782
Canada²	438,145	477,037	500,722	542,775	627,903

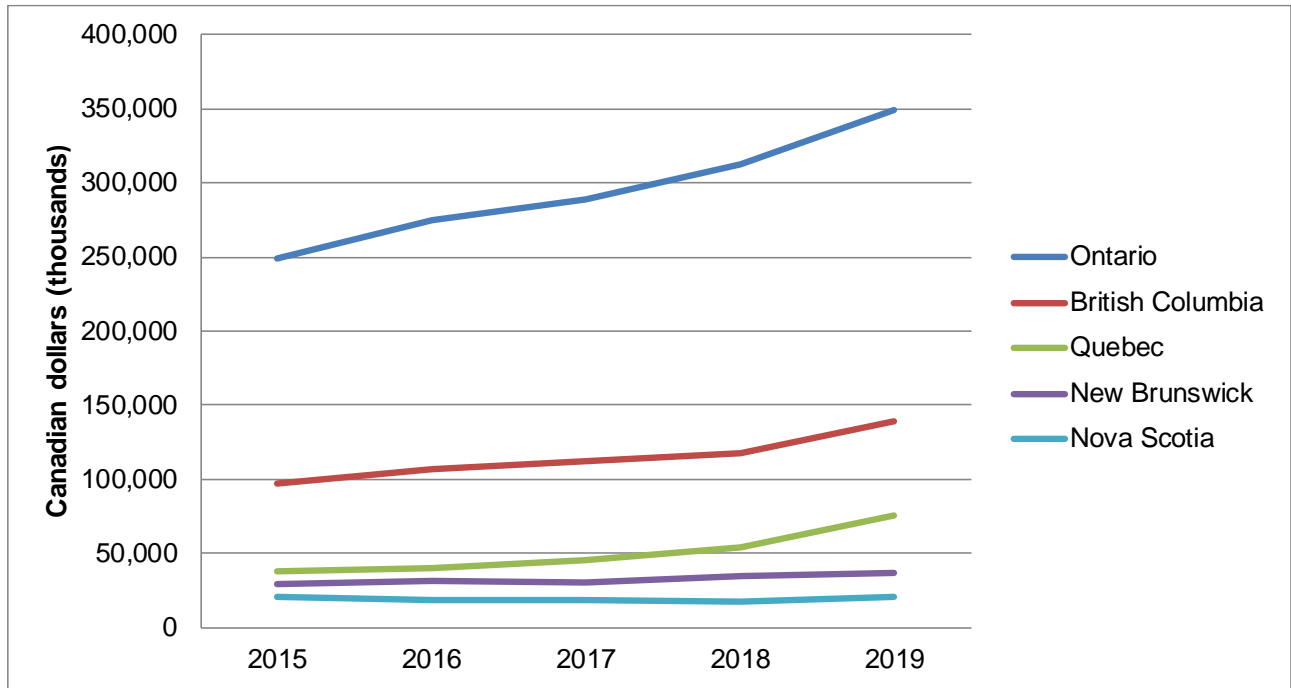
Notes:

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

Source: Statistics Canada (CATSNet, August 2020)

