



2017

The Year in Review

State of the Greenhouse Horticulture Industry

The past year has been anything but boring – once again! Today's world is changing every minute: society progresses and people evolve along with it, but they still pass their knowledge and fundamental values on to the next generation. Consumer expectations are also changing, with consumers now demanding higher quality, greener products and sustainable production processes. All of these factors are leading the horticulture industry

to constantly raise its standards, and to move in new, undreamed-of directions. But that's the beauty of our dynamic industry. It's what makes us love our work and keeps us excited about our journey every single day.

We feel that 2017 was a turning point for how we should view the future, so by way of introduction to this annual review edition of the Berger Press, we would like to present the following overview of industry statistics, which reveal the business opportunities the future holds for all of us – if we are clever enough to seize them!

“ [According to 2016 forecasts,] the horticultural market in the Americas is expected to reach \$7.42 billion by 2021.

The Americas is witnessing a steady growth in the greenhouse horticulture market with most of the contribution coming from the US, Canada, and Mexico. The greenhouse horticulture market in the region is growing owing to the high yielding demand for horticultural products in comparison to traditional agricultural products. The US has lots of opportunities to increase the demand for agricultural products in the country.

Agreements between researchers and growers allow tailored solutions that fit the exact requirements of growers across the region. In 2016, the US collaborated with Mexico along with Canada to supply tomatoes, a major greenhouse horticultural crop produced during the winter season. Canadian farmers are adopting greenhouse horticulture due to drought conditions and supply shortages. ”

(Technavio, 2017)

Global Greenhouse Horticulture Market 2017-2021: Key Geographies and Forecasts by Technavio*. Reperated at <http://www.businesswire.com/news/home/20170713006114/en>
Global-Greenhouse-Horticulture-Market-2017-2021-Key-Geographies



Exceptional Berry Production in Containers

Among the various horticulture R&D programs Berger participates in with various organizations, one particular project promises outstanding results in the short term. Since early 2016, Berger, in collaboration with Laval University and professional strawberry grower in Québec, has been working on new strawberry growing systems, specifically container growing. This study was initially set to run for four years, but the results are already compelling.

Compared to the traditional methods of **strawberry production** in open fields, plants, **grown under high tunnels** in Berger's soilless substrate, yield significantly more fruit.

For some cultivars, the productivity per plant is 2 or 3 times higher when grown in tunnels.

That more than justifies using this approach!

Although soilless strawberry production presents its share of technical challenges, when all the factors are well controlled, the system yields fruit of exceptional quality and high production density.

This research offers greenhouse growers a major new opportunity. Stay tuned for a burst of berries in 2018!

2017 Berger Timeline

January

February

March

April

May

June



Acquisition

Berger acquires Specialties Robert Legault (SRL), the exclusive distributor of Berger products for the past **36 years**. This transaction merged SRL's dedicated team of Canadian sales representatives with direct access to Berger's broad expertise and range of services.

Top 100 Growers

TOP 100
Growers

With the unveiling of Greenhouse Grower's list of the Top 100 Growers for 2017, Berger is proud to note that **33 companies** on this prestigious list are among our customers and partners!

For more than 30 years, Greenhouse Grower has ranked the largest greenhouse growers in the U.S. by total greenhouse space, including survey data on total acreage in shade houses and fields, investments in technology, environmental concerns and customer service procedures. The results demonstrate the industry's ongoing efforts to raise quality standards and stay a step ahead of the market's constantly expanding needs.

Acquisition

Tourbière Henri Théberge & Associés Inc., a peat producer based near Berger's headquarter in Quebec was Berger's second acquisition in 2017. This alliance enables Berger to consolidate its harvesting activities in Saint-Modeste, helping to ensure a reliable supply of retail peat. Berger is also committed to honoring all orders placed by the current customers of Tourbière Henri Théberge for the 2017 season.



How Consistency Means \$\$\$

Performance is one of Berger’s four core values and our overall mission is to exceed industry standards, so nothing is left to chance when it comes to offering top quality growing media. Consistency is part of our everyday vocabulary, and to keep our commitment to our customers by delivering consistent products, we never stop testing them under different environmental conditions and management methods. The performance of our products is always compared to that of similar mixes from our competitors in order to make honest comparisons.

The following greenhouse study was conducted with our BM6 All Purpose blend, comparing it with eleven similar mixes from four of our best-known competitors.

Physical Characteristics

#10 Sieve Particle Size

The largest variation for all Berger BM products is 10%, compared to 12–24% for mixes from the competition. This means **superior uniformity, better irrigation control and more predictable results** for Berger’s customers.

Initial Water Content

Consistently maintained at optimal rates, the initial water content of BM6 is easier to adjust prior to potting and allows Berger to maximize packaged volume thus **minimizing transportation costs**. In comparison, the initial water content of mixes from our competitors is 2 to 7 times more variable.

Price

As mentioned above, by keeping the initial water content low, Berger can reduce the weight of its product and thus minimize shipping costs. However, it is important to adjust the water content before potting, not only to improve water distribution during irrigation, but also to optimize the porosity in containers and increase the useable volume per unit. At the optimal moisture content for potting (55-65%), a 3.8 ft³ bale of BM6 yields 8.8 ft³ of loose mix, on average. That is 5 to 35% more than our competitors. **A less expensive bale doesn’t necessarily mean a lower cost per ft³ of mix.**

Chemical Characteristics

pH & Nutrients

The chemical characteristics of soilless growing media, particularly **pH, are crucial for a successful production.**

Inconsistent pH or an unbalanced nutrient content can lead to uneven plant growth, undesirable stretching or widespread stunting. Berger’s quality control guarantees that the initial starter charge of fertilizer is always well adjusted and the initial incubated pH (7 days) is always within a range of 0.8 for nearly all of our products. The incubated pH for our competitors’ mixes can be up to 3 times more variable.



A 3.8 ft³ bale of BM6 yields 8.8 ft³ of loose mix, on average.



Inspiring Sponsorship

Cabano’s high school has carried out a revolutionary school horticultural project. Created and maintained entirely by students, the two greenhouses and outdoor garden produced almost 6 tons of vegetables in 2017. This abundant harvest provided afternoon snacks to **400 students**, fed families in the need and supplied community kitchens. Berger is proud to be part of this inspiring success story. The company has supplied all the growing media over the last 4 years and will continue to do so for years to come.

Happy Holidays

Every Holiday Season, the entire Berger team takes time to thank all our customers, collaborators and distributors for their trust, confidence and support. This year was slightly different, as our traditional holiday cards were transformed into a green initiative and replaced by young trees. We sent over **2,000 evergreens** seedlings to members of the horticulture industry throughout Canada and the United States as a symbolic gesture celebrating our partnership.

Performance		September	October	November	December
July	August				

Higher Productivity

A new peat screening system was added to the existing processing line at our California mixing plant. Beyond the improved performance yielding consistent blends of the various components, this addition resulted in a significant quality upgrade and increased fineness of our propagation mixes. The new equipment helps maintain the highest production standards for growing media while boosting productivity.



Thanksgiving

For Berger, Thanksgiving was the perfect opportunity to take action and help in the recovery efforts for communities affected by Hurricane Harvey. The Pay it Forward campaign invited growers and other members of the horticulture industry across the U.S. to download our technical training guides and turn it into a good deed. For every download, **Berger donated \$1** to charities vetted by CNN's Impact Your World that are helping in Harvey’s immediate aftermath and will continue helping throughout the long-term recovery. The participation of hundreds of horticultural professionals in this initiative led to a

\$3,000

donation by Berger.

Together, we make a difference.



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