

*The Environmental Horticulture Industry
in New England*

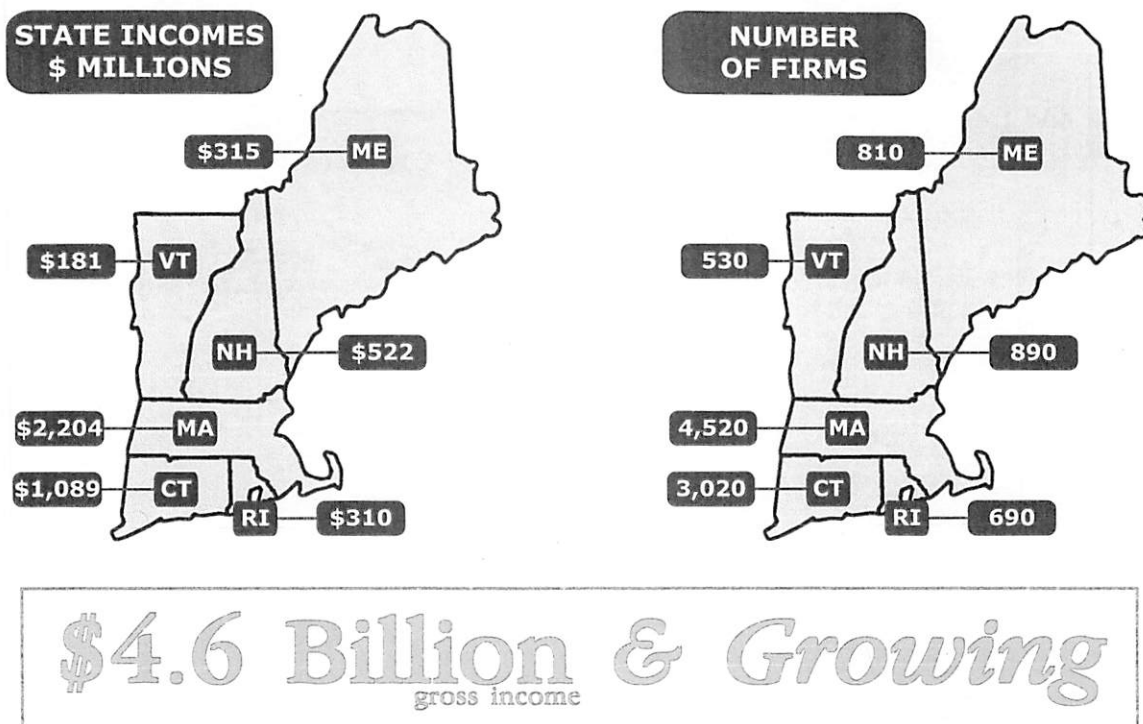
\$4.6 Billion & Growing



*Sponsored by: New England Nursery Association, Inc.
Conducted by: University of Vermont
University of Maine*

*A summary of the impact of the
Environmental Horticulture Industry
on the New England economy
January, 2006*

New England



Environmental Horticulture in New England



is many types of businesses...

There are **more than 10,500 firms** in the region. These include wholesale and retail nurseries and greenhouses, retail garden centers and florists, and landscape and tree services.



is growing...

Income increased an average **27 percent per firm**, for six out of every ten firms. Over a three year period, **industry income grew** an estimated 15 percent. Over the last six years, industry income grew an average of four percent per year.



provides many jobs...

An estimated **148,000 people are employed** in this industry. **An additional 30,000 employees are needed.** An estimated **72,000 jobs are full time.** In firms with ten or more employees, almost half the positions are full time and almost two-thirds are either full or part time. This industry paid an estimated **\$2.2 billion to employees** in 2004. Over a three year period from 2001 to 2004, an average **28 percent more was spent on labor.**



supports the economy...

Businesses in this industry paid almost **\$418 million in taxes** in 2004. Taxes increased for over half the firms. The average increase per firm was 25 percent.



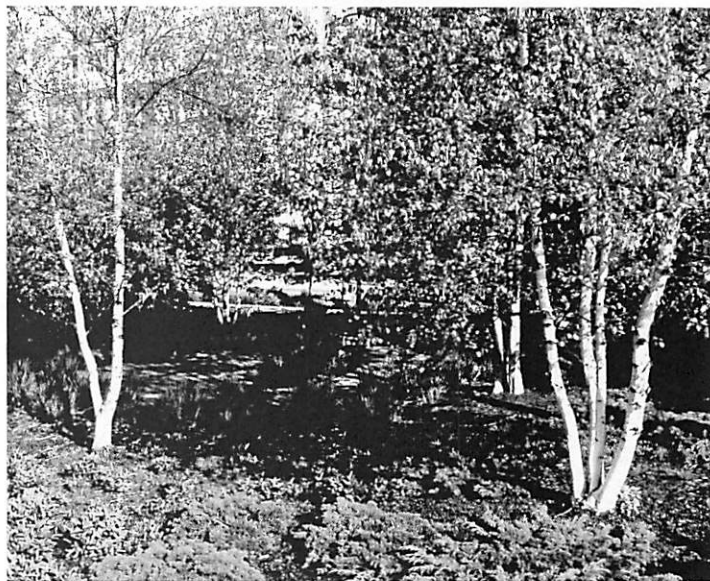
protects agricultural land and green space.

This industry is keeping more than **194,000 acres** in agriculture, of which half is open space and a third is in a land preservation program.

Environmental Horticulture is the fastest growing sector of American agriculture today, according to the U.S. Department of Agriculture, and New England's overall contribution to this growth is significant. The value added to our local economy through New England's wholesale nursery and greenhouse growers, retail garden centers and florists, landscape and tree care services in 2004 surpassed \$4.6 billion. Additionally, the Environmental Horticulture Industry substantially impacts the region through active stewardship of the environment.

