



**COHA** CANADIAN  
ORNAMENTAL  
HORTICULTURE  
ALLIANCE

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CANADIENNE DE  
L'HORTICULTURE  
ORNEMENTALE

# Greener Horizons 2030

Clear vision. Shared goals.  
Common voice. Effective actions.

Positioning the Canadian ornamental horticulture  
sector for maximum growth and sustainable  
prosperity into the next decade.



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# Forward from COHA President, Phil Paxton



On behalf of the Canadian Ornamental Horticulture Alliance (COHA), I am pleased to release the Greener Horizons 2030 Plant Strategy for the Canadian ornamental horticulture sector. Developed by industry for industry, the Plant Strategy seeks to position the Canadian ornamental horticulture sector for greater profitability and growth.

This Plant Strategy represents the efforts of our Alliance, comprised of the Canadian Nursery Landscape Association, Quebec Vert, and Flowers Canada Growers, to recognize and prioritize the issues that the Canadian ornamental horticulture sector faces. COHA believes that a united industry is a stronger industry, and that a stronger industry benefits all those working in it today and into the future.

Not only does the industry have a significant impact on Canada's economy (over \$14.4 billion to GDP), but also the products and services it provides are essential to the enjoyment of everyday life, the resilience of the environment, and the well-being of Canada's citizens.

Collectively, you have identified labour, environment, research and innovation, and risk management as the most pressing challenges currently facing our industry. The Plant Strategy identifies specific objectives we want to achieve and the actions that we need to undertake to realize them. There is much for us to do. The Plant Strategy will help guide our actions. COHA will have a strong government relations role.

The Plant Strategy will continue to evolve as new challenges arise or as actions have been taken. The Plant Strategy will serve to unify our actions as together we are stronger and can accomplish more. The input of our Alliance membership is crucial to the on-going evolution of our Plant Strategy.

We have set our industry up for success, now we just need to follow through.

**Phil Paxton**

**President, Canadian Ornamental Horticulture Alliance**







# Preamble

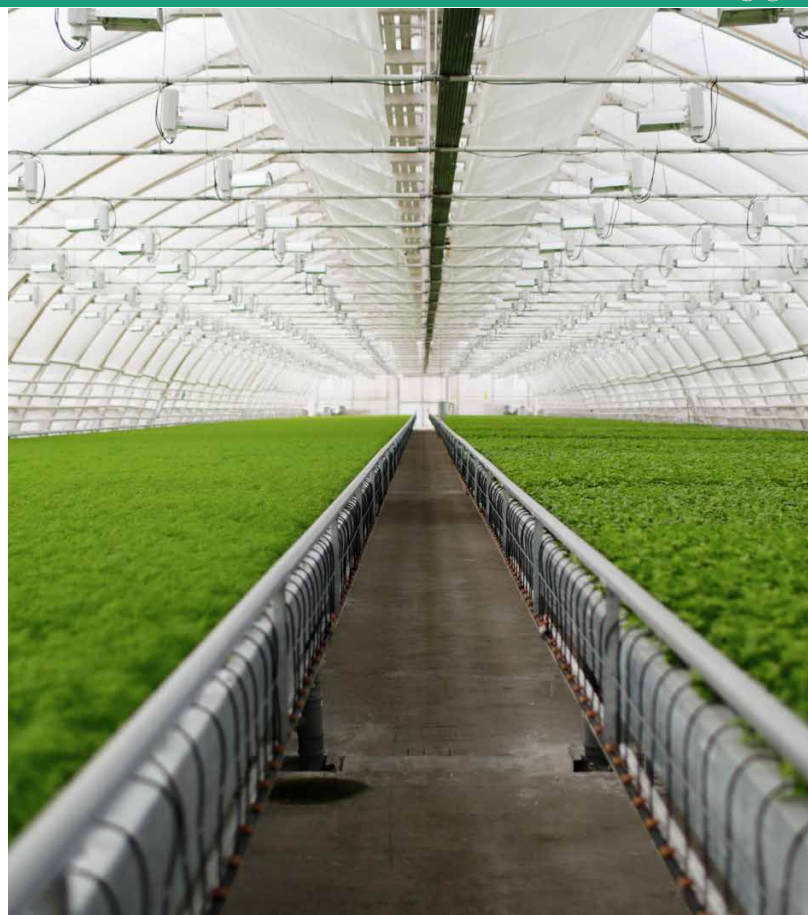
Although often overlooked and poorly understood, the ornamental horticulture sector is a key segment of Canada's agricultural community. Greenhouse, nursery, floriculture, and landscaping services. It cannot be overstated just how important the Canadian ornamental horticulture sector is. Not only does the industry have a significant impact on Canada's economy (**over \$14.4 billion to Gross Domestic Product [GDP]**), but the products and services it provides are essential to the enjoyment of everyday life, the resilience of the environment, and the well-being of Canada's citizens and our environment. With recent events exacerbating many of the challenges faced by the ornamental sector, now is the time for these issues to be addressed.

