NARRATIVE RESEARCH

Tree Nursery Interviews

June 2025

Prepared for:

New Brunswick Environmental Network

Réseau environnemental du Nouveau-Brunswick



Background and Methodology

Research Background, Objectives and Methodology

The New Brunswick Environmental Network (NBEN), in partial fulfillment of the requirements of the funding received through the 2 Billion Trees program, seeks to comprehensively understand the tree nursery market, specifically the availability of native New Brunswick trees, in the region. With that in mind, NBEN commissioned Narrative Research to undertake qualitative research to better understand perceptions of tree growers and sellers in the New Brunswick and surrounding areas.

Key Objectives

- Understand customer demand for indigenous trees.
- Understand the types and quantities of indigenous trees available to the New Brunswick market.
- Explore barriers faced by nurseries in sourcing, growing, and selling specific tree species that are indigenous to New Brunswick.
- Understand what could be done to support and motivate tree nurseries to produce more varieties of trees indigenous to New Brunswick.

This summary report presents the key findings from the qualitative research undertaken by Narrative Research on behalf of the New Brunswick Environmental Network and includes a description of the research methodology, a summary of findings, and an analysis of the in-depth interviews.

Approach

13 in-depth telephone interviews were conducted.

May 21 – June 13, 2025

Across participants, five (5) were located in NB, four (4) in NS, two (2) in PE, and two (2) in QC.

Each session lasted approximately 30 minutes.

11 interviews were conducted in English, while two (2) were conducted in French.

Target Audience

Participants included owners and operators of tree nurseries in New Brunswick and surrounding provinces.

Incentive

In appreciation for their time, and as an incentive to take part in the research, each participant was provided a monetary incentive of $150.

The primary benefits of qualitative discussions are that they allow for in-depth probing with qualified participants on their opinions, perceptions and attitudes on a specific subject matter. Qualitative research allows for more complete understanding of the segment in that the thoughts or feelings are expressed in the participants' "own language" and at their "own levels of passion." Qualitative techniques are used in marketing research as a means of developing insight and direction, rather than collecting quantitatively precise data or absolute measures. As such, results are directional only and cannot be projected to the overall population under study.

Summary of Objectives and Key Findings



Three Takeaways

1

Nurseries commonly carry approximately thirty varieties of indigenous trees.

Local nurseries are carrying an assortment of trees indigenous to New Brunswick and are typically able to meet the growing demand. In fact, the majority of trees grown at most nurseries – except for some fruit and ornamental varieties – are indigenous. That said, nurseries typically stick to growing those varieties that they know are most common and reasonably expect will sell. There is a common feeling that they can grow any variety of tree but are cautious about investing in infrastructure and learning if they do not have reasonable assurance of a sale in the end.

2

Difficulty predicting future demand discourages nurseries from growing certain tree species (the ones where they are unsure of future demand).

Because trees have to be grown for a minimum of two years before they are ready for sale, nurseries must attempt to predict what varieties of trees will be in demand well in advance of when the sale will occur. In the absence of long-term contracts and upfront payment, nurseries would take on a great deal of risk by growing rarer varieties of trees, which sometimes means large order of specific species cannot be met if not known about in advance.

3

Nurseries advocate for long-term relationships with buyers and more public education.

Established relationships with buyers who place recurring or advanced orders are expected to help increase predictability of demand and encourage nurseries to adapt their processes to grow a wider variety and quantity indigenous trees. Other efforts to increase public awareness of the utility and beauty of indigenous trees are also expected to help increase this demand, and thus, encourage nurseries to increase supply going forward. The largest operation included in the sample has long term customers and enjoys long lead times for firm orders – resulting in less risk and a streamlined operation.

