

The Nursery and Landscape Industry's Impact on Florida's Economy



A GROWING INDUSTRY'S GROWTH SOARS



F N G L A

FLORIDA'S NURSERY & LANDSCAPE

INDUSTRY CONTINUES TO PROVE

big ECONOMIC IMPACT



Florida's nursery and landscape industry encompasses a wide range of businesses, including nurseries and greenhouse growers; lawn and garden suppliers; equipment manufacturers; landscape design, installation and maintenance services; lawn and garden stores; and other retail establishments selling plants and related lawn and garden goods. Florida is a leading state, ranked second only to California in the US in terms of overall industry value. Nursery crops are one of the largest agricultural commodity groups in Florida, along with fruits, vegetables and forest products. This study, utilizing 2005 data, shows significant growth for Florida's nursery and landscape industry since its last analysis in 2000.

SPECIAL THANKS TO THE FOLLOWING FOR SUPPORTING THIS STUDY:

Farm Credit Associations of Florida

FNGLA

And the following FNGLA Chapters – Action, Central East Coast, Coastal Springs, Frontrunners, Highlands Heartland, Lake Region, Miami-Dade, Royal Palm, Treasure Coast, as well as the Tampa Bay Wholesale Growers

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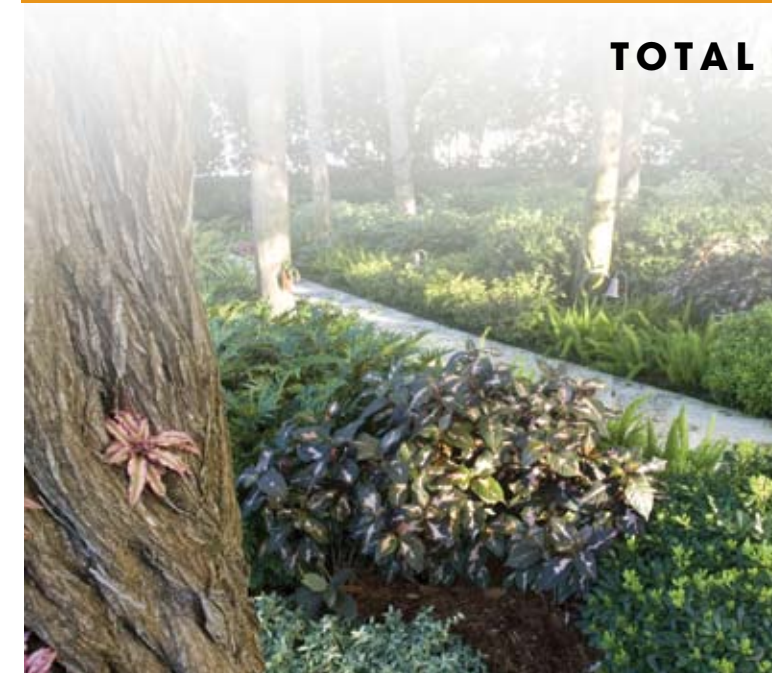


Business Sales

In 2005, total sales by Florida nursery, landscape service firms and horticulture retailers were \$15.2 billion. Sales skyrocketed in comparison to sales in 2000, growing by 54%.



SEGMENT	SALES (\$B)
NURSERY GROWER SALES	3.007
LANDSCAPE SALES	5.255
GARDEN CENTER RETAIL SALES	6.971
TOTAL	\$15.23 BILLION



From 2000 to 2005, nursery sales grew by 34%, landscape sales grew by 69% and retail sales grew by 91%.