This study surveyed New England's Environmental Horticulture Industry—comprising more than 10,500 businesses that earn at least half their income from green industry activities. The results clearly quantify the many positive ways this industry affects the regional economy including volume of business, cost of doing business, employment opportunities, tax contributions and future growth potential.

The industry is made up of multi-generation, family businesses whose hard work in challenging conditions has put New England on the map as producing the country's hardiest plants. Their success, coupled with that of expert growers, cutting-edge garden centers, innovative landscape contractors and designers, progressive tree care professionals and other visionary members of the regional green industry, promises a continuing *bright future for Environmental Horticulture in New England.*



Environmental Horticulture

We grow, sell, install, maintain and preserve the living landscape.

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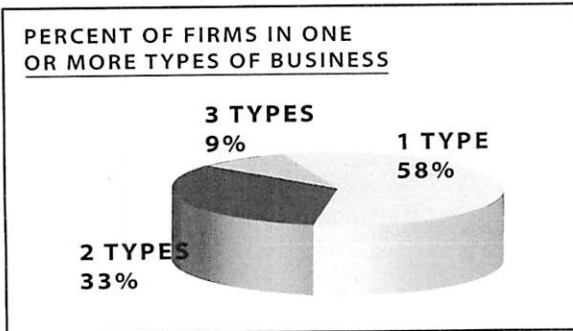
- 3 Connecticut More than 3,000 firms are in the industry.
- 5 Maine Two-thirds of firms sell retail goods.
- 7 Massachusetts Firms provide an estimated 29,000 full-time jobs.
- 9 New Hampshire Two-thirds of plant sales income came from plants grown by the seller.
- 11 Rhode Island Plant sales make up 75 percent of total state industry income.
- 13 Vermont Two-thirds of firms increased their income an average 38 percent over three years.
- Back Cover Resources Contacts for more information.

For more details on this survey, please visit our web site:
<http://pss.uvm.edu/ppp/nesurvey/index.htm>



Connecticut... \$1.1B

Environmental Horticulture is a major sector of agriculture in Connecticut. There are **more than 3,020** firms in this industry.



These firms are involved in:

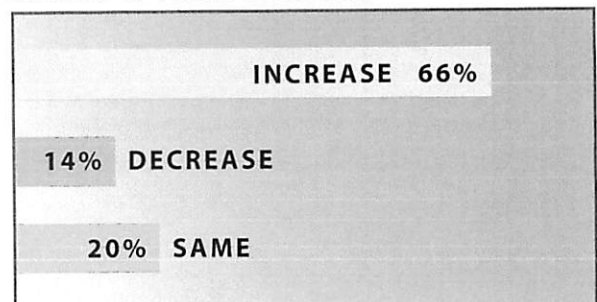
- ⊙ **production:** nurseries, greenhouses, herbs, cut flowers, turfgrass.
- ⊙ **retail:** garden centers, florists.
- ⊙ **landscape services:** landscape design, installation, maintenance, lawn care, tree care.

Many firms are involved in more than one of these types of business.

The **Environmental Horticulture** industry **produces income**. The estimated value in Connecticut for 2004 is **\$1.1 billion** gross income.

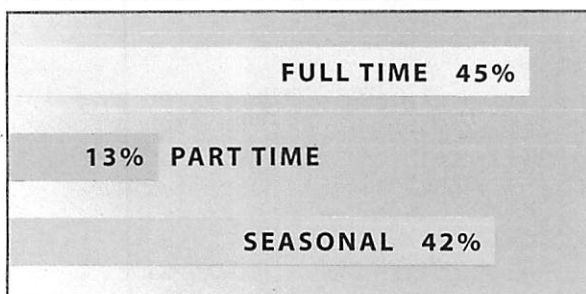
- ⊙ Overall industry income has grown since the last survey in 2001.
- ⊙ Over a three year period, between 2001 and 2004, more than **1,990 firms increased their income**. The average increase per firm was 26 percent.
- ⊙ Many additional firms, not counted in this survey, derive at least partial income from this industry. These include seasonal outlets such as roadside markets, hardware stores, mass market stores and property maintenance firms.

INCOME OF FIRMS SURVEYED



Environmental Horticulture provides **MANY jobs**. At least **48,000** people are employed in this industry. An additional 7,600 are needed.

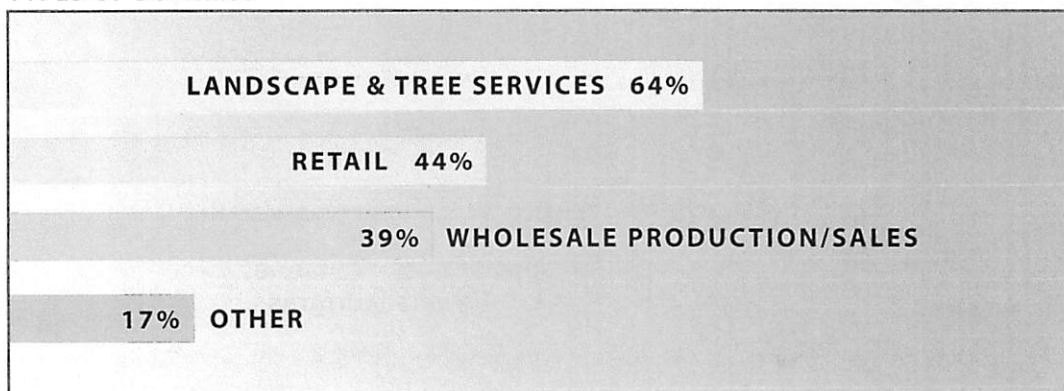
PEOPLE EMPLOYED BY BUSINESSES



- ⊙ An estimated **22,000 jobs are full time**.
- ⊙ This industry paid an estimated **\$632 million to employees** in 2004.
- ⊙ More than half the businesses reported an increase in the cost of labor. The average increase per firm was 26 percent.