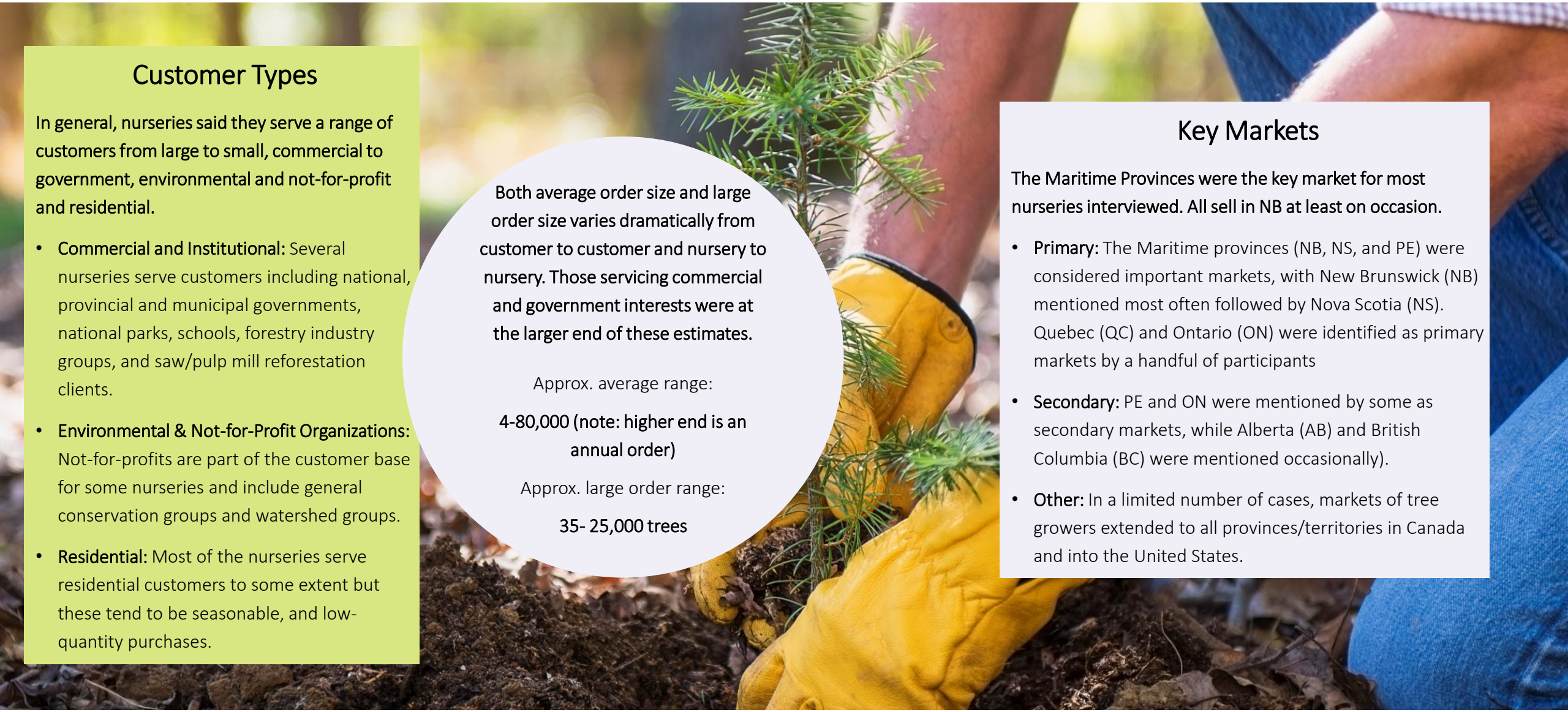
Summary of Objectives and Key Findings

Objectives	Key Findings
Understand customer demand for indigenous trees.	In general, local nurseries are able to keep up with customer needs, despite the uptick in demand for indigenous trees in the last several years. Given that nurseries said they will grow in the range of 5,000-19,000,000 trees this year and bring in hundreds of additional trees, most do not experience challenges fulfilling what they would consider a large order (anywhere from 35-25,000 trees). That said, some species are more difficult to provide than others and smaller nurseries that grow limited varieties expressed some difficulty meeting more niche demands. That said, nurseries find ways to avoid turning customers away whenever possible, most often by leveraging their community networks of nurseries and farmers to fill gaps when they occur.
Understand the types and quantities of indigenous trees available to the New Brunswick market.	On average, nurseries said they carry in the range of ~30-40 types of trees, with approximately 80% of their stock being indigenous. Additionally, most nurseries carry majority hardwood varieties. A wide selection of indigenous trees are available to the NB market, but there remain some gaps in specific varieties. In particular, indigenous ash, birch, cherry dogwood, hazel, maple, oak, and spruce varieties were commonly carried by tree nurseries in the region, while multiple varieties of alder, aspen, juniper, pine, serviceberry, viburnum and willow were not.
Explore barriers faced by nurseries in sourcing, growing, and selling specific tree species that are indigenous to New Brunswick.	Nurseries faced various challenges from sourcing and growing specific species, to the long runway and degree of high uncertainty involved in committing investment to particular species. Seed availability as well as growth and germination issues with certain species can limit nurseries in the types and quantities of indigenous trees they sell. Nurseries remarked that the long lead times necessary to grow trees to a reasonable maturity for sale can lead to a host of other issues like unpredictable demand, leading to concerns about investing in the appropriate infrastructure to grow indigenous trees, especially without an advance on the necessary capital.