The impacts of the COVID-19 pandemic have reverberated across Canada's entire agricultural industry. Rapid plunges and spikes in demand, disrupted supply chains, shifting trade patterns, reduced access to labour, public health uncertainties, accelerated input cost increases, as well as consumer habits and preferences. These have all necessitated the application of new flexible ways of doing business, sometimes on the fly, and adapting to fluid operational dynamics that change from one day to the next.



For the Canadian ornamental horticulture sector, the pandemic has revealed and reinforced the true nature of the strengths, weaknesses, and threats it faces. It has been a test of the readiness and

resilience of the sector to withstand large-scale disruptive events. It has demonstrated the need for the sector to be more agile with its capacity to maintain production and services in times of fluctuating supply and demand.



But this period has also given the sector a genuine opportunity to step back and assess how it can best position itself for near and long-term growth, make new inroads into domestic and global markets, prioritize investments in research and innovation, and ensure it can both mitigate carbon emissions and adapt to a rapidly changing climate.

To better understand the challenges and priorities of Canada's ornamental industry and inform Canadian Ornamental Horticulture Alliance (COHA)'s strategic planning efforts, we commissioned Nanos Research to conduct outreach that would gauge the opinions among COHA members in the ornamental horticultural sector. The focus was on identifying the strengths, weaknesses, and opportunities of the sector related to labour, climate change, environmental sustainability, and challenges posed by government regulations and/or





policies. During February and March 2022, Nanos conducted an online survey and one-on-one interviews with COHA's membership, including members of the Canadian Nursery Landscape Association, Québec Vert, and Flowers Canada Growers.

COHA's membership identified many important perspectives on current challenges as well as near and long-term priorities. These extremely valuable insights will help guide and inform related proposals, recommendations, and

actions that COHA puts forward through its mandate as the national voice of Canada's ornamental horticulture sector. The tremendous opportunities and challenges presented to the Canadian ornamental horticulture sector over the past two years combined with the results of this survey have confirmed that there has never been a better time for the industry to step back and put forward a renewed national strategy for the industry. A new era of growth, prosperity, and sustainability is on the horizon. Together we will get there, unified, and stronger than ever.



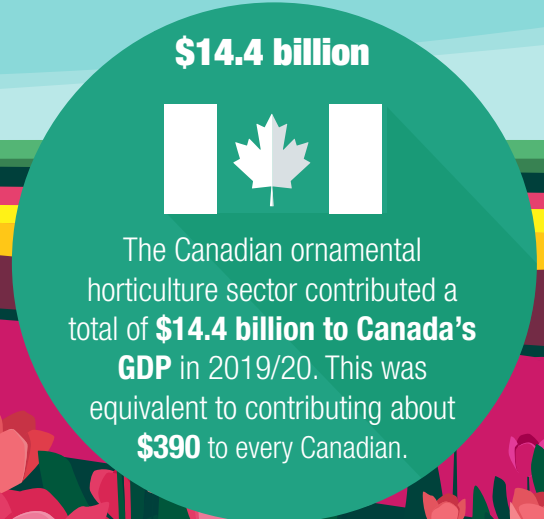




# ECONOMIC PROFILE OF THE CANADIAN ORNAMENTAL HORTICULTURE SECTOR\*

The ornamental horticulture sector is a significant stimulus to the entire Canadian economy.

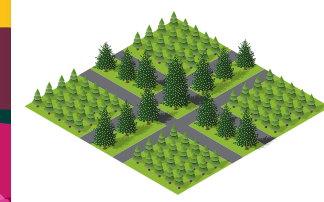
Ornamental horticulture is the **5th highest value crop in Canada**, with the value of ornamental products exceeding the combined value of all grains and oilseeds produced nationally.