Environmental Horticulture is diverse.

TYPES OF BUSINESS



Almost two-thirds of firms provide, and derive income from, landscape and tree services.

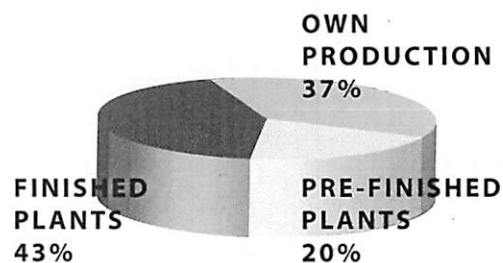
Plant production and sales are a significant part of the **Environmental Horticulture** industry. Plant sales generate an estimated **\$656 million**.

This includes:

- ⊙ \$243 million from plants produced totally by the seller.
- ⊙ \$131 million from young plants grown further ("pre-finished") prior to selling.
- ⊙ \$282 million from "finished" plants bought for resale, either wholesale or retail.

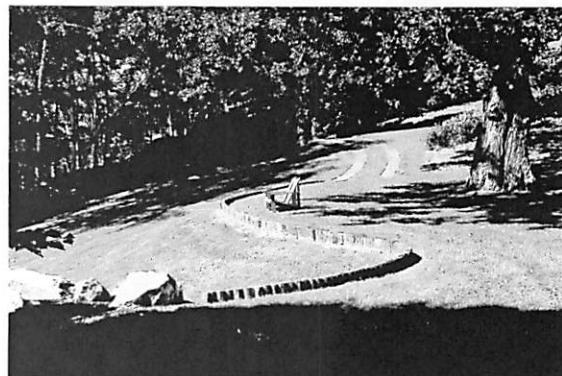
Plant production generates **\$374 million**. A majority of firms (79 percent) sold plants.

INCOME FROM PLANT SALES



More Facts on Environmental Horticulture in Connecticut

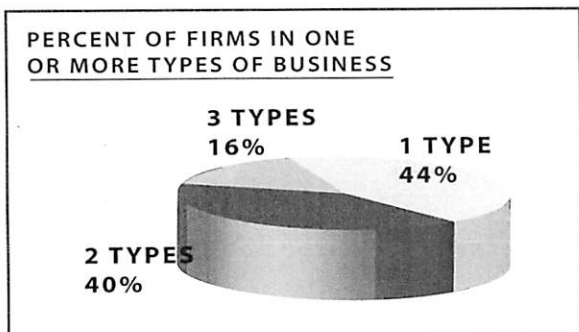
- ⊙ This industry is keeping more than 42,000 acres in agriculture, of which 56 percent is open space and 30 percent is in a land preservation program.
- ⊙ Over two-thirds of income (67 percent) comes from in-state sales and services.
- ⊙ Businesses in this industry paid almost \$154 million in taxes in 2004. Taxes increased for nearly half the firms. The average increase per firm was 25 percent.





Maine...\$315M

Environmental Horticulture is a major sector of agriculture in Maine. There are **more than 810** firms in this industry.



These firms are involved in:

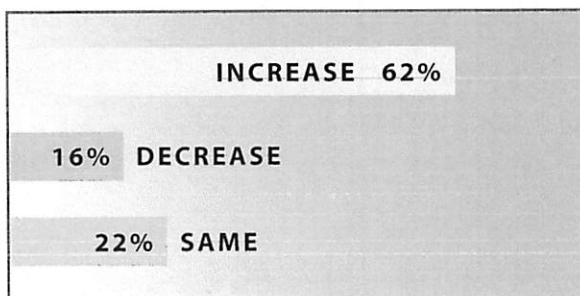
- © **production:** nurseries, greenhouses, herbs, cut flowers, turfgrass.
- © **retail:** garden centers, florists.
- © **landscape services:** landscape design, installation, maintenance, lawn care, tree care.

Many firms are involved in more than one of these types of business.

The **Environmental Horticulture** industry **produces income**. The estimated value in Maine for 2004 is **\$315 million** gross income.

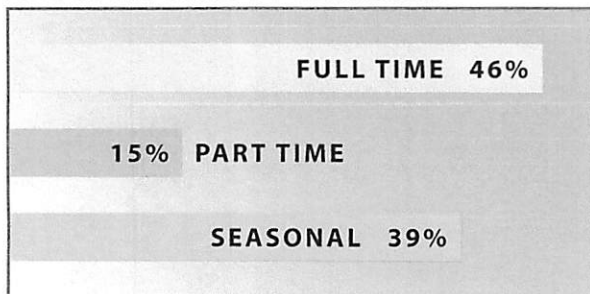
- © Overall industry income has grown since the last survey in 2001.
- © Over a three year period, between 2001 and 2004, more than **500 firms increased their income**. The average increase per firm was 23 percent.
- © Many additional firms, not counted in this survey, derive at least partial income from this industry. These include seasonal outlets such as roadside markets, hardware stores, mass market stores and property maintenance firms.

INCOME OF FIRMS SURVEYED



Environmental Horticulture provides **MANY jobs**. At least **10,800** people are employed in this industry. An additional 1,600 are needed.