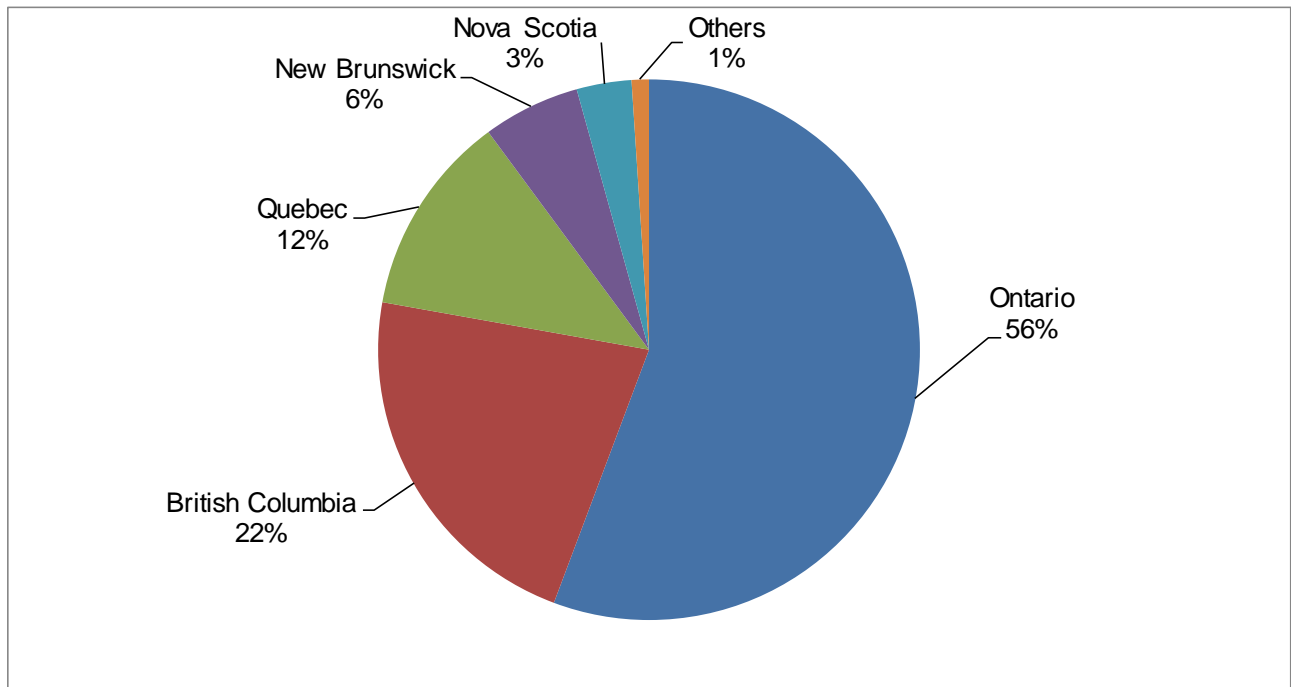


6.2.2. Floriculture and nursery exports by province, 2015–2019



Source: Statistics Canada (CATSNet, August 2020)

6.2.3. Floriculture and nursery exports by province – percent share, 2019



Source: Statistics Canada (CATSNet, August 2020)



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

	2015	2016	2017	2018	2019
United States	431,542	472,923	496,826	539,142	623,691
Panama	3,343	1,738	1,901	1,683	1,767
Aruba	136	218	226	255	380
Curaçao	241	416	430	286	329
Bermuda	219	265	244	265	286
France	86	25	46	50	160
Venezuela	474	278	0	0	117
Japan	253	205	140	141	113
Australia	128	83	110	5	105
United Arab Emirates	52	148	87	93	100
Others	1,670	739	712	856	854
Total	438,145	477,037	500,722	542,775	627,903

Note:

1. Includes Christmas trees.

Source: Statistics Canada (CATSNet, August 2020)



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

	2015	2016	2017	2018	2019
Prince Edward Island	18	0	0	0	0
Nova Scotia	8,628	7,208	7,072	6,701	9,477
New Brunswick	7,903	7,894	7,297	11,233	10,788
Quebec	24,373	27,426	34,157	43,649	59,807
Ontario	473	474	863	649	408
Manitoba	0	0	0	9	0
Saskatchewan	21	34	9	24	34
British Columbia	22	53	9	686	1,323
Canada	41,438	43,090	49,406	62,951	81,837

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, August 2020)

6.2.6. Christmas tree exports by province¹ (number)

	2015	2016	2017	2018	2019
Prince Edward Island	590	0	0	0	0
Nova Scotia	365,095	353,586	317,438	280,512	392,149
New Brunswick	266,669	298,425	250,557	314,687	345,861
Québec	1,061,691	1,265,217	1,666,198	1,612,576	2,046,599
Ontario	21,699	23,491	34,486	25,040	13,888
Manitoba	0	0	0	851	0
Saskatchewan	1,665	2,412	695	1,425	1,273
British Columbia	2,326	9,358	713	25,597	39,931
Canada	1,719,735	1,952,489	2,270,087	2,260,688	2,839,701