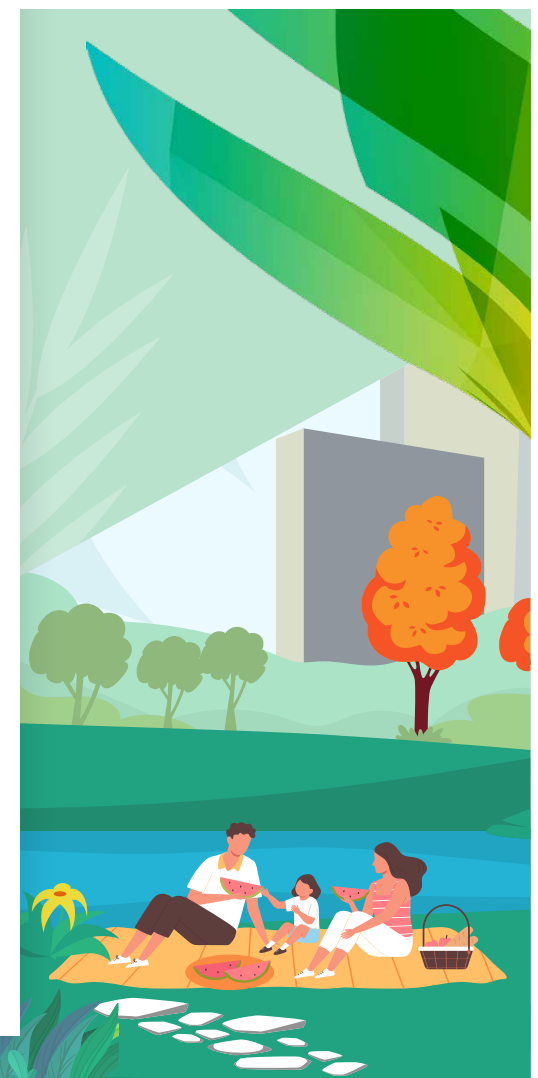
Total direct employment sustained by the activities of the ornamental horticulture sector exceeded **131,106** Full-Time Equivalent (FTEs) jobs in 2019/20.



The total number of people employed by the ornamental horticulture sector is significantly higher than the total number of FTEs due to the impact of seasonal employment. Using the standard ratio of total jobs to FTEs of 1.7, the total jobs sustained by the ornamental horticulture sector exceeded **222,881** positions.



The largest complement of jobs was sustained by the landscaping services subsector for a total of **104,982 FTEs**. Other ornamental horticultural subsectors (primary production) sustained the remaining **26,125 FTEs**.



The sector's farm gate sales (primary production) in 2020 exceeded **\$2.46 billion** with the total value at the retail level exceeding **\$5.3 billion**.



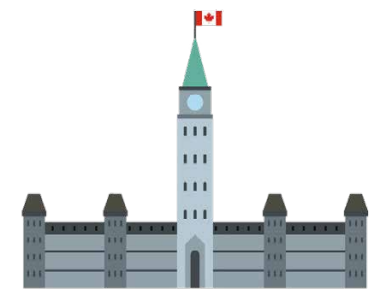
When landscaping services were added, the value of these products was estimated at an average value of **\$12.8 billion**.



Wages and salaries generated by the Canadian ornamental horticulture sector was **~\$7.9 billion**.



The average effective direct wage paid by the ornamental horticulture sector was **\$55,715** for primary production and **\$62,961** for landscaping services.



The three levels of government derive large streams of tax revenues on these impacts to the tune of **\$4.5 billion annually**. The Federal Government derive the lion's share of these tax revenue impacts with over **\$2.6 billion** in 2019/20. The Provincial governments combined derive about \$1.4 billion, whereas Local governments collected **\$466 million**.



The largest components of the tax revenues collected from the sector by the Federal and Provincial governments were derived from personal income taxes which accounted for **\$2.22 billion**. Corporate taxes accounted for the second-largest component with **\$892 million**. GST (HST) was the third largest element with **\$424 million**.



\*Source: Statistics Canada Data, 2020





# ORNAMENTAL HORTICULTURE PRODUCTS AND SERVICES

Delivering Important Benefits to All Canadians

## CLEAN AND RESILIENT ENVIRONMENTS

Trees and hedges provide windbreaks and noise reduction.

Urban heat island mitigation (dense tree canopies and green roofs = cooler temperatures, lower energy use).

Mitigation of carbon dioxide (ornamental plants and trees absorb and sequester a large amount of carbon dioxide from the atmosphere).

Water management and erosion control (retention, filtration, purification, flood control)

Plants used to enhance and lower costs of water and land treatment services (removal of toxins, chemicals, and heavy metals).

Plants and trees preserve and increase biodiversity, while providing food small mammals and pollinators such as bees and butterflies.

## HEALTHY BODIES AND MINDS

Plants provide excellent pollution filtration, improving air quality and reducing healthcare costs.

Better indoor quality (potted plants and living walls filter air and create oxygen).

Home gardening provides many physical and mental health benefits.

Time spent outdoors surrounded by ornamental plants and trees reduces stress and improves mental and emotional health.

Planned and managed green spaces enhance healthy lifestyles by enabling physical exercise and other recreation including sodded sports and fitness areas and playing fields.

## STRONG AND GROWING COMMUNITIES

Parks and public gardens attract tourism.

Greenspaces offer social gathering places.