Understand what could be done to support and motivate tree nurseries to produce more varieties of trees indigenous to New Brunswick.	Nurseries advocate for establishing relationships with buyers, educating the public, and increasing programming to collectively drive demand predictability and grower capabilities of native trees. Smaller nurseries that mainly serve the residential market do not enjoy the same level of security as the larger nurseries with more of a commercial focus. Continuous education about the importance of growing indigenous plants was also suggested as a pathway to increasing residential demand and therefore a more sustained market for indigenous trees.



Detailed Findings

Customer Profile



Customer Types

In general, nurseries said they serve a range of customers from large to small, commercial to government, environmental and not-for-profit and residential.

- **Commercial and Institutional:** Several nurseries serve customers including national, provincial and municipal governments, national parks, schools, forestry industry groups, and saw/pulp mill reforestation clients.
- **Environmental & Not-for-Profit Organizations:** Not-for-profits are part of the customer base for some nurseries and include general conservation groups and watershed groups.
- **Residential:** Most of the nurseries serve residential customers to some extent but these tend to be seasonable, and low-quantity purchases.

Both average order size and large order size varies dramatically from customer to customer and nursery to nursery. Those servicing commercial and government interests were at the larger end of these estimates.

Approx. average range:

4-80,000 (note: higher end is an annual order)

Approx. large order range:

