

Florida Nursery Crops and Landscaping Industry Economic Impacts, Situation, and Outlook¹

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Industry at a Glance

Florida's environmental horticulture or "Green industry" encompasses a wide range of businesses, including wholesale nursery and greenhouse producers; lawn and garden supplies and equipment manufacturing and wholesale trade; landscape design; installation and maintenance services; lawn and garden stores; and other retail establishments selling plants and related lawn and garden goods. The industry is affected by a number of *external* factors, such as housing market dynamics, the unemployment rate, consumer demand for discretionary goods, and transportation fuel prices, combined with *internal* factors, such as technological advances and intra-industry competition. However, when considering overall industry value, Florida is one of the leading environmental horticulture producers in the United States, ranked second only to California. In 2010, total industry sales were estimated at \$12.33 billion (B), including \$6.04 B for landscape services, \$4.27 B for wholesale nurseries, \$1.47 B for horticultural retailers, and \$558 million (M) for allied supplier firms (Hodges et al. 2011). The purpose of this report is to summarize the current situation, economic impacts, and outlook for the environmental horticulture industry in Florida.



Detailed Industry Situation

Sales Breakdown by Annual Sales Range and Market Region

According to a recent survey (Hodges et al. 2011), respondents who reported annual sales of \$10 M or greater comprised 1.4 percent of nurseries, 1.5 percent of landscape firms, 0.72 percent of retailers, and 14.1 percent of allied suppliers, while respondents with annual sales of less than \$100,000 represented 44 percent of nurseries, 32 percent of landscape firms, 36 percent of retailers, and 7 percent of allied suppliers surveyed (**Figure 1**).

Industry sales data were collected by market region, including international, national, state, and local regions. Any

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business within a 50-mile radius of a given city or county was considered local. For nurseries, 23 percent of total sales were to local markets, 22 percent were to other areas within the state of Florida, 52 percent were to other states, and 3.4 percent to other countries (Figure 2). Roughly 55 percent, or \$2.36 B, of nursery sales were to markets outside the state, and two-thirds (66%) of allied supplier sales were to out-of-state markets. Ninety-eight percent of retailers' sales and 92 percent of landscapers' sales were within the state.

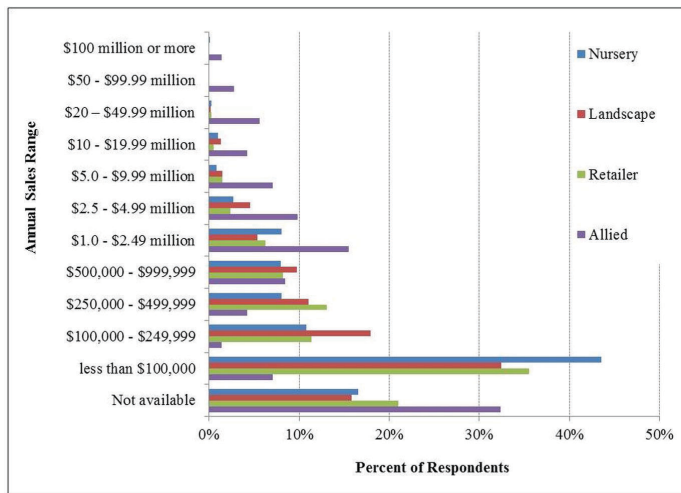


Figure 1. Distribution of survey respondents by annual sales range

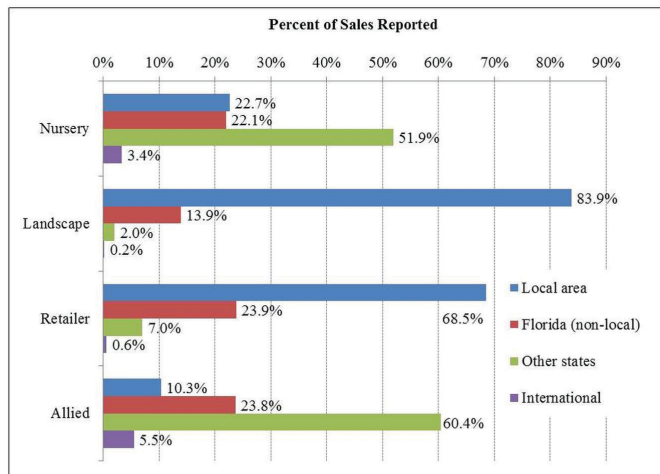


Figure 2. Distribution of Florida nursery, landscaper, retailer, and allied supplier sales by market region in 2010

Industry Employment Characteristics

Direct employment provided by the industry in 2010 (reported by surveyed firms; Hodges et al. 2011) totaled 25,136 persons, including 10,725 employees at nurseries, 6,644 in landscape services, 4,737 at horticultural retailers, and 3,030 with allied suppliers (Table 1). These employment figures are significantly higher than the number of employees reported to the Florida Department of Labor, Quarterly Census of Employment and Wages. Some 19,683 reported

employees (78%) worked full-time, and 5,453 (22%) were part-time, temporary, or seasonal. Part-time employment was reported by 79 percent of nurseries, 93 percent of landscape firms, 89 percent of retailers, and 52 percent of allied suppliers.