Flowers and other ornamental plants add fragrance and visual beauty to urban environments.

Beautification of communities restores pride, lowers crime, and attracts investment.

Landscaped properties and parks increase property values.

Increased privacy and security (perceptions of safety).







# Summary Of Recent Economic And Business Trends Impacting The Canadian Ornamental Horticulture Sector

- The dramatic fluctuations in demand in 2020 and 2021 related to the pandemic and changing consumer priorities are expected to stabilize in the coming years with some permanent shifts likely in certain sub-sectors such as landscaping.
- In line with the growth of home gardening by Canadians during the pandemic, sales of home gardening products in Canada reached new heights in 2021 and the trend continues.
- Canadians had greater disposable income to spend on landscaping and related services because of the inability to do things like travel or dine out. Their appreciation for the outdoor elements of their properties has notably risen.
- With recent restrictions on indoor activities, Canadians have been spending more time in parks and other landscaped green spaces. Awareness of the value of these places has grown significantly.
- There has been a sizeable increase in demand for locally produced native plants as well as more environmentally sustainable, climate-resilient products.
- The Canadian Ornamental Horticulture sector has recently become a positive net exporter of ornamental products. In 2019 the sector generated \$628 million in exports vs. \$567.3 million in ornamental imports. This marked the first time the sector has generated a net positive trade balance since 2005.
- Supply chain disruptions from suppliers (e.g., production materials) and a significant inflationary environment risk are causing a significant erosion of margins and reduced profitability for ornamental growers and service providers. This includes fuel prices, transportation costs, fertilizer, and other inputs that make long-distance shipments less economically viable.







# Strategic Priorities

Labour. Research and Innovation.  
Environmental and Health.  
Risk management.

These are not necessarily new priority areas for the ornamental sector. They are the core challenges that industry members face, each with its own contributing strengths, weaknesses, opportunities, and threats. Many of the issues that underpin them are long-standing with various levels of progress and different challenges that must be overcome.

What is new is various contributing factors that are continuously evolving in each area. Most recently, the urgency and pressure for action that has been accelerated by rapidly changing economic, operational, trade, and consumer dynamics emerging from the COVID-19 pandemic.

These times call for a cohesive, integrated approach to addressing new and underlying challenges and collaborating across the industry along with government partners to identify and implement impactful, sustainable solutions that will work over the long-term. A concise and achievable strategy focused on four main themes that can bring meaningful and measurable results by the end of this decade and into the next.

To achieve the broad strategic goals laid out in this document, we need to define specific objectives that will contribute to successful outcomes. Each is a piece of a puzzle that when put together will empower the sector to excel and grow through good times and bad and be stronger and more resilient to whatever challenges that might appear down the road.



It is important to note that COHA's priority setting is driven by three guiding principles:

- a. The issue impacts all our members
- b. The issue is national in scope
- c. The issue is more effectively addressed by COHA than by any of its members alone

As such, it may not have the lead or have a direct mandate for all the issues found in this document with individual national and provincial trade associations being best placed to advance specific actions. However, as the national voice of the ornamental sector, we have the responsibility to lay the foundation for success in assessing and communicating the full spectrum of collective goals, objectives, and action items needed to get the industry to these greener horizons by no later than 2030.



## Theme #1 - Labour

Availability of and access to sufficient high and lower-skilled human resource capacity continues to be a critical challenge to the well-being of Canada's ornamental horticulture sector and its ability to grow and prosper.

The COVID-19 pandemic has highlighted how the ability of the sector to not only meet current demand but grow to meet future opportunities in both domestic and international markets is directly linked to their ability to access workers. Ornamental horticulture suppliers, growers, service providers, and supply chain partners have a strong demand for multiple levels and categories of skills, covering the range from seasonal fieldwork, and landscape services all the way to advance research, robotics, engineers, and the management of large, advanced export-oriented corporations.

Ornamental primary production is of particular concern and these jobs are especially challenging to fill using local workforces. This means ornamental horticulture producers must use seasonal and temporary foreign workers to meet this demand on an annual basis, while non-production segments of the sector have no access to equivalent labour sources. A recent economic study commissioned by COHA revealed that temporary foreign workers made up almost 50% of the total ornamental primary production workforce.

COHA recognizes that the federal government serves a key role in enabling the operation of Canada's ornamental horticulture sector through programs like the Seasonal Agriculture Workers Program (SAWP) and the low-skilled stream of the Temporary Foreign Workers Program (TFWP). Without these programs, many firms in the ornamental industry would simply not have access to sufficient human resource capacity to remain viable. In addition, only producers are currently able to access the SAWP program.