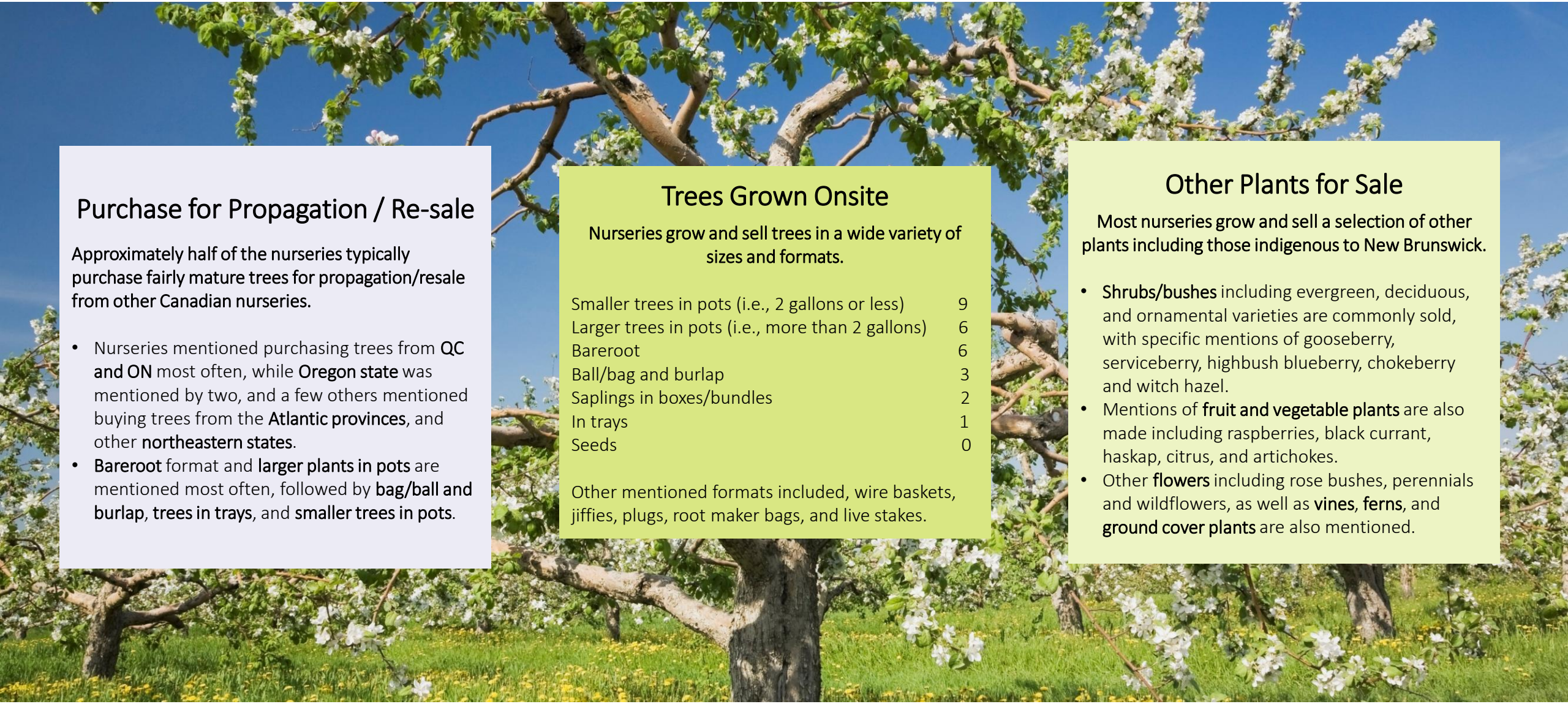
35- 25,000 trees

Key Markets

The Maritime Provinces were the key market for most nurseries interviewed. All sell in NB at least on occasion.

- **Primary:** The Maritime provinces (NB, NS, and PE) were considered important markets, with New Brunswick (NB) mentioned most often followed by Nova Scotia (NS). Quebec (QC) and Ontario (ON) were identified as primary markets by a handful of participants
- **Secondary:** PE and ON were mentioned by some as secondary markets, while Alberta (AB) and British Columbia (BC) were mentioned occasionally).
- **Other:** In a limited number of cases, markets of tree growers extended to all provinces/territories in Canada and into the United States.

Products for Sale



Purchase for Propagation / Re-sale

Approximately half of the nurseries typically purchase fairly mature trees for propagation/resale from other Canadian nurseries.

- Nurseries mentioned purchasing trees from **QC and ON** most often, while **Oregon state** was mentioned by two, and a few others mentioned buying trees from the **Atlantic provinces**, and other **northeastern states**.
- **Bareroot** format and **larger plants in pots** are mentioned most often, followed by **bag/ball and burlap**, **trees in trays**, and **smaller trees in pots**.

Trees Grown Onsite

Nurseries grow and sell trees in a wide variety of sizes and formats.

Smaller trees in pots (i.e., 2 gallons or less)	9
Larger trees in pots (i.e., more than 2 gallons)	6
Bareroot	6
Ball/bag and burlap	3
Saplings in boxes/bundles	2
In trays	1
Seeds	0

Other mentioned formats included, wire baskets, jiffies, plugs, root maker bags, and live stakes.

Other Plants for Sale

Most nurseries grow and sell a selection of other plants including those indigenous to New Brunswick.

- **Shrubs/bushes** including evergreen, deciduous, and ornamental varieties are commonly sold, with specific mentions of gooseberry, serviceberry, highbush blueberry, chokeberry and witch hazel.
- Mentions of **fruit and vegetable plants** are also made including raspberries, black currant, haskap, citrus, and artichokes.
- Other **flowers** including rose bushes, perennials and wildflowers, as well as **vines**, **ferns**, and **ground cover plants** are also mentioned.