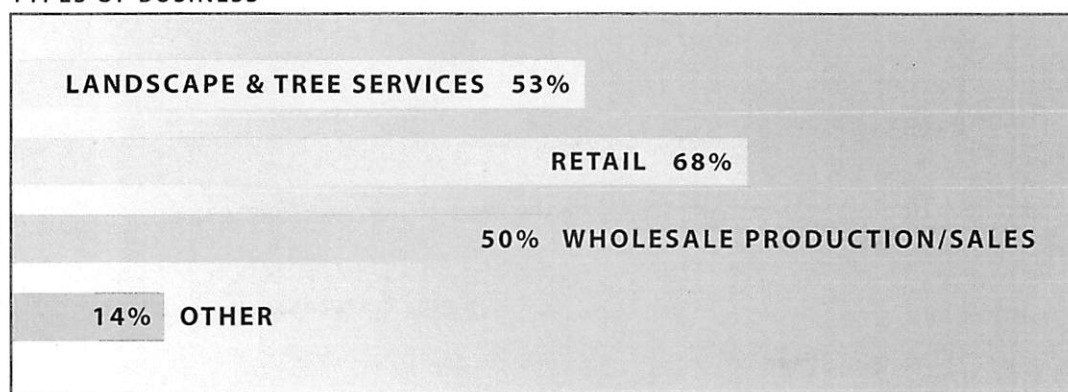
PEOPLE EMPLOYED BY BUSINESSES



- © An estimated **5,000 jobs are full time**.
- © This industry paid an estimated **\$127 million to employees** in 2004.
- © More than half the businesses reported an increase in the cost of labor. The average increase per firm was 20 percent.

Environmental Horticulture is diverse.

TYPES OF BUSINESS



Over half of firms provide, and derive income from, landscape and tree services.

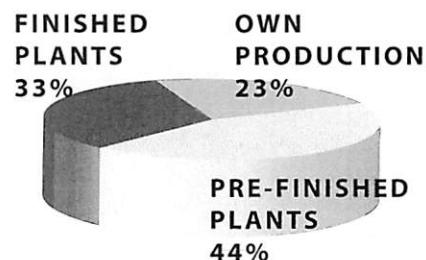
Plant production and sales are a significant part of the **Environmental Horticulture** industry. Plant sales generate an estimated **\$114 million**.

This includes:

- ⊙ \$26 million from plants produced totally by the seller.
- ⊙ \$50 million from young plants grown further ("pre-finished") prior to selling.
- ⊙ \$38 million from "finished" plants bought for resale, either wholesale or retail.

Plant production generates **\$76 million**. A majority of firms (85 percent) sold plants.

INCOME FROM PLANT SALES



More Facts on Environmental Horticulture in Maine

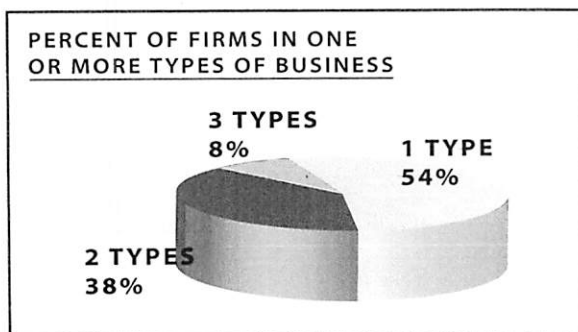
- ⊙ This industry is keeping more than 14,000 acres in agriculture, of which 44 percent is open space and 17 percent is in a land preservation program.
- ⊙ The majority of income (74 percent) comes from in-state sales and services.
- ⊙ Businesses in this industry paid almost \$22 million in taxes in 2004. Taxes increased for nearly half the firms. The average increase per firm was 23 percent.





Massachusetts... \$2.2B

Environmental Horticulture is a major sector of agriculture in Massachusetts. There are **more than 4,520** firms in this industry.



These firms are involved in:

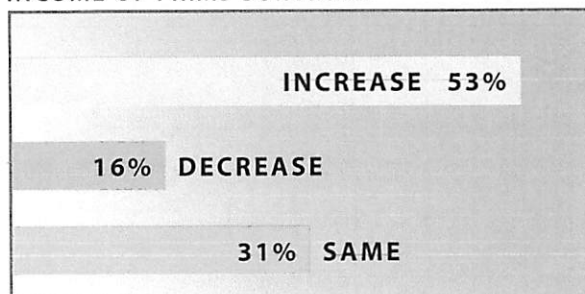
- ⊙ **production:** nurseries, greenhouses, herbs, cut flowers, turfgrass.
- ⊙ **retail:** garden centers, florists.
- ⊙ **landscape services:** landscape design, installation, maintenance, lawn care, tree care.

Many firms are involved in more than one of these types of business.

The **Environmental Horticulture** industry **produces income**. The estimated value in Massachusetts for 2004 is **\$2.2 billion** gross income.

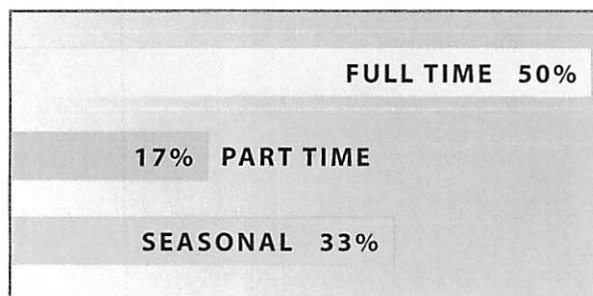
- ⊙ Overall industry income has grown since the last survey in 2001.
- ⊙ Over a three year period, between 2001 and 2004, more than **2,400 firms increased their income**. The average increase per firm was 24 percent.
- ⊙ Many additional firms, not counted in this survey, derive at least partial income from this industry. These include seasonal outlets such as roadside markets, hardware stores, mass market stores and property maintenance firms.

INCOME OF FIRMS SURVEYED



Environmental Horticulture provides **MANY jobs**. At least **58,800** people are employed in this industry. An additional 13,100 are needed.