Given the large number of seasonal service providers in the ornamental horticulture sector (e.g., landscaping), it is critical that both primary producers and service providers can access enough workers when they need them. They need related government programming to be flexible and reflect the specific nature of their operations and business cycles. This could include new programs to enhance the availability of labourers required for ornamental primary production and as well those non-production areas of the industry.

While access to foreign-sourced workers is widely recognized as imperative to the competitiveness and growth of Canada's ornamental horticulture sector, there continue to be ongoing public and political sensitivities related to this issue. This includes the myth that these workers are displacing eager Canadians willing to take on several labour-intensive jobs such as fieldwork and harvesting. The horticulture sector uses significantly more labour than any other agricultural sector. The SAWP and the low wage stream of the TFWP are both critical supports for the sector's ability to access its necessary labour resources and meet the demands of both domestic and international markets.







Skill development and training have not maintained a sufficient pace in recent years. The lack of skilled and lower-skilled labour is threatening the ability

of the industry to grow and remain competitive on the world stage. Ornamental firms are at risk of losing potential workers if they do not invest in training and education programs and other supports that can attract and retain both high and lower-skilled workers that are so badly needed.

In addition, given the pool of well-trained Canadian workers exiting certain higher education programs, there also needs to be a stronger emphasis on attracting the domestic workforce towards many of the management and high-tech-oriented jobs that the ornamental sector offers in areas such as automation, robotics, and greenhouse operations. Growth in these areas will be especially key to enabling the growth of ornamental primary production in Canada where the integration of new technologies reduces the need for expanding the lower-skilled pool that can barely sustain current outputs.

**COHA Member Perspectives:** The recent Nanos survey revealed that COHA members identify staffing issues or not having enough people as the main weakness and threat to the prosperity and sustainability of the entire ornamental horticulture sector (lower-skilled workers in particular). In addition, a strong majority of COHA members say that the ornamental horticultural sector has a major challenge in terms of finding workers domestically. COHA members are also facing increased wage pressures in attracting potential employees in addition to a stronger focus on providing sufficient access to training and education opportunities.

**Primary Strategic Goal:** The Canadian ornamental horticulture sector has access to sufficient labour resources to support ongoing profitable growth in primary production, operations, services, and supply chain segments. It also has the flexibility to adapt and remain competitive as it meets the evolving demands of both domestic and international customers. This is true in both stable and fluctuating market conditions.

#### Key Objectives:

- Consistent access to sufficient levels of high, medium, and lower-skilled labour resources.
- Enhancements to the Employment Insurance (EI) program that better address the issues connected to seasonality (e.g., banking of hours or access to supplemental benefit program for seasonal workers).
- Increased availability and access to robust cost-effective training programs that are directly applicable to the ornamental horticulture sector and help to develop employees that are safer and more productive.
- Greater access to and the application of automation, robotics, and Artificial Intelligence (AI) technology that increases output and productivity in lower-skilled areas (e.g., primary production) without the need to source additional employees.





## Theme #2 - Research and Innovation

Ongoing innovation is imperative to building and maintaining an ongoing competitive advantage in a fast-changing sector such as horticulture. Technology changes, improved production, storage, transportation and marketing practices, mechanization, climate change adaptation, and new business models are examples of areas where research and innovation activities can be mobilized into innovative and successful business practices. New invasive pests are also a constant worry on the minds of ornamental primary producers as well as finding ways to improve plant hardiness and resistance to evolving disease risks.

In addition, keeping up with rapid changes in demand from the marketplace for new varieties and more sustainable production methods is another ongoing pressure for Canada's ornamental sector to ensure it can remain competitive and grow in both domestic and international markets.

Largely due to the limited size of the Canadian market, both private and public investment in Canadian-specific ornamental horticulture research and innovation is relatively limited. Opportunities for innovation specific to Canada are rare because it is more difficult for innovators to earn a return on large investments in research and innovation. Many research activities often benefit the entire ornamental sector and not only a single firm. Among medium and smaller firms in the sector, it is often most cost-effective to finance research activities through mechanisms such as Agriculture and Agri-Food Canada (AAFC)'s ornamental research cluster or other collective industry-government/industry-academia partnerships.

However, it is important to note that several larger businesses finance their research directly on issues that are very specific to them. Some of these firms undertake their own on-site research to address barriers for their company.



These operations would also greatly benefit from additional support to allow them to expand these research activities.

**COHA member perspectives:** The Nanos survey shows that COHA members see research into environmental sustainability and more resilient plants as top priorities to help address issues related to climate change, extreme weather, short growing seasons, and dealing with seasonality. Many of those who completed the survey are concerned about their ability to adapt to changes in climate and environmental sustainability. Another large segment of responses focuses on the need to tackle challenges related to the development of biological and other innovative solutions to disease and pest control, as well as new technologies and automation.