TOTAL SALES FOR FLORIDA'S NURSERY & LANDSCAPE INDUSTRY:

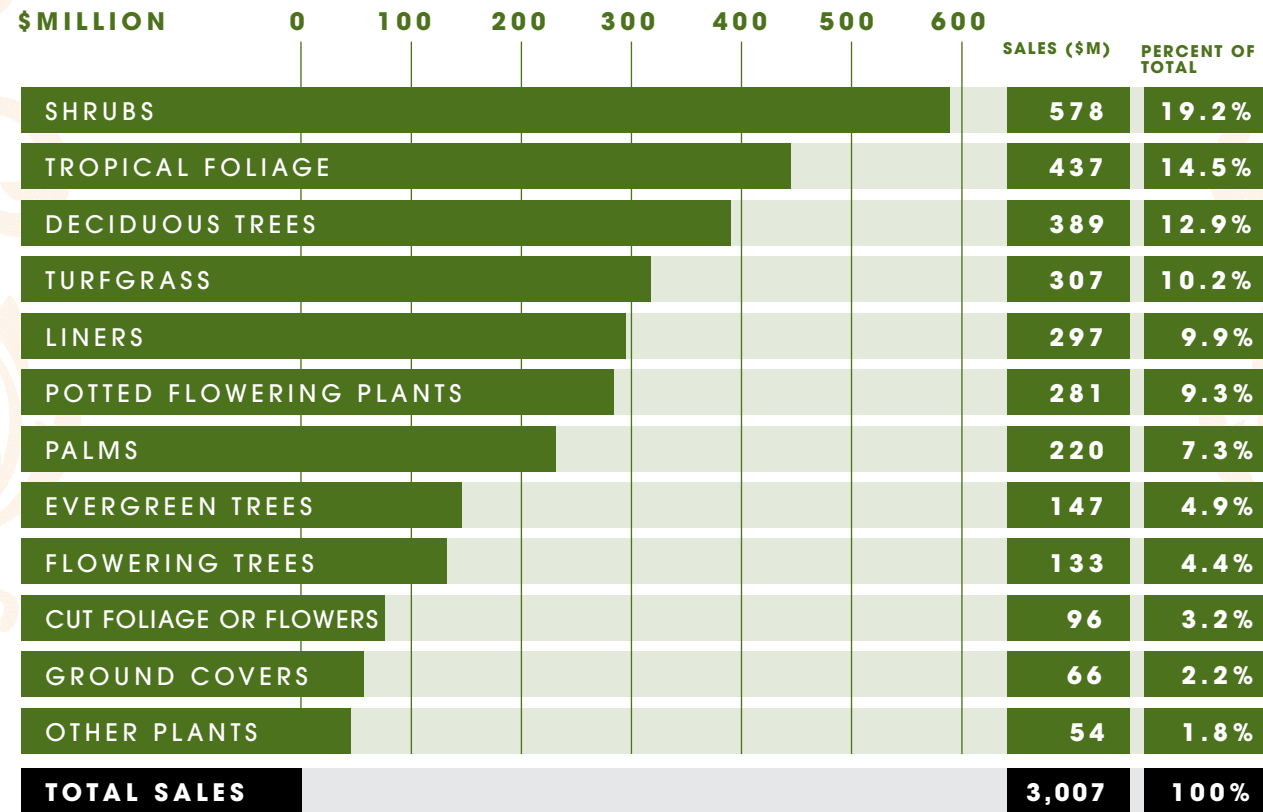
\$15.2 billion!

Nursery Product & Service Values

Sales of specific nursery products and services show the largest selling crops were shrubs (\$578 M), representing 19% of total nursery sales, followed by tropical foliage (\$437 M), representing 14% of total nursery sales and deciduous trees (\$389 M), representing 13% of total nursery sales.