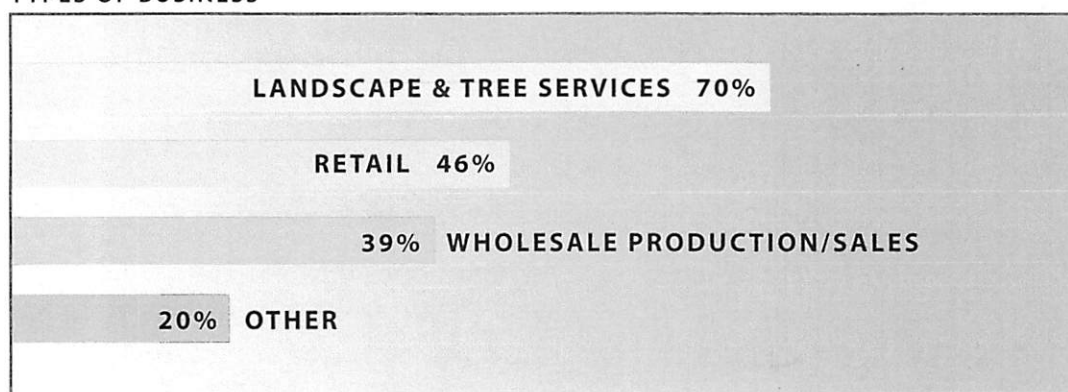
PEOPLE EMPLOYED BY BUSINESSES



- ⊙ An estimated **29,000 jobs are full time**.
- ⊙ This industry paid an estimated **\$980 million to employees** in 2004.
- ⊙ More than half the businesses reported an increase in the cost of labor. The average increase per firm was 26 percent.

Environmental Horticulture is diverse.

TYPES OF BUSINESS



Over two-thirds of firms provide, and derive income from, landscape and tree services.

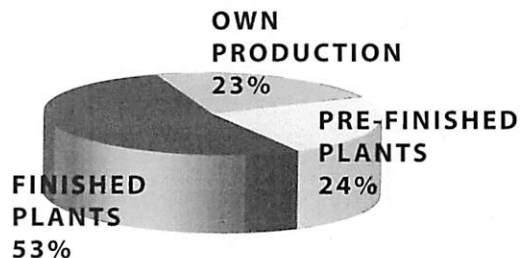
Plant production and sales are a significant part of the **Environmental Horticulture** industry. Plant sales generate an estimated **\$947 million**.

This includes:

- © \$218 million from plants produced totally by the seller.
- © \$227 million from young plants grown further ("pre-finished") prior to selling.
- © \$502 million from "finished" plants bought for resale, either wholesale or retail.

Plant production generates **\$445 million**. A majority of firms (88 percent) sold plants.

INCOME FROM PLANT SALES



More Facts on Environmental Horticulture in Massachusetts

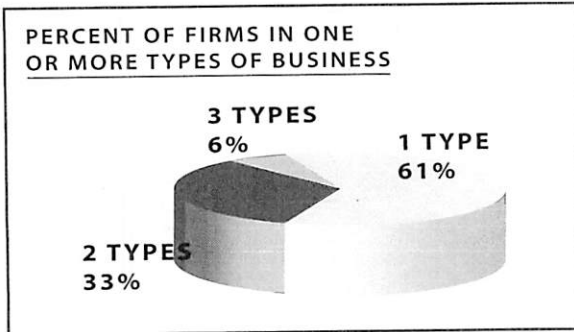
- © This industry is keeping more than 79,000 acres in agriculture, of which 58 percent is open space and 29 percent is in a land preservation program.
- © The majority of income (85 percent) comes from in-state sales and services.
- © Businesses in this industry paid almost \$190 million in taxes in 2004. Taxes increased for nearly half the firms. The average increase per firm was 23 percent.





New Hampshire...\$522M

Environmental Horticulture is a major sector of agriculture in New Hampshire. There are **more than 890** firms in this industry.



These firms are involved in:

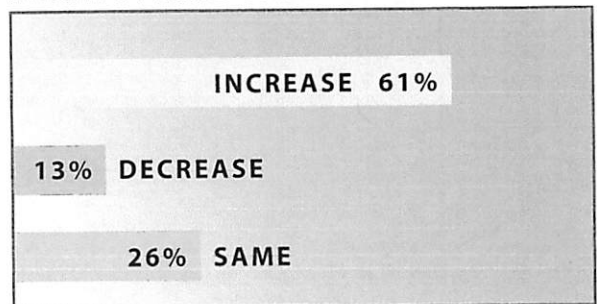
- ⊙ **production:** nurseries, greenhouses, herbs, cut flowers, turfgrass.
- ⊙ **retail:** garden centers, florists.
- ⊙ **landscape services:** landscape design, installation, maintenance, lawn care, tree care.

Many firms are involved in more than one of these types of business.

The **Environmental Horticulture** industry **produces income**. The estimated value in New Hampshire for 2004 is **\$522 million** gross income.

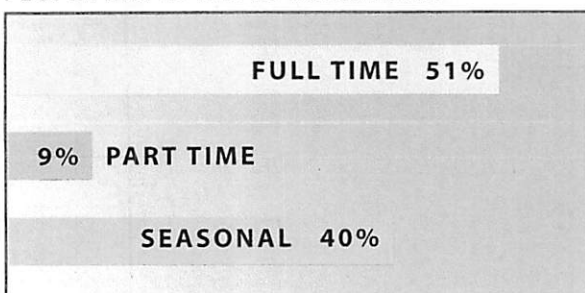
- ⊙ Overall industry income has grown since the last survey in 2001.
- ⊙ Over a three year period, between 2001 and 2004, more than **540 firms increased their income**. The average increase per firm was 31 percent.
- ⊙ Many additional firms, not counted in this survey, derive at least partial income from this industry. These include seasonal outlets such as roadside markets, hardware stores, mass market stores and property maintenance firms.

INCOME OF FIRMS SURVEYED



Environmental Horticulture provides **MANY jobs**. At least **13,500** people are employed in this industry. An additional 2,600 are needed.