The employment figures reported by survey respondents were used to estimate state-level total employment in the industry. (Expansion factors are discussed in detail in Hodges et al. 2011.) Total industry employment was estimated at 204,762 jobs in 2010, including 157,102 full-time and 47,660 part-time jobs, with 63,822 employees for nurseries; 111,006 employees for landscape services; 26,903 employees for retailers; and 3,030 employees for allied suppliers (Table 1). Note that employment for allied suppliers was not expanded and represents only employees reported by survey respondents. Between January 2001 and December 2010, employment by Florida's horticulture industry grew by 11.15 percent, or at an average annual rate of 0.88 percent (Figure 3).

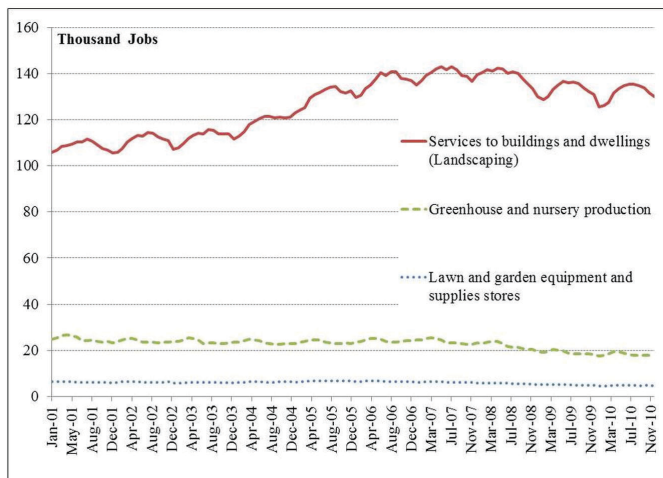


Figure 3. Florida environmental horticulture industry, direct employment, 2001-2010

Production Area

Nursery plants are one of the largest agricultural commodity groups in Florida, along with fruits, vegetables, and forest products (Hodges and Rahmani 2010). According to the Census of Agriculture for 2007, the state of Florida had over 4,700 commercial nursery and greenhouse farms, with a production area of 141,724 acres in the open and 7,760 acres (338 million square feet) under glass or other protective cover. Total sales for 2007 were \$2.116 B, and capital assets in land, buildings, and equipment averaged \$1.18 M per farm (USDA/NASS 2009). The average production area reported by respondents to a recent survey for greenhouse or shadehouse production was 2.2 acres (96,127 square feet), while the average area for container and field

production was 15.5 and 13.2 acres, respectively (Table 2) (Hodges et al. 2011). Total production area reported was estimated at 118,458 acres, including 59,487 acres for container production; 50,508 acres for field production; and 8,463 acres (369 million square feet) for greenhouses or shadehouses.

In 2010, over 38 percent of growers with greenhouse or shadehouse facilities had less than 10,000 square feet devoted to this type of production, while 0.7 percent had very large areas of over 1 million square feet (Figure 4). For container and field production areas, 2.3 and 4.2 percent of respondents, respectively, reported having more than 100 acres, while 52.1 and 41.4 percent, respectively, had less than 5 acres of production area (Figure 5).

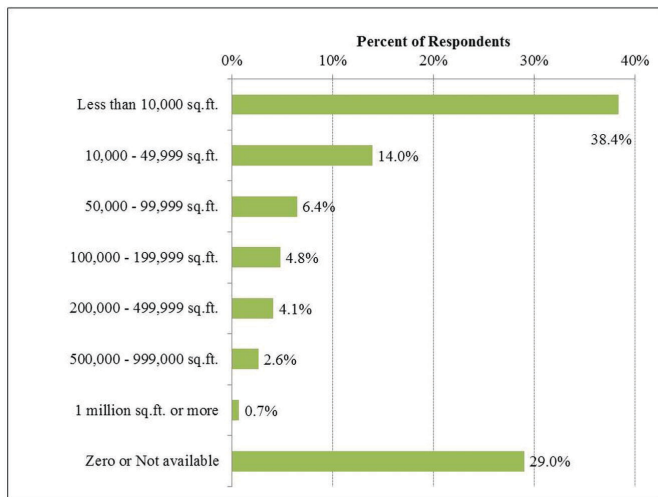


Figure 4. Distribution of Florida greenhouse or shadehouse production area reported by survey respondents for 2010

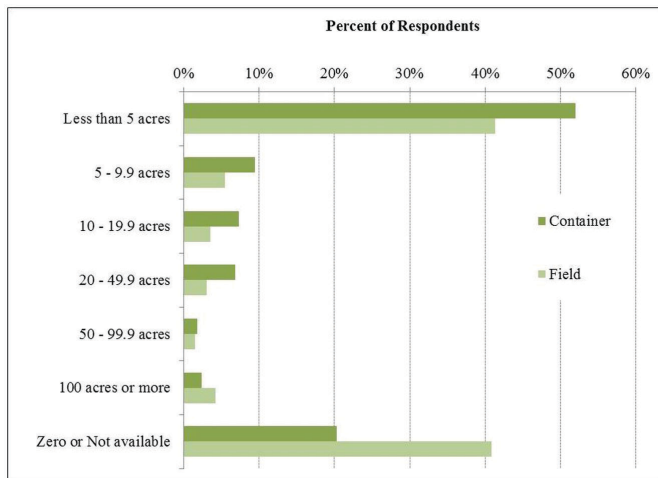


Figure 5. Distribution of Florida container and field nursery area reported by survey respondents for 2010