Tree Inventory



Tree nursery operations in the region range in size dramatically, but are far more likely to grow their own trees than bring them in.

Expected # Trees *Grown* in 2025

*5,000 – 19,000,000

*One does not grow

Expected # of Trees *Brought in for Resale* in 2025

*400 - 3,000

*Six do not bring in

Q7, Q8, Q13, Q14

Variety: Nurseries had anywhere from half a dozen to 400 species of trees depending on their size.

The median is around ~30-40 types

Meeting Demand

Some nurseries can supply large quantities of indigenous trees, particularly if they receive advance notice or have established long-term relationships with clients. Nurseries that are smaller in size have more difficulty meeting demand, while for others, it will depend on the species and size of trees required, with more common types and smaller sizes being more feasible. Several nurseries mentioned that there is a growing demand for native trees.

Nurseries are more likely to carry **hardwood** trees than **softwood**

Medians

75% hardwood

25% softwood

Nurseries carry far more **trees indigenous to NB** than those that are not.

Medians

80% indigenous

20% non-indigenous

Non-indigenous trees typically include **ornamental**, **fruit-bearing**, climate/ wildlife resilient species.

Tree Inventory – Indigenous Trees

A wide selection of indigenous trees are available to the NB market, but there remain some gaps in specific varieties

Of the 13 tree nurseries interviewed, 11 provided details of the specific New Brunswick indigenous tree species they will carry in 2025.

- Indigenous ash, birch, cherry, dogwood, hazel, maple, oak, and spruce varieties were **commonly carried** by tree nurseries in the region. Specifically, Northern red oak and black walnut were **mentioned most often**.
- Other commonly carried types included Eastern white pine, highbush cranberry, American elm, butternut, Eastern hemlock, ironwood, and staghorn sumac among others.
- Species **carried less often or not mentioned** included varieties of alder, aspen, juniper, pine, serviceberry, viburnum and willow. One nursery mentioned that they do not distinguish between different types of serviceberry or willow trees.
- Additionally, **no nurseries interviewed** mentioned carrying Alder-leaved buckthorn or Canada yew.

Commonly Sold

- Black Ash
- Mountain Ash
- Yellow Birch
- Paper/White Birch
- Pin Cherry
- Black Cherry
- Chokecherry
- Alternate-leaved Dogwood
- Red Osier Dogwood
- Beaked Hazel
- American Hazelnut
- Striped Maple
- Red Maple
- Silver Maple
- Sugar Maple
- Eastern White Pine
- Bur Oak
- Northern Red Oak
- White Spruce
- Black Spruce
- Red Spruce
- Wild Raisin
- Highbush Cranberry
- Pussy Willow
- American Beech
- American Elm
- Balsam Fir
- Black Walnut
- Butternut
- Eastern Hemlock
- Eastern White Cedar
- Ironwood
- Staghorn Sumac
- Tamarack

Limited Sellers

- Green Alder
- Mountain Alder
- Speckled Alder
- Smooth Alder
- White Ash
- Red/Green Ash
- Large-toothed Aspen
- Trembling Aspen
- Grey Birch
- Bog/Dwarf Birch
- Round-leaved Dogwood
- Common Juniper
- Creeping Juniper
- Mountain Maple
- Jack Pine
- Red Pine
- Pitch Pine
- Downy Serviceberry
- Bartram's Serviceberry
- Canada Serviceberry
- Nannyberry
- Hobblebush
- Northern Arrowwood
- Bebb's Willow
- Sandbar Willow
- Black Willow
- Bog Willow
- Balsam Poplar
- Common Winterberry
- Hawthorn
- White Basswood/Linden
- White Elm

Not Mentioned

- Silky Dogwood
- Dwarf Juniper
- Fernald's Serviceberry
- Gaspé Serviceberry
- Inland Serviceberry
- Purple Serviceberry
- Smooth Serviceberry
- Round-leaved Serviceberry
- Running Serviceberry
- Squashberry
- Southern Arrowwood
- Sage Willow
- Cottony Willow
- Upland Willow
- Shining Willow
- Bayberry Willow
- Blueberry Willow
- Satiny Willow
- Autumn Willow
- Alder-leaved Buckthorn
- Canada Yew

Challenges and Barriers

Nurseries face various challenges from sourcing and growing specific species, to the long runway and degree of high uncertainty involved in committing investment to particular species.