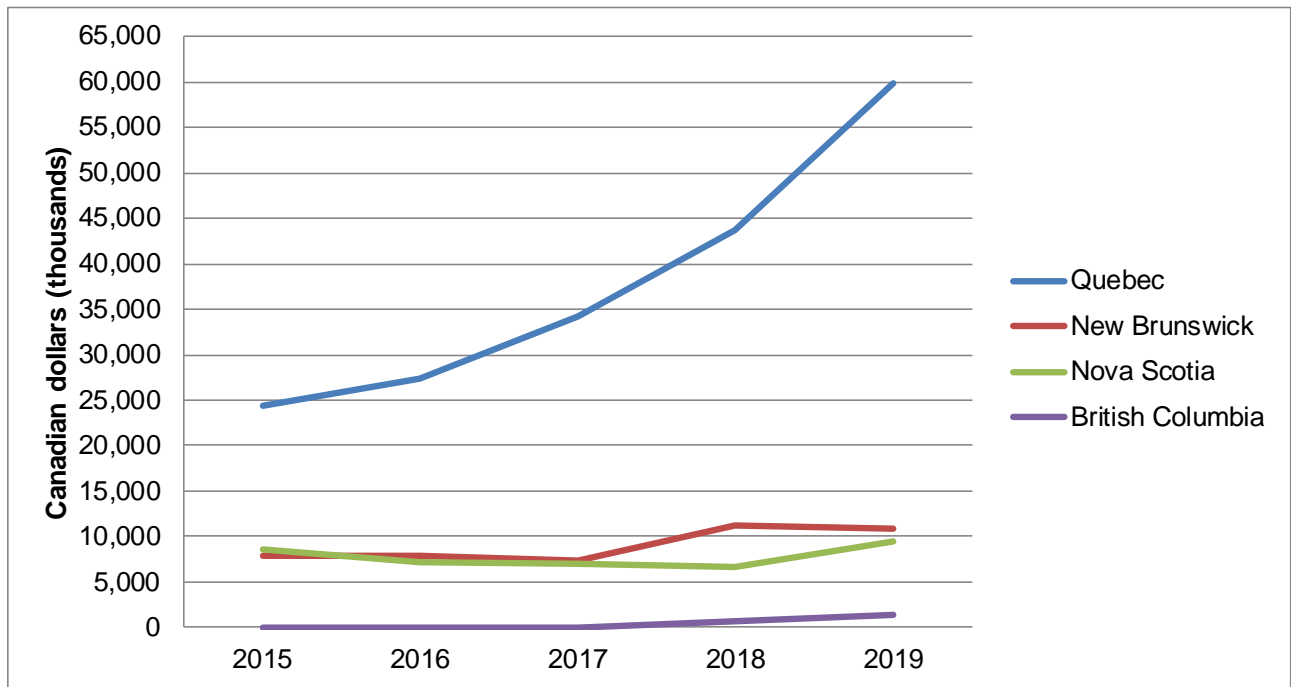
Note:

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

Source: Statistics Canada (CATSNet, August 2020)