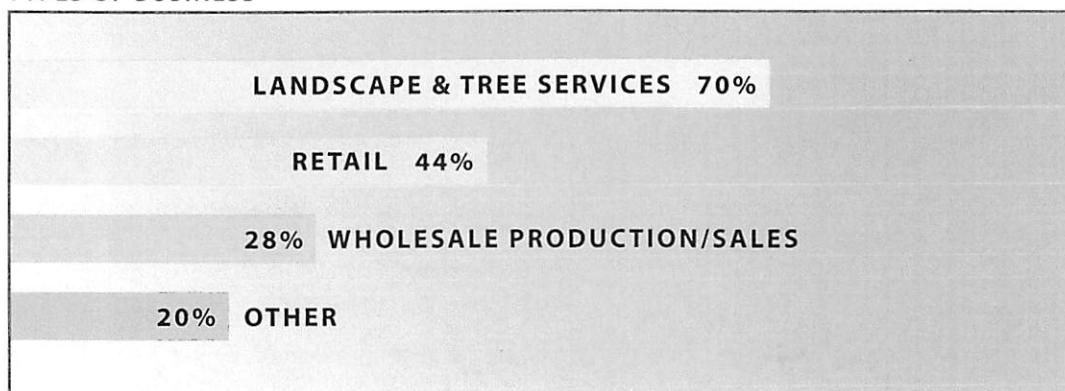
PEOPLE EMPLOYED BY BUSINESSES



- ⊙ An estimated **6,800 jobs are full time**.
- ⊙ This industry paid an estimated **\$217 million to employees** in 2004.
- ⊙ More than half the businesses reported an increase in the cost of labor. The average increase per firm was 29 percent.

Environmental Horticulture is diverse.

TYPES OF BUSINESS



Over two-thirds of firms provide, and derive income from, landscape and tree services.

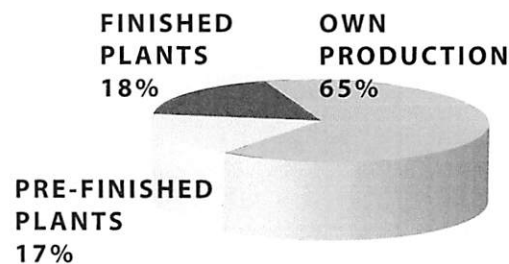
Plant production and sales are a significant part of the **Environmental Horticulture** industry. Plant sales generate an estimated **\$225 million**.

This includes:

- © \$146 million from plants produced totally by the seller.
- © \$38 million from young plants grown further ("pre-finished") prior to selling.
- © \$41 million from "finished" plants bought for resale, either wholesale or retail.

Plant production generates **\$184 million**. A majority of firms (79 percent) sold plants.

INCOME FROM PLANT SALES



More Facts on Environmental Horticulture in New Hampshire

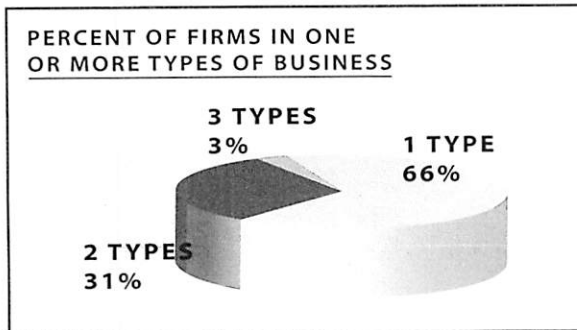
- © This industry is keeping more than 20,000 acres in agriculture, of which 32 percent is open space and 31 percent is in a land preservation program.
- © The majority of income (73 percent) comes from in-state sales and services.
- © Businesses in this industry paid almost \$19 million in taxes in 2004. Taxes increased for nearly half the firms. The average increase per firm was 33 percent.





Rhode Island...\$310M

Environmental Horticulture is a major sector of agriculture in Rhode Island. There are **more than 690** firms in this industry.



These firms are involved in:

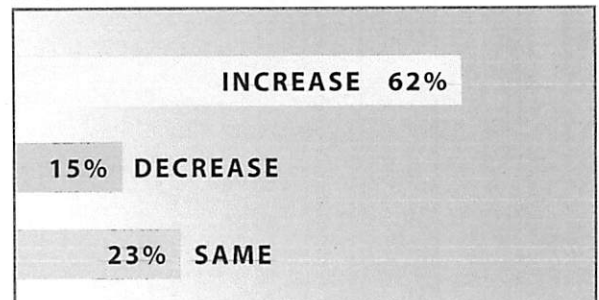
- ⊙ **production:** nurseries, greenhouses, herbs, cut flowers, turfgrass.
- ⊙ **retail:** garden centers, florists.
- ⊙ **landscape services:** landscape design, installation, maintenance, lawn care, tree care.

Many firms are involved in more than one of these types of business.

The **Environmental Horticulture** industry **produces income**. The estimated value in Rhode Island for 2004 is **\$310 million** gross income.

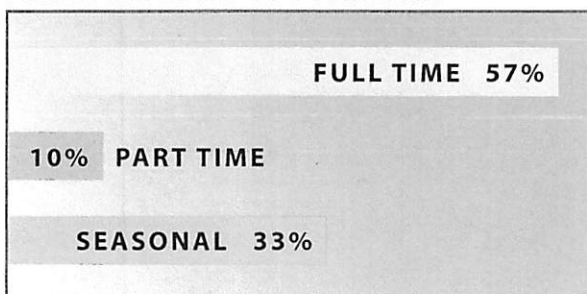
- ⊙ A majority of firms increased their income since the last survey in 2001.
- ⊙ Over a three year period, between 2001 and 2004, more than **430 firms increased their income**. The average increase per firm was 25 percent.
- ⊙ Many additional firms, not counted in this survey, derive at least partial income from this industry. These include seasonal outlets such as roadside markets, hardware stores, mass market stores and property maintenance firms.