Total Sales Summary by Sector

Information on annual sales of environmental horticultural products and services was reported by 84 percent of

nurseries and landscape firms, 79 percent of retailers, and 68 percent of allied suppliers that were surveyed. Total annual sales for each industry sector were estimated based on the number of respondents reporting annual sales in each class together with expansion factors, as discussed under Methods. Sales reported by survey respondents averaged \$1.29 M (Table 3). Total industry sales estimated from the survey were \$12.33 B, including \$4.27 B by nurseries, \$6.04 B by landscape service firms, \$1.47 B by horticultural retailers, and \$558 M by allied suppliers. However, sales of horticultural products by Florida retailers were estimated at \$4.49 B based on data from the Florida Department of Revenue.

The following four subsections provide sales figures and percentage distribution of specific types of horticultural products and services in 2010, that is, sales by plant type for the nursery and greenhouse sector, sales by service and product type for the landscape firms sector, sales by product type for the retail sector, and sales by product type for the allied-supplier sector.

Nursery and Greenhouse Sector Sales by Plant Types

Sales of specific types of horticultural products and services are detailed in Figure 6 through Figure 8. For the nursery and greenhouse sector, the largest-selling product type in 2010 was tropical foliage plants, with sales of \$1.48 B, representing about 35 percent of total sales, followed by potted flowering or bedding plants (\$916 M, 22%), shrubs (\$431 M, 10%), palms (\$404 M, 10%), and miscellaneous other types of plants (\$237 M, 6%) as shown in Figure 6.

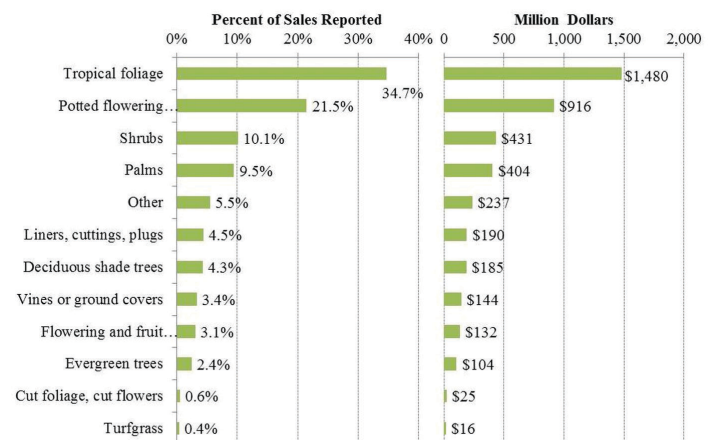


Figure 6. Distribution of plant type sales by Florida nurseries and greenhouses in 2010

Landscaping Sector Sales by Service and Product Type

For the landscape services sector, landscape maintenance (lawn care) comprised \$2.65 B, or approximately 44 percent of total industry sales (Figure 7). The second largest revenue-generating activity for this sector was landscape installation (\$1.38 B, 23%), followed by the sale of live plants (\$712 M, 12%) and landscape design (\$498 M, 8%) as shown in Figure 8.

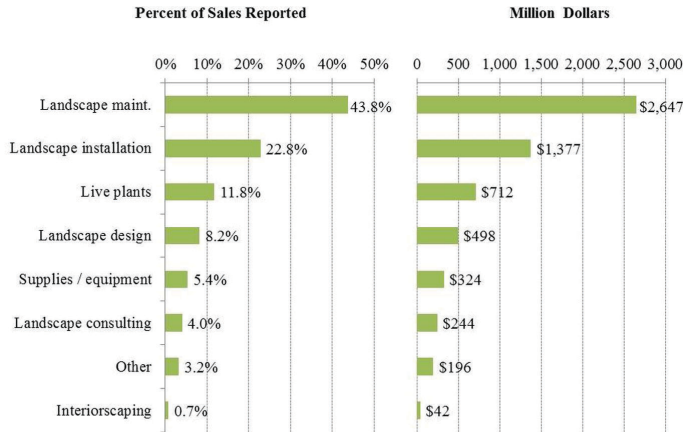


Figure 7. Distribution of sales by service and product type for Florida landscape firms in 2010

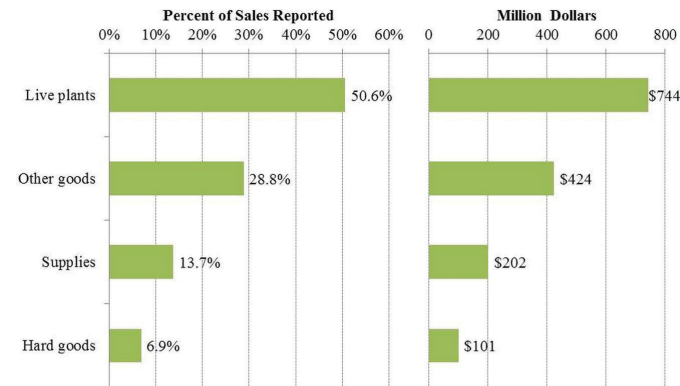


Figure 8. Distribution of product type sales by Florida horticultural retailers in 2010

Allied Supplier Sales by Product Type

For allied horticultural suppliers in Florida, chemicals constituted the most important type of product sold during 2010, at \$211 M, or nearly 38 percent of total sales, which was more than twice as large a share as any other product types (Figure 9). Other significant types of goods and services sold by allied suppliers were nursery containers (\$74 M, 13%), fertilizer (\$81 M, 15%), finance and insurance services (\$82 M, 15%), and miscellaneous other types (\$89 M, 16%).

