

Market Realities – The Challenging State of Tree Stock

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Question:

What is the best way to properly ID a Dogwood?

Answer:











Overview

- ◆ Landscape Ontario
- ◆ Ontario's Horticulture Sector
- ◆ Nursery Sector Size and Composition
- ◆ Growers' Issues
- ◆ Industry Research and Development
- ◆ Alternatives to Ash and Norway Maple Project

Landscape Ontario

- ◆ Started in 1973 has become one of the largest and most active horticultural associations in North America
- ◆ Include 10 sector groups and 9 regional chapters with over 2,400 members - communicate to a list of over 20,000
- ◆ Sectors represent all that design, install and maintain gardens and green infrastructure and all who grow and sell plants and garden products

Landscape Ontario

- ◆ Also a chapter in every major city
- ◆ Synergy and benefits of cooperation throughout the value-chain results in a prosperous, professional, ethical, recognized and valued green industry
- ◆ Produce two of the largest trade shows in North America – Congress and Garden Expo
- ◆ Founding members of a consumer show called Canada Blooms - expect over 200,000 people in 2012

Ontario's Horticulture Sector

- ◆ Ontario represents approximately 58% of the horticultural industry in Canada
- ◆ Ontario Nursery farm-gate production is approximately \$350,000,000 expanding to over \$7 billion throughout the supply chain
- ◆ Ontario horticulture employs approximately 70,000 people. As a comparison Chrysler employs 5,000 people in all of Canada.

Ontario Nursery Sector

Size and Composition – Statistics Canada 2010

Total Nurseries 415

Area

Field	21,385 acre	8,654 ha	91%
Container	2,145 acre	868 ha	9%
Total	23,530 acre	9,522 ha	

Total Nursery Sales

	\$285 million	
Stock Sales	\$215 million	75%
Resales	\$70 million	25%

Ontario Nursery Sector Sales Distribution

	Percent
Direct to Public	8
Fruit Growers	3
Landscape Contractors	27
Garden Centres	24
Mass Market Chain Stores	19
Other Growers	8
Export	4
Government	4
Other	3

Growers' Issues

- ◆ U.S. economic downturn and weak dollar
- ◆ Environmental concerns
 - pesticide use, water permits, leachate control, nutrient management
- ◆ Risk exposure due to regulated pests
- ◆ Sales forecasting and production planning
 - 3 to 15 year growing and sales cycle
- ◆ Operational efficiencies
 - production techniques, business management processes, and labour (availability, cost, regulation)

Growers' Issues

- ◆ Input costs continue to escalate
 - Labour
 - Fertilizer
 - Pesticide
 - Fuel – transportation and heating/cooling
 - Packaging – pots, film, labels, pallets, baskets
 - Electricity
- ◆ Very difficult to pass on to the consumer

Industry Research and Development

- ◆ Significant investment by L.O. Growers Group and Canadian Nursery and Landscape Association
- ◆ Benefit to the industry as a whole
- ◆ Partner with
 - Agriculture and Agri-Food Canada
 - Ontario Ministry of Agriculture and Food
 - Flowers Canada
 - University of Guelph, Niagara College, other
 - Vineland Innovation and Research Centre

Industry Research and Development

- ◆ Production Research
 - Regulatory and Environmental Stewardship
 - Water Use and Quality
 - Pest Management

- ◆ Industry Development Research
 - Consumer needs, value, awareness
 - Economic impact, input costs
 - Branding the industry
 - Public education

Alternatives to Ash and Norway Maple Project

- ◆ Issue with emerald ash borer and invasiveness of Norway Maple
- ◆ Objective to provide Ontario Nursery Growers with a list of alternatives to grow
- ◆ Must be hardy in urban environments
- ◆ List compiled from Ontario-based and Northeast U.S. research

Alternatives to Ash and Norway Maple Project

- ◆ Literature search into urban tolerant trees
- ◆ Industry survey and focus groups
 - Urban foresters
 - Landscape contractors
 - Landscape architects
- ◆ Resulting list includes 29 trees suitable for an Ontario urban setting
- ◆ Trees similar in size and form as ash
- ◆ Includes some smaller trees for sites where ash would be too large
- ◆ A broad selection of trees is necessary to encourage species diversity

Alternatives to Ash and Norway Maple Project

- ◆ Factsheets are accessible on the Landscape Ontario website



- ◆ Articles on these trees are available for consumer and trade media

Alternatives to Ash and Norway Maple Project

Maple

- Hedge, Freeman's, Amur, Three Flowered
- Columnare, Crimson King, Globosum, Royal Red

Hickory

- Bitternut, Shagbark

Oak

- Swamp White, Northern Pin, Bur
- Chinquapin, Shumard

Alternatives to Ash and Norway Maple Project

Kentucky Coffeetree

Crabapple

Amur Corktree

Yellow Buckeye

Serviceberry

Hackberry

Japanese Tree Lilac

Basswood

American Elm

Osage Orange

Ironwood

Callery Pear

Blue Ash

Ginko

Honeylocust

Baldcypress

Littleleaf Linden





THANK YOU

Have a Wonderful Conference!