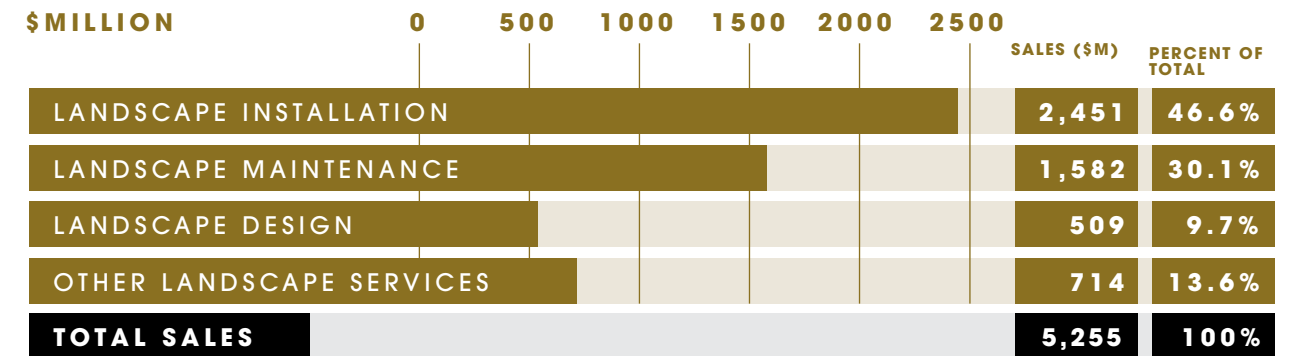
Nursery Growers



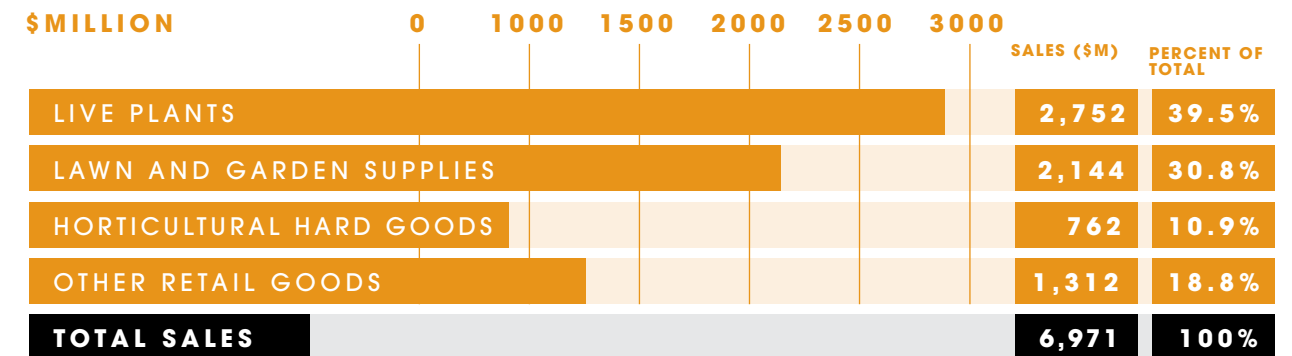
QUICK FACTS

Palms are a major Florida specialty plant product, representing 7% of Florida's total nursery sales. Native plants represent 10.5%

Landscape Services



Garden Center Retailers



Impact on Florida's Employment

Total direct employment of Florida's nursery and landscape industry is nearly 294,000 jobs, while the industry's total employment impact is nearly 319,000 jobs.



Florida Environmental Horticulture Industry Employment

SECTOR	FULL-TIME JOBS	PART-TIME JOBS	TOTAL JOBS
NURSERIES	25,659	8,776	33,435
LANDSCAPE	59,513	28,402	87,914
RETAILERS	105,212	66,617	171,830
TOTAL	190,384	103,795	293,179

Florida's top 15 counties for employment impact, in order, are: Miami-Dade, Palm Beach, Orange, Hillsborough, Broward, Duval, Volusia, Lee, Pinellas, Lake, Polk, Collier, Seminole, Sarasota and Leon.

QUICK FACTS

Total wages paid in 2005 were \$4.48 billion.

77% of nursery jobs, 68% of landscape jobs and 61% of horticulture retail industry jobs are full-time positions.

From 2000 to 2005, total employment impacts increased by 131,000 Florida jobs.

Impact on Florida's Economy

The total output or revenue impact of Florida's nursery and landscape industry for 2005 soared to an estimated \$12.63 billion.



