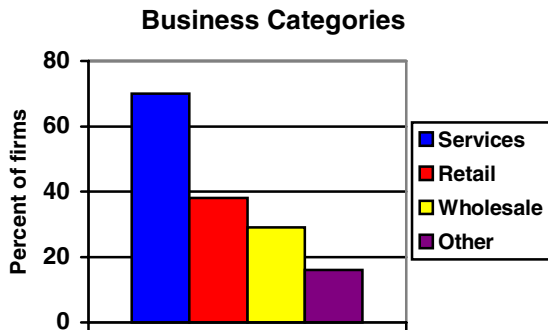


# Massachusetts

# \$1.7 billion and Growing

## Environmental Horticulture is *Many Types* of Businesses

A majority of firms provide landscape services.



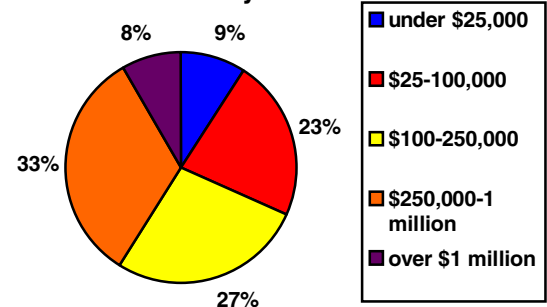
More firms derived income from providing landscape services (70%) than from other business categories. Less than half sold retail green goods (38%). These include plant items such as plants, sod, seeds, cut flowers and floral arrangements. Some firms (24%) also sold hard goods, or non-plant items such as tools, mulch, fertilizers, and vases. Of those wholesale firms (29%), most sold annuals, perennials, groundcovers and herbs (19%); potted flowers or foliage (17%); trees and shrubs (12%); or turfgrass (4%). Of those service firms, most derived income from landscape construction/ installation (53%) or landscape maintenance/ lawn care (43%). Other service firms were involved with tree care (20%), landscape design/ architecture (24%), delivery (10%), or other activities (16%).

## Environmental Horticulture... a Major Sector of Agriculture

The total income for the Massachusetts Industry in 1998 was at least \$1,678,000,000!

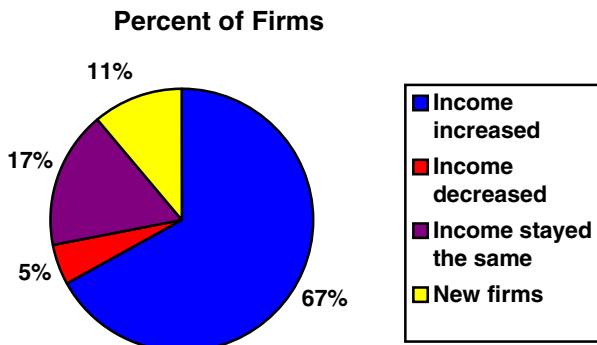
There are approximately 3,655 firms in the Massachusetts Environmental Horticulture Industry. These include nurseries, greenhouses, garden centers, landscapers (design, installation, maintenance), arborists (tree care), turfgrass production and maintenance, and florists. Not included are mass markets, hardware stores, farm markets, and other seasonal outlets than earn under 50% of their income from activities related to this industry. For this reason, this overall income and other numbers in this survey are conservative. In reality, these environmental horticulture activities are generating more income from more firms than these figures show!

Firm distribution by income



## The Environmental Horticulture Industry is Growing!

Over the 5 years between 1993 and 1998, income grew by 33%, or \$416 million.



Gross income over the 5 years between 1993 and 1998:

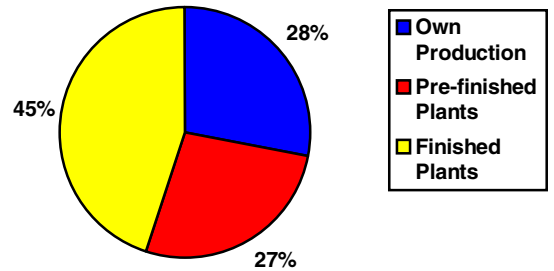
- ✓ increased for approximately 2449 firms, an average 69% increase per firm, an average 14% per year
- ✓ decreased for approximately 183 firms, an average 34% decrease per firm
- ✓ stayed the same for approximately 621 firms.
- ✓ There were approximately 402 new firms over this period

# The Environmental Horticulture Industry Produces Plants

Plant production accounted for \$379 million.