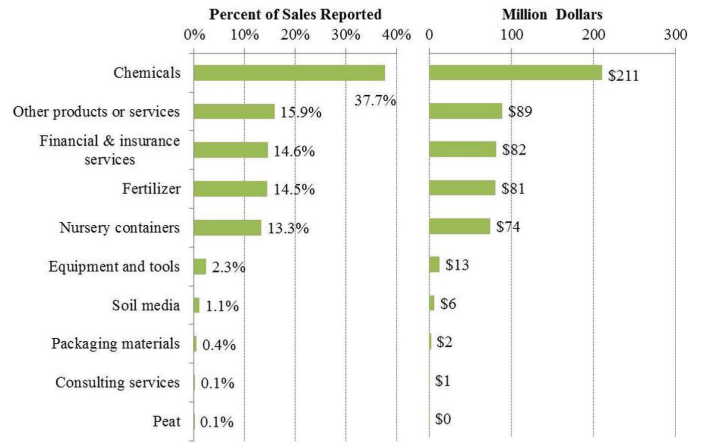


Figure 9. Distribution of product type sales and services by Florida allied supplier firms in 2010

Market Channels for Horticulture Products

Sales of Florida horticultural products and services to different types of customers are summarized in Figure 10 through Figure 13. For the nursery/greenhouse sector, sales to home improvement stores was the largest market segment, representing \$1.59 B, or 37 percent of total sales, followed by landscapers and interiorscapers (\$612 M, 14%), mass merchandise stores (\$543 M, 13%), re-wholesalers and brokers (\$471 M, 11%), industry retail garden centers (\$398 M, 9%), other growers (\$369 M, 9%), homeowners (\$157 M, 4%), developers and property managers (\$72 M, 2%), and miscellaneous other customers (\$55 M, 1%) (Figure 10).

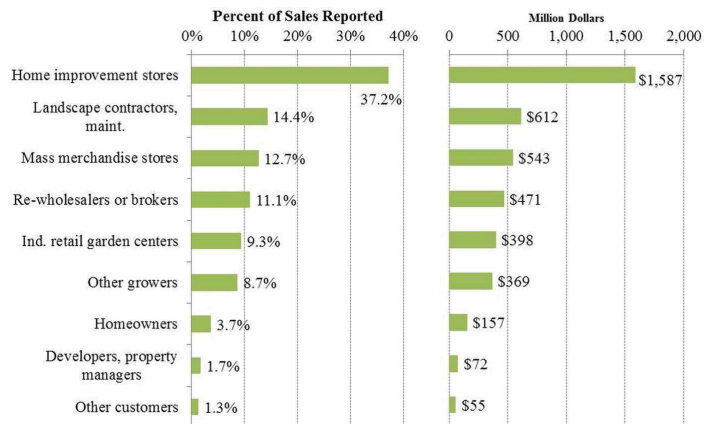


Figure 10. Distribution of Florida nurseries and greenhouse sales by customer type in 2010

The most important customer segment for landscape firms in the survey was homeowners, accounting for \$2.17 B, or nearly 36 percent of total sales, followed by apartments and condominiums (\$1.32 B, 22%). Other significant segments included commercial establishments (\$934 M, 16%),

builders and developers (\$651 M, 11%), other landscape firms (\$531 M, 9%), and government (\$328 M, 5%), as shown in **Figure 11**.

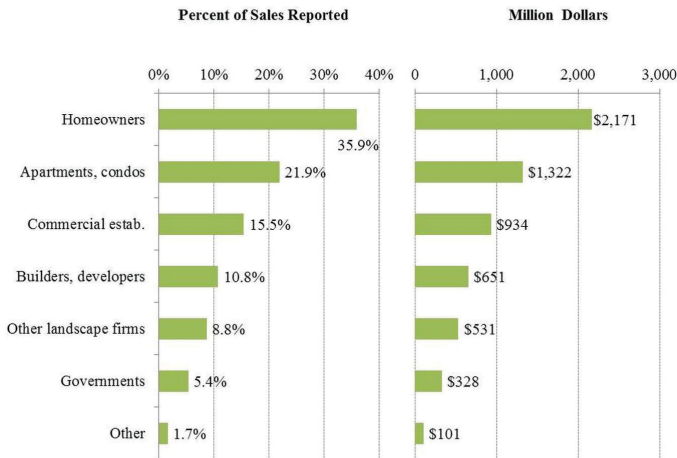


Figure 11. Distribution of Florida landscape service sales by customer type in 2010

For horticultural retailers, the largest customer segment was homeowners, who accounted for \$751 M, representing over one-half (51%) of total sales, followed by commercial establishments (\$285 M, 19%), apartments and condominiums (\$151 M, 10%), landscape contractors (\$111 M, 8%), other customer types (\$80 M, 6%), other retailers (\$55 M, 4%), and governments (\$36 M, 3%), as shown in **Figure 12**.