Total Economic Impacts of Nursery & Landscape in Florida

SECTOR	OUTPUT (\$M)	JOBS	VALUE-ADDED (\$M)	LABOR INCOME (\$M)	INDIRECT TAX (\$M)
NURSERIES	4,768	53,551	3,977	1,848	125.4
LANDSCAPE	5,273	88,073	2,718	2,161	93.2
RETAILERS	2,596	176,949	1,952	1,180	330.2
TOTAL	12,637	318,573	8,647	5,189	548.8
% INCREASE FROM 2000 TO 2005	+38%	+70%	+35%	+27%	+19%

Florida's top 15 counties for sales, in order, are: Miami-Dade, Palm Beach, Orange, Hillsborough, Broward, Duval, Volusia, Lee, Pinellas, Lake, Polk, Collier, Seminole, Sarasota and Leon.



Florida's 67 Counties

County Sales and Employment for all sectors: nursery growers, landscape and garden center retailers

COUNTY	TOTAL SALES (\$M)	EMPLOYMENT IMPACT (JOBS)
ALACHUA	282.9	6,509
BAKER	18.9	462
BAY	99.7	2,127
BRADFORD	12.0	291
BREVARD	319.4	7,086
BROWARD	903.3	18,157
CALHOUN	11.1	277
CHARLOTTE	97.9	2,197
CITRUS	57.8	1,219
CLAY	131.4	3,098
COLLIER	426.8	9,030
COLUMBIA	43.5	1,043
DESOTO	66.2	1,507
DIXIE	5.1	125
DUVAL	581.9	11,768
ESCAMBIA	265.1	6,193
FLAGLER	91.5	1,900
FRANKLIN	0.4	6
GADSDEN	184.2	3,304
GILCHRIST	10.2	249
GLADES	5.5	131
GULF	1.2	20
HAMILTON	5.6	133
HARDEE	69.3	1,52
HENDRY	26.1	610
HERNANDO	96.2	2,037
HIGHLANDS	152.6	3,417
HILLSBOROUGH	1,010.4	20,410
HOLMES	10.6	255
INDIAN RIVER	112.1	2,440
JACKSON	32.5	753
JEFFERSON	58.3	1,329

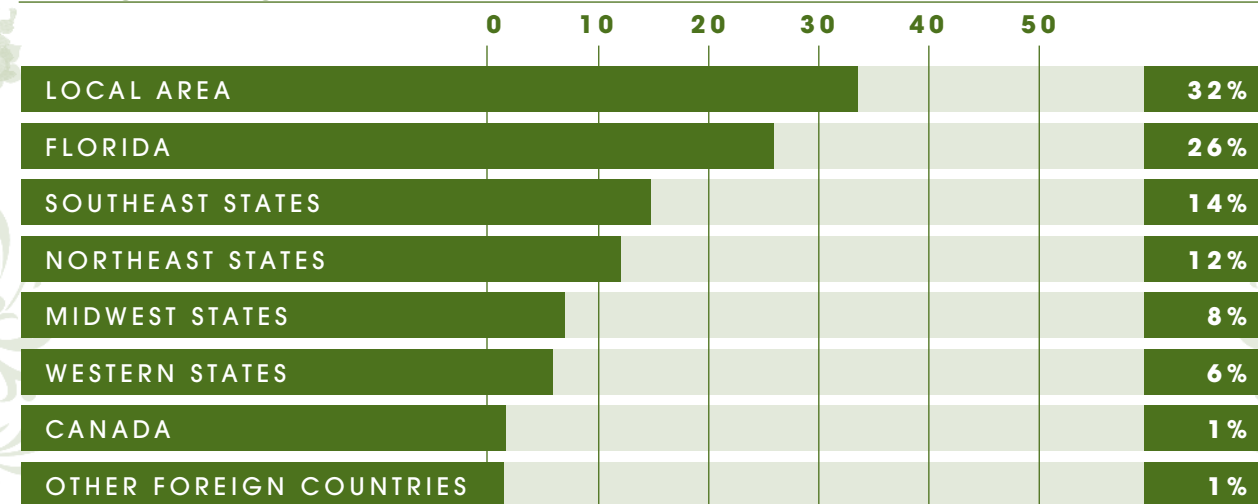
COUNTY	TOTAL SALES (\$M)	EMPLOYMENT IMPACT (JOBS)
LAFAYETTE	68.2	1,725
LAKE	458.1	9,814
LEE	500.9	10,162
LEON	325.4	7,499
LEVY	31.3	698
LIBERTY	0.4	6
MADISON	33.5	787
MANATEE	244.4	4,869
MARION	253.8	5,827
MARTIN	156.0	2,944
MIAMI-DADE	1,981.9	40,837
MONROE	25.4	488
NASSAU	33.2	684
OKALOOSA	121.9	2,649
OKEECHOBEE	36.9	796
ORANGE	1,135.8	21,733
OSCEOLA	171.1	3,519
PALM BEACH	1,183.0	23,776
PASCO	239.7	5,055
PINELLAS	588.9	10,208
POLK	434.6	9,532
PUTNAM	62.5	1,250
ST. JOHNS	226.8	5,317
ST. LUCIE	224.3	5,022
SANTA ROSA	73.2	1,535
SARASOTA	365.3	7,776
SEMINOLE	421.3	9,031
SUMTER	53.2	1,097
SUWANNEE	63.7	1,535
TAYLOR	11.6	272
UNION	6.0	140
VOLUSIA	525.3	10,454
WAKULLA	8.3	178
WALTON	64.0	1,462
WASHINGTON	12.0	280
TOTAL	15.232	318,573

