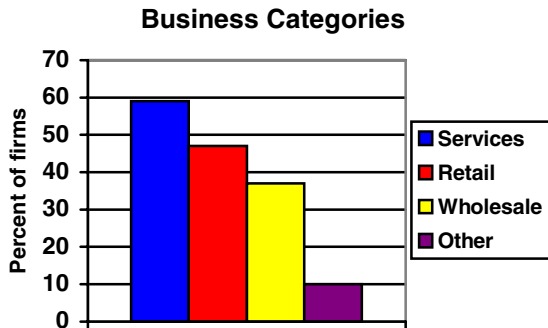


New Hampshire

\$381 million and Growing

Environmental Horticulture is *Many Types* of Businesses

A majority of firms provide landscape services.



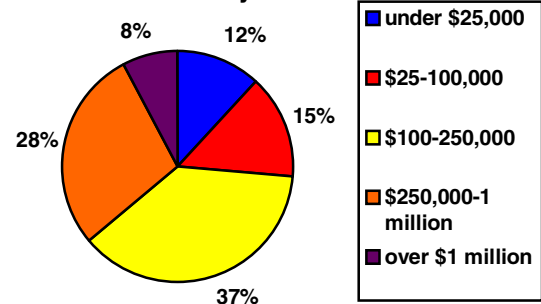
More firms derived income from providing landscape services (59%) than from other business categories. About half sold retail green goods (47%). These include plant items such as plants, sod, seeds, cut flowers and floral arrangements. Many firms (25%) also sold hard goods, or non-plant items such as tools, mulch, fertilizers, and vases. Of those wholesale firms (37%), most sold annuals, perennials, groundcovers and herbs (25%); trees and shrubs (14%); or turfgrass (3%). Of those service firms, most derived income from landscape construction/ installation (48%) or landscape maintenance/ lawn care (35%). Other service firms were involved with tree care (15%), landscape design/ architecture (11%), or delivery (5%). Income for some firms (19%) came from other activities.

Environmental Horticulture... a Major Sector of Agriculture

The total income for the New Hampshire Industry was at least \$381,000,000!

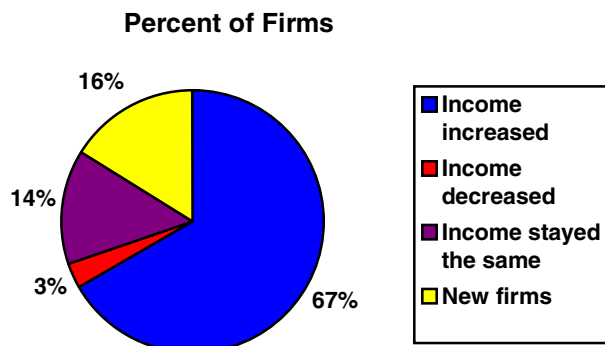
There are approximately 733 firms in the New Hampshire Environmental Horticulture Industry. These include nurseries, greenhouses, garden centers, landscapers (design, installation, maintenance), arborists (tree care), turfgrass production and maintenance, and florists. Not included are mass markets, hardware stores, farm markets, and other seasonal outlets that 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 55%, or \$135 million.



Gross income over the 5 years between 1993 and 1998:

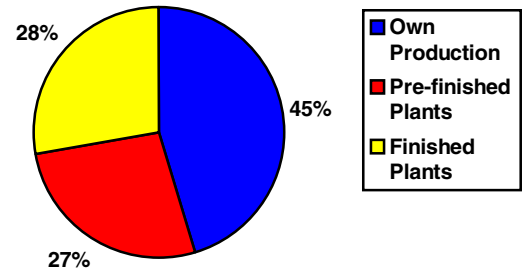
- ✓ increased for approximately 491 firms, an average 104% increase per firm, an average 21% per year
- ✓ decreased for approximately 22 firms, an average 16% decrease per firm
- ✓ stayed the same for approximately 103 firms.
- ✓ There were approximately 117 new firms over this period.

The Environmental Horticulture Industry Produces Plants

Plant production accounted for \$132 million.

Overall environmental horticulture industry plant sales are estimated to be \$183 million, or 48% of overall industry income. Of these plant sales, \$132 million were from plants produced partially or totally by the seller, and \$51 million were from finished plants bought for resale--either wholesale or retail. Of the self- or own-produced plants, \$83 million were from those propagated and grown totally by the seller, and \$49 million were from those purchased as young plants (pre-finished) and grown further prior to selling.

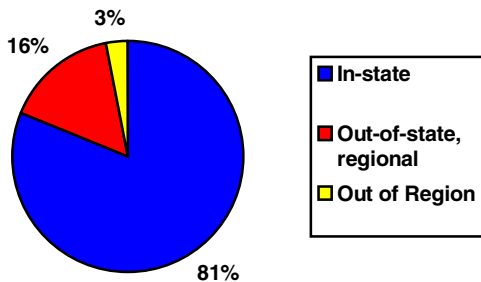
Plant Producers



Where are the Environmental Horticulture Markets?

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

Location source of income



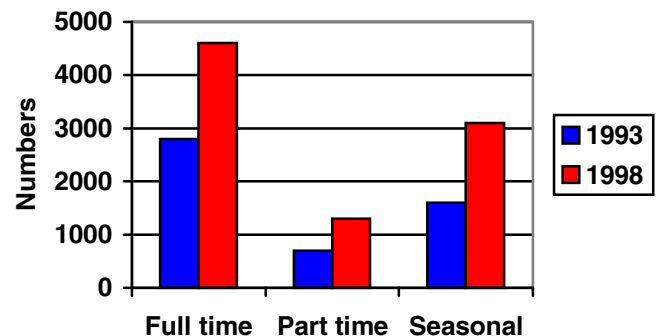
The majority of income from sales and services was from within the state, or \$309 million. Income resulting from sales outside the state mainly comes from Massachusetts (9%), followed by Maine (4%). Income resulting from sales outside the region mainly comes from other Northeast states (1%) and other states (2%).

This Industry Provides Employment Opportunities

An additional 2,300 employees are needed in Environmental Horticulture

The Environmental Horticulture industry provided employment for at least 8,900 persons in 1998. Over the 5-year period from 1993 to 1998, jobs in this industry increased by 3,700 or 73%. This reflects increases in full-time jobs by 1,700 (or 61%), in part time jobs by 500 (or 73%), and in seasonal jobs by 1,500 (or 93%). In spite of these increases, if they could have found qualified employees, Environmental Horticulture firms in 1998 would have hired 800 more full time, 300 more part time, and 1,200 more seasonal employees. Payroll in 1998 was \$151 million (40% of income). Over half the firms (64%) paid more toward employees (average 91% more) than in 1993.

Employee categories



More statistics on Environmental Horticulture in New Hampshire:

- ✓ In 1998, this industry paid \$13 million in taxes. Almost half the firms (46%) paid more taxes (average 44% more) than in 1993.
- ✓ This industry is occupying and keeping 16,506 acres in agriculture. Of this, 5,092 acres (31%) are currently used for income.
- ✓ The top three ranked issues currently facing this industry are lack of qualified labor (23%), lack of perceived value (19%), and government regulation (15%). Other ranked issues of major importance to this industry are professional standards (14%), pest management (13%), marketing (8%), and deer damage (5%).