Member respondents were split on whether the ornamental sector is doing a good job or just an average job when it comes to research and innovation with significant room for improvement.

**Primary Strategic Goal:** The Canadian ornamental horticulture sector has access to all the required tools, technologies, and crop protection materials available to be resilient and adaptable in the face of adversities including extreme weather events, climate change, invasive pests and diseases, along with major economic shocks and market fluctuations. Not only is high-impact research undertaken to meet these requirements, but the sector has the means to communicate results broadly and mobilize this knowledge into the hands of those who need it to grow production, enhance profitability, and become more sustainable.





## Key Objectives:

- Increased overall research and innovation capacity for the ornamental sector.
- Research and innovation that enable better productivity, operational capacity, and profitability (e.g., adoption of innovative technologies and automation, resiliency, disease, pest control, labour-related studies).
- Research and innovation that increases the sector's ability to grow markets by responding and adapting to evolving marketplace demands.
- Research and innovation that enables and demonstrates greater environmental sustainability for the sector (energy consumption, water, plastic use, green infrastructure) along with the ability to mitigate and adapt to climate change.



## Theme #3 - Environment and Health

Canadian producers of ornamental horticulture products and related service providers deliver proven solutions to several environmental and climate-related challenges and make important contributions to the health and well-being of Canadians, and the significance of these benefits is often overlooked by policymakers and government officials. There has also been an ongoing lack of recognition of the incredible social and ecosystem services value these products and services deliver, as well as the need to support a strong and sustainable ornamental sector to ensure domestically sourced access to these products is maintained.

Products produced, installed, and maintained by the ornamental horticulture sector provide considerable ecosystem benefits to society. The filtering capacity of ornamental plants and trees improves the quality of air, soil, and water

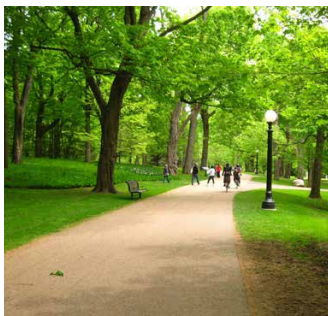
through the removal of toxins, chemicals, and heavy metals. They also absorb and sequester a large amount of carbon dioxide from the atmosphere. Ornamental plants and trees help to reduce soil erosion through bank stabilization and absorption of water and reduce water management and treatment costs by removing nutrients and when used as key elements of sewage and wastewater systems.

These products also enhance the resilience of communities and infrastructure to floods and heatwaves and help to reduce energy consumption in buildings – trees provide shade and windbreaks; green roofs reduce heat loss and help reduce impacts from the urban heat island effect. Ornamental horticulture preserves and increases biodiversity and provides food and habitat to birds and other animals as well as bees, butterflies, and other insects.

In addition, the creation and use of landscaped greenspaces such as parks, trails, and public gardens, the use of indoor plants and flowers, expansion and maintenance of city tree canopies,



and home gardening provide countless proven human benefits. This includes green spaces that enhance healthy lifestyles with physical exercise and other recreational activities, better mental and emotional health, positive mood, and reduced stress, along with enhancing and improving our living spaces by adding fragrance and visual beauty.



Ornamental primary producers have many opportunities to become even more efficient and environmentally sustainable while reducing the carbon intensities

of their operations and integrating innovative technologies and environmental best practices into their operations including water and energy management and the use of plastics for transportation and packaging. Some of these solutions are expensive or hard to access because they are sourced from overseas.

Underlying all related environmental efforts must be a commitment that as Canada moves toward a net-zero carbon future, the Canadian ornamental horticulture sector needs to be a full partner in that pursuit.

**COHA Member Perspectives:** COHA members say that educating the public to grow their own plants or food is a great opportunity for the ornamental sector. Promoting the benefits of plants, trees, and green spaces in cities and urban agriculture were also mentioned as important elements for success. There is also a clear need identified to improve the sector's environmental performance including reducing the carbon footprint of operations and reducing the use of plastics. When it comes to suggested actions, survey respondents most often mention better water and energy management.

**Primary Strategic Goal:** Achieve long-term sales growth of ornamental products and services resulting from a sector-wide reputation for world-class environmental performance and as a significant contributor to the reduction in carbon emissions. Increased consumption of ornamental products and services is also achieved through greater use to address both the physical and mental health of Canadians and the beautification of urban environments.

#### Key Objectives:

- Greater awareness and recognition by policymakers and government officials of the full spectrum of environmental solutions and benefits delivered by plants, flowers, trees, and green spaces, resulting in increased sales of ornamental products and services.
- Greater awareness and recognition by policymakers and government officials of the full spectrum of benefits for the health and well-being of Canadians delivered by plants, flowers, trees, and green spaces resulting in increased sales of ornamental products and services.
- Government policies and programs that enable the Canadian ornamental horticulture sector to become active partners in achieving public sector environmental and health-related goals.
- Increased government support for helping ornamental growers and service operators become more sustainable by adopting new environmental technologies and less carbon-intensive practices.







