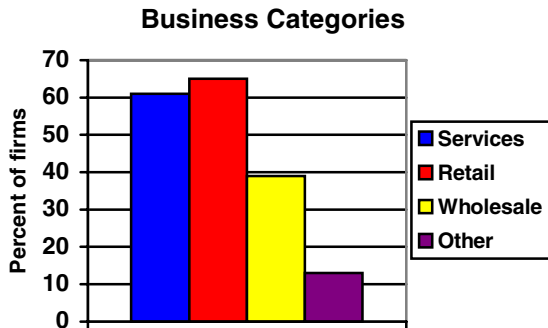


Vermont

\$187 million and Growing

Environmental Horticulture is *Many* Types of Businesses

Most firms sell plants or provide landscape services.



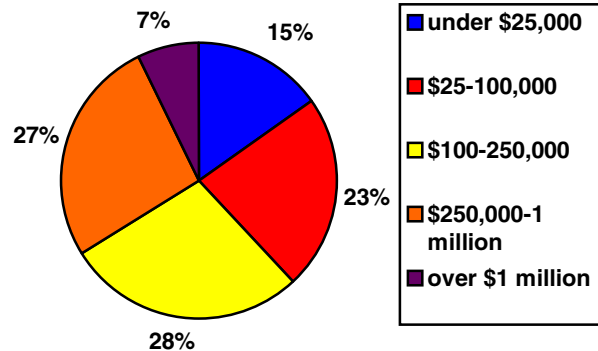
More firms derived income from selling green goods (65%) or providing landscape services (61%) than from other business categories. Green goods include plant items such as plants, sod, seeds, cut flowers and floral arrangements. Hard goods are non-plant items such as tools, mulch, fertilizers, and vases. Many firms (43%) also sold hard goods. Of those wholesale firms (39%), most sold annuals, perennials, groundcovers and herbs (20%) or trees and shrubs (14%). Of those service firms, most derived income from landscape construction/ installation (37%) or landscape maintenance/ lawn care (22%). Other service firms were involved with landscape design/ architecture (16%), delivery (16%), or tree care (13%), or other activities (13%).

Environmental Horticulture... a Major Sector of Agriculture

The total income for the Vermont Industry in 1998 was at least \$187,000,000!

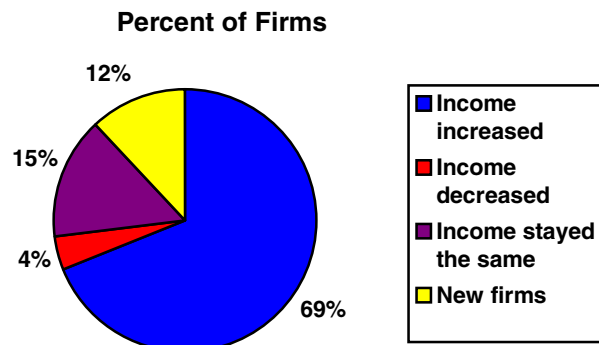
There are approximately 413 firms in the Vermont Environmental Horticulture Industry. These include nurseries, greenhouses, garden centers, landscapers (design, installation, maintenance), arborists (tree care), turfgrass production and maintenance, and florists. Not included are mass markets, hardware 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, industry income grew by 34%, or \$47 million.



Gross income over the 5 years between 1993 and 1998:

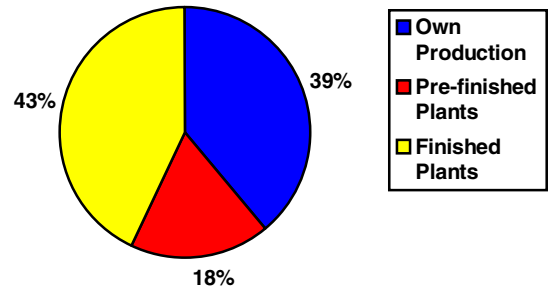
- ✓ increased for approximately 285 firms, an average 83% increase per firm, an average 17% per year
- ✓ decreased for approximately 16 firms, an average 10% decrease per firm
- ✓ stayed the same for approximately 62 firms.
- ✓ There were approximately 50 new firms over this period.

The Environmental Horticulture Industry Produces Plants

Plant production accounted for \$42 million.

Overall environmental horticulture industry plant sales are estimated to be \$74 million, or 40% of overall gross income. Of these plant sales, \$42 million were from plants produced partially or totally by the seller, and \$32 million were from finished plants bought for resale--either wholesale or retail. Of the self- or own-produced plants, \$29 million were from those propagated and grown totally by the seller, and \$13 million were from those purchased as young plants (pre-finished) and grown further prior to selling.

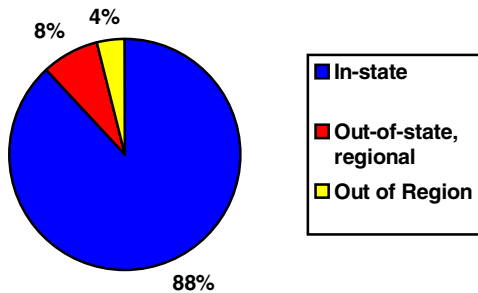
Plant Producers



Where are the Environmental Horticulture Markets?

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

Location source of income



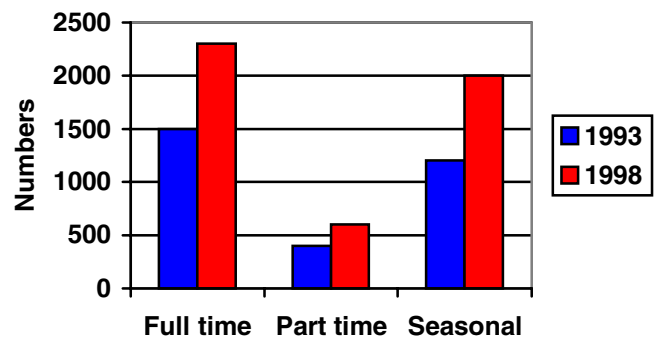
The majority of income from sales and services was from within the state, or \$165 million. Income resulting from sales outside the state mainly comes from New Hampshire (4%) and Massachusetts (2%). Income resulting from sales outside the region mainly comes from other Northeast states (3%).

This Industry Provides Employment Opportunities

An additional 1,000 employees are needed in Environmental Horticulture

The Environmental Horticulture industry provided employment for at least 4,800 persons in 1998. Over the 5-year period from 1993 to 1998, jobs in this industry increased by 1,700 or 55%. This reflects increases in full-time jobs by 700 (or 48%), in part time jobs by 200 (or 56%), and in seasonal jobs by 800 (or 63%). In spite of these increases, if they could have found qualified employees, Environmental Horticulture firms in 1998 would have hired 350 more full time, 200 more part time, and 500 more seasonal employees. Payroll in 1998 was \$67 million (36% of income). Over half the firms (66%) paid more toward employees (average 65% more) than in 1993.

Employee categories



More statistics on Environmental Horticulture in Vermont:

- ✓ In 1998, this industry paid \$9 million in taxes. Over half the firms (59%) paid more taxes (average 68% more) than in 1993.
- ✓ This industry is occupying and keeping 8,808 acres in agriculture. Of this, 3,072 acres (35%) are currently used for income.
- ✓ The top three ranked issues currently facing this industry are lack of qualified labor (20%), lack of perceived value (19%), and professional standards (16%). Other ranked issues of major importance to this industry are marketing (13%), pest management (11%), government regulation (10%), and deer damage (5%).