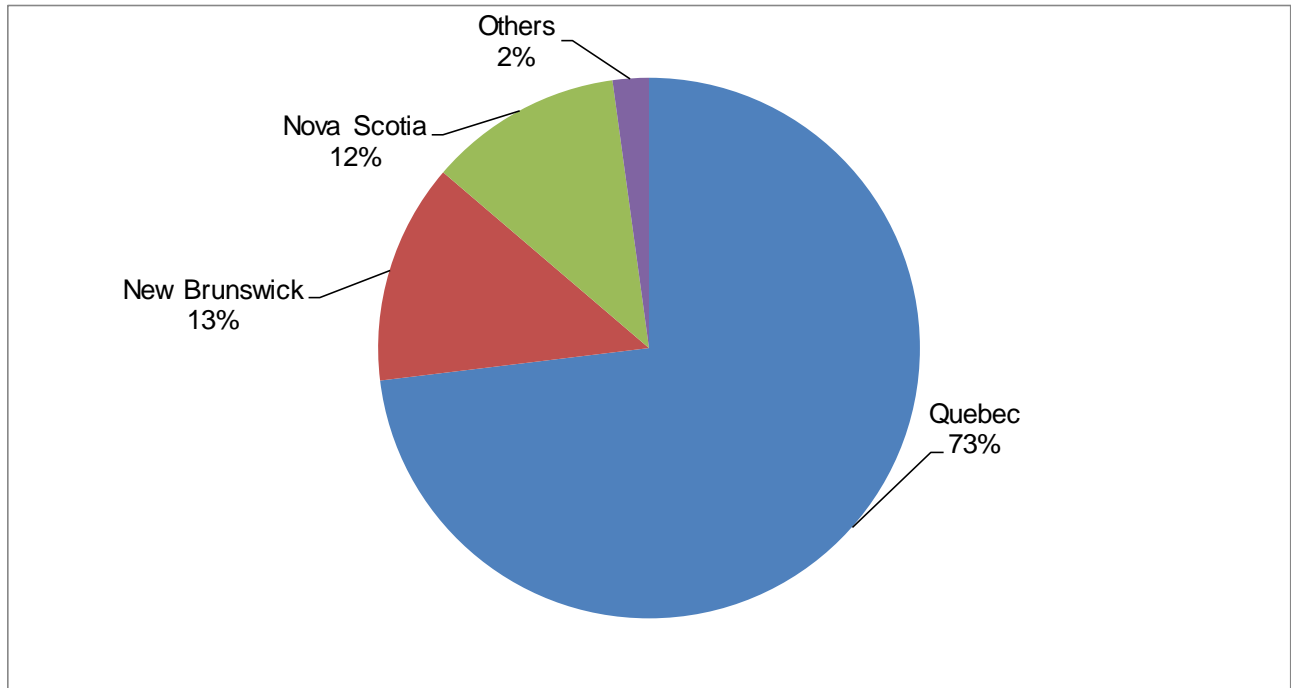
6.2.7. Christmas tree exports by province, 2015–2019



Source: Statistics Canada (CATSNet, August 2020)



6.2.8. Christmas tree exports by province – percentage share, 2019



Source: Statistics Canada (CATSNet , August 2020)

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

	2015	2016	2017	2018	2019
United States	36,666	39,662	46,043	60,025	78,315
Panama	3,343	1,738	1,901	1,683	1,767
Aruba	136	218	226	255	351
Curaçao	241	416	430	286	329
Bermuda	219	264	242	243	269
Venezuela	474	278	0	0	117
United Arab Emirates	52	148	87	93	100
Sint Maarten (Dutch part)	60	82	53	57	98
Singapore	0	0	33	35	91
Cayman Islands	29	29	73	52	80
Others	217	256	317	222	320
Total	41,438	43,090	49,406	62,951	81,837

Source: Statistics Canada (CATSNet, August 2020)



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

	2015	2016	2017	2018	2019
United States	1,634,249	1,866,218	2,206,996	2,198,116	2,769,207
Panama	53,283	51,133	32,057	35,690	34,394
Aruba	2,270	4,189	3,963	4,676	6,990
Bermuda	4,921	5,466	6,321	5,708	6,470
Curaçao	4,407	7,680	7,856	5,975	5,811
Cayman Islands	660	1,022	1,624	1,419	2,207
Venezuela	13,483	6,206	0	0	2,201
United Arab Emirates	1,364	3,921	1,906	2,220	2,092
Singapore	0	0	845	848	1,948
Sint Maarten (Dutch part)	924	1,572	1,148	872	1,719
Others	4,174	5,082	7,371	5,164	6,662
Total	1,719,735	1,952,489	2,270,087	2,260,688	2,839,701

Source: Statistics Canada (CATSNet, August 2020)

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

	2015	2016	2017	2018	2019
New York	51,935	59,799	64,505	68,054	77,300
Washington, state	33,702	40,375	43,009	44,095	49,636
Florida	33,916	31,400	30,236	36,013	42,387
Michigan	28,058	28,805	30,244	32,657	41,162
Illinois	24,360	23,019	25,588	29,520	38,918
Massachusetts	31,170	33,102	32,827	31,690	37,086
California	18,565	25,362	28,609	30,610	28,517
Maine	23,486	24,252	24,838	25,338	27,590
Pennsylvania	22,269	22,471	20,632	26,729	26,856
New Jersey	18,065	20,400	20,679	22,435	26,263
Other U.S. States	146,016	163,937	175,660	192,000	227,976
Total, United States	431,542	472,923	496,826	539,142	623,691