## Theme #4 - Risk Management

Whether it is from market shocks and fluctuations, natural disasters, invasive pests, or trade dependences and disruptions, like all agricultural sectors in Canada, the ornamental horticulture sector is full of risks. While some of these risks are managed primarily in the hands of industry members, the solutions for many of them require governments to provide the policy, regulatory, and program tools needed to address them.

When it comes to Business Risk Management (BRM), many of Agriculture and Agri-Food Canada's programs do not adequately address the specific needs of Canada's ornamental industry. This is often because of variables such as long production cycles for many products such as trees, peak season inventory and sales cycles (spring), cost of destruction, key event triggers, the scope of coverage for pests/disease, market fluctuations, and natural hazards, are not considered in BRM program development. If enhanced to meet the needs of ornamental growers, BRM programs available through Agriculture and Agri-Food Canada can provide meaningful safety nets in times of natural disaster and major market disruptions like we have seen during the COVID-19 pandemic.

As the scale and investment into agriculture have continued to grow, AgriStability has not kept pace. The program's \$3 million cap on payments for losses in a year is out of touch with modern risks, resulting in many ornamental farms being likely to immediately hit the AgriStability cap on payments should any sizeable loss be incurred. Many of the producers in the sector have a highly seasonal crop that is produced on a schedule to meet specific holiday targets throughout the year. This is particularly the case with greenhouse floriculture producers who sell large volumes for key holidays (e.g., Valentine's Day, Mother's Day, and Easter). If products cannot be sold during these windows, the losses to the sector are catastrophic and could lead to major liquidity challenges and insolvencies. The seasonal market dynamics involved with the production of many ornamental products mean that a key aspect of BRM program design is to ensure that the funds needed by growers can get to them in a timely fashion.

Another challenge that is impacting how ornamental growers can mitigate risk is the need to develop a new set of commodity codes for horticulture for use in AAFC's Advanced Payment Program (APP) and AgriStability inventory reporting. These codes need to be aligned and unified between the two programs while also simplified, reduced in number, and made clearly understandable to growers. The goal is to remove an impediment to ornamental grower





participation and reduce program dropouts from frustration with the programs. This will also be of benefit to both AAFC and Statistics Canada with the availability of a more useful and logical set of data. Reporting of Proof of Sales also needs to be drastically simplified for ornamental horticulture or eliminated entirely. The sector has thousands of products some of which keep growing beyond the end of the year (e.g., trees). This makes it nearly impossible to track every item in direct correlation to specific loans.

Constantly shifting threats from plant pests, diseases, and climate-related growing conditions present a significant barrier to the viability and growth of Canada's ornamental horticulture producers. Without ready access to safe and effective crop protection and fertilizer products, the ability for growers to manage these risks effectively and save their crops from destruction is removed almost completely. Removing the regulatory burdens and speeding up timelines for getting the approval of these products must be a top priority for the federal government and the ornamental industry must be fully prepared to work with the relevant authorities to enhance the efficiency of associated processes.



Trade-related risks including those emerging from phytosanitary issues are also a key priority for the ornamental sector. Too many export opportunities are missed and too many trade disruptions (both input supplies and exports) are allowed to occur or get worse because of a combination of insufficient Government of Canada resources, ineffective priority setting, or not having the industry involved at earlier stages of the issue. Ornamental sector representatives need to be invited to participate in trade-related activities from the start and kept in the loop along the way. Industry members must also keep themselves fully informed and ready to help government officials in any way they can to achieve the best possible outcomes.

**COHA Member Perspectives:** A significant percentage of COHA member survey respondents said that government policies and regulations (federal, provincial, and municipal) are a major risk to the success of their business, with regulations being mentioned as the biggest obstacle.

### Primary Strategic Goal:

Members of the Canadian ornamental horticulture sector are fully prepared and empowered to manage the risks within their control because government frameworks, regulations, and programs have been amended and redesigned to better manage all the other risks that the industry faces. Ornamental industry organizations and leadership are fully engaged with all relevant departments and agencies and proactively invited to participate in key consultations and decision-making processes.