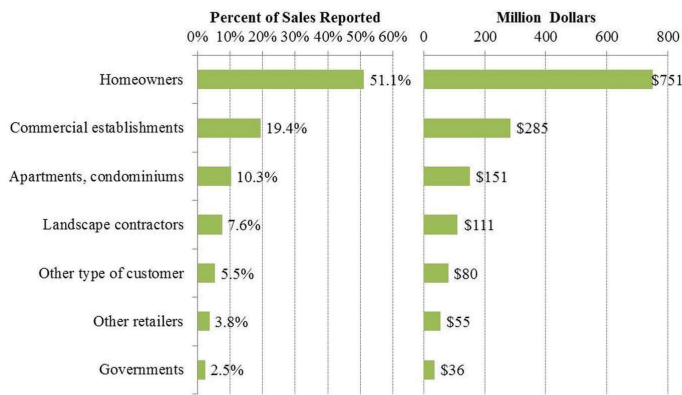


Figure 12. Distribution of Florida retail horticultural product sales by customer type in 2010

Allied suppliers are generally wholesale businesses that sell goods and services to other commercial establishments, rather than to final consumers. The largest customer segment was growers, with \$214 M, or 38 percent of total sales, followed by retailers (\$198 M, 35%), unspecified other types of customers (\$95 M, 17%), and landscapers (\$52 M, 9%), as shown in **Figure 13**.

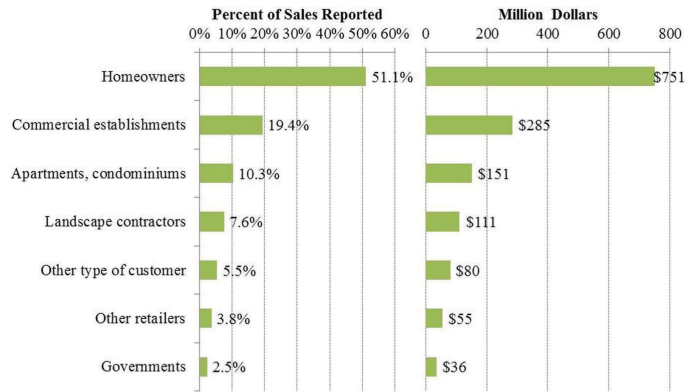


Figure 13. Distribution of Florida allied supplier sales by customer type in 2010

Summary of Economic Impacts

The total economic output or revenue impact of Florida’s environmental horticulture industry in 2010 was estimated at \$16.29 B. This impact included \$11.87 B in direct output impacts of industry sales, \$692 M in indirect output impacts from firms that supply inputs to the horticulture sectors, and \$3.72 in induced impacts associated with spending by industry employees and proprietor households, as summarized in Table 4 (Hodges et al. 2011). Total output impacts were \$8.12 B for nurseries, \$6.24 B for landscape services, \$1.68 B for horticultural retailers, and \$243 M for allied horticultural suppliers. Of the four environmental horticulture sectors, nurseries and greenhouses generated the largest share of indirect and induced multiplier impacts due to their much larger exports to domestic and international markets outside the state. The total employment impact of the environmental horticulture industry in Florida in 2010 was estimated at 244,188 jobs (full-time and part-time/seasonal positions), with 98,439 jobs generated by the nursery/greenhouse sector; 112,726 jobs from landscape services; 28,800 from horticultural retailers; and 4,223 jobs for allied suppliers.

Value added impacts are an important measure of an industry’s contribution to a regional economy, representing the difference between sales revenues and the cost of purchased inputs. Value added is comparable to Gross Domestic Product (GDP) and includes the value of employee wages and benefits, owner’s compensation, dividends, capital outlays, and business taxes paid. Total value added impacts of Florida’s horticulture industry in 2010 were estimated at \$9.90 B, comprised of \$5.04 B generated by the nursery/greenhouse sector, \$3.30 B by landscape services, \$1.40 B by retailers, and \$160 M by allied suppliers. Total labor income impacts, which are a subset of value added, were estimated at \$6.93 B for all sectors combined. Other property-type

income impacts, which include corporate profits, rents, dividends, royalties, and interest payments received, were estimated at \$2.30 B. Impacts on indirect business taxes paid to state and local governments in Florida, such as sales tax, property tax, fuel taxes, and excise taxes, were estimated at \$668 M. These results represented significant increases in the industry in Florida since the previous study done for 2005 (Hodges and Haydu 2006).

The overall age of firms in the industry in 2010 was 18.3 years (Hodges et al. 2011). The average years in business for nursery, landscape, and retail firms are comparable, with average ages of 18.1, 17.3, and 18.3 years in 2010, respectively. In contrast, responding allied supplier firms had been in business for an average of more than 27 years.

Industry Outlook

According to a recent floriculture crops report by the United States Department of Agriculture, National Agricultural Statistics Service (USDA/NASS), the wholesale value of Florida’s floriculture crops increased 1.1 percent from 2010 to \$835.2 M in 2011. In contrast, the wholesale value of floriculture crop production in California decreased by 0.4 percent to \$1.01 B from 2010 to 2011. Considering the 1.6 percent decrease in the wholesale value of floriculture crops in the top 15 producing states (Table 5), Florida is positioned relatively well. Although consolidation is likely to continue over the next five years, from 2010 to 2011, fewer numbers of growers exited the industry in Florida (6.3%) than in California (9.2%) and the other top 15 states (6.5%). Despite the small advances in technologies such as irrigation and disease-resistant varieties that may help individual operations to be more competitive, industry consolidation is expected to continue throughout the next year.