INCOME OF FIRMS SURVEYED



Environmental Horticulture provides **MANY jobs**. At least **10,000** people are employed in this industry. An additional 3,800 are needed.

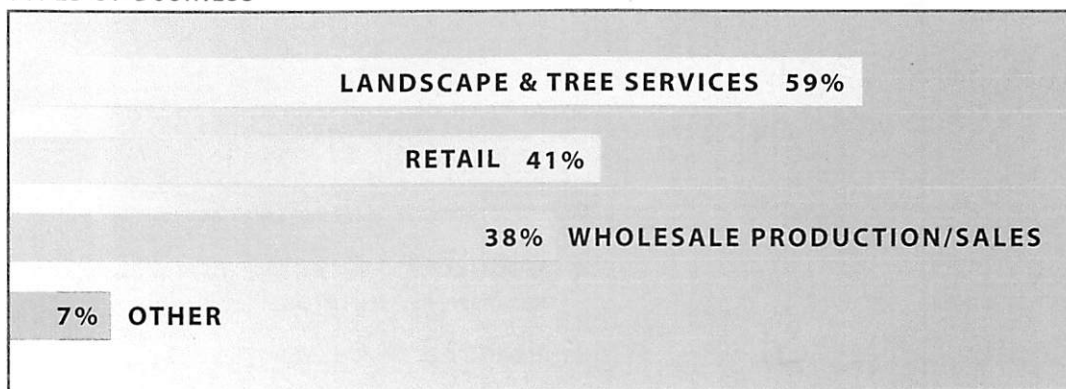
PEOPLE EMPLOYED BY BUSINESSES



- ⊙ An estimated **5,700 jobs are full time**.
- ⊙ This industry paid an estimated **\$150 million to employees** in 2004.
- ⊙ More than half the businesses reported an increase in the cost of labor. The average increase per firm was 25 percent.

Environmental Horticulture is diverse.

TYPES OF BUSINESS



Over half of firms provide, and derive income from, landscape and tree services.

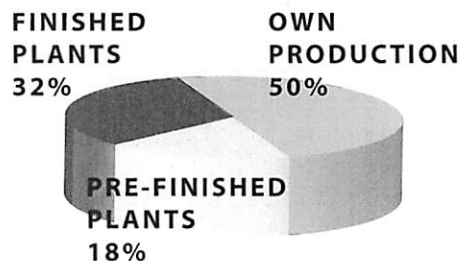
Plant production and sales are a significant part of the **Environmental Horticulture** industry. Plant sales generate an estimated **\$237 million**.

This includes:

- ⊙ \$118 million from plants produced totally by the seller.
- ⊙ \$43 million from young plants grown further ("pre-finished") prior to selling.
- ⊙ \$76 million from "finished" plants bought for resale, either wholesale or retail.

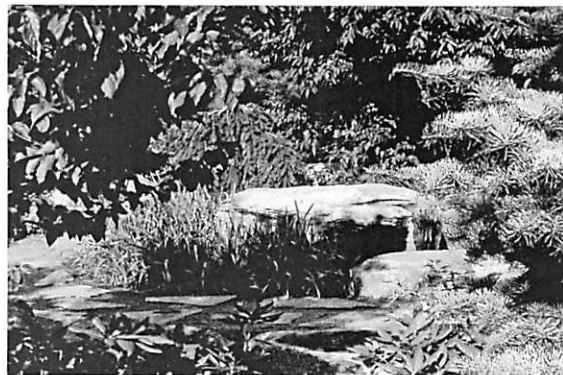
Plant production generates **\$161 million**. A majority of firms (79 percent) sold plants.

INCOME FROM PLANT SALES



More Facts on Environmental Horticulture in Rhode Island

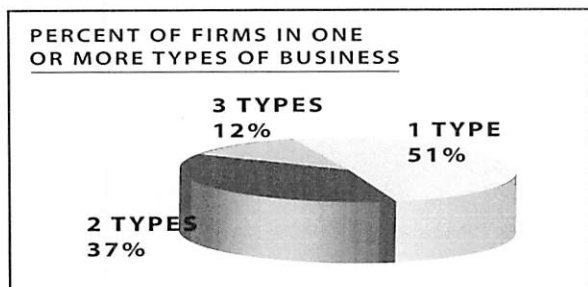
- ⊙ This industry is keeping more than 27,000 acres in agriculture, of which 80 percent is open space and 48 percent is in a land preservation program.
- ⊙ Over half the income (54 percent) comes from in-state sales and services.
- ⊙ Businesses in this industry paid almost \$23 million in taxes in 2004. Taxes increased for nearly half the firms. The average increase per firm was 21 percent.





Vermont... \$181M

Environmental Horticulture is a major sector of agriculture in Vermont. There are **more than 530** firms in this industry.



These firms are involved in:

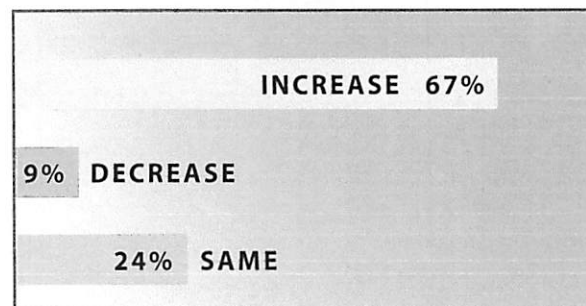
- ⊙ **production:** nurseries, greenhouses, herbs, cut flowers, turfgrass.
- ⊙ **retail:** garden centers, florists.
- ⊙ **landscape services:** landscape design, installation, maintenance, lawn care, tree care.

Many firms are involved in more than one of these types of business.