Sales by Market Area

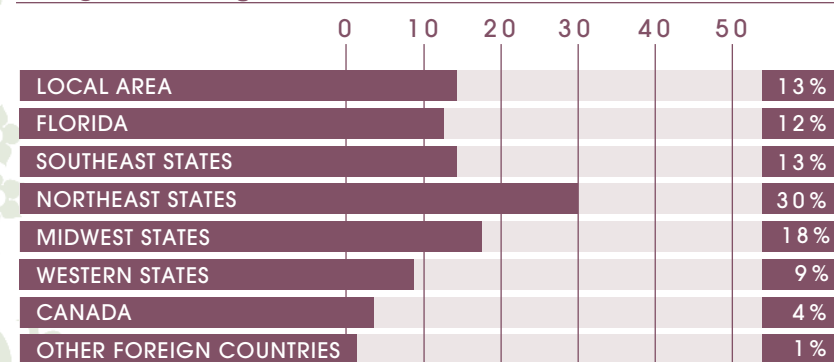
SECTOR	PERCENT OF TOTAL SALES			
	LOCAL AREA	FLORIDA	NATIONAL	INTERNATIONAL
NURSERY GROWERS	32	26	40	2
LANDSCAPE SERVICES	86	13	<1	<1
GARDEN CENTER RETAILERS	72	14	11	2

Local area is the city or county in which the business is located or within a 50-mile radius.

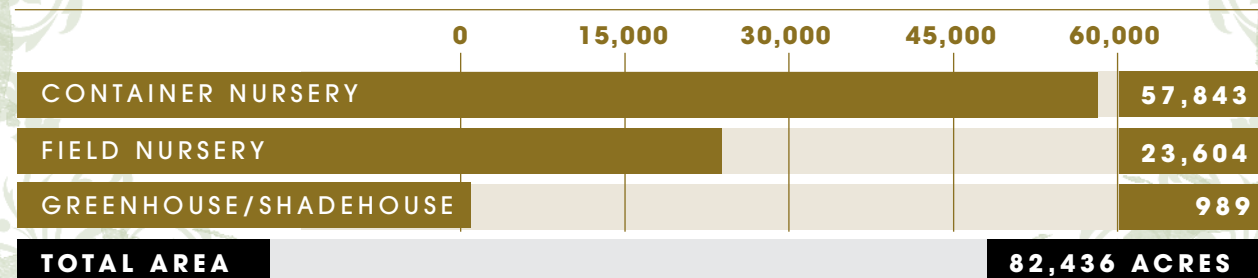
Nursery Sales by Market Area



Foliage Sales by Market Area



Total Acres for Florida Grower Production



989 acres of Florida greenhouse and shadehouse represents 43 million square feet of production.