Consistent with previous reports (Hodges 2009), tropical foliage plants dominate in the wholesale category, accounting for more than half (53%) of the total sales, reaching \$443M in 2011, followed by potted flower plants (14%, \$114M), propagative material (10%, \$82M), and bedding/garden plants (10%, \$74M) (Table 6). While wholesale sales of herbaceous perennials, tropical foliage, and propagative materials increased by 14, 4.4, and 3.9 percent, respectively, from 2010 to 2011, annual bedding/garden, cut cultivated greens, and potted flower plants decreased by 8.5, 7.9, and 1.1 percent, respectively.

Among tropical foliage and cut cultivated greens, the wholesale value leaders were potted foliage plants, with a 4.7 percent increase in sales, reaching \$402M in 2011,

and foliage hanging baskets, with a 1.2 percent increase, reaching \$41M that year. Leatherleaf ferns and other cut cultivated greens plummeted by 12.6 percent to \$25M, and 3.6 percent to \$30M, respectively.

Opportunities for Growth in the Industry

Nursery/greenhouse, landscape services, and horticulture retailer industry survey respondents were asked about their level of interest in a variety of potential business development opportunities (Hodges et al. 2011). Responses to this question are summarized in Figure 14. Some opportunities applied only to particular sectors. The most popular opportunity for all three horticulture sectors was *growing/selling Florida Friendly plants*, with at least 50 percent of respondents in all groups indicating that they were either already engaged in this practice or were very interested in taking this opportunity. The next most popular opportunity overall was *expanding digital presence*, with 41 percent of retailers indicating a high interest or current engagement, followed by nurseries/greenhouses (37%) and landscape services (32%). A similar type of opportunity, *using social media*, was also popular, at 37 percent for retailers and 27 percent for nurseries and landscapers. *Networking or partnering with builders/developers* was a decidedly more popular opportunity for landscape services (48%) than it was for nurseries (27%) or retailers (30%). Landscapers were also more interested in *earning FNGLA professional certification* (38%), compared to nurseries (28%) or retailers (20%). *Using/selling biodegradable containers* had a fairly high level of interest or engagement for nurseries (31%) and retailers (36%). For opportunities relevant only to nurseries, 44 percent were very interested or were currently retailing directly to the public (Figure 14).

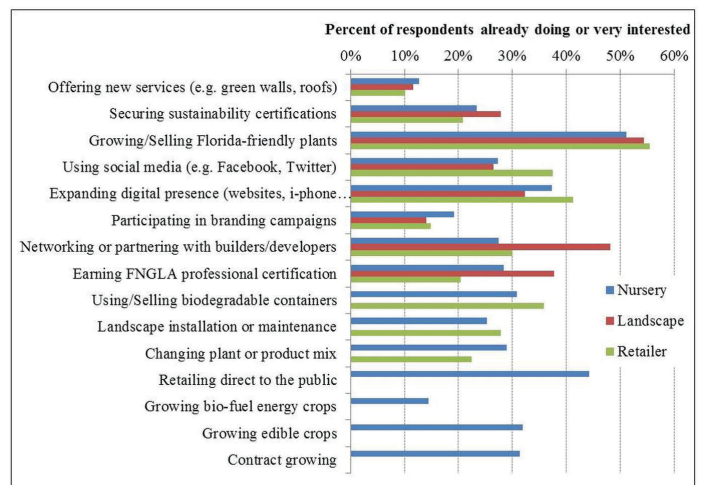


Figure 14. Opportunities for growth by Florida horticulture businesses in 2010

Threats to the Environmental Horticulture Industry

Survey respondents were asked to rate possible threats facing the environmental horticulture industry in Florida on a scale of 1 to 10, with 1 representing *not important* and 10 representing *very important*. Threats that, on average, rated above 7 on this scale by all four industry sectors were *energy or transportation costs* and *economic recession* (Figure 15). *Increasing costs of production* and *low prices for products or services* were the next two most highly rated threats to the industry, with average ratings above 6 by all four sectors. *Drought or water use restrictions* was rated above 6 on the importance scale by the landscape and nursery sectors, but between 5 and 6 for allied suppliers and retailers, while *government regulations* was rated above 6 for allied and nursery respondents and between 5 and 6 by retailers and landscapers. *Lack of professionalism* had an average rating above 5 by retailers and landscapers, and *market power of large retail chains* was rated above 5 by retailers and nurseries.