Seed Availability: Finding seed stock is a primary challenge to growing certain species of indigenous trees. Nurseries mentioned a desire to gather seeds themselves for indigenous species, or at the very least source, them locally. Options for sourcing seeds are limited to reliance on seeds released from the provincial stock, competing with wildlife to gather seeds, or sourcing seeds from other local sellers. In particular, some nurseries cited challenges with serviceberry, viburnum, birch (yellow), maple, black ash, and beaked hazel.

Growth and Germination Issues: Select indigenous species are more difficult to grow than others. In particular, nurseries mentioned that the American linden and yellow birch are difficult to germinate, while ironwood was named as being hard and slow to grow.

Lead Times: Given the long lead times required to grow a tree to reasonable maturity for sale, nurseries have to be able to predict what kinds of trees they expect to sell years (at least two on average) in advance. The factor comes with a host of related challenges:

If I don't know it, I can't grow it!

Unpredictable Market Demand: In some cases, a lack of consistent demand for native tree species discourages nurseries from adapting their product offerings to include more indigenous varieties. This creates challenges for nurseries to deliver on larger orders of specific types of trees if the demand for a type of indigenous tree suddenly shifts.

We carry a lot of risk holding inventory.

Investment in Infrastructure and Resources: Infrastructure investment (greenhouses, space requirements, watering equipment) is necessary for some nurseries to source and grow specific and/or a wide variety of indigenous tree species, but this can come at a large expense. If demand for specific trees is not known well in advance, the investment needed may not be deemed possible.

Financial Barriers: To commit to the investment in the face of uncertain demand, nurseries require capital. However, the lack of available contracts with upfront payments poses a barrier to some nurseries' financial security, sometimes preventing them from growing certain types of indigenous trees – especially trees they have not grown before.

Suggested Solutions

Nurseries advocate for establishing relationships with buyers, educating the public, and increasing programming to collectively drive demand predictability and grower capabilities of native trees.

Long-term commitments: Multiple nurseries suggested that long-term commitments of 2-4 years would provide them certainty and stability, encouraging them to produce more indigenous trees. That is, regular and firm orders, as well as multi-year contracts would help make demand more predictable.

Relationship between the grower and the client is very long term and there should be a lot of communication.

It takes someone going in and being a champion for these plants.

Education and Awareness: Although several mentioned that residential demand for indigenous species is growing and bolstering demand, some noted that there is still work to be done. Educational initiatives like garden club talks and workshops can highlight the utility and beauty of indigenous tree species as well as myth busting about wildlife and pest-related concerns, thus raising awareness and interest. Some nurseries mentioned that government organizations should be taking more of a leading role in this educational processes.

Market Development: More than one nursery credited the 2 Billion Trees Program as having a positive impact on the demand for indigenous trees, increasing predictability of the market demand. Similar large-scale environmental projects such as this are expected to help improve sales and motivate nurseries to focus on indigenous species. Additionally, one nursery mentioned support for developing the residential market with a program offered by their town that provides rebates to residents who purchase and plant indigenous trees.

Funding and Financial Support: Some nurseries mentioned that financial support could be provided to nurseries to cover costs and reduce risks associated with producing indigenous trees. Funding, accessible to all nurseries regardless of size or type of ownership, for infrastructure, labor, training, and skills development is expected to help lessen the risk. Upfront payments for long-term contracts are also a welcomed solution.

Reliance on community: If nurseries cannot meet the demand for a certain species of trees, current practice is to order from or refer customers to other nurseries for supply. Nurseries also mentioned have relationships with local farmers, which help ensure adequate supply.



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Every insight tells a story.