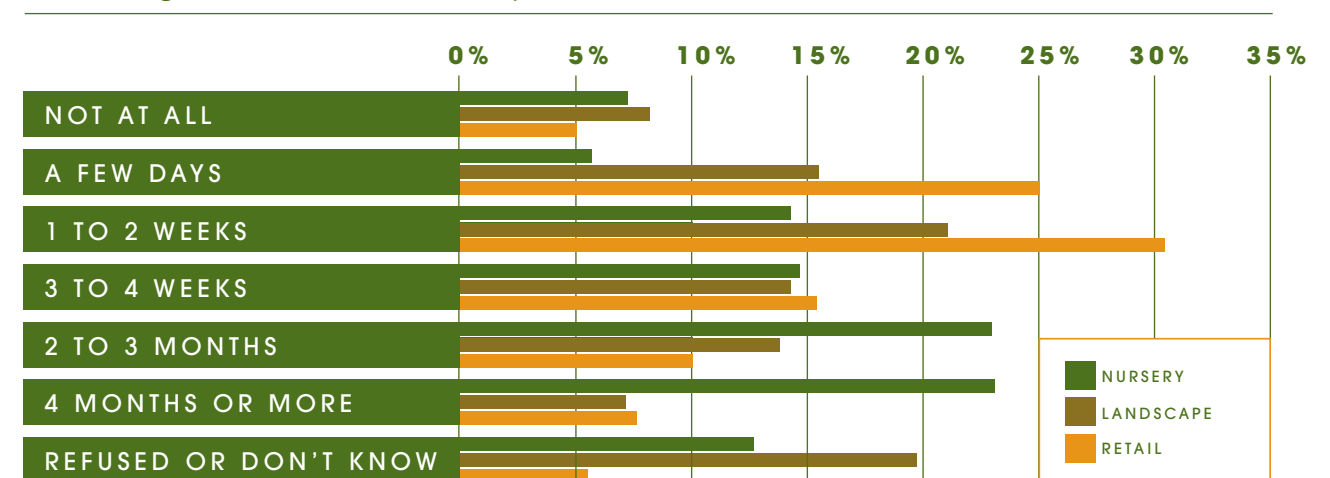
Overall, Florida's nursery and landscape industry incurred \$2.1 billion in losses to the 2004 & 2005 hurricanes.

2004 & 2005 brought an unprecedented eight major hurricanes to Florida. These storms inflicted damage to infrastructure, caused large crop losses and halted business activity throughout Florida.

Estimated Hurricane Losses for 2004 & 2005

TYPE LOSS	NURSERY (\$M)	LANDSCAPE (\$M)	RETAIL (\$M)	TOTAL (\$M)
CROP LOSSES	660	273	118	1,051
STRUCTURE DAMAGE	183	61	221	465
CLEAN-UP COSTS	122	341	143	606
TOTAL	965	675	482	2,122

Total Length of Business Interruption for 2004 & 2005 Hurricanes



Nursery Business Interruption

60% OF NURSERIES SUFFERED INTERRUPTION FOR 3 OR MORE WEEKS.

46% OF NURSERIES SUFFERED INTERRUPTION FOR 2 MONTHS OR MORE.

23% OF NURSERIES SUFFERED INTERRUPTION FOR 4 MONTHS OR MORE.

Fngla's mission...

The mission of the Florida Nursery, Growers and Landscape Association is to enhance its members' business success through political leadership, education, marketing, research, certification and services.



Fngla's vision...

FNGLA is the leader of Florida's environmental horticulture industry and the trusted resource for leadership, knowledge, and business services.



Fngla's value...

The following core principles guide the governance and management of FNGLA:

- Organizational Excellence
- Member-Focus
- Collaboration and Partnerships
- Leadership in Agriculture
- Continuous Improvement

**FOR A COMPLETE VERSION OF THIS ECONOMIC
REPORT, ACCESS THE FOLLOWING:**

[HTTP://ECONOMICIMPACT.IFAS.UFL.EDU](http://ECONOMICIMPACT.IFAS.UFL.EDU)

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