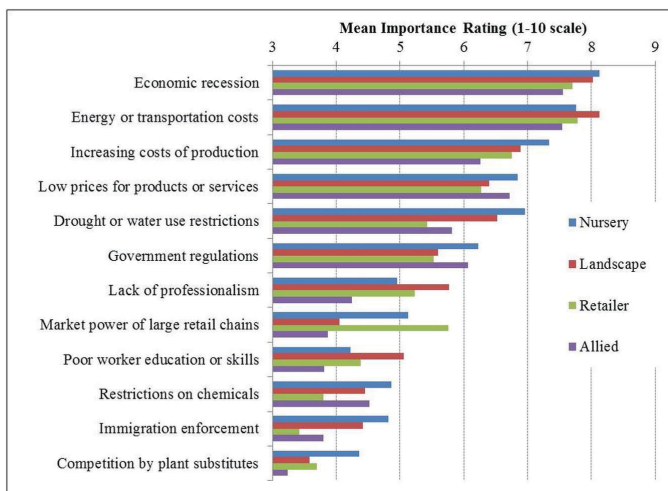


Figure 15. Importance ratings of industry threats by Florida horticulture sectors in 2010

Per-capita consumption is one of the critical determinants of demand for floriculture products. Although the unemployment rate in Florida dropped from the 10 to 11 percent range in 2009/10, to around 9 to 10 percent in 2011/12, it still stands above the US average, and adversely impacts consumer demand for highly discretionary products such as flowers/plants. A recent survey of consumer confidence by University of Florida’s Bureau of Economic and Business Research (BEBR 2012) showed that Floridians expect improvements in national economic conditions over the next five years. The survey respondents were not positive about the immediate changes, that is, improvements in the next year. According to the same survey, questions regarding personal financial situations did not return any positive

responses. Although consumer confidence in national economic conditions has been improving since early 2009, as shown in Figure 16, , the index may stay volatile (see the rapid drops in 2011) throughout the next year.

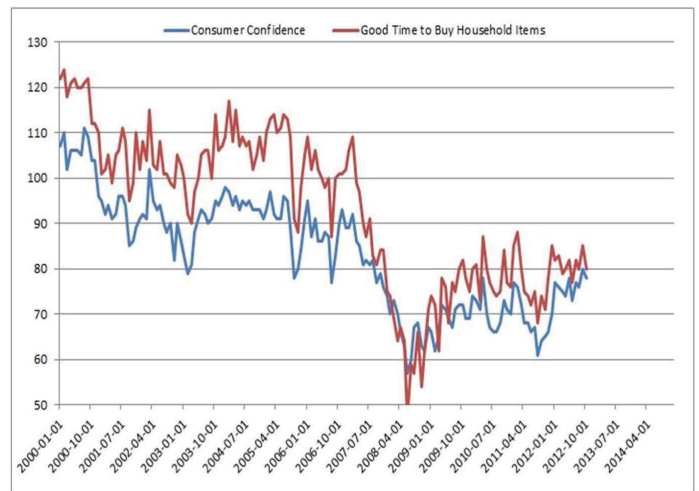


Figure 16. Florida consumer confidence index for October 1–15, 2012

For producers, emphasis on plant quality (e.g., increased flower-life for potted plants and vase-life for cut flowers) will continue to be one of the key priorities to meet the increasingly demanding consumers’ preferences. According to a recent national consumer survey, plant quality was named as the most important factor influencing consumers’ plant choice decisions (Khachatryan and Choi 2012). Price was the second most important attribute, followed by color, flowering, and guaranteed growth. For retail operations, it will be important to focus on 1) plant selection/varieties, 2) prices, 3) plant quality, 4) convenient location, 5) knowledgeable staff, and 6) great customer service, which were mentioned as the most important factors for store choice decisions out of 11 factors included in the survey.

The nursery and greenhouse industry’s economic performance is correlated with housing market dynamics, including existing home sales and new construction starts. According to a recent report compiled by Florida Realtors® for August 2012 (Florida Realtors® 2012), single-family closed sales have increased by 10.8 percent, compared to 2011. The demand for ornamental plants and landscaping services may increase due to this trend throughout the next year. One-year change in median sales price for single-family increased by 5.8 percent (\$147,000) for detached properties, and 13.2 percent (\$102,980) for attached properties. According to the same report, inventory declined significantly, by 32.3 percent, while new listings were decreased by 0.9 and 4.9 percent for detached and attached properties, respectively. Pending sales increased

considerably, by 40.2 and 27.6 percent for single-homes and townhouse/condo properties, respectively.

According to the S&P/Case-Shiller home price index for Florida, which measures the average change in residential property values, the indices for Miami and Tampa increased by 5.35 and 3.58 percent, respectively, for the 12 months of 2012 (Figure 17). After several small rebounds, it is unclear whether this positive momentum will be sustained over the next five years. Compared with the change in the national average home-price index of 1.22 percent, Florida's position is relatively favorable. However, since the Case-Shiller index tracks data only in two cities (Miami and Tampa) in Florida, changes in property values may not fully encompass county-level dynamics in the state. Nevertheless, even small positive changes in the US market create a window of opportunity for the industry because downstream sales will be stimulated by increased demand for landscaping or gardening.