Note:

1. Includes Christmas trees.

Source: Statistics Canada (CATSNet, August 2020)



6.3. Imports

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

	2015	2016	2017	2018	2019
Newfoundland and Labrador	117	101	106	129	126
Prince Edward Island	6	10	4	0	8
Nova Scotia	1,302	1,459	1,627	1,839	1,883
New Brunswick	6,280	6,215	7,314	8,405	9,872
Quebec	61,321	66,070	64,910	59,996	56,685
Ontario	254,559	262,907	289,971	306,068	325,894
Manitoba	33,809	32,159	27,662	30,331	26,509
Saskatchewan	5,764	5,877	2,947	4,201	6,593
Alberta	7,222	7,687	15,307	11,238	10,798
British Columbia	118,565	115,915	121,226	125,035	128,934
Canada	488,945	498,399	531,074	547,243	567,303
Note:					
1. Includes Christmas trees.					
Source: Statistics Canada (CATSNet, August 2020)					

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

	2015	2016	2017	2018	2019
United States	227,716	230,182	251,838	261,485	276,635
Colombia	98,089	103,526	111,072	111,380	106,700
Netherlands	53,640	55,923	58,827	61,718	58,285
Ecuador	45,503	39,015	37,764	36,525	37,236
Mexico	7,391	8,495	8,719	10,594	13,815
Taiwan	6,606	6,780	6,660	8,280	11,182
Guatemala	4,119	5,726	6,289	7,522	7,431
China	3,928	3,932	4,365	4,020	5,870
Costa Rica	7,092	6,197	5,458	5,548	5,762
Israel	4,896	4,581	5,624	5,409	5,575
Others	29,966	34,042	34,458	34,762	38,811
Total	488,945	498,399	531,074	547,243	567,303
Note:					
1. Includes Christmas trees.					
Source: Statistics Canada (CATSNet, August 2020)					



7. World data

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

	2015	2016	2017	2018	2019
Netherlands	11,844,251	12,851,550	13,198,359	14,197,377	14,396,898
Colombia	1,665,208	1,758,789	1,846,648	1,913,830	1,986,219
Germany	1,195,246	1,344,479	1,335,156	1,465,103	1,431,446
Italy	973,549	1,113,879	1,212,402	1,365,030	1,350,415
Ecuador	1,048,778	1,071,972	1,159,629	1,110,364	1,177,241
Belgium	754,075	799,324	784,586	915,226	929,536
Kenya	684,999	750,210	787,804	815,550	864,849
Spain	400,736	476,963	530,577	625,139	639,635
Canada	442,212	485,166	509,041	548,893	633,394
Denmark	593,382	633,217	639,899	638,238	630,559
Others	4,560,263	4,890,052	5,032,314	5,342,000	5,828,939
Total	24,162,698	26,175,600	27,036,416	28,936,751	29,869,131

Source: Global Trade Tracker (August 2020)

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

	2015	2016	2017	2018	2019
Germany	3,747,037	4,082,219	4,103,897	4,400,504	4,302,752
Netherlands	2,963,053	3,166,446	3,275,447	3,477,670	3,485,516
United States	2,559,786	2,874,627	2,969,817	3,146,159	3,432,769
United Kingdom	2,084,464	2,128,309	2,013,124	2,078,718	1,992,829
France	1,416,869	1,545,206	1,581,796	1,700,766	1,693,264
Japan	710,194	773,905	758,406	787,588	797,759
Italy	758,776	795,777	824,419	794,236	781,777
Switzerland	692,001	733,054	730,484	769,641	756,629
Russia	917,371	766,489	739,964	774,508	747,428
Belgium	504,559	589,458	569,895	657,714	727,594
Others ¹	6,324,257	6,879,785	7,546,713	8,334,825	8,467,854
Total	22,678,367	24,335,276	25,113,961	26,922,328	27,186,170

Note:

1. In 2019, Canada ranked 13th globally with imports totaling \$567 million.

Source: Global Trade Tracker (August 2020)



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.