The **Environmental Horticulture** industry **produces income**. The estimated value in Vermont for 2004 is **\$181 million** gross income.

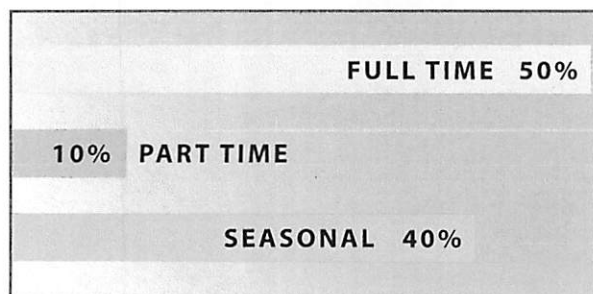
- ⊙ A majority of firms increased their income since the last survey in 2001.
- ⊙ Over a three year period, between 2001 and 2004, more than **350 firms increased their income**. The average increase per firm was 38 percent.
- ⊙ Many additional firms, not counted in this survey, derive at least partial income from this industry. These include seasonal outlets such as roadside markets, hardware stores, mass market stores and property maintenance firms.

INCOME OF FIRMS SURVEYED



Environmental Horticulture provides **MANY jobs**. At least **6,100** people are employed in this industry. An additional 1,200 are needed.

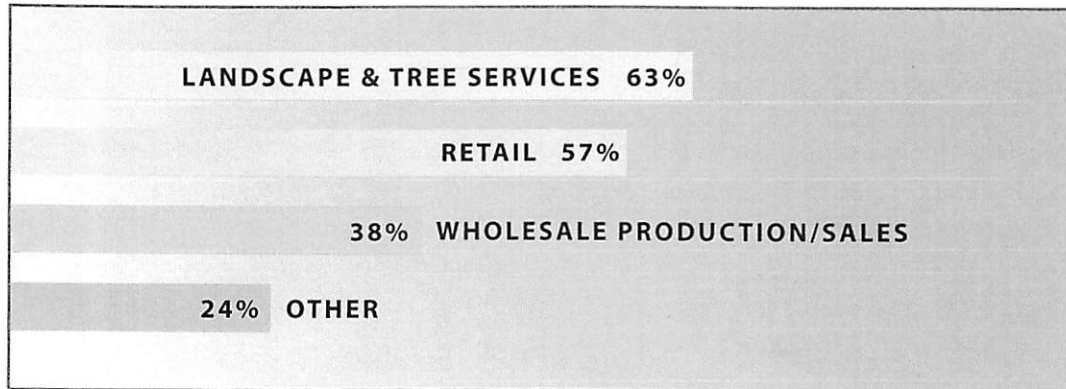
PEOPLE EMPLOYED BY BUSINESSES



- ⊙ An estimated **3,000 jobs are full time**.
- ⊙ This industry paid an estimated **\$75 million to employees** in 2004.
- ⊙ More than half the businesses reported an increase in the cost of labor. The average increase per firm was 45 percent.

Environmental Horticulture is diverse.

TYPES OF BUSINESS



Almost two-thirds of firms provide, and derive income from, landscape and tree services.

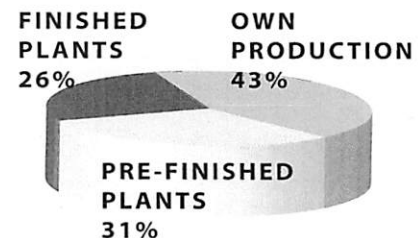
Plant production and sales are a significant part of the **Environmental Horticulture** industry. Plant sales generate an estimated **\$73 million**.

This includes:

- ⊙ \$31 million from plants produced totally by the seller.
- ⊙ \$23 million from young plants grown further ("pre-finished") prior to selling.
- ⊙ \$19 million from "finished" plants bought for resale, either wholesale or retail.

Plant production generates **\$54 million**. A majority of firms (78 percent) sold plants.

INCOME FROM PLANT SALES



More Facts on Environmental Horticulture in Vermont

- ⊙ This industry is keeping more than 11,200 acres in agriculture, of which 33 percent is open space and 58 percent is in a land preservation program.
- ⊙ Almost two-thirds of income (63 percent) comes from in-state sales and services.
- ⊙ Businesses in this industry paid almost \$10 million in taxes in 2004. Taxes increased for nearly half the firms. The average increase per firm was 32 percent.



*A summary of the Environmental Horticulture Industry's
impact on the New England economy / January, 2006*

\$4.6 Billion & Growing

The New England Nursery Association recognizes Dr. Leonard Perry, University of Vermont, and Dr. Lois Berg Stack, University of Maine, for their tireless efforts in conducting this survey. Special thanks are extended to the leaders of the New England state nursery and landscape associations for their vision and financial support. We are grateful for an additional grant received from the New England Grows education fund. And, finally, many thanks to the thousands of industry professionals who participated in this study.

Connecticut Nursery & Landscape Association

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Botsford, CT 06404
(203) 445-0110
www.FlowersPlantsinCT.com

Maine Landscape & Nursery Association

(with support from the **Ornamental Horticulture Council**)
500 North Parish Road
Turner, ME 04282
(207) 225-3767
www.melna.org

Massachusetts Nursery & Landscape Association

PO Box 387
Conway, MA 01341
(413) 369-4731
www.mnla.com

New England Nursery Association

8-D Pleasant Street
South Natick, MA 01760
(508) 653-3112
www.NEnsAssn.org

New England Grows, Inc.

8-D Pleasant Street
South Natick, MA 01760
(508) 653-3009
www.NEGrows.org

New Hampshire Plant Growers Association

25 River Bend Road
Newmarket, NH 03857
(603) 292-5238
www.nhplantgrowers.org

Rhode Island Nursery & Landscape Association

64 Bittersweet Drive
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www.rinla.com

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Vermont Association of Professional Horticulturists

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