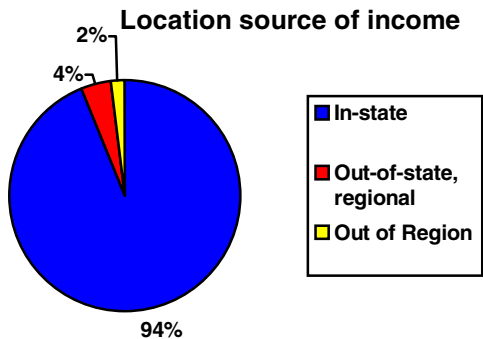
Overall environmental horticulture industry plant sales are estimated to be \$688million, or 41% of overall industry income. Of these plant sales, \$379 million were from plants produced partially or totally by the seller, and \$309 million were from finished plants bought for resale--either wholesale or retail. Of the self- or own-produced plants, \$193 million were from those propagated and grown totally by the seller, and \$186 million were from those purchased as young plants (pre-finished) and grown further prior to selling.

Plant Producers



## Where are the Environmental Horticulture Markets?

Most business income results from sales and services provided within the state.



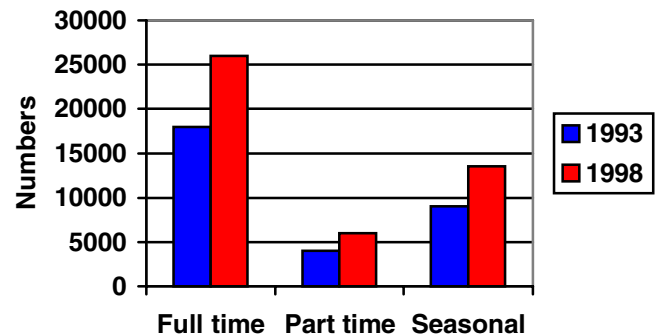
The majority of income from sales and services was from within the state, or \$1.57 billion. Income resulting from sales outside the state mainly comes from Connecticut (2%), followed by New Hampshire (1%) and Rhode Island (1%). Income resulting from sales outside the region mainly comes from other Northeast states (1%), followed by other states beyond the Northeast and Canada (1% combined).

## This Industry Provides Employment Opportunities

An additional 16,000 employees are needed in Environmental Horticulture

The Environmental Horticulture industry provided employment for at least 46,000 persons in 1998. Over the 5-year period from 1993 to 1998, jobs in this industry increased by 15,000 or 47%. This reflects increases in full-time jobs by 8,000 (or 47%), in part time jobs by 2,000 (or 41%), and in seasonal jobs by 5,000 (or 51%). In spite of these increases, if they could have found qualified employees, Environmental Horticulture firms in 1998 would have hired 8,200 more full time, 3,100 more part time, and 4,300 more seasonal employees. Payroll in 1998 was \$804 million (48% of income). Over half the firms (64%) paid more toward employees (average 61% more) than in 1993.

Employee categories



### More statistics on Environmental Horticulture in Massachusetts:

- ✓ In 1998, this industry paid \$140 million in taxes. Over half the firms (53%) paid more taxes (average 115% more) than in 1993.
- ✓ This industry is occupying and keeping 64,449 acres in agriculture. Of this, 43,181 acres (67%) are currently used for income.
- ✓ The top three ranked issues currently facing this industry are lack of qualified labor (23%), professional standards (19%), lack of perceived value (18%). Other ranked issues of major importance to this industry are government regulation (16%), pest management (9%), marketing (8%), and deer damage (2%).