### Key Objectives:

- Awareness and recognition by elected officials and public servants of the unique challenges related to crop failure and damage faced by ornamental producers (greenhouse production methods and related infrastructure costs, hail, floods, extreme temperatures, etc.).
- Modifications to existing government insurance and recovery programs (BRM) or development of new sector-specific programs (e.g., raising AgriStability cap to at least \$5 million, reference margin increased to 85% nationally, interim payouts raised to 75%).
- Full consideration of ornamental horticulture sector needs is reflected in the next iteration of AAFC's agriculture policy framework.
- Better access to cost-effective fertilizer and crop protection products that reduce production-related risks, increase yields, and ensure the long-term competitiveness of Canadian growers.





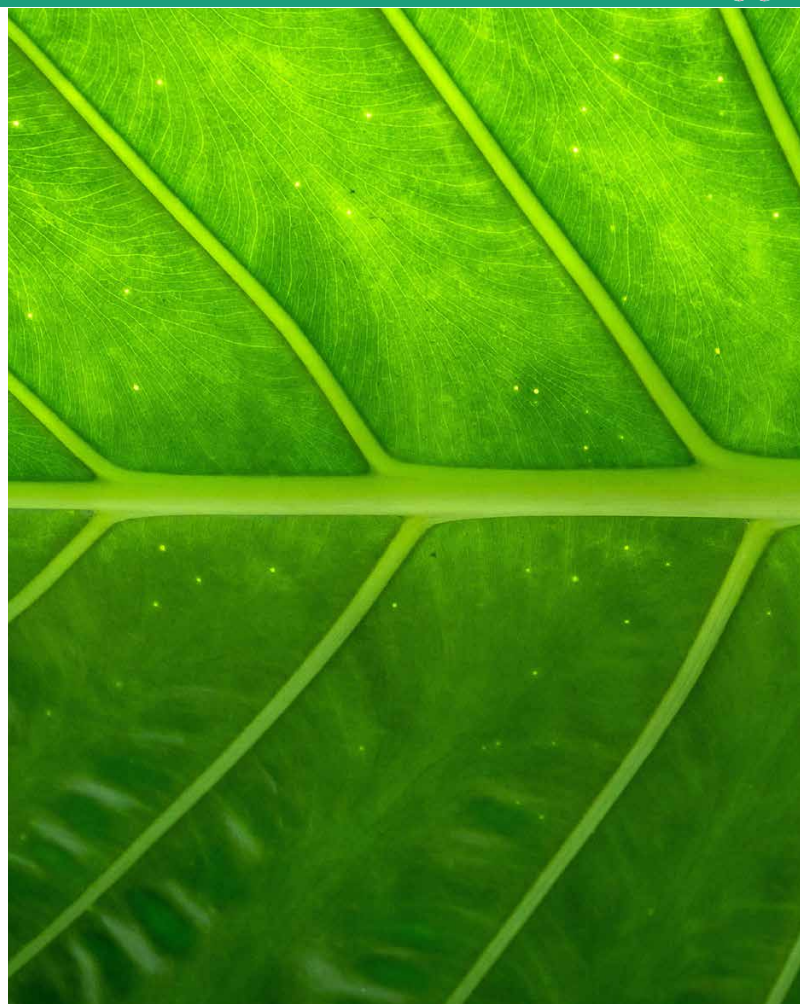
# Summary

COHA is not developing a new strategy for the ornamental sector just to say we did it. There is a strong rationale and clearly defined goals and objectives that industry members want to achieve which call for a robust strategic approach and proven tactics to ensure success. One that is designed to be high-impact and achievable. One that encompasses all stakeholders and assigns responsibility for action to each. One that is guided by a renewed vision for the sector and time-bound to demonstrate meaningful results.

This is a roadmap to a stronger, resilient, and more responsive industry that is positioned for growth and prosperity for many decades to come. A real plan for the sector and policymakers to address new and long-standing key issues surrounding labour, research and innovation, the environment and health, as well as risk management.

When it comes to the specific needs of the ornamental horticulture sector in Canada, federal government policies, regulations, and programs should be tools for growth and prosperity and not barriers and red tape.

The development and revision of agricultural and other relevant policies, regulations, and business risk management programs must be informed and reflective of the unique challenges faced by producers and service providers in Canada's ornamental horticulture sector. Relevant government actions that ignore the specific needs of the sector should be examined and modified accordingly. These changes should focus on helping businesses to grow, mitigate risks, gain a competitive advantage in global markets, and enhance their capacity to be sustainable.



Now is the time for an accurate framing of the issues and desired outcomes, prioritization of actions, and empowering industry members with consistent messages that will resonate with policymakers and government officials, industry stakeholders, and even the public. Time to get everybody on the same page and craft the tools necessary to obtain the desired results.

Clear vision. Shared goals. Common voice. Effective actions. An informed and engaging roadmap to unify Canada's ornamental horticulture stakeholders and position the sector for maximum growth and sustainable prosperity into the next decade. This is what COHA's Greener Horizons 2030 strategy is all about.