Economic Survey of the Environmental Horticulture Industry in Florida in 2015[1]

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Executive Summary

The environmental horticulture industry is comprised of nursery and greenhouse producers, landscape service firms, horticultural product retailers and wholesalers, and allied horticultural product manufacturers and service providers. The characteristics and economic contributions of the environmental horticulture industry in Florida in 2015 were evaluated through mail and internet surveys of industry firms conducted in 2016.

Survey questionnaires were sent to 10,440 firms, and usable responses were provided by 1,546 firms representing a 14.8 percent response rate. Survey respondents reported sales of $1.195 billion in 2015. Data from the surveys were extrapolated to estimate total industry sales of $10.711 billion, including $2.753 billion for nursery producers, $4.431 billion for landscape service firms, $1.239 billion for horticultural retailers, $1.041 billion for wholesalers, and $1.247 billion for allied firms. Approximately 25 to 30 percent of nursery, wholesaler, and allied firm sales were to out-of-state (national and international) markets, while landscape and retailer sales were predominantly to state and local markets. Respondents reported employment of 14,794 persons, including 11,245 full-time and 3,549 part-time or temporary employees, and total employment in the industry was estimated at 109,821 jobs, including 64,777 jobs in the landscape sector and 19,152 jobs for nurseries. In addition, a total of 552 unfilled positions were reported. Respondents reported capital investment of nearly $50 million in 2015, including $21 million for buildings/structures, $23 million for equipment and vehicles, and smaller amounts for information technology and other types of capital. For the next three years (2016–18), respondents expected to invest nearly $90 million.

Sales percentages were reported for major types of products, services, and customers. The largest plant product types for the nursery plant grower sector were palms and tropical foliage plants, representing 21.5 percent of reported sales, followed by evergreen trees and shrubs (15.9%), propagating material (12.8%), and potted flowering/bedding plants (12.6%). Florida native plants represented 15.5 percent of nursery sales. For the landscape services sector, 32.3 percent of sales were for landscape installations and 31.2 percent were for landscape maintenance, including lawncare. For horticultural retailers and wholesalers, about one-third (34.6%) of sales were for live plants, followed by nursery containers (15.9%) and soil/growing media (13.1%). Among allied suppliers, the largest specific categories of product sales were fertilizer (54.0%) and irrigation equipment (13.7%). Information was collected on various product or service features offered in the industry, such as "Florida Friendly" plant or landscaping. Among possible business threats to the industry, over one-half

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of respondents indicated that water-use restrictions, low prices, increasing costs of production, and government regulations were either “very important” or “moderately important”.

For complete information about the study methods and results, see the full report by Hodges et al. (2016) available at http://fred.ifas.ufl.edu/pdf/EconContEnvirHortIndFL2015-11-15-16.pdf or http://fred.ifas.ufl.edu/economicimpactanalysis/publications/2015-environmental-horticulture-industries/