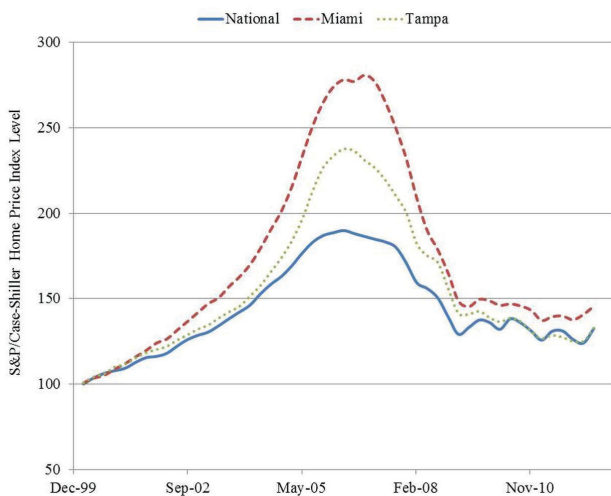


Figure 17. Comparison of national and Florida (Miami and Tampa) Case-Shiller home price indices (2000–2012)

The transportation industry is a critical component of the green industry, which provides freight services to the industry for both inputs and (perishable) output shipments. Almost all modes of transportation, including ocean, coastal, rail, and short- and long-haul freight trucking are used by the green industry to connect buyers and producers across the nation and abroad. Recent advancements in transportation efficiency translated into productivity gains for a number of major firms in the industry, allowing faster shipments to cross-country and international buyers. However, the world price of crude oil, which is the largest cost component of diesel fuel, has increased from \$25/barrel in 2002 to over \$100/barrel in 2013. This normally translates into higher costs for transportation firms and

other downstream users such as the green industry firms using those services. With a slowly recovering economy, most economists predict that diesel prices will increase, which could adversely impact the green industry.

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Table 1. Reported and expanded employment by Florida's environmental horticulture industry in 2010¹

Industry Sector	Employment Reported by Survey Respondents (Jobs)			Total Industry Employment (Jobs) ²		
	Full-time	Part-time	Total	Full-time	Part-time	Total
Nursery production	8,652	2,073	10,725	50,045	13,778	63,822
Landscape services	5,316	1,328	6,644	87,961	23,044	111,006
Horticultural retailing	2,914	1,823	4,737	16,295	10,609	26,903
Allied Suppliers	2,801	229	3,030	2,801 ³	229 ³	3,030 ³
Total	19,683	5,453	25,136	157,102	47,660	204,762

¹ The results in this table are based on Florida environmental horticulture industry survey conducted in 2011.

² Estimated based on survey expansion factors (see methods).

³ Not expanded.

Table 2. Reported and estimated total area for Florida greenhouse and nursery production in 2010

Type of Production Area	Average Area (acres)	Estimated Total Area (acres)
Greenhouse	2.2	8,463
Container	15.5	59,487
Field	13.2	50,508
Total		118,458

Source: Hodges et al. (2011).

Table 3. Reported and estimated sales of Florida environmental horticulture firms in 2010

Metric	Industry Group				Total/Avg.
	Nursery	Landscape	Retailer	Allied	
Respondents reporting sales	616	390	327	48	1,381
	<i>Million Dollars</i>				<i>Million Dollars</i>
Sum of reported sales	\$685.1	\$314.9	\$223.9	\$558.4	\$1,782.4
Average of reported sales per firm	\$1.11	\$0.81	\$0.68	\$11.63	\$1.29
Estimated total sales	\$4,265.3	\$6,039.1	\$1,470.5	\$558.4	\$12,333.4
to destinations outside Florida	\$2,357.2	\$136.1	\$112.1	\$368.2	\$2,973.6
to destinations inside Florida	\$1,908.1	\$5,903.0	\$1,358.4	\$190.3	\$9,359.8

Table 4. Summary of economic impacts of environmental horticulture industry in Florida in 2010

Sector	Employment	Output	Value Added	Labor Income	Other Property Income	Indirect Business Taxes
	<i>Jobs</i>			<i>Million Dollars</i>		
Nursery	98,439	8,122.3	5,038.7	3,546.3	1,265.8	226.6
Landscape	112,726	6,240.6	3,302.0	2,395.4	765.2	141.4
Retail	28,800	1,679.8	1,396.4	887.4	231.2	277.8
Allied	4,223	243.4	160.3	98.1	39.7	22.4
Total All Sectors	244,187	16,286.1	9,897.3	6,927.1	2,302.0	668.2

Table 5. Wholesale value and number of floriculture crop producers in the United States

	2010	2011	Percent Change 2010/11
Wholesale value (\$1000)			
United States (15 states) ¹	\$4,148,766	\$4,080,715	-1.6%
California	\$1,015,083	\$1,011,530	-0.4%
Florida	\$826,077	\$835,233	1.1%
Number producers			
United States (15 states)	6,164	5,763	-6.5%
California	696	632	-9.2%
Florida	749	702	-6.3%

¹ Fifteen states include California, Florida, Hawaii, Illinois, Maryland, Michigan, New Jersey, New York, North Carolina, Ohio, Oregon, Pennsylvania, South Carolina, Texas, and Washington.

Table 6. Florida wholesale floriculture sales by plant type

	2010 (\$1000)	2011 (\$1000)	Percent Change 2010/11
Annual bedding/garden plants	\$80,525	\$73,667	-8.5%
Herbaceous perennials	\$46,766	\$53,294	14.0%
Potted flower plants	\$115,421	\$114,162	-1.1%
Tropical foliage plants	\$424,103	\$442,650	4.4%
Cut flowers	N/A	\$3,663	
Cut cultivated greens	\$59,394	\$54,684	-7.9%
Propagative material	\$78,642	\$81,713	3.9%
Total All Types	\$804,851	\$823,833	2.4%