

Virginia
GREEN INDUSTRY

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Acknowledgements

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The face of agriculture in Virginia is rapidly changing to accommodate the economic realities of the times. Nursery crops, while having a long history in Virginia's agricultural profile, have emerged as a profitable and fast growing farm commodity. This statistical profile and economic survey provides insight into the significance of nursery and landscape activities in Virginia.

Here are a few highlights from the statistical profile:

- *Gross receipts \$1.20 billion in 2007 up 5 percent from 2002*
 - *Plant sales and Wholesale/Rewholesale Distribution accounted for 33%*
 - *Landscape Installation (exclude hardscape) accounted for 18%*
 - *Ground Maintenance accounted for 13%*
 - *Landscape (maintenance only) accounted for 11%*
 - *Landscape Installation (hardscape only) accounted for 8%*
 - *Design or Architectural Services accounted for 4%*
 - *Arboriculture and Christmas Trees accounted for 4%*
 - *Other categories accounted for 9%*
- *Woody plants topped product sales*
 - *Woody plants 57%*
 - *Annuals 20%*
 - *Herbaceous Perennials 11%*
 - *Other products (includes aquatic plants and christmas trees) 9%*
 - *Specialty Greenhouse Crops 3%*
- *Total expenses \$1.02 billion in 2007 up 10 percent from 2002*
- *Virginia growers reported 27,460 production acres, and 20.9 million square feet of covered space.*
- *Over 21,200 people are employed by the industry*
 - *59% are employed for over 150 days*
 - *Average labor wage is \$10.10/hr*
- *Current Market value of total value of land, structures, and equipment was \$1.31 billion.*

Please take time to review all of the data included in this publication. This important information is available to industry, legislators, lending institutions, and educators for formulating relevant policies and programs benefiting Virginia's citizens and the "Green Industry". We thank all those who participated and contributed to this very informative statistical and economic profile.

Herman Ellison
Director, Virginia Field Office



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2007 Virginia Green Industry Survey

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Sales

Sales of Horticultural Products and Services				
Category	2002		2007	
	Dollars	Percent	Dollars	Percent
	-Thousands-		-Thousands-	
Plant Sales	353,560	31	326,610	27
Wholesale/Rewholesale Distribution 1/	----	----	63,570	5
Landscaping (maintenance only)	274,510	24	129,430	11
Landscape Installation (exclude hardscape)	259,530	23	213,570	18
Landscape Installation (hardscape only)	105,400	9	101,350	9
Landscape Design Services 1/	----	----	28,250	2
Landscape Architectural Services 1/	----	----	21,290	2
Design or Architectural Services 2/	95,720	8	----	----
Christmas Trees 1/	----	----	17,640	2
Grounds Maintenance 1/	----	----	154,790	13
Arboriculture 1/	----	----	29,230	2
Other	54,710	5	109,490	9
Total Gross Receipts	1,143,430	100	1,195,220	100

1/ Data was not collected separately but included in total gross receipts in 2002.

2/ Data was collected separately in 2007.

Types of Plant Products Sold				
Sales by Product Type	2002		2007	
	Dollars	Percent	Dollars	Percent
	-Thousands-		-Thousands-	
Woody Plants	392,000	55	408,200	57
Spring Annuals	105,375	15	109,890	15
Herbaceous Perennials	91,715	13	81,390	11
Fall Annuals	43,690	6	36,840	5
Other (including aquatic plants & Christmas Trees)	38,658	6	62,130	9
Speciality greenhouse crops	37,370	5	24,280	3
Total	708,808	100	722,730	100

Product Source, Destination, Total Acreage & Growing Space

Source of Plant Material Sold				
Category	2002		2007	
	Dollars -Thousands-	Percent	Dollars -Thousands-	Percent
Purchased from Virginia nursery finished	246,350	35	206,360	29
Grown entirely on the farm where sold	187,270	26	208,710	29
Imported from another state completely finished	160,155	23	143,220	20
Purchased from Virginia nursery unfinished	60,413	8	80,270	11
Imported from another state unfinished	49,050	7	75,780	10
Imported from outside the USA	5,570	1	8,400	1
Total	708,808	100	722,740	100

Destination of Plants Shipped				
Category	2002		2007	
	Dollars -Thousands-	Percent	Dollars -Thousands-	Percent
Virginia	178,102	72	275,470	70
Outside of Virginia	67,856	28	118,100	30
Total	245,958	100	393,570	100

Total Acreage Under Production		
Category	2002 Acres	2007 Acres
Woody plants, trees, and shrubs	13,100	13,300
Herbaceous perennials	400	400
Fall annuals	250	260
Spring annuals	750	390
Specialty greenhouse crops	250	170
Aquatic plants	20	40
Christmas trees	4,600	6,700
Other	5,700	6,200
Total	25,070	27,460

Covered Growing Space				
Category	2002		2007	
	Square Feet	Percent	Square Feet	Percent
Heated film plastic greenhouses (hoop houses, or over-winter poly-house)	7,995,000	46	6,186,000	30
Unheated film plastic greenhouses (hoop houses, or over-winter poly-house)	6,335,000	37	9,930,000	47
Glass greenhouses	1,595,000	9	2,410,000	11
Rigid plastic greenhouses	912,000	5	1,216,000	6
Shade houses/ Slat houses	300,000	2	780,000	4
Other	122,000	1	339,000	2
Total	17,259,000	100	20,861,000	100

Labor and Expenditures

Average Hourly Rate			
Category	Average Hourly Rate		2007 -Dollars-
	2002 -Dollars-		
Laborers	\$8.95		\$10.10
Supervisors	\$12.04		\$13.20
Managers	\$15.08		\$17.10

Number Of Workers		
Category	2002	2007
	-Number-	-Number-
Workers employed 149 days or less	9,400	7,950
Workers employed 150 days or more	12,650	12,460
Unpaid workers	1,300	840
H2A, H2B, or seasonal migrant workers 1/	----	2,790
Received/health care benefits 1/	----	4,860
Received retirement benefits 1/	----	3,020
Received disability benefits 1/	----	2,390

1/ Data was not collected for the 2002 survey.

Expenditures				
Type of Expenditure	2002		2007	
	Total Amount	Percent of Total Expenses	Total Amount	Percent of Total Expenses
Labor	434,975,000	47	424,376,000	42
Plant Materials	150,209,000	16	172,954,000	17
Supplies	145,338,000	15	125,964,000	12
Taxes Paid 1/	25,036,000	3	----	----
Other 2/3/	177,892,000	19	298,942,000	29
Total	933,450,000	100	1,022,236,000	100

1/ Taxes paid included in other in 2007.

2/ Other includes equipment purchases, equipment renting and leasing, capital improvements, interest paid on business loans, insurance expenses, professional services, advertising, general office expenses, and other expenditures in 2002.

3/ Other includes taxes paid, equipment purchases, equipment renting and leasing, capital improvements, interest paid on business loans, insurance expenses, professional services, advertising, general office expenses, and other expenditures in 2007.

Labor and Expenditures continued

Dollars Spent In State				
Type of Expenditure	2002		2007	
	Dollars Spent In Virginia	Percent Spent In Virginia	Dollars Spent In Virginia	Percent Spent In Virginia
Labor	418,873,000	96	417,351,000	98
Plant Materials	93,342,000	62	96,155,000	56
Supplies	118,500,000	82	94,609,000	75
Taxes Paid 1/2/	23,784,000	95	----	----
Other 2/3/4/	167,762,000	94	----	----
Total 2/	822,261,000	88	----	----

1/ Taxes paid included in other in 2007.

2/ 2007 Data not published due to not comparable to 2002.

3/ Other includes equipment purchases, equipment renting and leasing, capital improvements, interest paid on business loans, insurance expenses, professional services, advertising, general office expenses, and other expenditures in 2002

4/ Other includes taxes paid, equipment purchases, equipment renting and leasing, capital improvements, interest paid on business loans, insurance expenses, professional services, advertising, general office expenses, and other expenditures in 2007.

Dollars Spent Out Of State				
Type of Expenditure	2002		2007	
	Dollars Spent Outside Virginia	Percent Spent Outside Virginia	Dollars Spent Outside Virginia	Percent Spent Outside Virginia
Labor	16,102,000	4	7,025,000	2
Plant Materials	56,867,000	38	76,799,000	44
Supplies	26,838,000	18	31,355,000	25
Taxes Paid 1/2/	1,252,000	5	----	----
Other 2/3/4	10,130,000	6	----	----
Total 2/	111,189,000	12	----	----

1/ Taxes paid included in other in 2007.

2/ 2007 Data not published due to not comparable to 2002.

3/ Other includes equipment purchases, equipment renting and leasing, capital improvements, interest paid on business loans, insurance expenses, professional services, advertising, general office expenses, and other expenditures in 2002

4/ Other includes taxes paid, equipment purchases, equipment renting and leasing, capital improvements, interest paid on business loans, insurance expenses, professional services, advertising, general office expenses, and other expenditures in 2007.

Survey Methodology

2007 VIRGINIA GREEN SURVEY

The 2007 Green Industry Survey is the second comprehensive study of the entire Green Industry in Virginia. These statistics are crucial in obtaining state and local government support on various issues.

OBJECTIVE

The purpose of the 2007 Green Industry Survey is to measure the economic importance of Virginia's nursery, greenhouse and landscape services industry. The survey produces current information on the production of various types of plants grown and sold in and outside of Virginia and landscape services provided by the industry. In addition, the study provides information on the number of workers employed by the industry and average wage rates.

POPULATION

The Green Industry as defined for this survey includes businesses or individuals who are wholesale producers or providers of landscape services. Wholesale producers include growers involved in wholesale only, re-wholesale distribution, or wholesale/retail. The landscape service provider includes businesses or individuals involved in landscape installation, maintenance, design, and architecture. The survey did not attempt to cover the retail sector except where a wholesale producer also operated as a retail operation. For this reason large retail chains are excluded from the sample population.

SURVEY DESIGN AND DATA COLLECTION

The sample included all wholesale nurseries licensed by the Virginia Department of Agriculture and Consumer Services. In addition, other name sources were purchased to compile a list of individuals and businesses involved in the Nursery and Landscape Industry.

A sample of 7,431 questionnaires was mailed to potential respondents in January 2008. In February 2008, a second mail out was made to all who did not respond to the initial mailing. Follow up telephone and personal (face to face) contacts were made to the remaining non-respondents who failed to return the questionnaire by mail.

NON-RESPONSE ADJUSTMENT

There was no attempt made to conduct a special study of the non-response population. The assumption was made that the characteristics of non-respondents were no different than those who responded to the survey. Therefore, missing items for partially completed reports were estimated based on reported data from operations of similar size and scope.

RESPONSE

A total of 2,658, or 36 percent of recipients responded to the survey. Of this total, 105 indicated they did not have nursery or landscape sales at this time but will have future sales. Another 1,332 reported they were not involved in the nursery or landscape business.

